Questionnaire for eSign Documents

Revised January 2019

© 2019 IMM All rights reserved

Objective:

The questionnaire explains all items that should be considered before starting to create documents for eSign. If IMM will be designing your documents, it is required that IMM receives the completed questionnaire followed by a signed proposal. If you have any preferences or questions, enter them under each item respectively. If your Financial Institution (FI) has opted to prepare eSign documents in-house, IMM recommends that you go through this questionnaire carefully to review all important considerations. If needed, a project Manager can schedule a call to discuss the questionnaire.

1. Required Software and Training to Design eSign Documents:

The FI requires the following software if the FI has opted to prepare or maintain eSign documents in-house. IMM provides an LiquidOffice Forms Designer Document Preparation Training Class. The class size is limited and will be filled on a "first come, first serve" basis. If the FI decides to attend the training class, please update your project Manager.

- LiquidOffice Forms Designer
- JSCodeGenerator
- Field Data Dictionaries
- LiquidOffice Forms Designer - Training Manual

The class is two full days. The first day will include training on creating documents in LiquidOffice Forms Designer with attendees designing and fielding documents, including best practices for customizing and building form design concepts.

The second day includes information on how to set up dynamic intuitive document selection, signature fielding for in-branch and remote signatures, adding objects in the Java Code Generator, importing pre-existing PDFs, a demonstration of document conversion and the AFD Lab showing attendees how to utilize the Expression Builder/JavaScripting. Attendees will receive a thumb drive with expressions and JavaScripting examples of practical applications that existing financial institutions have used to streamline document processing. The entire training class is hands-on and features a technical and operational review of "How To" which is a necessity for credit union personnel that plan on creating or maintaining documents for eSign and/or Document Exchange.

Preferences or Questions:

2. Collecting and Creating eSign Documents Using Various Types of Source Files:

Each document can be categorized as either a "Proprietary (designed by CU)" or "3rd party" document. The source file of each document may be available in a different electronic file format. The recommended electronic files are fillable PDF, DOC, XLS or IFD (listed in priority order.) Each eSign document MUST be recreated using LiquidOffice Form Designer. eSign only accepts the fillable PDF generated by LiquidOffice Forms Designer. XFM is an extension of the document created in AFD.

Four methods of creating an XFM from fillable PDF, DOC, XLS or IFD:

1. AFD documents can be converted from fillable PDFs, DOC, XLS or IFD using the IMM Conversion Utility. The conversion tool is available free of cost for an FI. The FI needs to purchase conversion pages. The text/design of the document remains *editable* in AFD. It allows text/design changes. Fillable fields can be added using AFD. It is the most convenient option for proprietary document since the FI should be able to change the text/design of the document using AFD.
2. AFD documents can be created via importing the fillable PDF files directly into LiquidOffice. The text/design of the document remains un-editable in AFD. Fillable fields can be added using AFD. It is the most convenient option for 3rd party vendor documents since the FI MUST not make changes to text/design of the document.
3. AFD documents can be created by copying text from source files like fillable PDFs, DOC, XLS or IFD and pasting the text.
4. AFD documents can be created from scratch. If the FI cannot locate an electronic file that can be imported or converted this remains as the only option.

© 2019 IMM All rights reserved

IMM's design standards for creating proprietary and 3rd party vendor documents:

- Proprietary Documents: IMM converts proprietary documents using a conversion tool so the document can be editable for future text/design changes. After conversion, some text alignment or the overall document layout may shift a bit. During the cleanup process of the document, IMM ensures that the document created in AFD matches the source file as close as possible. The document will go through a review process at IMM. In addition, the document MUST be proofed by the customer within the warranty period (see "Electronic Documents Warranty Period.")
- 3rd Party Vendors Documents: The majority of vendors are providing fillable PDF files. Some of the vendors may provide the source files in XFM format. IMM imports the fillable PDF into AFD and adds fillable fields onto the document as necessary.
- Future replacements of 3rd party vendor documents: For future updated documents (sent by a third party vendor), IMM or the FI can re-import the updated PDF - the field mapping can be copied from the old XFM onto the new XFM.
- Space for e-Signature Fields: Since the 3rd party vendor document will be non-editable in AFD, there should be enough space for electronic signatures. If the 3rd party document does not meet the specification for electronic signatures/initials, IMM will supply the PDF back to the vendor and ask them to make appropriate space. The FI may provide these two tables to their 3rd party vendor to explain the minimum height and width requirements for electronic signature and initial fields.
- Signature Field Height and Width

