

Covered California streamlines the business of health insurance using DocuSign for Salesforce and the DocuSign eSignature

Covered California is the state-based marketplace where Californians can sign up for health insurance under the **Affordable Care Act (ACA)**. As such, Covered California has a mission to ensure access and enrollment to ACA-compliant plans for all Californians seeking individual and family insurance when they do not receive those benefits through an employer.

Covered California works with 11 insurance companies that provide qualified health plans. To best serve Californians, Covered California engages more than 14,000 certified agents, brokers, and community partners that provide advice and enrollment assistance regarding qualified health plans to California residents. These professionals and agencies are collectively referred to as entities.

Before they can offer services to the public, each of these entities must have a signed agreement – which is reviewed and renewed on an annual basis – with Covered California. These services are governed by federal and state regulations, so processing and finalizing each agreement – which includes a signed agreement, supporting documentation, and certifications – requires many reviews and approvals by Covered California.

The business process for managing the entity agreements was inefficient, time-consuming, and costly. Covered California also was challenged by a lack of visibility into work. Each year, thousands of pages of paper were ushered through various divisions, including sales, finance, and legal – often by being walked from one office to another. Data extracted from the paper documents was manually keyed into spreadsheets, then uploaded into a database for review. The paper, ink, and staff required to process these agreements was significant, and the overall process slow.

Enter digital transformation and the incorporation of DocuSign into Covered California's business process. Covered California already used DocuSign to obtain electronic signatures from contracted agents at the end of the business process. Covered California sought a fully automated, digital solution that would reduce paper and ink, streamline paperwork, speed time to approval for agreements, provide security and confidentiality of entity information and signatures, and permit visibility of the agreement and process status to relevant parties.

“The DocuSign digital solution is incredibly flexible. It allows us to include the necessary approvals and workgroups from many departments and to automate workflow. With DocuSign, our processes are much more secure, streamlined, and efficient.”

Austin Walls-Barcellos

Project Manager - Information Technology Specialist I
Covered California

The Road to Optimal Health

Covered California had a use case for automated templates and electronic signatures. The use case indicated significant potential for automating the multi-stage approval process and electronic signatures. Since Covered California uses [Salesforce](#) to manage many parts of its business, it turned to [Zennify](#), a leading expert in providing custom Salesforce solutions, especially those that integrate the DocuSign eSignature API.

Zennify focused on creating a positive user experience (UX), while also incorporating existing technologies used by Covered California: DocuSign and Salesforce. Covered California decided to implement the [Salesforce Community Cloud](#), sometimes referred to as Salesforce Communities. Salesforce Communities enables companies to create a customer or partner portal that is custom branded. The Covered California portal in the Salesforce Community Cloud provides these benefits:

- Enables community partners to use a fully automated process to initiate, sign, and complete their agreements to become Covered California-authorized entities.

- Provides digital transformation of existing business processes using [DocuSign for Salesforce](#), the [DocuSign eSignature API](#), and [Salesforce Custom Buttons](#).

- Centralized, mobile-enabled website manages the entire process and provides two-way communication between Covered California and its entities.

While DocuSign for Salesforce provides a prebuilt integration that can be used for many business scenarios, Covered California needed a highly flexible integration with Salesforce Communities. To create this flexibility, Covered California extended DocuSign for Salesforce functionality by implementing a Salesforce custom button that calls the DocuSign eSignature API. This enabled Covered California to bridge the gap between Salesforce Communities and DocuSign. Behind the custom button functionality is a coding language called [APEX](#), which is similar to Java. The entity agreement process involves providing key business information and is completed sequentially, as follows and as shown in Figure 1 (below):

Sections 1 – 5 – Entity provides key business information as shown in Figure 1 (below).

Section 6 – Entity provides three types of documentation required by Covered California. This documentation can be provided in any order:

- Entity Agreement** – This step compiles all the data entered in sections 1 through 5 and generates an agreement document that is sent to the entity for eSignature. (See the **How It Works** section below for more details on the technical implementation.)

