eDelivery (Click To Agree) Enrollment Job Aide

The electronic delivery (eDelivery) service enables account holders the option to receive a next-day e-mail notification that eligible documents can be sent via email for viewing instead of receiving the document through U.S. mail. To do this, the client will need to "Agree" to the changes before they will be updated on the account.

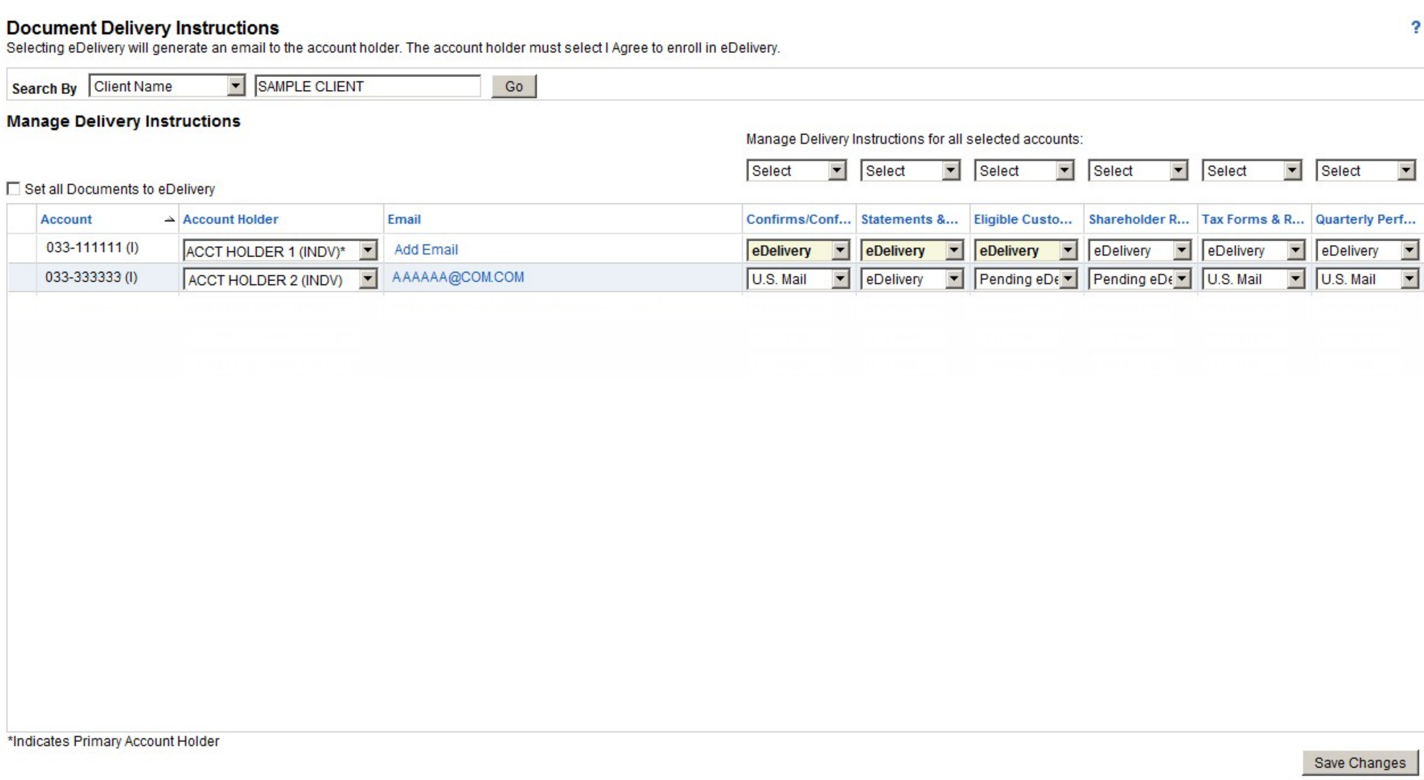
eDelivery Enrollment Process

1. Rep or MMLIS initiates eDelivery for an account in Wealthscape
2. The account holder receives an email
3. The account holder clicks "I Agree" in the email. The system immediately acknowledges that the change to eDelivery for the listed accounts is successful. If not successful, the account holder is informed of the reason.
4. If successful, the delivery instructions for the selected accounts and document types change to eDelivery.

