blue california

Getting Started with DocuSign

Version: Oct 01, 2023

Introduction

BlueShield of California (BSC) instance of DocuSign has a set of customized applications for BlueShield of California (BSC).

Brokers/Agents/Sales Representatives are to use only those applications they are endorsed or appointed to sell.

- MAPD and PDP applications require Brokers to be licensed and certified.
- If a Broker/Agent/Sales Representative sells a product for which they are not certified to sell, they will not receive credit and/or a commission for the sale.

IMPORTANT:

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

Terms

Envelope:

- This is a transaction generated within the application.
- **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.

Steps

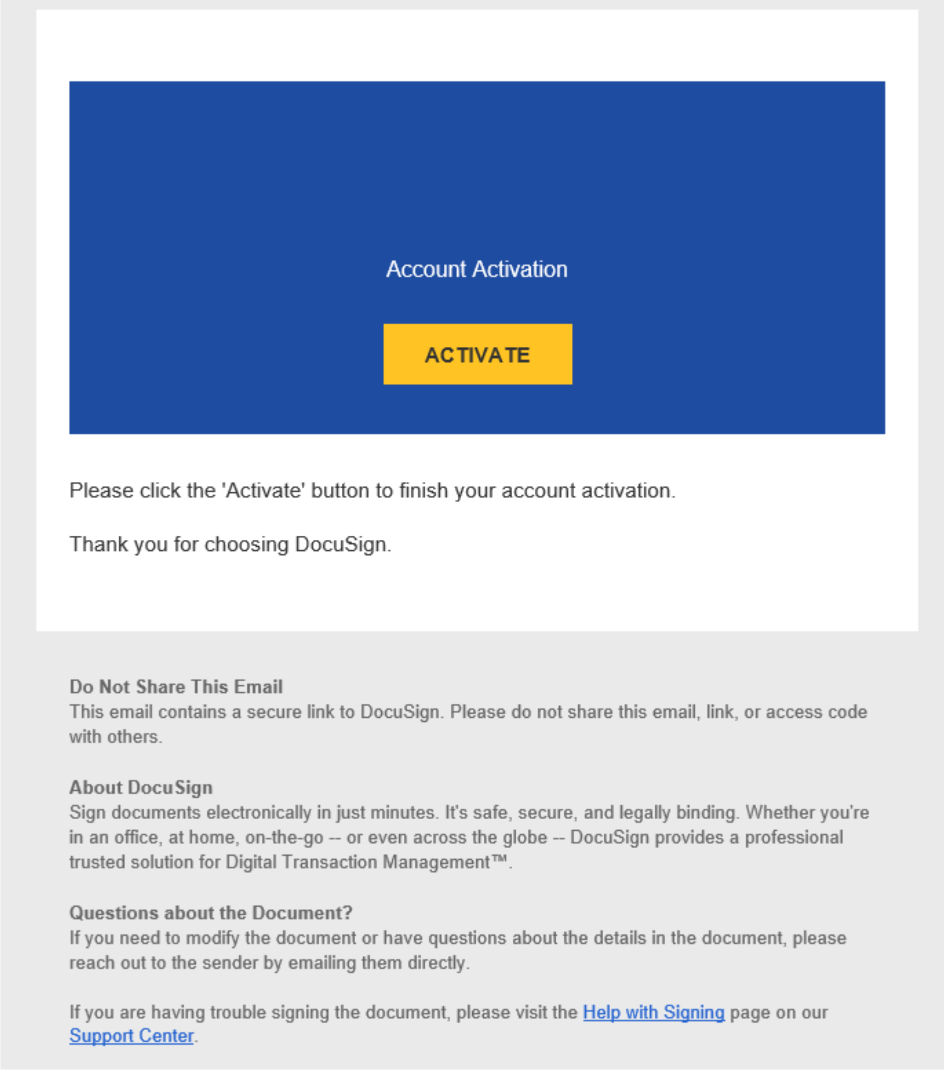
1. External Brokers should request the electronic form be emailed to them from their Broker Sales Manager or contacting Producer Services.
2. Brokers should use a "unique" email address for BSC Docusign on the request form and not the same email used for other Docusign services the broker may be using, to avoid system conflicts.
3. 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

Activation

Brokers must activate their accounts using the Activation email the system sends to them.

The Activation email can take 3-10 days to receive after submitting the Access Request form.



Account Activation

ACTIVATE

Please click the 'Activate' button to finish your account activation.

Thank you for choosing DocuSign.

Do Not Share This Email
This email contains a secure link to DocuSign. Please do not share this email, link, or access code with others.

About DocuSign
Sign documents electronically in just minutes. It's safe, secure, and legally binding. Whether you're in an office, at home, on-the-go -- or even across the globe -- DocuSign provides a professional trusted solution for Digital Transaction Management™.

Questions about the Document?
If you need to modify the document or have questions about the details in the document, please reach out to the sender by emailing them directly.

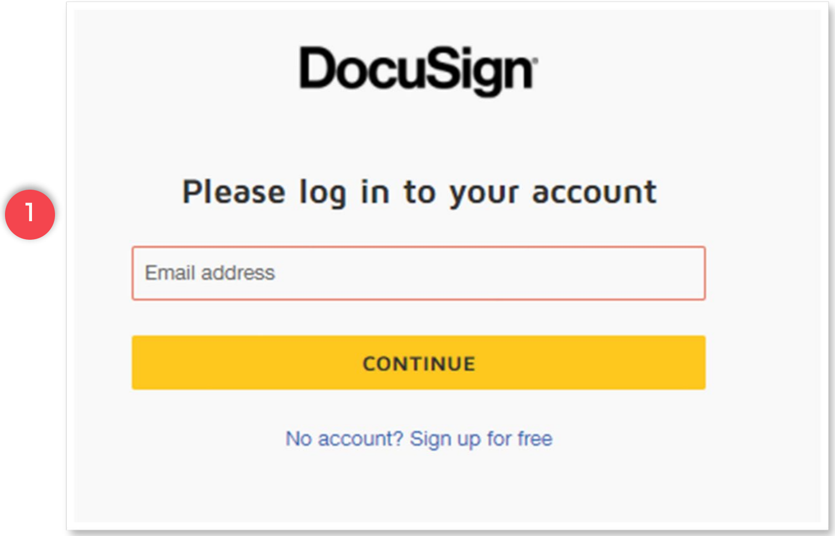
If you are having trouble signing the document, please visit the Help with Signing page on our Support Center.

Accessing the Blue Shield DocuSign Site

1. Open the email and click the link to activate the account.

Logging In

When accessing the site for the first time you will be asked to enter your email address. Use the same email you provided on your Access Request form.



Steps

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

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

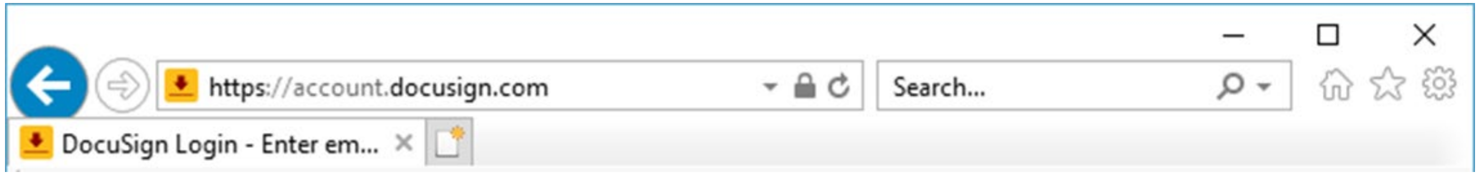
If you forget your password, use the Forgot Password link below the Log In button to request a new password.

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)



Blue Shield DocuSign URL:
https://account.docusign.com

Save the Link – you can only use the Activation email once.

For subsequent login – you must use the URL above.

1. Copy and paste this URL to your "address line."
2. **Create a shortcut on your desktop** using the above as the "location" or **save to your browser favorites.**

Accessing the Blue Shield DocuSign Site

Use the internet address to access the Blue Shield of California's DocuSign.

- Copy and paste this to your "address line" for the internet.

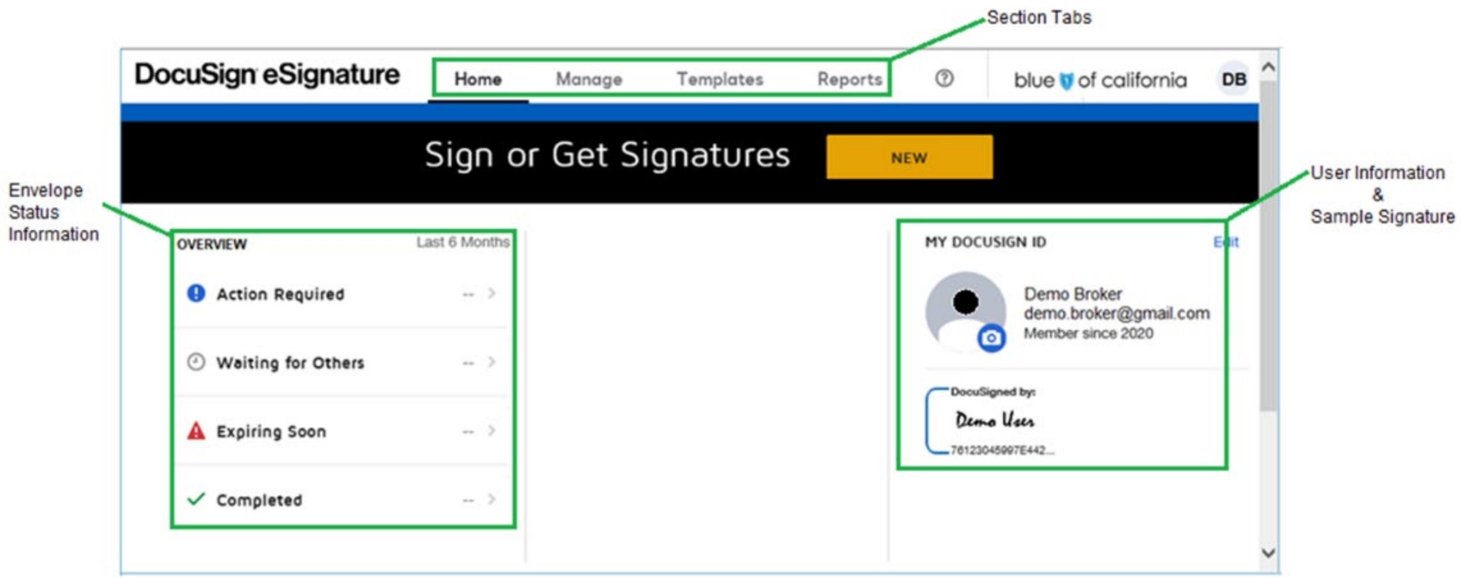
or

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

Initial Login

When you log-in, the home page displays.

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.



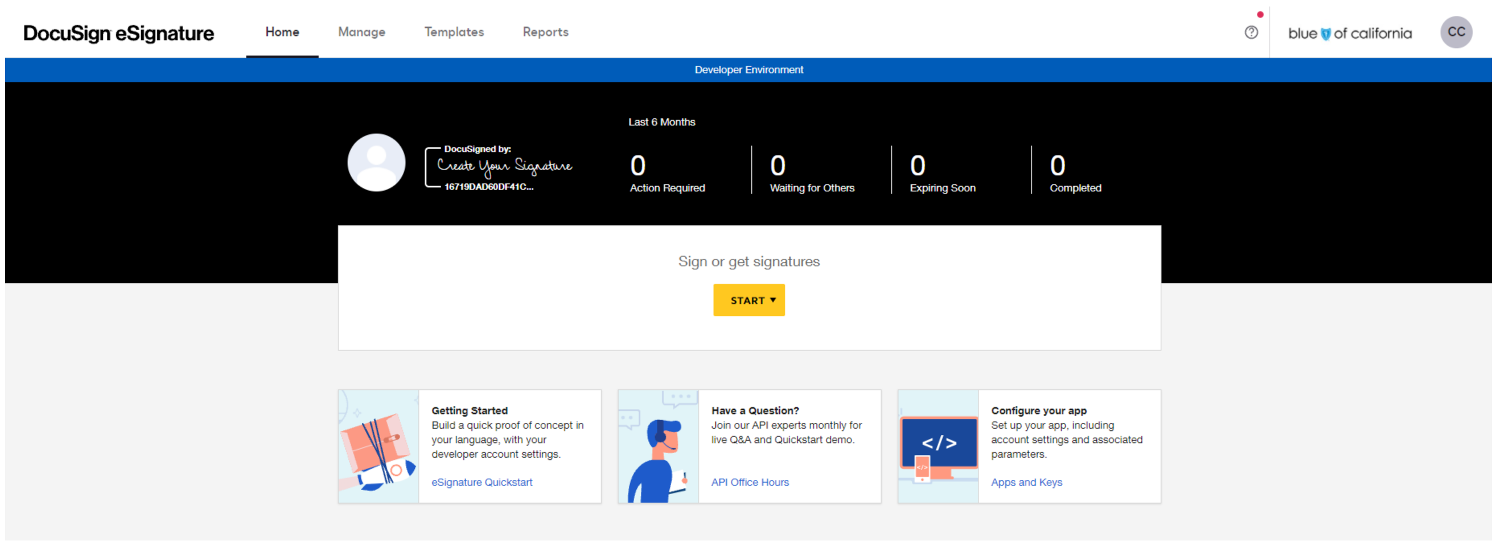
Note

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

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.

