

Agent FAQ



DocuSign Paperless Enrollment – Frequently Asked Questions (FAQ)

If a beneficiary does not have an email address, can I still use DocuSign for their application?

No, the beneficiary **MUST** have an email address and a device that can access the internet (smart phone, tablet, or computer).

Do I still have to get a Scope of Appointment (SOA) from the AVL?

You must have an SOA. You can either get an SOA via the AVL or use the DocuSign SOA form.

Does the presentation have to be recorded?

No. All emails, signatures and IP addresses are recorded – with time stamps.

After my presentation with the beneficiary, do I have to send them any documents?

Yes, you **MUST** email the beneficiary the Summary of Benefits, star ratings document, and comprehensive formulary prior to sending the application.

Where can I access the Summary of Benefits, star ratings documents and comprehensive formulary?

- Step 1: [Click here](#) to access the WellCare website, then select a state.
- Step 2: Hover over the “Members” option from the top header menu, then click “Find My Plan” under the Medicare section.
- Step 3: Select the plan (PDP/MAPD), enter the beneficiary's zip code, then click search.
- Step 4: Locate the plan to be discussed with the beneficiary, then click Go to my plan details.
- Step 5: The Summary of Benefits and Star Rating are under Plan Specific Documents and the formulary is under the Pharmacy menu on the right.
- Step 6: Download the PDFs of the documents to attach to the email for the beneficiary.

Is there a preferred web browser?

No, but if a mobile phone is being used, select *web browser* instead of *mobile view*.

Are the DocuSign documents mobile friendly?

Yes, but they are not very user friendly. For example, if you turn your phone screen view sideways the information within the document may disappear, and the page will have to be refreshed. There have also been reports of the application responses overlaying incorrectly.

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How do I access DocuSign?

The DocuSign applications and SOA form links are available in Agent Connect under the Enrollment Materials menu option.

What is the DocuSign access code for the beneficiary signature?

wc2020 – It is case-sensitive; notice the letters are lowercase.

If an agent enters any email address incorrectly, do they have to create a new form?

Yes. If a beneficiary states they did not receive the email, verify the email address is spelled correctly, including the email provider. (For example, @gmail.com, @yahoo.com, or @icloud.com.) Be sure to verify before escalating to Sales Support.

If the agent gets an error while completing a DocuSign form, what should they do?

Refresh the screen; most information will have been saved.

How many attempts does the beneficiary have to enter the access code?

Three attempts can be made. Please take your time with spelling out the code “wc2020” to ensure they receive this information, or the application will not be able to be completed. If the beneficiary exceeds the three attempts, then a new application will need to be completed by the agent and sent back to the beneficiary.

The beneficiary or agent cannot locate their DocuSign email. What can they do?

Have the beneficiary search spam and other folders for keyword “DocuSign” or “Enroll now”; also, verify the beneficiary’s email address is spelled correctly.

If an agent forgets to fill out EFT information, will the member be set to Coupon Book instead?

Yes, the beneficiary would need to call Member Services or log into their WellCare portal to fix this.

If I find an error on an application before it is submitted, what do I do?

As long as the error is caught before the agent signs the application (the final step in the process), you can create a new application with correct information. You cannot modify an existing application, so simply delete the incorrect version.

How do I send the application to enrollment, after all signatures are received?

Once the agent signs the application, it is automatically uploaded to enrollment. No further action is required.

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If I submit an application and later find out I entered incorrect information, what do I do?

Escalate to leadership and re-complete the application with the correct information. If the application went into a request for information (RFI) status, you can also submit an Agent Connect ticket or call the RFI line to update this information.

Is the Member Checklist required?

No, the Member Checklist is not required, but it is strongly encouraged.

When will the member show in my application search tool in Agent Connect?

The timeframe is similar to the time it takes to process a paper enrollment application which is seven to ten business days.

Do I have to keep records of my completed DocuSign materials?

Yes. You must save all materials in a locked and secure location, as they contain PHI.

What if the application is not in the agent's Application Search Tool?

After seven to ten business days, the agent should attach the completed enrollment application PDF to a Sales Support ticket in Agent Connect.

Can I reply to the DocuSign email for more information?

No, that email box is not monitored. Contact Agent Support or create a Sales Support ticket in Agent Connect if you have questions.

Is there technical support available, if the agent receives an error when using DocuSign?

Please, escalate any errors to Sales Support.

What do I do if I don't receive a final confirmation email for a completed application?

You should be downloading and saving all PDF documents after each signer completes their step. If you forget to download, you may review documents at the link below "Review Documents."

Warning: This does expire shortly after the completion of the process.



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If the beneficiary does not sign and complete the application the same day, will they be able to access it at a later date?

Yes, they will be able to access the application up to fourteen days after they received the email. After the fourteen days, the application will expire. If this happens, you will need to start the enrollment process over, starting with a new Scope of Appointment.

Will reminder emails be sent to the beneficiary or me if the application isn't completed the same day it was sent?

Yes, a reminder email will be sent to the party (beneficiary or agent) who needs to complete the next step on the application every seven days.

Can I do a test SOA form DocuSign?

Yes! You can test the SOA form **ONLY** but be sure to use all 9's in numeric fields and **TEST** in all character fields. For test cases only, you can use your email in both the agent and member fields to test the signature process. You can then fully test the functionality of DocuSign. However, we are in a live environment, so **DO NOT** submit a test application! All completed applications are sent to enrollment for processing and there is no way of stopping an application from being processed after it is completed. Also, **DO NOT** use your email for the member's email for actual enrollments.

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