- Proof of Business Status Documentation** – Documentation that provides a Tax ID Number on letterhead to prove eligibility to be or remain an entity.

- Proof of Insurance** – Documentation that proves the entity carries a minimum of \$1,000,000 of liability insurance.

Section 7 – Qualifying Attestations – Series of five statements certifying eligibility.

The entity is prompted in each of the seven sections to either enter data or upload documents for review by Covered California, so those steps are not covered in this API success story. However, from a DocuSign perspective, the compelling part is when the entity clicks the **DocuSign CAE Agreement** custom button shown in Figure 1. This custom button was created within the [Salesforce Lightning Platform](#) to initiate the eSignature process for the Certified Application Entity (CAE) Agreement. For more information about how the custom button was implemented, see **How It Works** later in this API success story.

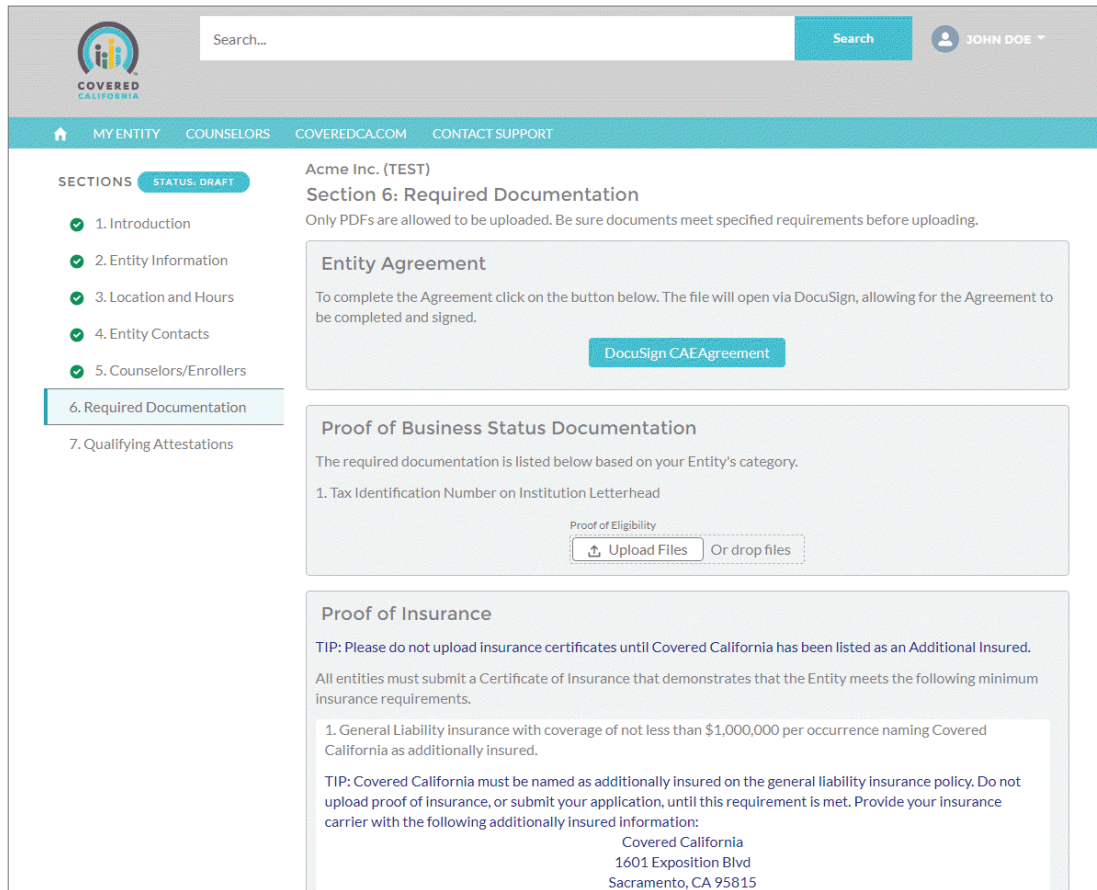


Figure 1. Salesforce Communities page showing completed data entry and custom button to send the agreement for eSignature.

