ENHANCING THE E-SIGN EXPERIENCE

Making e-signing faster, friendlier, and simpler for your members

May 2020

Unless otherwise noted, changes were implemented on May 27, 2020.

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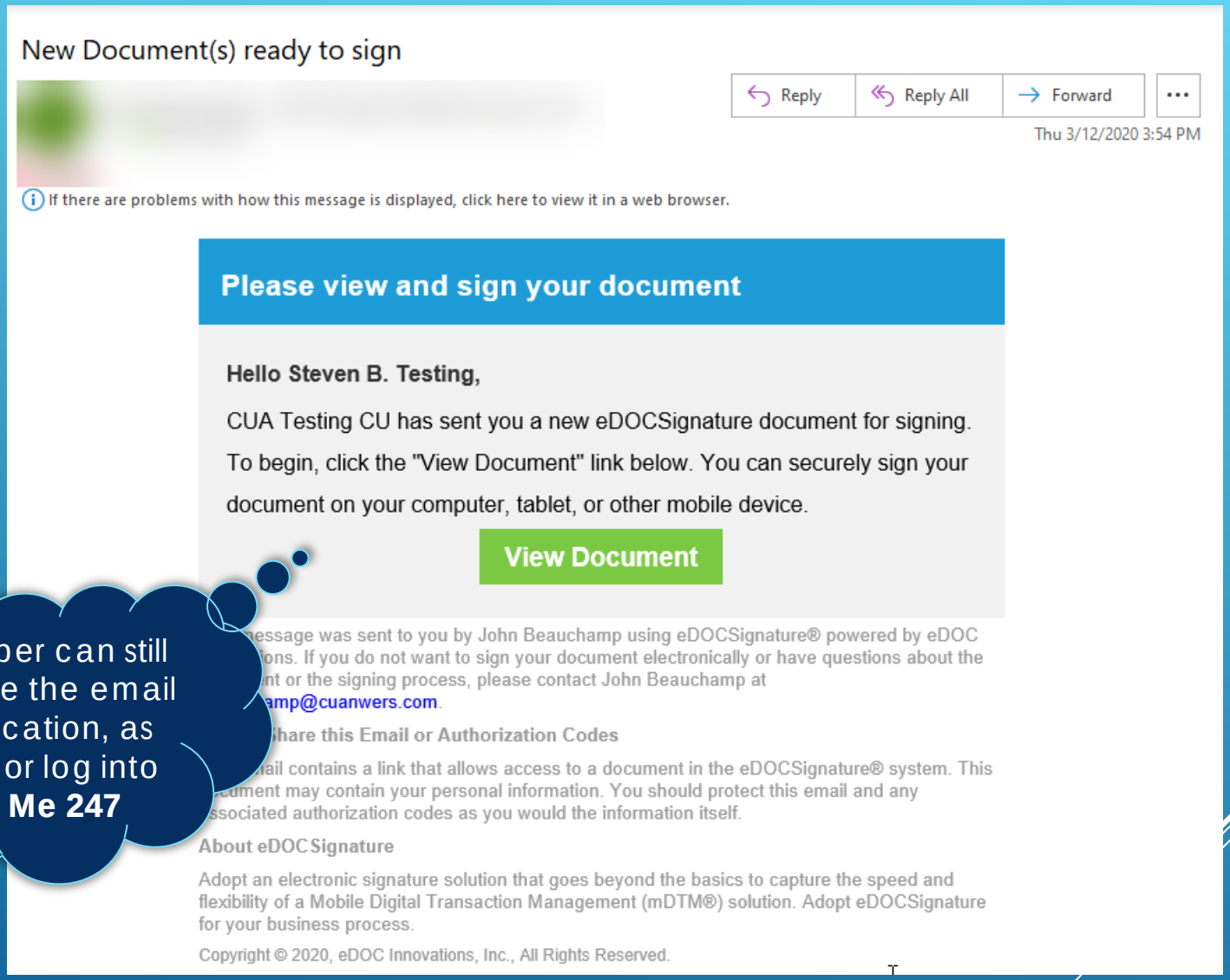
INTRODUCING A NEW eDOC E-SIGN EXPERIENCE

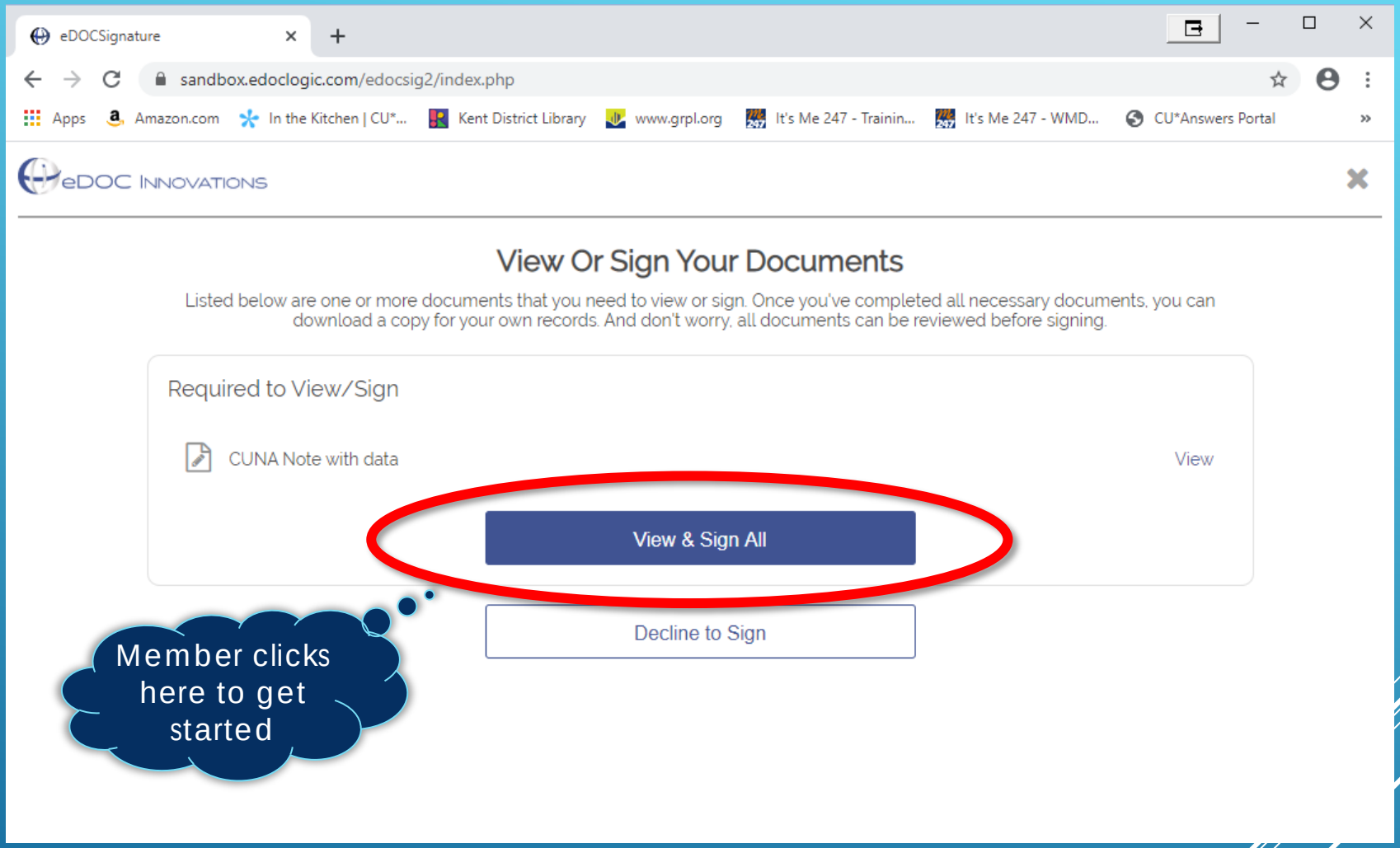
CHANGES COMING SOON TO THE EDOC ONLINE AND MOBILE E-SIGN EXPERIENCE

ENHANCEMENTS TO THE CURRENT E-SIGN EXPERIENCE



Member can still receive the email notification, as now, or log into **It's Me 247**