Signature Pad Size	Signature Height (inches)	Signature Width (inches)
4 x 5	0.4	1.2
1 x 5	0.4	1.2
Important: For all signature pads, the signature box width on the form should not be more than 3 times its height		

- Initial Field Height and Width

Signature Pad Size	Signature Height (inches)	Signature Width (inches)
4 x 5	0.263	0.617
1 x 5	0.263	0.617

FI to provide LATEST source files:

The FI or your 3rd party vendor needs to supply the LATEST electronic source documents (.IFD or .Doc or .PDF). IMM will assume that your supplied source documents have accurate spelling and design. If the FI requires any design changes on 3rd party vendor documents, IMM requires written permission from your 3rd party vendor. There will be an extra charge** if the FI would like IMM to make design changes or the 3rd party vendor provides updated source file after IMM has finished creating documents.

☐ I have confirmed that IMM has received the latest source files from my FI and 3rd party vendor.

Preferences or Questions:

© 2019 IMM All rights reserved

3. Expectations of Field Mapping:

Certain field mappings are unique to the FI's business needs and system values which can be configured during the revision process. IMM tries their best to map fields on the document so they can automatically pre-fill data from the FIs host system. Following are some scenarios where IMM and the FI will work together during the testing phase of the document to take care of FIs unique business needs.

- If the designer cannot easily identify legal terminology on the document, the mapping for these fields may have to be revised.
- Certain fields' mapping depends on the configuration of the Descriptions.txt file (if applicable to your system).
- The FI may require default values for some specific fields.

Preferences or Questions:

4. Document Testing Training:

The Project Manager schedules training for Document Testing. This is scheduled once the host connectivity is confirmed with eSign. This training covers all significant items in respect to the eSign documents. that will expedite and helps the workflow of testing documents.

Preferences or Questions:

5. Document Set or “Package of Documents”:

eSign allows you to process more than one document as package simultaneously. eSign also allows creating document sets (packages of documents) in advance, based on product type. IMM does not create grouped documents. Individual documents can be used in multiple document sets which is controlled within eSign. Review the “Documents list” to ensure that the FI has not placed an order for grouped documents.

☐ I have confirmed that none of the Documents are to be created as a “Grouped Document”

Preferences or Questions:

6. Lending/Account Origination Platform and the system name:

Each document can be processed AND mapped to pull data from only one platform, Account Origination OR Lending. IMM has developed separate field data dictionaries specific for each platform. Enter the platform (Account Origination OR Lending) name in “Documents List” followed by its system name. There will be an extra charge** if the FI would like IMM to change mapping after IMM has finished creating documents.

☐ I have entered the platform-system name for each eSign document.

Preferences or Questions:

© 2019 IMM All rights reserved

7. Duplicate Documents:

Each eSign dictionary type is associated with host system platforms - Account Origination OR Lending. If the document needs to be processed from two different platforms (Account Origination and Lending) then there MUST be two copies of the same document created for each platform. This is because each eSign document can only be uploaded under one dictionary type. Some documents may require two copies so each copy has different field mapping or the way its processed is different - For such documents, IMM uses the term "Duplicate Documents". Here are some of the scenarios where duplicate documents are created:

Duplicate documents need to be mapped from each platform and uploaded into the respective eSign dictionary.

Duplicate documents may need to be mapped for the same dictionary type.

Duplicate forms need to be mapped for each dictionary and uploaded in eSign respectively.

Example: Line-Of-Credit-Voucher-Lending and Line-Of-Credit-Voucher-Membership .

- Once the Line-of-Credit is approved from the Lending department, the form (Line-Of-Credit-Voucher-Lending) can be processed from the lending platform. "Line-Of-Credit-Voucher-Lending" is mapped using lending field data dictionary. "Line-Of-Credit-Voucher-Lending" should be uploaded under your lending dictionary type.
- Yet, if the member decides at a later time to withdrawal additional funds from the Line-of-Credit, then the same form (Line-Of-Credit-Voucher-Membership) may be processed from membership platform. "Line-Of-Credit-Voucher-Membership" is mapped using membership field data dictionary. "Line-Of-Credit-Voucher-Membership" should be uploaded under your membership dictionary type.

Duplicate form may need to be mapped using one dictionary to support special requests.

