

This Lesson explains how to apply for a Select Provider Network (SPN) and use DocuSign to complete the Sign and Return portion of the application.

1. Login to ServiceLive, Dashboard will display.
2. Scroll to Communication Monitor:

Note: Communication Monitor only appears when you receive a new invitation.

- a. From – The Buyer who is sending you the SPN invitation.
- b. Subject – The name of the SPN you are being invited to.
- c. Date/Time – When the invitation was issued and when it expires.

Note: Invitation expires at midnight the day before the expiration date and are shown in grey.

The screenshot shows the ServiceLive dashboard with the following sections:

- Dashboard** (Navigation tabs: Dashboard, Service Order Monitor, Order Management, Administrator Office)
- Performance & Profile Statistics**: Ratings (0), Not Yet Rated, Lifetime Rating
- Service Order Statistics**: 0 - Today, 0 - Accepted, 0 - Pending Cancel, Total Value Received: \$0.00*; 0 - Received, 0 - Bid Requests, 0 - Pending Reschedule; 0 - Problem, 0 - Bulletin Board
- ServiceLive Status Monitor**: Firm Registration Status (Registration Complete), Provider Registration Status (Approved: 0, Unapproved: 1), Provider Background Checks (Not Started: 0, Pending Submission: 1, In Progress: 0, Not Cleared: 0, Clear: 0, Re-Certification Due: 0)
- SPN Monitor**: View »
- Sears Holding Facilities Management**: Sears RE Facilities DocuSign Test, Membership Status Incomplete
- Member Offers**: More »

The **Communication Monitor** table is highlighted with blue arrows and letters:

From	Subject	Date / Time
Sears Holdings	You are invited to Sears Home Services Electrical Services Select Provider Network	06/11/2015 15:06 PM CDT Expires: 07/31/2015
Sears Holdings	You are invited to Sears Home Services Plumbing Services Select Provider Network	06/11/2015 15:06 PM CDT Expires: 07/31/2015
Sears Holdings	You are invited to Sears Retail Installation - Water Pump Select Provider Network	06/11/2015 21:06 PM CDT Expires: 06/30/2015

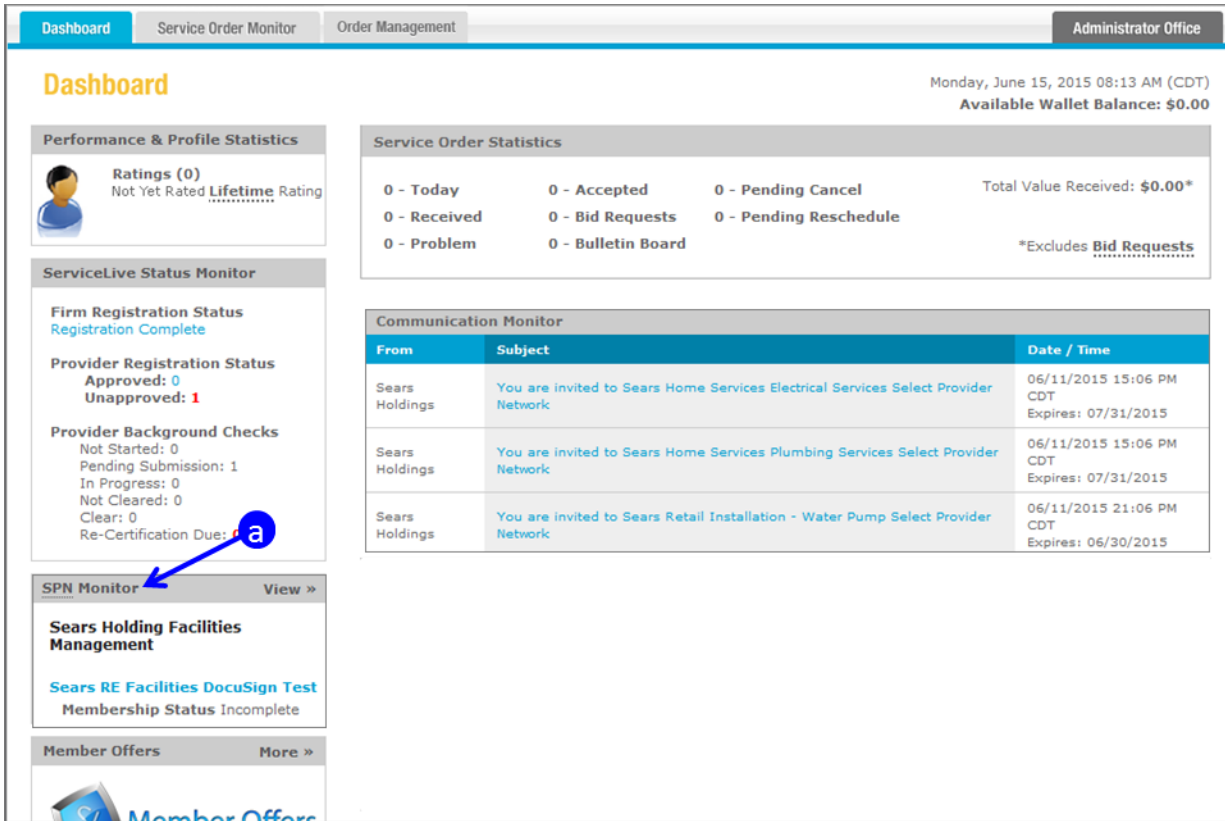
Annotations: 'a' points to the 'From' column, 'b' points to the 'Subject' column, and 'c' points to the 'Date / Time' column.

