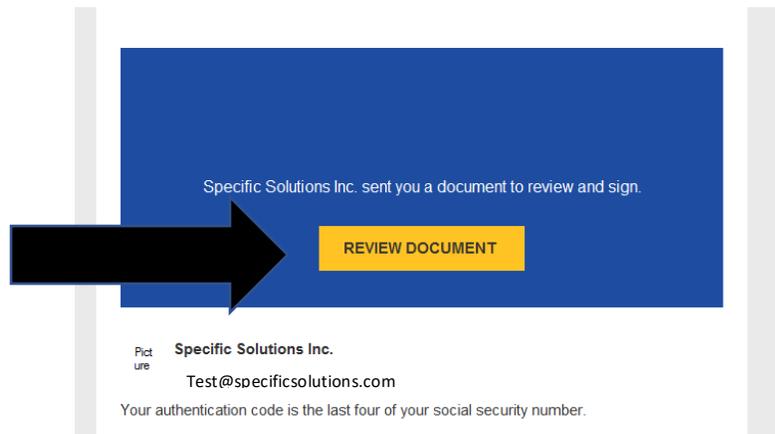
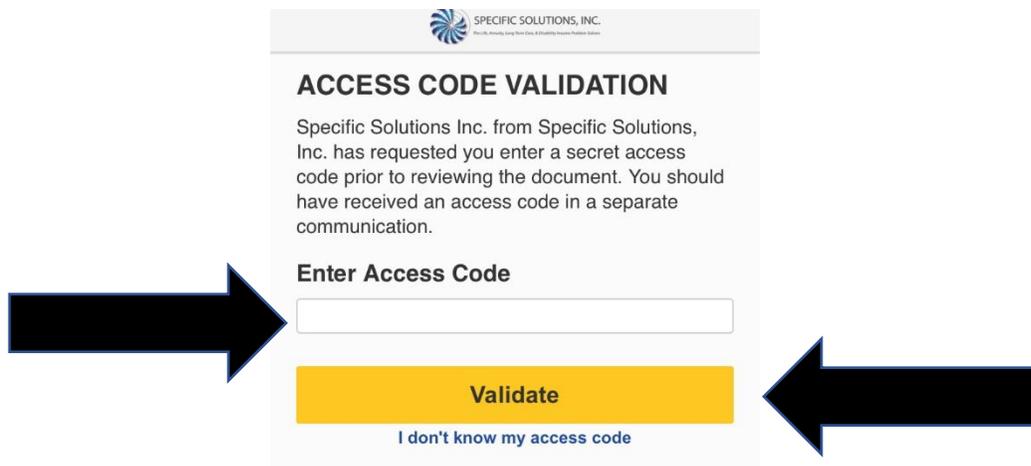


# Specific Solutions DocuSign Guide

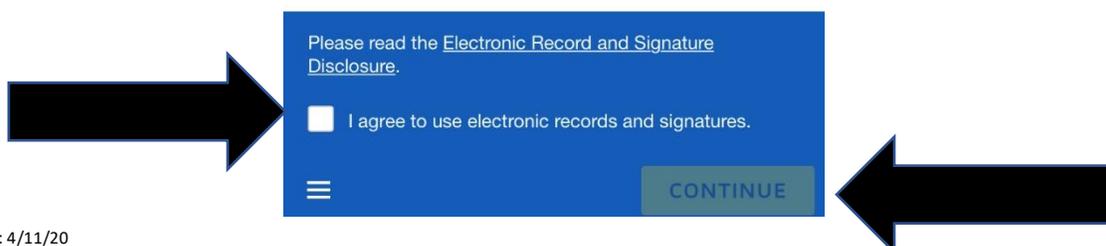
1. Specific Solution will email you a DocuSign Link
  - a. We recommend not clicking this link until you have your client(s) on the phone (this way you can sign the application and then your client can sign the application right after you)
  - b. Once you sign the application, it is automatically sent to your client(s) for signatures



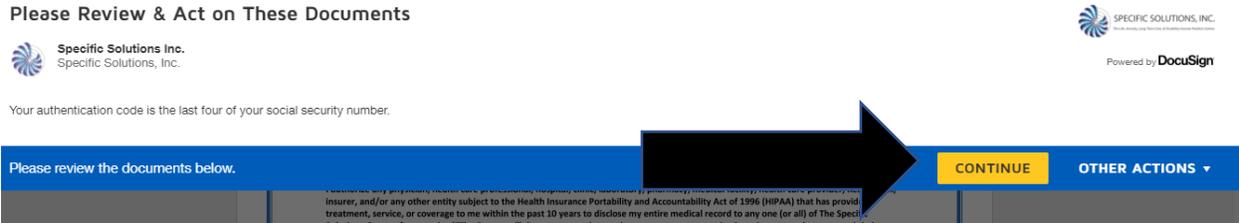
2. Click "Review Documents" when you are ready to sign
3. Access Code Validation will pop up
  - a. This will be your last four of your social security number. When your client(s) is signing, their authentication code is their last four of their social security number
  - b. Click Validate



4. You will have to agree with our disclosure for using Electronic Signature



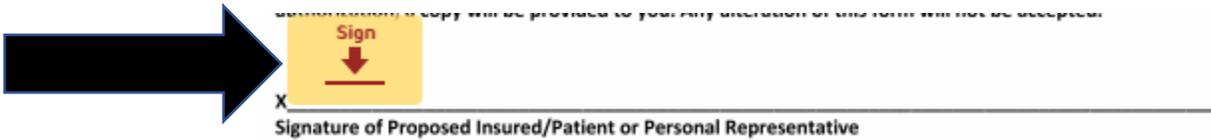
5. Click continue and the document will load



- 6. You may have a combination of signatures and text boxes
  - a. This is a textbox, please read what is required and type that information in



- b. This is a signature, just click sign and the electronic signature will be attached



7. Once all textboxes and signatures are completed, click "Finish"



8. Once you have completed your portion, the application or form will be sent automatically to your client(s).

9. **We recommend you have the client on the phone as you do your portion.** That way once you have completed your portion, you can walk them through theirs.
  - a. This will allow for you and your client to have the same signature dates
  
10. Once you and your client(s) have completed your portions, Specific Solutions will receive a completed application or form
  - a. You and your client(s) will also receive the completed application or form

**Completed: Please DocuSign: NY Client Packet**

Specific Solutions Inc. via DocuSign to you

12:18PM [Show Details](#)

 NY Client Packe...pdf (451 KB)

11. DocuSign will offer to sign you up for an account for free. This is **OPTIONAL** and will allow you to sign documents for anyone that uses DocuSign in the future
  - a. Not signing up **WILL NOT** stop Specific Solution from receiving the completed documents

### Save a Copy of Your Document

Sign up for a FREE DocuSign account today and sign all your documents electronically.

Email  
Test@specificsolutions.com

Password

Confirm Password

Country  
-- select --

By clicking the 'SUBMIT' button, you agree to the [Terms & Conditions](#) and [Privacy Policy](#).

**SUBMIT** NO THANKS

12. You have now completed your DocuSign. Specific Solution will receive the completed paperwork and will reach out with any questions

**Having Issues? We are here to help!**

**[Esign@specificsolutions.com](mailto:Esign@specificsolutions.com)**

**800-873-2345**