Example: Pay-off-letter-1, Pay-off-letter-2, Pay-off-letter-3

On a personal loan application, when debts are consolidated for multiple creditors then each creditor should get a payoff letter

- Pay-off-letter-1 will be used to process the first creditor.
- Pay-off-letter-2 will be used to process the second creditor.
- Pay-off-letter-3 will be used to process the third creditor.

Example: Loan-Application-Guarantor and Loan-Application

On a loan application where guarantor is included, your FI may require a separate loan application to be generated and processed for the guarantor.

- Loan-Application-Guarantor will be used to be process ONLY for guarantor
- Loan-Application will be used to be process primary applicant and/or spouse and/or co-applicant.

Preferences or Questions:

8. Documents for Guarantor/Co-Make/Cosigner:

Co-Make/Cosigner/Guarantor -- these are different titles used for the same type of borrower added to the loan. Usually there are specific forms that this type of borrower has to sign upon closing the loan. In this document, we are using Guarantor for our explanation.

Usually Guarantors data has to auto populate onto documents like the loan application, guaranty agreement and notice to cosigner. IMM always ask this MUTUALLY EXCLUSIVE question to all financial institutions so the eSign documents can be set based on the answer.

Do you have guarantor specific forms? OR Do you want all forms to be processed for the guarantor?

☐ Do you have guarantor specific documents? If yes, list all Guarantor specific documents.

OR

☐ Do you want all documents to be processed for the guarantor?

Specific document names for the Guarantor:

Preferences or Questions:

© 2019 IMM All rights reserved

9. Special Lending Documents that Require Duplicate Forms

- Adverse Action Notice
- Risk Based Pricing (RBP) Notice With or Without Score
- Account Review Notice
- Fact Act Notice

For above listed documents, your forms vendor may have pages for “borrower copy” and duplicate pages for “additional borrower copy” within the same document.

The history behind the setup of the documents is below:

The Federal Reserve Board (FRB) and the Federal Trade Commission issued final rules to implement the credit score disclosure requirements of the Dodd-Frank Act. If a credit score is used in setting material terms for credit products (e.g. car loans, line of credit, home loans) or in taking an adverse action on lending products or deposit products (e.g. Share Draft Account or Debit Card), the statute requires creditors to disclose credit scores and related information to consumers in notices under the Fair Credit Reporting Act (FCRA).

For such documents, IMM recommends to create separate documents for each type of borrower. A document should be mapped for each borrower type that is supported by your host system a document for borrower, a document for co-borrower (spouse), a document for co-borrower (non-spouse), a document for co-borrower (guarantor). Each borrower type is assigned with a specific party prefix - A_ for primary, C_ for spouse, GA1_ for Guarantor.

Here is why IMM suggests separate documents for each borrower type for the above listed documents.

Advantages of Separate Document for EACH Borrower Type:

- Using the criteria, the Spouse Copy, Co-borrower Copy or Guarantor Copy can be added to the document set.
- Using the criteria, the “RBP Notice with Score” or “RBP Notice with NO Score” can be selected ex: primary has a credit score but co-borrower doesnt have the credit score.
- If using “Remote Signature” the documents are be separated so Primary applicant will NOT see co-borrowers credit score and Co-Borrower will NOT see Primary applicants credit score.

Disadvantages of Document that Includes “Additional Borrower Copy”:

- If the loan has only primary applicant then the page(s) designed for additional borrower will be archived as well. The form CANNOT be customized to remove the pages for additional borrower.
- The “RBP Notice with Score” or “RBP Notice with NO Score” will be printed with additional pages for scenarios like primary has a credit score but co-borrower doesnt have the credit score.
- If using “Remote Signature” the documents cannot be separated Primary applicant will see co-borrowers credit score and Co-Borrower will see Primary applicants credit score.

In order to proceed with separate documents for EACH additional borrower, Designer needs to evaluate the borrower types supported by the host systems and mainly used by the FI. FI needs to decide the supported applicant types for EACH document, as each FI decides the option differently. Ex: Some FIs print RBP Notice for Guarantor while others do not.

If IMM is designing your documents then be sure to discuss your needs with your IMM designer.

10. Naming Physical Files (XFM and fillable PDF) for eSign Documents:

Enter eSign document names in the “Documents List” spreadsheet. Here are the rules for naming the physical XFM and PDF files to be used with eSign. If IMM designs/maintains the FIs eSign documents, IMM MUST always be notified by the FI if the eSign document names are changed by the FI.