ENHANCEMENTS TO THE CURRENT E-SIGN EXPERIENCE



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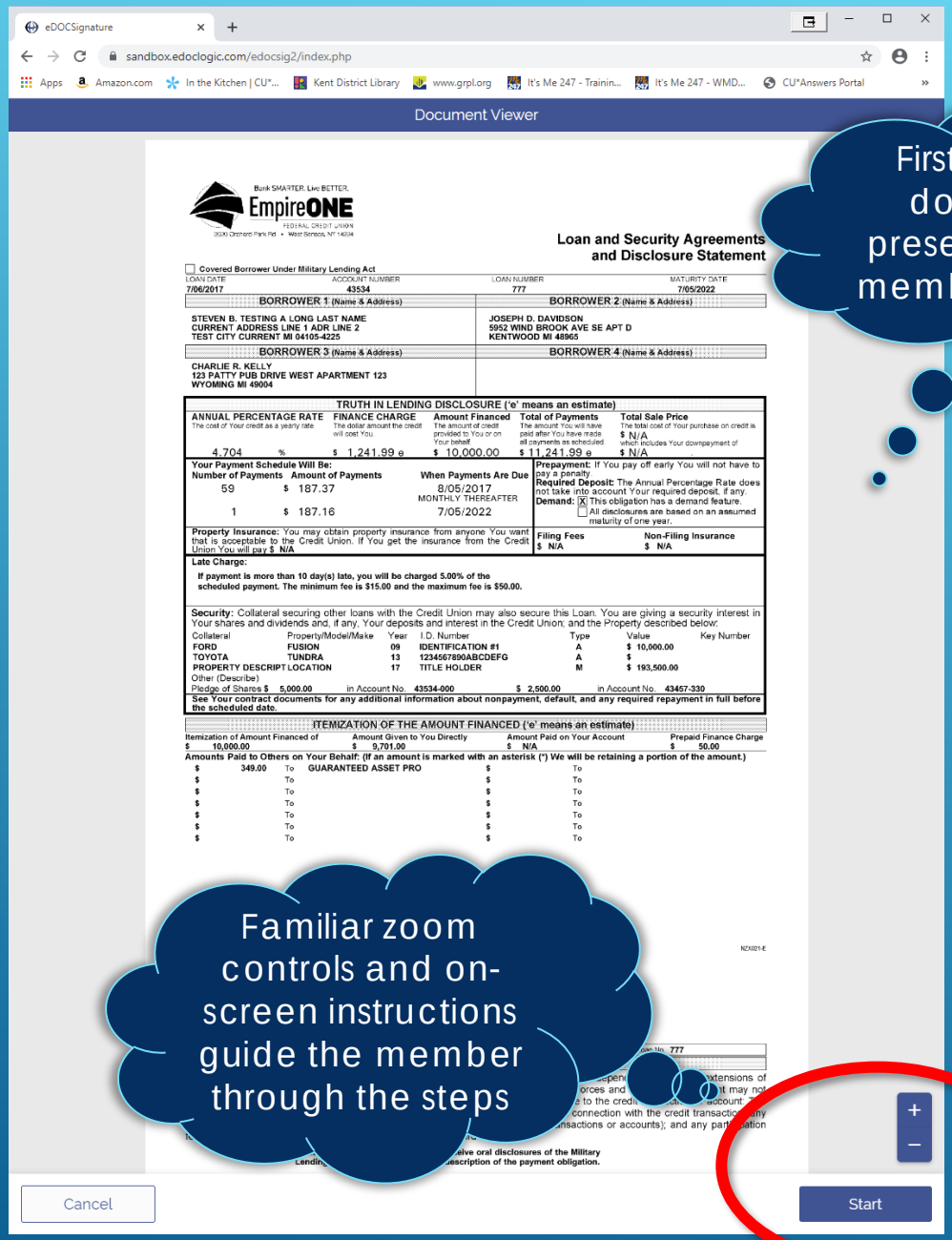
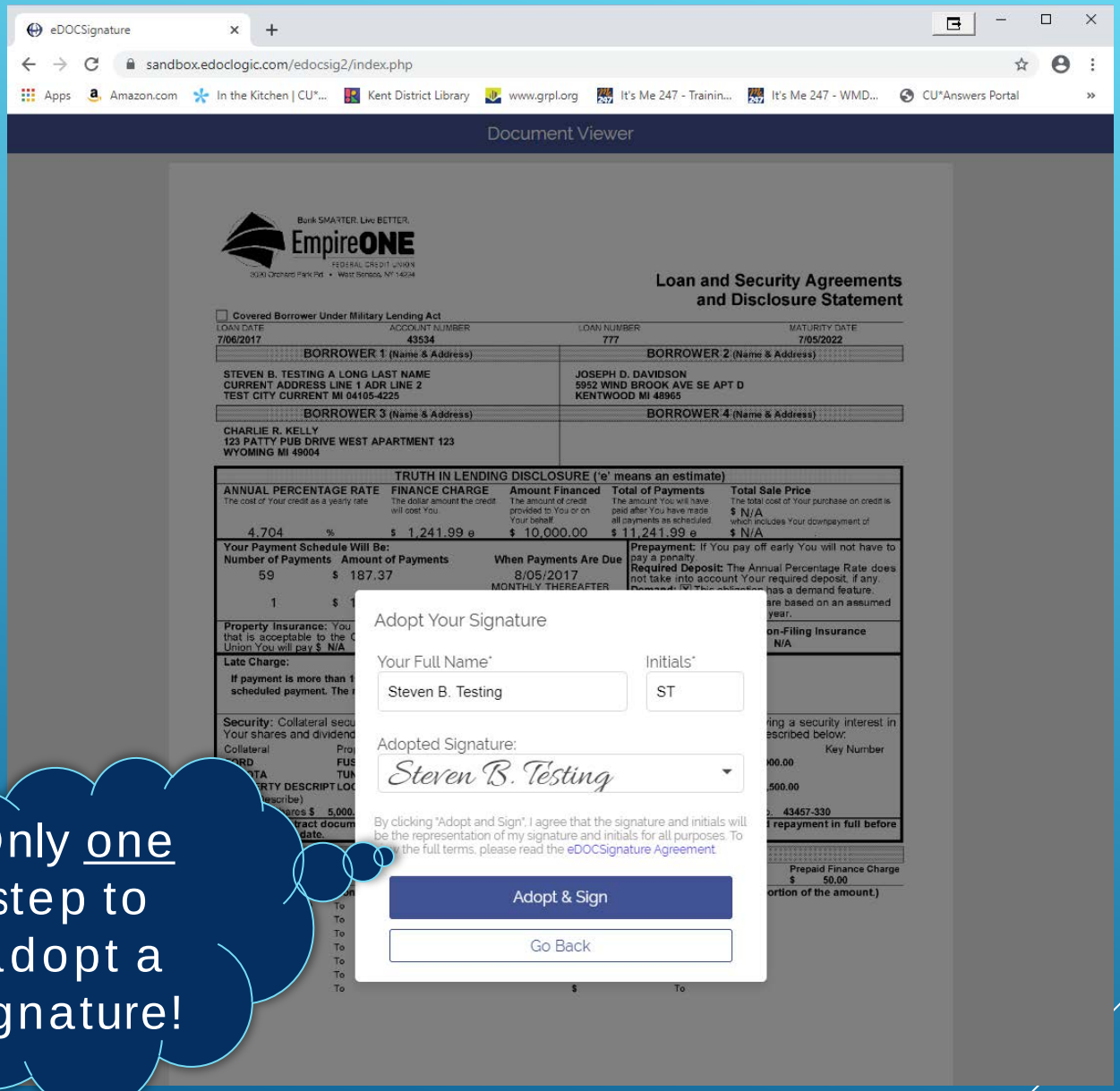


First the entire document is presented for the member to review

Familiar zoom controls and on-screen instructions guide the member through the steps

ENHANCEMENTS TO THE CURRENT E-SIGN EXPERIENCE



Only <u>one</u> step to adopt a signature!

