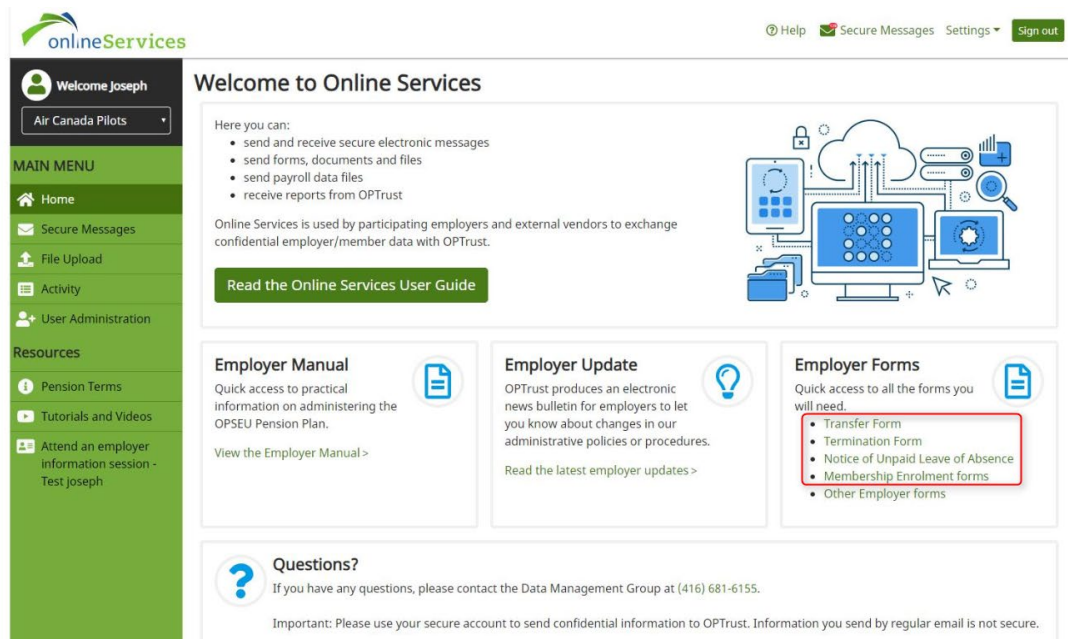


HOW TO ELECTRONICALLY SIGN FORMS USING DOCUSIGN THROUGH ONLINE SERVICES

You can electronically sign and submit the following forms using DocuSign through *Online Services*:

- Transfer Form
- Termination Form
- Notice of Unpaid Leave of Absence
- Membership Enrolment forms

From the *Online Services* employer home page:



2. A new window opens: **PowerForm Signer Information.**

If you selected **Transfer Form**, **Termination Form** or **Notice of Unpaid Leave of Absence**:

- Fill in **Your Name** and **Your Email** as the **Employer**.
- Click on **Begin Signing**.

If you selected **Membership Enrolment forms**:

- Fill in **Your Name** and **Your Email** as the **Employer** and the **Name** and **Email** for the **Employee**.
- Click on **Begin Signing**.
- The Employee will be automatically notified via email to complete their section on the form (see Step 11 to see how the Employee completes the form).

3. The first time you attempt to access a form online, you will be prompted to read the **Electronic Record and Signature Disclosure** and you must click on **the box** indicating **I agree to use electronic records and signatures** prior to gaining access to the electronic form.

4. Click on **Continue**.

5. Form is now accessible and fillable.

If you selected **Transfer Form** or **Termination Form**:

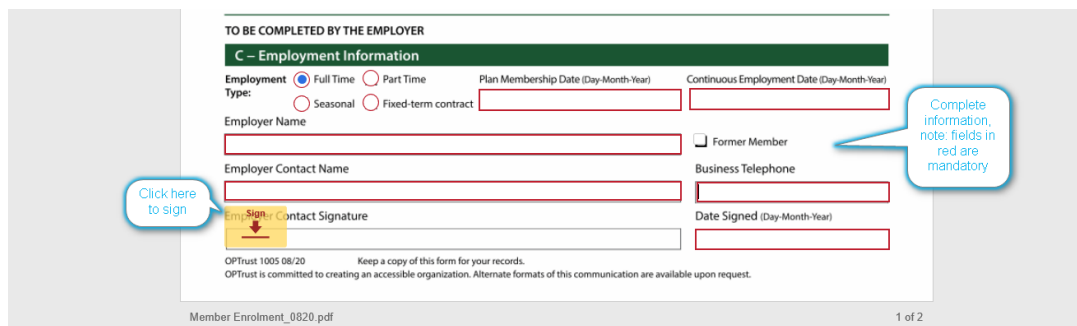
- Fill in the **mandatory form fields highlighted with a red border** and any optional fields.
- When you are ready to sign, click on **Sign**.

If you selected **Notice of Unpaid Leave of Absence**:

- Fill in the **mandatory form fields highlighted with a red border** and any optional fields.
- If **pregnancy/parental** leave, you must fill in **sub-allowance section**.
 - If **Yes** is elected for sub-allowance, you must enter in **dates**.
- If other **ESA-type** leave, you must select from the **drop-down list**.
- If **illness or WSIB** leave, the end date is not required, if unknown.
- When you are ready to sign, click on **Sign**.

If you selected **Membership Enrolment form**:

- Fill in the **mandatory form fields highlighted with a red border** and any optional fields under the **Employer Section** (towards the bottom of the first page).
- When you are ready to sign, click on **Sign**.



6. Select Your Signature

- **Full Name** (Mandatory) – Type in your name to be used for your signature.
- **Initials** (Mandatory) – Type in your initials to be used when initials are required.
- **Select Style** (Optional)
 - **Draw** – Allows you to manually write your signature.
 - **Upload** – Allows you to upload a pre-existing signature.
 - **Change Style** – Allows you to select a different font for your Full Name and Initials.

When you've completed filling in the mandatory fields and any optional fields, click on **Select and Sign**.

Select Your Signature

Confirm your name, initials and signature.

* Required

Full Name* Initial Used for initials

SELECT STYLE

Preview: DocuSigned by:

By selecting Select and Sign, I agree that the signature and initials will be the electronic representation of my signature and initials for all purposes when I (or my agent) use them on documents, including legally binding contracts - just the same as a pen-and-paper signature or initial.

Step 7: Choose Signature and click on Select and Sign.

7. You will be brought back to the form.

Review the form to ensure everything has been filled out correctly. If you click Complete without review and there are mistakes on the form, you will need to create a new form and begin the electronic signing process from the start (Step 1).

Once the form is electronically signed, click on **Complete**.

Review and sign document(s)... x

File Edit View Favorites Tools Help

Please review and complete the documents below

COMPLETE OTHER ACTIONS

START

I consent:

a. to receive communications from OPT Trust electronically and understand that I will not be provided with paper copies unless I specifically request them. I understand that OPT Trust will deliver personal information using secure messaging or regular mail if secure messaging is not available. I may instruct OPT Trust at anytime that I would prefer to receive communications in paper form; and

b. to the collection and use by OPT Trust of all the information on this form and all attachments and information that OPT Trust may request from me or my employer, or that I may provide to OPT Trust, in conjunction with my participation in the OPSEU Pension Plan. I also consent to OPT Trust sharing my personal information with my employer(s) or others for plan administration purposes.

Signature: Date (Day-Month-Year)

TO BE COMPLETED BY THE EMPLOYER

C - Employment Information

Employment Full Time Part Time Plan Membership Date (Day-Month-Year) Continuous Employment Date (Day-Month-Year)

