

Level Four DocuSign

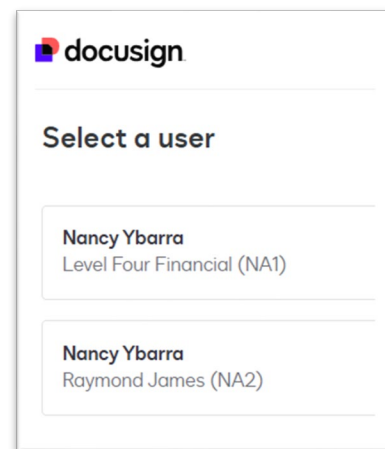
Level Four client paperwork can be sent using the Level Four DocuSign signature system.

NOTE: As a reminder, there are 2 DocuSign accounts – one with Raymond James and one with Level Four.

- Best practice is to access the Raymond James DocuSign via the RJ System. (My Clients: eSignature)
- You can access the Level Four DocuSign via your browser: <https://account.DocuSign.com>.

Depending on how your computer is set-up, you may see both DocuSign accounts as an option when you sign in. Be sure to choose the correct account depending on which paperwork you are sending:

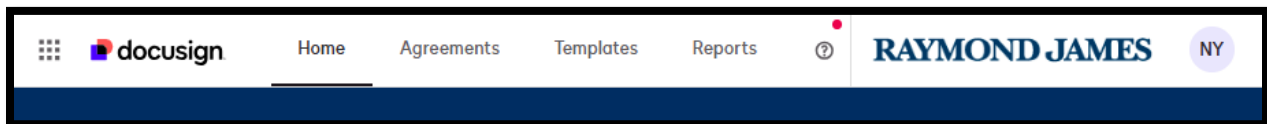
- **Level Four Forms always send using Level Four DocuSign**
- **Raymond James Forms always send using RJ DocuSign.**



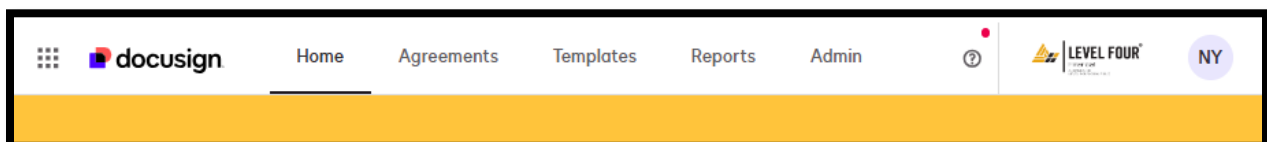
How do you know which DocuSign account you are in?

- The Raymond James DocuSign shows the name in the header at the top of the page.
- The Level Four account has Level Four branding in the header.

JAMES RAYMOND HEADER:



LEVEL FOUR HEADER:



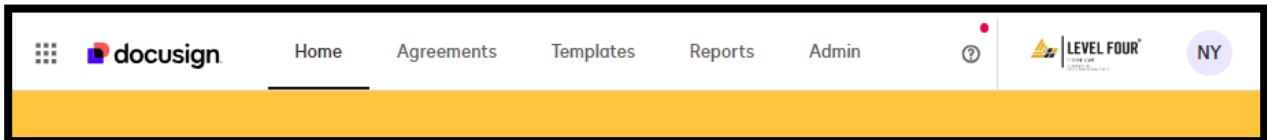
Level Four DocuSign Process:

Level Four DocuSign Using Templates –

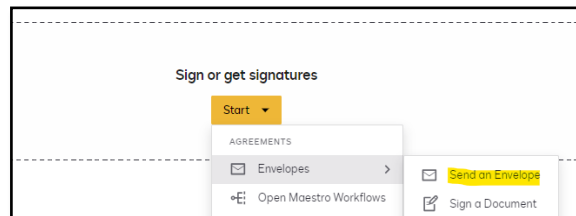
- Complete a Level Four Form (PDF) offline and save to your computer
- Upload completed PDF to Level Four DocuSign envelope
- Apply a DocuSign template
- Template adds boxes for required recipients
- Template ensures Multi-factor Authentication, which is required for clients using LFF DocuSign
- Add Recipients
- NO EDITING to form once it's in DocuSign
- Send to client for signatures

