



Small
Business
MGA
eSignature

Effective October 19, 2020



Collecting the Master Group Application signatures through the Employer Enrollment Tool

We've added eSignature functionality to give you greater flexibility in collecting signatures of the Master Group Application.

The application work flow remains the same. When you reach the Broker Confirmation page, you will have two options to choose from:

I already have a signed paper copy of the Master Group Application

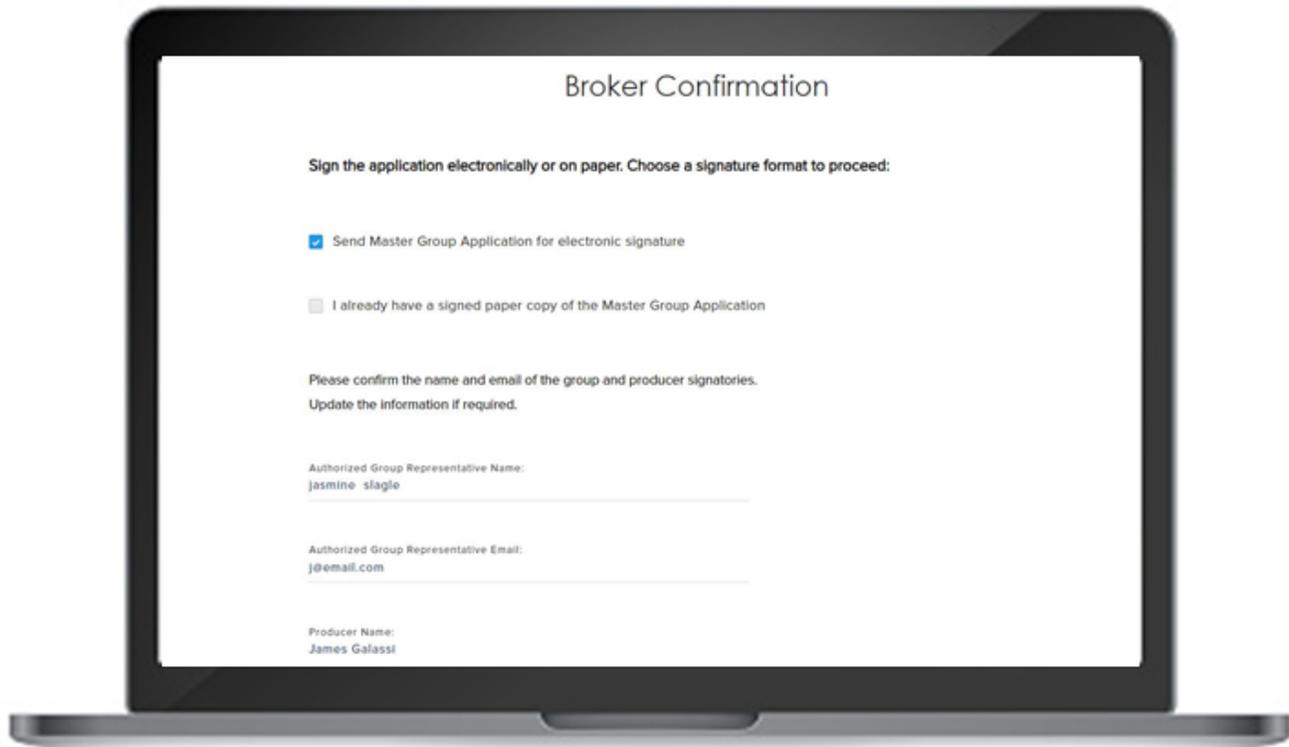
- Check this box to attest to being the broker who assisted the client in obtaining a signed paper application.

Send Master Group Application for electronic signature

- Check this box to send signature request emails to the group representative and producer.

Broker Confirmation with eSignature

When you select eSignature to sign the Master Group Agreement, signatory contact fields appear on the page.



The screenshot shows a laptop screen with a web form titled "Broker Confirmation". The form contains the following elements:

- Header: "Broker Confirmation"
- Instruction: "Sign the application electronically or on paper. Choose a signature format to proceed:"
- Radio button options:
 - Send Master Group Application for electronic signature
 - I already have a signed paper copy of the Master Group Application
- Text: "Please confirm the name and email of the group and producer signatories. Update the information if required."
- Form fields:
 - Authorized Group Representative Name: jasmine slagle
 - Authorized Group Representative Email: joemail.com
 - Producer Name: James Galassi

- The authorized group representative field is pre-populated with Primary Contact details provided earlier in the application.
- The producer field is pre-populated with the details of the logged in user.
- Edit and update the contact fields if needed.
- You must confirm the signatory information before proceeding to the next page.

Broker Confirmation with eSignature

eSignature delivery process

- Click *Submit* to send the signature request to the provided email addresses via DocuSign.
- Finish the application while signatures are collected.
- The application will be installed by Blue Shield only after the document is signed by both signatories.

eSignature notes and notifications

- If the application is flagged for review, both the additional document and signature requests need to be completed before the group can be installed.
- Email reminders are sent every five days to logged in user's email and any additional recipient emails added to the application.
- Signature requests expire after 15 days.
- If the signature request is declined or expired but the group would still like to be enrolled, log into the Employer Enrollment Tool to complete the signature step by attesting to obtaining a signed paper Master Group Application.

Broker Confirmation with attestation of paper applications

When you select to use a signed paper copy of the Master Group Application, additional attestation statements appear on the page.

Broker Confirmation

Sign the application electronically or on paper. Choose a signature format to proceed:

Send Master Group Application for electronic signature

I already have a signed paper copy of the Master Group Application

I assisted the applicant in completing and submitting this the application, consistent with the terms of my Producer Agreement with Blue Shield. I certify that, to the best of my knowledge and belief, the information on this the application is complete and accurate. I explained to the applicant, in easy-to-understand language, the risk to the applicant of providing inaccurate information, and the applicant understood the explanation.

I certify that I have and will retain the completed application on file and that the group representative has reviewed and signed the completed application acknowledge that group authorization to proceed with this application for coverage has been collected and is on file.

Broker Name: * _____ Date: * _____

- Broker confirmation attestation statements have not changed.
- Check the boxes next to the attestations and provide your name and date before selecting *Submit*.