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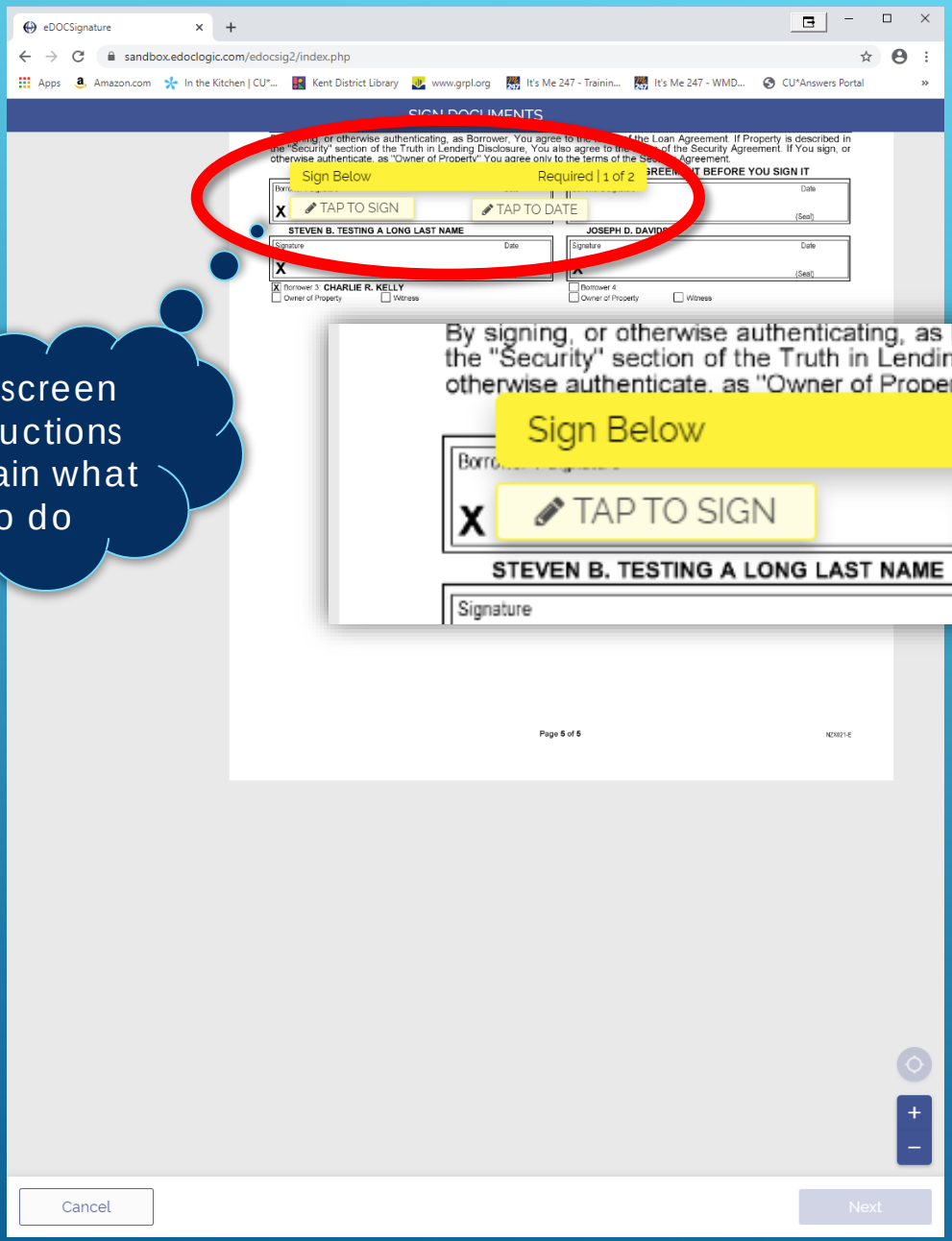
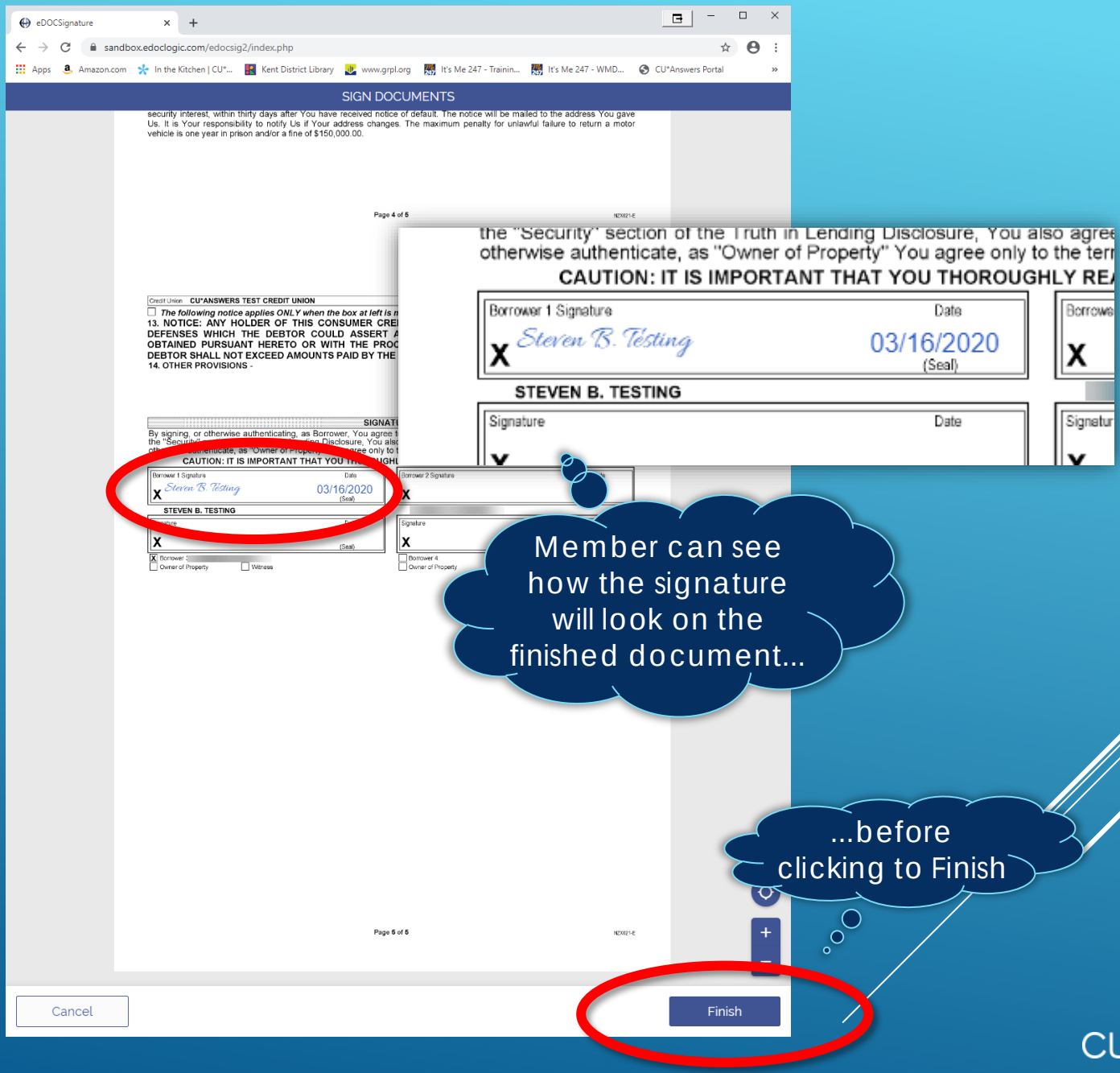
ENHANCEMENTS TO THE CURRENT E-SIGN EXPERIENCE



On-screen instructions explain what to do

ENHANCEMENTS TO THE CURRENT E-SIGN EXPERIENCE



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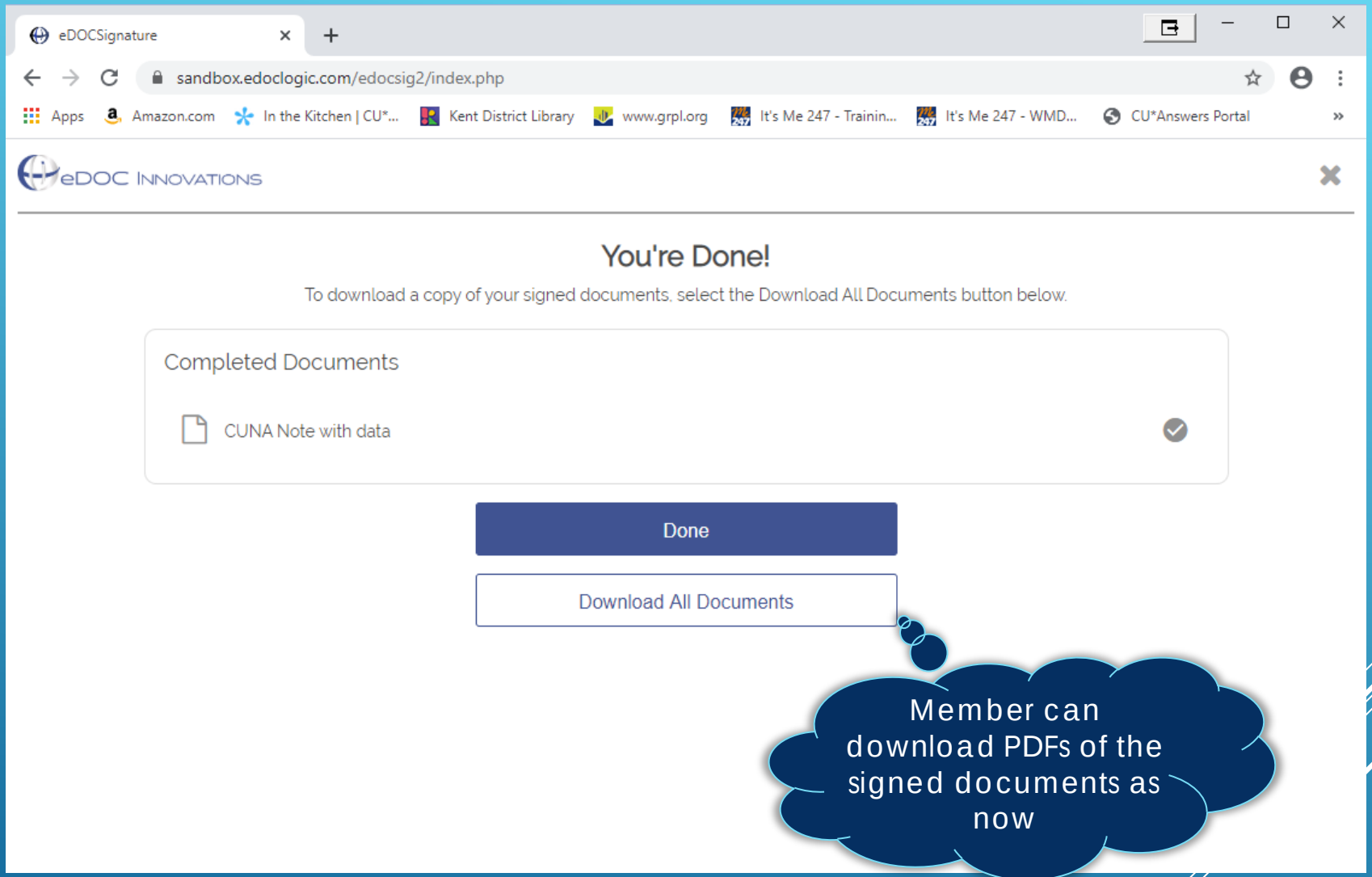