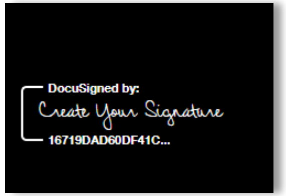
Quick Signature Change

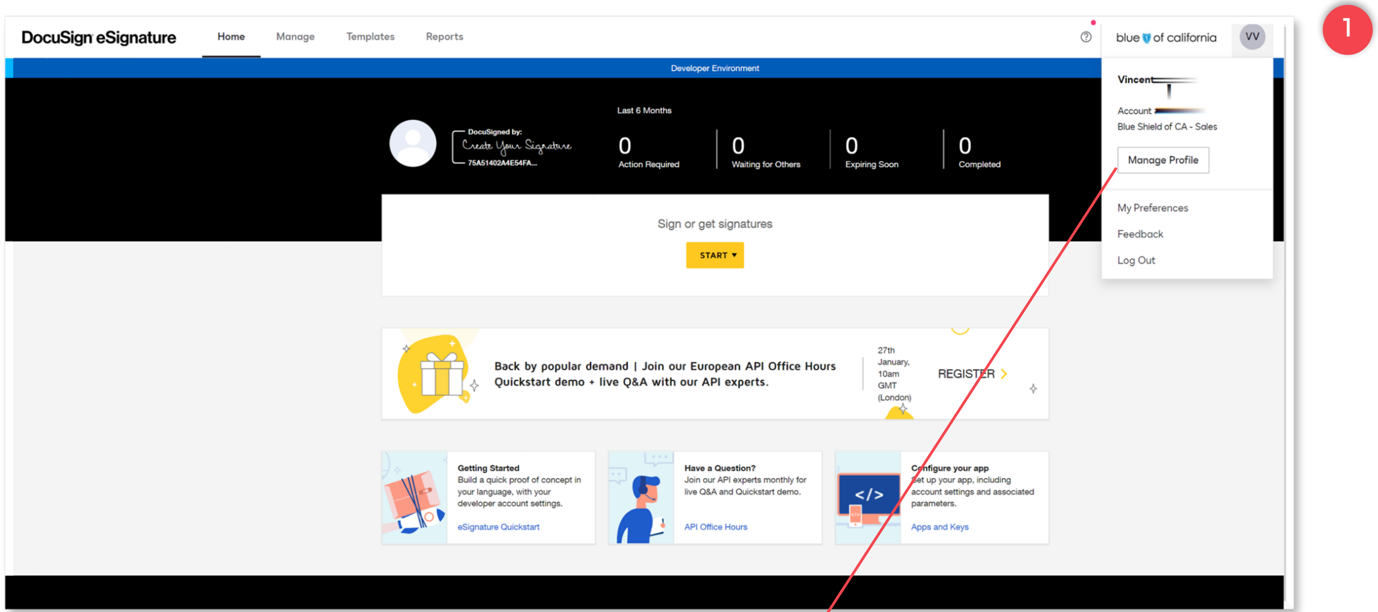
The first thing the Broker will need to do is complete your user Profile and DocuSign Signature.

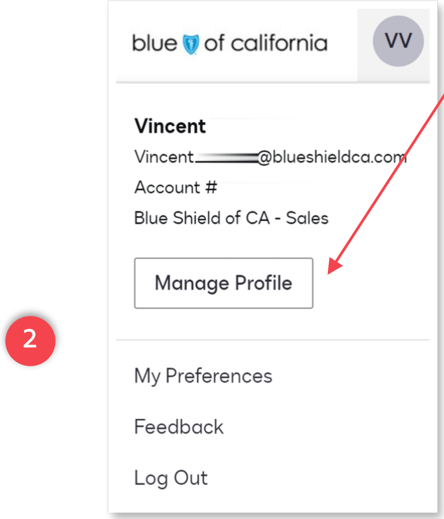
To change your signature:

1. Click on the signature image at top-left of the home screen.

2. A new pop-up window opens. Select a signature from the list.







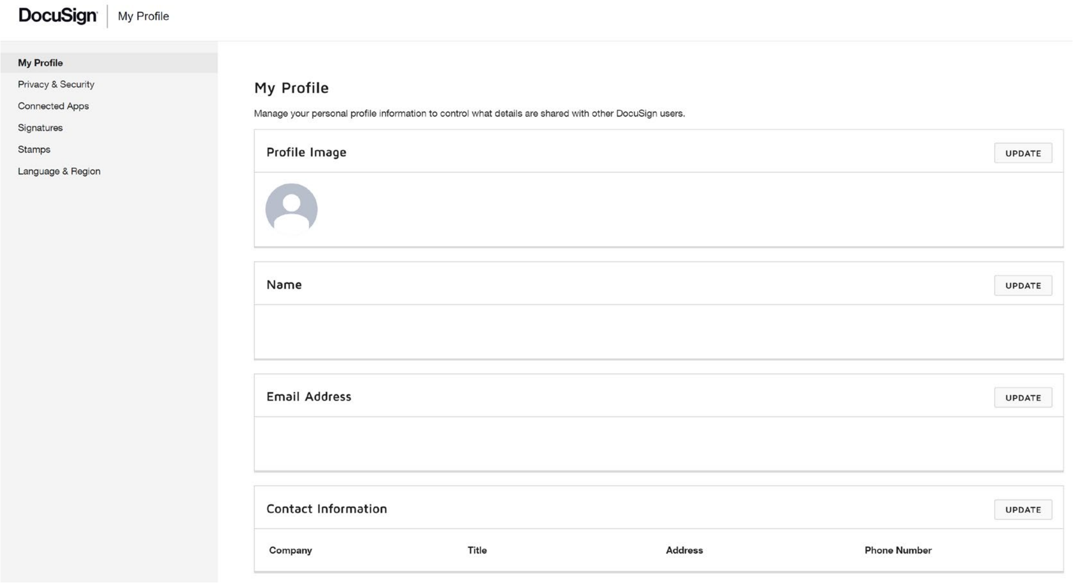
Manage Your Profile Steps

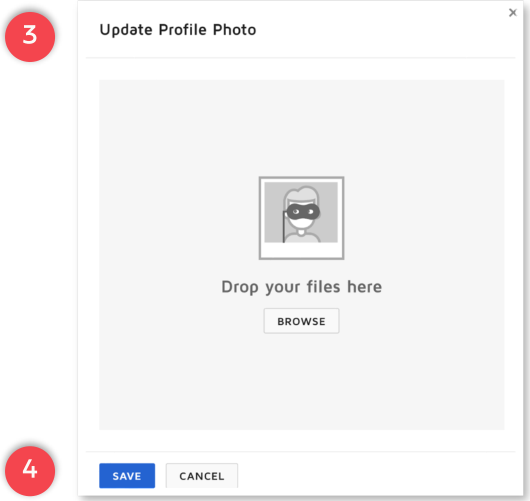
1. "My Profile Information" can be located by clicking on your initials located on the top right-hand portion on the screen.
2. User information will display.

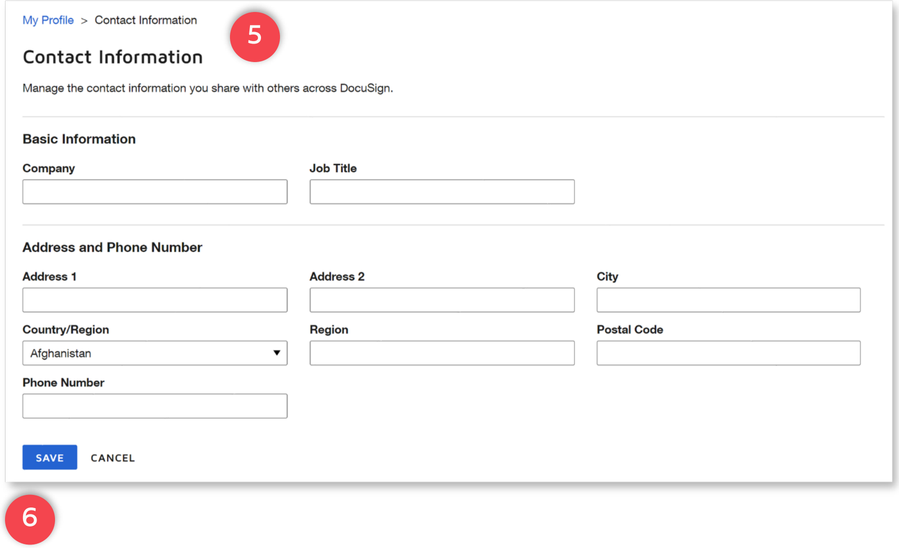
   Select "Manage Profile" to be directed to "My Profile Information".

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

The “My Profile Information” screen will display in a new tab window.

As you scroll down the page you will see several sections where you can update information.

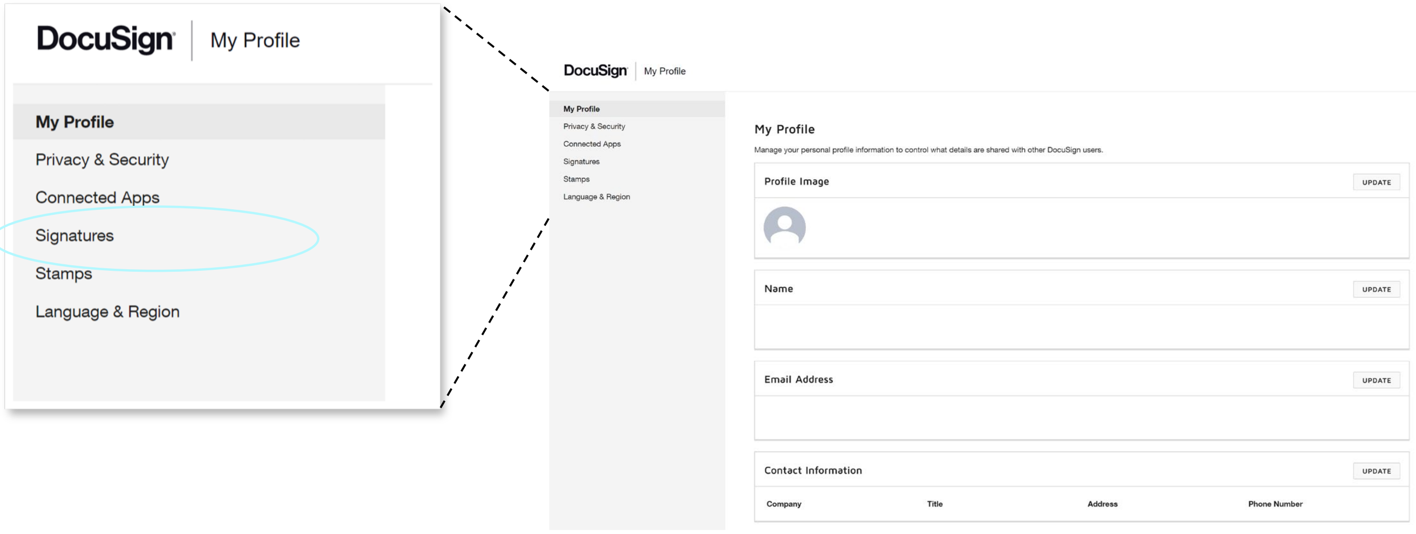
3. Upload your Profile Photo.
4. Click the <Save> button to complete profile update.
5. Next, fill in your Contact Information.

