

DocuSign Quick Start Guide and FAQ

About this Document

The purpose of this document is to provide Santander customers with frequently asked question when using DocuSign to sign a Santander Document.

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Quick Guide to using DocuSign

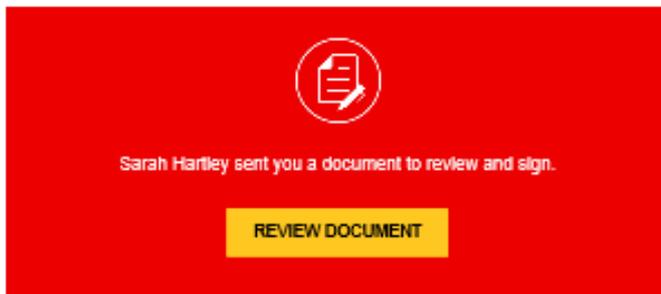
1. Customer Signing Steps

Signing a document with DocuSign is simple and intuitive. There is no cost to you as a signer nor do you need to register as a user to sign a Santander document.

As a Santander Customer, once you have received the email from DocuSign follow these easy steps to complete the signing process:

Step 1: Open the Document for review

- a. In the email click on the button that says **“REVIEW DOCUMENT”**.

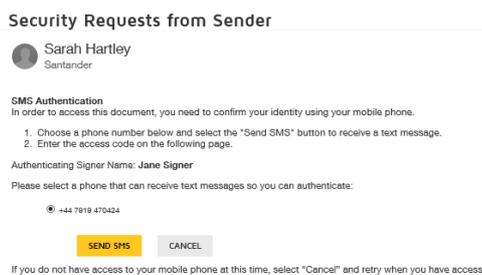


- b. This will transfer you into the secure DocuSign portal which will give you secure access to your agreement.

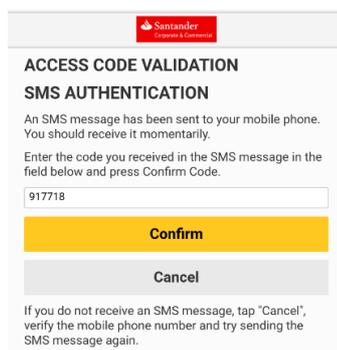
Step 2: Authentication

Once you have clicked **“View Documents”** an SMS authentication process is launched, which will send an SMS with a one-time Passcode to the signer.

- a. Ensure that the mobile number is correct and then click **“SEND SMS”**.



- b. A text message will be sent to your mobile phone with a one-time 6-digit Passcode.
- c. Enter this code and click **“Confirm”**.



Step 3: Agree to Sign Electronically

- a. To confirm that you are happy to do business electronically with Santander, read the Electronic Signature Disclosure Statement and then tick the check box to agree.
- b. Click **"CONTINUE"** to begin the signing process.

Step 4: Review and Sign

- a. Check that your document reflects the application that we have agreed and complete any required information.
- b. If you are not a DocuSign account holder you will be asked to create or "adopt" your electronic signature.
- c. You may be asked to upload a Specimen Signature. [See below for process.](#)
- d. Once you have completed all required fields and signatures, click **"Finish"** to complete the signing process.

Note: You will receive a follow up email confirming that the process has been completed.

2. Providing a specimen signature (If Required)

You may need to provide a specimen signature for account operation purposes, we will need to collect a specimen signature from you for future verification.

We collect this by uploading a specimen of your signature to a DocuSign document. To upload your signature:

1. Take a photo or scan of your hand drawn signature (specimen signature).
2. Click on the paperclip button in the document you are signing.



3. Select the image or file containing your specimen signature to upload.



4. Click **"DONE"**.

3. Additional Signing Information

- For detailed steps on "how to sign", click [here](#).

FAQs about the signing process

1. Nothing happens when I click on “Review Documents”?

1. Check your internet connection.
2. If you are, then confirm how you are trying to access it. The minimum system and browser Requirements:

System Requirements	Most modern computers will work just fine with DocuSign however the below minimum system requirements needed to enjoy the DocuSign experience.
Browsers:	DocuSign supports the latest stable release (except where noted) of the following browsers: <ul style="list-style-type: none">• Chrome• Firefox• Safari• Internet Explorer 10+• Windows Edge
Screen Resolution:	1024 x 768 minimum (for desktops and laptops)
Security	<ul style="list-style-type: none">• Allow per session cookies• Users accessing the Internet behind a Proxy Server must enable HTTP 1.1 settings via proxy connection• Firewall settings must allow access to the following server: https://docucdn-a.akamaihd.net. DocuSign leverages Akamai as a content delivery service to enhance our application's performance.
Platforms:	Compatible with desktops, laptops, mobiles and tablets

2. I did not receive an email to sign documents from Santander. What should I do?

Check your spam/junk folder for the email. If it is not in your spam/junk folder, contact the servicing team on 0800 028 8258 who will resend your document.

3. The mobile number for SMS authentication is not correct. What should I do?

Contact servicing team on 0800 028 8258 who will send a corrected version of the documents with the correct mobile number for SMS authentication.

4. My authentication failed. What should I do?

You have a maximum of three attempts at authentication. If you are unsuccessful at authenticating, you will need to contact the servicing team on 0800 028 8258 will resend a new authentication code.

5. How do I apply an e-signature?

As part of the signing process you will be prompted to select a signature style the first time you sign a document. You can use one of the following methods:

- **Choose** - select any of the preformatted e-Signature styles,
- **Draw** - create a freehand drawing of your signature and initials, or
- **Upload** - upload an image of your signature and initials.

