



BlueCross BlueShield
of Texas

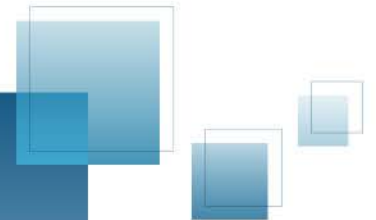
DocuSign Producer Training Guide

Effective February 2019

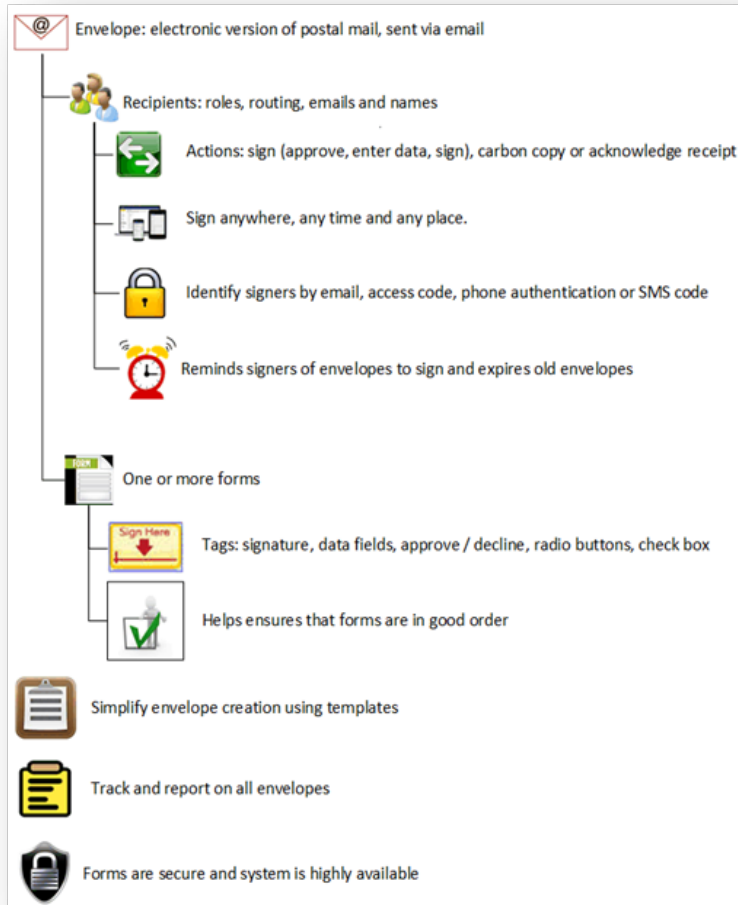


Training Agenda

- Concepts and Terminologies
- Accessing and Completing the PowerForm
- Complete and Sign DocuSign Envelope
- Signing Options
 - Finish Later
 - Decline to Sign
- Adopt a Signature



DocuSign Concepts and Terminologies



- **Envelope** - A DocuSign envelope is a container, used in sending one or more documents to recipient(s) for signature using the DocuSign system. Each document has multiple pages.
- **Tag** - A DocuSign tag is an interactive field. Tags can be placed on a document to indicate required fields or actions; a tag can prompt a signer to enter specific information, or initial in a particular location. Placing tags on a document guides the signer through the signing experience.
- **Reminder** - A reminder is an email notification sent to signer(s) automatically by the system. When reminders are enabled, you specify when and how often to send email notifications.
- **Expirations** - By default, all envelopes that are in process will expire if the recipient(s) does not complete the envelope. Expiration is configured at the account and can be overwritten at the envelope level. An option to send signers an expiration warning can be configured. When a document expires, the status changes to Voided and it can no longer be viewed or signed by recipients.
- **Template** - A DocuSign Template allows you to create a standard document, with set recipient roles, signing tabs and information fields. Templates can also contain the signing instructions for the document and any signature attachments. Templates help streamline the sending process when you frequently send the same or similar documents.
- **PowerForm** - Referred to as Web PowerForm, utilizes DocuSign Template and can be distributed via email or the web with a unique, secure URL automatically generated by the DocuSign system.

A decorative graphic in the top right corner consisting of several overlapping squares in various shades of blue and teal, some with white outlines.

Accessing and Completing the PowerForm

Accessing the PowerForms

The screenshot shows the 'blueaccess for Producers' portal. The top navigation bar includes 'Web Home', 'Employers', 'Producers', and 'Providers'. Below this is a secondary navigation bar with 'Home', 'Individual Products', 'Country Agency', 'Prospective Producer', 'Provider Finder', 'Prescription Drugs', and 'Contact Us'. A 'Log In' button is on the right. The main content area is titled 'Downloadable Forms for Regulated Small Business (2-50)'. It includes a sidebar with links to various form categories. The main text explains that regulated cases include employees with 50 or fewer total employees on average. Below this, a section titled 'New Business/Enrollment Forms' provides instructions on how to sign forms electronically. A table lists two forms: the '2019 Enrollment Package' and the '2019 Benefit Program Application (BPA)'. The table has columns for 'Form Name', 'Digital Form', and 'Download'.

Form Name	Digital Form	Download
2019 Enrollment Package – Includes Benefit Program Application (BPA) for New Small Groups 2-50, Employer Group Information (EGI) Form, and Artifacts Documentation	sign now	N/A
2019 Benefit Program Application (BPA) – for accounts effective 1/1/19 and after	sign now	download form

Accessing the PowerForm

Find the Form Name from the Blue Access for ProducersSM Portal

To electronically complete and sign the form, select **Sign Now**

Accessing the PowerForms

PowerForm Signer Information

Fill in the name and email for each signing role listed below. Signers will receive an email inviting them to sign this document.