Document Name (File Name) Requirements:

- The PDF file name should not contain any special characters except dashes -.
- The file name must be less than 50 characters including the extension (.pdf).
- The maximum file size when uploading documents in eSign are 2.5 MB.
- Each Imaging System may have unique requirements for file names. Consider the guidelines required by your imaging system before finalizing the document names

© 2019 IMM All rights reserved

Document Name (File Name) Requirements for TrueImage imaging system:

- File name must be less than 40 characters. Character Limit is 40.
- Dashes (-) are NOT accepted. Underscores are accepted.
- If the Credit Union is online, then Credit Union should upload the PDF into eSign and send the name of the PDF to Spectrums online representative, so that it can be added in TrueImage.

Typically, the 3rd party document vendor will name their documents with an ID number (for example, Loan Application AXX123). With each iterations of the document, the 3rd party vendor changes the document ID number (for example, Loan Application AXX123A). As a best practice, IMM recommends using generic document names without the document ID numbers (for example, Loan Application). This will simplify your document administration efforts going forward as you will only have to upload replacement documents and then you will not have to make any modifications to your document set names nor will you have to make any changes to your Imaging/ Optical/ECM (Enterprise Content Management) systems.

Here are the advantages of not using the document ID number in the file name. Note: If you decide to use the document ID number and change the file name for each iteration of the document, the following advantages become overhead.

Advantages - Document Title as the Document Name

- Document Sets will not have to be altered each time you upload a new version of the document.
- Document Mover Service (if necessary) and Imaging/Optical/ECM system will not have to alter each time you upload a new version of the document.
- Since the document name does not change, it will automatically overwrite the old version in eSign, reducing your amount of system administration.
- Since the document name does not change, criteria settings and recurring settings will be carried forward and no further administration will be required.

If you desire to be able to see the document numbers for each document within the eSign environment, we recommend that you place that document number into the “Description” field after uploading the document (Document Maintenance Screen). Remember that each time you upload documents; you want to make sure that the description field then reflects the correct document ID number that you are in fact uploading.

☐ I have entered the “Final PDF file name for eSign” in the spreadsheet which comply with my imaging system.

Preferences or Questions:

11. Field Mapping of Custom Fields Created in Your System:

The host system may allow the FI to create custom fields which are specific to that FI only. These fields are specific to your FI and are not part of the standard fields in the host system's data dictionary. If the FI has set up custom fields, provide screenshots of them in a Microsoft Word document along with the XML (where all custom fields have been completed in the host system). IMM can add the custom fields during the warranty period. There will be an extra charge** if the FI would like IMM to make custom fields outside of warranty period.

Preferences or Questions:

© 2019 IMM All rights reserved

12. Fields Color Definition and Formatting:

There can be two types of fields which may exist on eSign documents when processed within eSign 1) Host Fields which are mapped to fill-in the data from your system. The Host system fields will pre-fill the data as long as the data entry has been saved successfully within the system. 2) Generic fields are NOT available to be mapped from your system, so the data entry for these fields should be completed by member service representative (MSR) or loan officer within eSign.

IMM sets host system fields background color to green and the generic fields background color to blue. These color definitions helps eSign users during (or after) the testing phase to differentiate the fields on each document.

IMM's default Color for host fields: Green

IMM's default Color for generic fields: Blue

☐ If you prefer other colors, then enter them here:

Generic Fields:

Host Field:

☐ If you prefer no color then check this box

- Field Formatting of Generic Fields: Generic fields are formatted with templates (if applicable) to help keep the data consistent throughout the documents. For example, a date field will be set with the template MM/DD/YYYY. A phone number field will be set with template (NNN) NNN-NNNN. This allows the data to automatically format once the focus leaves the field.
- Field Formatting of Host Fields: Host fields do not need formatting because most of the data is formatted within the system.
- When setting Formatting for Dollar Amounts and Rate Fields: IMM recommends that hard coded "$" or "%" is removed and added within the field when setting the formatting. Apply the decimal places based on your FI needs. To get formatted values, the document MUST be processed (with DISPLAY) within eSign.
- Important Note: In order to avoid field shading on printed documents, print eSign documents from "Documents Submitted" screen.

Preferences or Questions:

13. Case Conversion of the Alpha-numeric fields:

Alpha-Numeric fields can be set up to convert the letter case of the data based on the FIs preferences. For example, if the FI's host system provides the data using lowercase fonts and FI prefers UPPERCASE, then IMM can set the host system fields to convert the data to UPPERCASE. This case conversion happens when the document is processed within eSign. IMM can also apply the same letter case conversion rule to your generic fields. By default the case conversion is set to "None" Check one of the following letter case conversions for all Alpha-numeric fields.