Note: Applying your e-signature is different to the [providing a specimen signature collection process](#) which may mean that we need a sample of your wet ink signature.

6. When I click “Finish,” I am unable to complete the signing. Why is this?

It’s likely that an action is still required somewhere in the document, or that a required field is not yet complete.

Hint:

- **Mandatory** fields are outlined red.
- **Optional** fields are outlined orange.
- Use the **Next Button** to move between mandatory fields.

7. I’ve clicked “Finish”, however I did not receive a follow up email. What should I do?

You will not receive an email with your documents until all signers have completed the signing process.

If you believe the application has been completed by all signers, please contact the servicing team on 0800 028 8258 to check the status of the application. If the application has been completed, we will forward you a copy of the application to you.

8. How do I get a permanent copy of my completed document? Do I need to print anything?

As part of our digital strategy, we are going paperless and providing your agreement to you in an auditable electronic format. There are a couple of options for keeping a permanent copy:

- **From the portal:** When you click “**REVIEW DOCUMENT**” and are transferred to the DocuSign portal, you will see two icons at the top of the screen allowing you to print and/or download a copy.



- **As an attachment:** Once you have clicked “Finish” you will receive an automated email telling you the process has ‘Completed’, with a copy of your contract attached to the email. From here you can print or download a copy.

9. What do I do if I have completed signing a document and then realise information needs to be changed?

Once you have completed the signing process it is not possible to make any changes or edits. You will need to contact the servicing team on 0800 028 8258 to complete a new document.

10. I would prefer to review and sign my document(s) in paper form. Is this possible?

As part of our digital journey to provide a more automated and sustainable way of working, we encourage you to experience the paperless way of signing documents. Please watch the video available that demonstrates how simple and easy this is.

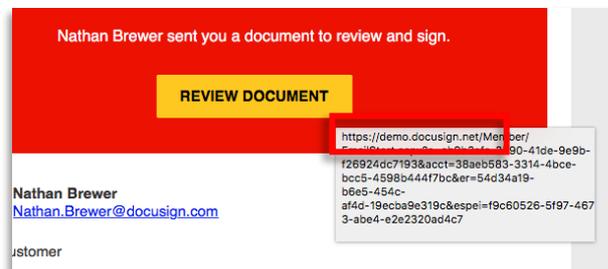
11. How can I be sure that the request for signature is a legitimate request and how can I be certain about security?

While DocuSign and Santander have adopted the highest security measures possible, please ensure you adhere to the following additional precautions:

1. If you were not expecting an email from us, please contact your named organisation contact to ensure this is intended for you.
2. How do I know if the email is genuine?
 - a. The email will always be sent from “Santander via DocuSign”
 - b. The email address will end with “@docusign.net”:



- c. All URLs to view or sign DocuSign documents start with “https” and contain “docusign.net/”. To check this, hover your mouse over the “REVIEW DOCUMENT” button:



- d. There will be a valid site certificate associated to the DocuSign domain. To check this, once you have clicked on “REVIEW DOCUMENT” ensure there is a padlock symbol to the left of the web address in your browser window, i.e.



- e. Before you can commence signing your document, you will need to verify your identity via SMS authentication.
3. What do I do if I believe the email is not genuine?
 - a. Do not open the document if you believe the email is not genuine.
 - b. Contact the servicing team on 0800 028 8258 who will advise next steps.
 4. Having confirmed the email is legitimate, how do I ensure only I can Execute the actions assigned to me?
 - a. Never forward an email from DocuSign to another person or email address otherwise the recipient can sign in your name.
 - b. Never share your SMS authentication code with anyone.

FAQs about DocuSign and e-Signature

1. Why have I received an email from Santander via DocuSign?

As part of our digital strategy, we are on a journey to provide a great customer experience by operating in a more sophisticated, automated and sustainable way. We have partnered with DocuSign – a leader in digital transaction management (DTM) services – to deliver agreements to our customers via a secure and simple to use electronic process.

2. What is DocuSign?

DocuSign enables people around the world to electronically review and sign documents on any device in any time zone in hours rather than days. Since starting out in 2003, DocuSign remains the world's leading e-signature provider.

Today, more than 300,000 organisations worldwide trust DocuSign to support valid electronic records and legally binding electronic signatures, with around 1 million documents being digitally signed every day.

3. Why DocuSign?

At Santander we put customers first. Signing transactions electronically means that there is no need for the traditional, error-prone, paper-trail process which uses up time and paper. By signing with DocuSign we can be more efficient together whilst also being sustainable global citizens.

4. What is an electronic signature?

An electronic signature (or E-Signature) is an electronic means of signing a document.

5. Is DocuSign legal and legally binding?

- DocuSign e-Signatures are legally binding for nearly every business or personal transaction in almost every country in the world.
- When combined with an audit trail, tamper-sealing, strong authentication and bank grade security, a DocuSign Signature is arguably more enforceable than a wet-ink signature because of the court admissible evidence it contains.
- DocuSign eSignatures comply with UK law, the European Union Regulation No 910/2014 on electronic identification and trust services ([eIDAS Regulation](#)), as well as international laws and statutes.
- To learn more about current eSignature laws, visit the DocuSign [eSignature Legality Guide](#).

6. Is my personal information secure when I sign a Santander document using DocuSign?

- Your personal information is entirely secure. DocuSign meets or exceeds national and international security standards, including strict security policies and practices that set the standard for world-class information security.
- Read more about [DocuSign's approach to Security and Privacy](#) in [DocuSign's Trust Centre](#).

7. How do I contact Santander if I have any questions about signing a document with DocuSign?

Please contact the servicing team on 0800 028 8258