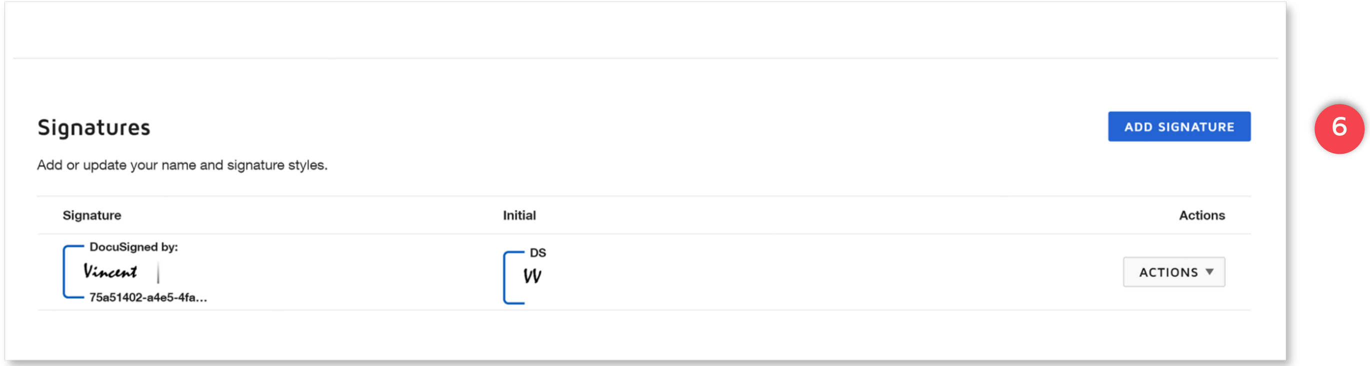
   Note: If you see Blue Shield Sales in the Company and Job Title fields; please feel free to change it to your company name and job title.

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.



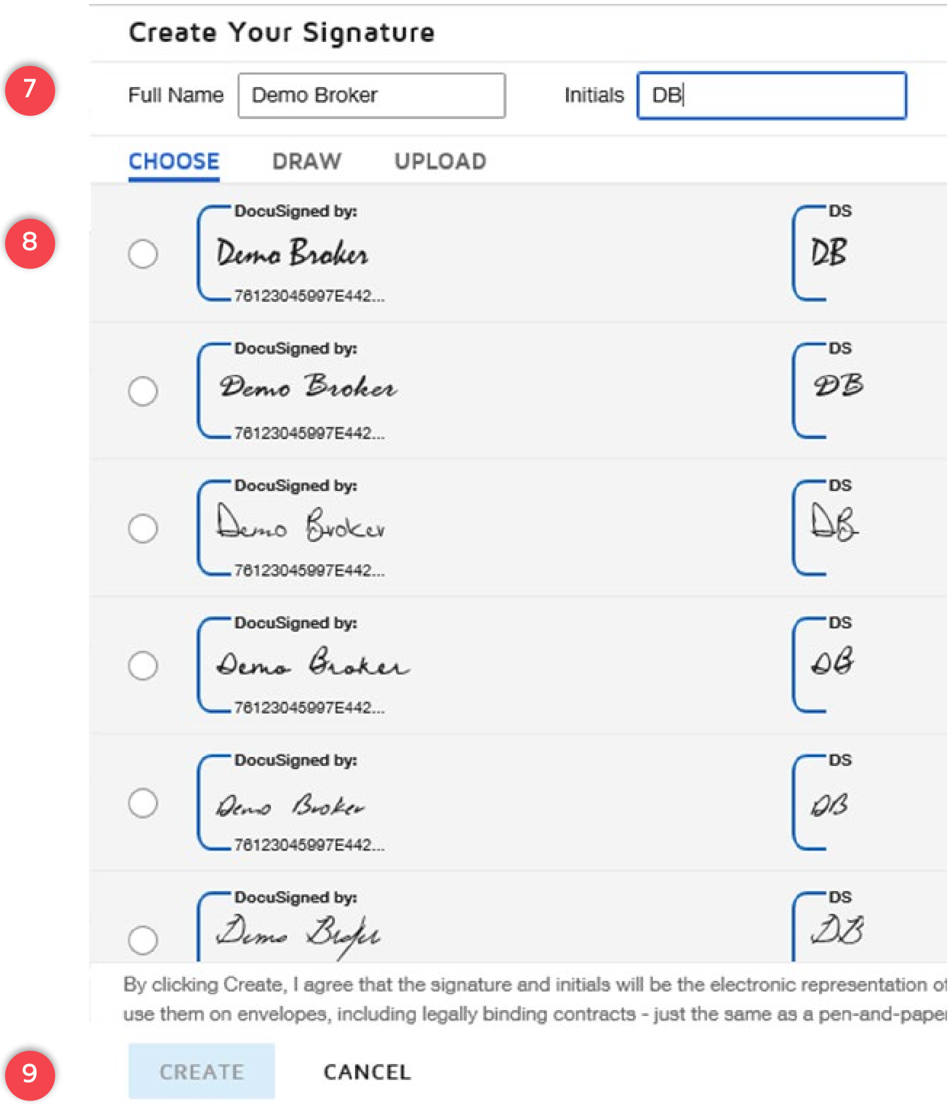


Steps

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

Creating the Brokers Signature

The manage signatures pane will open to the right.



Steps

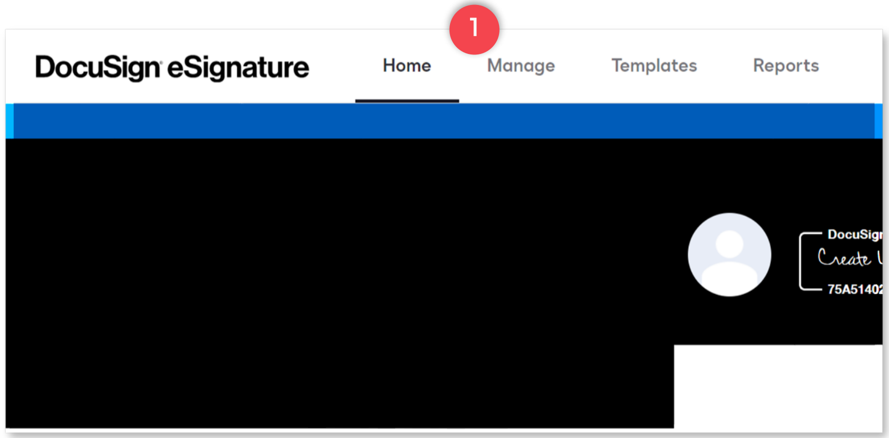
7. If the “Full Name” is not correct, click into the box and type in the desired name.

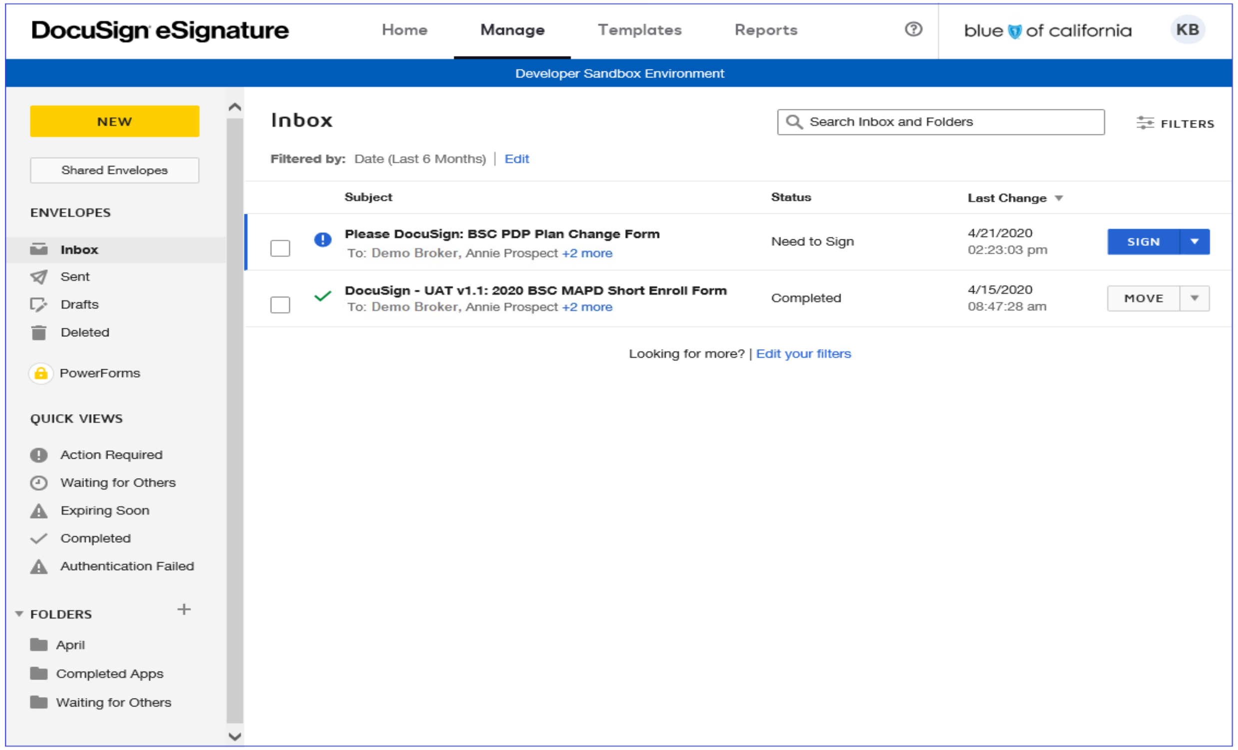
   If the “Initials” need to be modified, click in the box and type in the correct initials.

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.
10. Once all updates are completed, close the tab to return to the main window.

Manage Screen

The Manage screen is used to manage your email.





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 (email box)
- Quick Views
- Folders

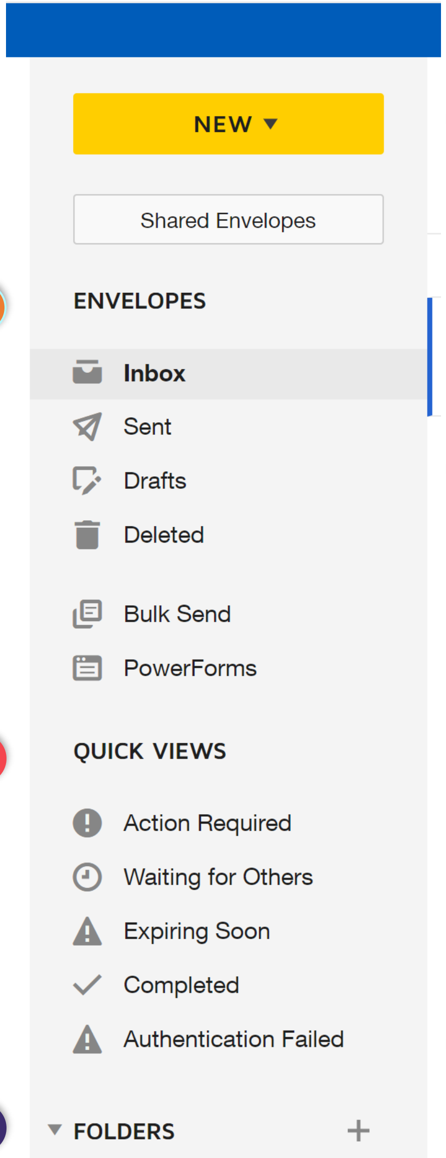
Note:

Quick Views are available for access on the Home Screen.

A

B

C



A

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.

B

Quick Views

The quick view functions act as a filter for the envelopes in a particular status (within the inbox).

- Action Required filters items broker needs to take an action on.
- Waiting for Others filters items that the prospect needs to take action on.
- Completed filters fully completed applications and are available for download.
- 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.”