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

Your Role:
Submitter

Your Name:

Your Email:

Please provide information for any other signers needed for this document.

Role:
Group

Name:

Email:

Role:
Producer

Name:

Email:

Role:
GA

Name:

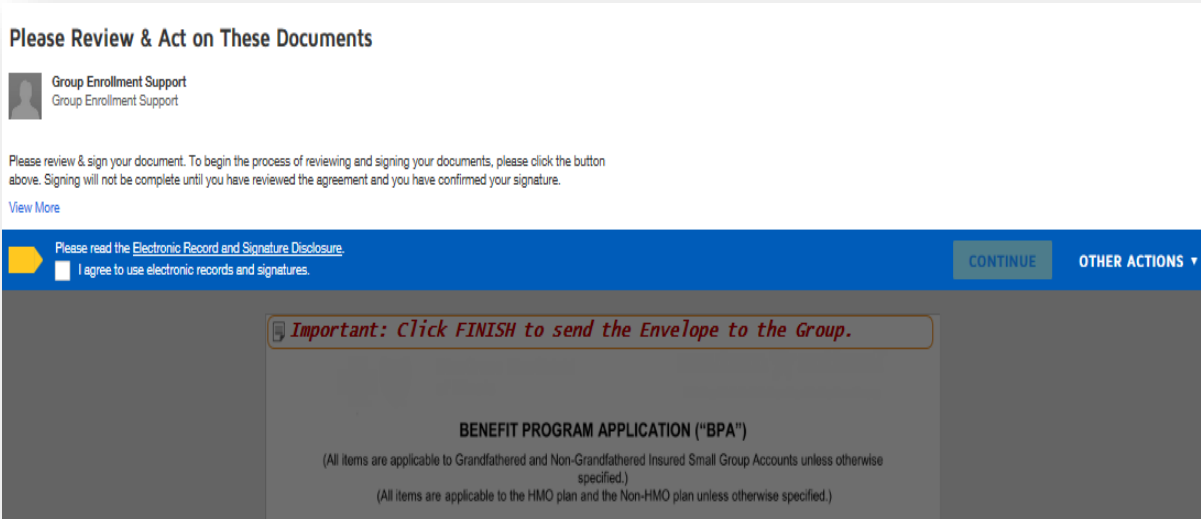
Email:

[Begin Signing](#)

➤ Entering Recipient's Information

- Enter the full name and e-mail address of the recipient(s) of the envelope.

Accessing the PowerForms



Please Review & Act on These Documents

Group Enrollment Support
Group Enrollment Support

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

[View More](#)

Please read the [Electronic Record and Signature Disclosure](#).

☐ I agree to use electronic records and signatures.

CONTINUE **OTHER ACTIONS ▼**

Important: Click FINISH to send the Envelope to the Group.

BENEFIT PROGRAM APPLICATION ("BPA")

(All items are applicable to Grandfathered and Non-Grandfathered Insured Small Group Accounts unless otherwise specified.)

(All items are applicable to the HMO plan and the Non-HMO plan unless otherwise specified.)

➤ Agree to Electronically Sign


- Review and agree to the **Electronic Records and Signature Disclosure**.
- Select **Continue** to start the signing process.


Completing the PowerForm

Please review the documents below.

FINISH OTHER ACTIONS ▾

START


**BlueCross BlueShield
of Texas**


Dearborn National
1001 E. Lookout Drive
Richardson, Texas 75082

**SMALL EMPLOYER BENEFIT PROGRAM APPLICATION
(Employer Application)**

(The following information only applies if selecting a Consumer Choice plan.)
You have the option to choose a Consumer Choice of Benefits Health Maintenance Organization (HMO) health care plan that, either in whole or in part, does not provide state-mandated health benefits normally required in evidences of coverage in Texas. This standard health benefit plan may provide a more affordable health plan for you although, at the same time, it may provide you with fewer health plan benefits than those normally included as state-mandated health benefits in Texas. If you choose this standard health benefit plan, please consult with your insurance agent to discover which state-mandated health benefits are excluded in this evidence of coverage (Certificate of Coverage).

Application is hereby made to Blue Cross and Blue Shield of Texas (BCBSTX) and/or Dearborn National® Life Insurance Company ("Dearborn National").

Legal Name of Company: _____

Employer Identification Number (EIN): _____ Nature of Business: _____ Standard Industry Code (SIC): _____

Physical Address (number & street), City, State, ZIP: _____ Telephone Number: _____ TX _____

E-Mail Address of Authorized Company Official: _____ FAX Number: _____

Secondary E-Mail Address, if different from Authorized Company Official: _____ FAX Number: _____

Complete Mailing Address, if different from physical address: _____

Billing and Correspondence to the attention of: _____

Billing Method Selection:
Please select one of the following billing methods.
(If no selection is made, your benefit plan(s) will default with their current billing method)
☐ Composite Billing
☐ Age Billing

The Blue Access for Employers (BAE) contact person is the individual authorized by the Employer to access and maintain its account/employee information.
Name and title of the BAE contact person: _____

E-mail address of BAE contact person: _____

Proprietary and Confidential Information of Blue Cross and Blue Shield of Texas. Not for use or disclosure outside Blue Cross and Blue Shield of Texas.
Employer, their respective affiliated companies and third party representatives, except with written permission of Blue Cross and Blue Shield of Texas.
Blue Cross and Blue Shield of Texas, a Division of Health Care Service Corporation, a Mutual Legal Reserve Company,
an Independent Licensee of the Blue Cross and Blue Shield Association
*Products and services marketed under the Dearborn National® brand and the star logo are underwritten and/or provided
by Dearborn National® Life Insurance Company (Downers Grove, IL) in all states (excluding New York), the District of Columbia,
the United States Virgin Islands, the British Virgin Islands, Guam and Puerto Rico.
Dearborn National® Life Insurance Company does not provide Blue Cross and Blue Shield of Texas products and services, and is a separate company.

