MIBS
Midwest Insurance
Brokerage Service, Inc.

Midwest Insurance

Brokerage Service Inc.

Docu*Sign* Guide

3/21/2018

Docu*Sign* Guide

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Streamline your BCBS IL group enrollment
With Docu*S**ign*

DocuSign emails the group enrollment package to your client, where they will electronically fill out and sign the appropriate documents. DocuSign then automatically emails the agent the completed and signed forms for the agent's electronic signature. No more handwritten forms being scanned, emailed or faxed. No more missing information or forgotten forms. Agents using DocuSign will save time and see a faster turnaround time on their group submissions.
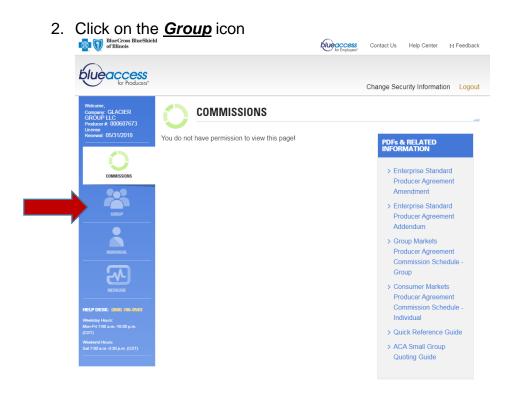
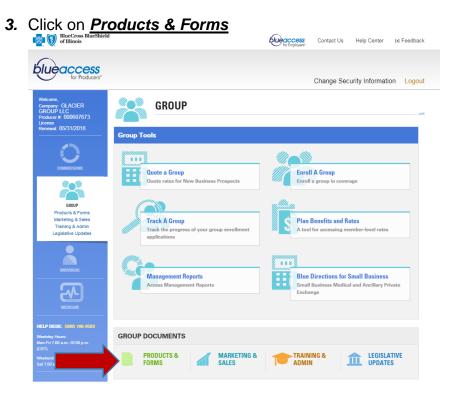Agents interested in additional hands on training, please contact Patty Kretschmar at patty@midwestga.com.

Benefits:

- Streamline & securely complete group level paperwork & employee applications
- DocuSign can be completed anytime, anywhere on any device
- Improved accuracy & legibility of documents
- Faster turnaround time for group submissions

How it works:

1. Log into Blue Access for Producers at bcbsil.com.

2. Click on the **_Group_** icon

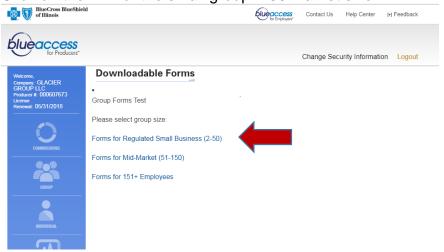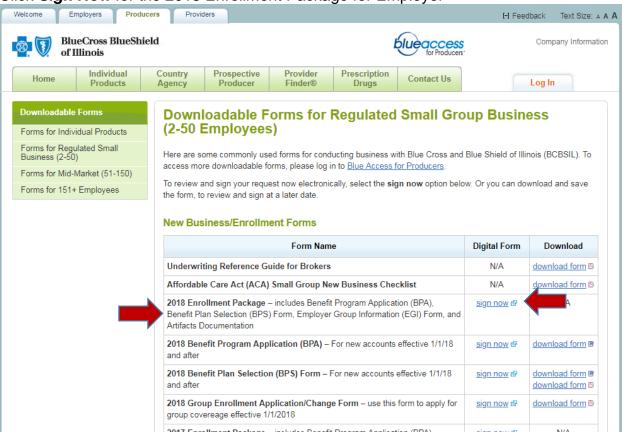_3._ Click on **_Products & Forms_**