Note: To remove the filter, you have to click on the “Inbox” to discontinue filtering the content.

C

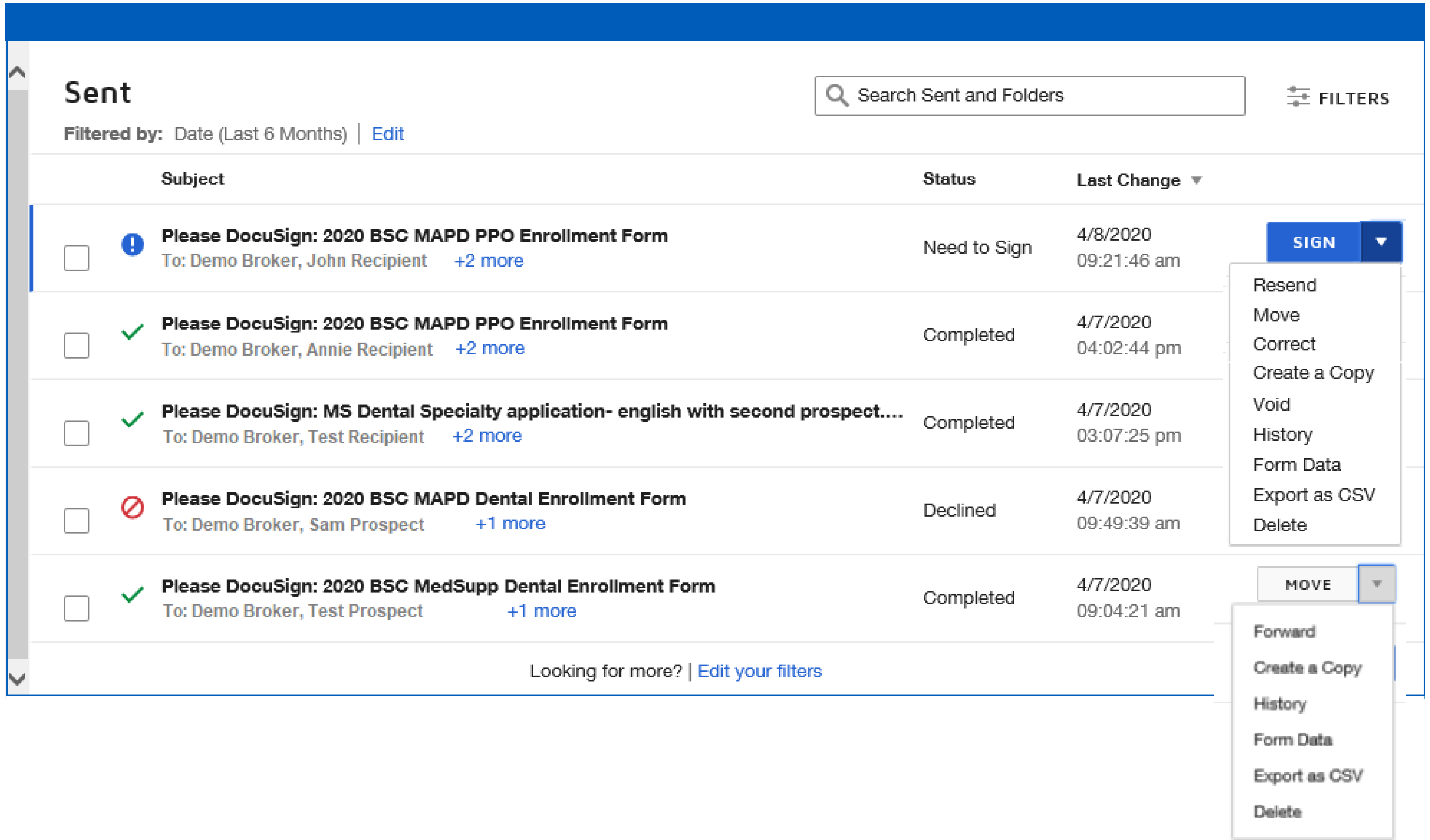
Folders

- 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

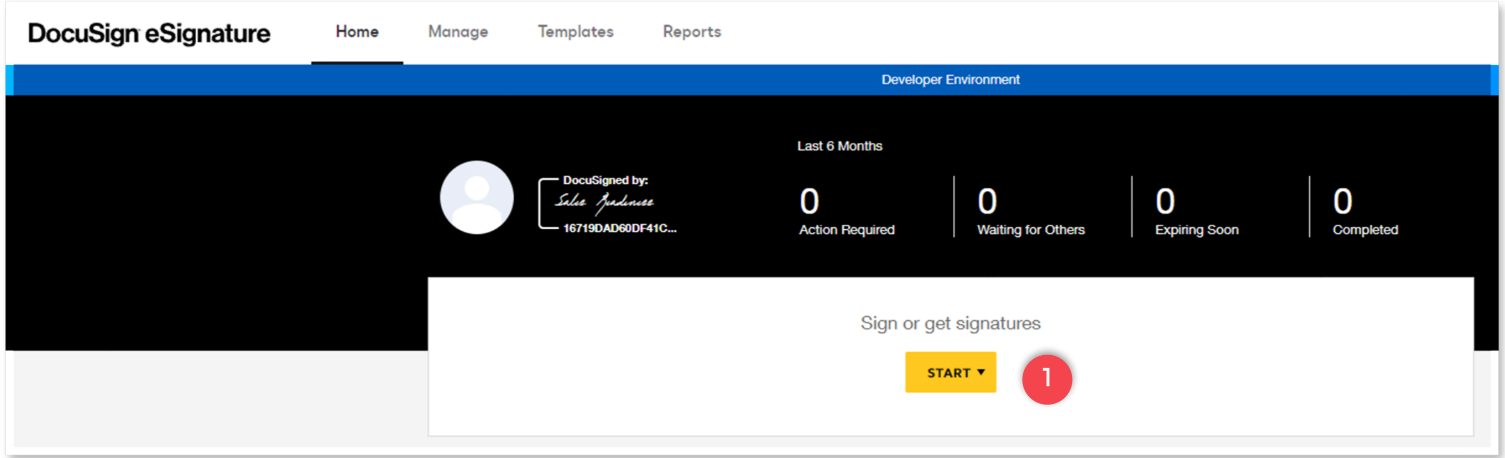
Please don’t use the **Correct** function and try not to **Void** applications.

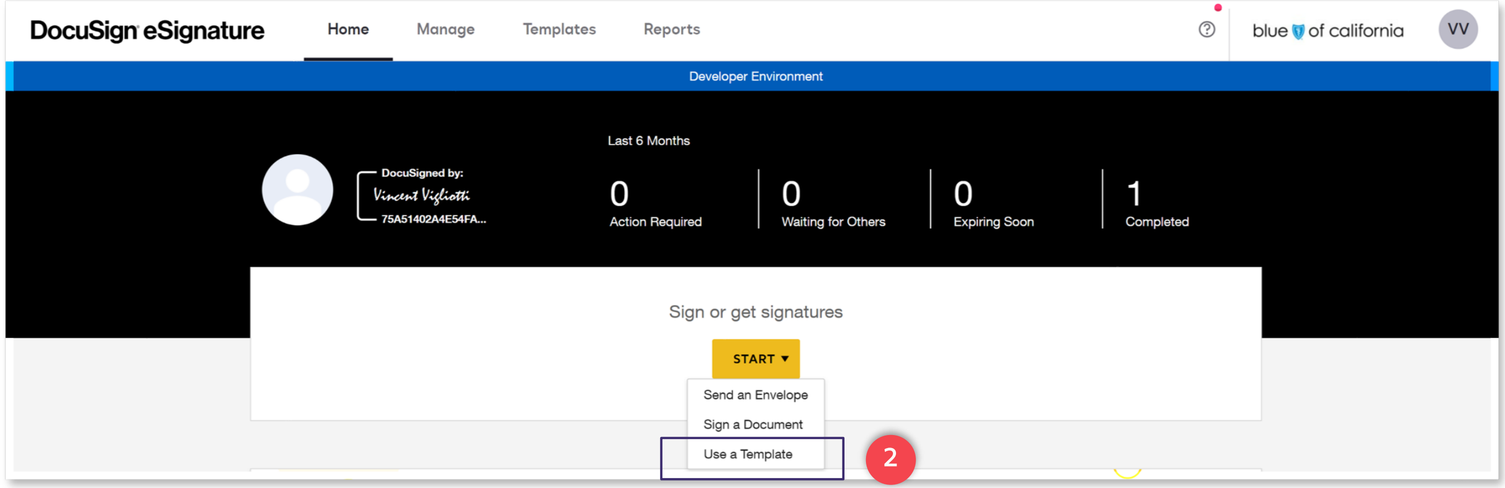
Start an Application

There are several methods for starting an application.

This reference document will focus on the template method only.

For other methods such as "Send an envelope," please consult your Broker Manager for assistance.





Use a Template Method

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

   A dropdown will appear with several options.

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

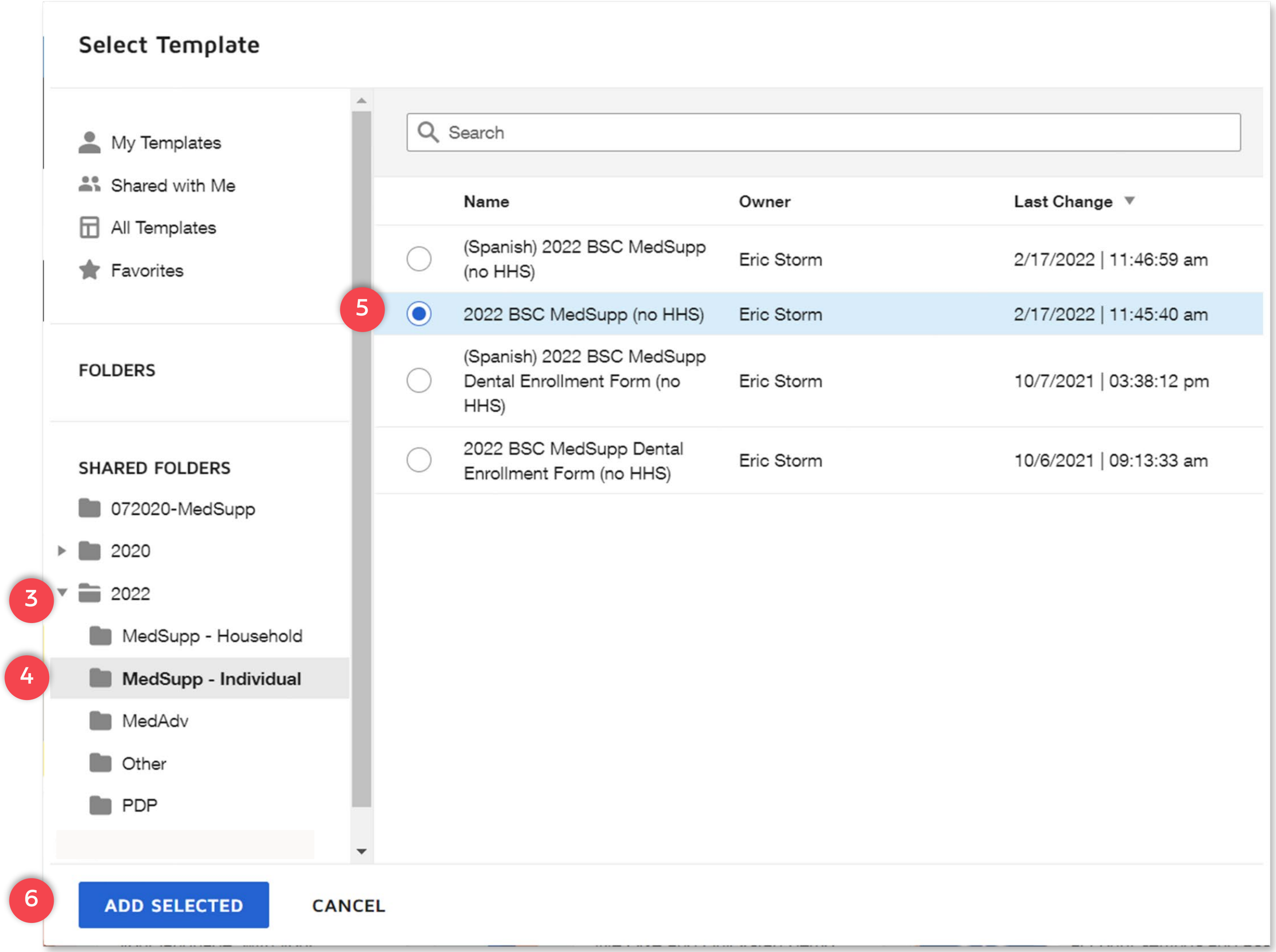
Expand Folder

Expand the year folder to view application type folders.