Type: Seasonal Fixed-term contract

Employer Name Former Member

Employer Contact Name Business Telephone

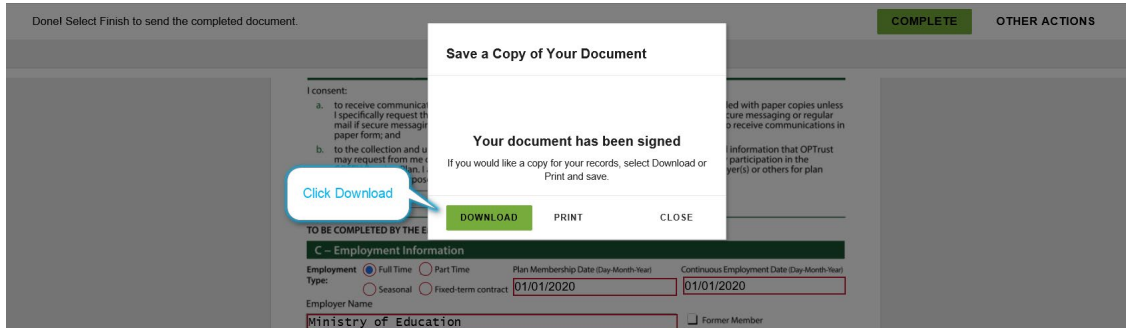
Employer Contact Signature Date Signed (Day-Month-Year)

OPT Trust 1005 08/20 Keep a copy of this form for your records.
OPT Trust is committed to creating an accessible organization. Alternate formats of this communication are available upon request.

Member Enrollment_0820.pdf 1 of 2

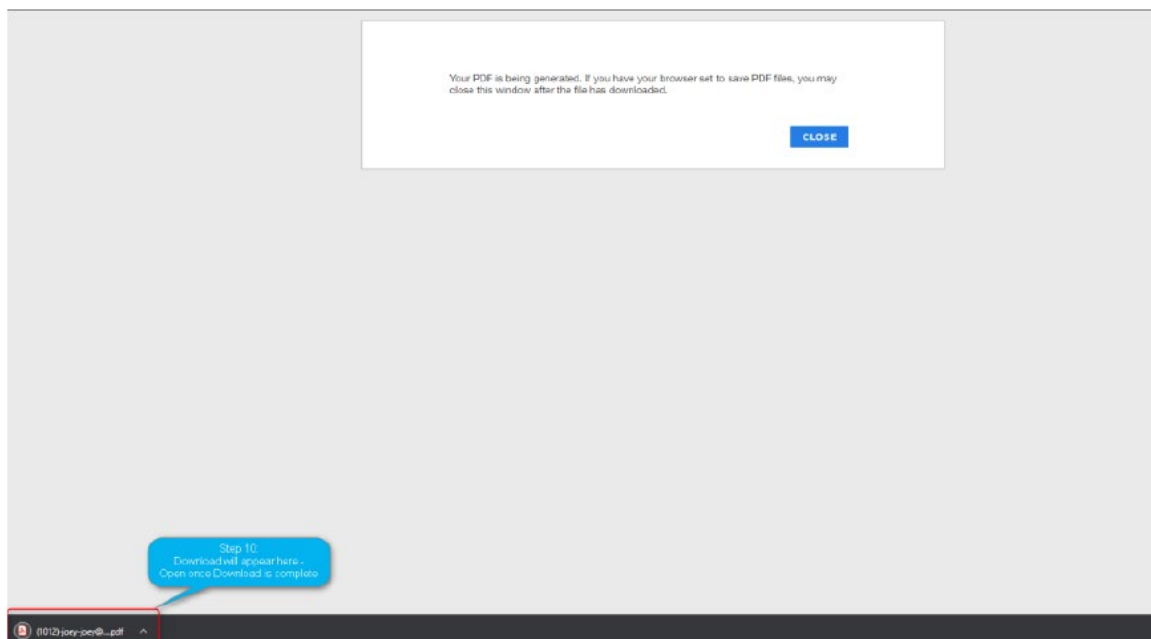
Once signed click "Complete"