Continue to next page.

3. View SPN Monitor:

Note: SPN Monitor will not appear unless you have accepted a SPN invitation.

- a. Scroll down to view SPN Monitor on left side of screen.



- b. SPN Buyer – Company who is inviting you to their SPN.

- c. Name of SPN.

Note: You can click on the blue link to view SPN details.

- d. Membership Status:

Note: For questions on any of these statuses, contact the Buyer from information within the SPN invite email.

- Incomplete
- Pending Approval
- Decline
- Out of Compliance (Inactive)
- Member
- Blank (Means Removed from SPN)

- e. You can click on View to view SPN Monitor.



4. Respond to SPN Invitation:

- a. From Communication Monitor, click on blue link for the SPN.

Communication Monitor		
From	Subject	Date / Time
Sears Holdings	You are invited to Sears Home Services Electrical Services Select Provider Network	06/11/2015 15:06 PM CDT Expires: 07/31/2015
Sears Holdings	You are invited to Sears Home Services Plumbing Services Select Provider Network	06/11/2015 15:06 PM CDT Expires: 07/31/2015
Sears Holdings	You are invited to Sears Retail Installation - Water Pump Select Provider Network	06/11/2015 21:06 PM CDT Expires: 06/30/2015

5. SPN Invitation Example:

You will receive an email when you have been invited to a SPN. To access invitation login to ServiceLive and view Communication Monitor. An email will be sent to your Provider Firm when you are invited to a SPN, the invitation link will appear in their **“Communications Monitor”** section within the Provider Firm’s Admin dashboard only. The following is a sample of the initial message Provider Firms receive from Communication Monitor and steps they follow to take action on invitation.

- a. Buyer Logo.
- b. Buyer Contact Information.
- c. Initial Invitation Message
- d. Learn More about the SPN by clicking on the attached documents.

Note: This is the document informational section of the SPN Invite. This information is related to the application.

The screenshot shows an email invitation from Sears. Callout 'a' points to the Sears logo. Callout 'b' points to the contact information: Retail Installation Recruiting, c5556rec@searshc.com, 888-850-2336. Callout 'c' points to the main invitation text: 'You are invited to join Sears Retail Installation - Water Pump Select Provider Network'. Callout 'd' points to the 'Learn More' section which contains three links: 'Contractor SignUp Package', 'How to Join Instructions', and 'Sears Retail Installation SPN Introduction'. Each link is followed by '(Adobe Acrobat file, requires Acrobat Reader to open)'.

e. SPN Required Criteria

Note: SPN Required Criteria is what is required of your Firm (Company) and your Service Providers in order to become a member of the SPN.

f. Click on [View Company Requirements](#) link.

Note: See step 5k to view Company Requirements.

g. Click on [View Provider Requirements](#) link.

Note: See step 5l to view Provider Requirements.

h. Documents you will need to provide when you apply to SPN Membership.

i. Click on **APPLY FOR MEMBERSHIP** button accept SPN invitation and move forward in the application process.

j. **OR** click on [No Thank You](#) link to decline SPN Invitation.

