MARCH 28, 2022

Prudential

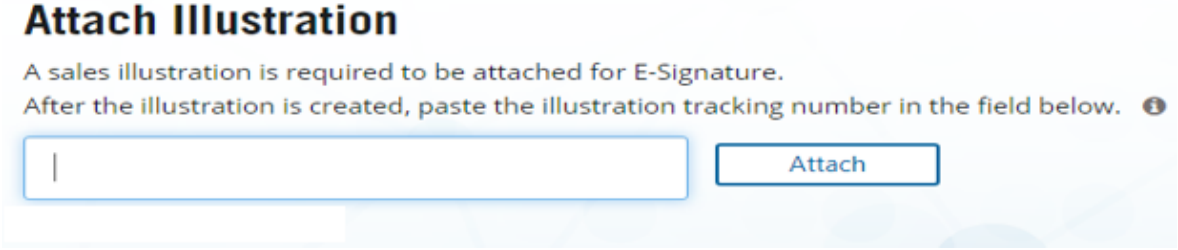
LIFEESSENTIALS

An Enhancement to the 4-Step PruSign eDelivery Process Allows for the Inclusion of the Delivery Illustration.

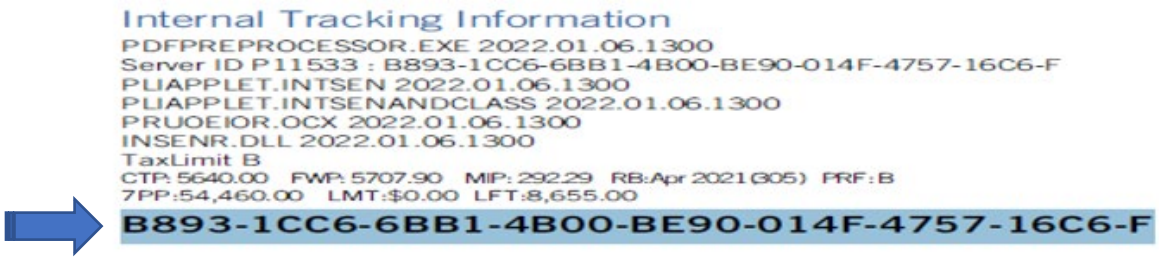
Great news! Effective Monday, April 11, we will be adding the ability for the Brokerage General Agency (BGA) to include the delivery illustration to the eDelivery package! This means the producer and policyowner can now electronically sign the delivery illustration along with all other delivery requirements. This enhancement applies to all PruSign eDelivery policies that follow this path: Prudential > BGA > Producer > Insured/Policyowner and back to Prudential.

How to Link the Illustration

If an illustration is required for delivery, a new “Attach Illustration” section will display in PruSign when the BGA is ready to acknowledge the policy.



To attach the illustration, the BGA will locate and copy the internal tracking number, as seen below, near the back of the illustration.