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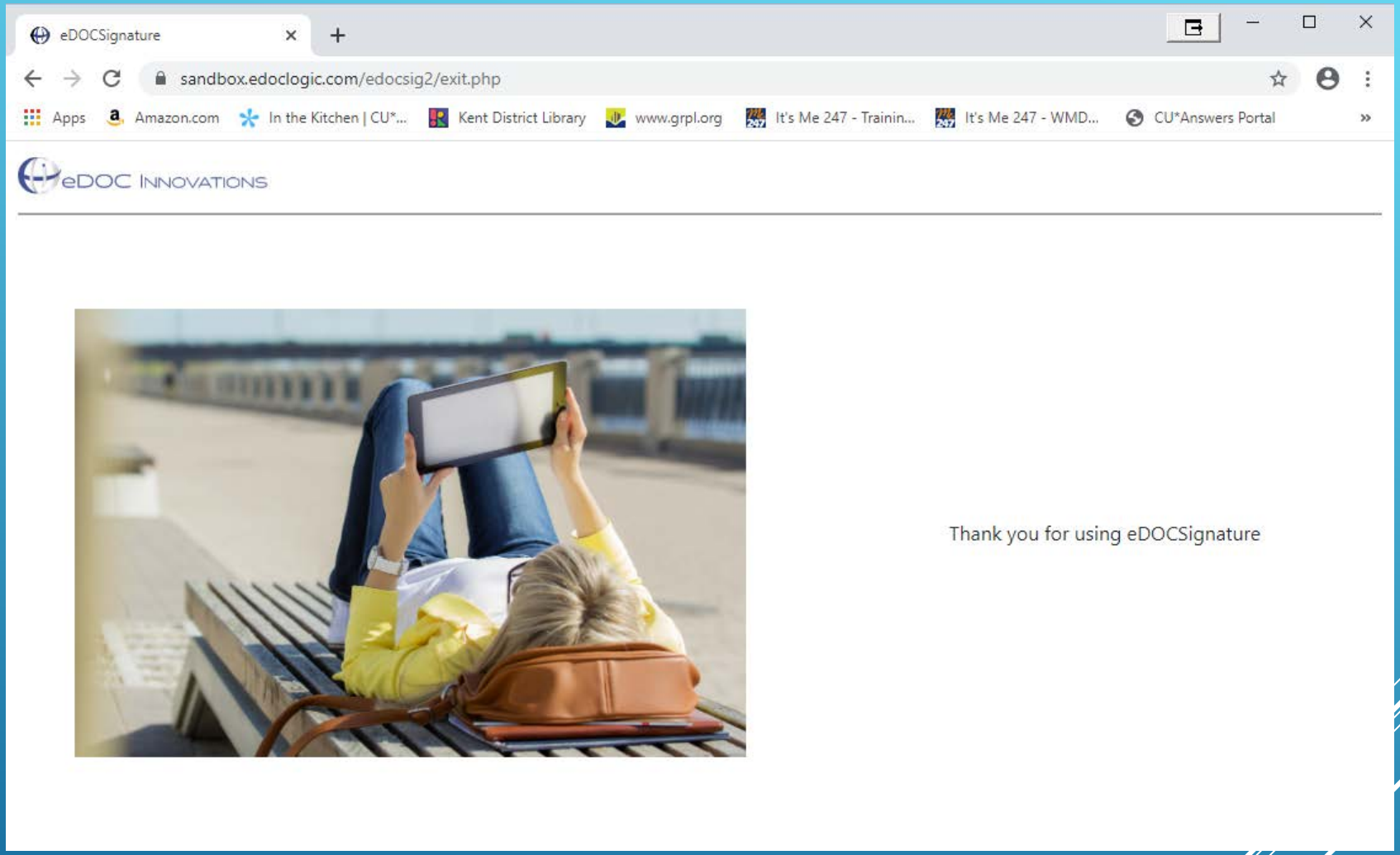

THE VIRTUAL CLOSING ROOM

A NEW E-SIGN EXPERIENCE FOR LOAN DOCUMENTS VIA THE **VIRTUAL CLOSING ROOM** IN **IT'S ME 247** DESKTOP BANKING

It's Me 247 Online Banking

It's Me 247 Mobile Web Banking

Will be implemented with the 20.07 release.

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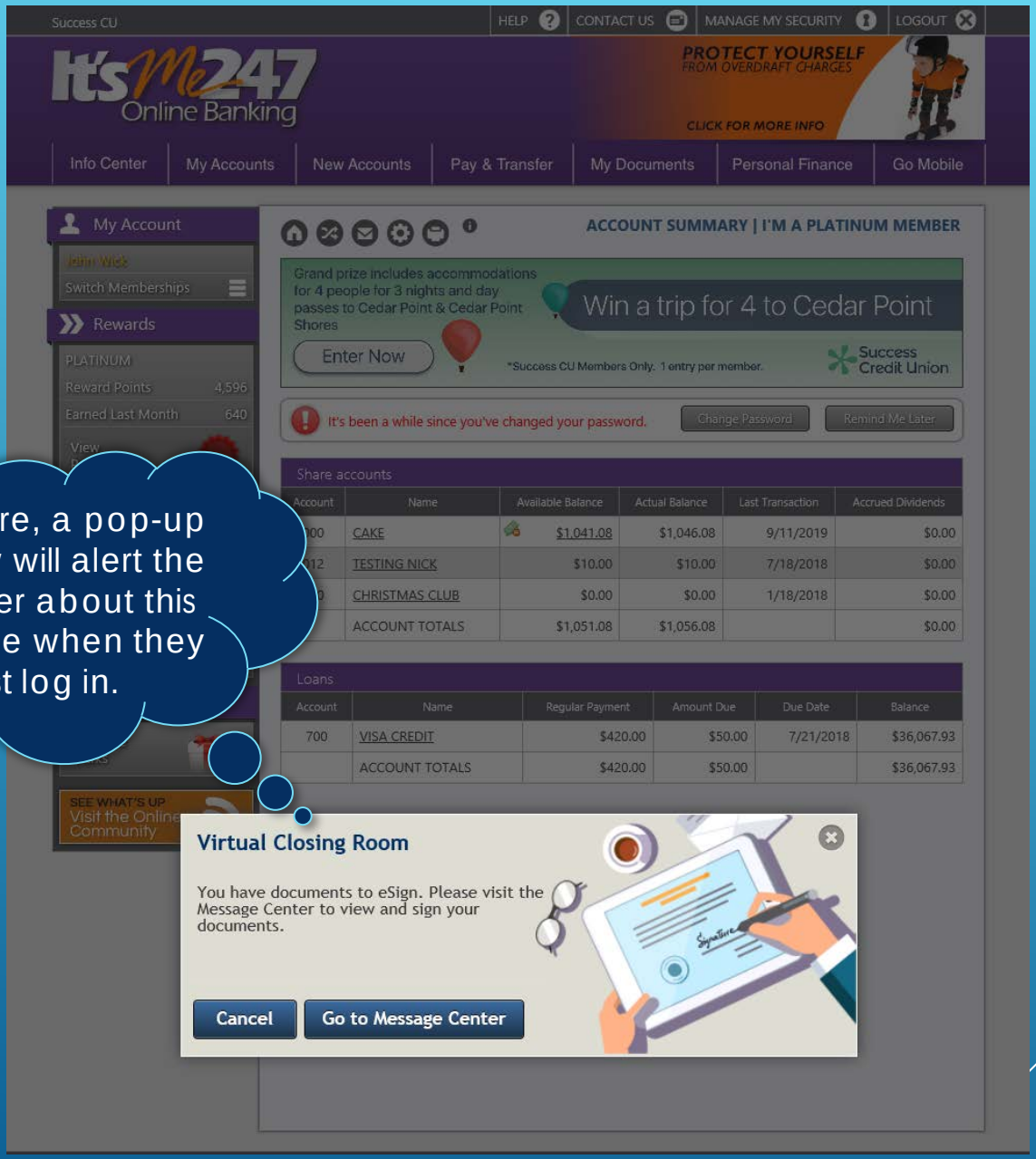
THE IT'S ME 247 DESKTOP BANKING "VIRTUAL CLOSING ROOM"



As before, a pop-up window will alert the member about this message when they first log in.

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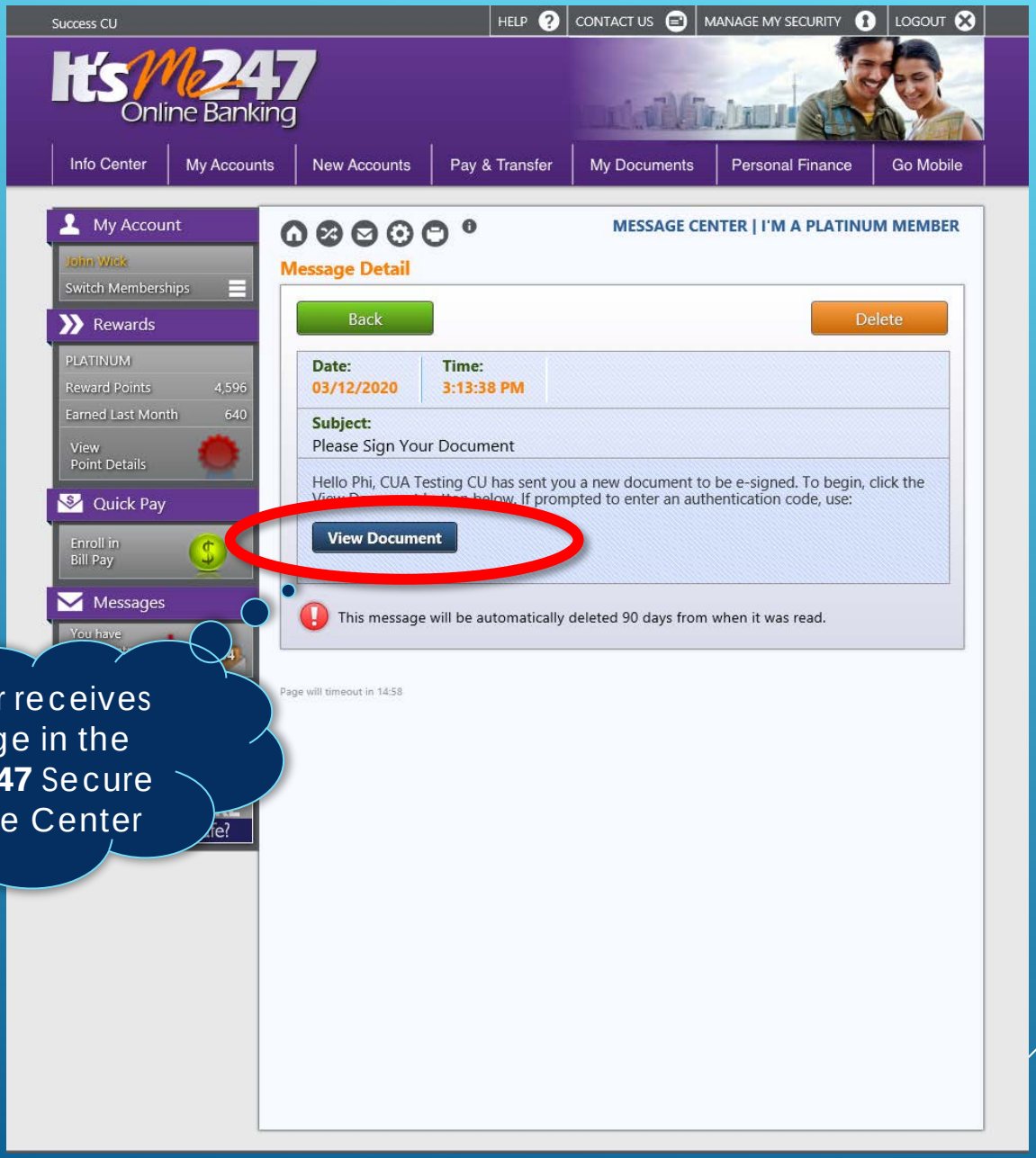
THE IT'S ME 247 DESKTOP BANKING "VIRTUAL CLOSING ROOM"