Enrollment Process (Existing Accounts)

NOTE: When a restricted account is blocked for eDelivery, the account row on the window will be grayed out. In addition, if an account is not enabled for certain document types, those document types are grayed out for that account.

From the Wealthscape Home Page, Select Service/Document Delivery Instructions.



1. **Search By**: Select either Account # or Client Name and enter a complete or partial account number or client name. Enter the information in the next field. Click “Go”.
    a. If you enter the complete account number or unique client name, the account or client accounts display.
    b. If you enter a partial account number or client name, the Account or Client Lookup window opens. On the window you can select multiple accounts to update.

2. **Set All Document to eDelivery**: Select set all eligible documents for eDelivery

3. **Account Holder**: Select the Account Holder to receive the “Click To Agree” email and the notification emails.

4. **Email**: Click **Add Email** to enter the email address for the account holder. If an email displays, click the linked email to change the email address or the account holder to receive the email.

5. **Delivery Instructions (all accounts)**: Select “eDelivery” to change delivery instructions for a document for all eligible accounts.

6. **Delivery Instructions (one account)**: Select “eDelivery” to change delivery instructions for one account.

7. **Save Changes**: Click to generate the “Click To Agree” email to the email address of record.

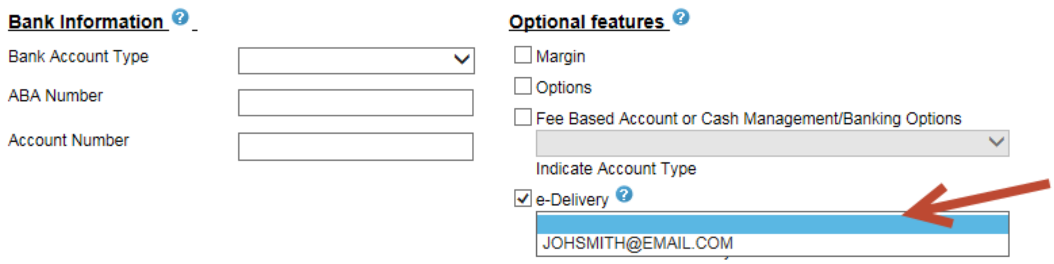
NOTE: After changes are SAVED, delivery instructions display “Pending eDelivery” and the “Click To Agree” email is generated. After the account holder clicks “I Agree” on the email, delivery instructions change to “eDelivery”.

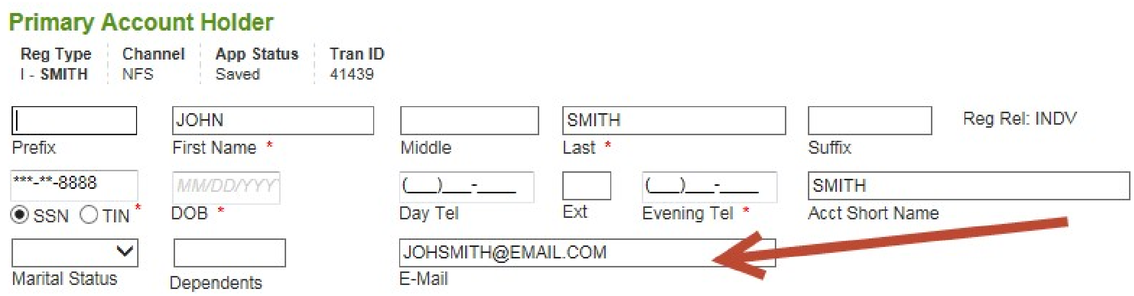
Enrollment Process (New Clients Entered on UAO in Wealthscape)

1. When entering an account in UAO, on the Characteristics page under Optional Features, there will be an option for “e-Delivery”.

2. Check the e-Delivery box under the drop down menu. Select the email address for the client that was entered on the Primary Holder page. If this section is blank, on the Primary Holder page, enter the email address for the client in the “E-Mail field”. Go back to the Characteristics page, and the email address will then be available under the e-Delivery drop down.

3. Once the account has been submitted and an account number created, the client will receive the “Click To Agree” email the next business day. Once they select “I Agree”, they will be signed up for e-delivery for all eligible documents under that account.





Changing Email Address and eDelivery Instructions:

You may modify email addresses, change the eDelivery email address of record, and, if requested by the account holder, remove the account from eDelivery (change the setting to “US Mail”).

When any of these changes are made, a letter is sent through the U.S. mail to each account holder notifying them of the changes.