TXBPASG-OFF-EX06.18 Page 1
DocuSign Envelope ID: 85AA1087-2804-4096-9FF4-31A0A06F20D3

➤ PowerForm Completion

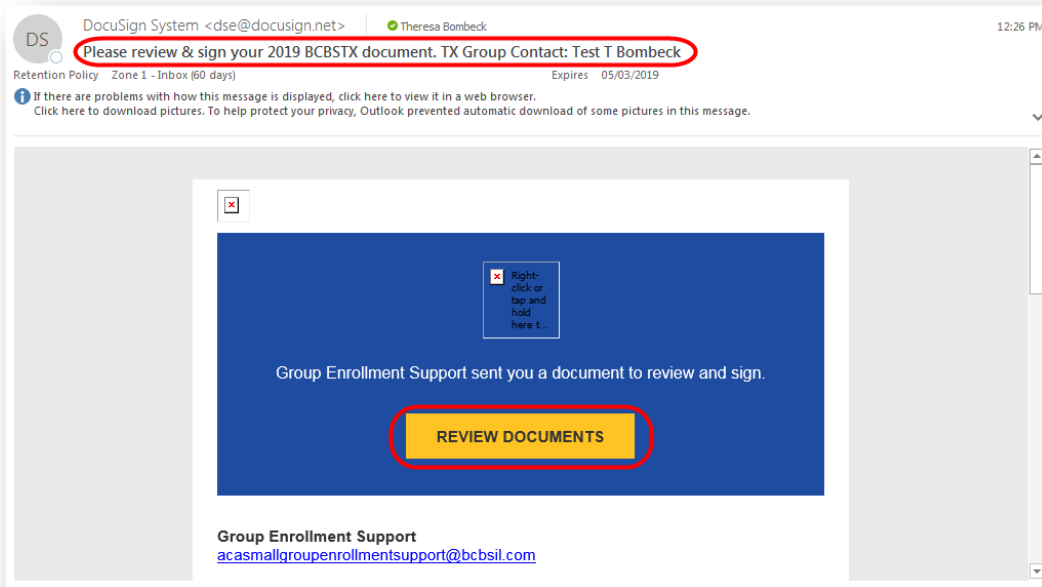
- Enter the required information on every form, sign when appropriate and select **FINISH** to complete the form and send the DocuSign paperwork to the Group.

Note: If **FINISH** button is not clicked and "X" is clicked to close then the DocuSign paperwork will not move forward to the Group and a new PowerForm will need to be submitted again.

Complete and Sign DocuSign Envelope

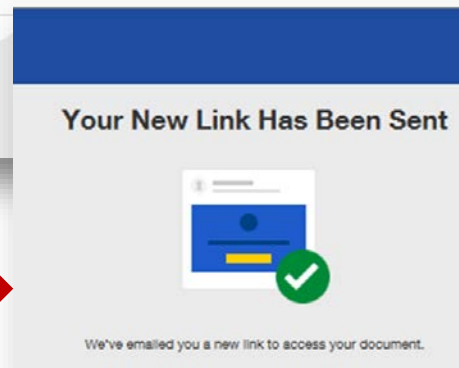
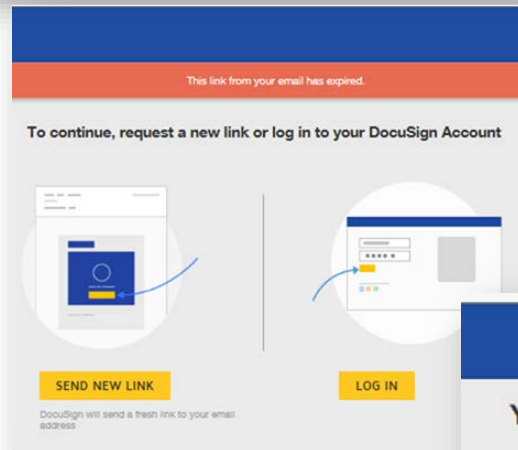
➤ Complete and Sign DocuSign Envelope

- When DocuSign e-mail is received from DocuSign, click on **REVIEW DOCUMENTS** to display DocuSign Documents.
- Complete filling out information.
- Select **FINISH LATER** to save entered information and return at a later time.
- If the DocuSign envelope is no longer needed, **DECLINE TO SIGN**.



Note: The **REVIEW DOCUMENTS** link will expire within 48 hours or five clicks and a new DocuSign email with a new link will be systematically sent by DocuSign.