8. A pop-up window opens: **Save a Copy of Your Document**. Click on **Download** and open the downloaded form.

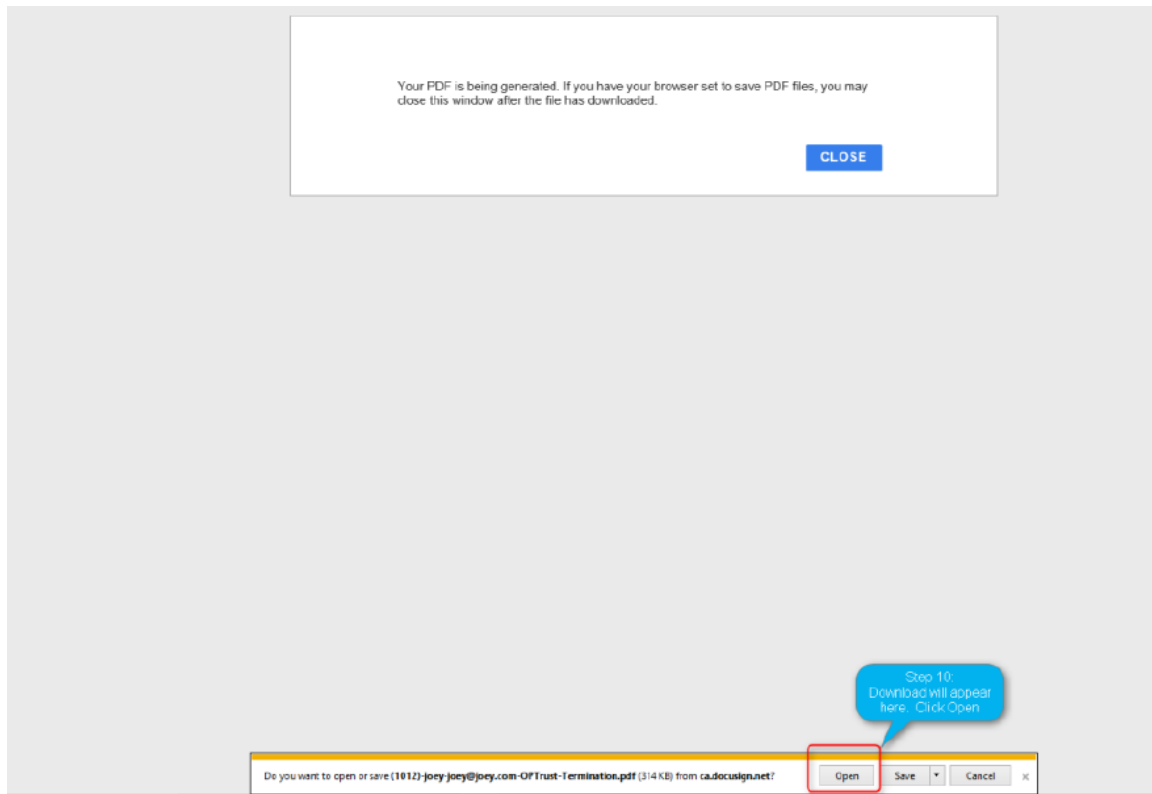


The screenshot shows a web form titled "Don't Select Finish to send the completed document." with a "COMPLETE" button and "OTHER ACTIONS" link. A pop-up window titled "Save a Copy of Your Document" is centered on the screen. The pop-up contains the text "Your document has been signed" and "If you would like a copy for your records, select Download or Print and save." Below this text are three buttons: "DOWNLOAD", "PRINT", and "CLOSE". A blue callout bubble points to the "DOWNLOAD" button with the text "Click Download". The background form is partially visible, showing a consent section and a "C - Employment Information" section with fields for "Employment Type" (Full Time, Part Time, Seasonal, Fixed-term contract), "Plan Membership Date (Day-Month-Year)", "Continuous Employment Date (Day-Month-Year)", and "Employer Name" (Ministry of Education).

For Chrome users:



For Internet Explorer and Edge Users:



For FireFox users:

Your PDF is being generated. If you have your browser set to save PDF files, you may close this window after the file has downloaded.

[CLOSE](#)

Opening (1012)-joey-joe@joey.com-OPTrust-Termination.pdf

You have chosen to open:

(1012)-joey-joe@joey.com-OPTrust-Termination.pdf
 which is: Adobe Acrobat Document (315 KB)
 from: https://ca.docuSign.net

What should Firefox do with this file?