Member receives message in the **It's Me 247** Secure Message Center

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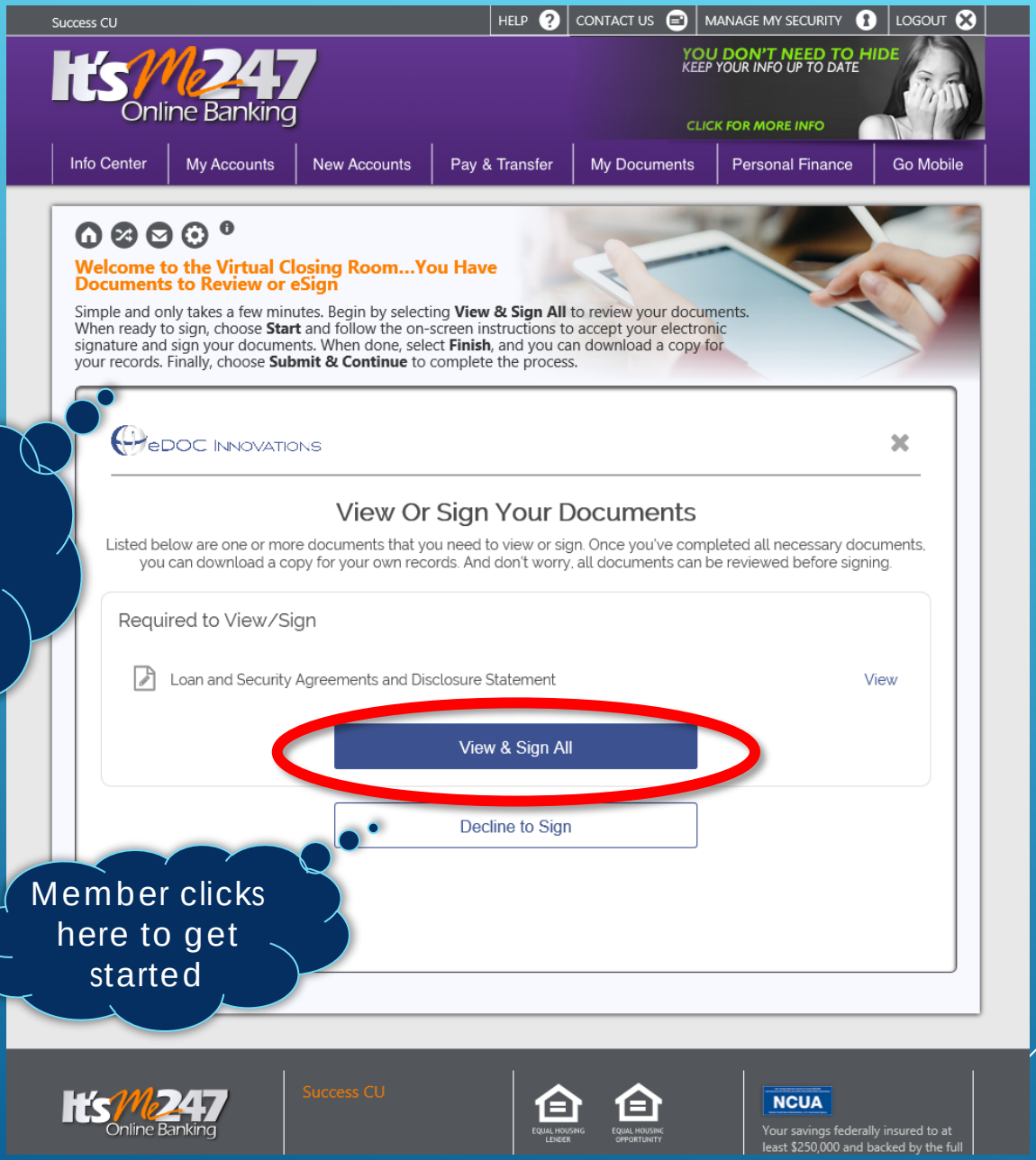
THE IT'S ME 247 DESKTOP BANKING "VIRTUAL CLOSING ROOM"



This intro explains how the e-signing experience will go

Member clicks here to get started

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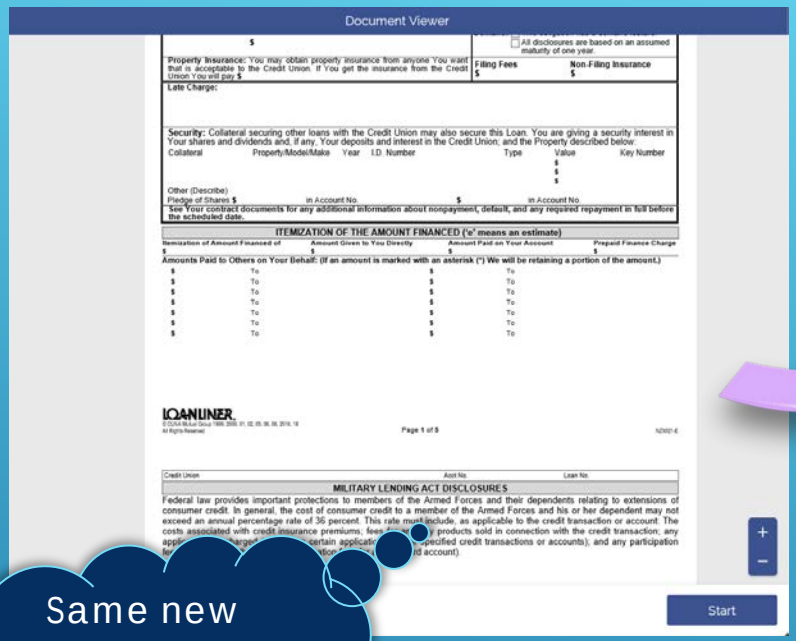
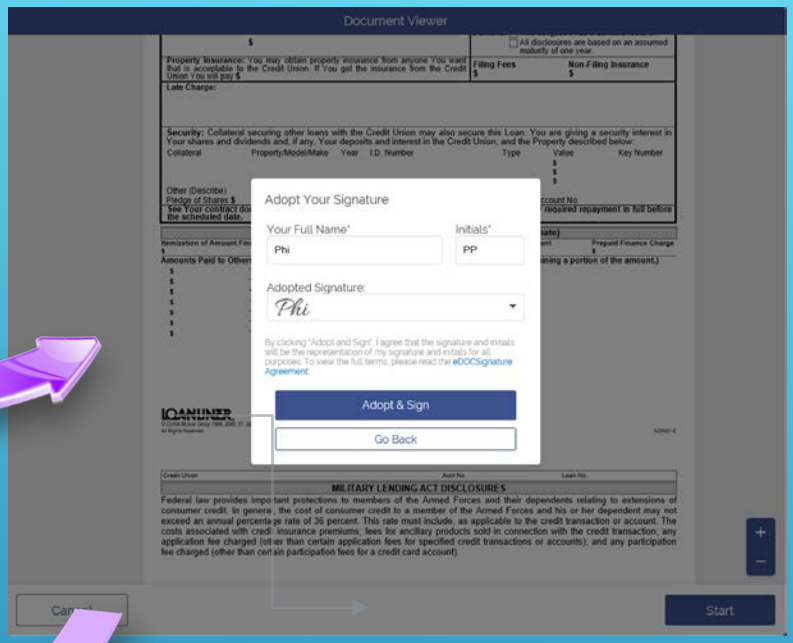
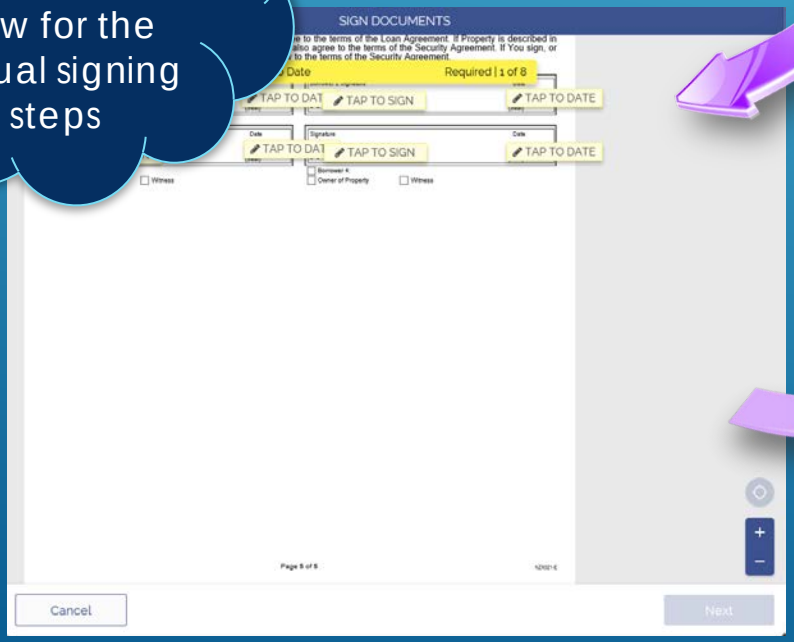
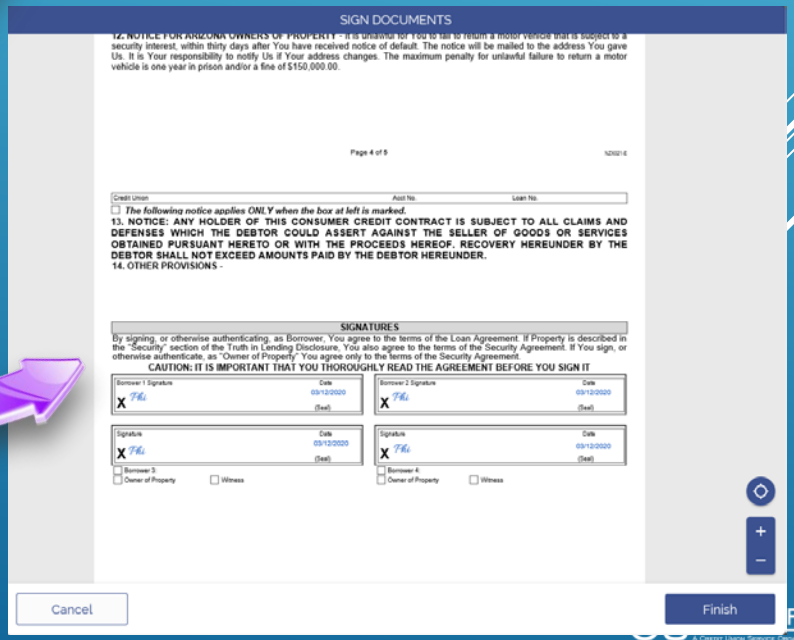
E-SIGNING WHEN OPENING A MEMBERSHIP ONLINE





