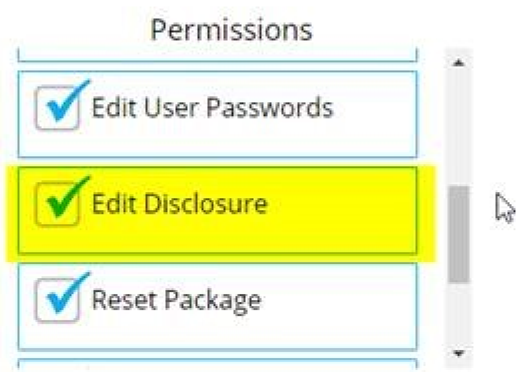
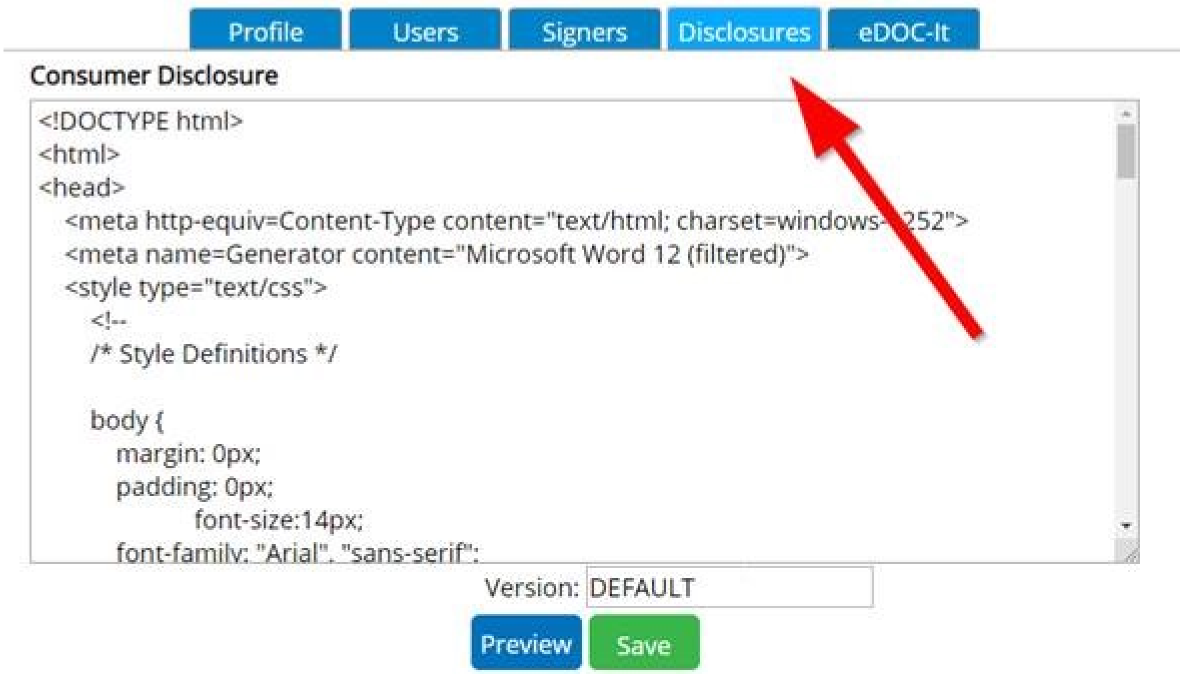
Tech Tip #43: How to Edit the eDOCSignature Disclosure

These settings and features may not be available for all clients. If you do not see them, please contact your solution provider.

The **Edit Disclosure** permission has been granted to one of your credit union's administrators. Your administrator is the person who received the welcome letter from our team when your credit union was implemented. You will find the ability to grant this permission to other staff members in the **Settings** menu under the **Users** tab. The **Edit Disclosure** permission is located on the **Permissions** list:



The disclosure form covers all legalities when sending/signing an e-document. Your credit union can edit this disclosure as you see fit. However, you will first need to have the **Edit Disclosure** permission granted to your user account as mentioned above. In order to view the current disclosure, you can navigate **to eDOCSignature > Settings > Disclosures tab**. You will notice the text is in HTML format; this format needs to be used when making changes to the form. You can use the **Preview** button on the bottom of the page to test any changes before saving.



Lastly, you will notice your disclosure **Version** is currently listed as **DEFAULT**. This is to identify if the disclosure is the base version supplied by eDOC, or if a new altered version is being used by your credit union. If there is any accidental change made to the disclosure, or if the disclosure no longer displays correctly, you can reach out to our support team who can then revert your disclosure version back to **DEFAULT**.