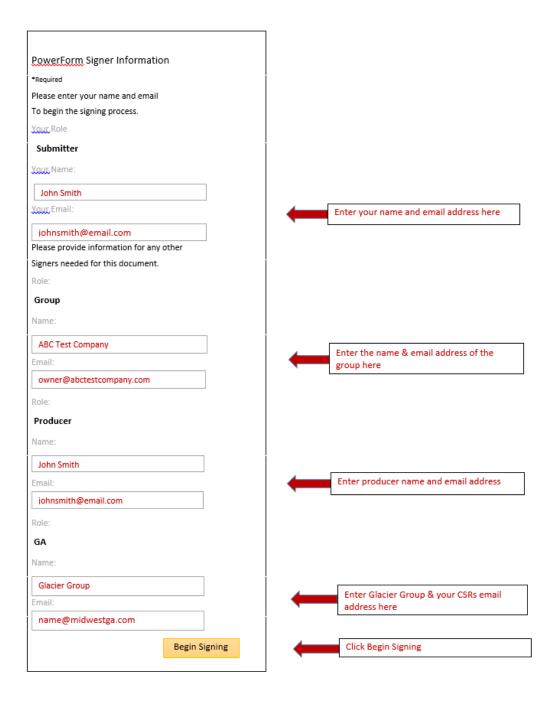4. Under Group Tools, click on ***Downloadable Forms***

5. Click on the link for the small group 2-50 market size

6. Click *Sign Now* for the 2018 Enrollment Package for Employer

7. Complete the PowerForm Information page

PowerForm Signer Information

*Required

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

Your Role

Submitter

Your Name:

John Smith

Your Email:

johnsmith@email.com

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

Role:

Group

Name:

ABC Test Company

Email:

owner@abctestcompany.com

Role:

Producer

Name:

John Smith

Email:

johnsmith@email.com

Role:

GA

Name:

Glacier Group

Email:

name@midwestga.com

Begin Signing

Enter your name and email address here

Enter the name & email address of the group here

Enter producer name and email address

Enter Glacier Group & your CSRs email address here

Click Begin Signing

8. The producer or submitter will check off that they agree to use electronic records and signatures which will allow them to click the *CONTINUE* button.

9. The actual enrollment or application documents will appear and the agent has the option to enter in any information he has for the group and then click *FINISH*.

The enrollment envelope has been created and emailed to the group for the next step.
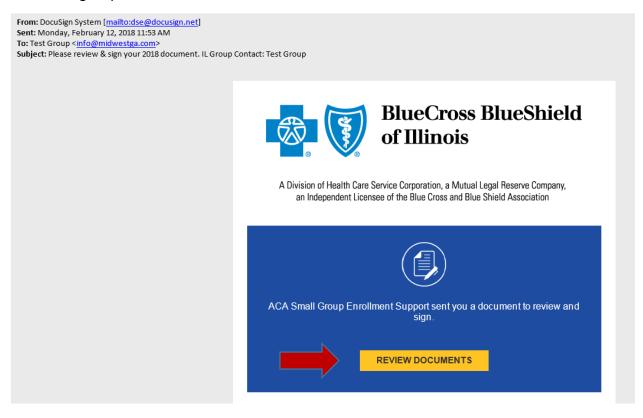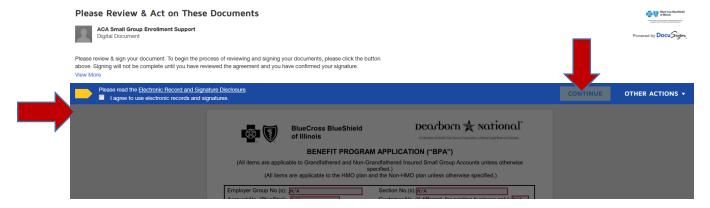

The group will now receive an email from: DocuSign System –

[mailto:dse@docusign.net].

subject line: Please review & sign your 2018 document. IL Group Contact: name

1. The group will click on the *REVIEW DOCUMENTS* button.

From: DocuSign System [mailto:dse@docusign.net]
Sent: Monday, February 12, 2018 11:53 AM
To: Test Group <info@midwestga.com>
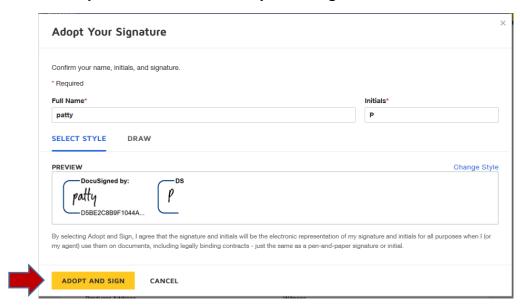Subject: Please review & sign your 2018 document. IL Group Contact: Test Group

2. The group will check off that they agree to use electronic records and signatures which will allow them to click the *CONTINUE* button.