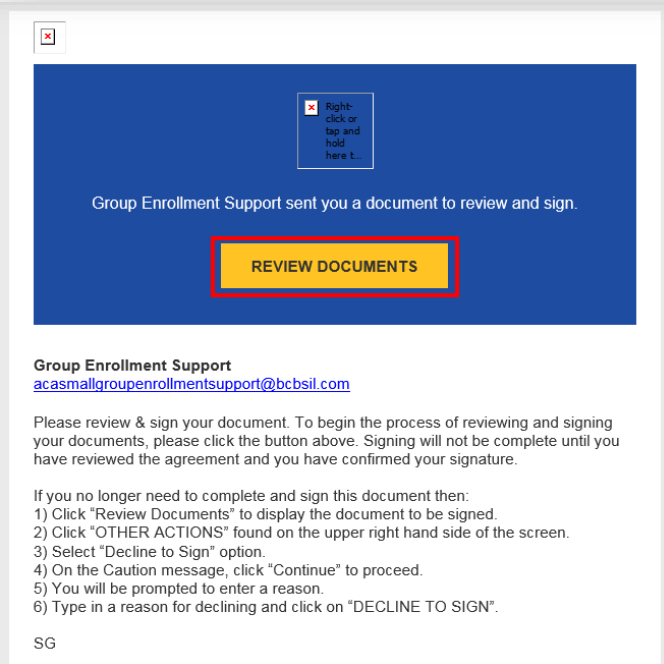
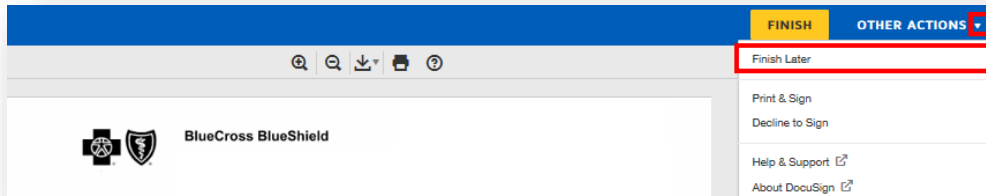
DocuSign Review Documents Link Expires



➤ Review Documents Link Expires

- URL link expires after 48 hours of being sent or after it has been clicked five times.
- When the **REVIEW DOCUMENTS** link is clicked and the link has expired, a message will be displayed indicating *"The link from your email has expired."*
- A new link can be sent, by clicking the **SEND NEW LINK** button. A message will display that lets the user know a new link has been sent.
- DocuSign will send a new e-mail systematically with a new **REVIEW DOCUMENTS** link.
- Click **REVIEW DOCUMENTS** link from the new e-mail to access the DocuSign Documents.

Signing Option “Finish Later”

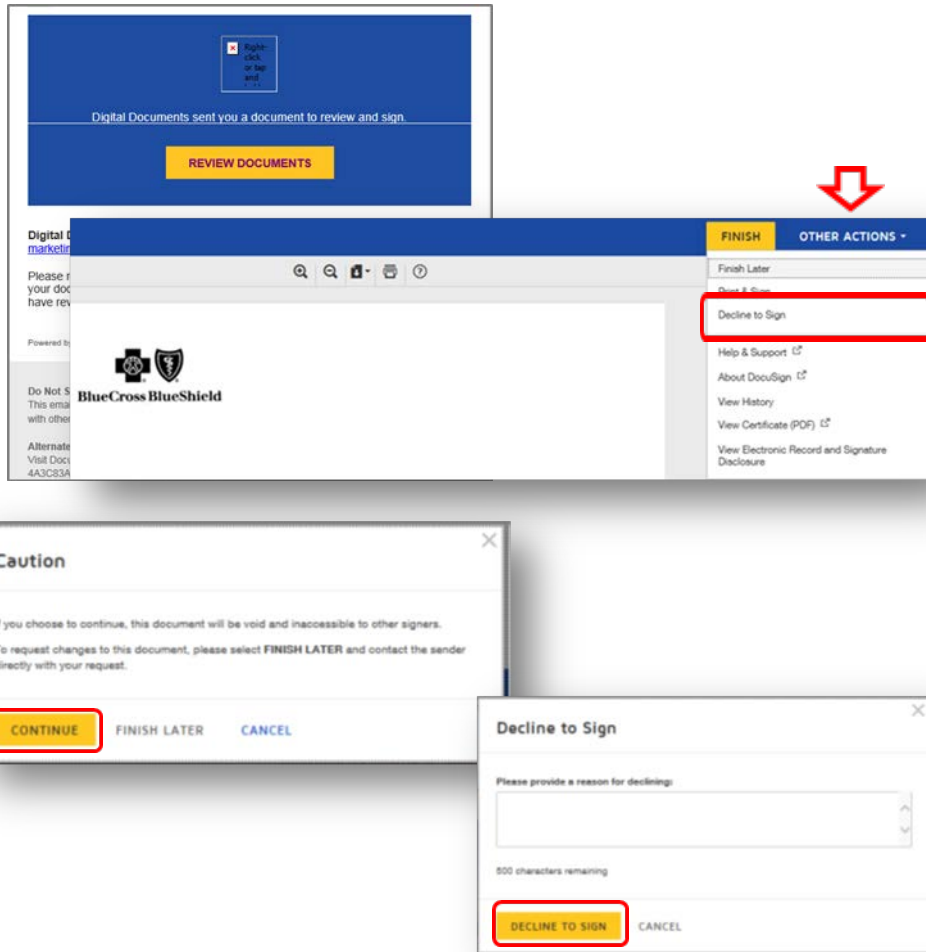


➤ Finish Later

- Click on the **OTHER ACTIONS** dropdown.
- Select **Finish Later** to save the document and complete the form, at a later time.
- Reopen the document from the DocuSign e-mail, by clicking on the **REVIEW DOCUMENTS** BUTTON.
- Continue completing and signing the document.

