blue california | promise HEALTH PLAN

Getting Started with DocuSign

Introduction

BlueShield of California (BSC) instance of DocuSign has a set of customized applications for both BlueShield of California (BSC) and BlueShield of California – Promise(PHP).

Brokers/Agents/Sales Representatives are to use only those applications they are approved to sell (BSC or PHP).

- Some Brokers/Agents are approved to sell both BSC and PHP.
- If a Broker/Agent/Sales Representative sells a product for which they are not approved to sell, they will not receive credit and/or a commission for the sale.

IMPORTANT:

External Brokers need to add their Tax ID and NPN to all applications.

Terms

Envelope:

- This is a transaction generated within the application.
- More than one application can be created in a single envelope.
- **Note**: envelopes are limited. Please **do not** cancel unless actually necessary. When an envelope (application) is canceled after being sent and a new envelope (application) is sent multiple envelopes are consumed.

Template:

- A blank, fillable application within DocuSign.
- Each application type has a template created for use.
    - Note: Several applications have additional templates for use when there are multiple applicants

Recipient / Prospect:

- Depending on the screen one of these two terms will be used to refer to the individual(s) completing the application for specific coverage.

Buttons:

- A radial button is circular selection point on the application. Only one option is allowed when a radial button is used.
- A checkbox is a selection box used in various places on the application. Checkboxes will allow multiple selections.

Signatures

DocuSigned by:

This is the signature either the Salesperson or Prospect create to use.

Requesting Access as an External Broker

External Brokers requesting access to Blue Shield of California's DocuSign, will need to complete the access request form.

Note:

This form is only necessary if the Broker has not already setup in the system.

If you need to confirm that your access has been completed, please email:

MedicareBroker
@Blueshieldca.com

DocuSign – External Broker Access Request

Producer Details

Broker Information

Last Name | First Name | Middle

Tax ID or Social Security Number | NPN

Mailing Address

Street

City | State | Zip Code

Phone Number | Email Address

Optional

FMO Name | FMO Tax ID#

Please email the completed form to MedicareBroker@blueshieldca.com.
Processing takes 3-10 business days.

blue california

Steps

1. External Brokers should request the electronic form be emailed to them.
2. Upon receipt, the Broker will need to complete the form, and email back to Blue Shield of California.

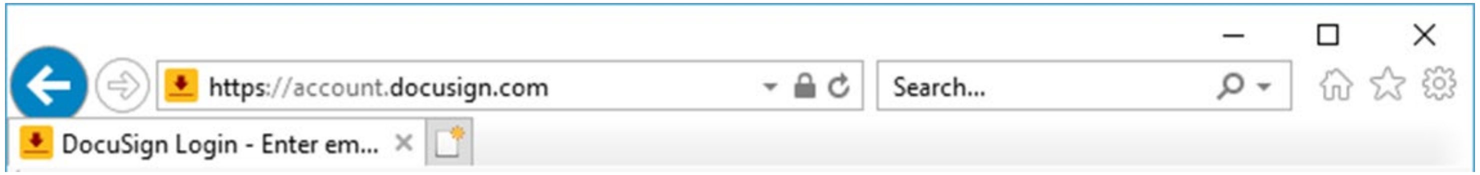
   Email the completed form to:
   MedicareBroker
   @Blueshieldca.com

Accessing the BlueShield DocuSign Site

1. Activation
   - Brokers must activate their accounts using the Activation email the system sends to them.
2. Use the internet address to access the Blue Shield of California's DocuSign.
   - Copy and past this to your "address line" for the internet.

     or

     Create a shortcut on your desktop using the above as the "location."



Production Location: https://account.docusign.com

System Requirements

An email address is required for both the Broker and the Recipient

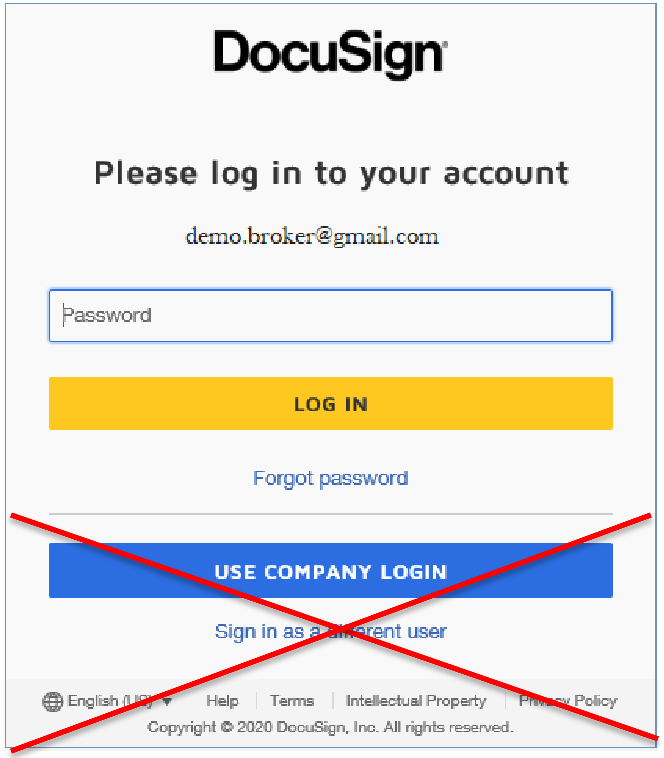
Using email, DocuSign can be used on the following devices:

- Personal Computer (Desktop or Laptop)
- iPad / Tablet
- Smart Phone (IOS or Android)
  - Note: Text will not work

Logging In

When accessing the site for the first time you will be asked to enter your email address.

1



Do not use Company Login

Steps

1. Enter the full email address and then click <Continue>

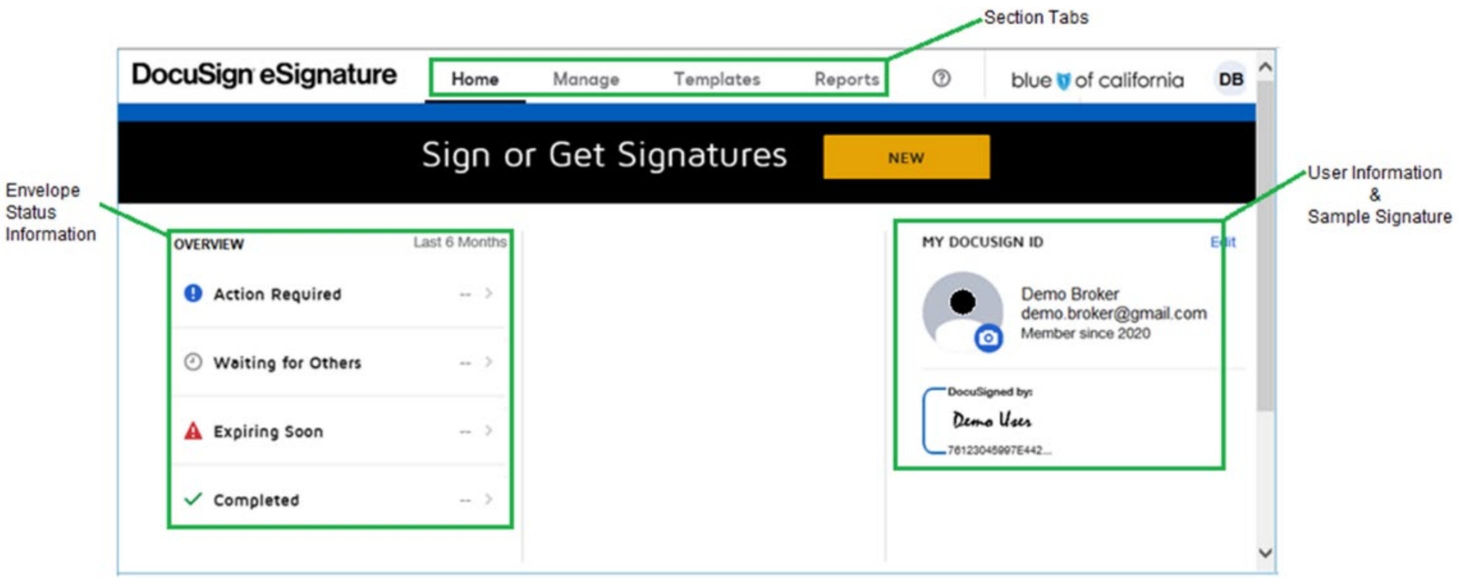
Note: You will only create your password the 1st time you login.

If you forget your password, use the Forgot Password link below the Log In button to request a new password.

Home Page Components

When you log-in, the home page displays.

The Envelope Status information is like a dashboard. It tells you which items you should focus on (i.e. action required and expiring soon).



Note

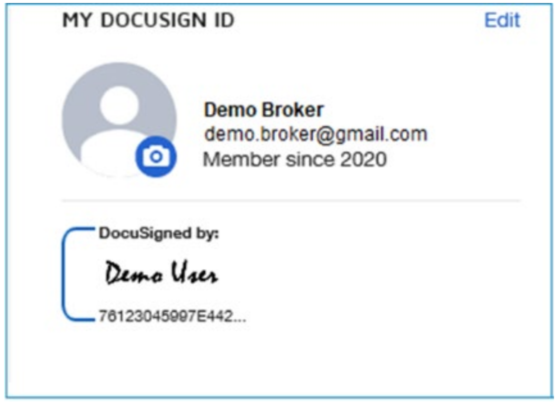
Some items such as the “My DOCUSIGN ID” won’t need to accessed once the initial entries such as Profile and Signature(s) have been setup.

Updating Your Profile

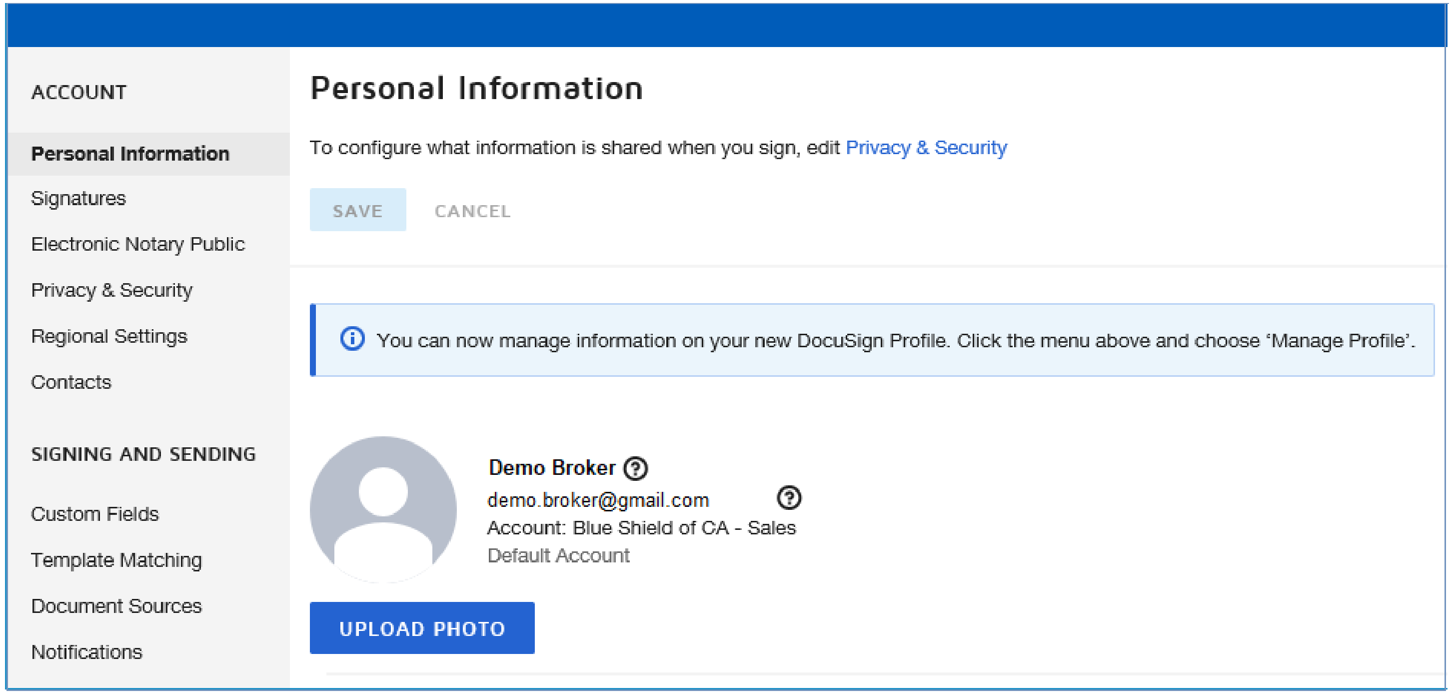
The first thing the Broker will need to do is complete your user Profile and DocuSign Signature.