3. The group will enter the required information into all data fields outlined in red for all documents.

4. At the end of each document, the employer will be able to electronically sign by clicking on the gold Sign icon:

Producer Agency Representative	Sign → Signature of Employer/Authorized Purchaser
	owner
Signature of Producer Agency Representative	Title
	3/21/2018
Producer Agency Name	Date
Producer Address	Witness
Producer Phone No.	
Producer Number	
Contracted Producer Tax ID No.	$ _____ mount Submitted (for initial enrollment only)
HCSC Sales Representative District / Cluster	Other Information: _____

UNDERWRITING AUTHORIZATION			
INTERNAL USE ONLY	Benefit program and premium notification letter included: ◯ Yes	◯ No	Date of Letter: _____

5. A pop up will appear allowing where you can adopt your signature.   Confirm name is spelled correctly and then click the **Adopt and Sign** button.
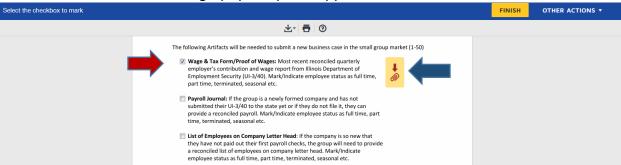

As the employer continues to move through the remaining documents, they will be able to electronically sign each document by clicking on the gold *Sign* button.

The last two pages of the group enrollments packet will be the list of artifacts that can be uploaded.

1. Wage & Tax form
2. Payroll journal
3. List of employees on company letter head
4. Articles of incorporation/EIN form
5. Full time status certification for owners, partners, proprietors
6. Owners/certification FT form/Partners K1
7. IL 1065 Partnership K1 for husband wife group
8. PEO letter
9. Prior carrier bill
10. Collective bargaining agreement
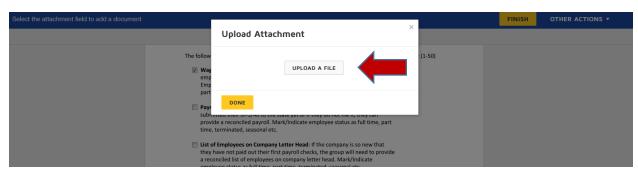11. Binder check
12. Routing sheet

6. For those attachments that are required for you group, click on the box before the attachment title and an orange paperclip will appear.
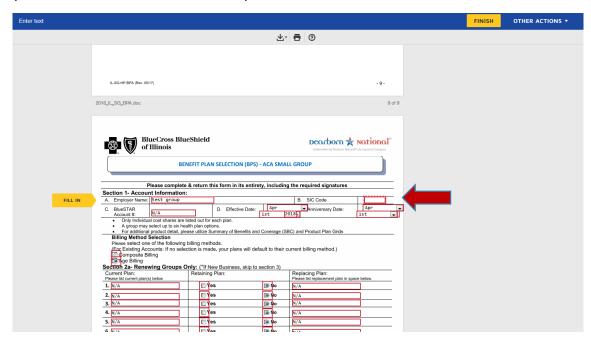

In the example above, the box checked, is the Wage and Tax. (red arrow) This is where you would upload the Quarterly Wage and Tax. Check the next box that matches the next document and upload until all documents have been uploaded.

Click on the orange paperclip (blue arrow) and a pop up will appear allowing the group to upload the selected document.

