



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.

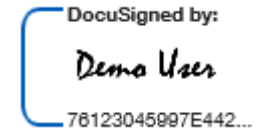
Buttons:

- 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
<input style="width: 90%;" type="text"/>	<input style="width: 90%;" type="text"/>	<input style="width: 90%;" type="text"/>
Tax ID or Social Security Number		NPN
<input style="width: 95%;" type="text"/>		<input style="width: 60%;" type="text"/>

Mailing Address

Street

City	State	Zip Code
<input style="width: 90%;" type="text"/>	<input style="width: 30%;" type="text"/>	<input style="width: 90%;" type="text"/>

Phone Number	Email Address
<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>

Optional

FMO Name	FMO Tax ID#
<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>

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



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.

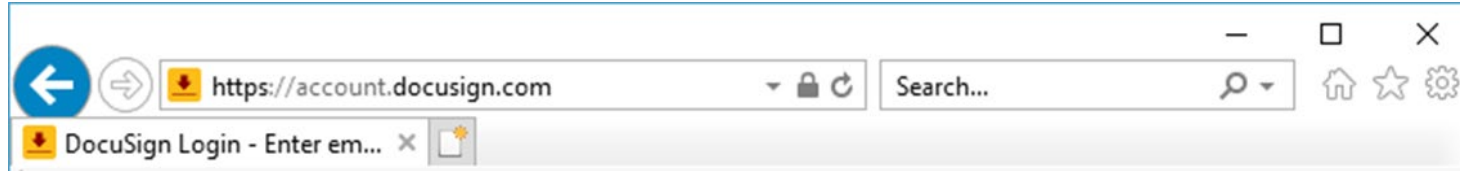
Email the completed form to:
MedicareBroker@Blueshieldca.com

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

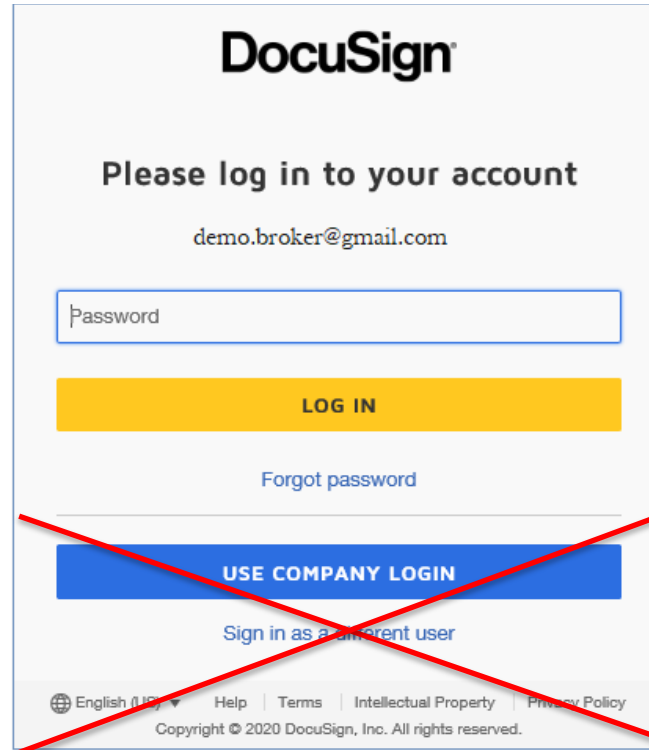
Using email, DocuSign can be used on the following devices:

- 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>](#)

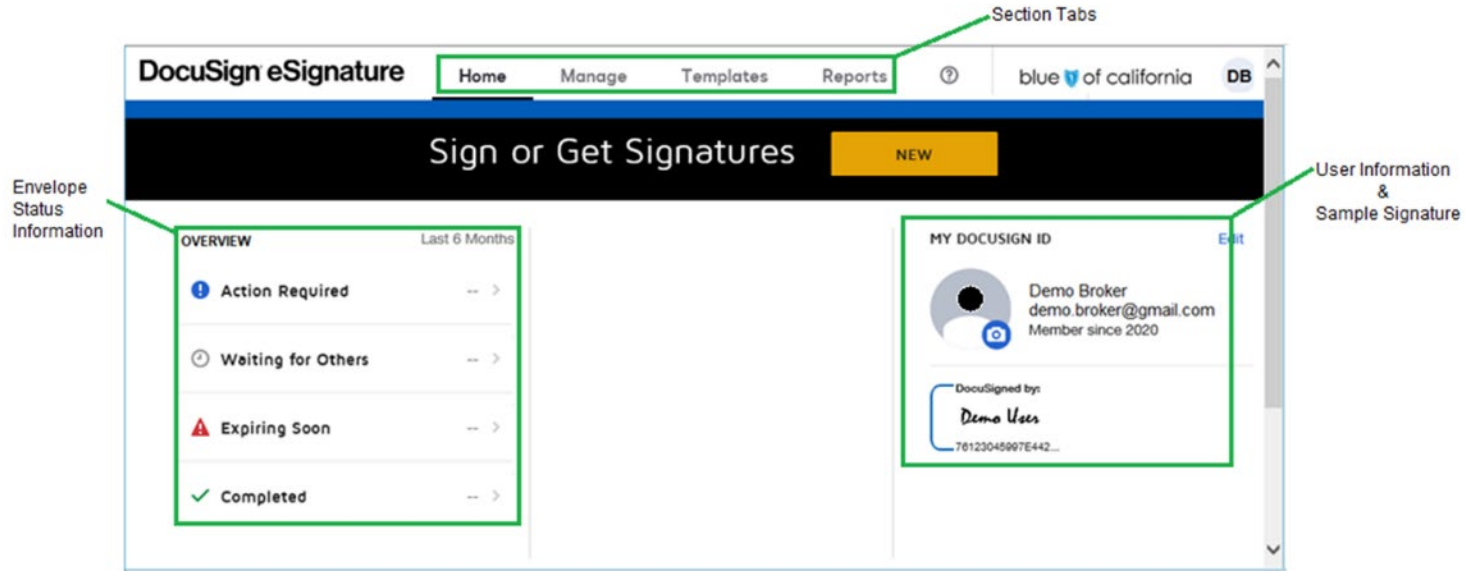
Note: You will only create your password the 1st time you login.