Same new screens and flow for the actual signing steps





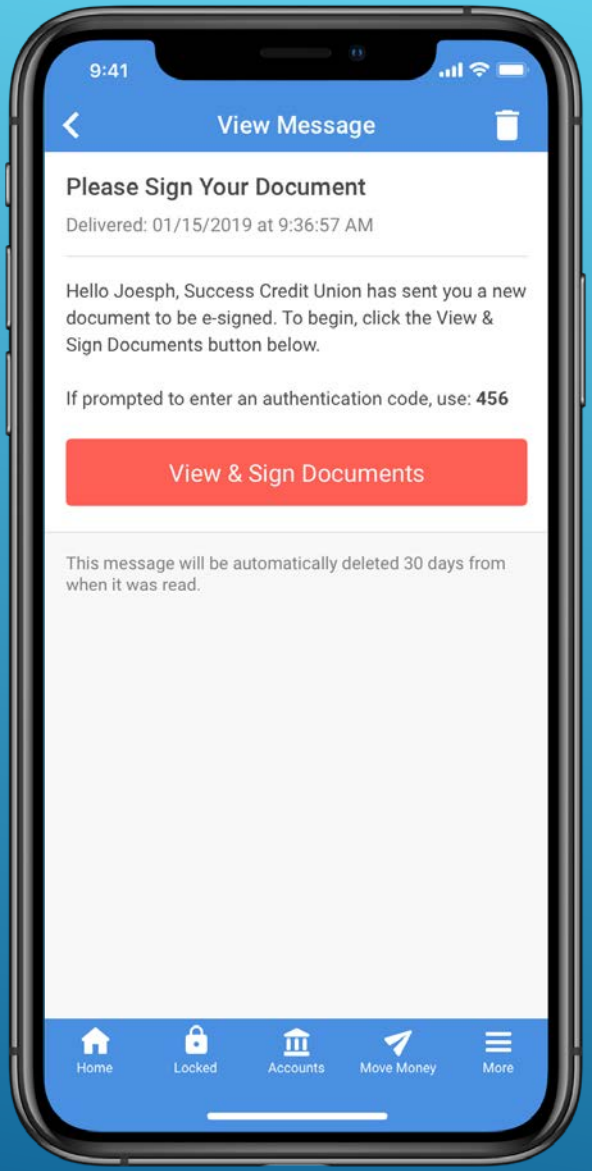
THE IT'S ME 247 DESKTOP BANKING "VIRTUAL CLOSING ROOM"

This button jumps the member back to the message center

TIP: A similar flow will be used by CD-secured loans (coming in 20.10).

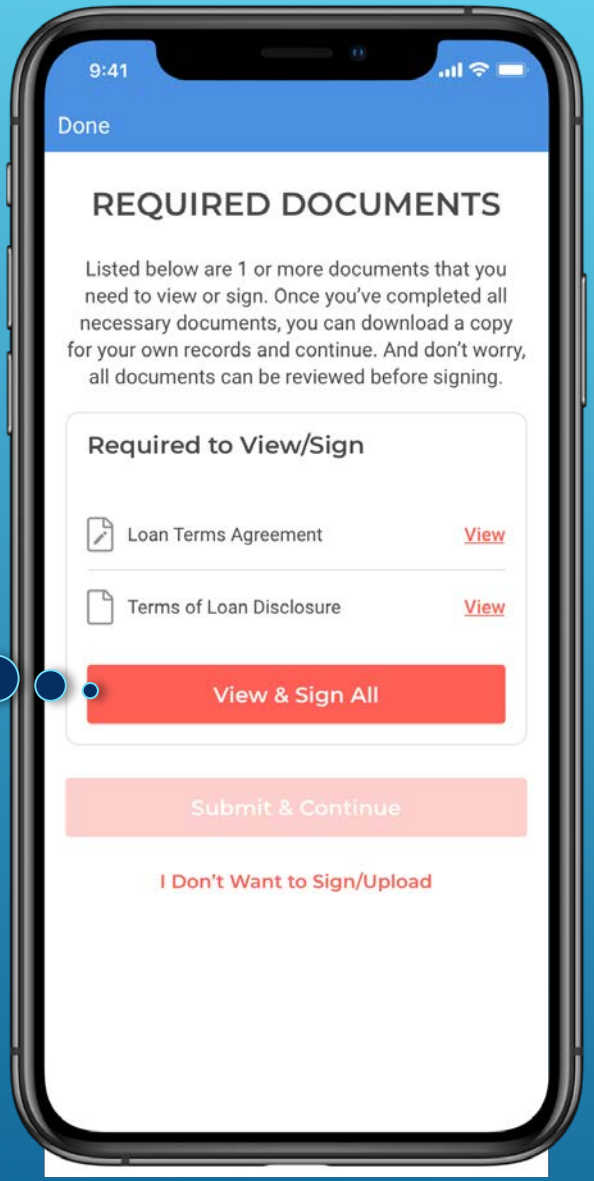
In that case, "Submit & Continue" would proceed to open the new loan and transfer the funds.

NEW E-SIGN EXPERIENCE FOR MOBILE USERS, TOO



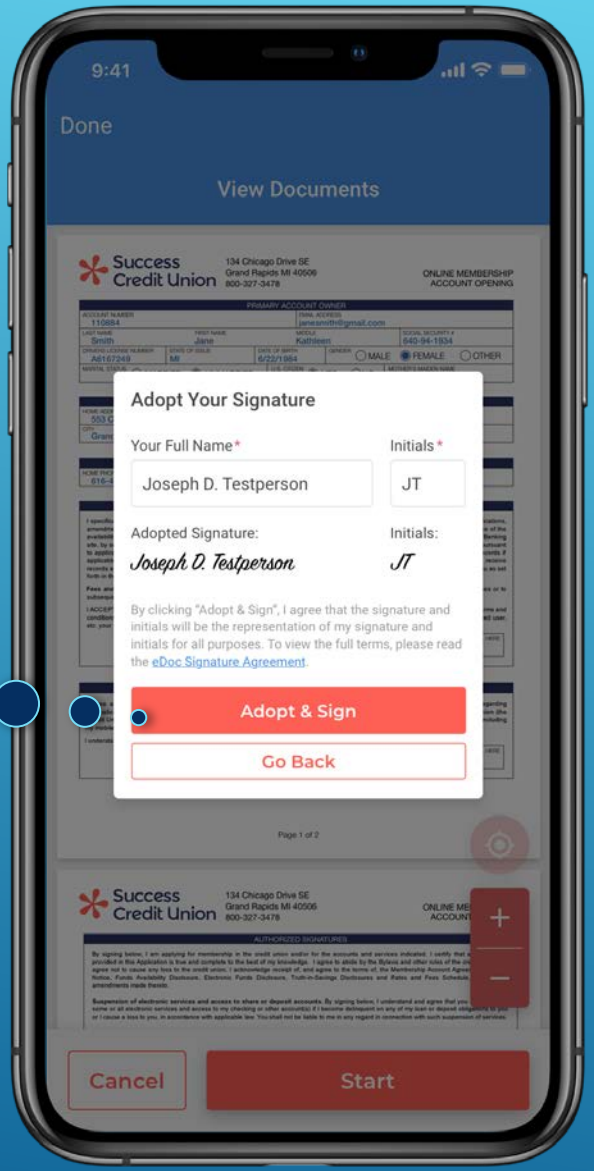
NEW E-SIGN EXPERIENCE FOR MOBILE USERS, TOO

The flow works exactly the same as in the desktop virtual closing room



NEW E-SIGN EXPERIENCE FOR MOBILE USERS, TOO

One-step signature adoption here, too!