6. The group will click on *UPLOAD A FILE* and they will select the saved document from their computer and click *OPEN*.   For each additional required document that needs to be attached, the group will check the box for the specific document and upload until all documents have been uploaded.   Then click *DONE.*

7. If anything is missing, the system will automatically take you to the field with the missing information for completion. The **FINISH** button will not become available until all required data fields have been completed.
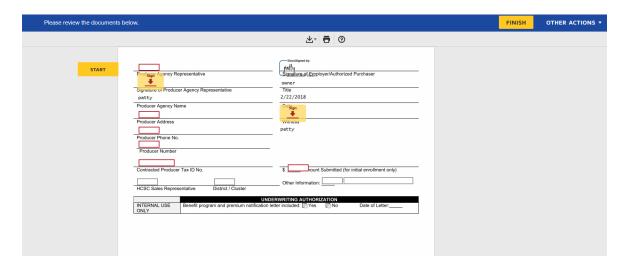

All empty red boxes need to have something entered. You can enter NA if not applicable. When all field are entered, the finish button will process. Click on the **FINISH** button.

An email, similar to the one the group received, will be sent to the agent for agent's information and signature.

1. Agent will click on **REVIEW DOCUMENTS**.
2. The documents will open and the agent will need to check the box to agree to use electronic records and signature and then click **CONTINUE**.
3. The documents the group completed will open and the producer can review but not edit.
4. The producer will go to the last page of the BPA and enter their agent information and electronically sign by clicking on the two gold tabs.   Make sure the producer's BCBS ID number is 9 digits. If needed, use leading zeroes to make 9 digits.

13. The agent will complete the Adopt your Signature and click **ADOPT AND SIGN**.   This will be done twice, one for each gold tab.
14. The agent will scroll through all of the documents until they reach the bottom and click **FINISH**.
15. You are done.

Once MIBS signs as well, Docusign will automatically send the completed documents to:
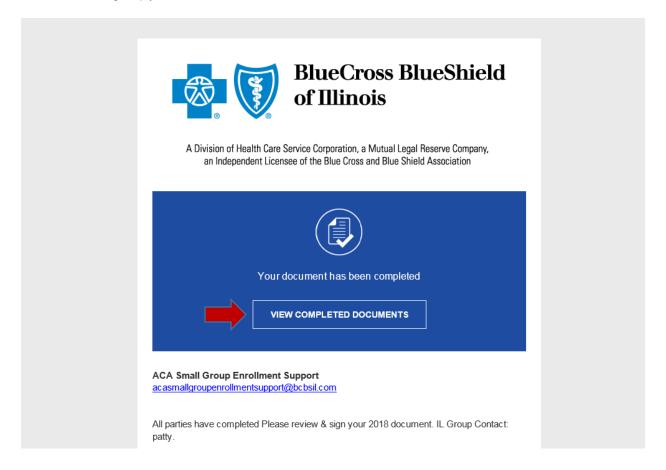
The Group

The Agent

The GA

DocuSign System <dse@docusign.net>

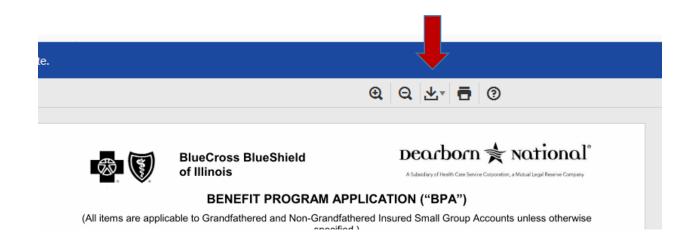Completed: Please review & sign your 2018 document. IL Group Contact: patty

up

oblems with how this message is displayed, click here to view it in a web browser.

BlueCross BlueShield of Illinois

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

Your document has been completed

VIEW COMPLETED DOCUMENTS

ACA Small Group Enrollment Support
acasmallgroupenrollmentsupport@bcbsil.com

All parties have completed Please review & sign your 2018 document. IL Group Contact:
patty.

Click on *VIEW COMPLETED DOCUMENTS* to open.

You can download the documents for your records by clicking on the download icon. A larger view is seen in the second screen shot. *Remember, you do not need to send these forms to your CSR at MIBS as we will automatically receive it after the agent finishes.*

A pop up will appear offering two download options:

Combined PDF

Separate PDF

Click on the option you want.