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

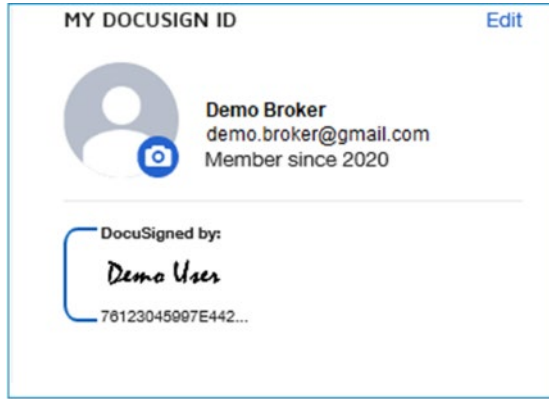
Some items such as the "My DOCUSIGN ID" won't need to be accessed once the initial entries such as Profile and Signature(s) have been setup.

Updating Your Profile

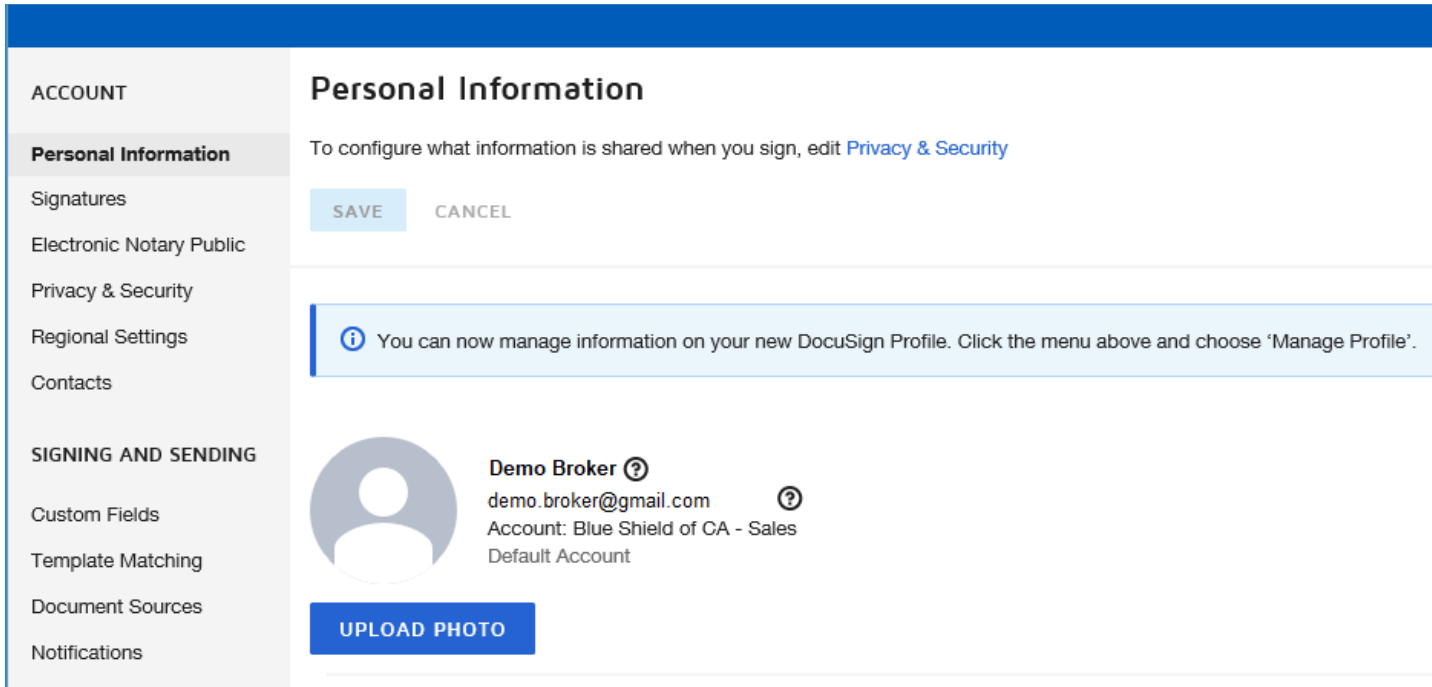
The first thing the Broker will need to do is complete your user Profile and DocuSign Signature.

This information is 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.

Company and Job Title

Company

Job Title

Address and Phone

Address

City

Region/Province

Postal Code

Country

Phone (optional)

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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

- Next click on the [+Add New](#) to create your personal signature.

Creating the Brokers Signature

The manage signatures pane will open to the right.

Create Your Signature

7 Full Name Initials

CHOOSE DRAW UPLOAD

8

<input type="radio"/>	DocuSigned by: <i>Demo Broker</i> 76123045997E442...	DS DB
<input type="radio"/>	DocuSigned by: <i>Demo Broker</i> 76123045997E442...	DS DB
<input type="radio"/>	DocuSigned by: <i>Demo Broker</i> 76123045997E442...	DS DB
<input type="radio"/>	DocuSigned by: <i>Demo Broker</i> 76123045997E442...	DS DB
<input type="radio"/>	DocuSigned by: <i>Demo Broker</i> 76123045997E442...	DS DB
<input type="radio"/>	DocuSigned by: <i>Demo Broker</i> 76123045997E442...	DS DB

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By clicking Create, I agree that the signature and initials will be the electronic representation of use them on envelopes, including legally binding contracts - just the same as a pen-and-paper

CREATE CANCEL

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

The screenshot shows the DocuSign eSignature interface. At the top, there are navigation tabs: Home, Manage (highlighted), Templates, and Reports. The user is logged in as 'blue of california' with a 'KB' profile. Below the navigation is a 'Developer Sandbox Environment' banner. On the left is a sidebar with sections: NEW (yellow button), Shared Envelopes, ENVELOPES (Inbox, Sent, Drafts, Deleted, PowerForms), QUICK VIEWS (Action Required, Waiting for Others, Expiring Soon, Completed, Authentication Failed), and FOLDERS (April, Completed Apps, Waiting for Others). The main area is titled 'Inbox' and contains a search bar and a table of emails. The table has columns for Subject, Status, and Last Change. Two emails are listed: one with a status of 'Need to Sign' and another with a status of 'Completed'. A 'SIGN' button is visible next to the first email, and a 'MOVE' button is next to the second. At the bottom of the table, there is a link: 'Looking for more? | Edit your filters'.

