

## Obtaining Signature(s) Online in Lieu of Face-to Face Funeral Arrangements

During the COVID-19 State of Emergency, you may be unable to meet with next of kin face-to-face to obtain necessary signatures for funeral arrangements. The NJSFDA recognizes this challenge and has reviewed possible options to obtain needed signatures on your funeral home documents electronically (also known as E-signatures).

Our recommendation is to use a web-based product called DocuSign during this crisis. DocuSign provides full security of your documents throughout the signature process. And best of all, you can continue to use the fillable PDFs, provided by us, that many members already use. **Please see page 2 for helpful illustrations in utilizing your forms, according to your classification (NJSFDA Member, Thanexus, Inc. Shareholder or Funeral Matters subscriber).**

While this work around has not been officially recognized by a regulatory board or state official as of publication, we highly recommend that members consider utilizing this temporary procedure as a means for documenting interaction with the individual(s) with right to control and complying with the applicable laws and regulations concerning signatures.

Funeral homes should communicate directly with individual cemeteries and crematories to confirm their individual temporary process for securing authorization signatures on their paperwork when in-person meetings with the appropriate next-of-kin cannot be held.

When the individual(s) with right-to-control have email access but not the ability to print or scan paperwork that requires their signature in order for funeral homes to proceed with arrangements, this document outlines a temporary and recommended process in an attempt to satisfy the signature requirements established in **N.J.S.A. 45:7-95**, **N.J.S.A. 45:7-85**, and **N.J.A.C. 13:36-1.9** as follows:

**This document and electronic process is only to be utilized during the restrictions currently instituted by the State of New Jersey during the COVID-19 pandemic.**

**FIRST** – Sign up for a DocuSign\* account. This is done one time and once done, you are ready to use this product for your document signing needs. This will be your most time-consuming exercise (purchasing a subscription and preparing your specific funeral home documents as templates).



<https://www.docusign.com>

**SECOND** – Secure required signatures from the individual(s) with right to control using DocuSign for each arrangement.

*\*This is a service that is suggested by the New Jersey State Funeral Directors Association, Inc. during the 2020 COVID-19 pandemic. We do not receive any compensation or payments for endorsing this product.*

## NJSFDA Membership:

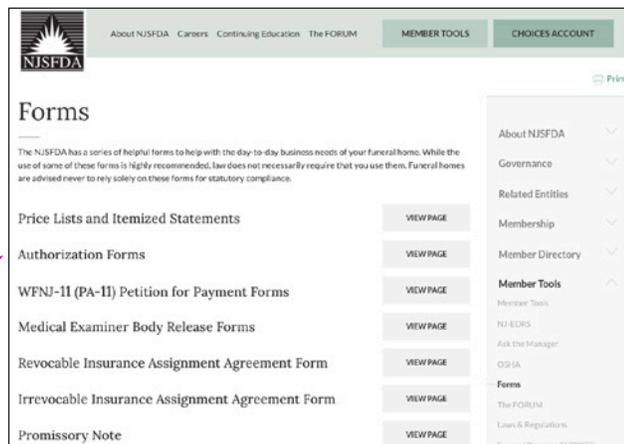
If you are not already using our pdfs with fillable form fields you can retrieve them here (See Page 3 for more details):

### Price Lists and Itemized Statements:

"Click" View Page Button

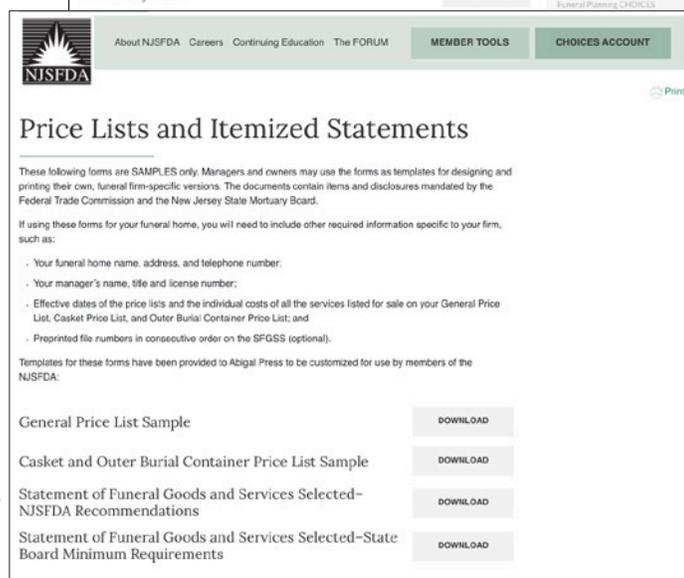
### Other Authorizations Forms:

NJSFDA Recommendations



### Form Field Statement of Funeral Goods and Services Selected:

NJSFDA Recommendations



## Thanexus, Inc.:

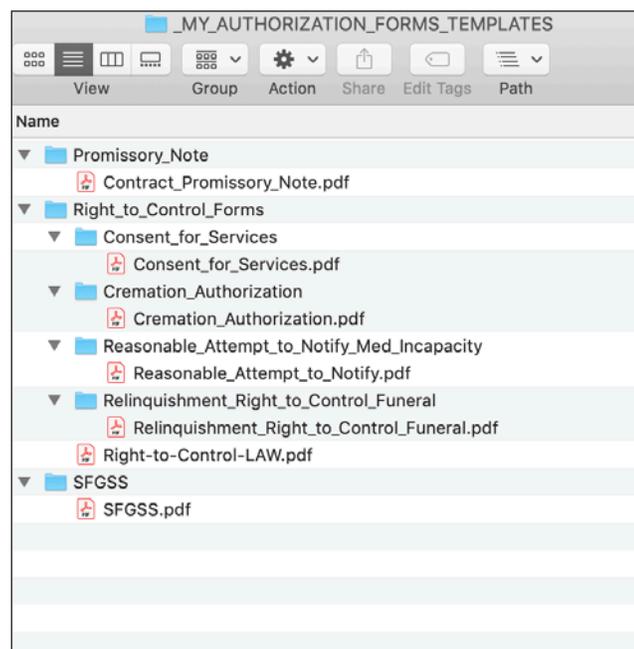
Shareholders have **ALL** their current authorization forms in their possession to date. If you are in need of retrieving them again please contact the Thanexus Marketing.