NEW E-SIGN EXPERIENCE FOR MOBILE USERS, TOO

Familiar, mobile-friendly zoom and pan controls make it easy to move around the document

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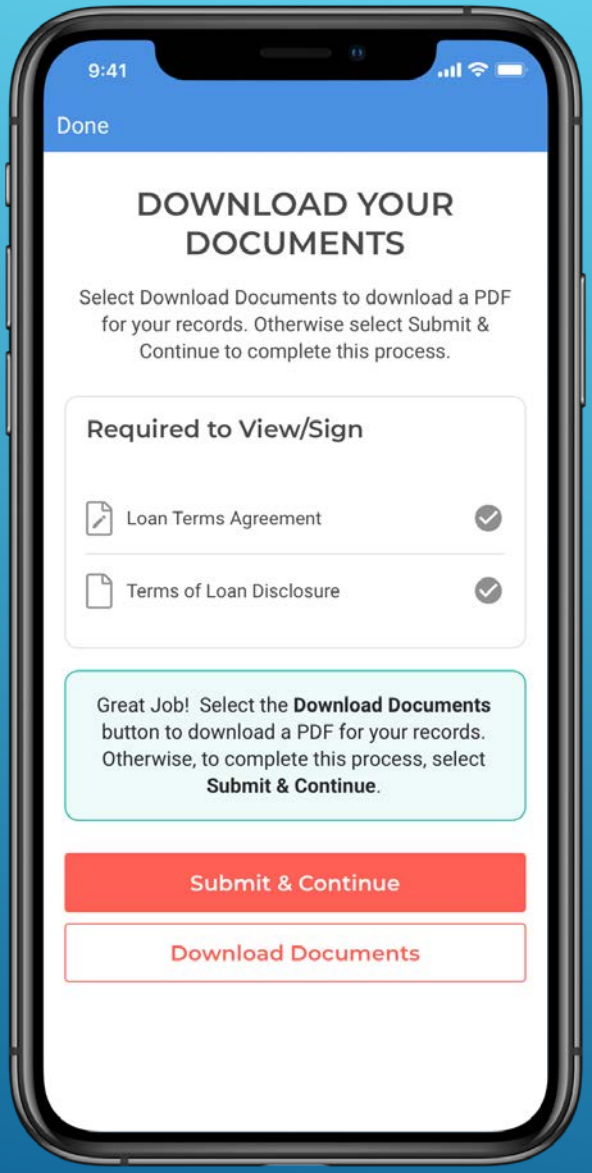
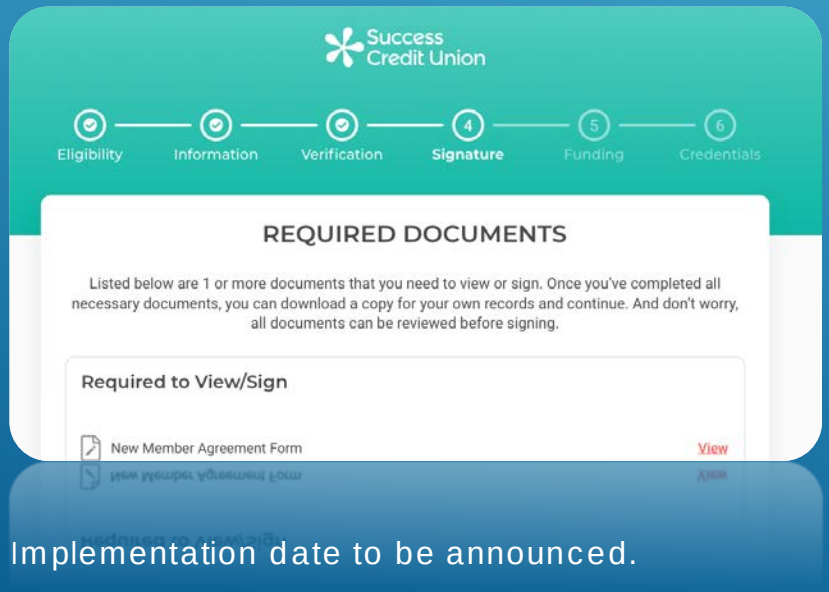
NEW E-SIGN EXPERIENCE FOR MOBILE USERS, TOO



INTRODUCING E-SIGNING FOR MOP

WE'RE ADDING E-SIGNING TO THE ONLINE **MEMBERSHIP OPENING PROCESS**



Implementation date to be announced.

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FORMS CAPABILITIES IN MAP/MOP

CURRENT MAP/MOP FORMS:

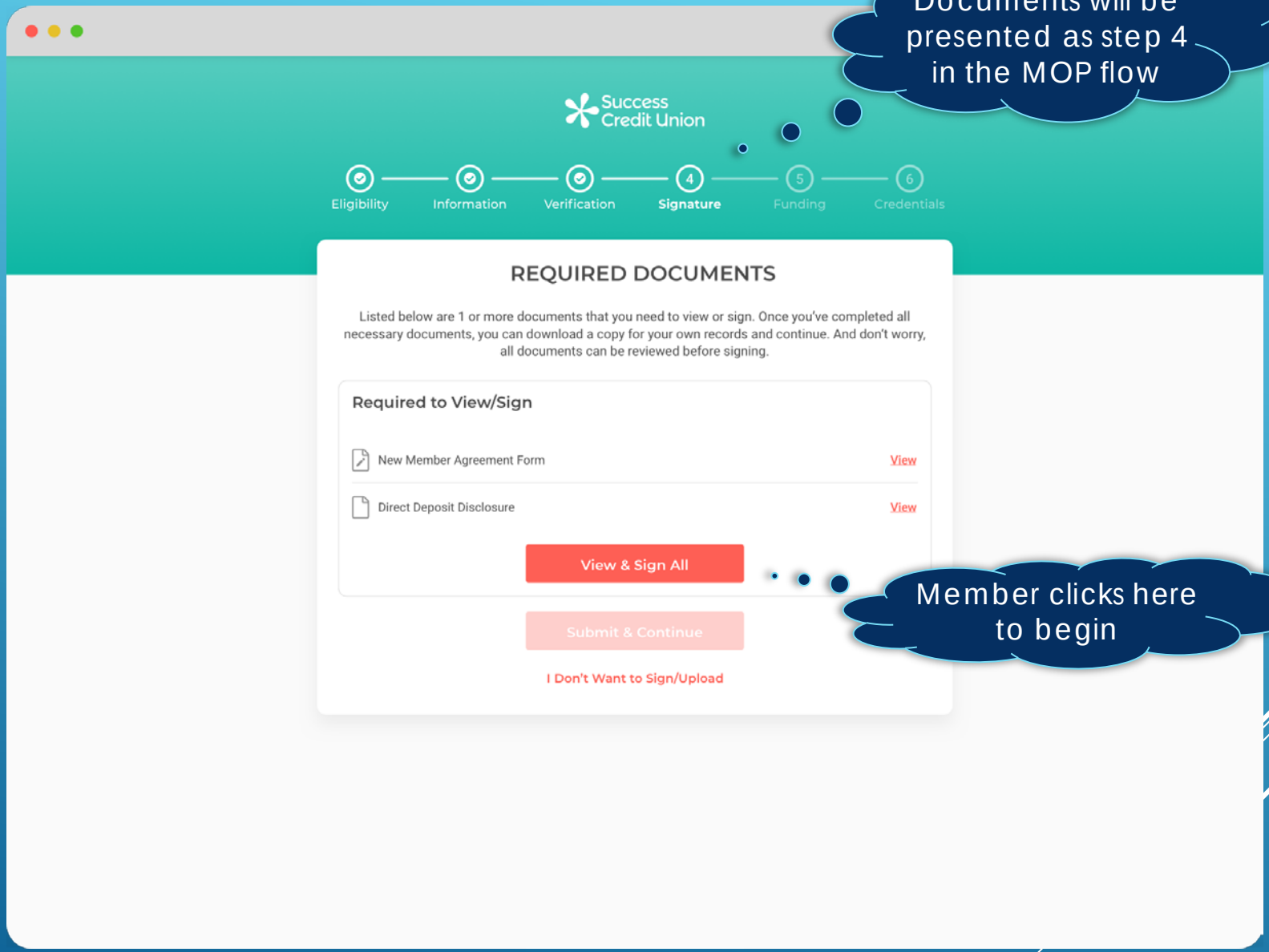
- Created and worked via the Request Center
- Forms do not auto-fill
- No support for collecting e-signatures

NOTE: Request Center forms will continue to be available, and can even be combined with e-sign forms if you wish.

NEW E-SIGNATURE FORMS:

- Programmed using your selected forms by eDOC
- Data is pulled from the MAP/MOP application
- Members e-sign and download forms as part of the MAP/MOP flow
- Completed form is archived in your CU's vault