Covered California created these [DocuSign templates](#), each of which is used for a specific purpose:

Certified Application Entity (CAE) Agreement

Medi-Cal Managed Care Plan (MMCP) Agreement

The APEX code automatically selects the correct template based on the information the entity has provided in Sections 1 – 5. For example, DocuSign templates are determined by the type of entity (e.g., Certified Application Entity, Certified Enrollment Entity), how an entity provides services (e.g., at a private office, through a community clinic), and whether an entity is compensated by Covered California or by the plan-based provider.

After selecting the correct template (and looking up the corresponding Template ID), Covered California calls the DocuSign eSignature API to specify recipients and substituted Salesforce Communities field values (from Sections 1 – 5) for the preconfigured [DocuSign Tab](#) values in the selected template. The result is a recipient receiving the populated agreement document via email, which is shown in Figure 2.

Please review the documents below. FINISH OTHER ACTIONS ▾

DocuSign Envelope ID: 3B56DCBA-EFE9-4092-AA89-13BC4045A26B

STATE OF CALIFORNIA
STANDARD AGREEMENT
 STD 213 (Rev 09/05)

	AGREEMENT NUMBER
	REGISTRATION NUMBER

1. This Agreement is entered into between the State Agency and the Contractor named below:
 STATE AGENCY'S NAME
 California Health Benefit Exchange
 CONTRACTOR'S NAME
 Acme Inc. (TEST)
2. The term of this Agreement is: _____ through June 30, 2018
3. The maximum of this \$ Undefined
4. The parties agree to comply with the terms and conditions of the following exhibits which are by this reference made a part of the Agreement.

 Certified Application Entity Agreement 17 Pages

IN WITNESS WHEREOF, this Agreement has been executed by the parties hereto.

CONTRACTOR	California Department of General Services Use Only
CONTRACTOR'S NAME (if other than an individual, state whether a corporation, partnership, etc.) John Doe	
BY (if not a Signature) _____	DATE SIGNED (do not type) 11/9/2017
PRINTED NAME AND TITLE OF PERSON SIGNING	
ADDRESS	

Figure 2. Sample agreement showing data populated from sections 1-5, ready for eSignature.

After the DocuSign agreement is signed, the Salesforce Communities page shows a checkmark in the Entity Agreement area of Section 6. The supporting documentation (proof of business status, liability insurance, etc.) can be uploaded at any time by the entity, but all sections must be completed for Covered California to begin reviewing the documents. All signed and uploaded documents are stored in the Salesforce Communities record for the entity (displayed as **Account**) in the **Required Documentation** section, as shown in Figure 3.

Search

 JOHN DOE ▾

MY ENTITY
COUNSELORS
COVEREDCA.COM
CONTACT SUPPORT

Account

Acme Inc. (TEST)

+ Follow
Edit

Program Type	Phone	Website	Primary Location Address
Certified Application Entity			1234 Test Ave., Sacramento, CA, 95834

Entity Information	Required Documentation (1) New																
<table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 30%;">Account Name</td> <td style="width: 30%;">Entity Status</td> <td style="width: 30%;"></td> <td style="width: 10%;"></td> </tr> <tr> <td>Acme Inc. (TEST)</td> <td>Draft</td> <td></td> <td></td> </tr> </table>	Account Name	Entity Status			Acme Inc. (TEST)	Draft			<table style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 25%;">REQUIRE...</th> <th style="width: 25%;">FILE TYPE</th> <th style="width: 25%;">STATUS</th> <th style="width: 25%;">EXPIRATION ...</th> </tr> </thead> <tbody> <tr> <td>CAEAgre...</td> <td>CAEAgree...</td> <td>DocuSign P...</td> <td style="text-align: right;">▾</td> </tr> </tbody> </table>	REQUIRE...	FILE TYPE	STATUS	EXPIRATION ...	CAEAgre...	CAEAgree...	DocuSign P...	▾
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Parent Account	Program Type																
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Figure 3. Salesforce Communities showing which required documents have been received.

