



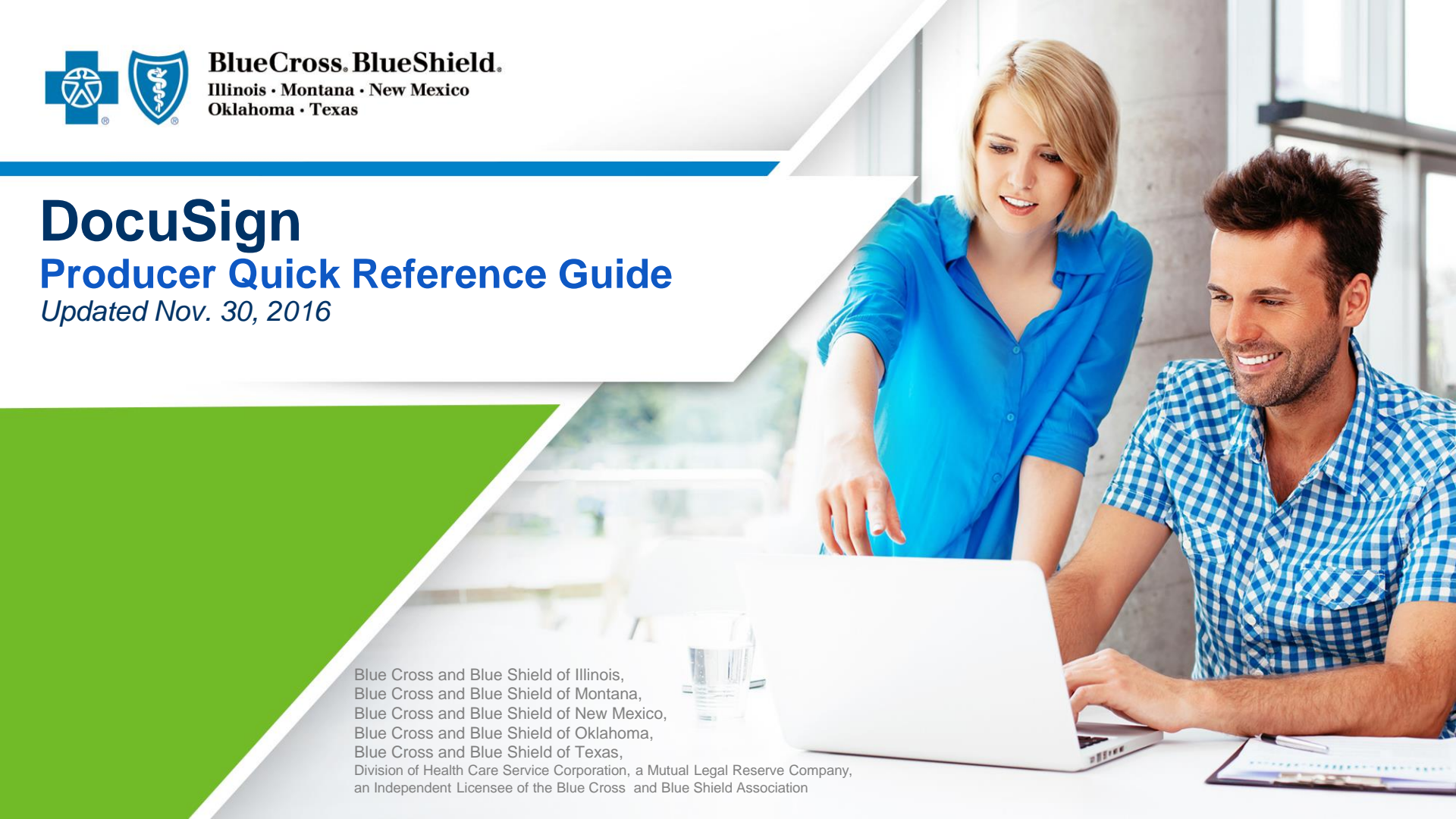
BlueCross. BlueShield.

Illinois • Montana • New Mexico
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DocuSign

Producer Quick Reference Guide

Updated Nov. 30, 2016

A photograph of a man and a woman in a professional setting. The woman, with blonde hair and wearing a blue button-down shirt, is standing and pointing at a laptop screen. The man, with dark hair and wearing a blue and white checkered button-down shirt, is sitting at a desk, smiling, and looking at the laptop. The laptop is open on the desk, and there is a glass of water next to it. The background is a bright, modern office space with large windows.

Blue Cross and Blue Shield of Illinois,
Blue Cross and Blue Shield of Montana,
Blue Cross and Blue Shield of New Mexico,
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Quick Reference Guide: New Signing Experience – How to Sign

1. Review the DocuSign email

Open the email and review the message from the sender. Click **Review Document** to begin the signing process.

2. Agree to Sign Electronically

Review the consumer disclosure and select the checkbox I agree to use **Electronic Records and Signatures**. Click **Continue**

3. Start the signing process

Click the **Start** tag on the left to begin the signing process. You are taken to the first field requiring action. Click the **Sign** tag. You are asked to adopt your signature.

4. Verify your name

Verify that your name and initials are correct. If not, change them as needed.

5. Adopt a signature

Do one of the following:

- Accept the default signature and initial style.
- Click **Select Style**, and select a signature option
- Click **Draw**. Draw your signature using a mouse, or your finger or a stylus.

6. Save your Signature

Click **Adopt and Sign** to adopt and save your signature information and return to the document.

7. Confirm Signing

When you finish clicking all signature tags in the document, confirm signing by clicking **Finish**.

Note: A message appears stating that you have completed your document. You can now download a PDF copy or print a copy of the document. The sender receives an email with the signed document attached, and the signed document appears in their DocuSign account.

*** The Producer will need to Download a PDF version of the completed document and submit to BlueCross BlueShield following their current process.***

Quick Reference Guide: New Signing Experience – How to Sign

- 1. Got to Send**
Choose **Send a Document** from the **New** drop down menu on either the Home or Documents tab.
- 2. Upload your Document**
Click **Upload a File** to upload a document from your computer, or click **Get From Cloud** to upload a document from an online location. Locate the document you want to upload and click **Open**.
- 3. Add the recipient**
Under **Add The Recipients**, enter the recipient's name and email address. Choose **Needs to Sign** for those recipients you need to have sign.
- 4. Add the email subject and message**
DocuSign automatically adds an email subject when you upload a document. You can edit this subject and add a message to the recipient by filling in the **Message** field.
- 5. Add signing fields**
Click **Next**. The **Fields** menu appears on the left side of the screen and your document appears on the right side. The recipient name is on the **To** line at the top of the document.
To assign a signature or other field for the recipient, click and drag a field from the **Fields** menu and place it on the document.
- 6. Send your document**
When ready, Click **Send**.