Steps

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

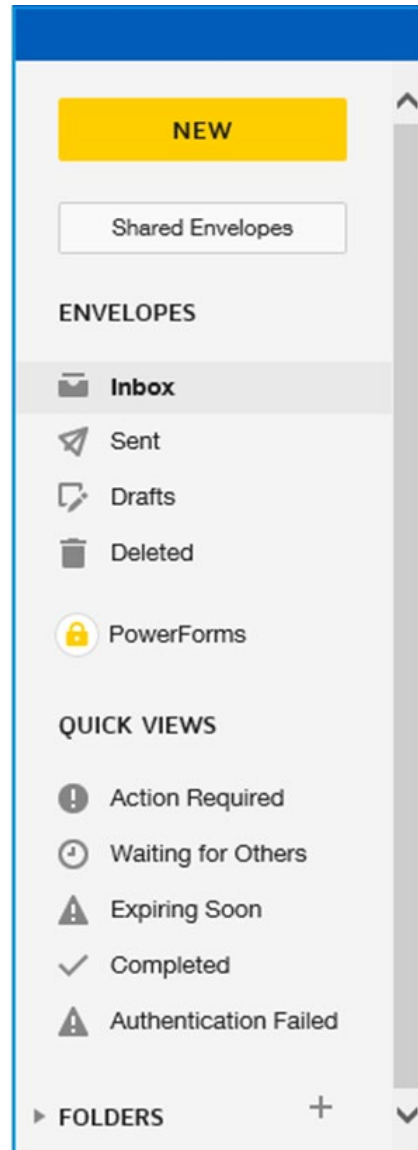
Manage Screen

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.

Sent				Search Sent and Folders	FILTERS
Filtered by: Date (Last 6 Months) Edit					
	Subject	Status	Last Change		
<input type="checkbox"/>	 Please DocuSign: 2020 BSC MAPD PPO Enrollment Form To: Demo Broker, John Recipient +2 more	Need to Sign	4/8/2020 09:21:46 am	SIGN	<ul style="list-style-type: none"> Resend Move Correct Create a Copy Void History Form Data Export as CSV Delete
<input type="checkbox"/>	 Please DocuSign: 2020 BSC MAPD PPO Enrollment Form To: Demo Broker, Annie Recipient +2 more	Completed	4/7/2020 04:02:44 pm		
<input type="checkbox"/>	 Please DocuSign: MS Dental Specialty application- english with second prospect.... To: Demo Broker, Test Recipient +2 more	Completed	4/7/2020 03:07:25 pm		
<input type="checkbox"/>	 Please DocuSign: 2020 BSC MAPD Dental Enrollment Form To: Demo Broker, Sam Prospect +1 more	Declined	4/7/2020 09:49:39 am		
<input type="checkbox"/>	 Please DocuSign: 2020 BSC MedSupp Dental Enrollment Form To: Demo Broker, Test Prospect +1 more	Completed	4/7/2020 09:04:21 am	MOVE	<ul style="list-style-type: none"> Forward Create a Copy History Form Data Export as CSV Delete

Looking for more? | [Edit your filters](#)

Status Indicators

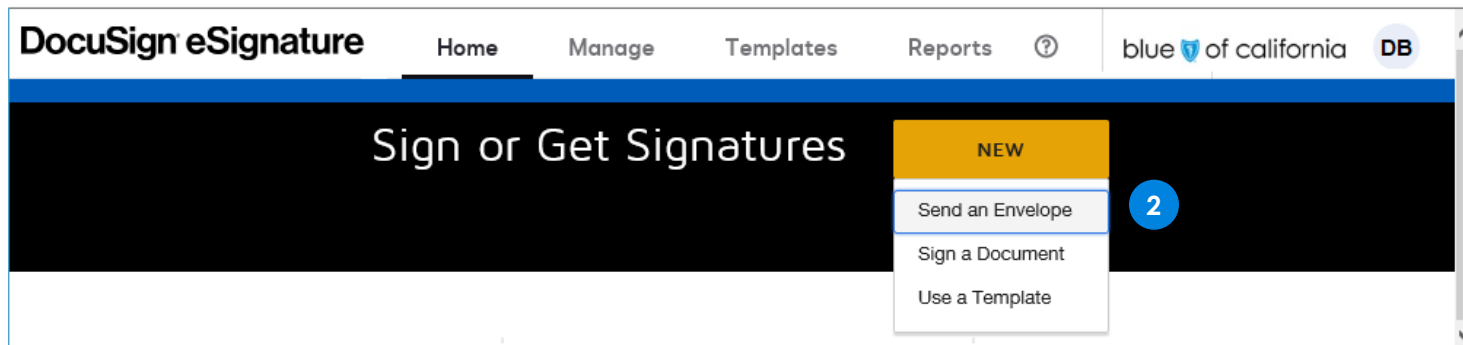
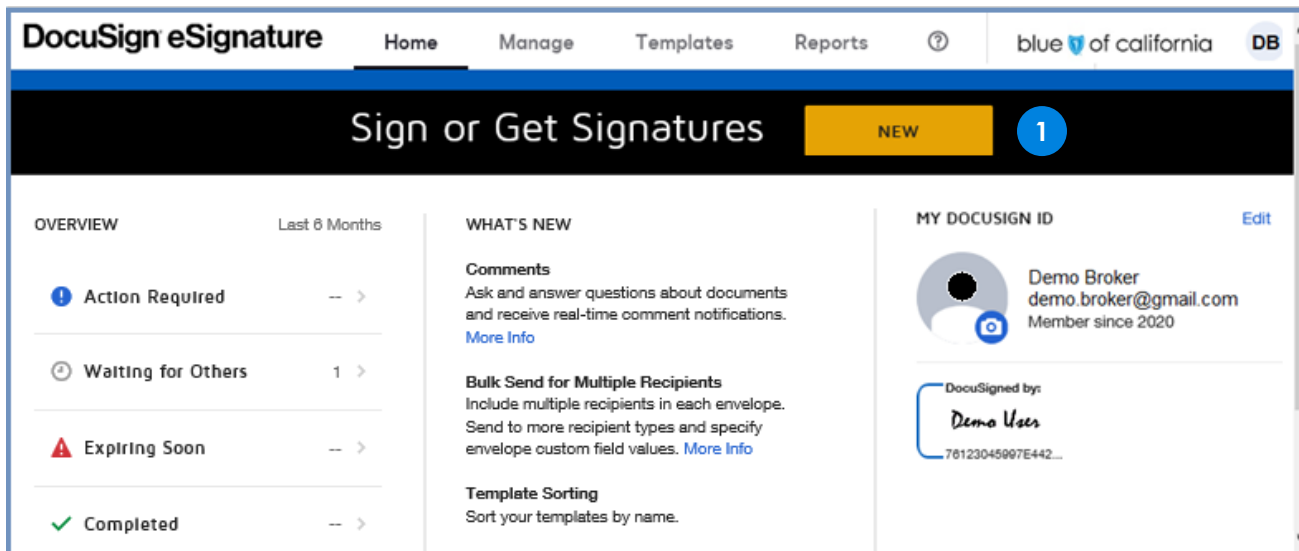
-  Need to Sign
-  Declined
-  Complete