Jill Materia [jmateria@njsfda.org](mailto:jmateria@njsfda.org)

## Funeral Matters:

Subscribers can continue to use the Funeral Matters "tool" to create their Statement of Funeral Goods and Services Selected, saving it as a pdf. The other authorization forms that you may need should be in your possession to date. If you are in need of retrieving them again please contact:

Jill Materia [jmateria@njsfda.org](mailto:jmateria@njsfda.org)



Please read this helpful document before you begin.

## IMPORTANT:

- You will need Adobe Acrobat Reader at the minimum to utilize your forms, **DO NOT USE YOUR BROWSER**. If you are creating your pdf through a browser, all functions will not operate correctly, like your calculations and saving your entries.
- Sign up for a DocuSign account.
- Managers-of-the-Day can continue to assist you with regulatory questions/inquiries, **BUT** not your individual device (computer, tablet, etc.) problems.

Before you begin the DocuSign process you should prepare templates and organized folders for your arrangements.

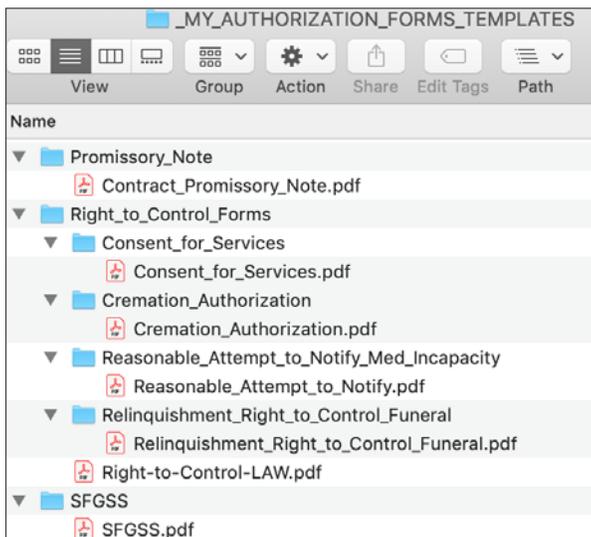
It is a good idea to make sure you have all your Authorization Forms in one place. You can locate these forms by “clicking” the **Forms button** on our home page or directly via [www.njsfda.org/forms](http://www.njsfda.org/forms). Log-in to the website is necessary to access all forms.

Make a folder on your desktop with all your templates: **\_MY\_AUTHORIZATION\_FORMS\_TEMPLATES** (See illustration below).

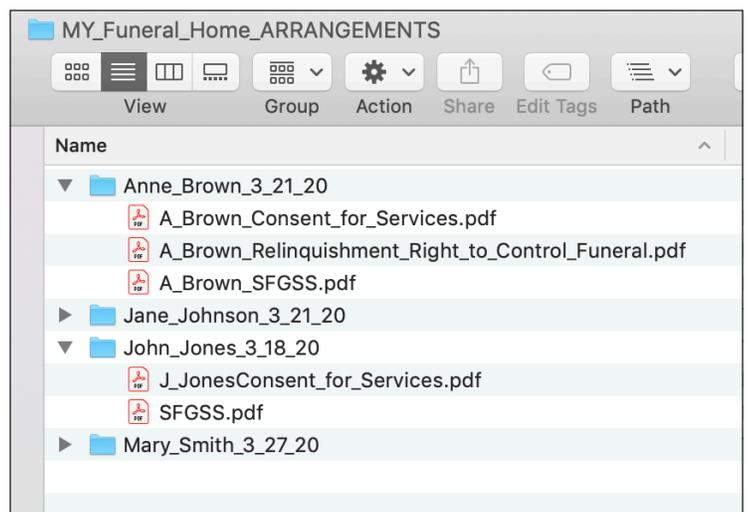
You can prepare all of your necessary information in these pdf(s) that you encounter every time and save in **\_MY\_FUNERAL\_HOME\_ARRANGEMENTS**. See illustration below.

It is best to be organized now before you proceed. See illustrations below for organizational suggestions. Then when you begin making arrangements you can save your documents in a similar way. Now you will be prepared for the process.

### Funeral Home Authorization Form Templates (on your desktop/hard drive)



### Funeral Home Authorization Forms for Arrangements You Have Completed (on your desktop/hard drive)



## Step 1: DocuSign Account Creation

- Go to <https://www.docusign.com/> to create an account.
- Click the **“Login”** link at the top right corner of the page.
- Create an account with the **“No account? Sign up for free”** as illustrated.

