

Adobe Sign Access and Navigation

Adobe Sign is a tool that is used to collect Agent and Employer signatures during the **Launch My Group** process. After an agent has obtained an Account Manager Quote and entered all enrollment information into Launch My Group, the agent will be required to enter a name and email address for the Agent Signatory and Employer Signatory. The paperwork will be delivered first to the agent and then to the employer for signatures.

Adobe Sign can be accessed through this link (save as a favorite):

<https://humana.na1.echosign.com/account/home>

Tips and Tricks

- If a document is cancelled, the notes are in the history screen along with who cancelled it. If the person cancelling the document is not the agent or group, **please do not release that to the customer**, email LaunchMyGroup@humana.com.
- If there are multiple documents for the same group that are not in a cancelled or signed status, email LaunchMyGroup@humana.com.
- When searching full text, it does mean full text. It will not bring back results if you try searching by partial name. Best practice is to search by the most UNIQUE word in the group name. Ex: Group name is Fisher, Herbst, and Kemble. Searching by "Herbst" should bring back the fewer results than "Fisher."
- Adobe Sign will timeout, if it has been open awhile try closing and opening again if not getting a return on your search.
- **ONLY** if the group is in 'Signed' status would we provide the following guidance:
 - Level Funded groups with a gated/CAS HMO will have group number issued and welcome letter generated in approximately 8 business days.
 - Level Funded groups that do not have a gated HMO will have group number issued and welcome letter generated in approximately 4 business days.
 - Non level funded groups will have group number issued and welcome letter generated in 2 business days

In order to access paperwork that has been delivered through Launch My Group, you will need to switch to the SGAI Shared Account. If you are on the Dashboard page, this can be accomplished in the lower right corner titled 'Switch to Shared Account' and clicking on the Adobe SGAI link.

Humana. POWERED BY Adobe Sign

Dashboard Send Manage Reports Troy

Hello, Troy What would you like to do?

Search documents, recipients & notes Search

Get a Signature

[Get a Document Signed](#)
Get a signature in seconds

Send from Library
Select a document Start

Use a Workflow
Select a workflow Start

Additional Functions

[Add Template to Library](#)
Store frequently-used templates

[Create Widget](#)
Embed a signable document

[Fill & Sign](#)
Sign anything you've been sent

[Archive a Document](#)
Upload into your account

[Mega Sign](#)
Send to many people at once

Account Activity for This Month

Agreements Completed Median Time to Complete

11% 57.0 min.

17 in progress 2 completed

[View Reports...](#)

Recent Alerts

- TEXAS BAR & GRILL Sold Case Documents has not been signed as of yesterday at 4:16 pm
- THE REBUCK AND MOORE GROU Sold Case Documents has not been signed as of yesterday at 2:30 pm
- TEXAS SWIM ACADEMY Sold Case Documents has not been signed as of yesterday at 1:08 pm

[More...](#)

Waiting For Me

- 11 waiting for me to sign [See All](#)
- 1 waiting for me to approve [See All](#)

Recent Events

- You viewed Humana Installation Paperwork's [The birthplace of aviation EGA](#) (Today at 12:27 PM)
- You viewed Humana Installation Paperwork's [Fully Insured Example EGA](#) (Yesterday at 11:59 AM)
- You viewed Humana Installation Paperwork's [TEST EGA](#) (Dec 31, 2018 1:19 PM)
- You viewed Humana Installation Paperwork's [Group name test 123 EGA](#) (Dec 28, 2018 1:37 PM)

[More...](#)

Switch to Shared Account

- Account Installation
- Adobe SGAI
- Erin Flanagan
- Kevin Belinske
- Tamecia Richmond

Navigation

Adobe Sign has three main areas of information

1. Document Search
2. Document Status
3. Document Properties

Viewing Account of Adobe SGAI Show my account

Due to the size of your account, only agreements from the last 30 days were loaded. Please use the search box below to find agreements that are not displayed.

1 Search documents, recipients & notes

Search Full Text Title Status Participant email Search Specific Fields

Tip: You may search by status e.g. 'Signed', 'Out for signature', 'Library', 'Widget', etc.