(HHS) = Household Savings Section of Medicare Supplement Application Template is enabled.

(No HHS) = Household Savings Section of Medicare Supplement Application Template is not enabled.

If you need to do a set of HHS applications for 2 people in the same household, it is suggested you contact your Broker Sales Manager for the first time.



Steps

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

   The Select Templates screen will display.

4. Select application type folder to display application templates.
5. Select an application template in the language of choice.
6. Click the <ADD SELECTED> button

IMPORTANT

You must click on the arrow to expand the folders.

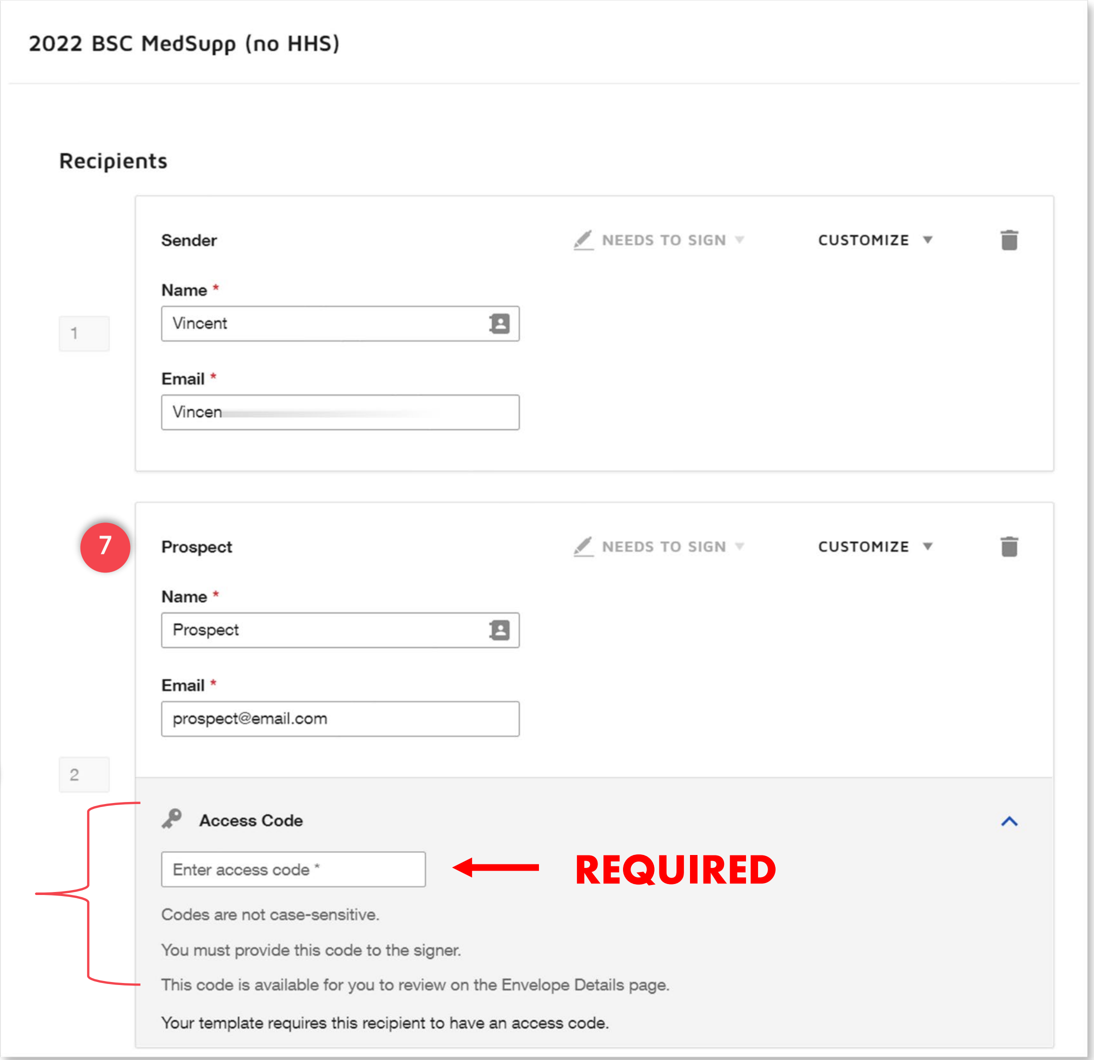
Clicking on the folder or the name does not expand the folder list.

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.

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

7. The Sender field is automatically embedded broker name and email.

   Complete the Prospect information.

   Note:
   The Prospect Name field needs to match the Medicare card of the prospect.

8. Use one of the following layouts for the Access Code.

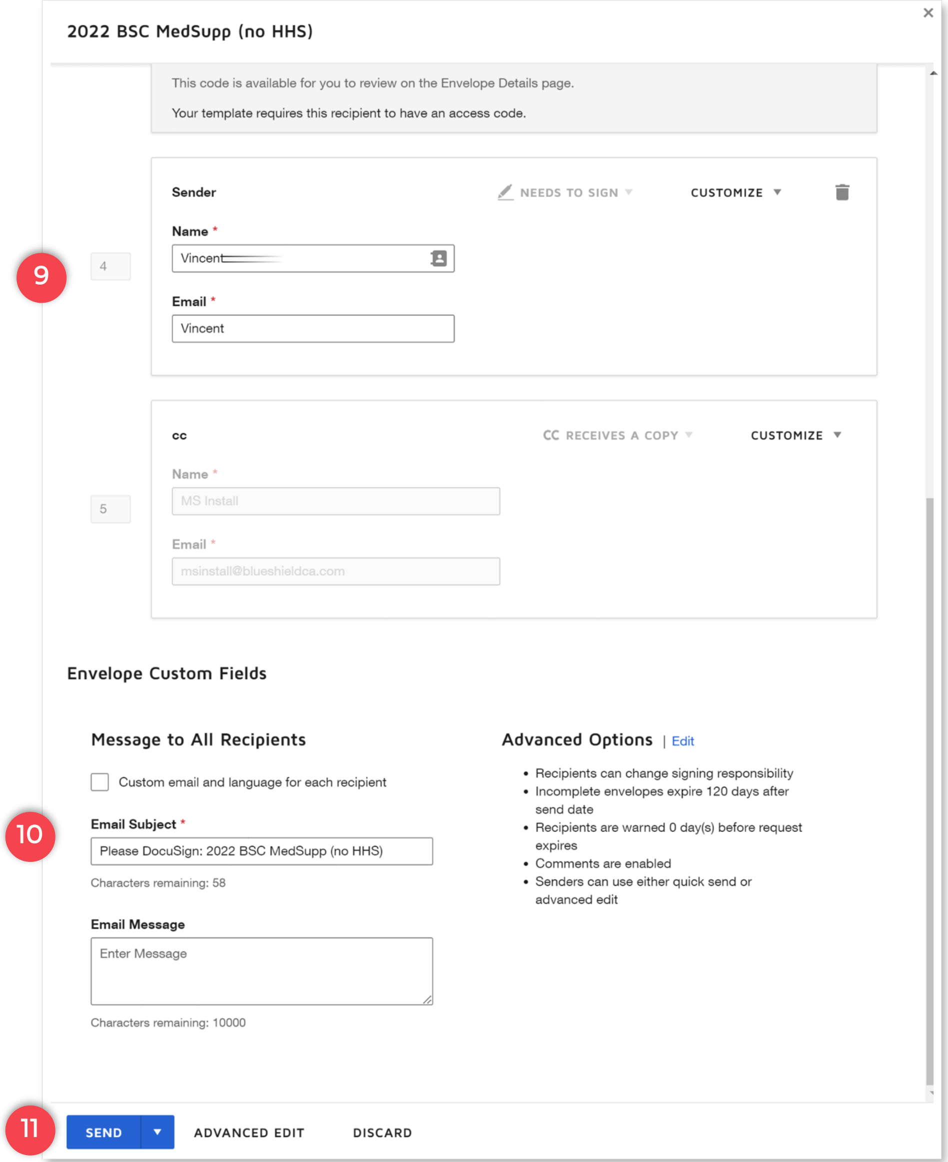
   - Prospects initials plus their zip code.
   - Prospects initials plus the last 4 digits of their phone number.
   - First 3 letters of the Prospects last name plus the last for digits of their phone number.
   - A minimum of 6 characters is required.

Sending the Application

The 4th box is the Sender, who is the Broker. This will route the Prospect signed application back to the Broker for review and final broker signature.

NOTE:

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



Steps

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

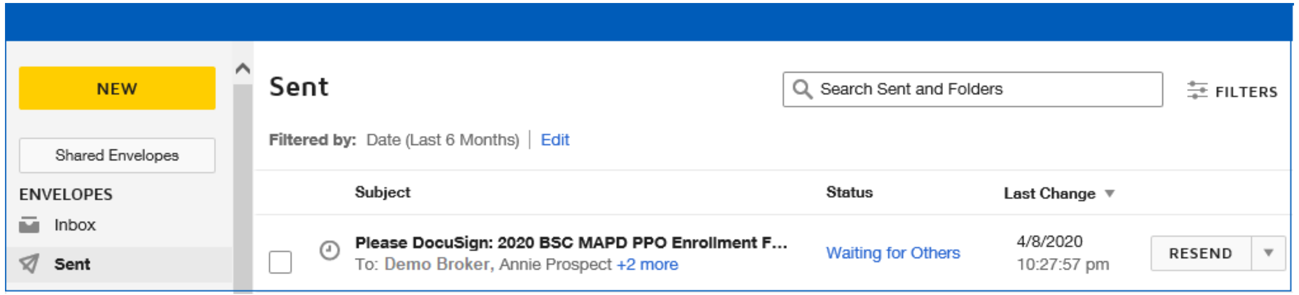
A standard message is included in the email, however the Broker can customize the message included in the email to the Prospect.

9. Confirm the Broker name and email is correct.
10. Enter a short email message.
11. Click the <Send Now> button.

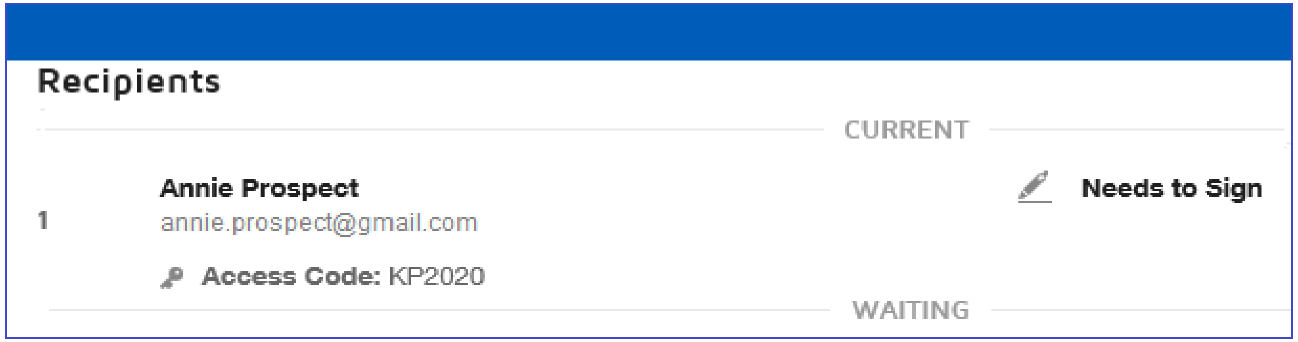
Forgotten Access Code

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.

Adding Recipient(s)

The following screen will display for the Broker.