Note: DocuSign system will send a reminder e-mail if the envelope is incomplete. Envelope will be systematically voided if not signed by all parties within 30 days.

Signing Option “Decline to Sign”

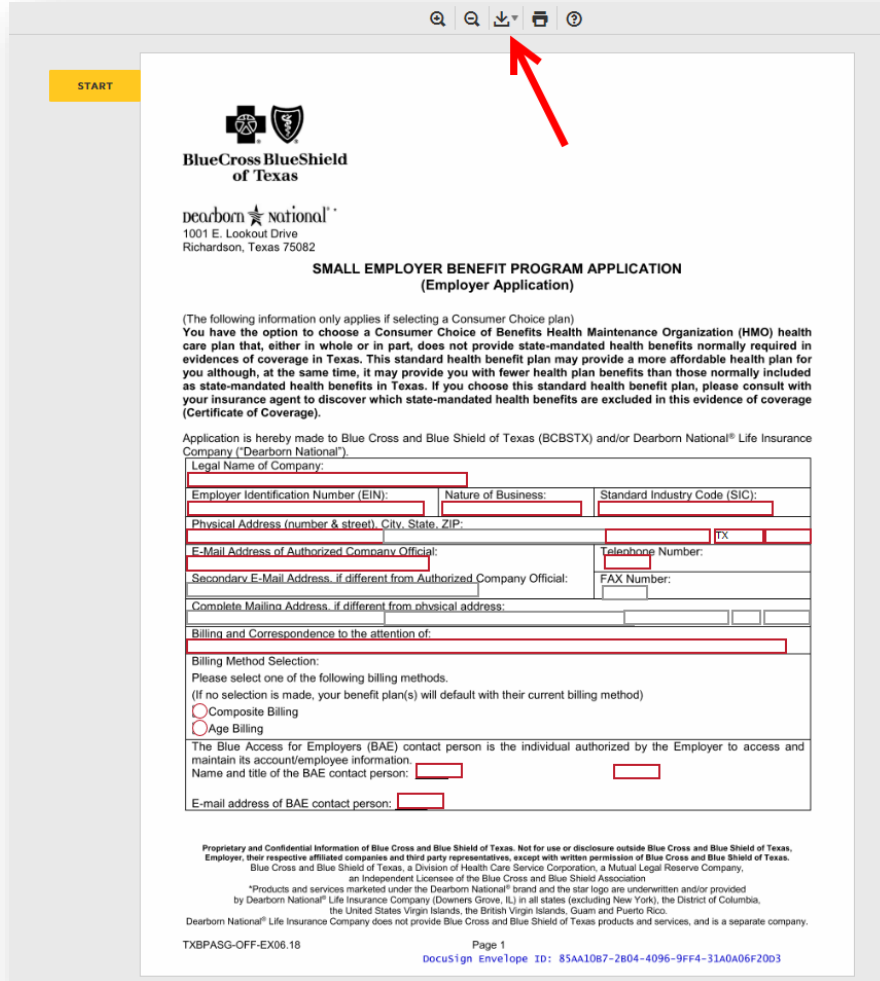


➤ Decline to Sign

If a DocuSign document no longer needs to be completed and signed, user should select the ‘Decline to Sign’ option, from the dropdown.

- Reopen the document from the DocuSign e-mail by clicking on **REVIEW DOCUMENTS**.
- Click the **OTHER ACTTIONS** dropdown.
- Select **DECLINE TO SIGN**.
- A ‘Caution’ message will display, proceed by clicking on **CONTINUE**.
- ‘Decline to Sign’ message displays, with text box. User should explain reason for declining to sign the document, in the text box.
- Finally click **DECLINE TO SIGN**.

Envelope Completion and Sending to BCBS



BlueCross BlueShield of Texas

Dearborn National
1001 E. Lookout Drive
Richardson, Texas 75082

SMALL EMPLOYER BENEFIT PROGRAM APPLICATION
(Employer Application)

(The following information only applies if selecting a Consumer Choice plan)
You have the option to choose a Consumer Choice of Benefits Health Maintenance Organization (HMO) health care plan that, either in whole or in part, does not provide state-mandated health benefits normally required in evidences of coverage in Texas. This standard health benefit plan may provide a more affordable health plan for you although, at the same time, it may provide you with fewer health plan benefits than those normally included as state-mandated health benefits in Texas. If you choose this standard health benefit plan, please consult with your insurance agent to discover which state-mandated health benefits are excluded in this evidence of coverage (Certificate of Coverage).

Application is hereby made to Blue Cross and Blue Shield of Texas (BCBSTX) and/or Dearborn National® Life Insurance Company ("Dearborn National").

Legal Name of Company: _____

Employer Identification Number (EIN): _____ Nature of Business: _____ Standard Industry Code (SIC): _____

Physical Address (number & street), City, State, ZIP: _____ TX _____

E-Mail Address of Authorized Company Official: _____ Telephone Number: _____

Secondary E-Mail Address, if different from Authorized Company Official: _____ FAX Number: _____

Complete Mailing Address, if different from physical address: _____

Billing and Correspondence to the attention of: _____

Billing Method Selection:
Please select one of the following billing methods.
(If no selection is made, your benefit plan(s) will default with their current billing method)
☐ Composite Billing
☐ Age Billing

The Blue Access for Employers (BAE) contact person is the individual authorized by the Employer to access and maintain its account/employee information.
Name and title of the BAE contact person: _____

E-mail address of BAE contact person: _____

Proprietary and Confidential Information of Blue Cross and Blue Shield of Texas. Not for use or disclosure outside Blue Cross and Blue Shield of Texas, Employer, their respective affiliated companies and third party representatives, except with written permission of Blue Cross and Blue Shield of Texas. Blue Cross and Blue Shield of Texas, a Division of Health Care Service Corporation, a Mutual Legal Reserve Company, an Independent Licensee of the Blue Cross and Blue Shield Association

*Products and services marketed under the Dearborn National® brand and the star logo are underwritten and/or provided by Dearborn National® Life Insurance Company (Downers Grove, IL) in all states (excluding New York), the District of Columbia, the United States Virgin Islands, the British Virgin Islands, Guam and Puerto Rico.