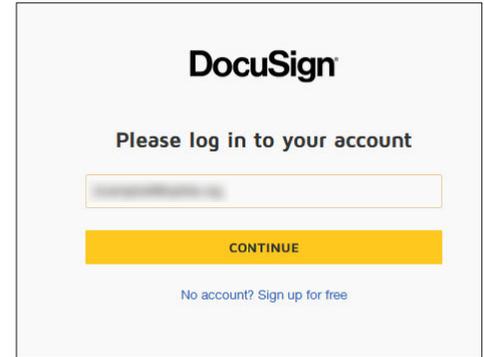
**IMPORTANT:** You can try DocuSign for **free for 30 days** with a **limit of five (5) envelopes\***.

**After 30 days you must upgrade to a paid version** (See illustration of pricing options on Page 13).

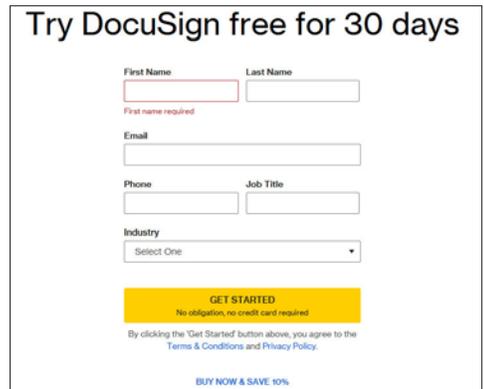
You will need to make this determination for your individual business needs.

**\*Envelope**=One (1) complete set of documents, needed for one (1) arrangement, emailed to all the necessary individuals.

- You will now be asked to fill out a brief form, with the information as illustrated.

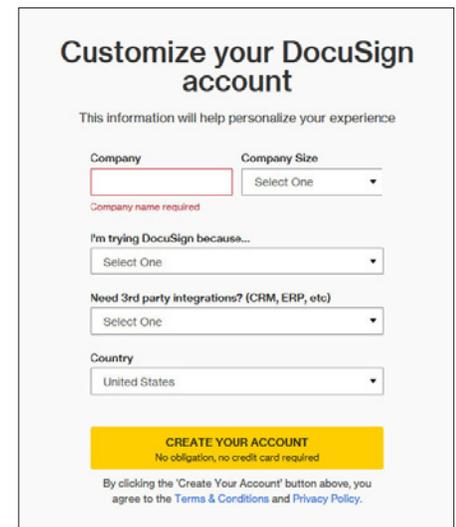


The screenshot shows the DocuSign login interface. At the top, the DocuSign logo is displayed. Below it, the text reads "Please log in to your account". There is a text input field for the email address, which is currently empty. Below the input field is a prominent yellow button labeled "CONTINUE". At the bottom of the page, there is a link that says "No account? Sign up for free".



The screenshot shows a registration form titled "Try DocuSign free for 30 days". The form includes several input fields: "First Name" and "Last Name" (with a red border around the First Name field and a red error message "First name required" below it), "Email", "Phone", and "Job Title". There is also an "Industry" dropdown menu with "Select One" as the current selection. At the bottom, there is a yellow button labeled "GET STARTED" with the subtext "No obligation, no credit card required". Below the button, there is a small disclaimer: "By clicking the 'Get Started' button above, you agree to the Terms & Conditions and Privacy Policy." At the very bottom, there is a link that says "BUY NOW & SAVE 10%".

- You will also be asked to provide your Funeral Home information.
- Once you've created an account, you will receive an **account activation email**. Click **“Activate”** and you will be able to access your DocuSign account.



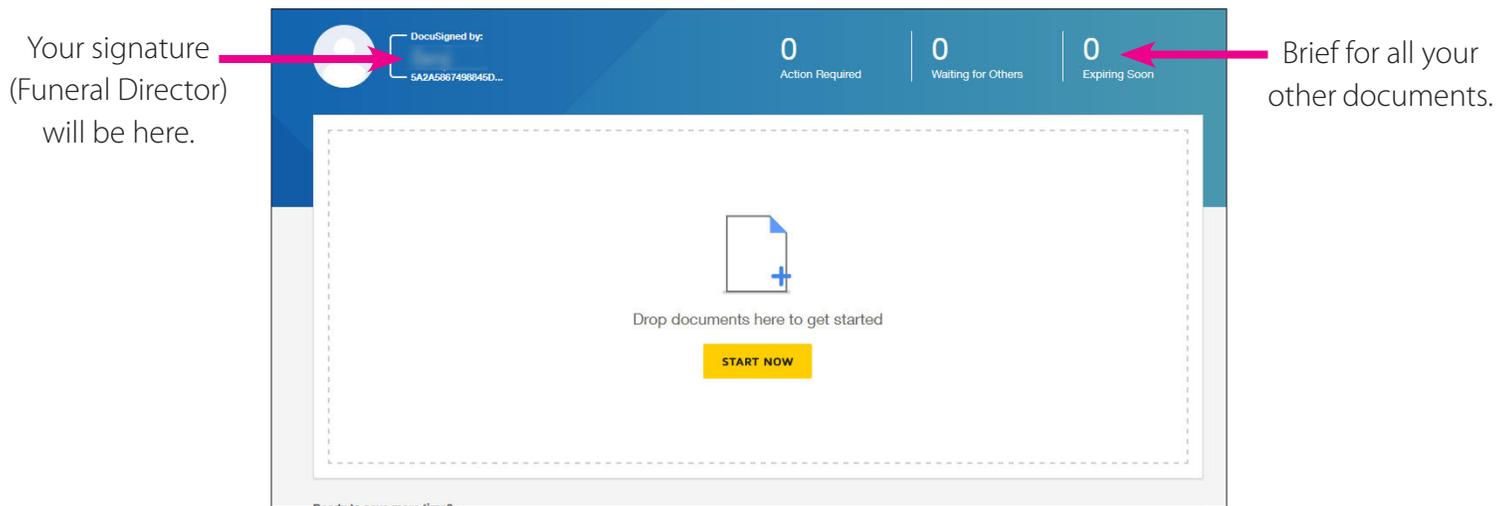
The screenshot shows a form titled "Customize your DocuSign account". The text above the form reads "This information will help personalize your experience". The form includes several input fields: "Company" (with a red border around the field and a red error message "Company name required" below it), "Company Size" (a dropdown menu with "Select One" as the current selection), "I'm trying DocuSign because..." (a dropdown menu with "Select One" as the current selection), "Need 3rd party integrations? (CRM, ERP, etc)" (a dropdown menu with "Select One" as the current selection), and "Country" (a dropdown menu with "United States" as the current selection). At the bottom, there is a yellow button labeled "CREATE YOUR ACCOUNT" with the subtext "No obligation, no credit card required". Below the button, there is a small disclaimer: "By clicking the 'Create Your Account' button above, you agree to the Terms & Conditions and Privacy Policy."