12

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

12. 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

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

Pre-Filling the Application

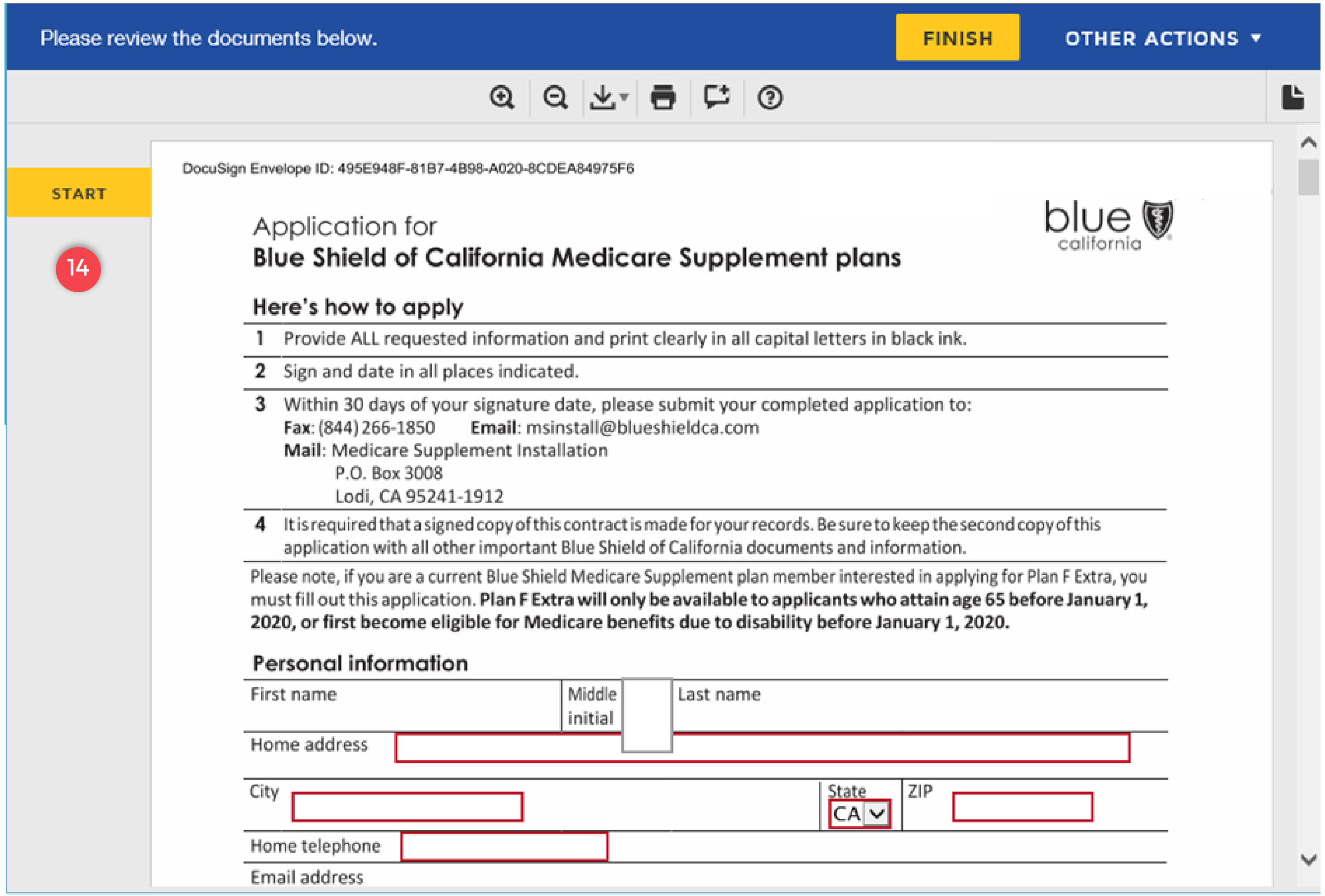
The selected application template will display.

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

14. 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.

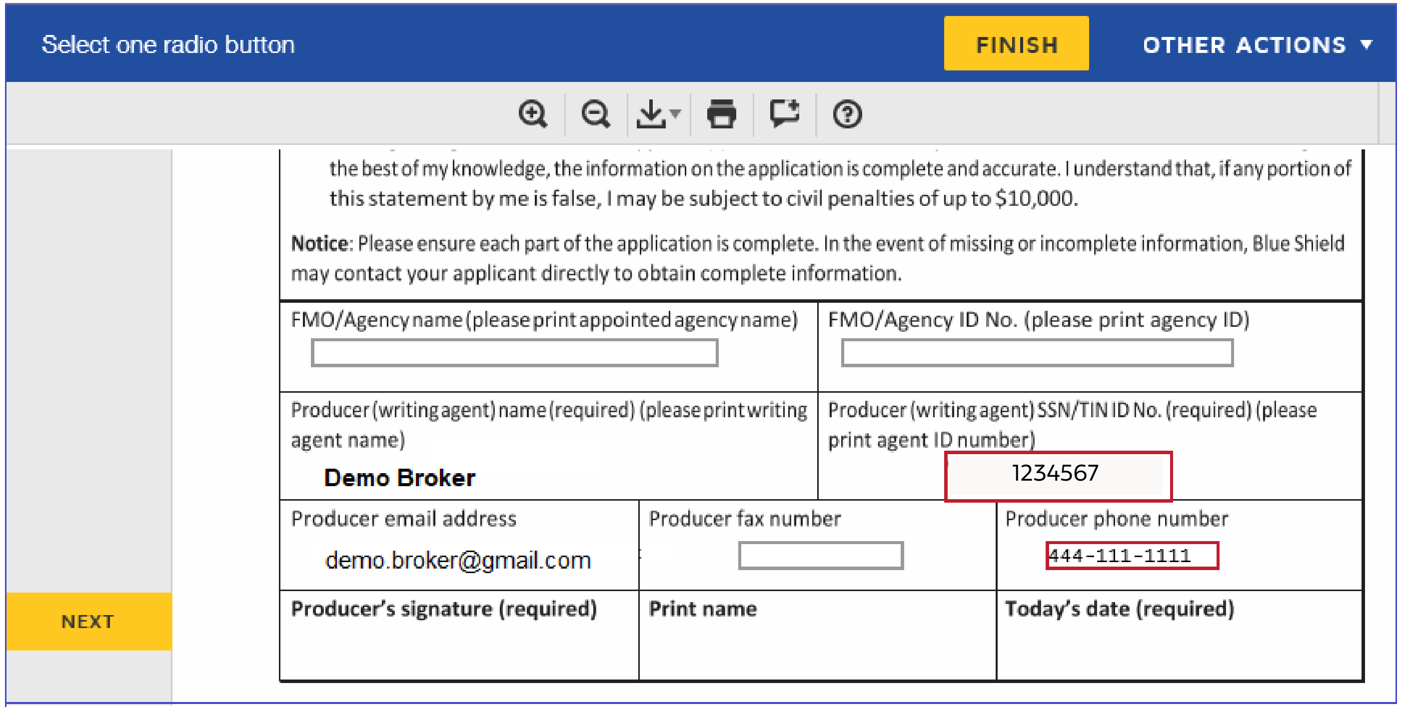
    Note some fields require specific formatting.

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

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

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

Note:
The Producer's Name, NPN ID and phone number are required. To look up your NPN, please visit: https://nipr.com/help/look-up-your-npn

Important

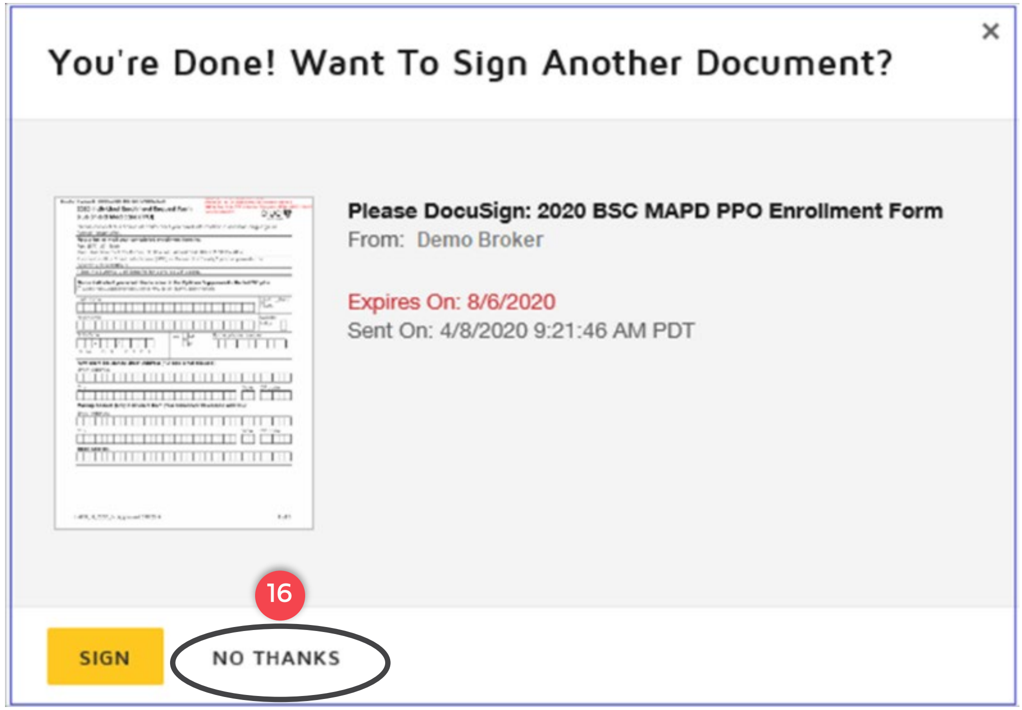
Grey boxes are all fillable but optional.

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.