As shown in Figure 4, when each document is signed or uploaded, it is added to the Salesforce Communities record, the corresponding Salesforce record, and the **Notes & Attachments** section.

The screenshot shows a Salesforce record for 'Required Documentation CAEAgreement'. The record is titled 'Required Documentation CAEAgreement' and has buttons for 'Edit', 'Delete', and 'Clone'. The record details include:

- Required Doc Name:** CAEAgreement
- Entity:** [Redacted]
- File Type:** CAEAgreement
- File Details:** [Redacted]
- Status:** DocuSign Pending
- Expiration Date:** [Redacted]
- Analyst:** Analyst Assigned, Analyst Assigned Date, Analyst Comments
- DocuSign Related Fields:**
 - DocuSign Envelope Id:** 1A747C32-5E74-48E5-BD7B-A7746BDD7654
 - DocuSign Status:** Sent
 - DocuSign Sent:** 8/28/2017 3:29 PM
 - Completed:** [Redacted]
 - Created By:** [Redacted]
 - Last Modified By:** [Redacted]
 - Created:** 8/28/2017 3:29 PM
 - Last Modified:** 8/28/2017 3:31 PM
- Notes & Attachments (2):**
 - Envelope 1a747c32-5e74-48e5-bd7b-a7746bdd... (Aug 28, 2017 · Attachment)
 - Envelope 1a747c32-5e74-48e5-bd7b-a7746bdd... (Aug 28, 2017 · Attachment)
- Recipient Status (3+):**
 - William Chan:** DocuSign Re... [Redacted], DocuSign Ro... 4, Recipient St... Created
 - Molly:** DocuSign Re... [Redacted], DocuSign Ro... 3, Recipient St... Created
 - CSS Team:** DocuSign Re... [Redacted], DocuSign Ro... 2, Recipient St... Sent

Figure 4. Salesforce record showing received documents and application status.

Figure 4 contains detailed information that helps Covered California understand what the status of a given application is in the overall process. Some key points are that Figure 4 shows the overall DocuSign status as **Pending**, indicating that the review process is not yet complete. The **Notes & Attachments** section shows a list of all DocuSign documents that are complete (signed), as well as all uploaded documents. The **Recipient Status** section shows the status of each recipient's signature on the envelope. The recipients are listed in reverse signing order with the earliest recipient on the bottom and the most recent recipient on top. Each recipient will have a recipient status of **Created** until the envelope is routed to a given recipient. When the envelope is routed to a specific recipient, it will have a recipient status of **Sent** and when the recipient signs the agreement, it will show a recipient status of **Complete**. When all required recipients have signed the agreement, the overall **DocuSign Status** field is changed to **Complete** and the **Completed** field will reflect the corresponding date.

How It Works

To extend the functionality of DocuSign for Salesforce, an APEX API wrapper was created around the DocuSign eSignature API that is called when the entity clicks the custom button shown in Figure 1. Clicking the custom button initiates the agreement review process between Covered California and its entities.

The APEX code, shown in Figure 5, performs the following functions:

- Selects the correct template based on the criteria entered by the entity filling out the agreement.

- Calls the DocuSign API to **create the envelope** using the selected template ID. The template is pre-created by Covered California with the correct recipients and routing order, but some values are substituted at run-time based on user input into the various Salesforce Communities sections. The values include entity name, email address, etc. Standard DocuSign functionality handles the routing based on selected routing order.

- Checks DocuSign envelope status by implementing a **DocuSign Connect webhook**. This enables a custom web listener to receive notifications when any status change is made to an envelope. Therefore, the Salesforce status is updated when any recipient in the routing order signs the agreement, and also when the envelope status is complete (all recipients have signed).