LEVEL FOUR DocuSign – Use prefilled PDF. No editing in DocuSign

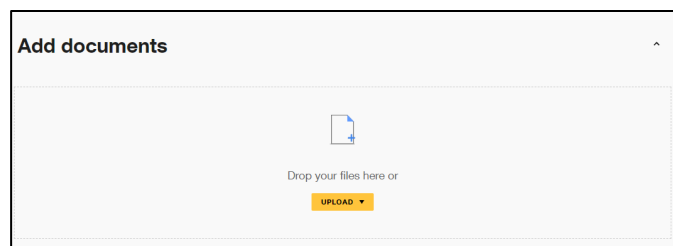
1. Download most current version of a Level Four form from the Level Four Intranet (harborfs1.com).
2. Complete the Level Four form (PDF) and save to your computer
3. Open Level Four DocuSign
4. Navigate to Home



5. Go to Start > Envelopes > Send an Envelope

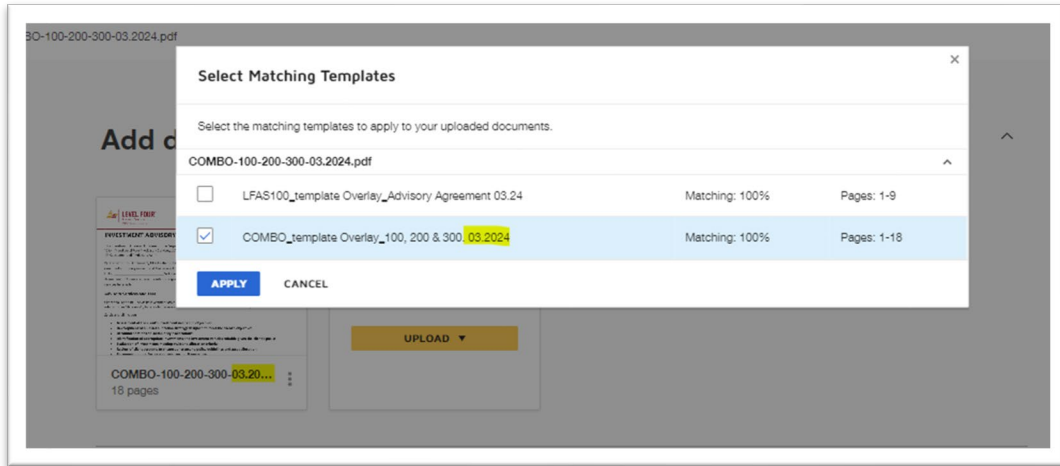


6. Add documents
 - a. Drag completed Level Four PDF form(s) to upload. (or browse your computer to find document)



Level Four DocuSign Process

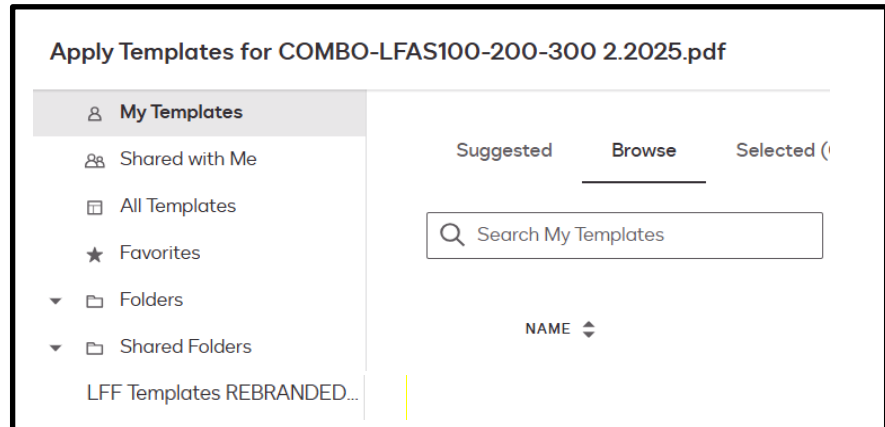
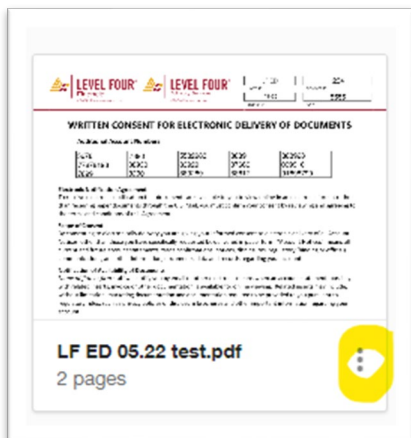
7. Pop-up screen will appear – **“Select Matching Template”**
 - a. Select the correct template to match the PDF.
 - b. Click Apply




NOTE: A matching templates window should pop-up. If not, you may need to change your settings. See note on last page to make the templates apply automatically.

The template version date should match the date on the PDF. If not, you may be using an outdated PDF form. Latest versions of all forms can be downloaded from the Level Four Intranet.

8. If a Template Pop- up screen does NOT appear:
 - a. Click the 3 dots on the right side of the form
 - b. Select “apply template”
 - c. Under Shared Folders, open folder “LFF Templates REBRANDED
 - d. Check the box by the correct template and click Apply Selected

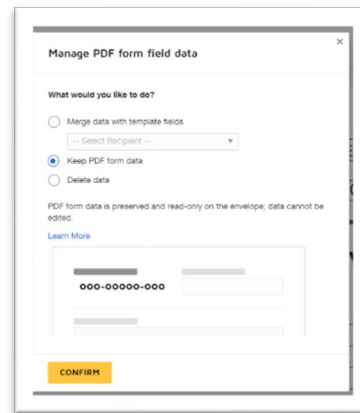


Level Four DocuSign Process

9. **Repeat Steps 6 and 7** for additional documents. You can send multiple documents at one time.
10. **Add (and/or Delete) Recipients** to the Envelope