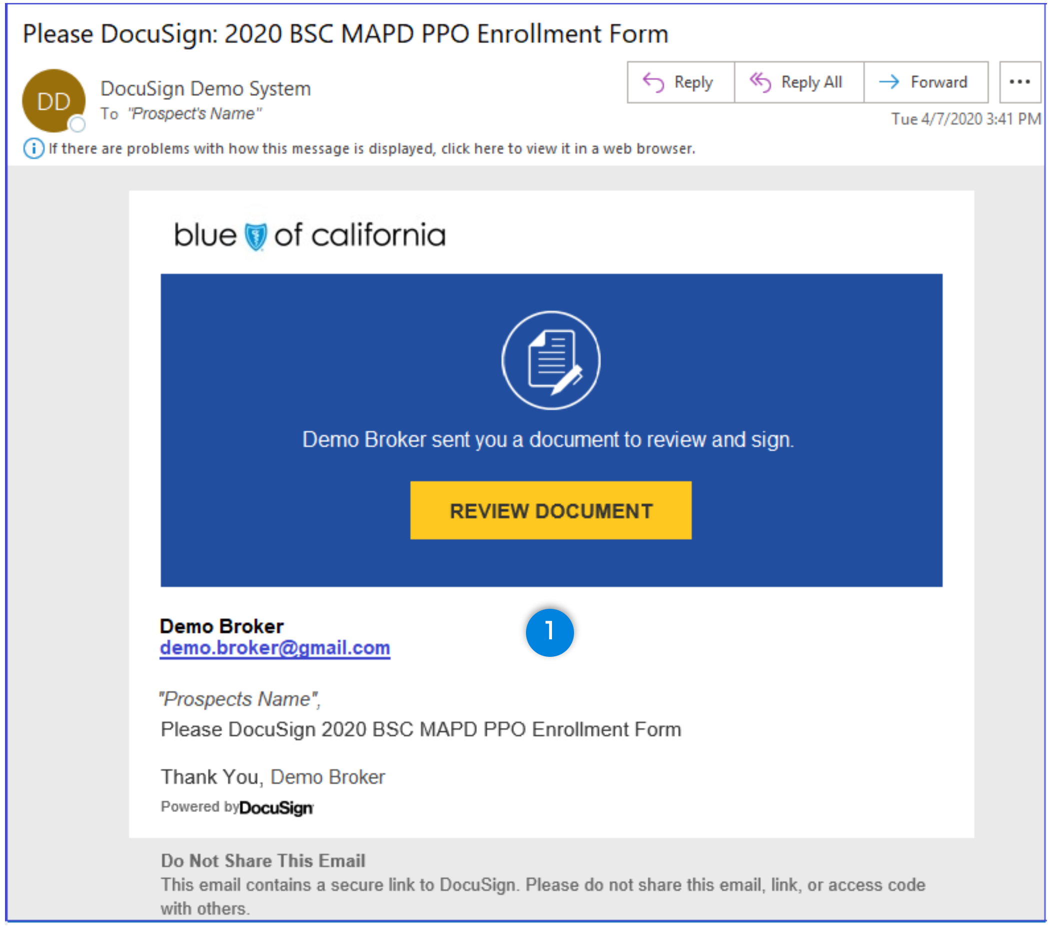


Steps

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

Prospects Views and Actions

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



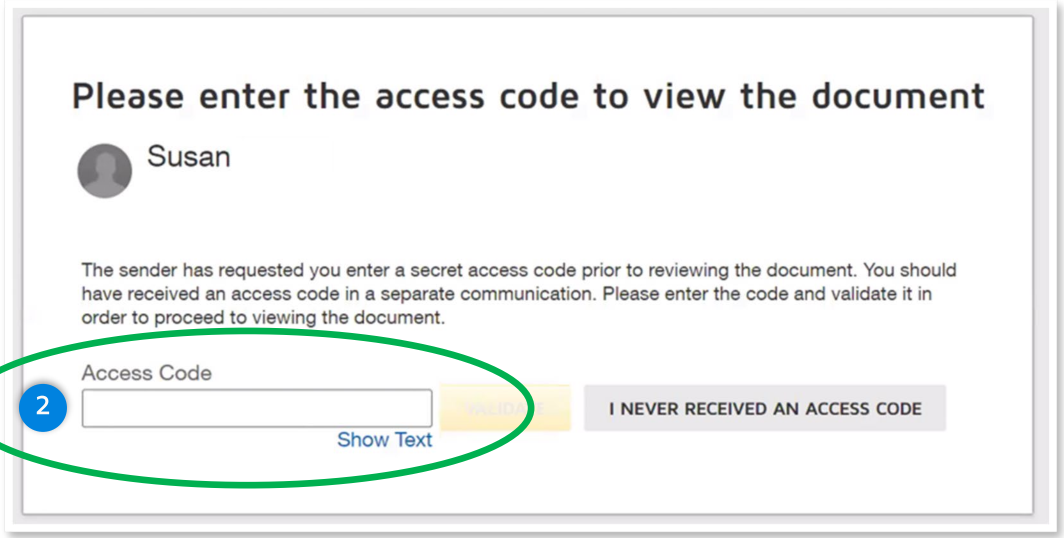
Steps

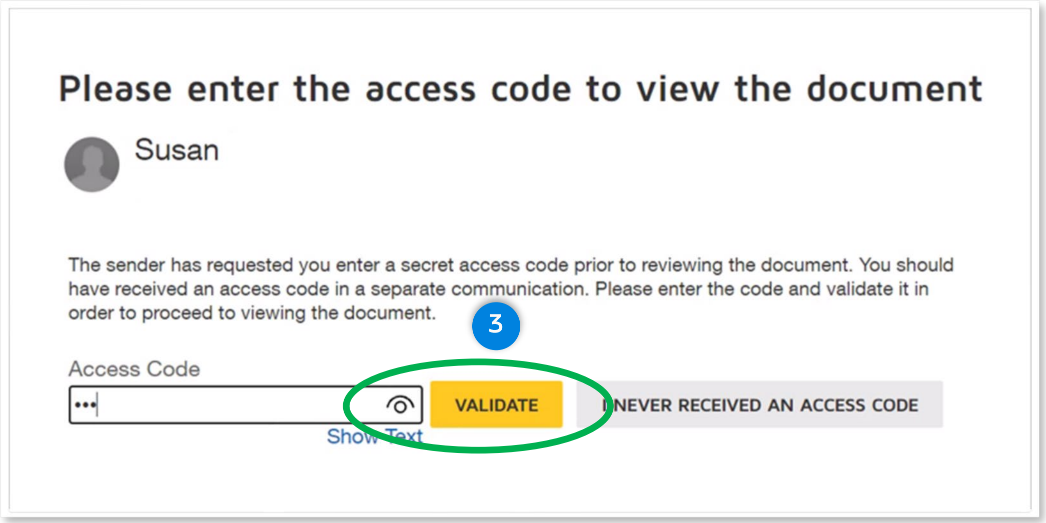
1. Have the Prospect click the <REVIEW DOCUMENT> button.

Prospects Views and Actions

Once the prospect click on the “Review Document” button from the email, a pop up will display advising “Please enter the access code to view the document”.

Next the Prosect will need to click “Validate” to continue.





Steps

2. The Prospect will be asked to enter an Access Code
3. Once the code is entered, they will need to click <Validate>

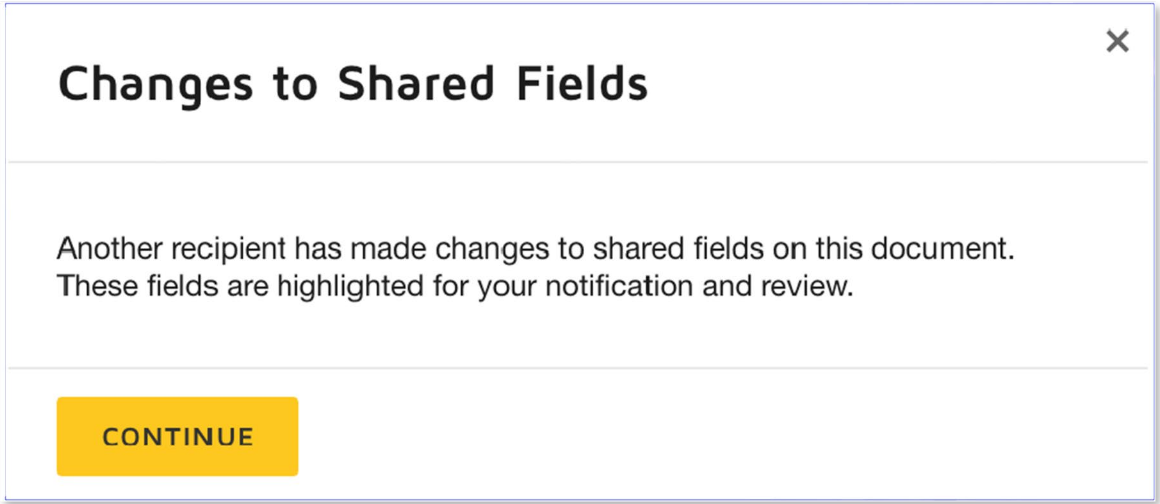
Prospects Views and Actions

The document will start to load.

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.

4



Steps

4. A pop will appear the Prospect needs to click <Continue>.

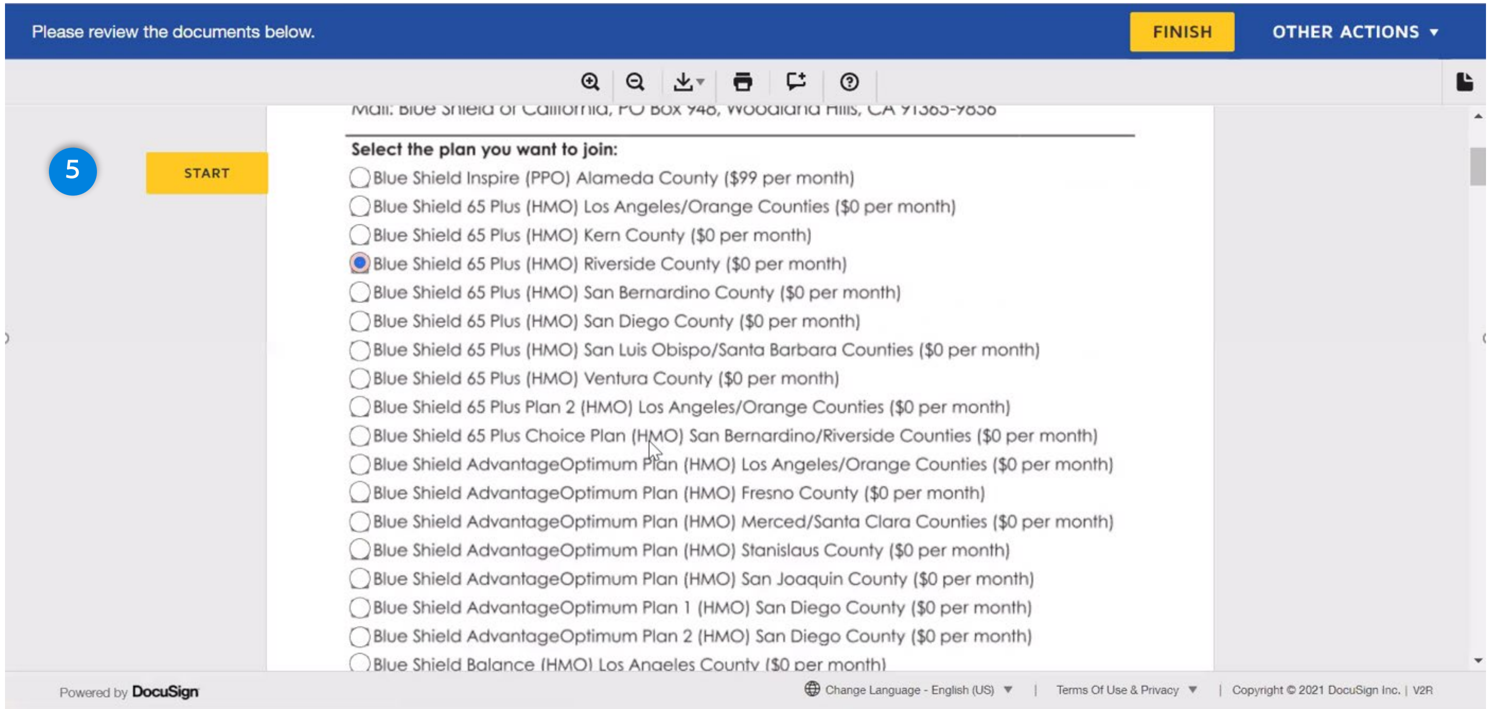
   This enables the Prospect to have knowledge of the fields that need to be reviewed.

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.



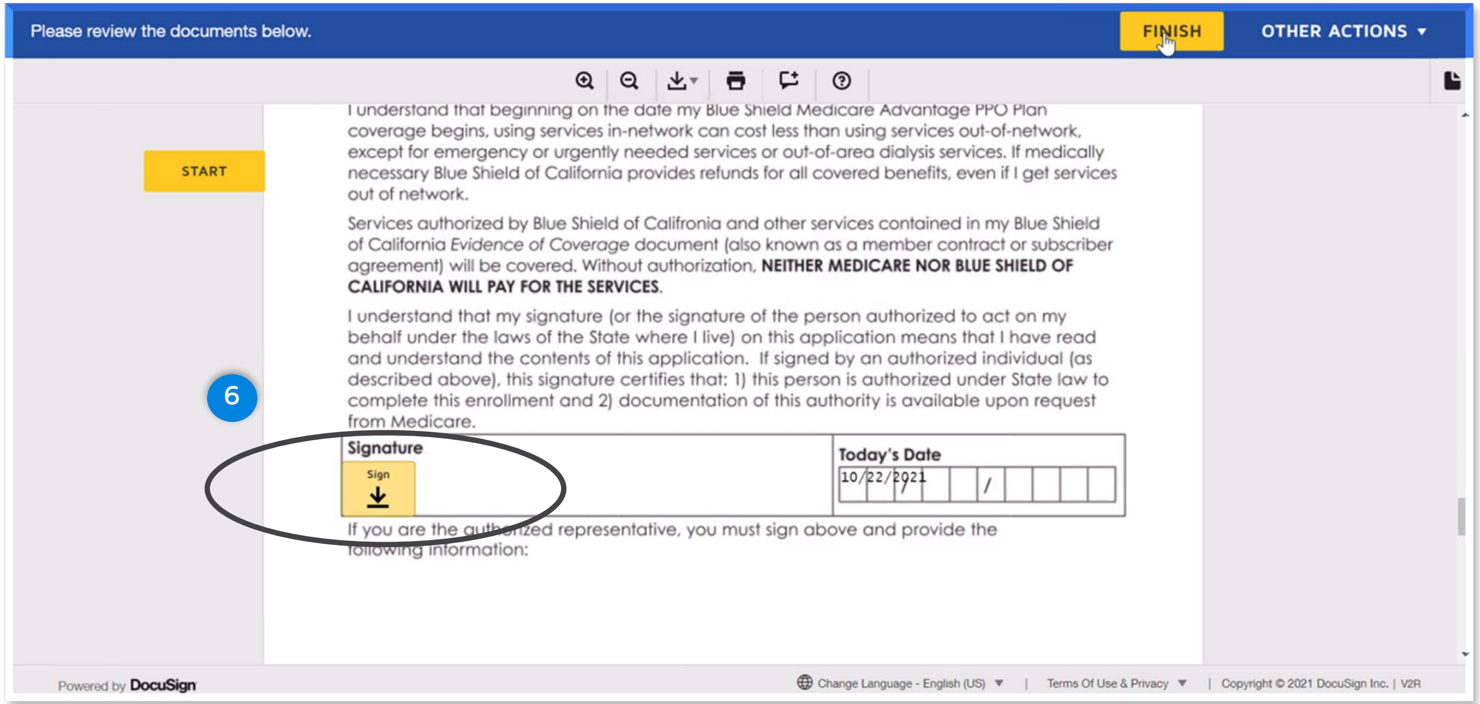
Steps

5. 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.