This information in located in the "**MY DOCUSIGN ID**" section.

1



2

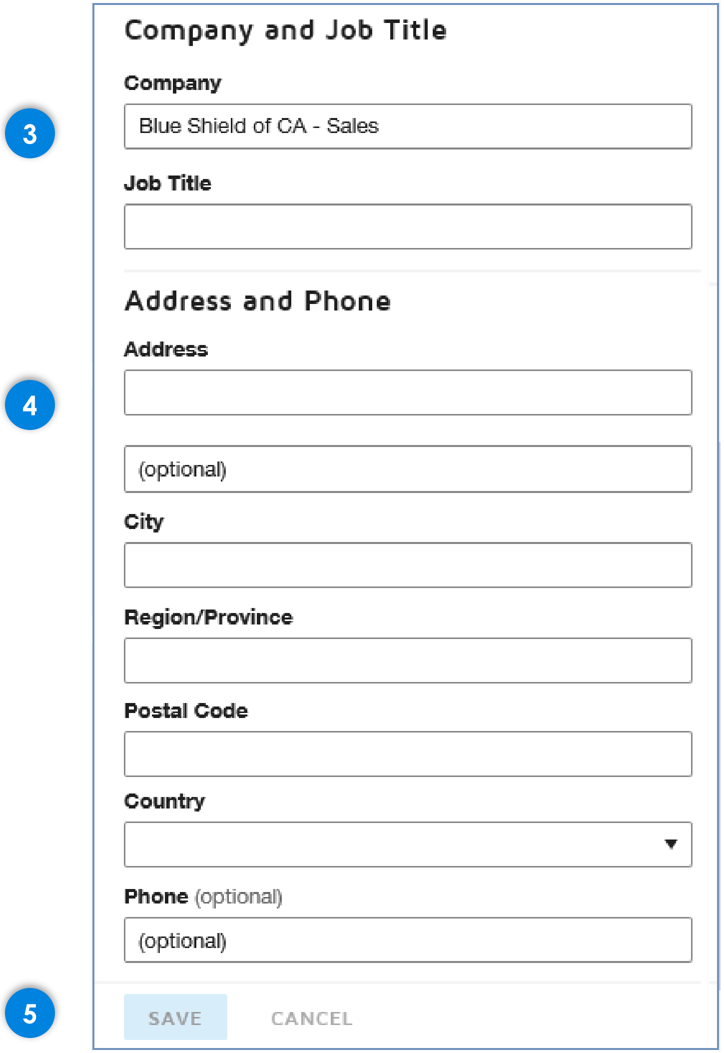


Steps

1. To update your profile and create your "signature" click on <Edit>
2. The "Personal Information" screen will display on the top portion of the page. As you scroll down the page you will see two additional sections where you can add "*Company and Job Title*" as well as "*Address and Phone*" information.

Updating Your Profile

This only needs to be completed the first time you use the application or when any of your personal information needs to be updated.



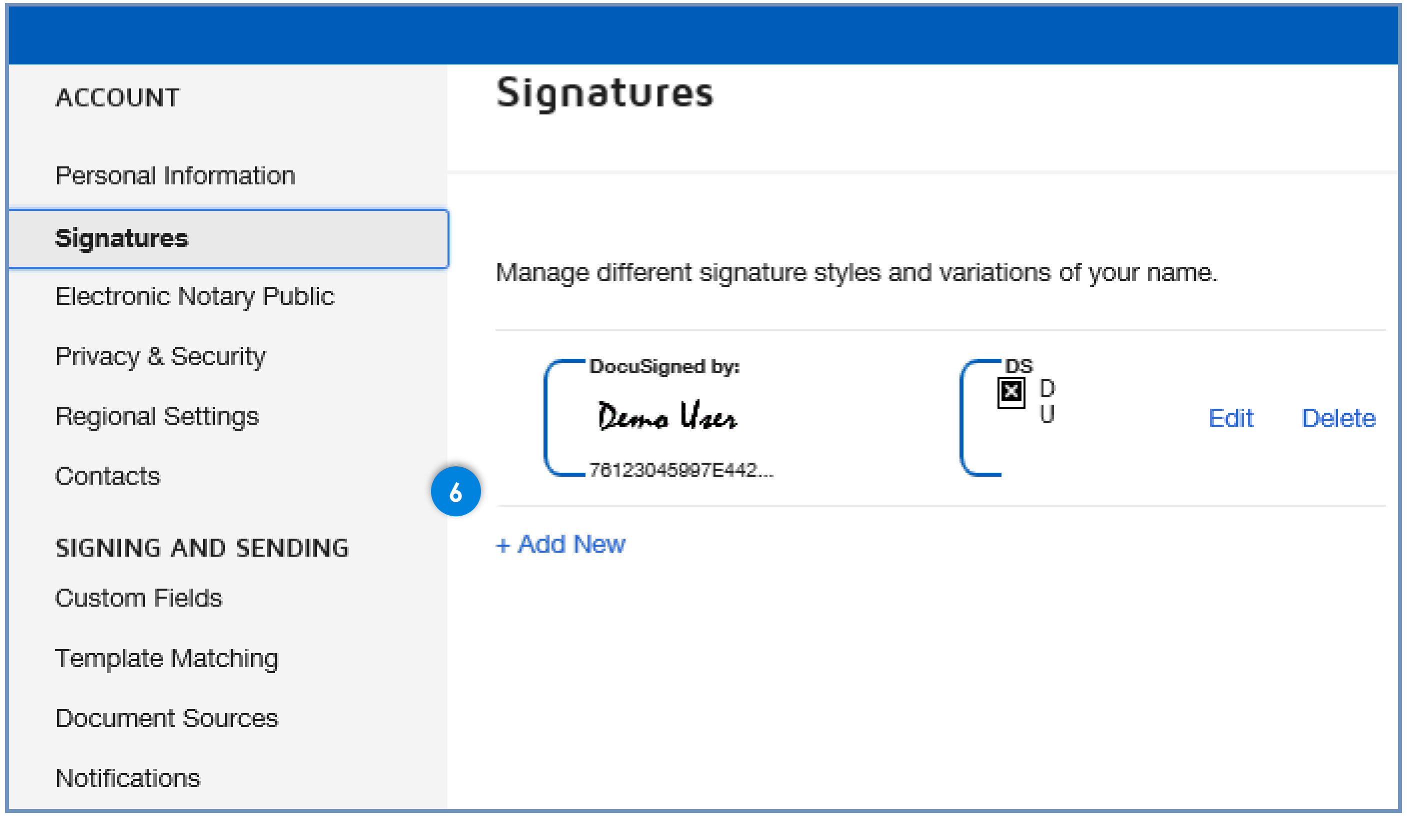
Steps

3. Fill in your Company and Job Title.
4. Next, fill in your Address and Phone number.
5. Once all updates are completed, click the <Save> button

Creating the Brokers Signature

After saving your personal information, click on Signatures selection located in the left navigation bar.

The manage signatures pane will open to the right.

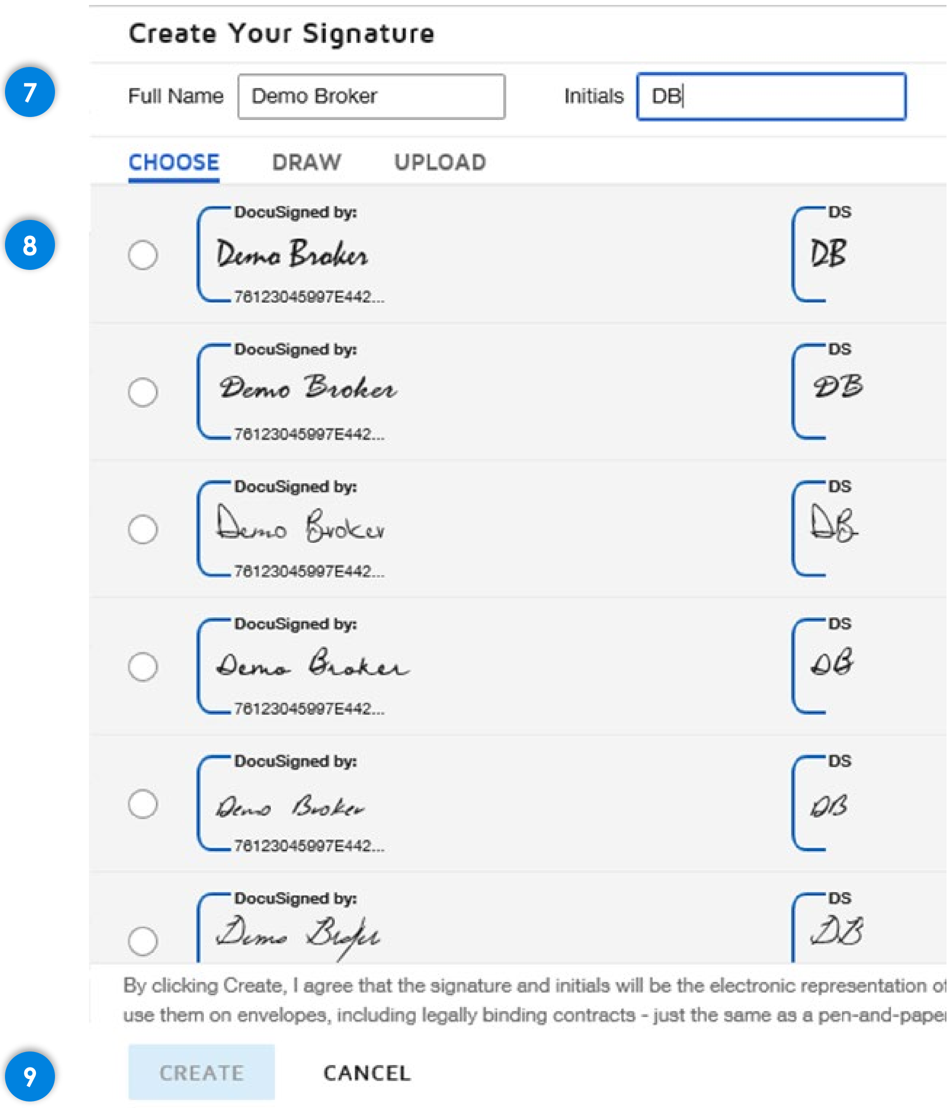


Steps

6. Next click on the +Add New to create your personal signature.

Creating the Brokers Signature

The manage signatures pane will open to the right.



Steps

7. If the “Full Name” is not correct, click into the box and type in the desired name.

   If the “Initials” need to be modified, click in the box and type in the correct initials.