 - a. The template will add boxes for required recipients
 - i. Add recipient information
 - ii. If a recipient is not needed, you may delete by clicking on  the on the right side.
 - b. A mobile phone must be added for Clients to allow for multi-factor authentication (text code sent to client's cellphone)
 - c. A copy is coded to be sent to newaccounts@levelfourfinancial.com
11. **Review Message** to recipients
 - a. A message is pre-filled but you may change if preferred.
 - b. The client's name should start the subject line. This is pre-filled by the system.
 - c. If document is not going to a client, you will need to add the client's name to the subject line.

12. Click **NEXT**

13. **Confirm PDF data**
 - a. Select "Keep PDF form data"
 - b. Click Confirm



14. **Review** document prior to sending

If the data is not correctly fitting the form, you may be using an outdated version of the PDF. The template date should match the date on the PDF. Latest PDF versions are available on the Level Four Intranet.

Ready to send? – Click **SEND**

Not ready to send? – Click **ACTIONS** (top right-hand corner). Choose **SAVE AND CLOSE**

The envelope will be stored in your DocuSign Draft folder until you are ready to send

Would you like Automatic Template Matching? – Update your settings!

- On your DocuSign Home page, go to your profile (round circle on right side)
- Select: My Preferences
- Under Signing and Sending, select Template Matching
- Check: Match templates to uploaded files
- Choose: Notify me of matching templates
- Match sensitivity level - type "80".
- Click **SAVE**