Steps

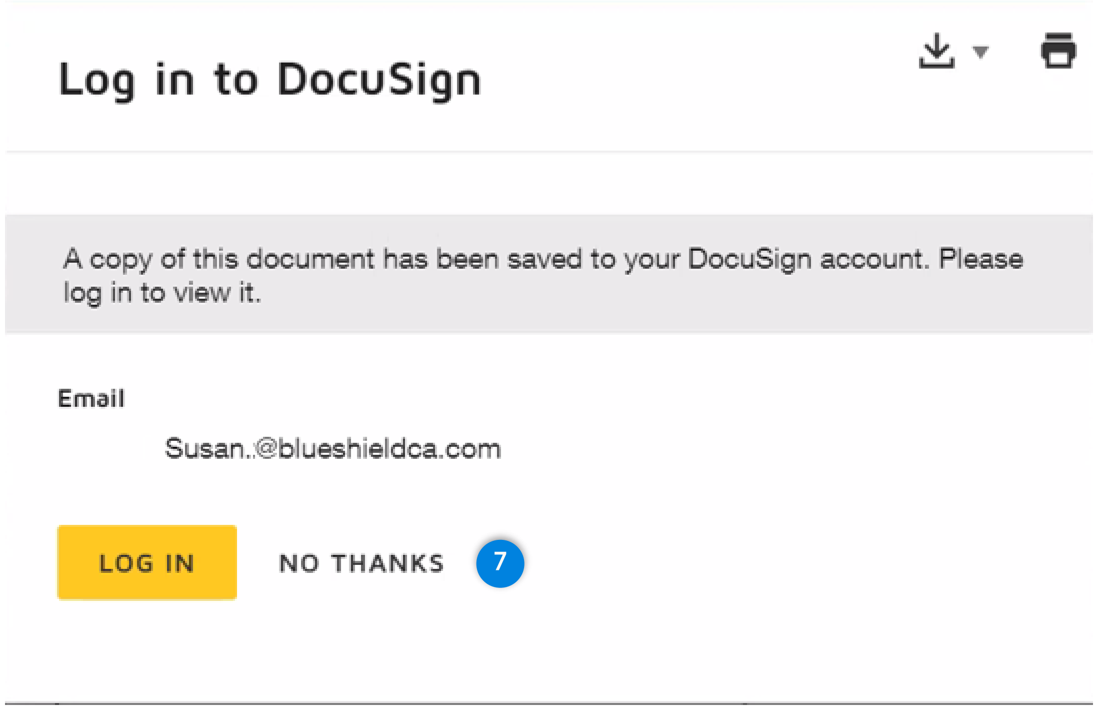
6. Click on "Sign"

The Prospect signature can use a system generated signature.

Note: The Today's Date field will prepopulate

Prospects Views and Actions

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



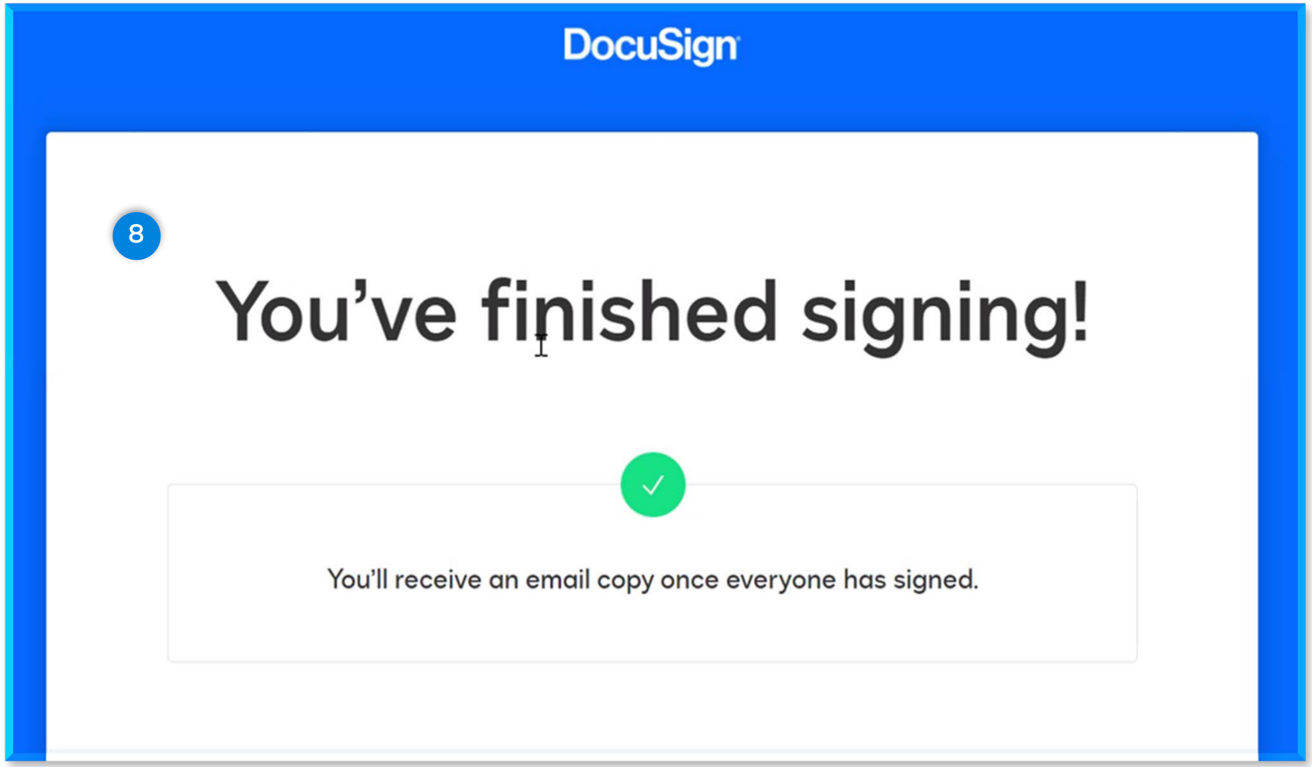
Steps

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

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

Prospects Views and Actions

One all steps have been completed the Prosect will "You've finished signing!" screen will display.

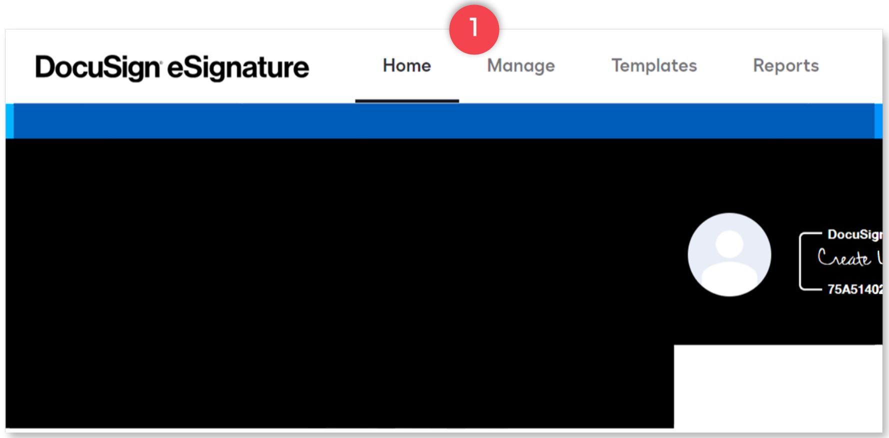


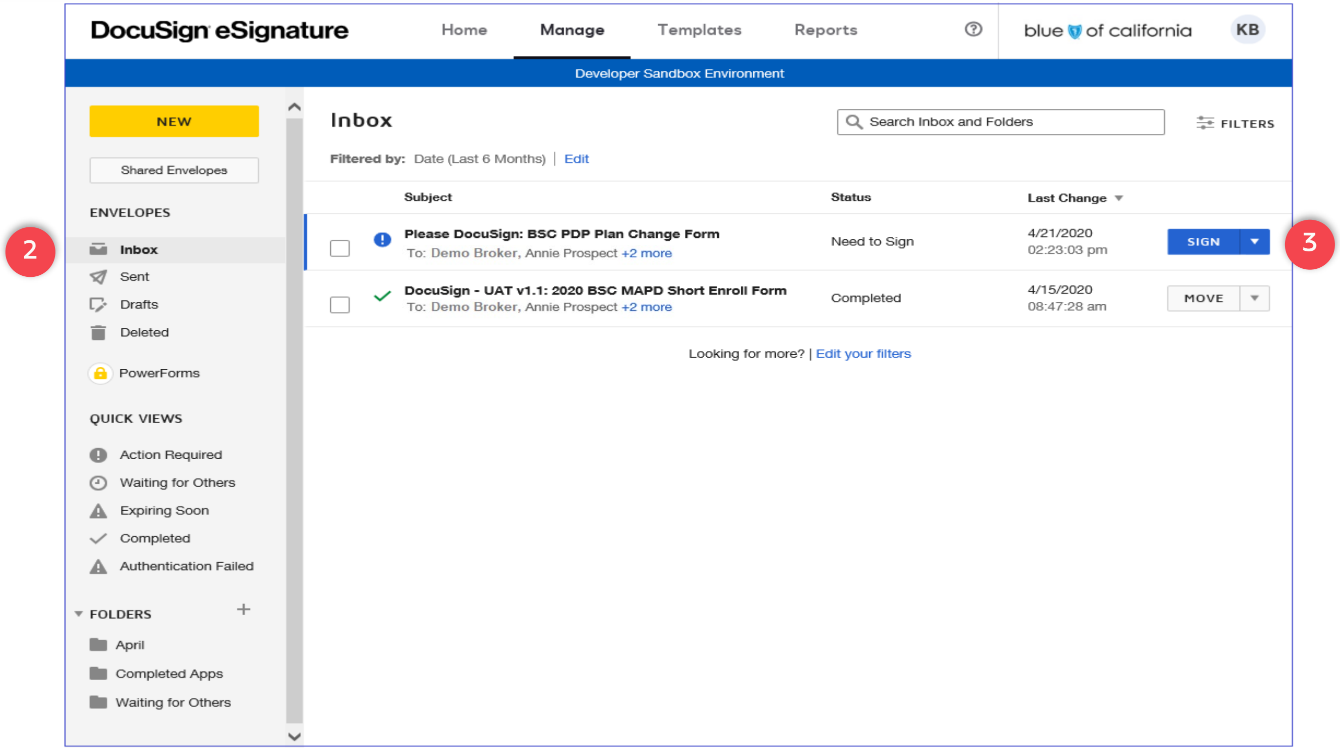
Steps

8. Once completed the Prospect will be greeted with the "You've Finished signing!" message.

Complete Application

Once the beneficiary signs the application, you will receive a notification that the application is ready for you to sign.





Steps

1. To access your inbox, click on the “Manage” tab located at the top of your screen.
2. Click the < Inbox > option on the left side panel.
3. Click the < Sign drop-down menu > to sign and finish the application.