## Step 2: Using DocuSign

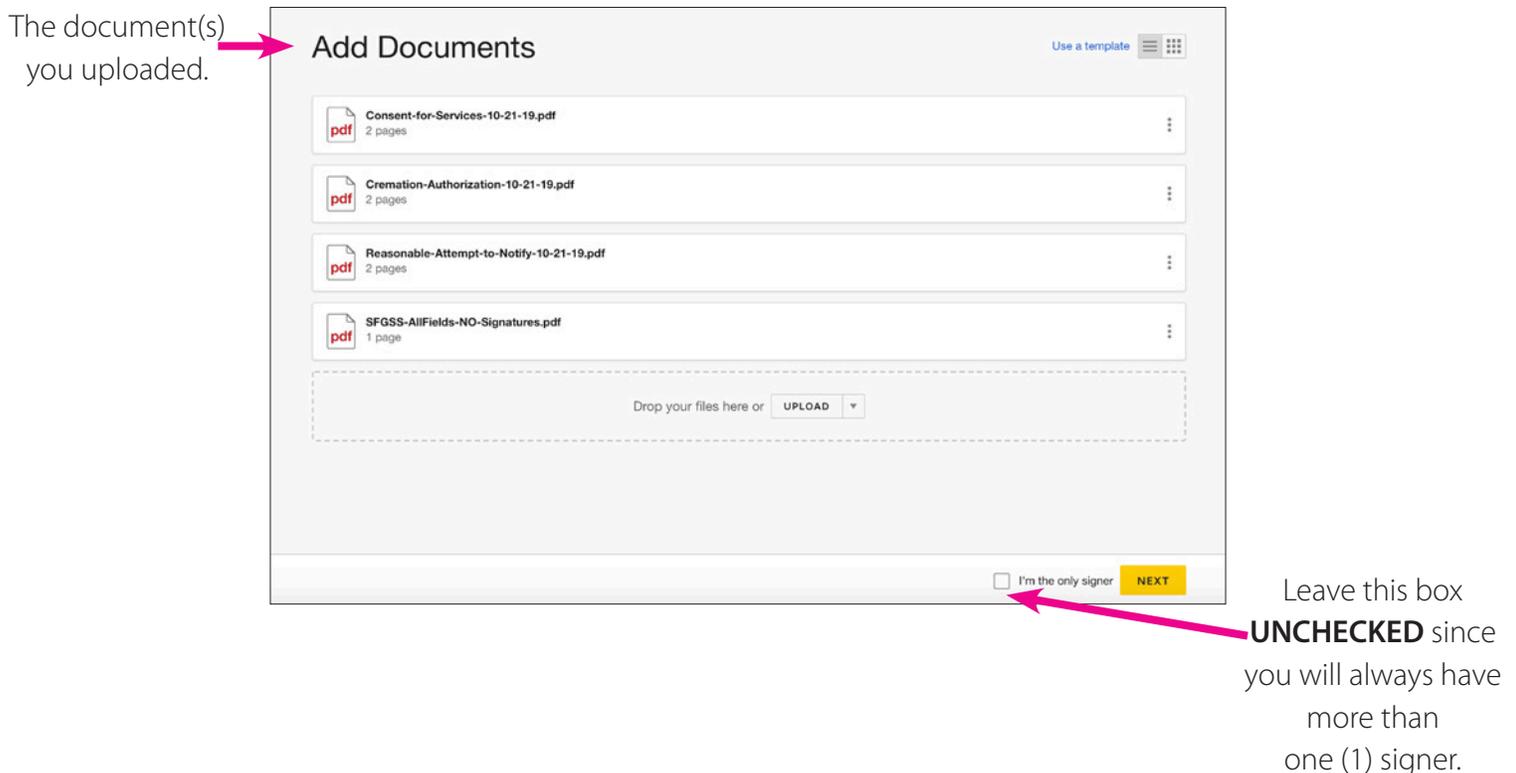
- Before uploading, first complete all your form field PDFs, making sure that you fill in everything that is required since there will be no changes after each set of arrangement documents are uploaded to DocuSign and are signed. Save your PDFs for your recordkeeping. You **DO NOT** have to enter the **date**, since DocuSign will automatically place it in the date field.

