

Agent/Broker Onboarding for Health Plans



USE CASE PROFILE: Health Plans

Challenge: Faster Agent/Broker Onboarding

With the passage of the Affordable Care Act and the individual mandate requiring all Americans to have health insurance, the pressure is on for payers to enroll a greater number of customers than ever before. Agents and brokers play a key part in the process, enrolling individuals, families, and employers in qualified health plans. To meet this demand, many health plans are in the process of ramping their broker network.

But onboarding new brokers can be cumbersome. Issuers must check agents' and brokers' licensure status and verify registration with federally-facilitated and/or state partnership marketplaces. Agents and brokers must provide copies of training certificates and must complete broker agreements before the relationship can begin. Relying on manual signatures is antiquated and can slow the growth of your broker network.

DocuSign Solution

DocuSign expedites the new dealer and broker onboarding process from initial application to final contract by streamlining the task of collecting and signing the many required documents. Agents and brokers simply fill out and sign all forms electronically, from any device. Our forms library lets your staff easily select the appropriate forms, and robust workflow capabilities let you specify any signer order. Automated reminders help speed the process. DocuSign also provides complete reporting, audit trail, and document retention capabilities.

DocuSign Key Benefits

DocuSign speeds and simplifies your agent/broker onboarding process. From broker agreements to compensation schedules to licensing attestations, you will significantly cut the time to get complete, signed documents. With DocuSign brokers can see exactly where they need to provide information and sign, so there are no errors.

DocuSign accepts all common file formats—PDF, Word, Excel, and many more. And it provides a clear electronic view of where applicant's documents are in your process. No wonder more than 48 million companies and individuals worldwide already trust DocuSign for their signatures.

Broadest Acceptance Among Agent/Brokers, Customers, and Partners

As the leader in electronic signature, DocuSign has the broadest acceptance in the market. We partner with providers such as iPipeline so data can flow seamlessly between your systems, those of your agent/brokers, and downstream partners. And DocuSign has been widely adopted by the agent/broker community. In the words of Jeff Arnold, President of RightSure Insurance agent group, "the time savings from DocuSign is significant and substantial. I can't imagine our business without DocuSign."

About DocuSign

DocuSign® is the global standard for electronic signature®. DocuSign accelerates transactions to increase speed to results, reduce costs, and delight customers with the easiest, fastest, most secure global network for sending, signing, tracking, and storing documents in the cloud.



For U.S. inquiries: toll free 877.720.2040 | docusign.com
For European inquiries: free phone +44 203 510 6500 | docusign.co.uk

Copyright © 2003-2014 DocuSign, Inc. All rights reserved. DocuSign, the DocuSign logo, "Close it in the Cloud", SecureFields, Stick-eTabs, PowerForms, "The fastest way to get a signature", The No-Paper logo, Smart Envelopes, SmartNav, "DocuSign It!", "The World Works Better with DocuSign" and ForceFields are trademarks or registered trademarks of DocuSign, Inc. in the United States and/or other countries. All other trademarks and registered trademarks are the property of their respective holders.