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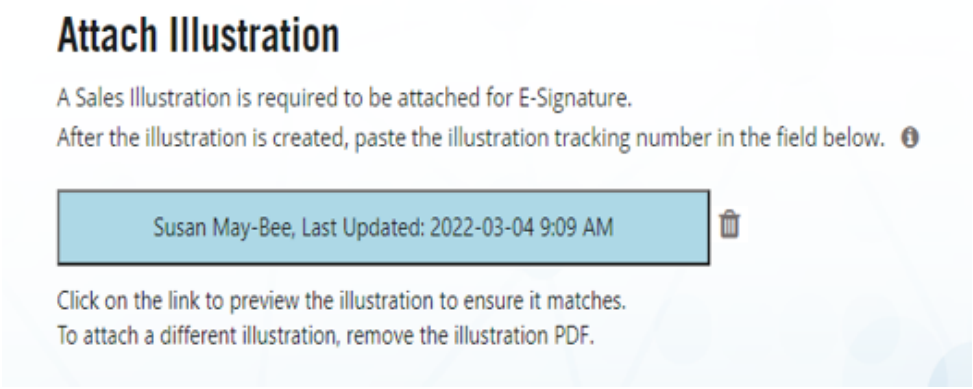
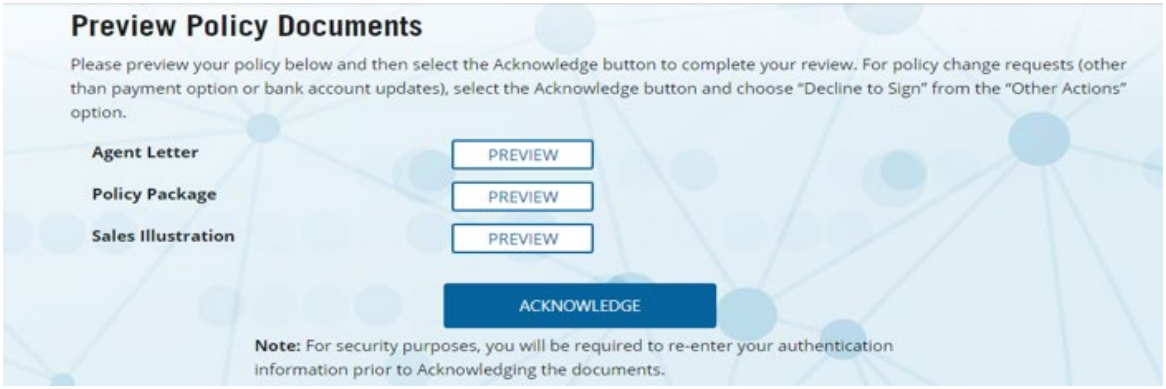
Within the PruSign application, paste the tracking number into the proper field in PruSign, as shown in the screenshot below, and click “Attach.”

Please note: Errors may occur if an incorrect number is entered or if the client’s last name differs between the illustration and how the policy was issued.

Once the illustration is attached, the BGA can preview the illustration to ensure the proper illustration was inserted. If an incorrect illustration was attached, it can be removed and the correct one attached.



A copy of the illustration is also viewable from the Preview Policy Documents section in PruSign.



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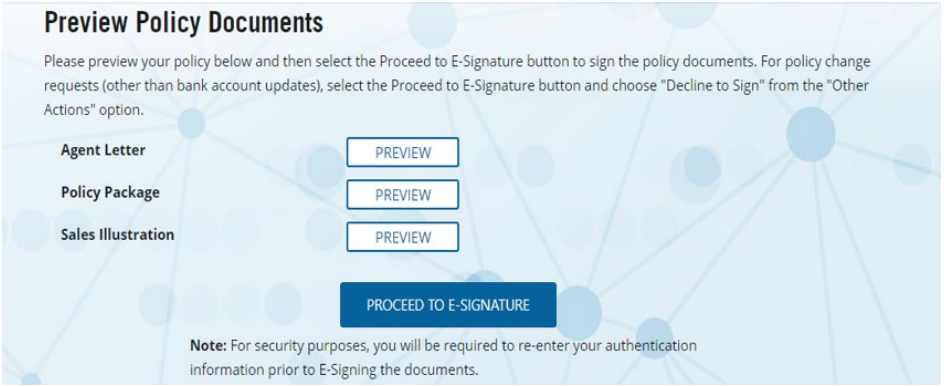
Producer Role

After the BGA attaches the illustration and acknowledges the policy, the producer will receive their eDelivery email. The below screenshot represents what the producer will see when they are ready to eSign the policy.



Note: If an incorrect illustration was attached or if policy changes are needed, a request must be submitted to have the policy reissued and resent to the BGA. The producer can decline to sign the policy following the below instructions.

- From PruSign, the producer will select the PROCEED TO E-SIGNATURE button, which redirects them to DocuSign.
- In DocuSign, they will (re)authenticate and then choose “Decline to Sign” from the “Other Actions” option.

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