**If you need help on how and where to find and download the forms and also how to organize them please refer to pages 2-3 of this document**

- When you log in to DocuSign, you have the option of dragging and dropping one (1) or more files (e.g.; pdf, doc, etc. versions of your SFGSS, Consent for Services, Authorization for Cremation (where applicable), Contract/Promissory Note, work copy of the EDRS draft death certificate, and any ancillary documents including cemetery/crematory and funeral home specific paperwork) into DocuSign, to upload them, *as illustrated below*:



- Once your documents are uploaded, click the **"NEXT"** button to proceed.



- Next you will be able to add recipients to your document. These are the individuals who will be **required to sign** the document. You may add additional recipients by clicking the **“Add Recipients”** button.

Your name as a Funeral Director will be here, but you should **add yourself** to the recipients as well since so you can sign the document.

- It’s important to create the **“order of receipt”**. Doing this will prevent the signature process from advancing until it’s been signed by **EACH** person in the sequence you want.
- To do so, check the box **“Set signing order”**. Then place a number to the right of each recipient, denoting the order of receipt and signing:

You as the Funeral Director will be one of the recipients to sign the document, it’s your choice to be the first or last signer.

**We recommend that you be the first signer.**

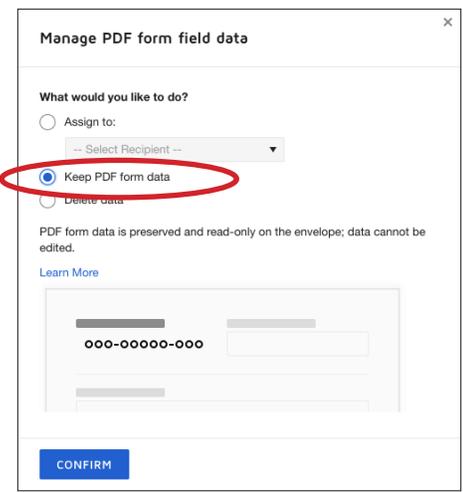
If you are the last signer you will **not get any notifications UNTIL** the signer before you has completed their turn.

If you have an administrative employee who needs a copy of this you can change the **“Needs to Sign”** to **“Receives a Copy”**.

**REMINDER:** The number of signers can’t be more than the number of signers needed on the form(s) you’re uploading (example: the SFGSS has only two (2) signers, one of them is you. Some necessary forms may have two (2) signers while others may have multiple signers).

- Once you’ve added your recipients, you are now ready to proceed. Click **“NEXT”**:

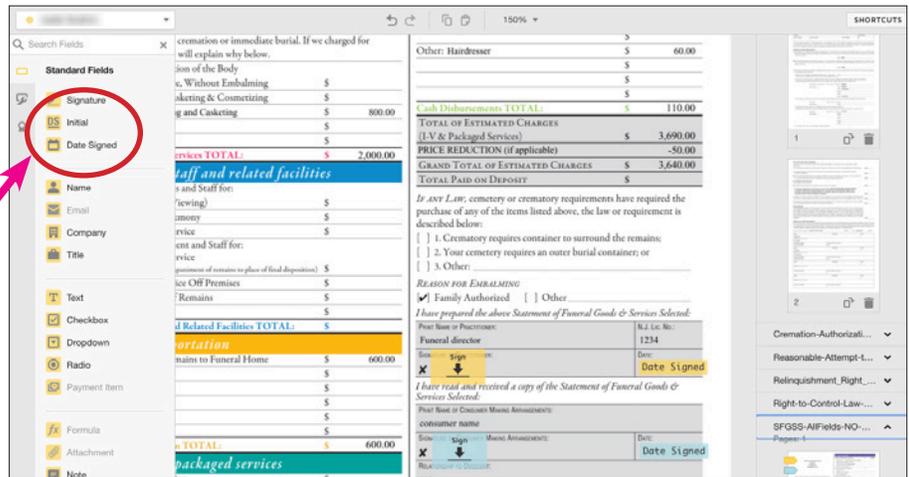
- This will activate the **“Manage PDF form field data”** confirmation dialogue box. Select the **“Keep PDF form data”**; this will place the document in a “flattened state” and preserve the data (calculations, drop down selections, etc.) you have entered. The data will now **not be accessible to revise/edit by anyone**.



- Click **“CONFIRM”**, here you will see your document and standard fields that you can use in the signing, initialing, etc. of your document.

**Name of person signing.**

If more than one Funeral Director, there will be a drop down menu. Choose (one) 1 at a time.