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

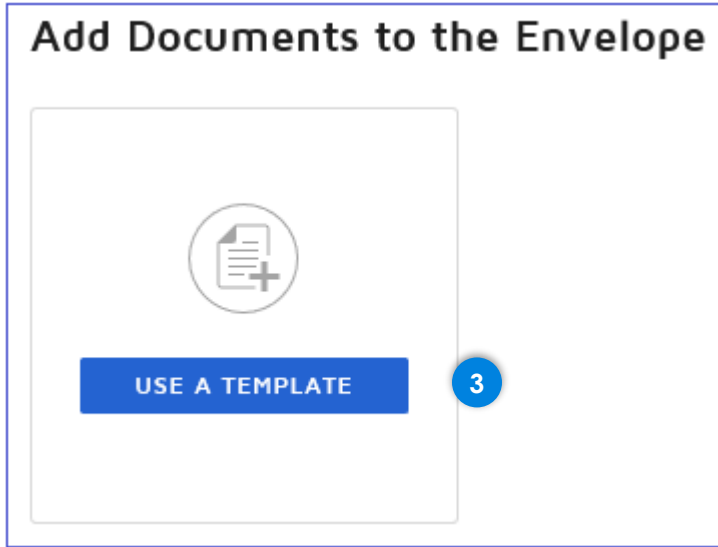
1. On the "Home" Page you will click on the <New> button.

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.

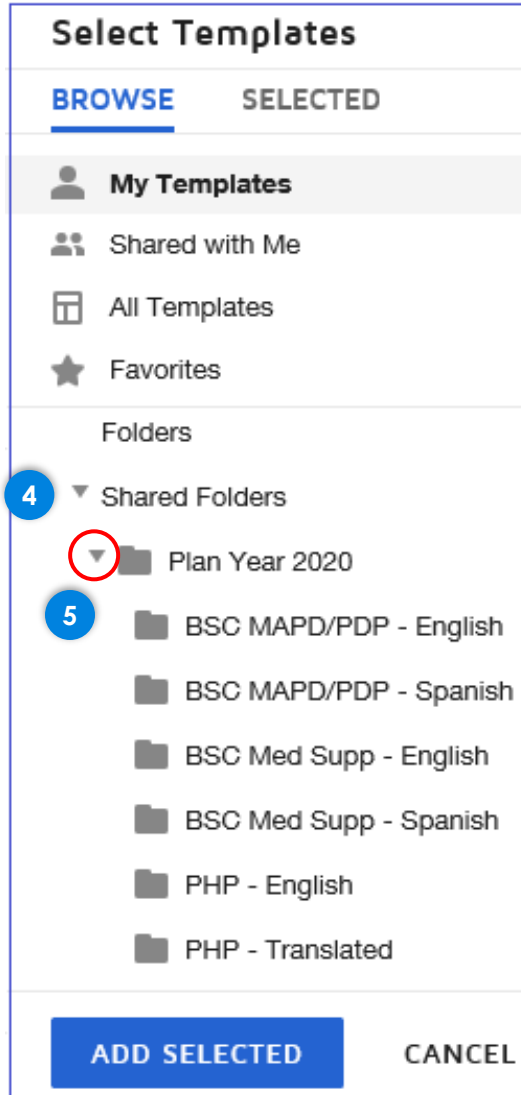
Note:

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 ▼
<input type="checkbox"/> 2020 BSC PDP Enrollment Form v 1.0	BSC Admin	4/9/2020 03:09:08 pm
<input type="checkbox"/> 2020 BSC MAPD Dental Enrollment Form v 1.0	BSC Admin	4/9/2020 03:09:05 pm
<input type="checkbox"/> 2020 BSC MAPD HMO Enrollment Form v1.0	BSC Admin	4/9/2020 03:09:05 pm
<input type="checkbox"/> 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 ▼
<input type="checkbox"/> 2020 BSC Medicare Supplement Household Discount Enrollment Form v1.0	Myera Magsino	4/9/2020 03:09:07 pm
<input type="checkbox"/> 2020 BSC Med Supp Dental Speciaity Household Discount Enrollment Form v1.0	Myera Magsino	4/9/2020 03:09:03 pm
<input checked="" type="checkbox"/> 2020 BSC Medicare Supplement Enrollment Form v1.0	Myera Magsino	4/9/2020 03:09:02 pm
<input checked="" type="checkbox"/> 2020 BSC MedSupp Dental Enrollment Form v1.0	Myera Magsino	4/9/2020 03:09:00 pm