Follow the directions of the pop screen to download.

If electing separate PDFs, a zip file will open showing separate PDFs to open and save or print.

If electing combined PDF, the system will create one PDF document to save or print.

If you have any questions or need to make any changes to the documents, please contact your MIBS customer service rep. for assistance.

Docusign and Employee Applications

Employee applications can be collected in the following ways:

Employee applications (for initial enrollment and new hires) are necessary to document the employee selections of members enrolling and plan selection or waiver with reason. All applications should be signed and dated.

1. The agent can use DocuSign to send the employee application to each individual employee using a separate *PowerForm* for each employee. You will need the name of the employee as well as the email address for each employee.

Downloadable Forms for Regulated Small Group Business (2-50 Employees)

Here are some commonly used forms for conducting business with Blue Cross and Blue Shield of Illinois (BCBSIL). To access more downloadable forms, please log in to Blue Access for Producers.

To review and sign your request now electronically, select the **sign now** option below. Or you can download and save the form, to review and sign at a later date.

New Business/Enrollment Forms

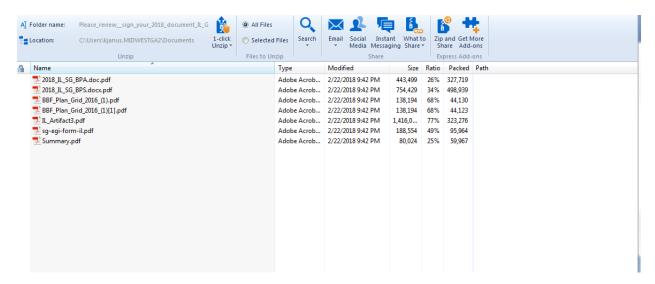| Form Name	Digital Form	Download
Underwriting Reference Guide for Brokers	N/A	download form
Affordable Care Act (ACA) Small Group New Business Checklist	N/A	download form
2018 Enrollment Package – includes Benefit Program Application (BPA), Benefit Plan Selection (BPS) Form, Employer Group Information (EGI) Form, and Artifacts Documentation	sign now	N/A
2018 Benefit Program Application (BPA) – For new accounts effective 1/1/18 and after	sign now	download form
2018 Benefit Plan Selection (BPS) Form – For new accounts effective 1/1/18 and after	sign now	download form download form
2018 Group Enrollment Application/Change Form – use this form to apply for group covereage effective 1/1/2018	sign now	download form

Agent will complete a separate *PowerForm* Signer document for each employee with employee's contact information.

PowerForm Signer Information

*Required

Please enter your name and email

To begin the signing process.

Your Role

Submitter

Your Name:

John Smith

Your Email:

johnsmith@email.com

Please provide information for any other

Signers needed for this document.

Role:

Employee

Name:

John Doe

Email:

johndoe@email.com

Role:

Producer

Name:

John Smith

Email:

johnsmith@email.com

Role:

GA

Name:

Glacier Group

Email:

name@midwestga.com

Begin Signing

Enter your name and email address here

Enter the name & email address of the employee here

Enter producer name and email address

Enter Glacier Group & your CSRs email address here

Click Begin Signing

The screen below will appear and the agent will need to check the box agreeing to use electronic records and signatures.   The **CONTINUE** button will turn gold and you can click on it then.

The agent will enter the group information and then click **FINISH**.

The employee will now receive the email with the application. The will also need to check the box that they agree to use electronic records and signatures. They will

complete the application and electronically sign. The completed application will automatically go to all emails listed on the PowerForm submission.

The agent will need to confirm that all applications are returned.

2. The other option is to collect hand written and signed applications from each employee.

Using the employee applications, the agent can enter the information into the BCBS enrollment spreadsheet instead of using the individual applications for enrolling employees.

Benefits of using enrollment spreadsheet:

1. Very easy to enter data into spreadsheet.
2. Creates a one page document of all eligible employees and dependents, with contact information and plan selection. So less paperwork to send to your customer service rep.
3. If employer approves, this will be another list of prospects to sell other products.
4. Spreadsheet can be used as an easy resource for the future when you get questions regarding who is enrolled and in which plan.