Open with: Adobe Acrobat Reader DC (default) ▾

Save File

Do this automatically for files like this from now on.

Settings can be changed using the Applications tab in Firefox's Options.

OK
Cancel

Step 10:
Click OK to Open Document

9. **Save** the form locally.

Review and sign document(s)...

- File
- Edit
- View
- Favorites
- Tools
- Help
- New tab
- Duplicate tab
- New window
- New session
- Open with Microsoft Edge
- Open...
- Edit
- Save
- Save as...**
- Close tab
- Page setup...
- Print...
- Print preview...
- Send
- Import and export...
- Properties
- Exit

[CLOSE](#)
OTHER ACTIONS

MEMBER ENROLMENT

Telephone: 416-461-6100 Toll-Free: 1-800-457-0024
 Email: enrol@opstrust.com Website: opstrust.com

First Name

Male* Female* * This information is required for actuarial valuation purposes.

Employer Name Date of Birth (Day Month Year)

Social Insurance Number Employee/WRN Number

Primary Email Address Work Telephone Number

Alternate Email Address Personal Telephone Number

Mailing Address Suite City/Town Province Postal Code

Save locally

10. If you selected **Transfer Form, Termination Form** or **Notice of Unpaid Leave of Absence**, compose a new **secure message** through *Online Services*.

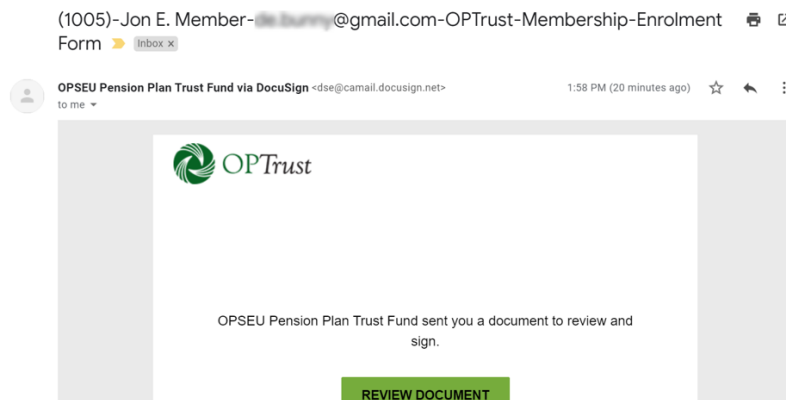
- **Reference #** (Mandatory) – This is automatically populated.
- **Mailbox** (Mandatory) – This is automatically selected.
- **Topic** (Mandatory) – Select the appropriate topic based on the form you are submitting from the drop-down menu.
- **Employee ID** (Optional) – Add the member’s employee number.
- **Content** (Mandatory) – Input any information to be included with the electronic form submission.
- **Drag and Drop or Choose File** (Mandatory) – Attach the completed and signed form.

When you’ve completed the above for the new secure message, click on **Send Message**.



11. If you selected **Membership Enrolment forms**, you need to wait for the Employee to fill in their section of the form before being able to submit it (see Step 2) and you will be automatically notified via email when the Employee has completed their section:

- Employee clicks on **Review Document** from their email to open the form.