Note: If you're not interested please be sure to decline the invitation so they Buyer knows whether to continue pursuing your application or not.

Membership Criteria & Credentials

Below are the required criteria and documentation to required for membership. Click "Apply For Membership" below to begin.

An asterix (*) indicates credentials that must be verified by ServiceLive for membership. See the [ServiceLive Verification Guide](#).

Required Criteria

Select a criteria level below to see how you qualify for this SPN.

[View Company Requirements](#)

[View Provider Requirements](#)

Documents

When you apply, you will need to provide these documents. Click to view and print.

Status	Required Documents
Incomplete	Authorized Servicer SPN Application Documents (PDF)
Incomplete	Subcontractor Authorization Rider Documents (PDF)

[No Thank You](#)

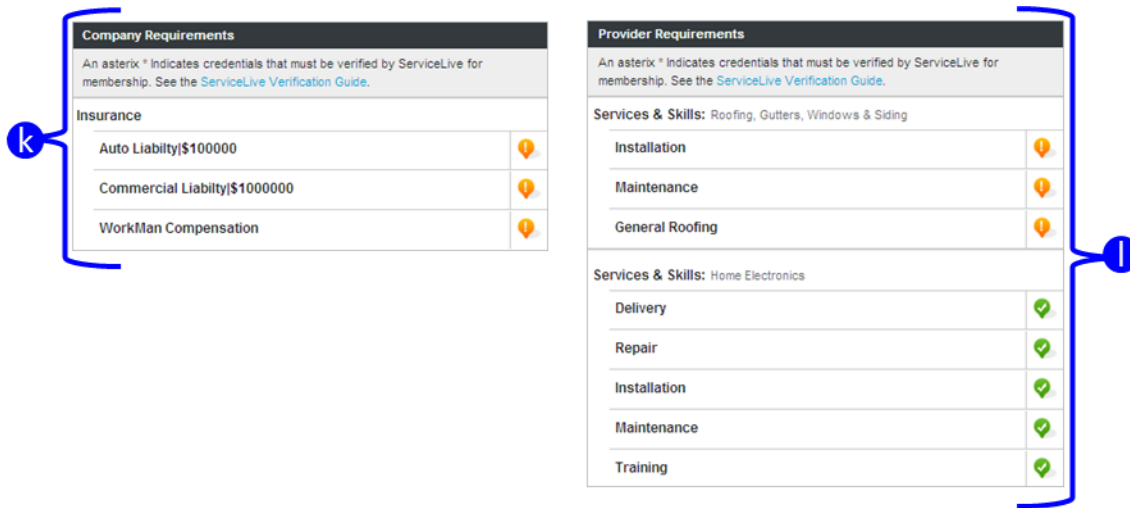
APPLY FOR MEMBERSHIP

Callouts: e points to 'Required Criteria', f points to 'View Company Requirements', g points to 'View Provider Requirements', h points to the 'Documents' table, i points to 'APPLY FOR MEMBERSHIP', and j points to 'No Thank You'.

Continue to next page.

- k. When you click on [View Company Requirements](#) , Company Requirements will display.
- l. When you click on [View Provider Requirements](#) , Provider Requirements will display.

Note: Profiling each Service Pro who is going to accept work on the specific SPN is important because it could be the difference between becoming approved or not.



Apply for Membership:

1. Click on **APPLY FOR MEMBERSHIP** button to accept the SPN invitation and move forward in the application process.
2. SPN you are applying for will automatically expand on the SPN Monitor.
3. Click to Agree:

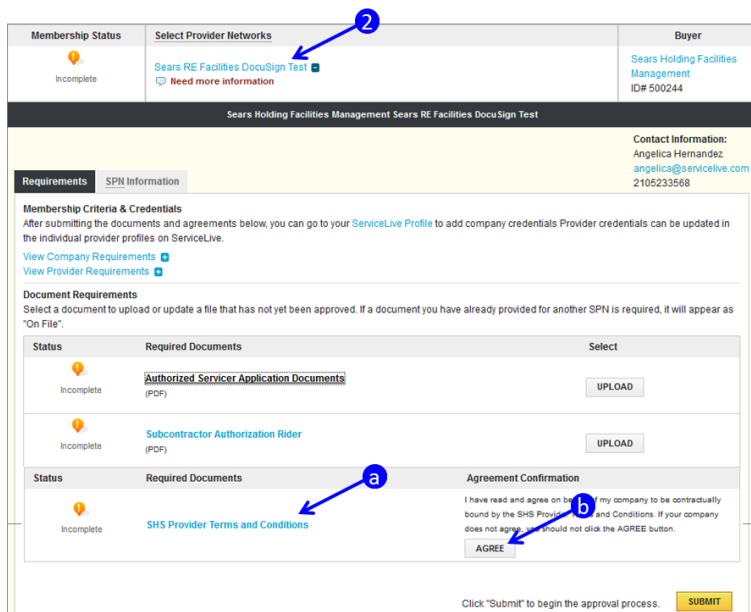
Note: This is action is legally binding. Please be sure you read all documents before agreeing.