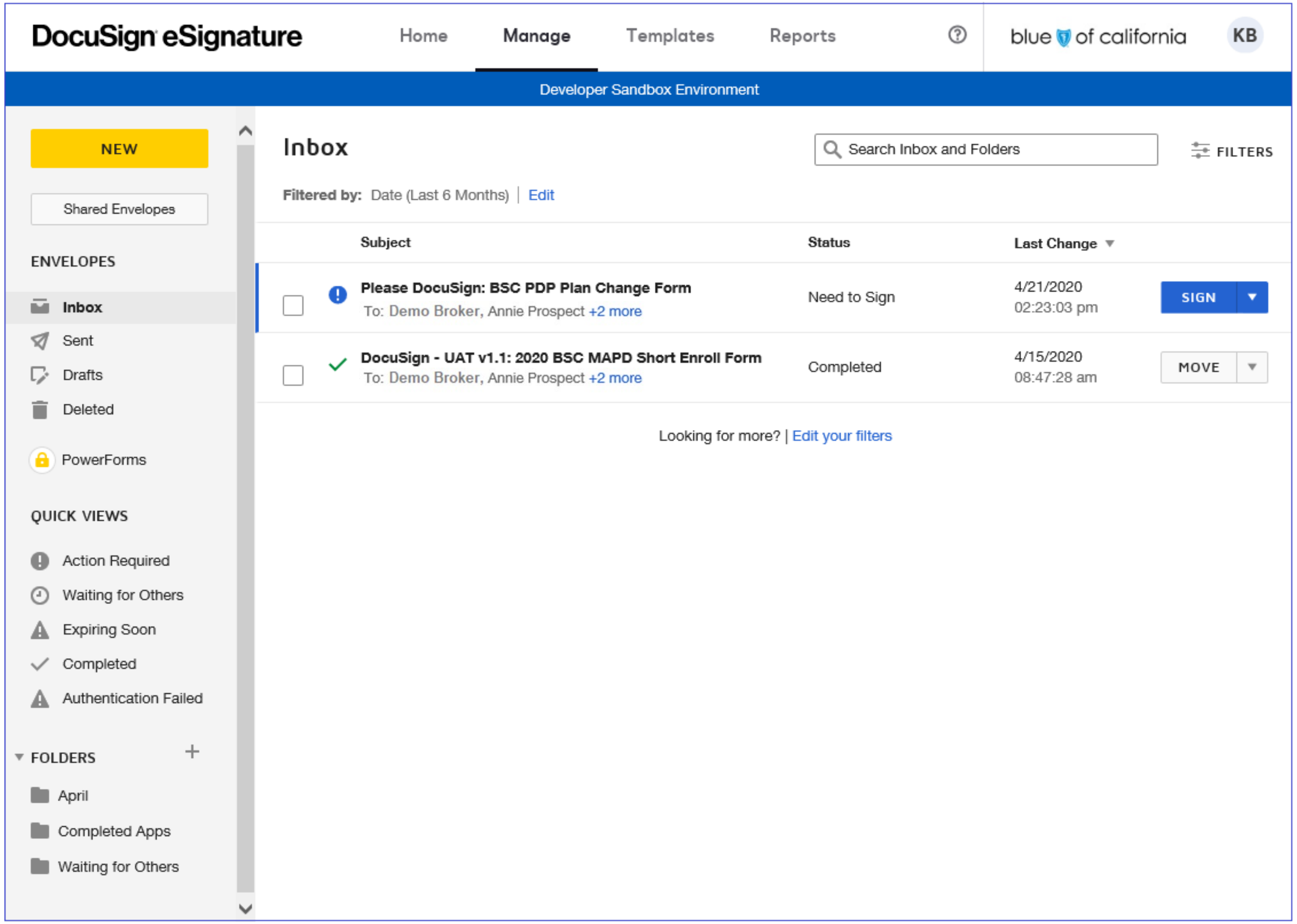
8. Click on the radial next to the set of name and initials sample you wish to use.

9. Last, click on <CREATE>. This will create the Signature and Initials to be used on documents and return you to the Signature screen.

Manage Screen

The Manage screen is used to manage your email.

1



Steps

1. To access this screen, click on the "Manage" tab located at the top of your screen.

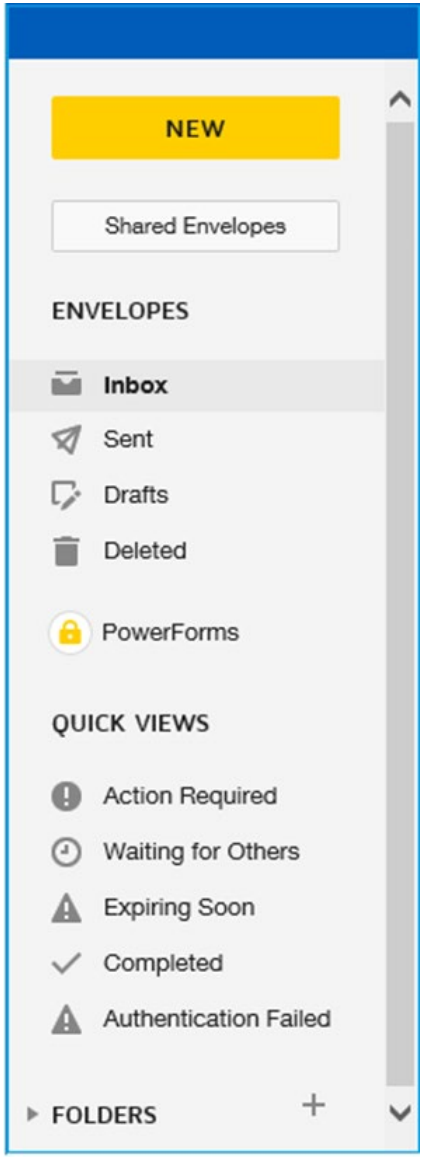
Manage Screen

The “left navigation bar” is used to access:

- Envelopes
- Quick Views
- Folders

Note:

Quick Views are available for access on the Home Screen.



Envelopes

This area allows the salesperson to easily check their Inbox and Sent emails.

Checking your Inbox

- This is where you will find email which were sent to prospects.
- You will have multiple actions available.

Quick Views

Each of the actions available provide a method for the user to easily locate envelopes in a particular status.

- Expiring Soon will allow the salesperson to easily locate those items where the prospect has not yet taken the necessary action(s).
- Authentication Failed allows the salesperson to easily locate those items where the prospect did not utilize the correct “Access Code.”

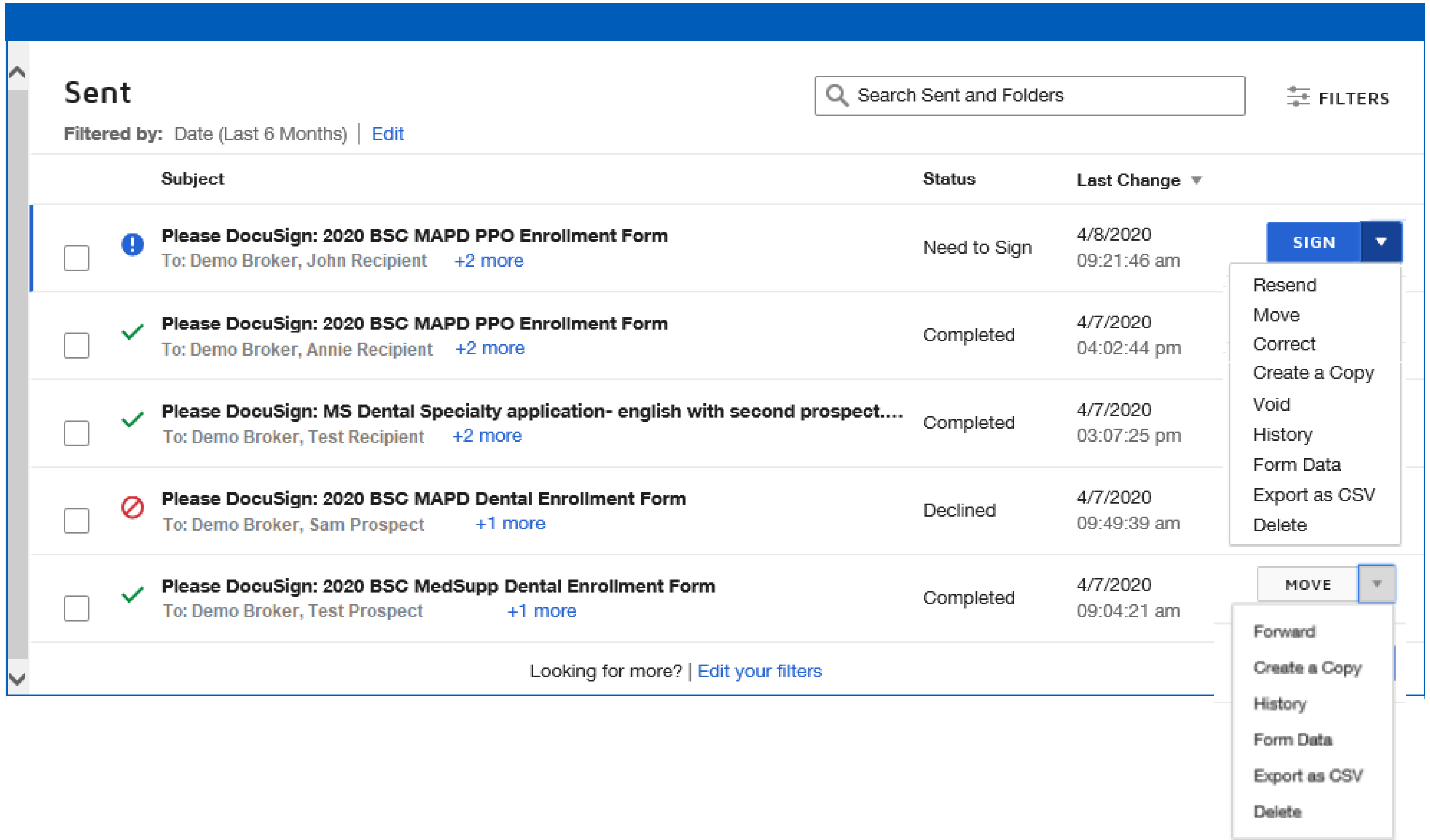
Folders

- Each person can create their own folders to easily store “Completed” or “Cancelled” applications (emails).

Inbox - Sent

Here is an example of what an Inbox might contain.

Note the different "Status" indicators.



Status Indicators

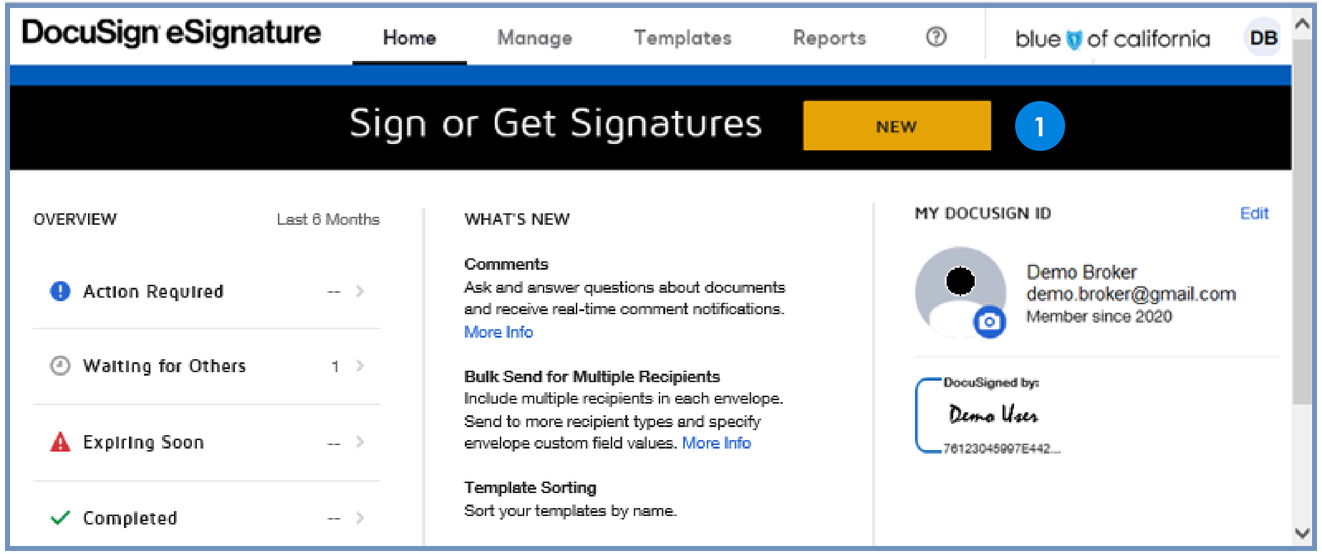
- Need to Sign
- Declined
- Complete

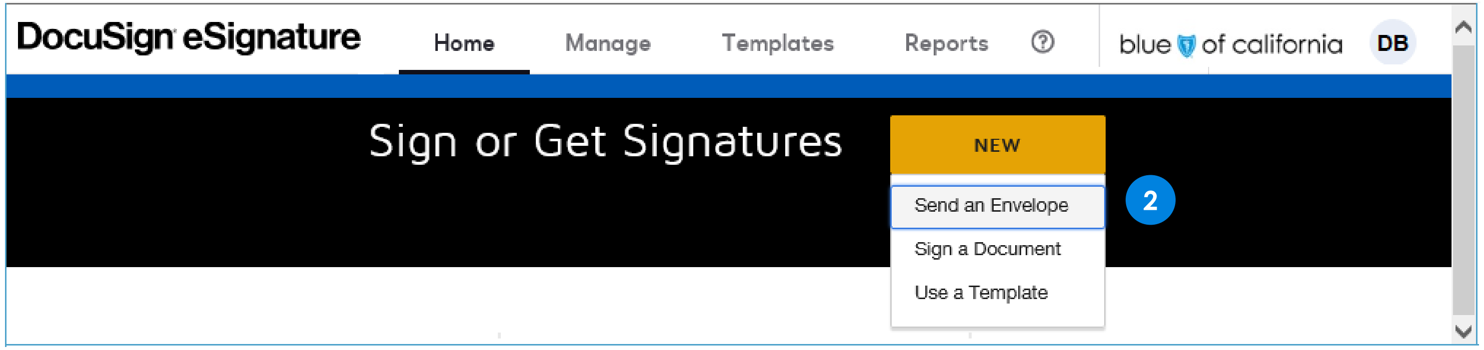
Start an Application

There are several methods for starting an application.