ADD SELECTED CANCEL

6

7

Steps

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

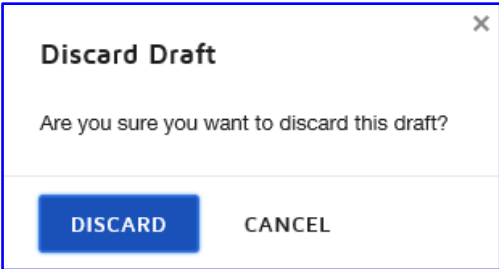
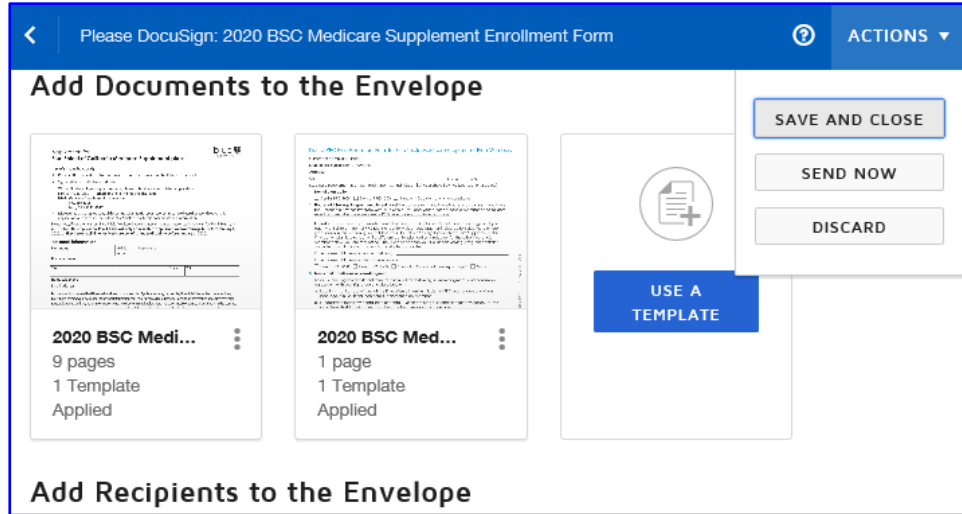
Add Documents to the Envelope

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".



Steps

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

- To delete the template(s) prior to send, click on the <ACTIONS> button in the top bar and then click the <DISCARD> button.
- 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

Add Recipients to the Envelope

Some of the recipients are locked and cannot be changed [Learn More...](#)
As the sender, you automatically receive a copy of the completed envelope.

ADD FROM CONTACTS SIGNING ORDER

Set signing order

1

Sender NEEDS TO SIGN ▾ MORE ▾

Name *

Demo Broker

Email *

demo.broker@gmail.com

✕

2

Prospect NEEDS TO SIGN ▾ MORE ▾

Name *

John Prospect

Email *

prospect@email.com

✕

Select access authentication Close

Access Code ▾

JP042020

← REQUIRED

Your template requires this recipient to have an access code.

Codes are not case-sensitive.

You must provide this code to the signer.

This code is available for you to review on the Envelope Details page.

+ ADD AUTHENTICATION

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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.

3

NEEDS TO SIGN ▼ MORE ▼

Sender

Name *

⋮

Email *

demo.broker@gmail.com

4

NEEDS TO SIGN ▼ MORE ▼

cc

Name *

Woodland Hills Membership

Email *

WHMembership@blueshieldca.com

+ ADD RECIPIENT

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

Sent

Filtered by: Date (Last 6 Months) | [Edit](#)

Subject	Status	Last Change
<input type="checkbox"/> Please DocuSign: 2020 BSG MAPD PPO Enrollment F... To: Demo Broker, Annie Prospect +2 more	Waiting for Others	4/8/2020 10:27:57 pm

RESEND

B

Recipients

CURRENT

1	Annie Prospect annie.prospect@gmail.com	Needs to Sign
---	---	---------------

Access Code: KP2020

WAITING

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.

+ ADD RECIPIENT

Message to All Recipients

Custom email and language for each recipient

Email Subject*

Please DocuSign: 2020 BSC MAPD PPO Enrollment Form

Characters remaining: 50

Email Message

Enter Message

Characters remaining: 10000

Advanced Options | [Edit](#)

- Recipients can sign on paper
- Recipients can change signing responsibility
- Incomplete envelopes expire 120 days after send date
- Recipients are warned 0 day(s) before request expires
- Comments are enabled
- Senders can use either quick send or advanced edit

12
SEND NOW
~~NEXT~~
▼

Steps

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

(Do Not use the "Next" button if it appears.)

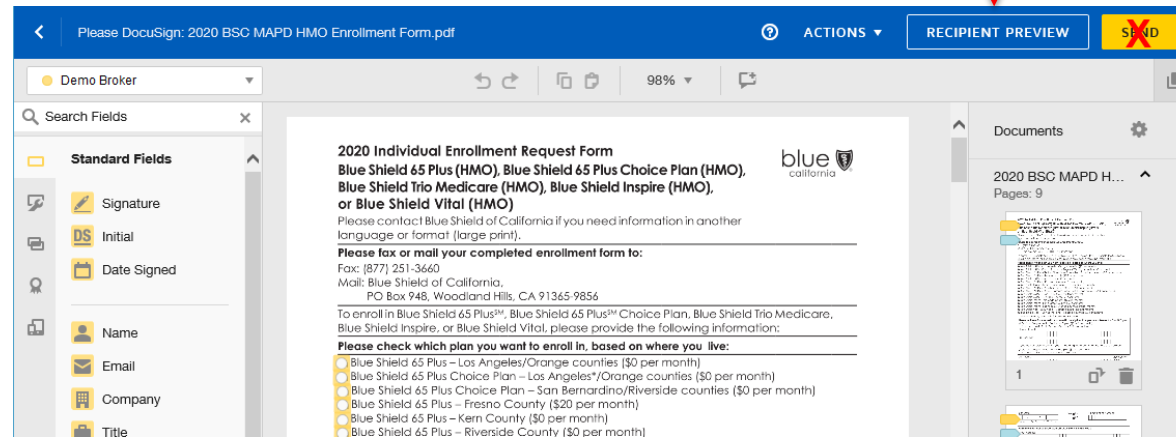
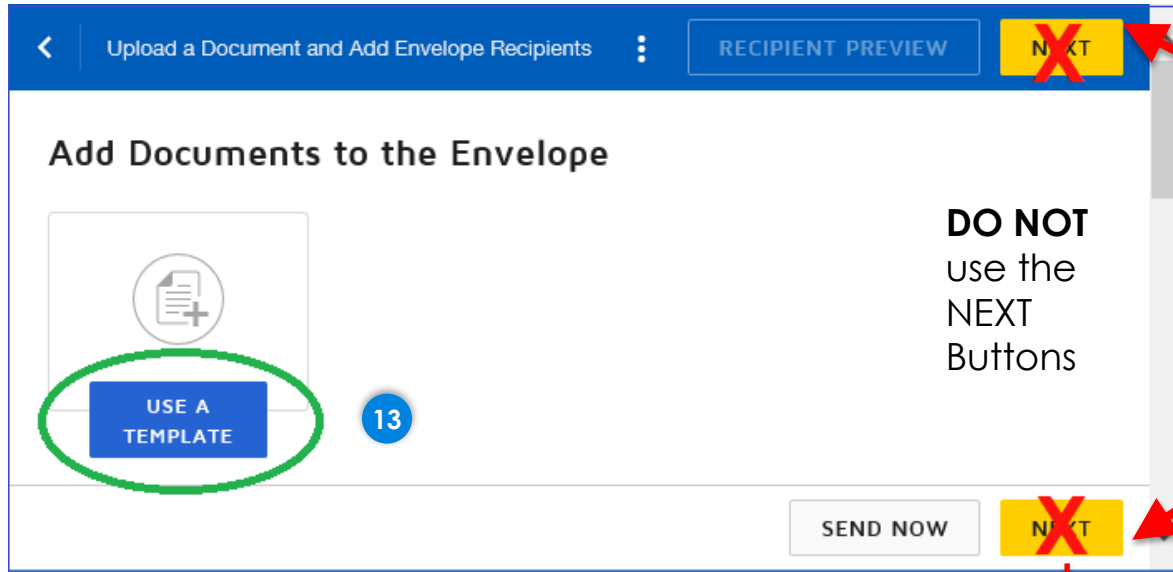
This sends the template to the **BROKER** to fill-in the application with the Prospect on the phone.