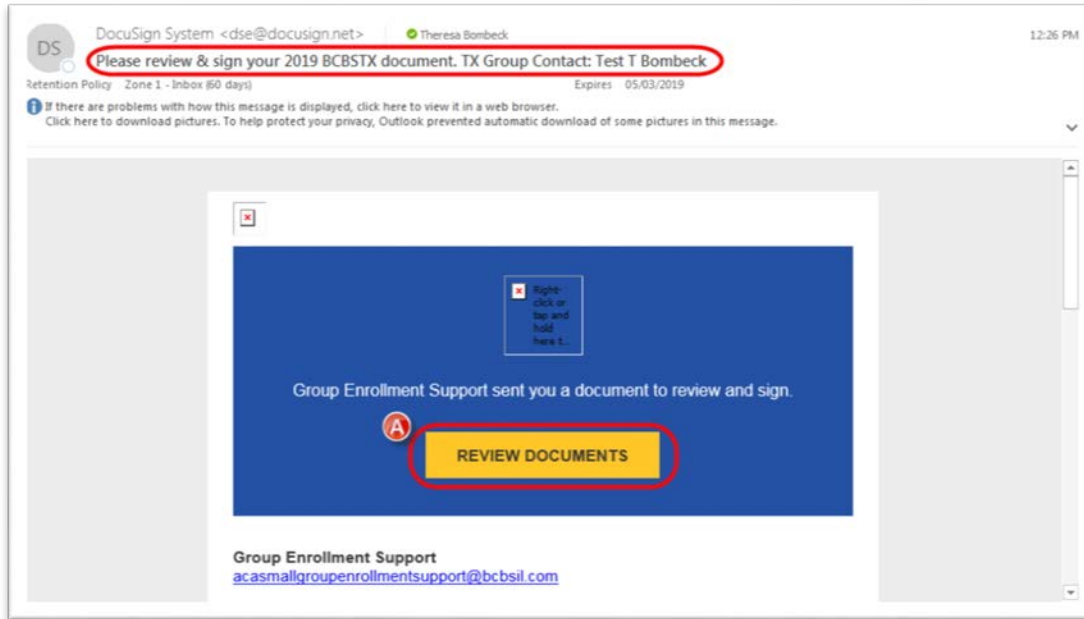
Dearborn National® Life Insurance Company does not provide Blue Cross and Blue Shield of Texas products and services, and is a separate company.

TXBPASG-OFF-EX06.18 Page 1
DocuSign Envelope ID: 85AA1067-2B04-4096-9FF4-31A0A06F2D03


➤ Envelope Completion

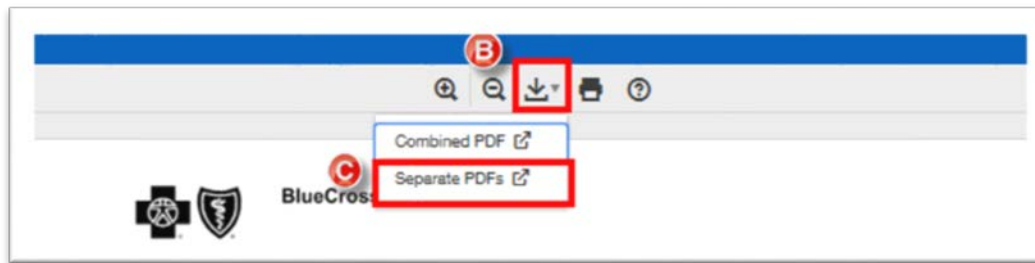
- DocuSign will send **Completed** email to all the signers.
- User will need to **click VIEW DOCUMENTS** AND download a PDF version of the completed DocuSign document (Please see red arrow).
- User will then submit to Blue Cross and Blue Shield (BCBS), following their current process.