Note:

This is method 1. For alternative methods, please reference the Appendix section.





Method 1

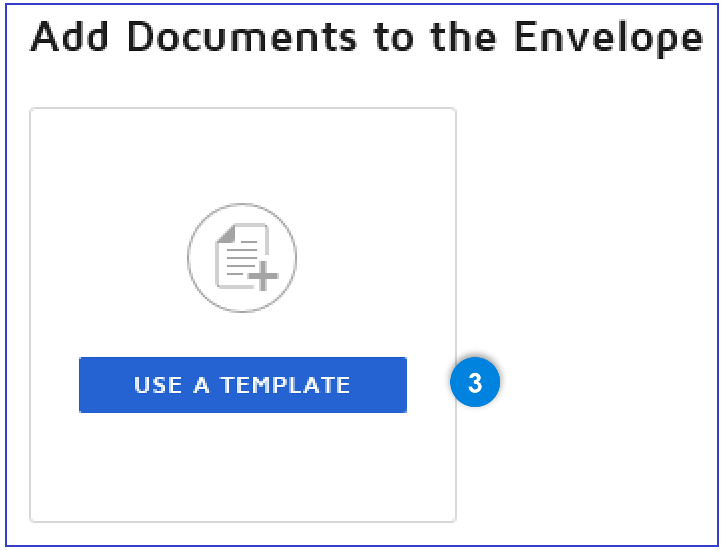
1. On the “Home” Page you will click on the <New> button.

   A dropdown will appear with several options.

2. From the drop-down list you will select <Send an Envelope>.

Add Documents to the Envelope

The "Add Documents to the Envelope" – "USE A TEMPLATE" will display.



Method 1

3. Click on the <USE A TEMPLATE> button.

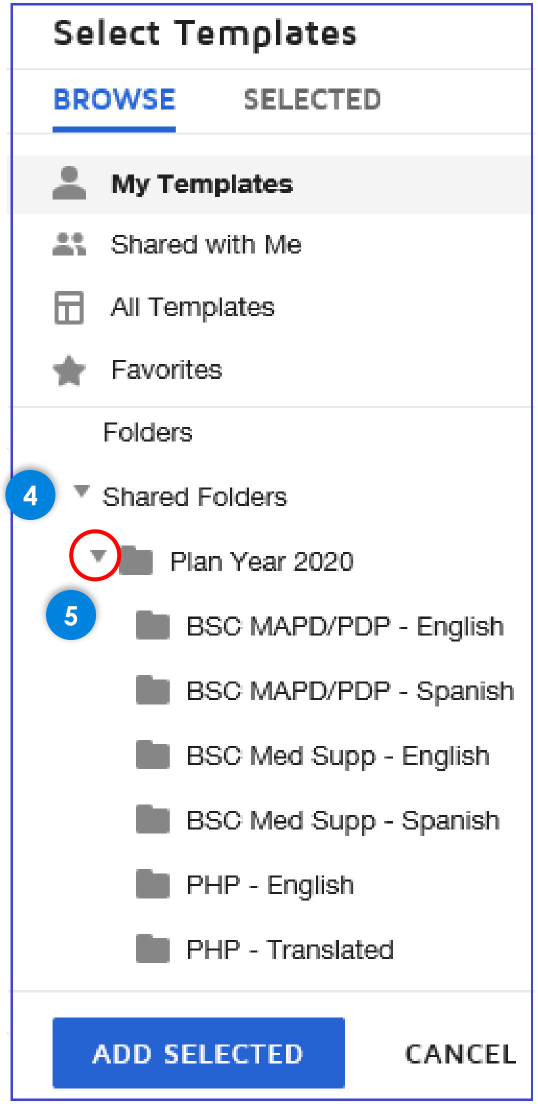
Note:

If you select <Use a Template> in the prior step, you are only able to select one application template and not multiple.

Add Documents to the Envelope

The “Select Templates” screen will display.

- Templates are placed into either a Blue Shield of California or Promise folder.
- The templates are located in folders based on category.



Steps

4. To expand the list of Folders, click on the ▶ next to “Shared Folders”.

   The Select Templates screen will display.

5. Select a plan type and language, then click on the corresponding folder to expand further.

IMPORTANT

You must click on the arrow to expand the folders.

Clicking on the folder or the name does not expand the folder list.

Expanded Folder View

Notice the English and Spanish versions are not located in the same folder.

- Shared Folders
  - Plan Year 2020
    - **BSC MAPD/PDP - English**

Name	Owner	Last Change
2020 BSC PDP Enrollment Form v 1.0	BSC Admin	4/9/2020 | 03:09:08 pm
2020 BSC MAPD Dental Enrollment Form v 1.0	BSC Admin	4/9/2020 | 03:09:05 pm
2020 BSC MAPD HMO Enrollment Form v1.0	BSC Admin	4/9/2020 | 03:09:05 pm
2020 BSC MAPD PPO Enrollment Form v1.0	BSC Admin	4/9/2020 | 03:09:04 pm

- Shared Folders
  - Plan Year 2020
    - BSC MAPD/PDP - English
    - BSC MAPD/PDP - Spanish
    - BSC Med Supp - English
    - **BSC Med Supp - Spanish**

Name	Owner	Last Change
2020 BSC Medicare Supplement Household Discount Enrollment Form v1.0	Myera Magsino	4/9/2020 | 03:09:07 pm
2020 BSC Med Supp Dental Specialty Household Discount Enrollment Form v1.0	Myera Magsino	4/9/2020 | 03:09:03 pm
2020 BSC Medicare Supplement Enrollment Form v1.0	Myera Magsino	4/9/2020 | 03:09:02 pm
2020 BSC MedSupp Dental Enrollment Form v1.0	Myera Magsino	4/9/2020 | 03:09:00 pm

6

ADD SELECTED | CANCEL

7

Steps

6. Select one or more templates from the same language folder.
7. Click the <ADD SELECTED> button

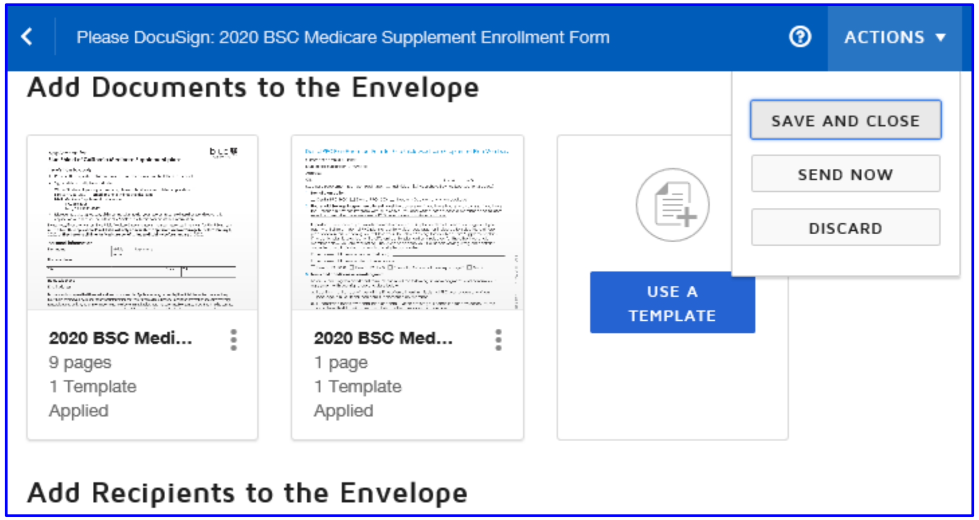
Add Documents to the Envelope

Once you have selected one or more templates and clicked "Add Selected", the Add Documents to the Envelope will redisplay.

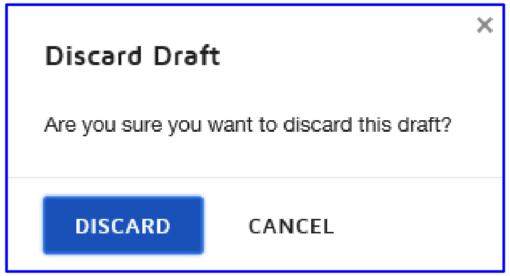
Note the tiny image of the document will display along with the name and number of pages, as well as the number of templates selected/applied.

If the Prospect is not yet ready to purchase you should stop at this point and save the template or Discard the blank template.

Otherwise **continue** to "Adding Recipients".



8



9

Steps

If you have selected the wrong template(s), you can discard them, if not sent.

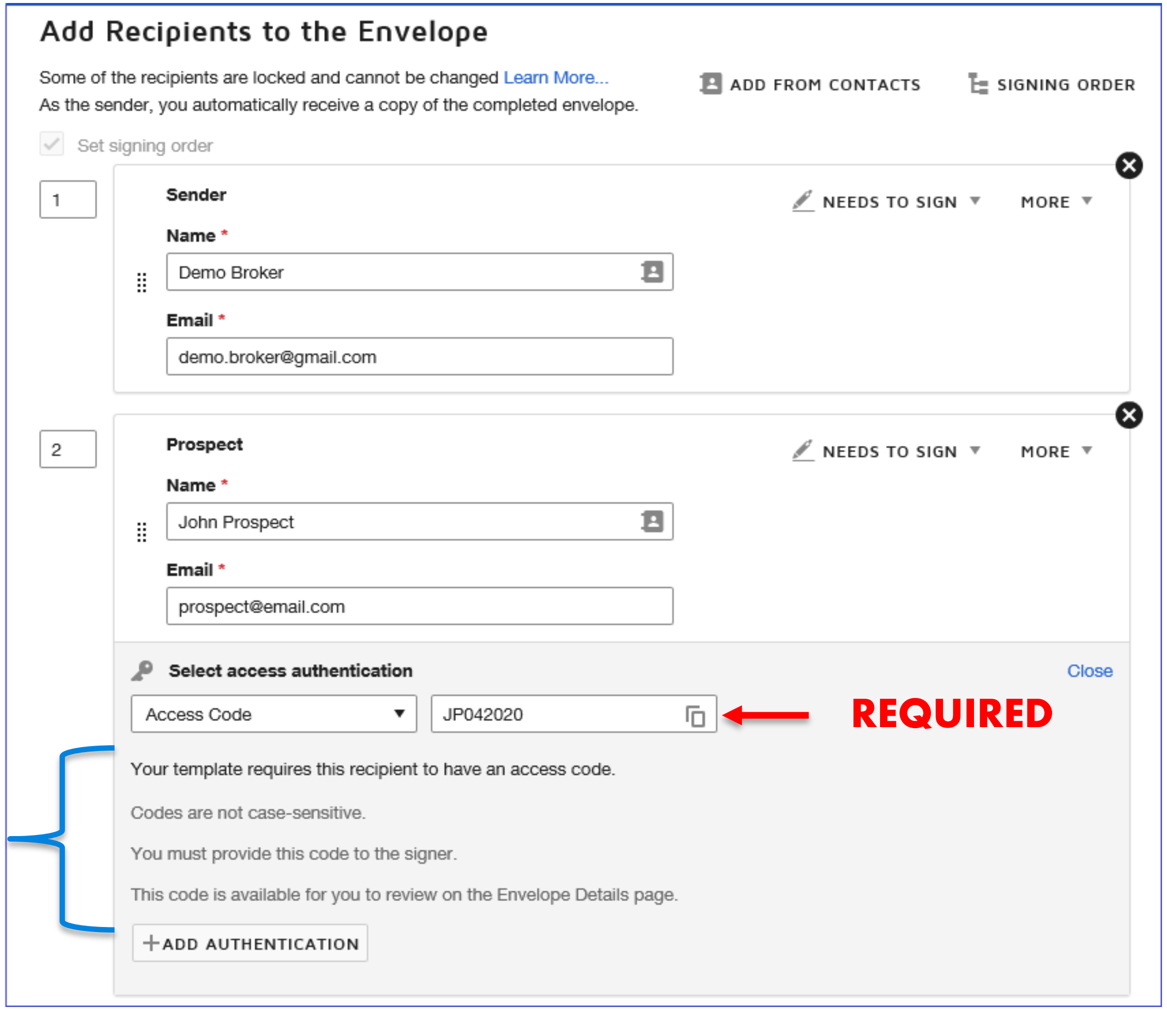
8. To delete the template(s) prior to send, click on the <ACTIONS> button in the top bar and then click the <DISCARD> button.
9. Discard Draft message will display. Click <DISCARD> again.

Add Recipients to the Envelope

After selecting the appropriate template(s), move to the "Add Recipients to the Envelope" section and fill in the Sender and Prospect information.