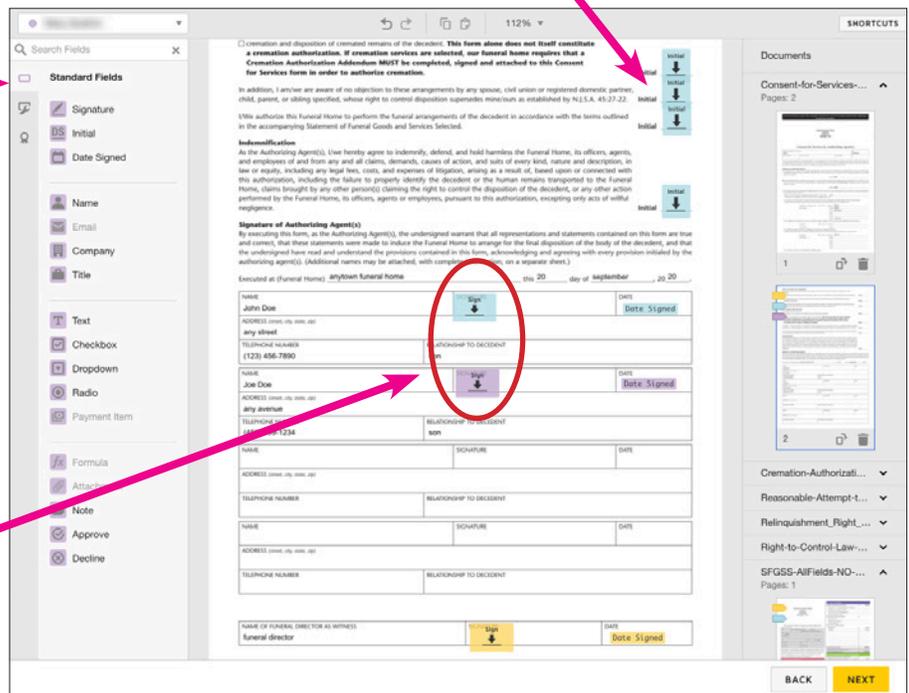


Drag and drop the **Signature** or **Initials** where you need to sign, and where you’ll need the consumer to sign.

**IMPORTANT:** Only first next-of-kin needs to initial if there is more than one (1) next-of-kin.

With the **“Standard Fields”** section to the left of the screen, you can simply drag and drop from here onto your document.

Here are two examples of this (the yellow, blue and purple fields represent different individuals who will sign and/or initial these forms).



**TIP:** When dragging the small tags for signature and/or initials, align the small line of the tag with the line on the form.

- Once you are done adding all the necessary Signatures and/or Initials on all of your PDFs, click **“Next”**. You’ll be prompted with **“Review and Send”**. This is where you can enter an **email message** to the recipient(s) of your document. We would recommend at minimum, **“Important Documents from XYZ Funeral Home.”**

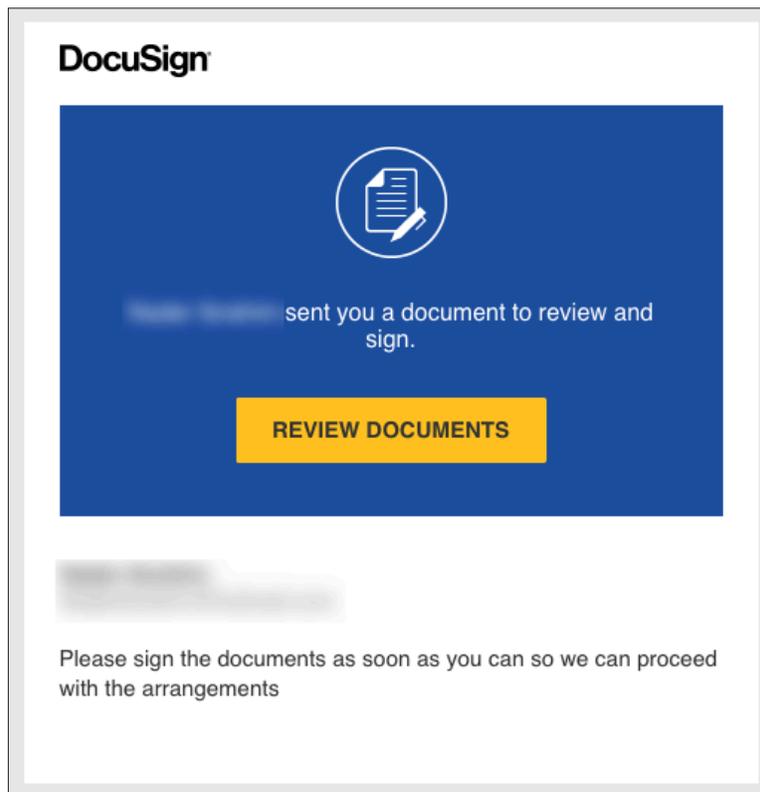
Also, you will have the **option of sending automatic reminders** (in case recipients have not completed their part in the process).

**TIP:** Insert an obvious email subject since this will be the **name of the envelope**, it will be easier to manage later.

You can set the auto reminders. It will only send a reminder to those who **HAVE NOT** signed.

### Step 3: Recipients Signature

- Your recipients will receive an email with a link to the document they will be signing. *Illustrated below:*



- The first step in the signature process is agreeing to the **“Electronic Record and Signature Disclosure”**. After checking the agreement box, the recipient will be able to continue.

Please agree to use electronic records and signatures and **CONTINUE**.

- Now your recipients can sign and/or initial. After they've clicked **finish the process**, it is now complete. An email will be sent to you the initiator and the recipients of the document.

You, and your consumers, have two (2) options to sign, either by scrolling down until you find the **Sign** or **Initial tags**, or by clicking **“START”** or **“NEXT”** and DocuSign will bring you exactly to where the signatures are to be signed.

Sample signed by the **First** recipient and then being sent to the **Second** recipient.

- When the first signer clicks the **"FINISH"** button, an email goes to the next signer and then the next, until all the signers finish. Then an email will be sent to all the participants with the final document(s) attached.