- a. If there are Terms & Conditions, click on the blue link labeled Terms & Conditions.

Note: A PDF of Terms & Conditions will open. Read document and then close document.

- b. Click on **AGREE** button, to Agree to Terms & Conditions.

Note: Cannot click on **“Agree”** button until you open PDF document.



4. Sign and Return:

Note: These documents are also legally binding and require that the applicant return a **signed** acknowledgement to the Buyer. To make this process easier we have implemented DocuSign. DocuSign allows us to leverage technology to replace the manual process requiring printing of documents, manual writing, scanning and uploading documents.

- a. Click on blue link to open PDF.

Status	Required Documents	Select
Incomplete	Authorized Servicer Application Documents (PDF)	UPLOAD
Incomplete	Subcontractor Authorization Rider (PDF)	UPLOAD

- b. PDF will open.

- c. Click on blue hyperlink at bottom of page to access required application documents in DocuSign.

Authorized Servicer Introduction Letter

We are excited to know that you are interested in joining our **Sears Retail Installation** Select Provider Network (SPN)! Our goal is to have you on-board as soon as possible. To assist you with expediting the SPN application process, we use DocuSign to assist you with completing all documents requiring signature. DocuSign is an electronic document replacement for manual documents allowing you to complete faster and easier. This Authorized Servicer SPN Application packet is one of two documents that you will need to complete as part of your application into our Select Provider Network (s).

In this packet you will find the following documents, each composed of one or more pages:

- Authorized Servicer Agreement (page 2-18)
- Appendix A (page 19-leave blank)
- Appendix B (page 20)
- Appendix C (page 21-23)
- Women & Minorities Questionnaire (page 24)

Once completed, follow the steps below to save a PDF copy of the documents, and upload as part of your SPN application:

1. Click the **Show Document** button
2. **Save** a PDF copy for your records by clicking **Save** on the **File Download** pop-up window.
3. Finally, upload a copy to the Authorized Servicer Sign & Return section of the SPN application.

Click the URL link below to access:

[Authorized Servicer SPN Application Documents](#)

If you need assistance, we are glad to help. Please contact our **Sears Retail Installation Contractor Compliance** team via email at C5556CC@searshc.com with questions related to this Select Provider Network.

If you need assistance with completing these documents in DocuSign, please contact ServiceLive SPN Support Team at 1-888-549-0640 and select option 4.

- d. DocuSign website will open.
- e. Enter your first name and last name, and your email address.
Note: Sign with full name (i.e. Joe Smith) NOT with Business name (i.e. Joe's Plumbing)
- f. Click on **Begin Signing** button.

PowerForm Signer Information

Please enter your name and email to begin the signing process.

Your Role:
Contractor

Your Name:

Your Email:

Begin Signing

Annotations: Blue arrows labeled 'e' point to the 'Your Name' and 'Your Email' input fields. A blue arrow labeled 'f' points to the 'Begin Signing' button.

- g. Begin reviewing document.

Please Review & Act on These Documents DocuSign

Angelica Hernandez
Sears, Roebuck and Co.

Please review & sign your document. To begin the process of reviewing and signing your documents, please click the button below. Signing will not be complete until you have reviewed the agreement and you have confirmed your signature.

I agree to use [Electronic Records and Signatures](#) **CONTINUE** OTHER ACTIONS ▾

- h. Select **"I agree to use Electronic Records & Signatures"** checkbox.
- i. Click on **CONTINUE** button.

I agree to use [Electronic Records and Signatures](#) **CONTINUE**

Annotations: Blue arrow labeled 'h' points to the checked checkbox. Blue arrow labeled 'i' points to the 'CONTINUE' button.