An Access Code is required. Give the code to the Prospect while on the Phone. Do not email it to them.

10



11

Important information

DO NOT USE any of the following:

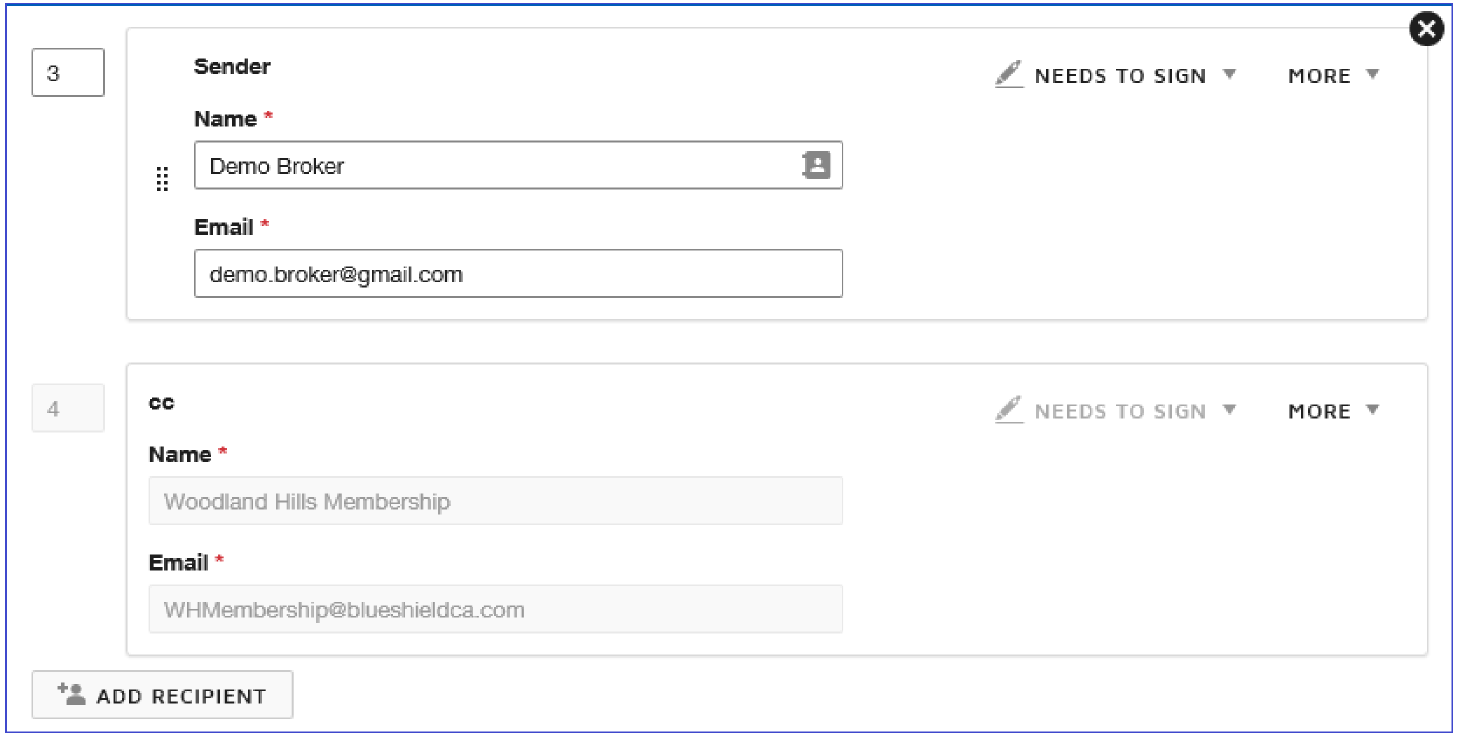
- The same number or numbers repeated (example: 121212)
- The same letter or letters repeated (example: aaaaaa)

Steps

10. Fill in the Sender and Prospect information
11. Use one of the following layouts for the Access Code.
    - Prospects initials plus their zip code.
    - Prospects initials plus the last 4 digits of their phone number.
    - First 3 letters of the Prospects last name plus the last for digits of their phone number.
    - A minimum of 6 characters is required.

Add Recipients to the Envelope

The 2nd Sender is the Broker. This will route the Prospect signed application back to the Broker for review and final signature.



Steps

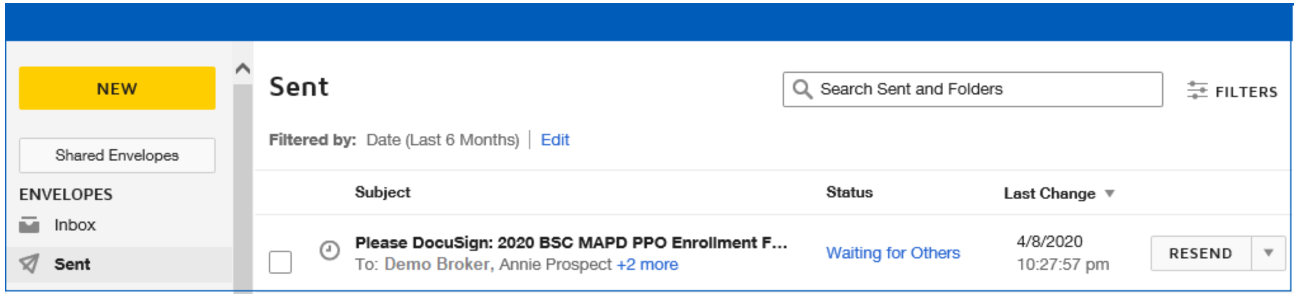
NOTE:

The “cc” has been auto-populated to copy the BCS enrollment team. This cannot be removed or modified.

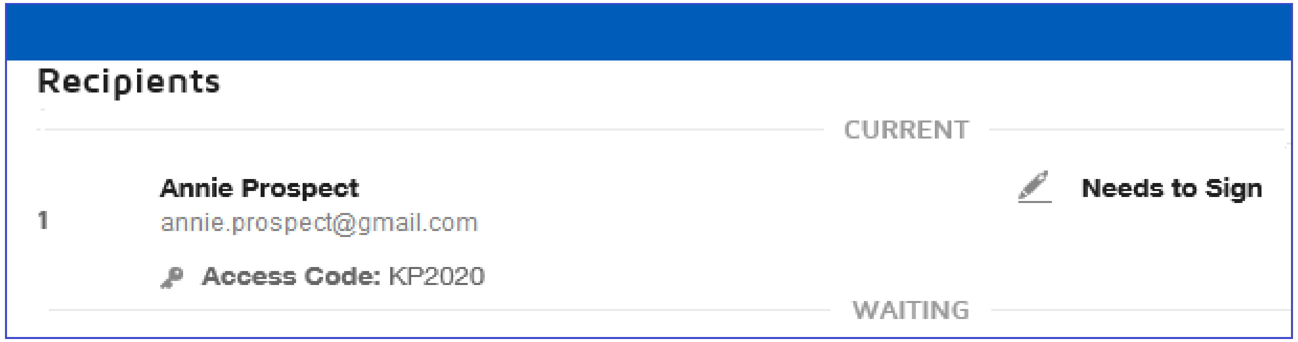
Forgotten Access Code

An Access Code is required by the system. The Prospect cannot access the document without this code.

A



B



Steps

If the prospect forgets the code you will need to do the following:

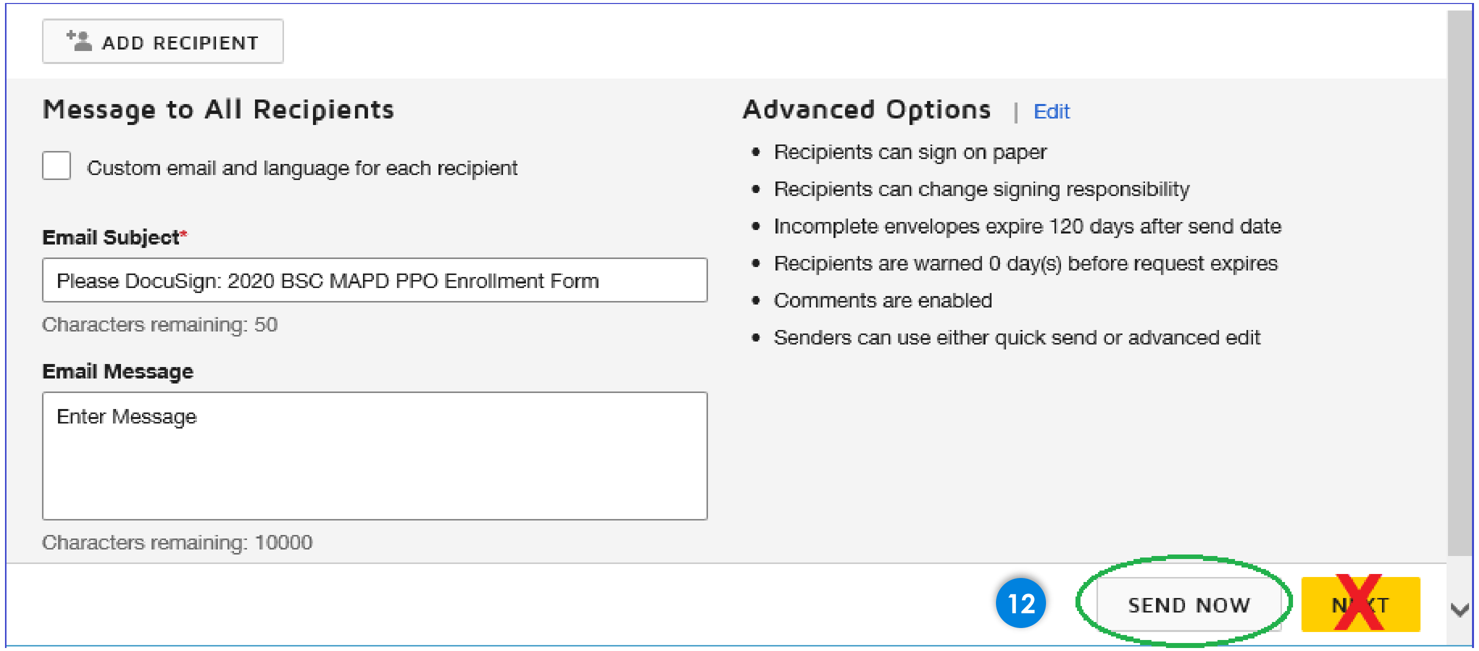
A. In the “Sent” folder, locate the item for the specific Prospect and click anywhere on the bolded title.

B. In the “Sent” folder, locate the item for the specific Prospect. The Access Code will be displayed.

Prepping the Application

The last section on the Adding Recipients is the Message to All Recipients section.

A standard message is included in the email, however the Broker can customize the message included in the email to the Prospect.



Steps

12. The Broker will click the <Send Now> button.

    (**Do Not** use the “Next” button if it appears.)

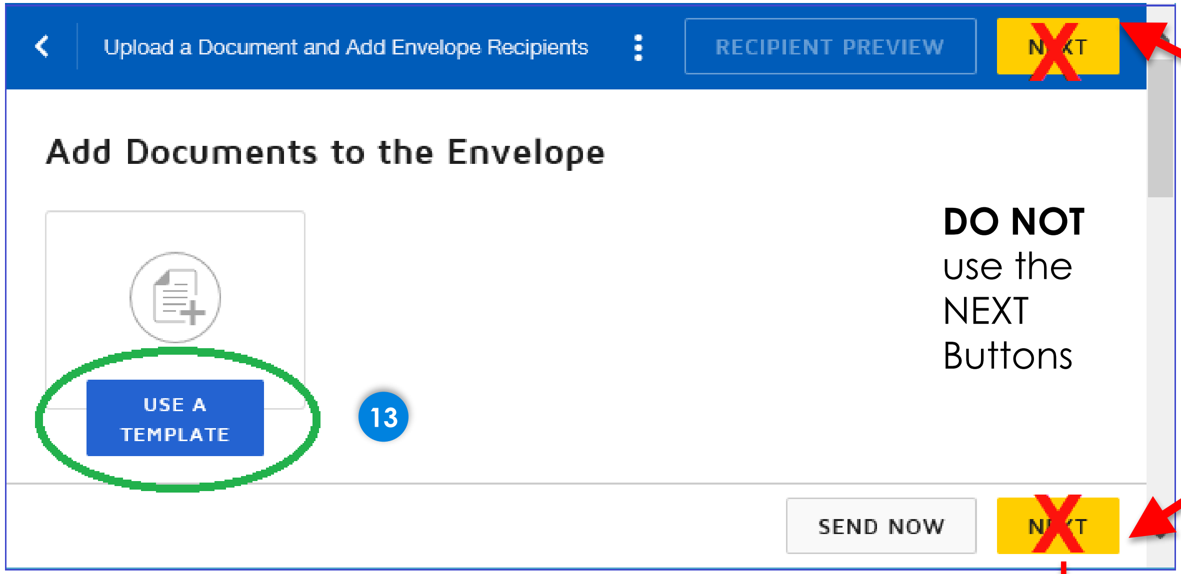
    This sends the template to the **BROKER** to fill-in the application with the Prospect on the phone.