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. ***



Steps

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

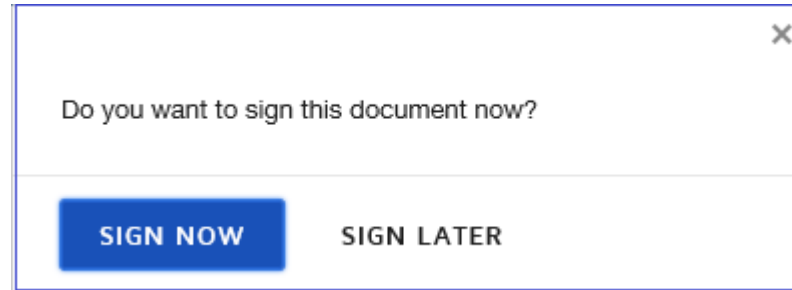
Should you click on the "Next" button in error, you will open with movable components. This is **NOT** correct.

- 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.

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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.

Please Review & Act on These Documents blue  of california


 **Demo Broker**
Brokers Company Name Here

Powered by **DocuSign**

15

Please review the documents below. **CONTINUE** **OTHER ACTIONS** ▾

3 Within 30 days of your signature date, please submit your completed application to:
Fax: (844) 266-1850 **Email:** msinstall@blueshieldca.com
Mail: Medicare Supplement Installation
 P.O. Box 3008
 Los Angeles, CA 90011-3008

Powered by **DocuSign**  Change Language - English (US) ▾ | Terms Of Use & Privacy ▾ | Copyright © 2020 DocuSign Inc. | V2R

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.

Please review the documents below. **FINISH** OTHER ACTIONS ▾

DocuSign Envelope ID: 495E948F-81B7-4B98-A020-8CDEA84975F6

START 16

Application for **Blue Shield of California Medicare Supplement plans**

Here's how to apply

- 1 Provide ALL requested information and print clearly in all capital letters in black ink.
- 2 Sign and date in all places indicated.
- 3 Within 30 days of your signature date, please submit your completed application to:
Fax: (844) 266-1850 **Email:** msinstall@blueshieldca.com
Mail: Medicare Supplement Installation
 P.O. Box 3008
 Lodi, CA 95241-1912
- 4 It is required that a signed copy of this contract is made for your records. Be sure to keep the second copy of this application with all other important Blue Shield of California documents and information.

Please note, if you are a current Blue Shield Medicare Supplement plan member interested in applying for Plan F Extra, you must fill out this application. **Plan F Extra will only be available to applicants who attain age 65 before January 1, 2020, or first become eligible for Medicare benefits due to disability before January 1, 2020.**

Personal information

First name Middle initial Last name

Home address

City State ZIP

Home telephone

Email address

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.

17

NEXT

Select one radio button
FINISH
OTHER ACTIONS ▾

🔍 🔍 📄 📄 📄 📄 ?

the best of my knowledge, the information on the application is complete and accurate. I understand that, if any portion of this statement by me is false, I may be subject to civil penalties of up to \$10,000. Notice: Please ensure each part of the application is complete. In the event of missing or incomplete information, Blue Shield may contact your applicant directly to obtain complete information.		
FMO/Agency name (please print appointed agency name) <input style="width: 90%;" type="text"/>	FMO/Agency ID No. (please print agency ID) <input style="width: 90%;" type="text"/>	
Producer (writing agent) name (required) (please print writing agent name) Demo Broker	Producer (writing agent) SSN/TIN ID No. (required) (please print agent ID number) 012-45-6789	
Producer email address demo.broker@gmail.com	Producer fax number <input style="width: 80%;" type="text"/>	Producer phone number 444-111-1111
Producer's signature (required)	Print name	Today's date (required)

Steps

- 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

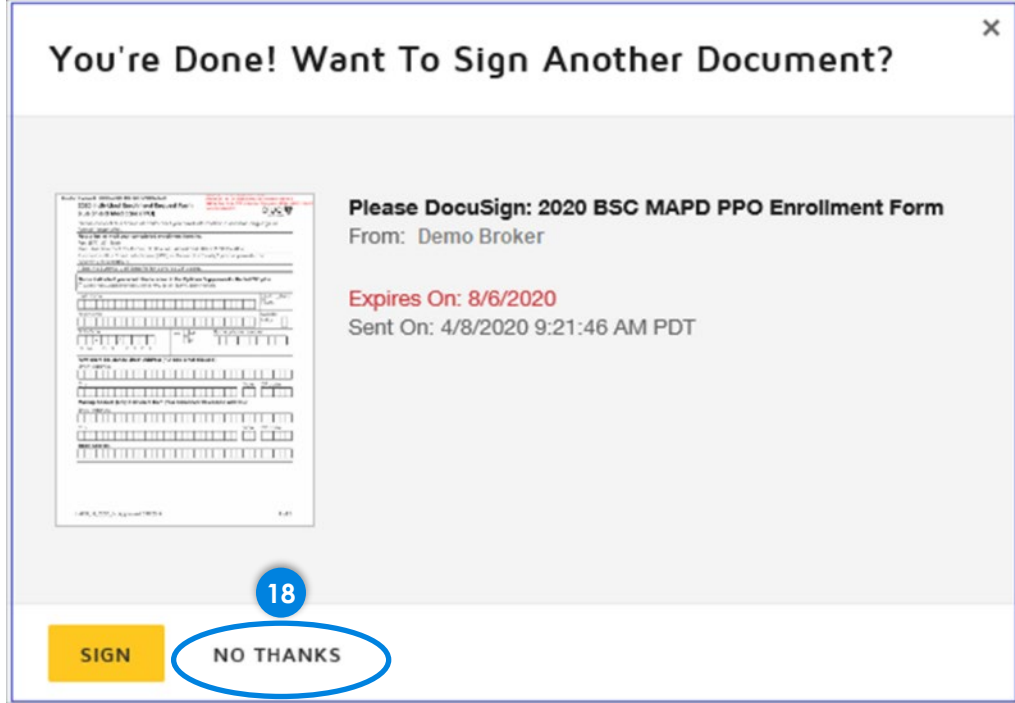
Grey boxes are all fillable but optional.