Funeral Ceremony	\$	
Memorial Service	\$	
Use of Equipment and Staff for: Graveside Service (Including accompaniment of remains to place of final disposition)	\$	
Funeral Service Off Premises	\$	
Sheltering of Remains	\$	
Other:	\$	
<b>Other Staff and Related Facilities TOTAL:</b>	<b>\$</b>	
<b>iii. transportation</b>		
Transfer of Remains to Funeral Home	\$	600.00
Hearse	\$	
Limousine(s)	\$	
Other:	\$	
	\$	
	\$	
<b>Transportation TOTAL:</b>	<b>\$</b>	<b>600.00</b>
<b>optional packaged services</b>		
Direct Cremation	\$	
Immediate Burial	\$	
Forwarding Remains	\$	
Receiving Remains	\$	
<small>(If you select an optional package, see General Price List for a list of included services.)</small>		
<b>Optional Packaged Services TOTAL:</b>	<b>\$</b>	

described below:  
 1. Crematory requires container to surround the remains;  
 2. Your cemetery requires an outer burial container; or  
 3. Other: \_\_\_\_\_

REASON FOR EMBALMING  
 Family Authorized     Other \_\_\_\_\_

I have prepared the above Statement of Funeral Goods & Services Selected:

PRINT NAME OF PRACTITIONER: Funeral director    N.J. Lic. No.: 1234  
 SIGNATURE OF PRACTITIONER:    DATE: 3/26/2020

I have read and received a copy of the Statement of Funeral Goods & Services Selected:

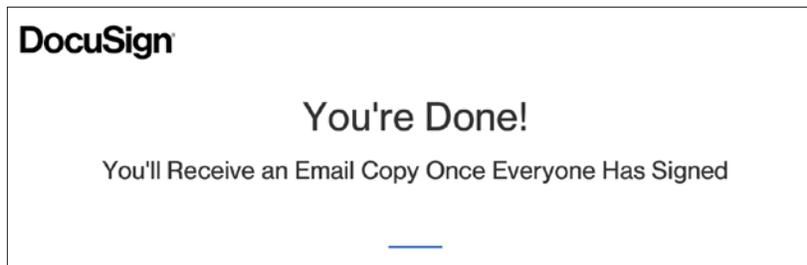
PRINT NAME OF CONSUMER MAKING ARRANGEMENTS: \_\_\_\_\_  
 CONSUMER NAME: \_\_\_\_\_  
 SIGNATURE OF CONSUMER MAKING ARRANGEMENTS: \_\_\_\_\_    DATE: \_\_\_\_\_

RELATIONSHIP TO DECEDENT: son  
 STREET ADDRESS: 123 any street  
 CITY: anytown    STATE: NJ    ZIP: 12345

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SFGSS-AllFields-NO-Signatures.pdf 1 of 1

Before you click **FINISH** review your document(s) that all is correct.



**Save a Copy of Your Document**

Sign up for a FREE DocuSign account today and sign all your documents electronically.

Email: mlouca11@hotmail.com

Password:

Confirm Password:

Country: -- select --

By clicking the 'SUBMIT' button, you agree to the [Terms & Conditions](#) and [Privacy Policy](#).

**Electronically sign any document.**

**Get signatures from others.**

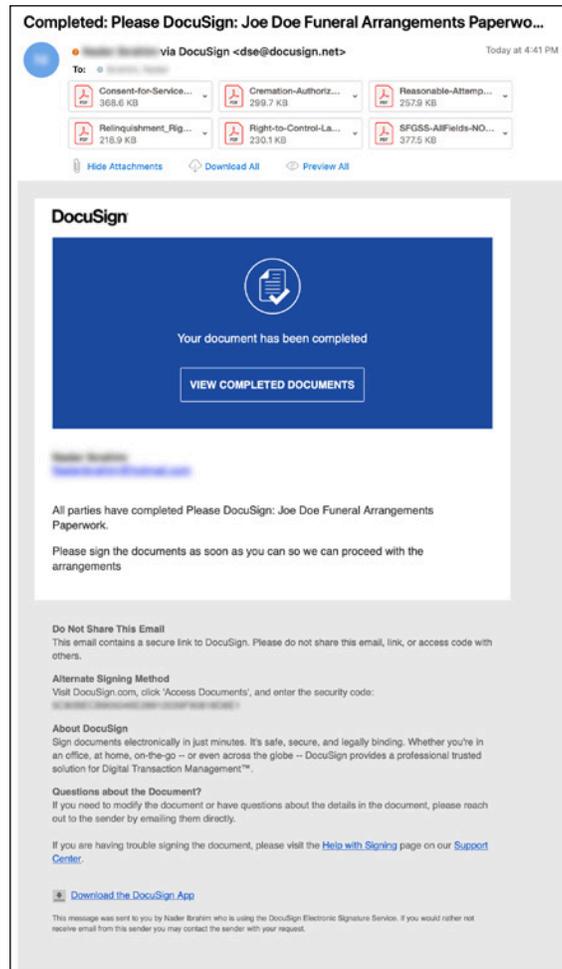
**Sign on the go with DocuSign Mobile!**

**SUBMIT**    NO THANKS

**TIP:** For consumers, no need to create an account since they will receive an email with all the documents once signed by everyone.



Once all individuals are done signing the documents, each of them will get this email with all the documents attached.