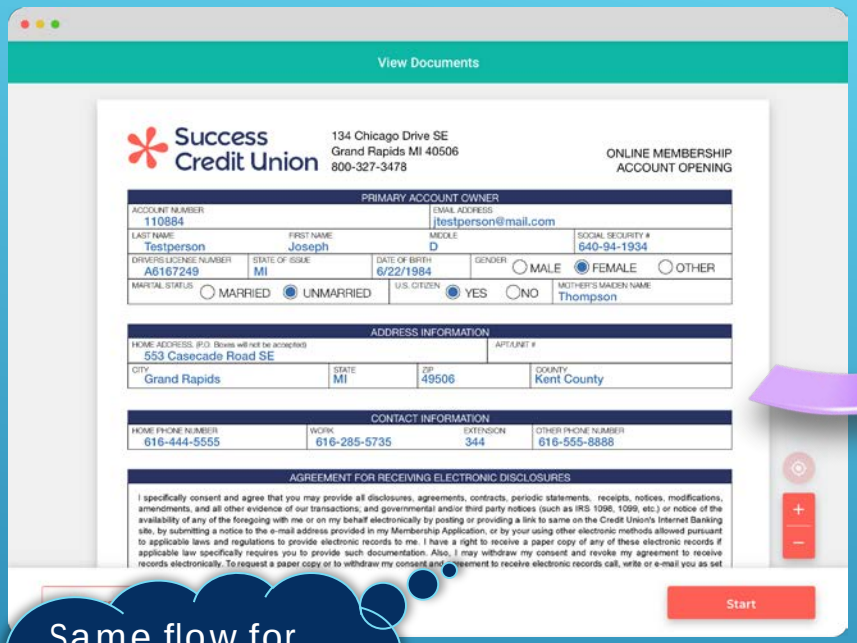
E-SIGNING WHEN OPENING A MEMBERSHIP ONLINE

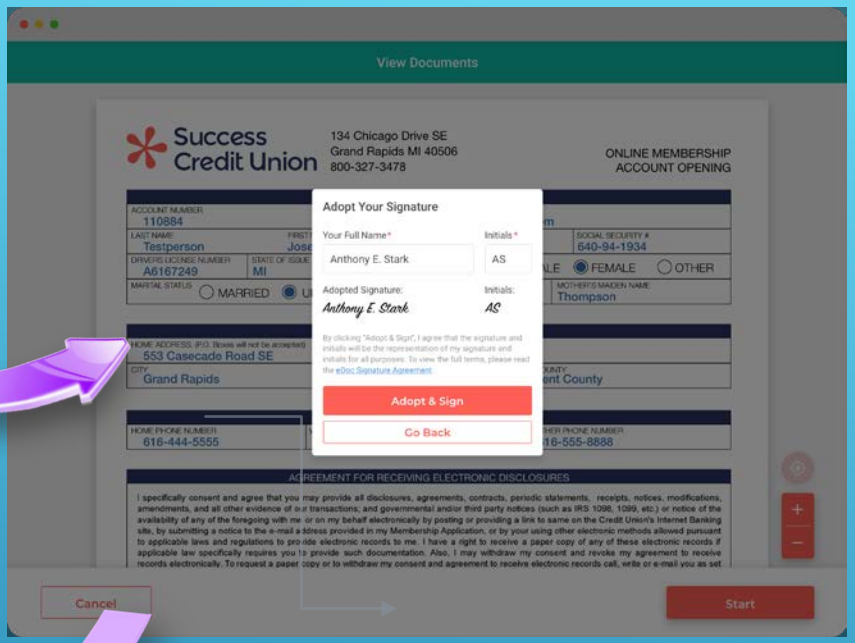


Documents will be presented as step 4 in the MOP flow

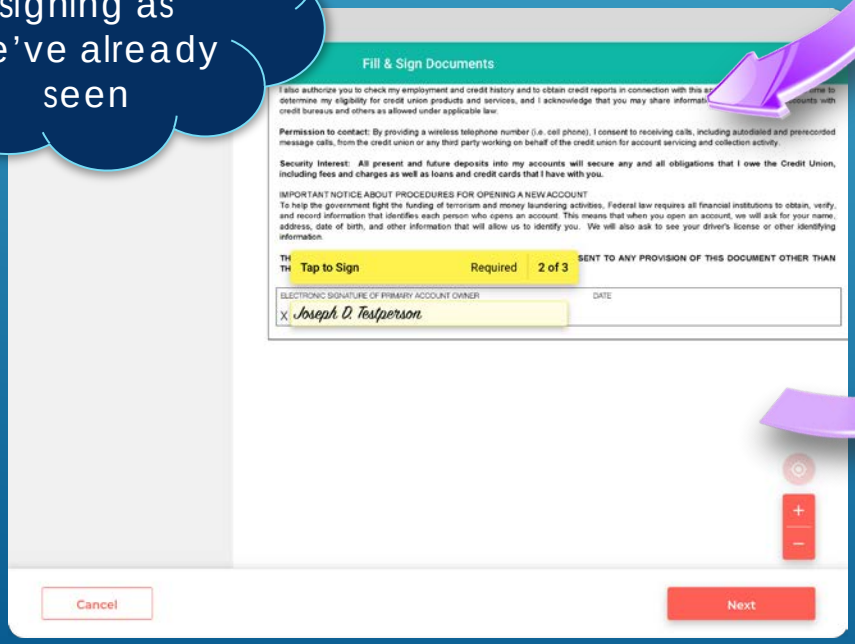
Member clicks here to begin

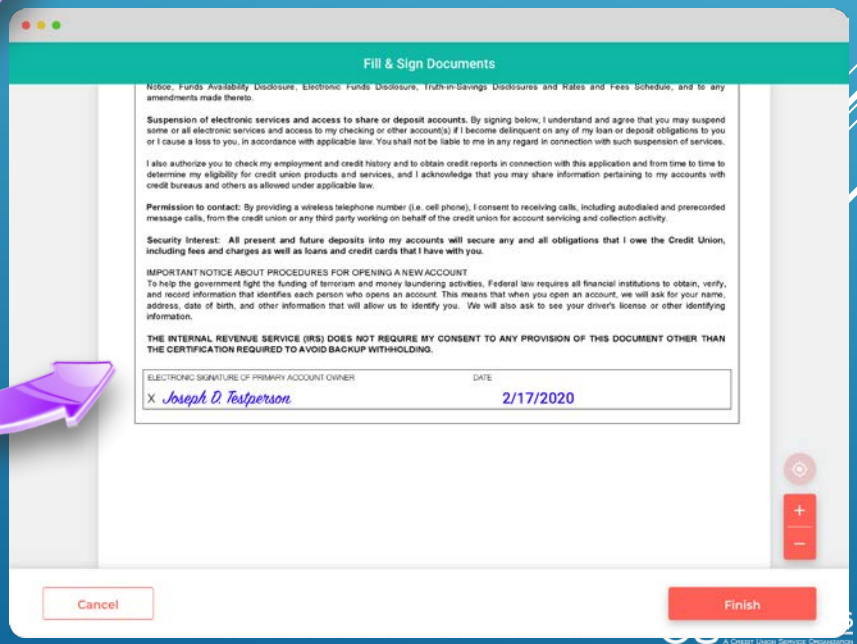
E-SIGNING WHEN OPENING A MEMBERSHIP ONLINE





Same flow for signing as we've already seen





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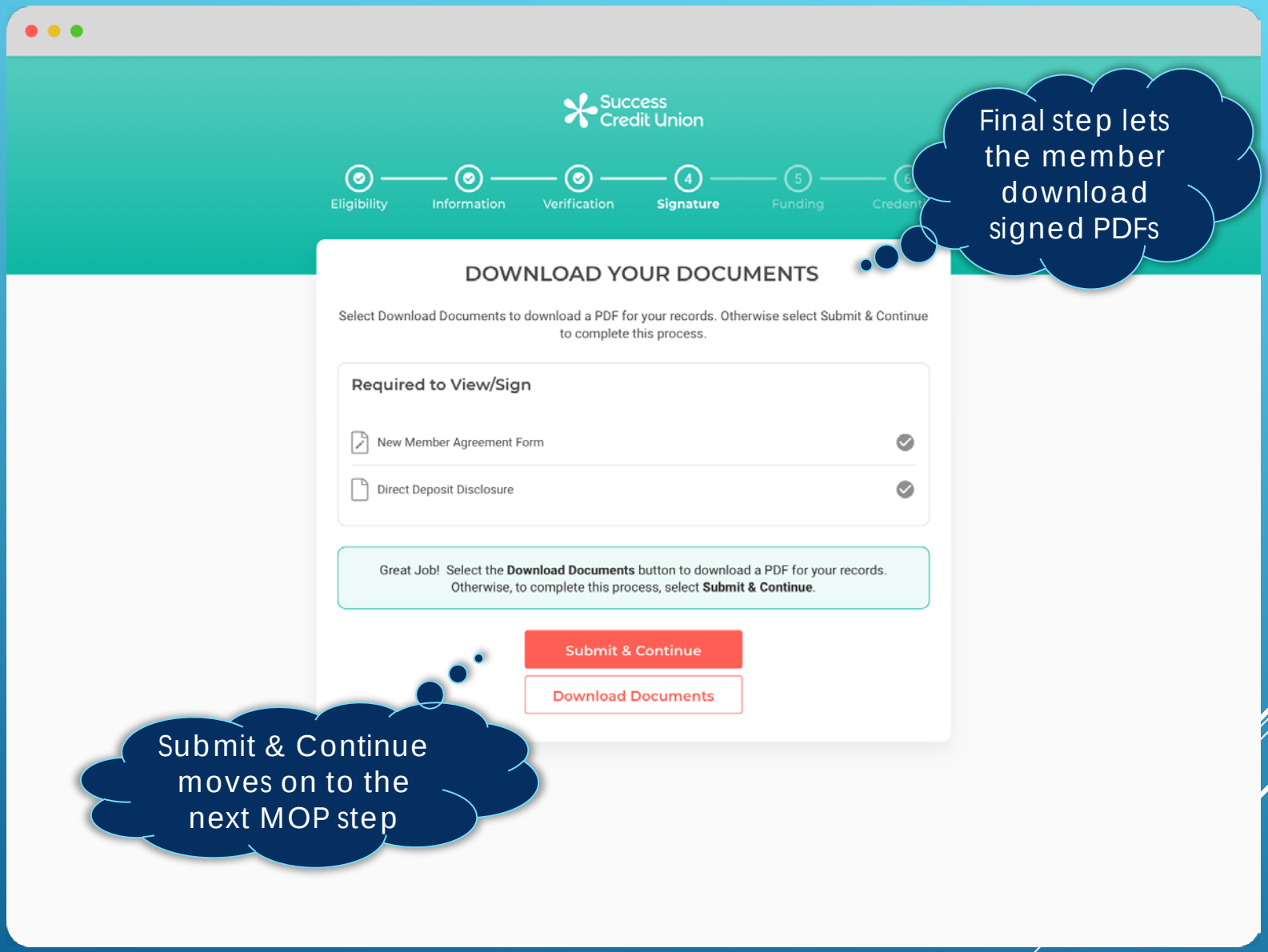

THE ROLLOUT PLAN

WHEN WILL THE NEW EDOC E-SIGN EXPERIENCE WILL BE AVAILABLE FOR YOUR CU?

- New eSign experience for your loan forms via eDOC
  - Beta-testing: Begins mid-March
  - Full release to all CUs: April 20th ??
- New eSign experience via the It's Me 247 desktop banking virtual closing room
  - Beta-test: Begins late March
  - Full release to all CUs: April 29th ??
- New eSign experience via the Mobile 4.0 mobile app
  - Beta-testing: Begins mid-April
  - Full release to all CUs: April 29th ??
- New eSign options for MAP/MOP
  - Beta-testing: Begins late April
  - Full release: To be announced