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.

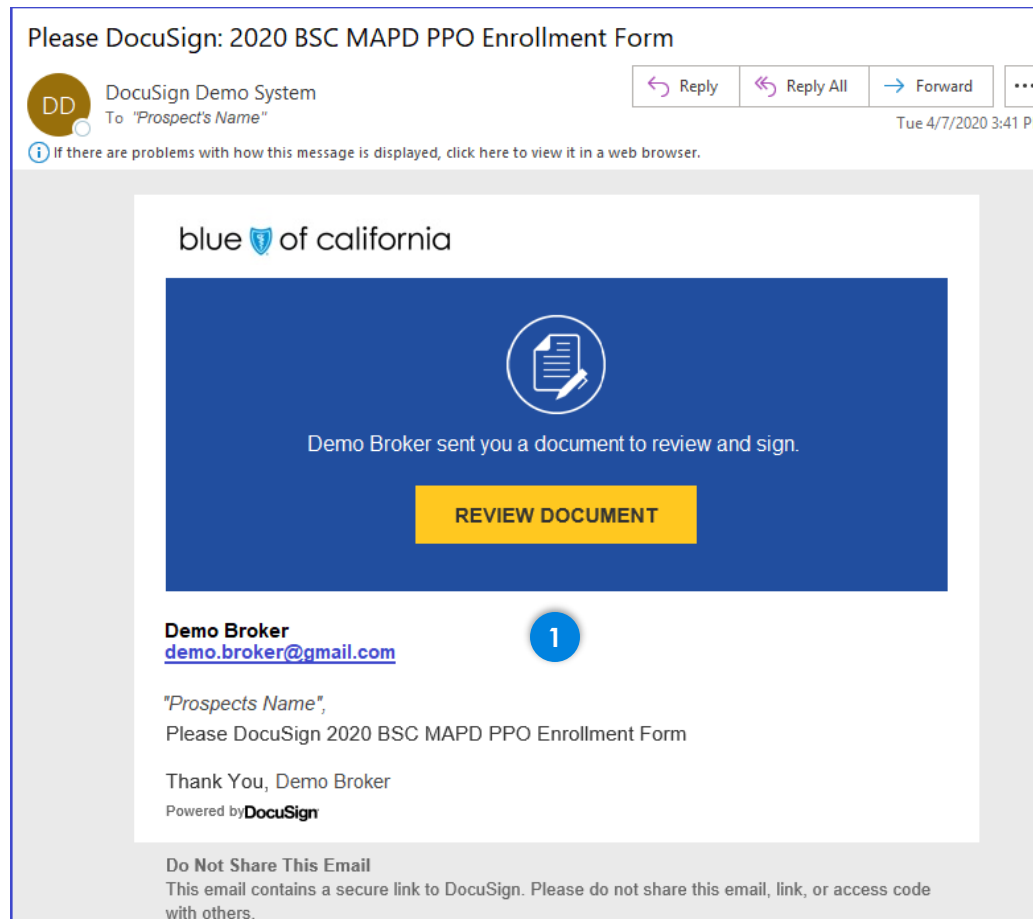


Steps

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

Prospects Views and Actions

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



Steps

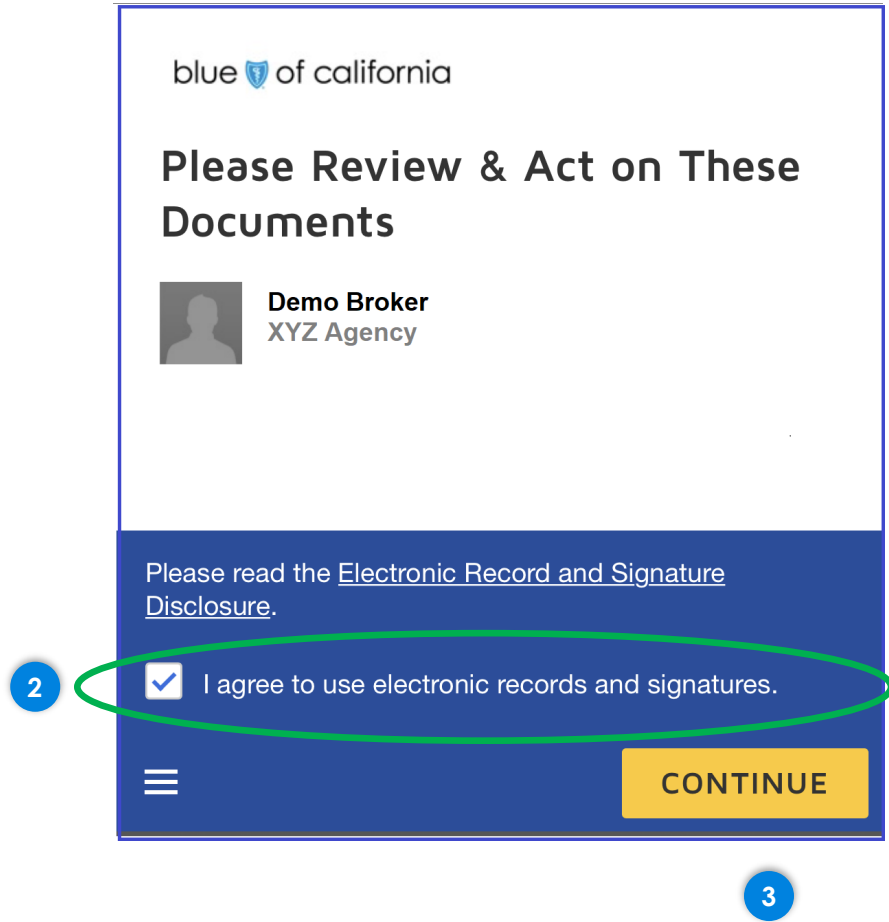
1. Have the Prospect click the <REVIEW DOCUMENT> button.