Add Documents to the Envelope

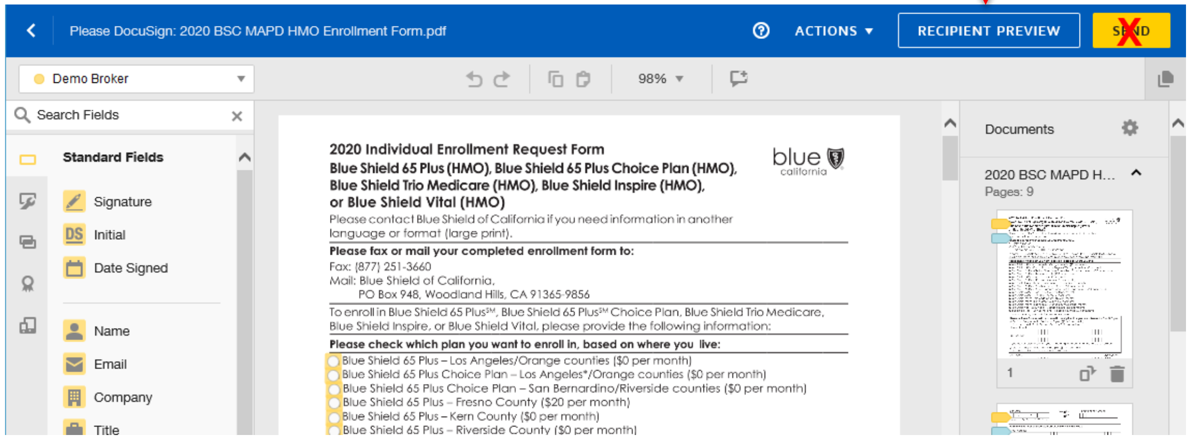
The option to "USE A TEMPLATE" will display on the left side of the screen.

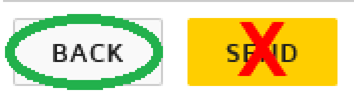
Should you click on the "Next" button in error, you will open with movable components. This is **NOT** correct.

- Do **Not Send** the document which displays.
- Click on the <Back> button *** See the next slide for an example. ***



¡Warning!





Steps

13. Click the "USE A TEMPLATE" button to select the Application associated with the Plan the Prospect has selected.

Should you click on the "Next" button in error, you will open with movable components. This is **NOT** correct.

- Do **Not Send** the document which displays.
- Click on the <Back> button *** See the next slide for an example. ***

Adding Recipient(s)

The following screen will display for the Broker.

14

Note:
At this point you are initiating a transaction. Each transaction results in a new packet or "envelope". This should only be initiated once you are sure of the plan the prospect wants to purchase.

Steps

14. Click the <Sign Now> button.

    The template is sent to the **BROKER** to fill-in the application with the Prospect on the phone.

Pre-Filling the Application

The “fillable” template will display in the background.

Steps

15. Click <CONTINUE> and proceed to fill-in the application with the prospect on the phone.

Pre-Filling the Application

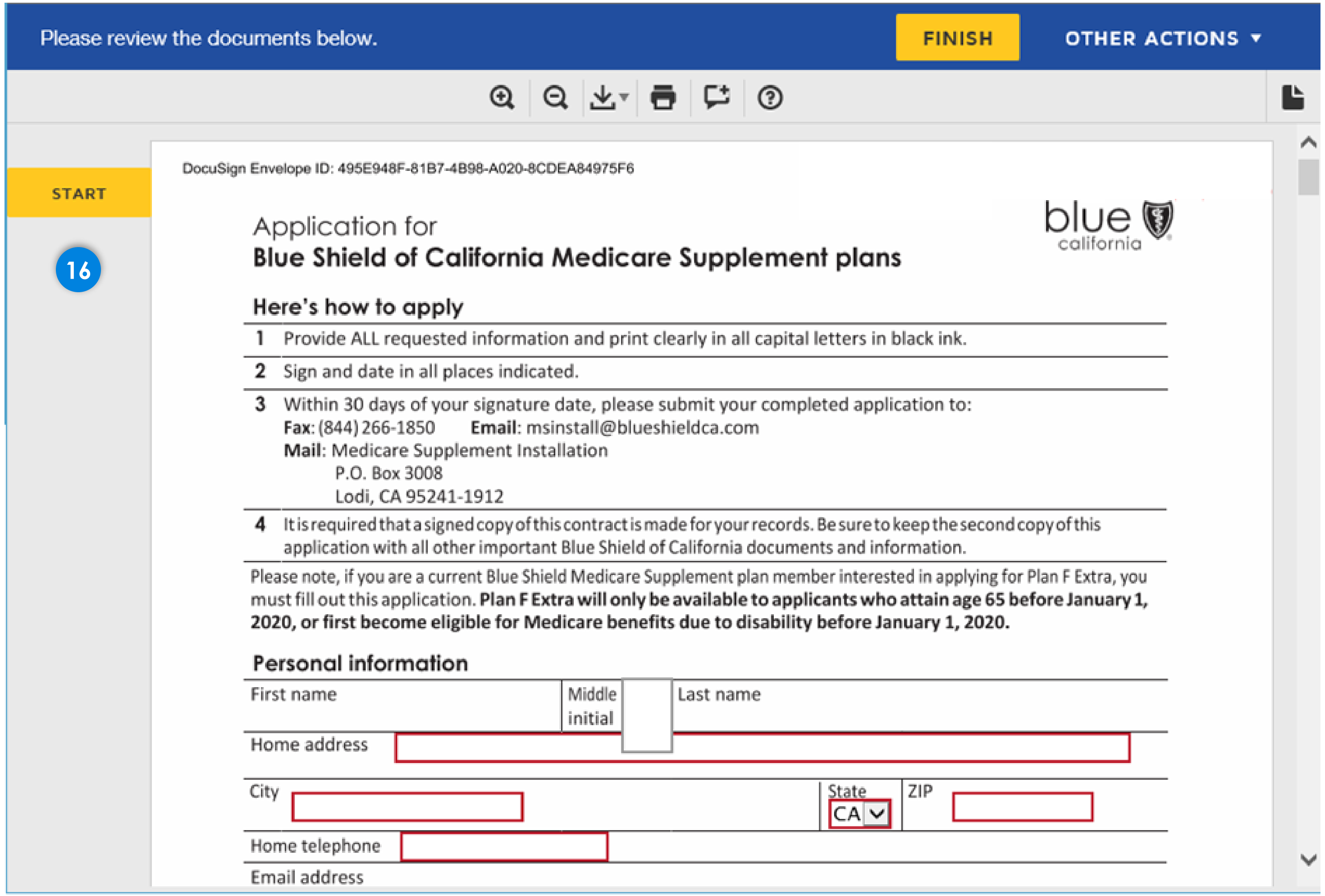
The selected application template will display.

For this example Medicare Supplement has been used.

From the first field, you then have the option to use:

- "FILL IN" - "Choose" - "Next" Tag (Not recommended – can be tedious and slow)
- Tab Key
- Mouse (Recommended)
- Scroll (Recommended)

Use of the **scroll bar** or **mouse** are recommended for ease in movement through the template.



Steps

16. By clicking on the <**START**> flag on the left of the screen you will be taken to the first required field.

The red boxes indicate where the prospects data needs to be entered.

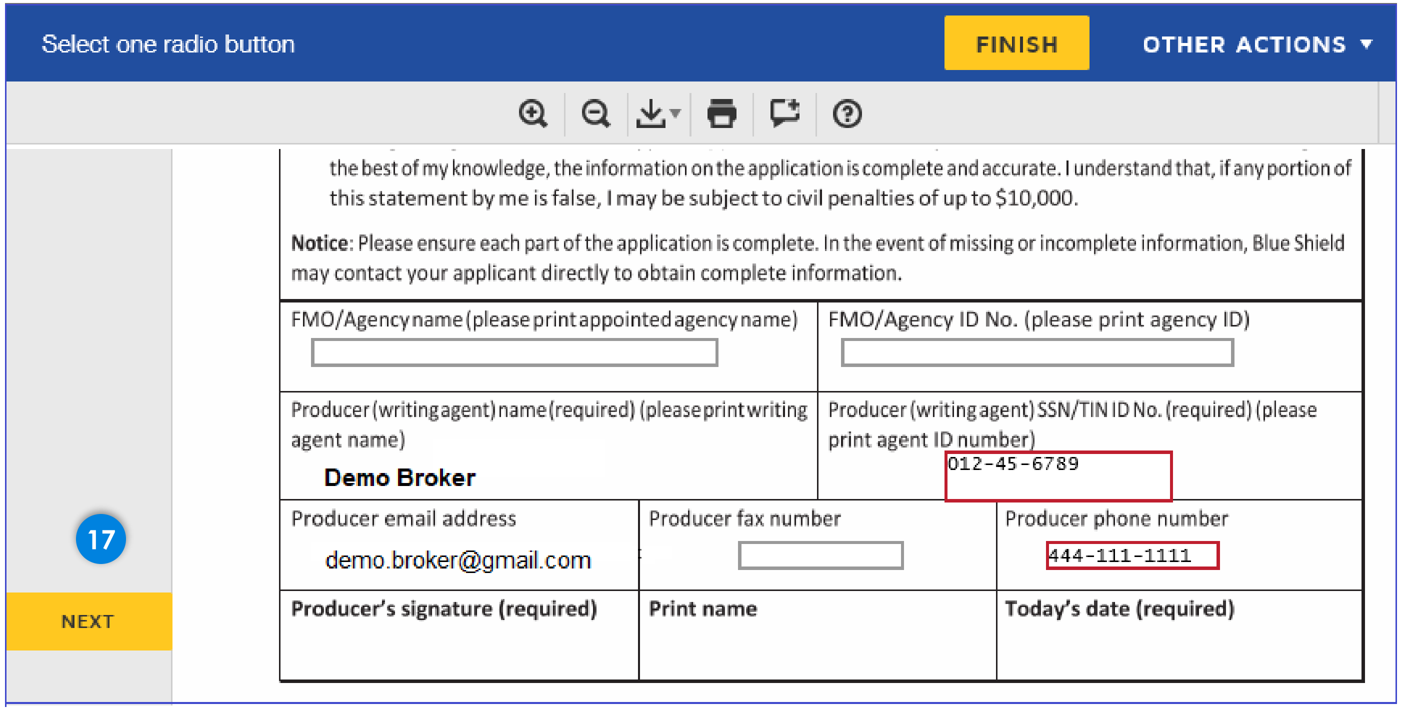
Note some fields require specific formatting.

The prospect's Name and Email will populate once the form is completed and sent.

Pre-Filling the Application

The Broker information is filled in prior to sending the application to the Prospect.

However, the Broker will not sign until after the Prospect reviews and signs the application.



Steps

17. Once all required information has been filled in, click the <FINISH> button.

Note:
The Producer's Name, SSN/TIN ID and phone number are required.

