

# DocuSign Instructions

## for Health Plans and Other Coverages

### DocuSign Overview

DocuSign®, a secure platform that allows forms to be completed online without paperwork, has replaced GuideStone's PDF forms for health plans and other coverages. However, DocuSign will not replace the [GuideStone Employer Access® Program](#) (EAP), which remains the preferred method of submitting requests due to its automated processing capabilities.

"How-to" handouts (under EAP's "Resources" tab) offer step-by-step instructions for quickly completing common EAP transactions for members with health plans and other coverages.

### How It Works

Forms exist digitally as hyperlinks (links). Clicking a link initiates a form online within the DocuSign platform, which should not be printed but completed using a computer, tablet or mobile device.

Forms requiring multiple signatures will be emailed to the next signer only after the current signer digitally completes and signs the form and clicks "Finish". Forms are emailed to one signer at a time and are never shared with two people at once. Once the last signer clicks "Finish," **the final form is automatically delivered to GuideStone for processing.**

### Initiating a Form (First Signer)

**An authorized administrator must act as the first signer** and should:

- 1 Click the appropriate link to initiate a new form.
- 2 Read the instructions and enter names and email addresses of signers 18+ (usually an administrator and employee).
- 3 Click "Begin Signing".
- 4 Complete the "Employer" and other applicable sections of the form.
- 5 Sign and date the form and click "Finish" to email the form to the next signer.

**TIP:** If an administrator is also an employee, **the same email address may not be used as both administrator and employee during step 2 (above)**. Incorrect email addresses can disrupt the "Finish Later" function and keep future signers from receiving the form. Contact GuideStone to correct an email address.

### Other Signers

After the current signer completes, signs and dates the form and clicks "Finish," the next signer should:

- 1 Locate the email from DocuSign and click the link to open the form.
- 2 Complete remaining applicable sections of the form.
- 3 Sign and date the form and click "Finish".

**TIP:** DocuSign emails may arrive in a signer's spam or junk folders. If not found, reach out to an administrator, who may contact GuideStone and request that the DocuSign be emailed to a corrected email address.

## Incomplete Forms

Ministry partners should inform their employees to review their inboxes for an invitation from DocuSign to view and sign their form. It is the ministry partner's responsibility to ensure that their employees are completing the forms in a timely manner. If a form remains incomplete for 60 days, it expires, and an administrator must click the link again to reinitiate the process and start a new form.

**TIP:** To avoid delays, administrators should notify signers that DocuSign emails often require action and signatures.

## Completed Forms Automatically Sent to GuideStone

After all required form sections are completed, all signatures are acquired, and the last signer clicks "Finish," **the final form is automatically delivered to GuideStone for processing.** There is no need to email a copy – we already have it! DocuSign also emails all signers a "Certificate of Completion" and a copy of the form for easy record keeping.

The administrator who initiated the DocuSign form will receive two "Certificate of Completion" confirmation emails, one after they sign and one after the employee signs. If the "Certificate of Completion" confirmation email does not contain both the employer's and employee's signatures, the DocuSign form is considered incomplete. It is the administrator's responsibility to request that their employee completes and signs the form. Only then will it be returned to GuideStone for processing.

**TIP:** If all signers do not receive a "Certificate of Completion" confirmation email after the employee signs the form, **administrators should contact GuideStone to review the form's status ASAP.**

## Accessing Care

All forms completed through DocuSign will be processed in the order received. If an employee urgently needs access to care, an administrator should contact GuideStone. Urgent matters related to completed forms will be reviewed within 1-2 business days.

## DocuSign Benefits

- No login or account credentials are required.
- The most up-to-date forms are always available through the links.
- When more time is needed, click "Finish Later" to receive an email with a link to the form. All prior work on the form will be saved.
- Completed forms are automatically submitted to GuideStone for processing.
- Record keeping is easy. All signers receive a copy of the final form via email.
- Reuse links as needed. A new form will be initiated with each click.

### Requesting Assistance

GuideStone maintains records of each DocuSign form through this process and is happy to assist. Email [Insurance@GuideStone.org](mailto:Insurance@GuideStone.org) or call **1-844-INS-GUIDE** (1-844-467-4843) or your Group Plans support team between 7 a.m. and 6 p.m. CT Monday through Friday.