Prospects Views and Actions

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

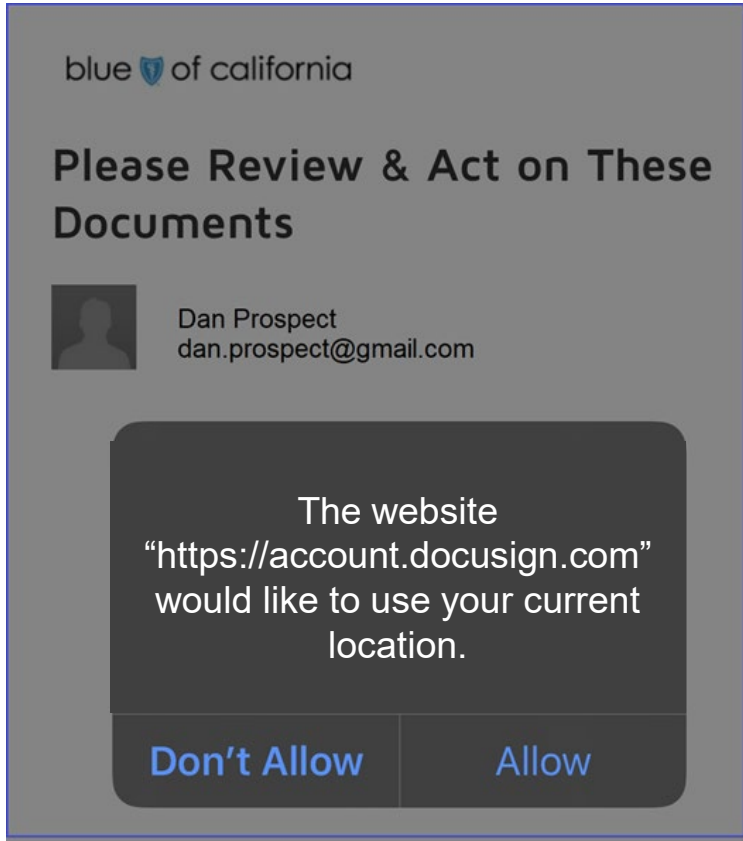
Steps

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

Changes to Shared Fields

Another recipient has made changes to shared fields on this document. These fields are highlighted for your notification and review.

CONTINUE

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.

DocuSign Envelope ID: 94B8FF4B-C575-455C-ACD0-32AAF7113E3B

Dental PPO Plan Enrollment Form for Blue Shield Medicare Supplement Plan Members

Subscriber name (first, last): **Dan Prospect**

Blue Shield subscriber ID number: **9898981101**

Address: **2345 Anywhere Street**

City: **Los Angeles** State: **CA** : **90066-0001**

Medicare supplement plan contract type: Individual Household Savings (see Section 2 below)

1. Dental plan option:

Dental PPO 1000 Dental PPO 1500 Specialty Duo dental + vision package*

2. Household Savings Program enrollment: Must be completed if you have household savings. If you have the Household Savings Program with Blue Shield, you and your other household member need to both select and enroll in the same dental PPO plan or dental + vision package.

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.

Save a Copy of Your Document

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

Email
dan.prospect@gmail.com

Password

Confirm Password

Country
-- select --

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

SUBMIT NO THANKS

9

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.

The screenshot shows the DocuSign eSignature interface. At the top, there are navigation tabs: Home, Manage, Templates, and Reports. The 'Manage' tab is selected. The user is logged in as 'blue of california' with the initials 'KB'. Below the navigation is a blue header bar that says 'Developer Sandbox Environment'. On the left, there is a navigation bar with a yellow 'NEW' button at the top, followed by 'Shared Envelopes', and a section for 'ENVELOPES' containing 'Inbox', 'Sent', 'Drafts', 'Deleted', and 'PowerForms'. A blue circle with the number '1' is positioned over the 'NEW' button. The main area shows an 'Inbox' with a search bar and a 'FILTERS' button. The inbox is filtered by 'Date (Last 6 Months)'. It contains two items:

Subject	Status	Last Change
<input type="checkbox"/> Please DocuSign: BSC PDP Plan Change Form To: Demo Broker, Annie Prospect +2 more	Need to Sign	4/21/2020 02:23:03 pm
<input type="checkbox"/> DocuSign - UAT v1.1: 2020 BSC MAPD Short Enroll Form To: Demo Broker, Annie Prospect +2 more	Completed	4/15/2020 08:47:28 am

At the bottom of the inbox, it says 'Looking for more? | [Edit your filters](#)'.

This is a close-up of the 'NEW' button dropdown menu. The menu is open, showing three options: 'Send an Envelope', 'Sign a Document', and 'Use a Template'. A blue circle with the number '2' is positioned over the 'Use a Template' option.

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.

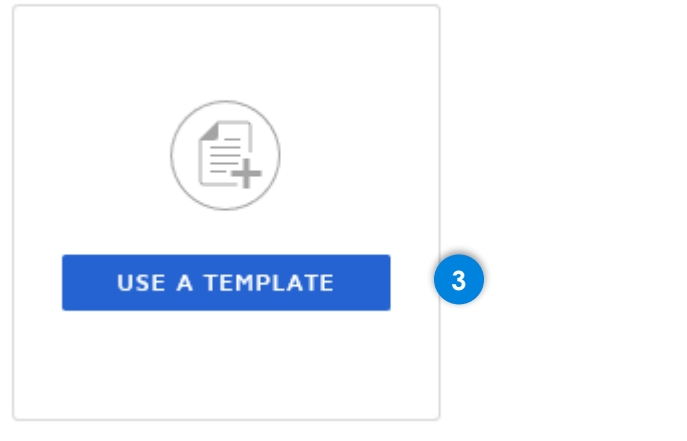
A dropdown will appear with several options.

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.

Add Documents to the Envelope



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.