Envelope Completion and Sending to BCBS



➤ Download Completed and Signed DocuSign Document

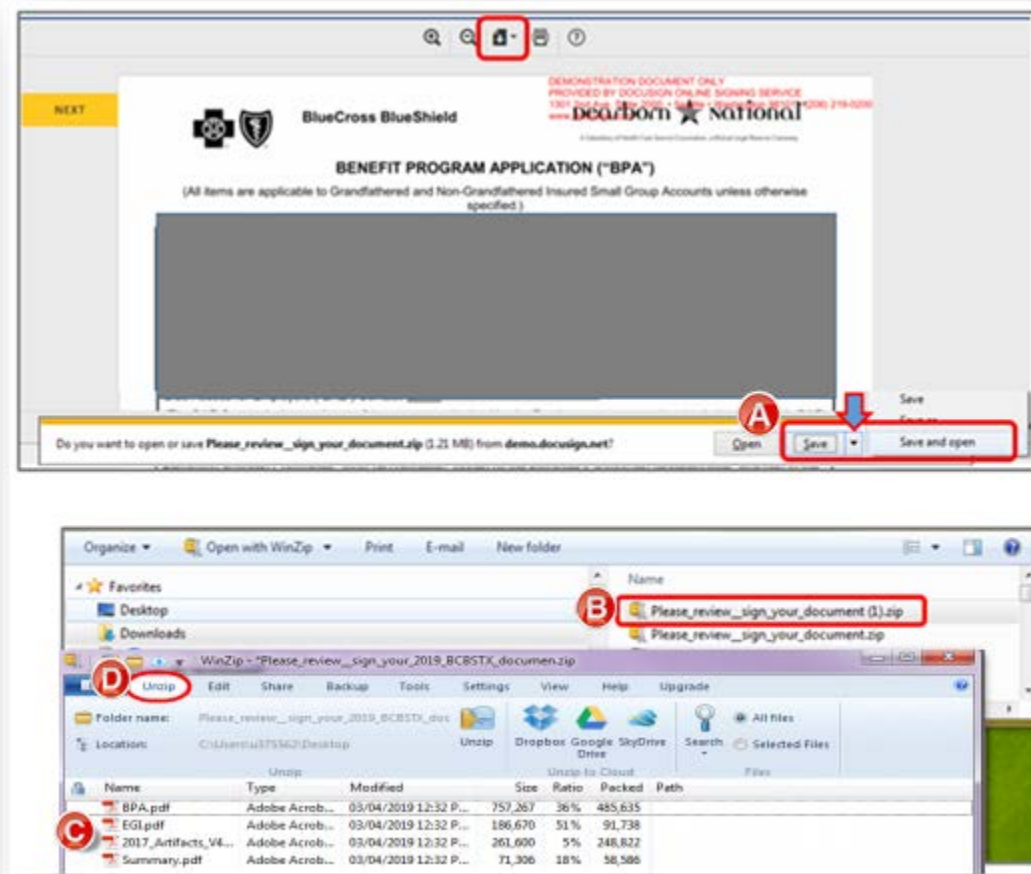
- When completed e-mail is received from DocuSign, click on **REVIEW DOCUMENTS** to display DocuSign Documents.
- From the DocuSign Document click the down arrow icon (), to download PDFs.
- Select 'Separate PDFs' so that each individual PDF can be attached in the Enrolment Tool.



Envelope Completion and Sending to BCBS

➤ Download Completed and Signed DocuSign Document

- Click on the down arrow, by the **Save** button and select **Save and Open** from the dropdown list.
- The DocuSign Documents download as a zip file.
- The File Manager displays the PDFs within the downloaded zip file.
- Unzip the downloaded zip file and save in an existing folder or create a new folder and then save the document.



“In Process” DocuSign Document

2003 10 17

vered are listed above, a separate "Addendum to the Ben
must be completed, signed by the Employer's authorized
olicy.)

Phone: 6304584568 Fax: na

E) Contact: jo jo

ie of the account authorized by the Employer to access a

Phone: 6304587859 Fax: 63045878

Policy Anniversary Date: / /
Mar 1st 2017

Security Act of 1974 (ERISA) is a federal law that sets minin
general, all employer groups, insured or ASO, are subje
icipalities and public school districts, and "church plans" as defi

t: Yes ☐ No ☒

eginning Date: N/A / / End Date: N/A / / (month/day)

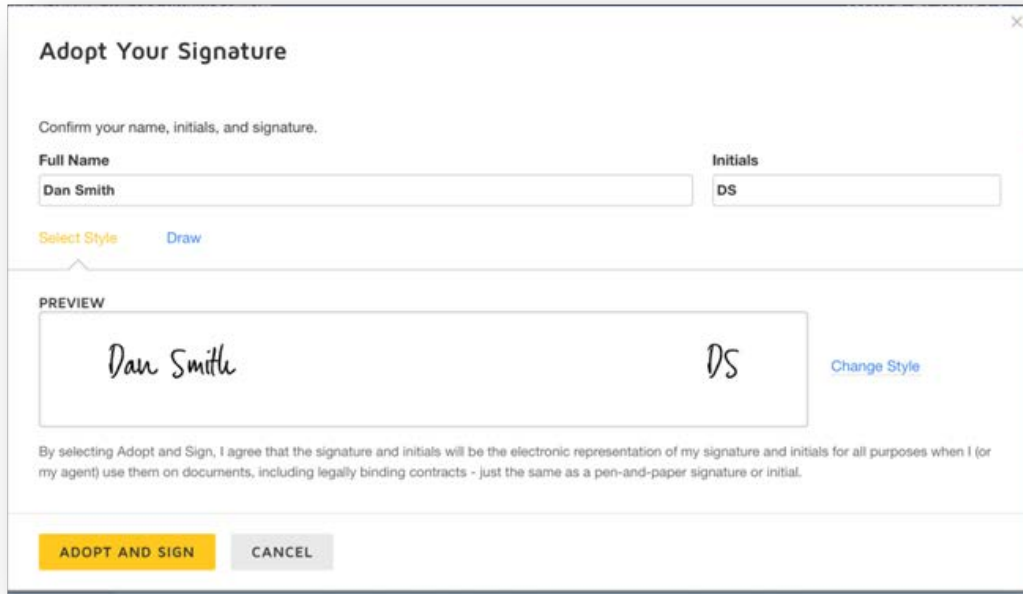
➤ “In Process” – DocuSign Document

- In case a DocuSign PDF is downloaded, prior to being completed and signed, there will be an **“In Process”** watermark displayed, diagonally on the center of the page.
- **“In Process”** DocuSign PDFs should not be attached in the Enrollment Tool.
- The **“In Process”** watermark will not display on signed and completed DocuSign PDFs.