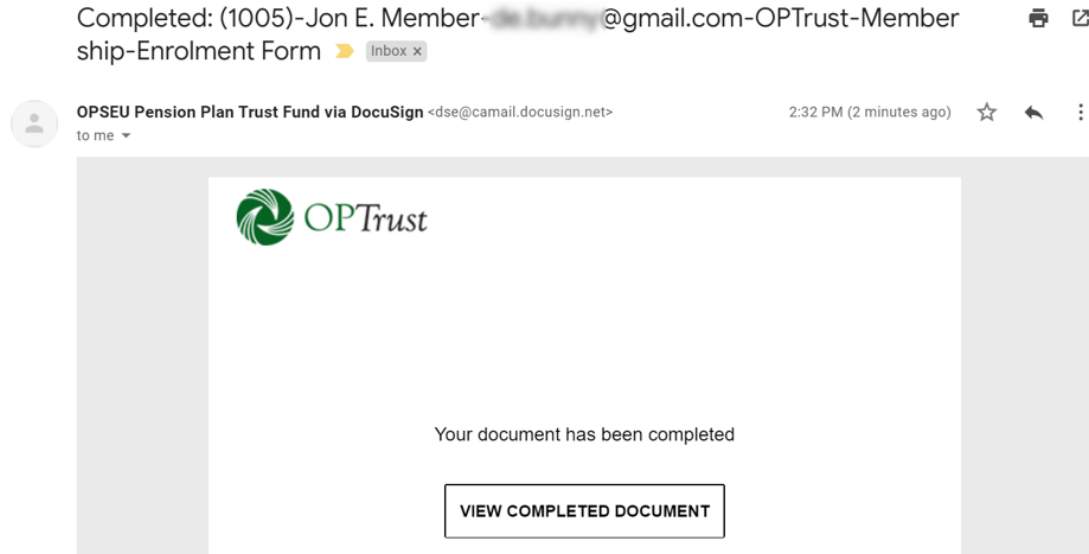


- Employee is prompted to read the **Electronic Record and Signature Disclosure** and they must click on **the box** indicating **I agree to use electronic records and signatures** prior to gaining access to the electronic form.
- Employee clicks on **Continue**.

- Form is now accessible to the Employee and fillable.
- Employee fills in the **mandatory form fields highlighted with a red border** and any optional fields under the **Employee Section**.
- When the Employee is ready to sign, they click on **Sign**.
- Employee will select their signature (see Step 6).
- Employee will be brought back to the form. Once the form is electronically signed, they click on **Complete**.

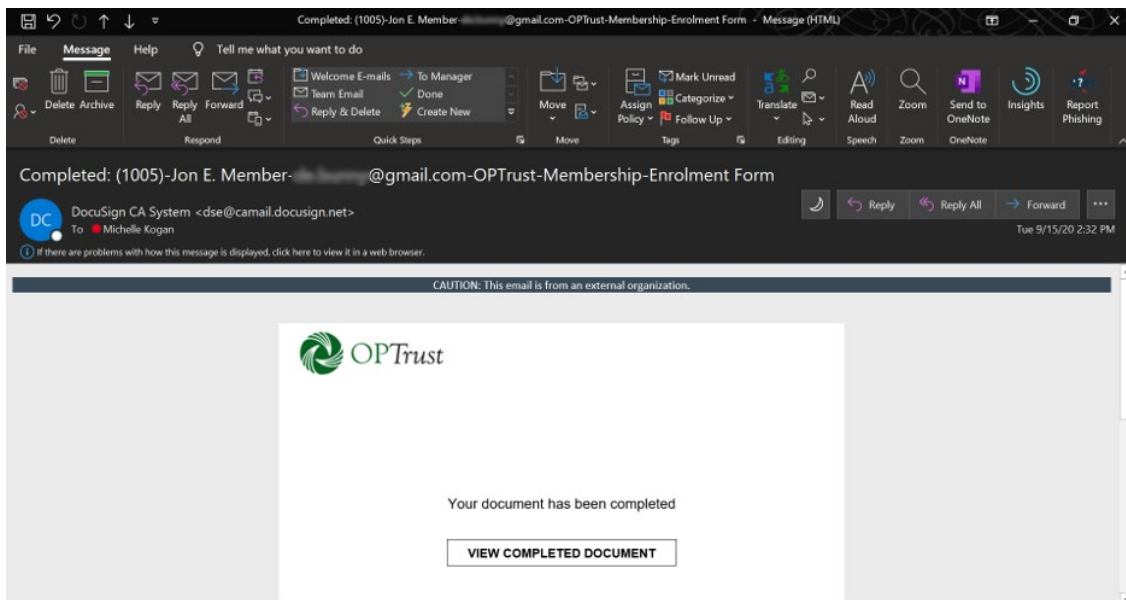
- Employee has the option to download a copy of the form (see Steps 8 and 9) or if they do not want to download a copy of the form, they just click on **Complete**.