Filter by Name or Company Filter by Document Status

Name	Company	Document Title	Date
Waiting For Me to Sign (0)			
Draft (1)			
Out for Approval (155)			
Out for Signature (105)			
Signed (749)			
Canceled/Declined (101)			
Expired (2)			
Archived (0)			

Upload Agreements

3

CHRISTIAN HEALING MINISTRIES Sold Case Documents

From: Adobe SGAI (Humana)

To: Donald Mergener (tishana.geno@benefitmall.com), accountant@christianhealingmin.org

Date: 01/03/2019 12:47 PM

Status: Out for e-signature

Replace Signer

Message: Humana Launch My Group - Thank you for choosing Humana! Should you have any questions, please call us at 800.666.6666

View Share Protect Remind History Notes

Employer Group Application **Humana**

1. GROUP INFORMATION: Group name: Humana

2. GROUP CONTACTS: Group administrator: Donald Mergener

3. GROUP MEMBERSHIP: Group members: Donald Mergener

4. GROUP DOCUMENTS: Group documents: Employer Group Application

1. Document Search

The Document Search feature can be used to locate paperwork that has been sent out for signature. Most often you will use the 'Search Full Text' option and enter the group name. If you are unable to find the document by the group name, Adobe also provides the ability to search by Participant email (either the agent or employer email address). Title Search and Status Search are not used due to the volume of documents.

2. Document Status

If paperwork has been delivered through Adobe Sign, there are several different steps in the process.

- **Out for Approval** – this means the paperwork has been sent to the agent and is waiting for the Agent to sign the document
- **Out for Signature** – the agent has signed the document and has been sent to the Employer for signature.
- **Signed** – the paperwork has been signed by both the agent and employer; this will trigger the Robotic Process Automation (RPA) to complete the enrollment process

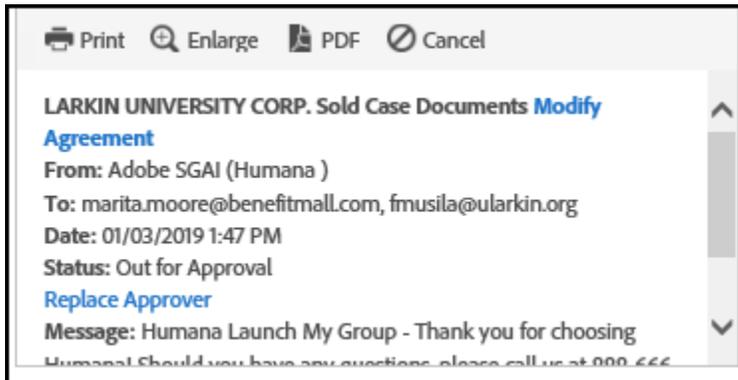
- **Cancelled/Declined** – if the agent or employer refuses to sign the document they have the ability to decline the process. A work item will generate with the reason for declination.
- **Expired** – The document was not signed prior to the paperwork expiring.
- **Waiting for me to Sign, Draft, Archived** – Not used for Launch My Group

3. Document Properties

This area will allow you to identify the delivery information as well as the ability to replace the designated signatory or deliver a reminder. The email address provided first is the agent email followed by the employer email.

Example:

- The group name is 'Larkin University Corp'
- The agent email was entered as marita.moore@benefitmall.com
- The employer email was entered as fmusila@ularkin.org