- j. Read through document and then click on **START** button.

Please review the documents below. OTHER ACTIONS ▾


START DocuSign Envelope ID: 0F0553B2-C1FC-41E5-A748-B7D6DA159E2E

Sears

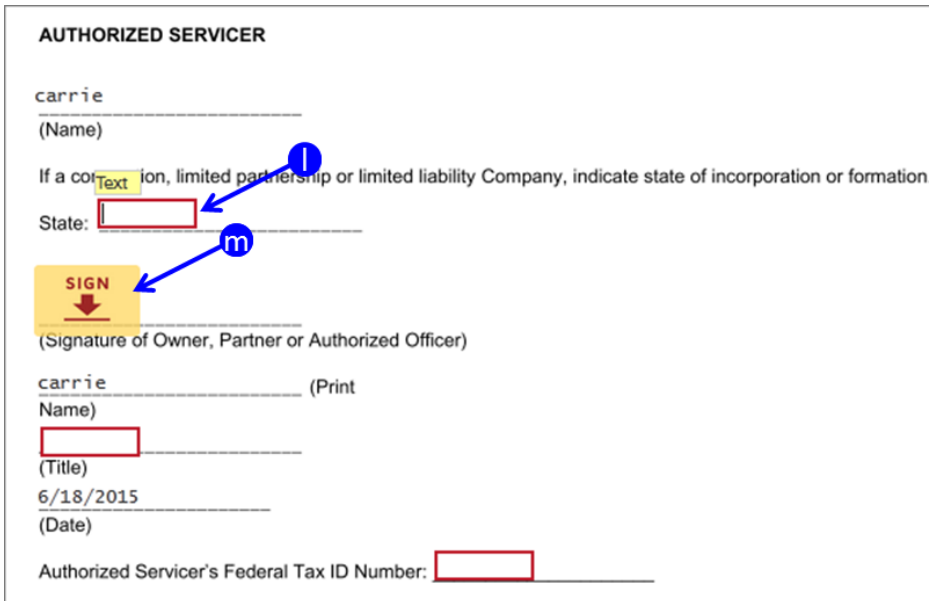
Authorized Servicer Introduction Letter

Annotation: Blue arrow labeled 'j' points to the 'START' button.

- k. Once you click on **START** button, the system will bring you to the first thing you need to fill in.

- l. Red boxes indicate required fields.
- m. To sign the document, click on  button.

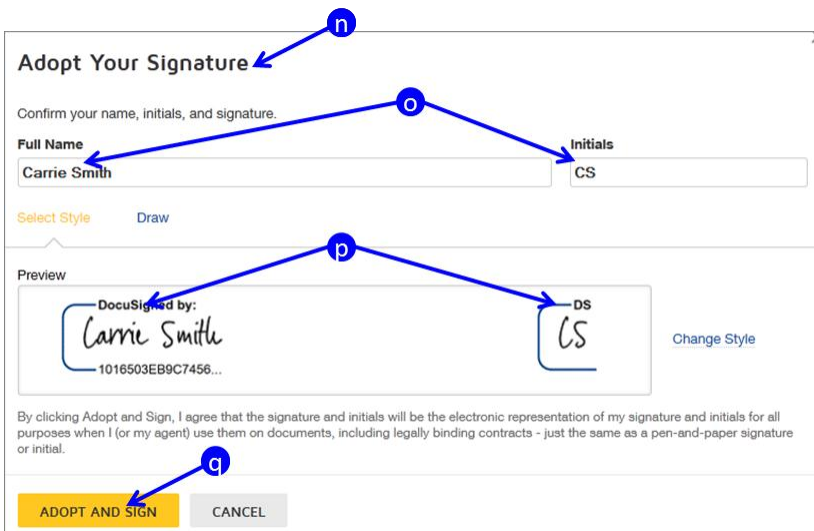
Note: The first time you sign, you will be required to Adopt your Signature. See next step.



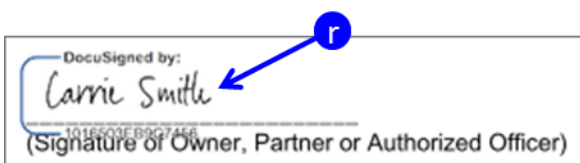
- n. Adopt your Signature screen will appear the first time you sign a document.
- o. Check that your Full Name AND Initials are correct.

