



Accessing the State Group Life Insurance Application via DocuSign

BACKGROUND

The current climate of many State of Wisconsin employees temporarily working from home has impacted the ability for employers and employees to provide actual signatures on many insurance applications, but most specifically the State Group Life Insurance application. Securian requires an actual signature and will not accept an email or a typed name in the signature field because it is not considered a valid form of electronic signature.

New employees will continue to make their enrollment elections within the STAR PeopleSoft system. This has been approved by ETF as a valid electronic signature/authentication since the employee is required to enter their unique ID and password to access the system.

For employees who experience a life event or is a new hire (ex: hire from affiliate or LTE who becomes WRS eligible), the STAR PeopleSoft system is not available to make benefit changes nor allows for enrollments. They must complete paper applications. For most of these forms, ETF will accept an employee's and employer's electronic signature.

Central Benefits has received approval from ETF and Securian to add the State Group Life insurance application to DocuSign to allow for electronic signature. DocuSign captures data that Securian can see and use to confirm the signature is real and valid to the employee/agency.

Other Benefit Applications

ETF has begun the process of converting some of their forms for WRS and benefits to fillable PDF files. Their goal is to make it easier and more convenient for members and employers to complete forms. ETF has indicated they will accept most forms that have an employee and employer electronic signature. Please refer to [ETF's Bulletin](#) regarding which forms have been converted to PDF fillable forms and allow electronic signatures.

Who will be using DocuSign

Each agency has identified Payroll & Benefits staff who should be added to DocuSign. Once the account has been established, the P&B Specialist would need to create a password. Once the account setup is complete, the P&B Staff member will be able to log into DocuSign and access the State Group Life Insurance application. Central Benefits Staff will also have access to the State Group Life Insurance application within DocuSign.

How to Access the State Group Life Insurance Application in DocuSign

The P&B Specialist must have a DocuSign account to access the State Group Life insurance application.

If your agency has their own DocuSign account, you will log in using the credentials assigned to you.

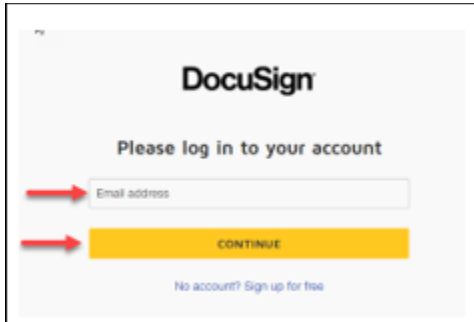
1. Log into DocuSign by going to www.DocuSign.com. Click on "Log In" in the upper right-hand corner.



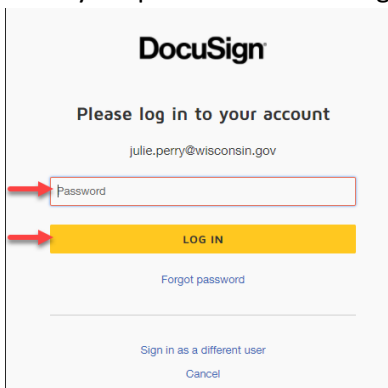
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2. Enter your email address and hit continue.

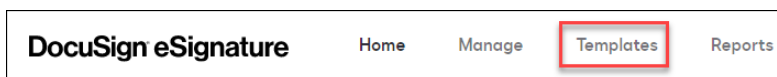


3. Enter your password and hit Log In.

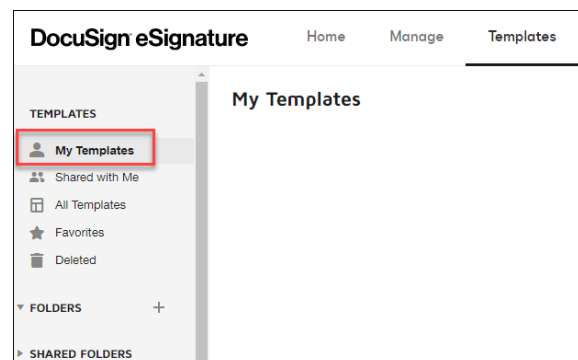
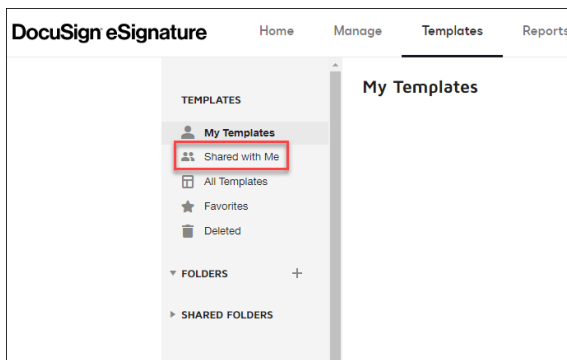


To access the State Group Life Insurance application, follow these instructions:

4. Click on Templates located at the top of the page.



5. Under "Templates" on the left-hand side, click on "Shared with Me".
 - a. Agencies who are using their own DocuSign account can find the application under "My Templates".