☐ UPPERCASE
☐ Lowercase
☐ Proper Case
☐ None

Preferences or Questions:

Important Note: Documents with the case conversion feature must have the Display checkbox enabled while processing documents from Document Selection screen. Case Conversion will NOT function if the user clicks the Print Preview link in eSign.

© 2019 IMM All rights reserved

14. Smart Documents:

IMM eSign is currently and natively supported by MS Internet Explorer browser. To prepare eSign for cross browser platform support, IMM is presently evaluating the challenges associated to determine what changes may be required within our solution. Considering this, IMM will be replacing the clear majority of Java Scripting and Expression Builder functionality within IMM eSign and we are strongly suggesting you change how smart documents are designed/mapped as it relates to LiquidOffice. Historically IMM supported Java Scripting to accommodate the calculations or complex needs to automatically populate document fields.

Since the major browsers outside of MS Internet Explorer do not allow for Adobe Reader Plugin as it relates to PDF Files, we are reviewing different technology options going forward. Many of these situations can be handled by using the dictionary fields in XML or by creating additional fields depending on the requirement of the document. We are asking you to please consult IMM Support BEFORE writing any additional JavaScript so as prepare for the future.

Some fields may have conditions to auto populate them based on a set of host data. We have added smart fields such as masked TIN #, masked Member # and many other smart fields that are required on some of the standard compliance documents. Majority of the fields have already been created and available in your Field Data Dictionary so download the latest dictionary from the URL provided to you. Update your document with the appropriate IMM field name.

If the required field is NOT in the dictionary, IMM can review your document and data. IMM will suggest the best option.
Contact IMM Support with the document, XML data and detailed explanation of your requirement.

- Mandatory Fields** - Mandatory fields can be added on your eSign documents so the users can complete the data before clicking “Continue” within eSign – when processing document. As the FI becomes familiar with the process of eSign documents, the FI can add mandatory fields via JSCodeGenerator.
  These fields will be set as “required fields,” which users are mandated to enter data before clicking the “Continue” button within eSign. If a field is left blank and the user clicks the “Continue” button, an alert window will appear showing the mandatory field (s) that the user needs to complete. This feature ensures that the designated mandatory field(s) will NEVER be left blank.

- Data Aware Signatures** - Data Aware Signatures are conditional signatures. The majority of the documents do not contain conditional signatures, howere there may be a few. In order for you to decide if the signature is Mandatory or Data Aware, the designer can review the language printed around the signature field. If the signature is Data Aware/Conditional, then the document requires additional JavaScript function which is billable**.

Preferences or Questions:

© 2019 IMM All rights reserved

15. Fonts

IMM uses Arial and Times New Roman as standard fonts. If the source file is designed using Times New Roman, then IMM will provide the same font. If the source document is designed with any other font, then IMM will design the document using Arial. There will be an extra charge** if the FI would like IMM to change fonts on eSign documents after IMM has finished creating documents.

Preferences or Questions:

16. Logos:

The FI should provide IMM the LATEST logo (JPG or TIF) file to be used for the eSign document. If not provided, IMM will use the logo that IMM has on file for your FI. There will be an extra charge** if the FI would like IMM to change logo on eSign documents after IMM has finished creating documents.

Preferences or Questions:

17. Duplex Printing:

IMM needs to know if the FI plans to use duplex printing for eSign documents. Duplex printing means printing on both sides of the paper. For documents with odd numbered pages, IMM will insert a blank page at the end of each document to avoid the pages from overlapping when multiple documents are printed consecutively; i.e., the second document's first page will not print on the back side of the first document's page. Blank pages which support duplex printing will include this disclaimer in the center of the page, “This page left intentionally blank.” Documents prepared by IMM are NOT set up to support duplex printing. There will be an extra charge** if the FI would like IMM to add blank pages to support duplex printing on eSign documents after IMM has finished creating documents.

Check one:

- ☐ Yes, I want duplex printing
- ☐ No, I do not want duplex printing

Note for Duplex printing: IMM's designer only adds a blank page to each applicable document accordingly. In order to print duplex, eSign user MUST select “duplex” property before clicking OK to PRINT in the PDF.