Using the new and updated Census Import Template Enrollment (CITE)

Determine what your Excel Version is.

- Excel 1997-2009 is not compatible with the new spreadsheet.
- Excel 2010 is mostly compatible (Have only one window open when working on a document)
- Excel 2013-2016 is compatible

Consider turning on *Enable Macros* feature

Save the CITE document to your local/network drive first **before** using.

Click on the link below to open the CITE document.

{Link to document}

Steps for Entering a Group's Census

1. Open the CITE document and save on your desktop or network using the Group's name to lable file. Do not use any spaces or special characters.

2. Enter the Division for the Group - IL and enter the information into the red blocks. As you click on the red block, a drop down may appear and you can select the correct option or just type in the information if a drop down does not appear. Click on the green *Go To Census Template* button.

Import Census Template
Census Template Setup Form

3. Enter the employee information into the red blocks which are required. The spreadsheet will respond based on the data entered and may open additional data fields.

Example: Column B enter Y or N for enrolling or waiving.   If you enter Y for waiving, then the box in column C turns red requiring the reason waiving. If you enter N to enroll employee, then different data fields will turn red for required information.

The spreadsheet is designed to make sure all information needed to enroll or waive an employee is entered.

4. If you have entered data into the spreadsheet but are unable to complete at the present time, you can click *File Save* and a pop up box will display. *Is data entry completed for this census?*   Click *No* to just save the data. Then you can come back later to finish.

5. Once data entry is complete, click **File Save** and a pop up will appear. Click **Yes** to save the file and validate the data for errors.

If there are any errors detected during the save, they will be displayed in the **Error List** tab at the bottom of the Excel sheet.

A	B
Row Nbr	**Error Description**
3	First Name is required for all Relationship Codes.
3	Last Name is required for all Relationship Codes.
3	DOB is required for Employee with Coverage.
3	Gender is required for Employee with Coverage.
3	SSN is required for Employee with Coverage.
3	Address 1 is required for Employee with Coverage.
3	City is required for Employee with Coverage.
3	State is required for Employee with Coverage.
3	Zip Code is required for Employee with Coverage.
3	Employment Status is required for Employee with Coverage.
3	Hire Date is required for Employee with Coverage.
3	Health Coverage is required for Employee with Coverage.
3	Signature Date is required for Employee.

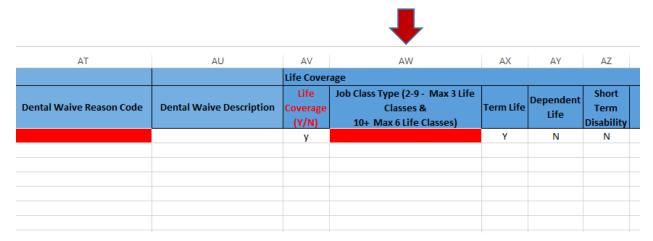Import Census Template | **Error List** | ⊕

To correct, click on the *Import Census Template* tab at the bottom of the Excel sheet and correct as needed.

When all data is entered and validated with no errors, save and email to your MIBS customer service rep.

Helpful hints:

1. Zip codes with leading zeroes can create a problem when validating. Enter something into the data field but note row and column and when you email, include the correct zip code and MIBS will fix at our end.

2. When a group offers life insurance and you check Y, the data fields in columns AW, AX, AY and AZ turn red.   AW is job class so do not enter anything in this field and when you validate or save, it will automatically populate with "All Active Full Time".

AT	AU	AV	AW	AX	AY	AZ
		Life Coverage				
Dental Waive Reason Code	Dental Waive Description	Life Coverage (Y/N)	Job Class Type (2-9 - Max 3 Life Classes & 10+ Max 6 Life Classes)	Term Life	Dependent Life	Short Term Disability
		y		Y	N	N

If you want training on this new procedure, please contact Patty Kretschmar at patty@midwestga.com.

If you have any questions or issues, please feel free to contact your customer service representative.