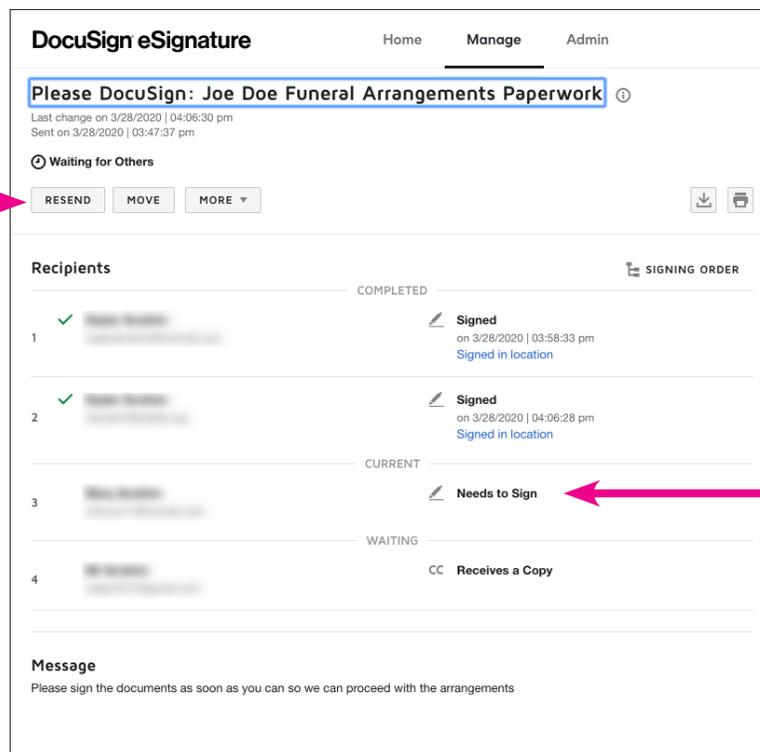


• The Sender (Funeral Director) will get the same email, and can also manage all the files from the **“Manage”** tab in DocuSign. *Illustrated on the next page:*

# Managing the Process



Frequently check your **“Manage tab”** to see the progress of your document signing.



**TIP:** If one of your recipients did not get their email, check if it's their turn, if not the individual before them will have to sign first. You can re-send from your manage tab.

Only the individual who has not signed will receive this re-send.

The message will go only to the next person in the sequence that **HAS NOT** signed.

When or if you need to upgrade to the paid version of DocuSign, monthly and annual pricing options are available. **(The free 30 days trial is limited to 5 envelopes.)**

**Annual option** - fee shown is per month and 12 months will be charged in advance.

DocuSign | Welcome, Nader | Not Nader? Log out

### Upgrade Your Plan

ANNUAL MONTHLY

Personal	REALTORS <sup>®</sup>	Standard	Business Pro
\$ 10 per month	\$ 20 per user, per month	\$ 25 per user, per month	\$ 40 per month
<a href="#">BUY NOW</a>	<a href="#">BUY NOW</a>	<a href="#">BUY NOW</a>	<a href="#">BUY NOW</a>
Single user only	Buy up to 3 users online. For more than 3 users, call us at 1-877-720-2040.	Buy up to 3 users online. For more than 3 users, call us at 1-877-720-2040.	Buy up to 3 users online. For more than 3 users, call us at 1-877-720-2040.
5 document sends a month	Send documents for signature	Send documents for signature	Send documents for signature
Basic fields	Basic fields	Basic fields	Basic fields
Mobile app	Mobile app	Mobile app	Mobile app
Integrate with Dropbox, Google Drive & More	Integrates with zipForm <sup>®</sup> Plus <sup>1</sup> , Dropbox, Google Drive & More	Integrates with Dropbox, Google Drive & More	Integrates with Dropbox, Google Drive & More
	Comments	Comments	Comments
	Reminders & notifications	Reminders & notifications	Reminders & notifications
	REALTORS <sup>®</sup> Branding	Personalized branding	Personalized branding
	Strikethrough		Collect Payments
			Advanced fields
			Signer attachments
			Bulk Send

NJSFDA recommends purchasing the **STANDARD** plan.

**Monthly option** - paid in advance, one month at a time.

DocuSign | Welcome, Nader | Not Nader? Log out

### Upgrade Your Plan

ANNUAL MONTHLY

Personal	REALTORS <sup>®</sup>	Standard	Business Pro
\$ 15 per month	\$ 35 per user, per month	\$ 40 per user, per month	\$ 60 per user, per month
<a href="#">BUY NOW</a>	<a href="#">BUY NOW</a>	<a href="#">BUY NOW</a>	<a href="#">BUY NOW</a>
Single user only	Buy up to 3 users online. For more than 3 users, call us at 1-877-720-2040.	Buy up to 3 users online. For more than 3 users, call us at 1-877-720-2040.	Buy up to 3 users online. For more than 3 users, call us at 1-877-720-2040.
5 document sends a month	Send documents for signature	Send documents for signature	Send documents for signature
Basic fields	Basic fields	Basic fields	Basic fields
Mobile app	Mobile app	Mobile app	Mobile app
Integrate with Dropbox, Google Drive & More	Integrates with zipForm <sup>®</sup> Plus <sup>1</sup> , Dropbox, Google Drive & More	Integrates with Dropbox, Google Drive & More	Integrates with Dropbox, Google Drive & More
	Comments	Comments	Comments
	Reminders & notifications	Reminders & notifications	Reminders & notifications
	REALTORS <sup>®</sup> Branding	Personalized branding	Personalized branding
	Strikethrough		Collect Payments
			Advanced fields
			Signer attachments
			Bulk Send

## In Conclusion

Rigorous documentation and recordkeeping will be key for funeral director compliance during this State of Emergency.

In addition, licensees may want to consider keeping additional notes in the files that are not required by regulation. Notes should include dates and times of telephone calls or voicemails, copies of emails and text messages. This may be considered going above and beyond, but a court of law might look at this to determine how a reasonable and prudent funeral director conducted business during a state of emergency.

Although Managers-of-the-Day (MODs) are working remotely and are available Monday through Friday from 9 a.m. to 5 p.m. to assist you,

**please do not contact a MOD regarding specific DocuSign**

OR

**individual computer hardware/software questions**

as they are focused on funeral specific

member and government authority issues during this state of emergency.



[www.njsfda.org](http://www.njsfda.org)

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