



DocuSign FAQ

1. When can I use DocuSign?

For every applicant/insured that has an email address and is comfortable with processing their application over the phone.

2. What states are available to use DocuSign?

Texas, Florida, Illinois, Michigan, Ohio, Indiana and California currently. We will have more states in the weeks ahead.

3. What Life products qualify for using DocuSign?

All of our Term and Whole Life Products including our 3 Final Expense plans.

4. How does DocuSign work?

Agent retrieves state specific form-fillable application from agent portal (See attached) Agent then initially enters:

- a. Her/his agent name & email address
- b. The name & email address of the insured (*if adult*)
- c. The name & email address of the applicant (payor) if different from the insured or owner (*if applicable*)
- d. The name & email address of the owner if different from the insured or applicant (payor) (*if applicable*)

Agent conducts phone interview with insured/applicant and asks all the questions on the application. Agent then enters the city, state, date, month and year and electronically signs the application.

Once that is complete, application is automatically emailed to the **insured/applicant/owner** for whomever you included email addresses at the start of the application process.

For further information take a look on You-Tube for familiarity as well.

Any questions, contact Michael Dziadkowiec Michael-dzaidkowiec@prcua.org 773-782-2642



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