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6. Select the State Group Life Insurance template by clicking the “USE” button.

| Name | Owner | PowerForms | Created Date | Last Change | Folders |
|--|-------------|------------|-------------------------|---------------------------|---------|
| State Group Life Insurance Application Excluded from matching | Nicole Rute | | 8/5/2020 10:46:20 am | 10/26/2020 03:29:05 pm | |

7. Enter the following information:
- Employee first and last name and Email address
 - P&B Specialist first and last name and email address
 - The ETF information should already be pre-populated. You do not need to enter anything in this section.

State Group Life Insurance Application

Recipients

1 **Employee** NEEDS TO SIGN CUSTOMIZE ▾

Name *

Email *

2 **Benefits Specialist** NEEDS TO SIGN CUSTOMIZE ▾

Name *

Email *

3 **ETF** CC RECEIVES A COPY CUSTOMIZE ▾

Name *

Email *

This is pre-populated for you.

8. Under “Message to All Recipients” is the Email Subject line. This will include the pre-filled message you see in the box below. Within the “email message” box, you can include instructions or specific notes for the employee. Whatever you put in this field can be seen by ETF so please be conscious of sensitive information.
9. Click “SEND” to forward the application to the employee to complete and sign. DocuSign will take the employee through the marked areas of the application where they must complete, including the signature line.



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State Group Life Insurance Application

Recipients

| | | | |
|---|--|--------------------|-------------|
| 1 | Employee Name * <input type="text"/> Email * <input type="text"/> | NEEDS TO SIGN | CUSTOMIZE ▾ |
| 2 | Benefits Specialist Name * <input type="text"/> Email * <input type="text"/> | NEEDS TO SIGN | CUSTOMIZE ▾ |
| 3 | ETF Name * <input type="text" value="ETF"/> Email * <input type="text" value="ETF SMBSTAR Insurance@etf.wi.gov"/> | CC RECEIVES A COPY | CUSTOMIZE ▾ |

Message to All Recipients

Email Subject*

SEND ADVANCED EDIT DISCARD

Advanced Options | [Edit](#)

- Recipients can view documents more easily on mobile devices with responsive signing **NEW**
- Recipients can change signing responsibility

- When the employee completes the application, it will be returned to the P&B Specialist. DocuSign will take the P&B Specialist through the marked areas of the Employer Section, including the signature line, to complete the application. Once completed, the application will be sent to ETF for their records.
- The agency will have an opportunity to print off the completed application for the employee's file. The employee will be notified that all parties have signed the application and can print off a copy for their own records.
 - To print a copy of the State Group Life insurance application, click on "Manage" or go to your "Sent" folder. Click on the document you wish to print.



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The screenshot displays the DocuSign eSignature interface. At the top, there are navigation tabs: Home, **Manage** (highlighted with a red box), Templates, and Reports. On the left side, there is a sidebar with a 'NEW' button and a 'Shared Envelopes' button. Below these, under the 'ENVELOPES' section, there are icons for 'Inbox', 'Sent' (highlighted with a red box), 'Drafts', 'Deleted', and 'PowerForms'. The main area shows an 'Inbox' with a filter set to 'Date (Last 6 Months) | Edit'. A 'Subject' header is present above the list of envelopes. The list contains three items, each with a checkbox on the left and a green checkmark to its right. The first item is 'Please DocuSign: et2304_0.pdf' with 'To: Nicole Rute, Julie Perry +2 more'. The second is 'Test with multiple recipient copies' with 'From: Nicole Rute'. The third is 'Please DocuSign: et2304_0.pdf' with 'To: Nicole Rute, Julie Perry +2 more'. A red callout box with the text 'You can check the box or click anywhere on that row' has two red arrows pointing to the checkbox and the first item's text, respectively.