Important

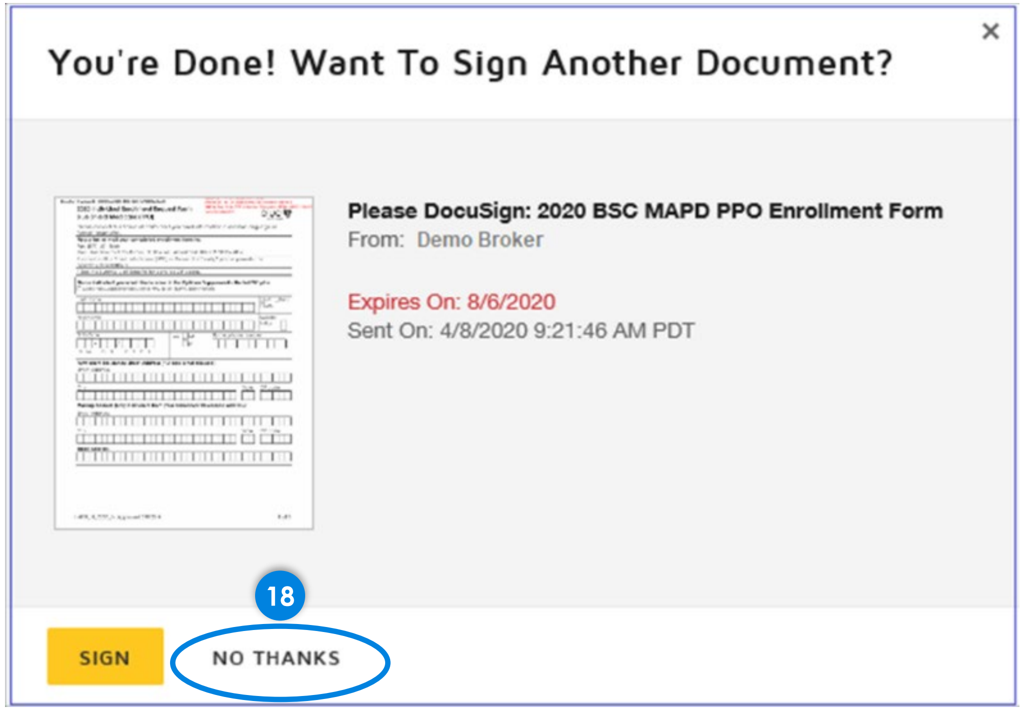
Grey boxes are all fillable but optional.

FMO information is required if the Broker is endorsed or currently writing business under an FMO. This is **critical** in the FMO and Broker being paid correctly.

Broker information is critical to complete even though it shown as optional.

Pre-Filling the Application

Once finished, the “You’re Done” screen will display.

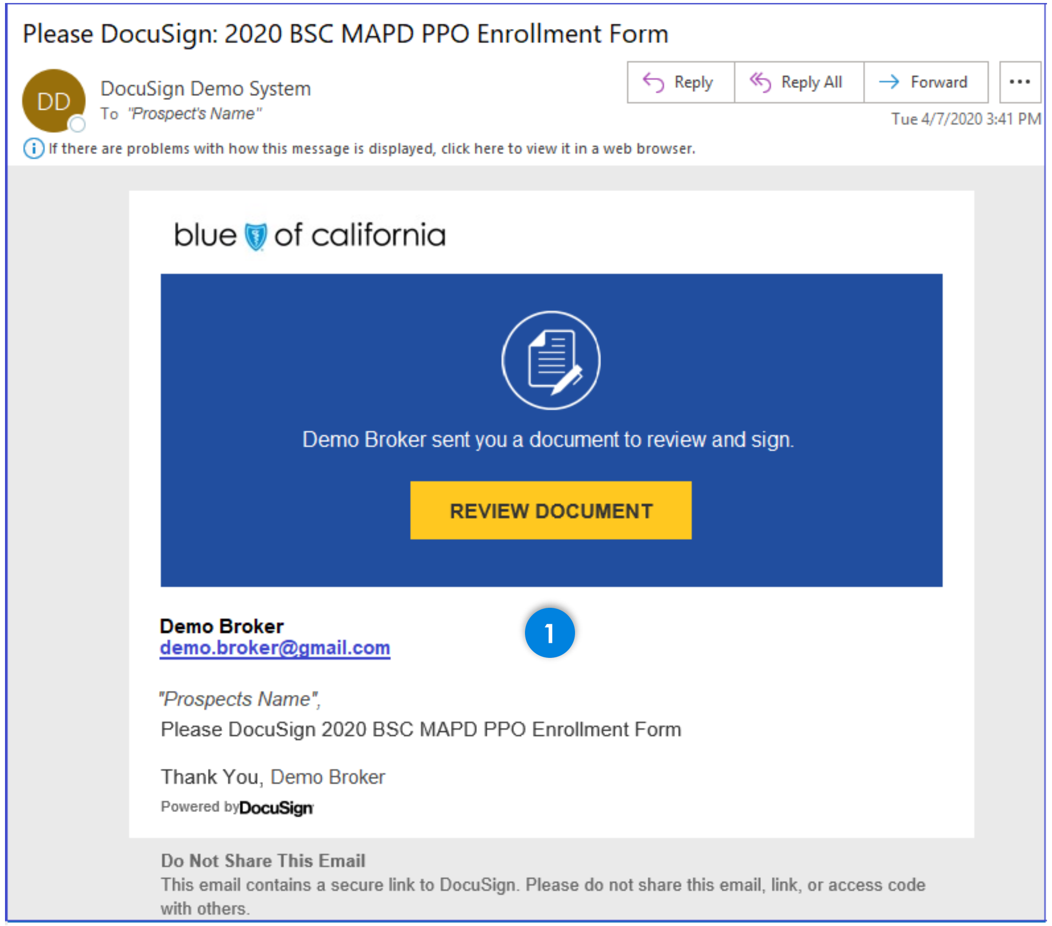


Steps

18. Click the <NO THANKS> button to finish.

Prospects Views and Actions

The Prospect should receive an email similar to the one shown.

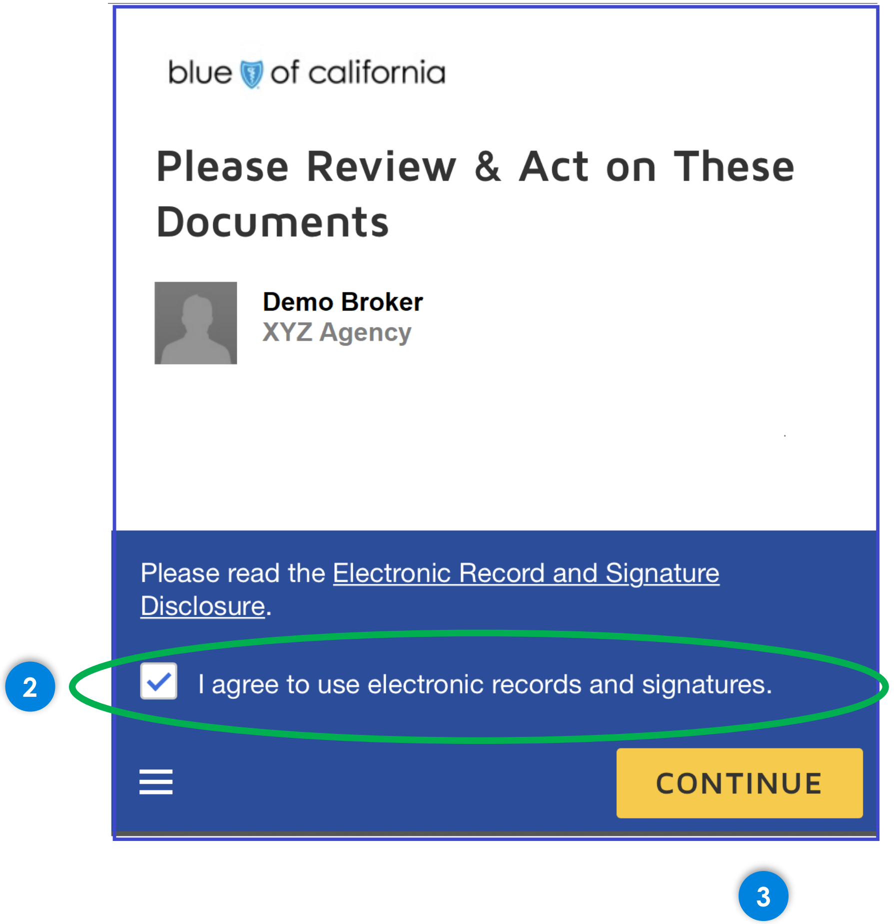


Steps

1. Have the Prospect click the <REVIEW DOCUMENT> button.

Prospects Views and Actions

Once the prospect click on the “Review Document” button from the email, the document will start to load.



Steps

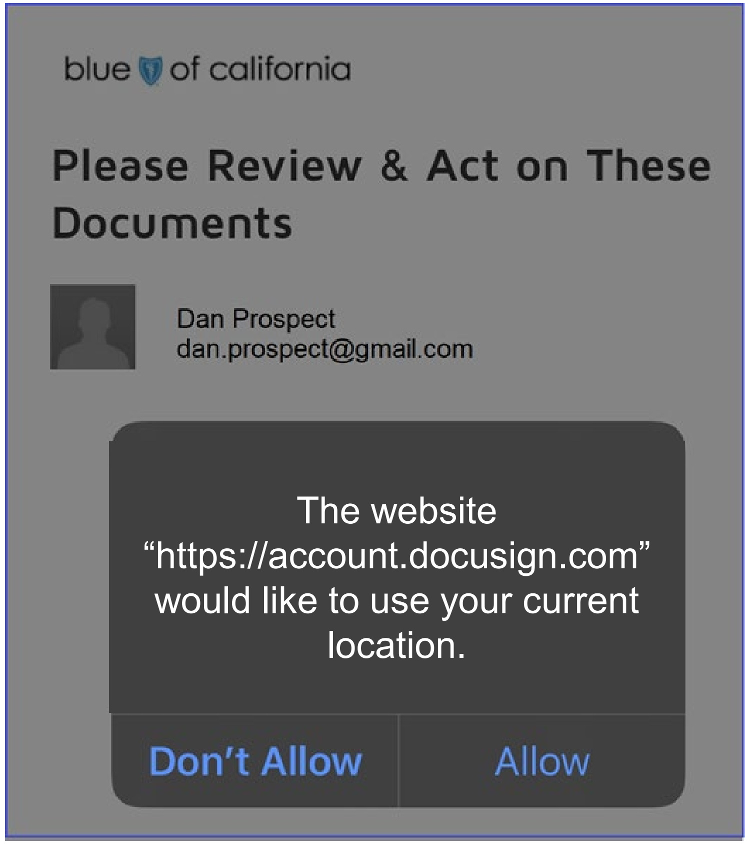
2. The Prospect will be asked to check the agreement:

   “I agree to use electronic records and signatures.”

3. Once this is selected, they will need to click <Continue>

Prospects Views and Actions

The Prospect will be asked to "Allow" the use of their current location.



4

Steps

4. The Prospect needs to click <Allow>.

   This enables the audit trail required with an electronic signature.

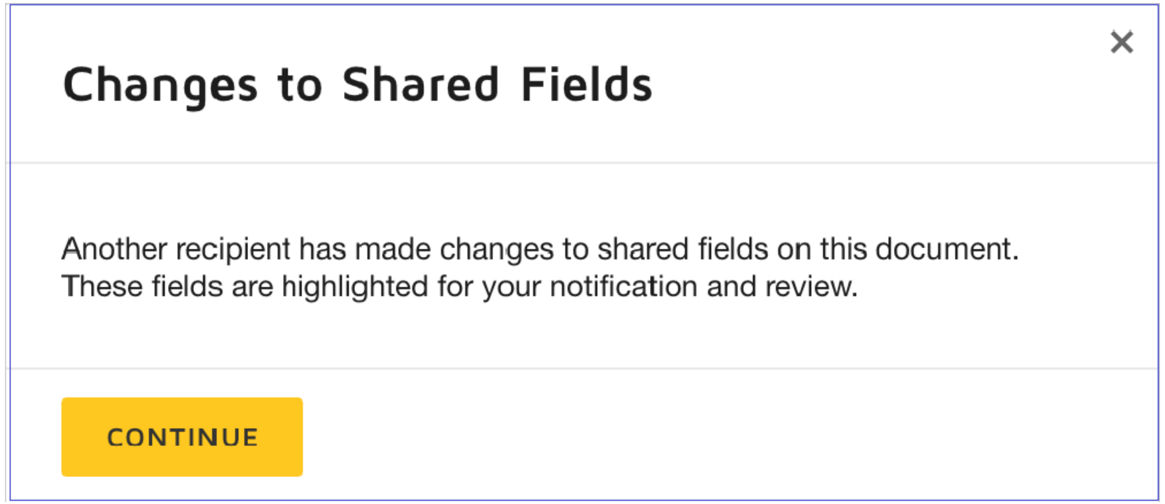
Prospects Views and Actions

The "Changes to Shared Fields screen will display.

The "Changes to Shared Fields" notice will display every time an envelope is sent to a Prospect.

This is due to the Broker having filled in the application.