A decorative graphic in the top right corner consisting of several overlapping squares in various shades of blue and teal, some with white outlines.

Adopt a Signature

Adopt a Signature



The screenshot shows a pop-up window titled "Adopt Your Signature" with a close button (X) in the top right corner. Inside the window, there is a section titled "Confirm your name, initials, and signature." Below this, there are two input fields: "Full Name" containing "Dan Smith" and "Initials" containing "DS". Below these fields are two links: "Select Style" (highlighted in yellow) and "Draw" (in blue). A "PREVIEW" section below shows a stylized signature "Dan Smith" and initials "DS" in a cursive font. To the right of the preview is a "Change Style" link. Below the preview is a legal disclaimer: "By selecting Adopt and Sign, I agree that the signature and initials will be the electronic representation of my signature and initials for all purposes when I (or my agent) use them on documents, including legally binding contracts - just the same as a pen-and-paper signature or initial." At the bottom of the window are two buttons: "ADOPT AND SIGN" (highlighted in yellow) and "CANCEL" (in grey).

➤ Adopting Your Signature

- After Selecting the **SIGN** tag, signer will be presented with an “Adopt Your Signature” pop-up window, to adopt a signature.
- Select the **ADOPT AND SIGN** button, to adopt and save your signature information.

Adopt a Signature

Adopt Your Signature

Confirm your name, initials, and signature.

Full Name
Dan Smith

[Select Style](#) [Draw](#)

PREVIEW

Dan Smith

By selecting Adopt and Sign, I agree that the signature and initials will be the elec
my agent) use them on documents, including legally binding contracts - just the s

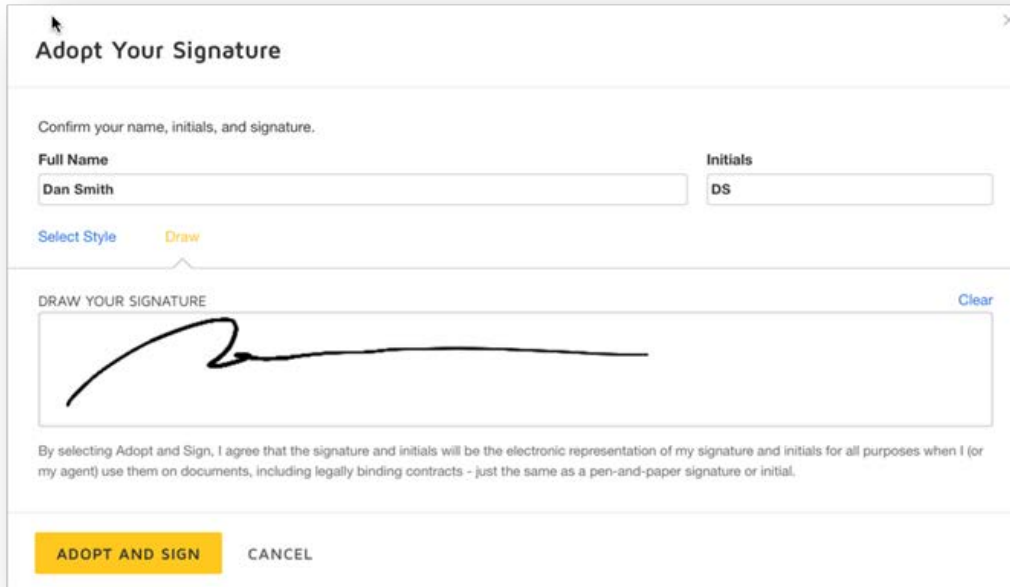
ADOPT AND SIGN **CANCEL**

Dan Smith	DS
Dan Smith	DS
Dan Smith	DS
Dan Smith	DS

➤ Selecting Signature Style

- Select **Style Type** to select from pre-defined signature layouts.
- Select **Adopt and Sign** to adopt the signature style.

Adopt a Signature



The screenshot shows a 'Adopt Your Signature' dialog box. At the top, it says 'Adopt Your Signature' with a close button. Below that, it prompts the user to 'Confirm your name, initials, and signature.' There are two input fields: 'Full Name' with the text 'Dan Smith' and 'Initials' with the text 'DS'. Below these fields are two buttons: 'Select Style' (blue) and 'Draw' (yellow). The 'Draw' button is selected. Below the buttons is a section titled 'DRAW YOUR SIGNATURE' with a 'Clear' button. Inside this section is a large rectangular box containing a handwritten signature. Below the box is a disclaimer: 'By selecting Adopt and Sign, I agree that the signature and initials will be the electronic representation of my signature and initials for all purposes when I (or my agent) use them on documents, including legally binding contracts - just the same as a pen-and-paper signature or initial.' At the bottom are two buttons: 'ADOPT AND SIGN' (yellow) and 'CANCEL' (grey).

➤ Drawing Your Signature

- Select **Draw** to draw your desired signature in the box.
- Select **Adopt and Sign** to adopt the drawn signature.

Four squares of varying sizes and shades of blue are arranged in a cluster in the top right corner of the slide. They have a slight drop shadow effect.

**For additional information please see the
Group, Training & Admin section on Blue
Access for ProducersSM.**



BlueCross BlueShield of Texas

A Division of Health Care Service Corporation, a Mutual Legal Reserve Company,
an Independent Licensee of the Blue Cross and Blue Shield Association