Process for Adobe Requests

Step	Action
1.	<p>Log into the SGAI Adobe account by navigating to https://humana.na1.echosign.com/account/home</p> <p>Click on the Adobe SGAI link in the 'Switch Accounts' box</p>
2.	<p>Enter the first word or two of the group name in the 'Search Full Text' field and hit enter.</p> <p>If the group has triggered Adobe paperwork it should show up in one of the document status fields. If the name does not appear, try entering fewer characters of the group name (For Example, if the group name is 'Rite-Way Electric' and nothing shows up searching 'Rite-Way' try searching 'Rite')</p> <p>Did the group show up in one of the document statuses?</p> <p>If Yes and the group is not in 'Signed' status the paperwork is still waiting to be finalized, go to step 3. If Yes and the group is in 'Signed' status, go to step 10</p> <p>If No, the group may have triggered a request to have the quote updated (this occurs when the quote does not match the information entered into Launch My Group) – verify the status of the group on the Launch My Group Report (the Adobe guidelines should only be used if the most recent status is 'Waiting For Documents Signature').</p>
3.	<p>Is the caller asking to verify the agent/employer email address on file?</p> <p>If No, go to step 4 If Yes, go to step 6</p>
4.	<p>Is the request to send paperwork to a new email address?</p> <p>If No, go to step 5 If Yes, go to 8</p>
5.	<p>Is the request checking status?</p> <ul style="list-style-type: none"> - The agent or the employer have not received paperwork - The agent has received paperwork and wants to validate the employer received paperwork <p>If Yes, go to step 9</p>

	<p>If No, verify the status of the group on the Launch My Group Report (the Adobe guidelines should only be used if the most recent status is 'Waiting For Documents Signature') or follow normal guidelines</p>
<p>6.</p>	<p>If you look in the document properties, the first line will always be the group name and the second line will indicated the paperwork was delivered from Adobe SGAI (Humana). You will be able to identify who the agent entered as the agent an employer email contacts based on the information following the TO field – the agent email is listed first followed by the employer.</p> <p>Click on the History Tab in the document properties. Scrolling to the bottom you will see the last action, most likely being 'Waiting to be signed by XXXX (YYY@ZZZ.com)' This indicates who the document is waiting for signature.</p> <p>Verify with the caller that the email address is accurate. Is the email address accurate?</p> <p>If Yes, go to step 7 If No, go to step 8</p>
<p>7.</p>	<p>The email address is correct and a reminder will need to be sent. Click on the Remind tab to create a reminder.</p> <p>Select the appropriate email address to send a reminder to in the 'Who do you want to Remind?' area by clicking the checkbox next to the person's name. If only a name is provided, you can hover over the name and the email address associated with that account will pop up.</p> <p>Make sure the 'Send the Reminder' is set to 'Right Now' In the 'Add a Note:' field, enter: 'Please sign the Humana documents' Click 'Set Reminder'</p> <p>Thank the caller for using Launch My Group.</p>
<p>8.</p>	<p>An email address was most likely not entered correctly or a secondary email address needs to be added for the agent or employer.</p> <p>Click on the History Tab in the documents property area and scroll to the last action, most likely being 'Waiting to be signed by XXXX (YYY@ZZZ.com)' This indicates who the document is waiting for signature.</p> <p>If the email address needs to be replaced or an additional email needs to be added, click the 'Replace Signer' link and you will be brought to the 'Replace Signer' page.</p> <p>Enter the correct/additional email address in the Email field Enter "Please sign the Humana documents' in the Message field</p>

	<p>Click the 'Replace Signer' button</p> <p>Thank the caller for using Launch My Group</p>
9.	<p>The caller is requesting status on a group and it is showing in a status other than 'Signed'</p> <p>If the group is in 'Canceled/Declined' status, please reach out to Troy Vandermause (tvandermause@Humana.com) and Erin Flanagan (Eflanagan@Humana.com) to review the declination reason (this information is not currently provided in Adobe.</p> <p>If the group is in 'Out for Approval' or Out for Signature' click on the History tab and review the notes with the caller to identify what action needs to occur. To send a reminder go to step 7, to replace a signer go to step 8.</p> <p>If the group is in 'Signed' Status go to step 10.</p>
10.	<p>No further action is needed from the agent when a group is in 'Signed' status, the enrollment process will be underway and we will contact with any additional information needed. ONLY if the group is in 'Signed' status would we provide the following guidance:</p> <ul style="list-style-type: none"> - If the group is Level Funded and has a gated/CAS HMO it will be issued in approximately 8 business days - If the group is Level Funded and does not have a gated HMO it will be issued in approximately 4 business days - If the group is not level funded it will be issued in 2 business days <p>If the agent indicates it they have waited beyond the timeline above, please email LaunchMyGroup@Humana.com to request status – DO NOT communicate this email address outside of Humana.</p>