5



Steps

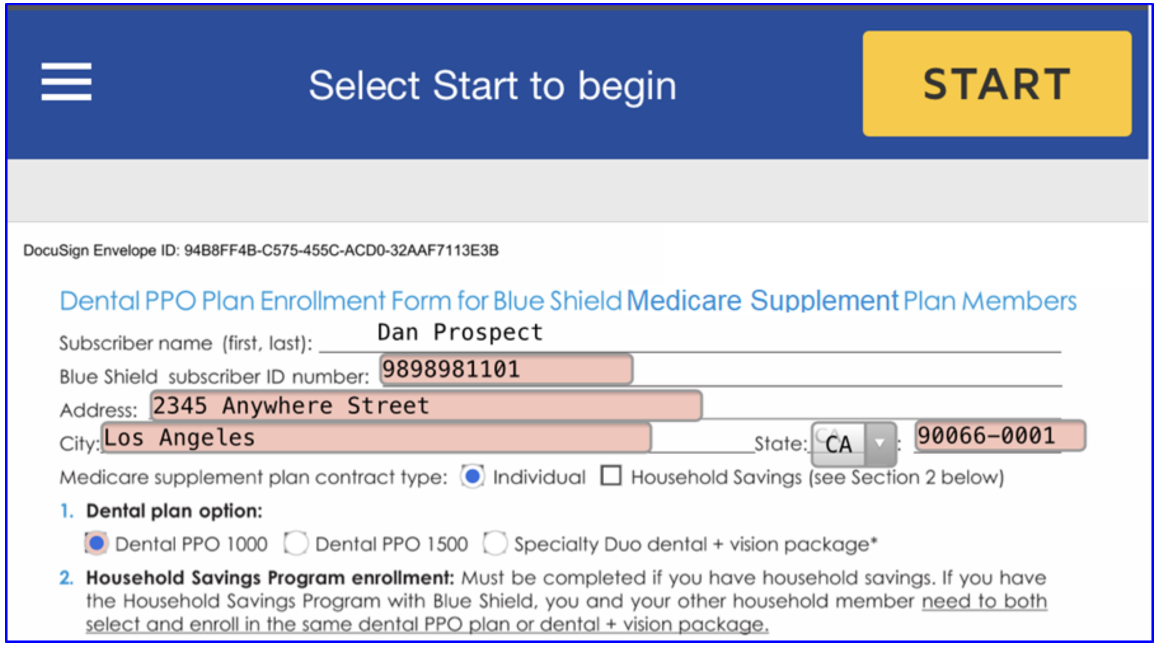
5. The Prospect clicks <CONTINUE>.

Prospects Views and Actions

The Prospect is now ready to validate the information on the application is correct.

The Prospect can make changes if needed.

If not, by clicking on the <START> button they will be move to the Signature process.



6

Steps

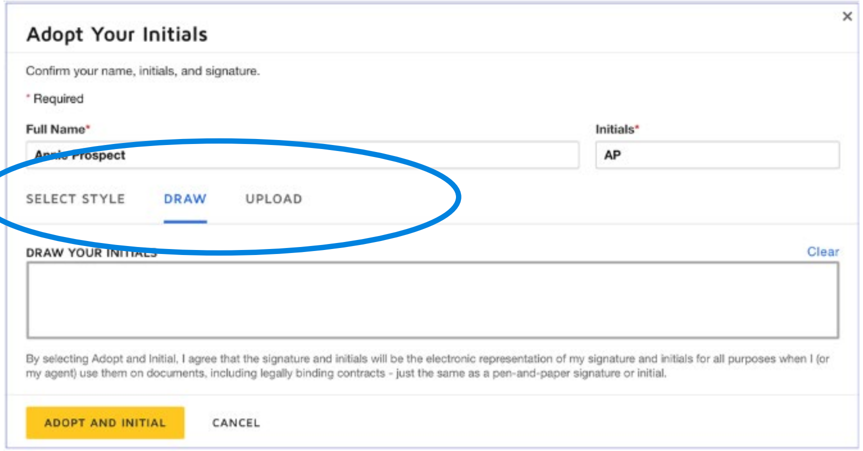
6. Select Start to begin.

   Note the first and last name of the Prospect has automatically filled into the application.

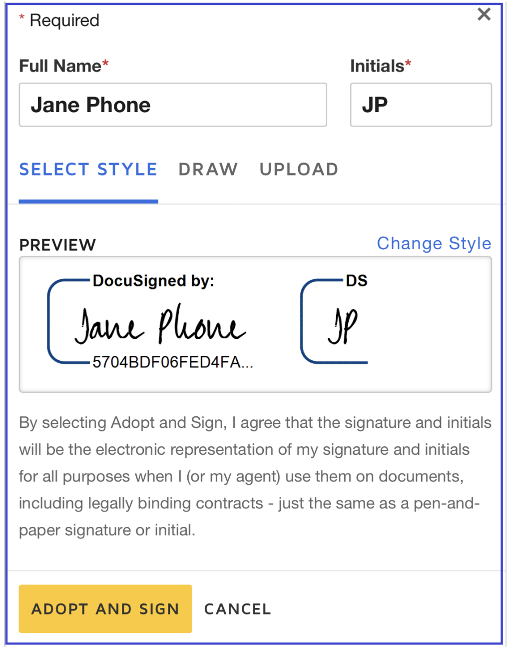
Prospects Views and Actions

When the Prospect starts to sign and/or initial an application they will be taken to the “Adopt Your Initials or Adopt Your Signature” screen.

7



8a



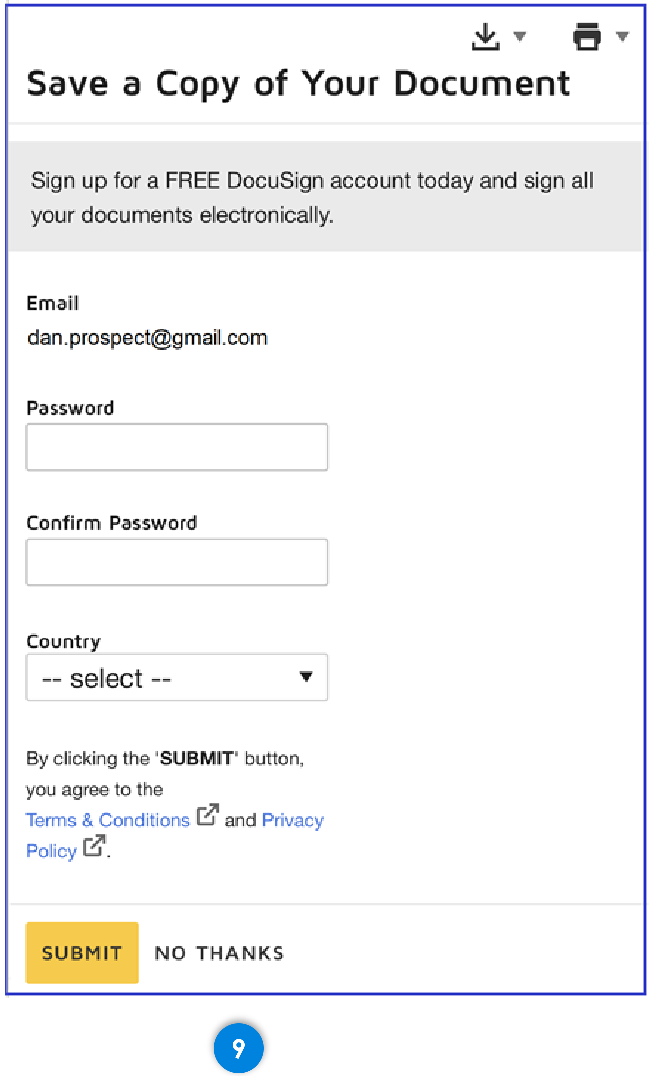
8b

Steps

7. The default is for the Applicant to “DRAW” their signature. If they have the device capable of this they can choose this option.
8. If they would prefer, the Prospect can use a system generated signature by:
   - A. Clicking on the “SELECT STYLE” option.
   - B. Using the <ADOPT AND SIGN> is the easiest way to sign.

Prospects Views and Actions

The Prospect will be given an opportunity to save the file.



Steps

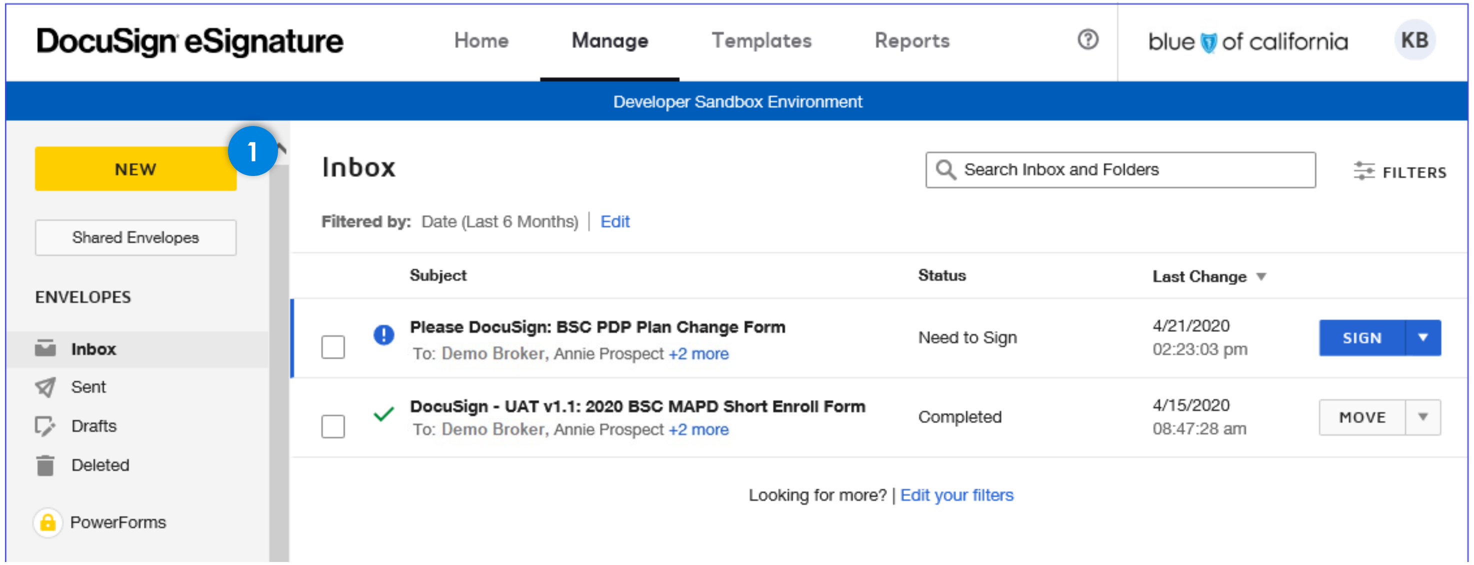
9. The Prospect should click on <NO THANKS>.

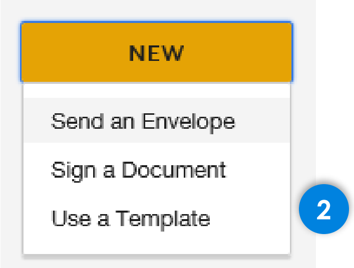
   The Prospect will receive a copy of the application once it completed and signed by the Broker.

Start an Application

There are several methods for starting an application.

This is method 2.





Method 2

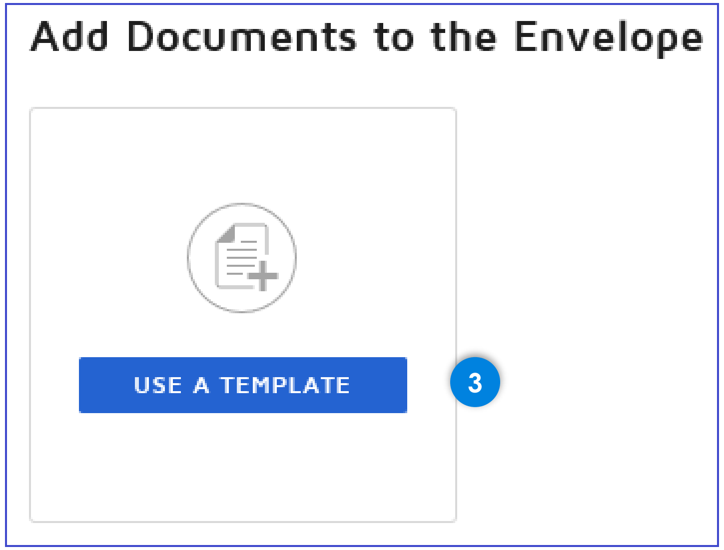
1. From the Manage tab where your Inbox is located, click on the <NEW> button located at the top of the Left Navigation bar.

   A dropdown will appear with several options.

2. From the drop-down list you will select <Use a Template>.

Add Documents to the Envelope

The "Add Documents to the Envelope" – "USE A TEMPLATE" will display.



Method 2

3. Click on the <USE A TEMPLATE> button.

Note:

If you select <Use a Template> in the prior step, you are only able to select one application template and not multiple.