Preferences or Questions:

18. Removing Duplicate Pages:

Some source files may contain duplicate pages. For example, a three page document which contains identical pages EXCEPT its footer: page 1 - “Financial Institution Copy,” page 2 - “Borrower Copy,” and page 3 - “Filing Copy.” IMM recommends removing all duplicate pages if the pages are identical EXCEPT its footer. IMM removes the footer on page 1 and deletes pages 2 and 3. eSign enables the user to print numerous copies of each document; therefore, it is unnecessary to design duplicate pages. All eSign documents are electronically archived and stored in a FI's imaging/optical/ECM (enterprise content management) system to be opened on demand. There will be an extra charge** if the FI would like IMM to prepare duplicate pages on eSign documents.

Check one:

- ☐ Yes, remove duplicate page (Recommended)
- ☐ No, do not remove any duplicate pages

Preferences or Questions:

© 2019 IMM All rights reserved

19. PDF417 Barcode:

eSign only supports PDF417 Barcodes. The barcode represents the eSign index fields' data in a barcode format. The barcode can be placed on documents that are mailed out to obtain signatures. Once the signed document is received back in-house, then it can be scanned and is ready to be saved into your imaging system. Confirm that the scanner supports PDF417 barcode. There will be an extra charge** to place the PDF417 Barcode field on eSign documents. Review the four options below and select the one that best fits your business needs.

1. ☐ "On Demand Barcode Coversheet" for each eSign dictionary type**
   This is a separate eSign document which contains the index fields and the barcode. This document should be designed to be used for each dictionary type in eSign. The coversheet can be modified to meet your expectations. The advantage of using the coversheet is that it is demand based (in case you want to image any non-eSign document). FI can use the "On Demand Barcode Coversheet" when FI wants to mail a set of documents to get a wet (pen to paper) signature. When the FI receives the signed documents along with the "On Demand Barcode Coversheet" then a back office user can scan the barcode following all signed documents to index and save to the imaging system. Its convenient and can be launched on demand. IMM recommends this option.
2. ☐ *Barcode Coversheet*
   This coversheet is provided with eSign which appends to each and every document set archived. The only modifications we can make to this coversheet would be the logo and title of this coversheet. If the coversheet is misplaced, then the only way to regenerate it is by re-processing the document set.
   Important Note: FI must choose one of the following archive options in eSign-Settings, to archive this barcode coversheet:
   ☐ Archive Document Sets only
   ☐ Archive Both Individual and Document Sets only
3. ☐ *One barcode per each eSign document***
   IMM can place a barcode on top of each document's first page depending on the space permitted. If the first page does not have enough space, then the barcode will be placed on top or bottom of the second page. With this option, there is no chance of losing the coversheet. Choose one of the following. FI may not need barcode on all documents, so enter "One barcode per each document" in "Documents List" for those specific documents respectively. IMM only recommend this option for those specific documents that have to be mailed out to get signatures.
   ☐ All Documents
   ☐ See "Documents List" for "One barcode per each document"
4. ☐ *Barcode on each page of eSign document***
   Every page will get a barcode depending on the space permitted. If FI selects this option, then the page # will be automatically added as an index field to your archived PDF. A barcode on each page of eSign document is helpful if in case the coversheet OR the page containing the barcode gets lost. FI may not need a barcode on all documents, so enter "One barcode per each page" in "Documents List" for those specific documents respectively. IMM only recommends this option for specific documents that have to be mailed out to get signatures.
   ☐ All Documents
   ☐ See "Documents List" for "One barcode for each page"
   ☐ No Barcode or None

Preferences or Questions:

© 2019 IMM All rights reserved

20. Electronic Documents Warranty Period:

During the warranty period of electronic documents, an IMM designer can take care of any fields' mapping corrections/modifications. The warranty period on electronic documents expires 45 days from the date of delivery. Any design or mapping corrections/ modifications required beyond the 45 day period are billable. Prior to going live with eSign, your documents which are created by IMM have a warranty period of 90 days from eSign live date. Any ongoing electronic documents order with IMM after the live date will follow the normal warranty period of 45 days from the date of delivery.

** Billed to you upon completion of the job at the current AM or Non-AM rate per hour depending on the status of the document.

FI Name:	
User Name:	
Telephone:	
E-Mail:	
Preferences or Questions:	

The undersigned financial institution employee is authorized to place an order for any billable work explained above and acknowledges an invoice will follow:

© 2019 IMM All rights reserved