- Once the Employee downloads/completes the form, they will automatically receive an email with a copy of the form: **View Completed Document**.

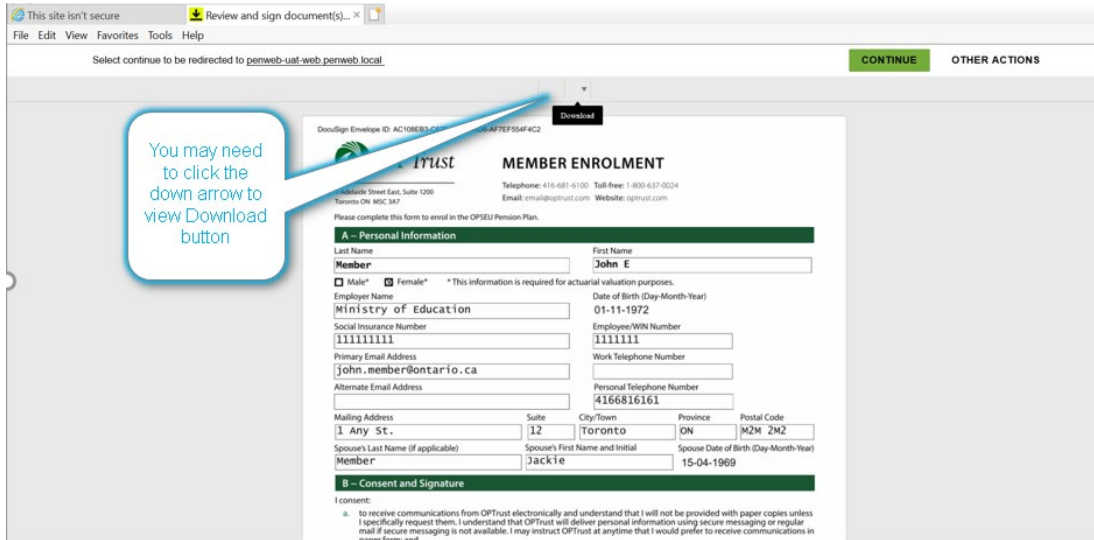


- Once the Employee has completed their portion of the form, the Employer will automatically be notified via email:

- Click on **View Completed Document** to open the form.



- Download the form and compose a new **secure message** through *Online Services* (see Step 10: Transfer Form, Termination Form or Notice of Unpaid Leave of Absence).



This site isn't secure | Review and sign document(s)... x

Select continue to be redirected to penweb-uat-web.penweb.local

CONTINUE OTHER ACTIONS

DocuSign Envelope ID: AC106E51-0000-4000-9000-00007E7554F4C2

MEMBER ENROLMENT

Telephone: 416-681-6100 Toll-free: 1-800-637-0024
Email: email@optrust.com Website: optrust.com

Please complete this form to enrol in the OPSEU Pension Plan.

A – Personal Information

Last Name: Member First Name: John E

Male* Female* * This information is required for actuarial valuation purposes.

Employer Name: Ministry of Education Date of Birth (Day-Month-Year): 01-11-1972

Social Insurance Number: 111111111 Employee/WIN Number: 11111111

Primary Email Address: john.member@ontario.ca Work Telephone Number:

Alternate Email Address: Personal Telephone Number: 4166816161

Mailing Address: Suite: 12 City/Town: Toronto Province: ON Postal Code: M2M 2H2

Spouse's Last Name (if applicable): Member Spouse's First Name and Initial: Jackie Spouse Date of Birth (Day-Month-Year): 15-04-1969

B – Consent and Signature

I consent:

a. to receive communications from OPTrust electronically and understand that I will not be provided with paper copies unless I specifically request them; I understand that OPTrust will deliver personal information using secure messaging or regular mail if secure messaging is not available. I may instruct OPTrust at any time that I would prefer to receive communications in paper form; and

If you have any questions or need assistance, please reach out to us at (416) 681-6100 or toll free at 1-800-637-0024. You can also send us an email to employerservice@optrust.com.