- Checks whether additional required documentation has been uploaded. This is not a DocuSign piece, but is required as part of the overall process. When all required documentation has been uploaded and the agreement has been signed, Salesforce notifies Covered California so they can assign an analyst to review all documents.

```

1  public with sharing class DocuSignRecipient {
2
3
4
5
6
7
8
9  public static Map<String, String> processDocuSignView(Map<String, String> docuSignMap){
10
11
12  @AuraEnabled
13  public static Map<String, String> processDocuSignView(Map<String, String> docuSignMap){
14
15
16  System.debug('docuSignMap =====>'+docuSignMap);
17  User oCurrentUser = [select Id, Name, email, Title from User where id=:docuSignMap.get('userId')];
18  Map<String, String> mapToReturn = new Map<String, String>();
19  mapToReturn.put('msg', '');
20  mapToReturn.put('Error', '');
21  mapToReturn.put('URL', '');
22
23  string docuSign_template_id;
24  string signer_email = oCurrentUser_email;
25  string signer_name = oCurrentUser_Name;
26  string signer_title = oCurrentUser_Title;
27  string sender_return_url = docuSignMap.get('returnURL');
28  string signer_user_id = docuSignMap.get('userId');
29  string signer_roleName;
30  string envelopeId;
31  string viewURL;
32  string textTabsWithApiName;
33  string docuSignTempObj;
34
35  DocuSign_Setting__c DocuSignConfigSettings = DocuSign_Setting__c.getValues('DocuSignSetting');
36  if(DocuSignConfigSettings == null)
37  {
38  mapToReturn.put('Error', 'No DocuSign Settings Found');
39  return mapToReturn;
40  }
41
42  DocuSign_Template_Data__c DocuSignTempData = [select id, name, Object_API_Name__c, Role_Name__c, Template_Id__c, Text_Tabs_with_API_Name__c, Save_to_Object_API__c, Parent_Field_A
43  if(DocuSignTempData == null)
44  {
45  mapToReturn.put('Error', 'No DocuSign Template Found');
46  return mapToReturn;
47  }
48  Map<String, String> mapHeader = new Map<String, String>();
49

```

Figure 5. APEX code using Eclipse as the editor.

In only a matter of three weeks, the prototype was created, development was completed and the custom solution was rolled-out, with the DocuSign development piece taking only a little more than one week. They were able to find most of the resources they needed in the **DocuSign Developer Center**, but also consulted the DocuSign Professional Services team to learn best practices for integrating with Salesforce custom buttons.

An Excellent Prognosis

By using the eSignature API and DocuSign for Salesforce to create a custom solution that integrates with Salesforce Communities, Covered California now has an automated process for reviewing and approving agreements from the entities that provide Californians with access to ACA qualified health plans.

Agreements now move seamlessly through the approval process, which is trackable, secure, transparent, and 100 percent automated. If entities need to amend their information, the new solution is nimble enough to handle changes immediately. The time to process agreements has been reduced now that agreements don't need to be walked from one division to the next and information doesn't need to be manually keyed into spreadsheets. Covered California benefits from complete visibility into the work flow through the Salesforce dashboard and DocuSign. Now, Covered California can readily track where exactly agreements are in the approval process and which divisions still need to sign agreements. In addition to the highly efficient new process, Covered California is saving money and eliminating wasted resources of paper and ink. This efficiency saves time and money, while benefiting from enhanced services offered by Covered California.

You can try the power and flexibility of the DocuSign eSignature API for yourself with a free developer sandbox – just visit the [DocuSign Developer Center](#), and see for yourself why Covered California chose the DocuSign API.

About DocuSign

DocuSign helps organizations connect and automate how they prepare, sign, act on, and manage agreements. As part of the DocuSign Agreement Cloud, DocuSign offers eSignature: the world's #1 way to sign electronically on practically any device, from almost anywhere, at any time. Today, more than 537,000 customers and hundreds of millions of users in over 180 countries use DocuSign to accelerate the process of doing business and to simplify people's lives.

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