Note: If you entered information incorrectly when starting the DocuSign process, now is the time to correct it.

- p. Preview what signature will look like when signed.
- q. Click on **ADOPT AND SIGN** button.



- r. Signature will insert into document.



- s. Click on **FINISH** button at bottom of page.

Note: Finish button will not appear until all required fields are complete.

- t. Click on **SHOW DOCUMENT** button to **Save** the copy of the document to be uploaded with your SPN application.

Note: It is recommended that you Save document to Desktop for easy access to saved file.



5. Other Actions:

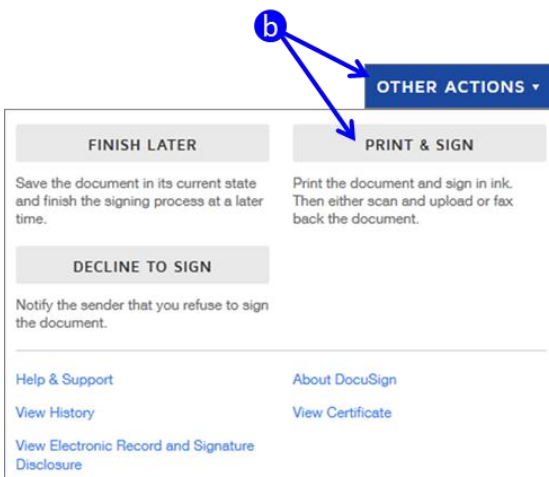
- a. Finish DocuSign Later:

Note: Although this option is available, using this feature means losing all information completed thus far. When **Finish Later** is clicked, the document completion is cancelled and Provider will have to start over by clicking the same **invitation link**.



- b. Print & Sign Later:

Note: This is NOT an authorized option and should NOT be used, as this would require you to manually complete the forms, scan, and upload to the SPN. Instead follow step 4s & 4t.



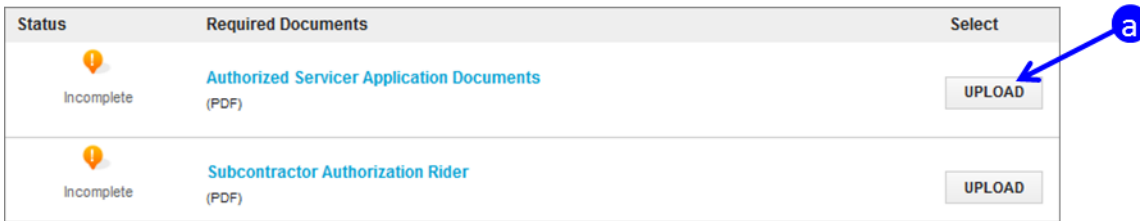
c. Decline to Sign:

Note: In certain cases, you may decide to decline signing the required documents. If you do this, you will not be admitted to the SPN. If at any time you change your mind you can access the documents to reapply as long as the invitation is not expired.



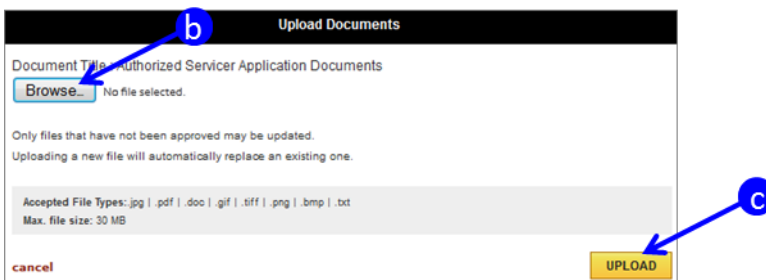
6. Upload Documents:

a. Once back on the SPN Monitor page, locate the document you just signed and click the "Upload" button.



b. Click on "Browse" button and locate the PDF you just saved.

c. Click on **UPLOAD** button.



d. Repeat steps 6a-6c for all documents.

Continue to next page

- e. Once files are uploaded document status will change to **Pending Approval**.
- f. Once all requirements are complete, remember to click on **“Submit”** button to send application to Buyer for review.

Note: If the application documents do not meet the Buyer’s compliance requirements, you will receive a system generated email notification and the document(s) status will change from Pending Approval back to Incomplete.

