

Healthcare Benefit Trust eSignature DocuSign User Guide

May 2022

DocuSign landing page

Clicking the [DocuSign version](#) URL link of the forms located in the Healthcare Benefit Trust website will direct you to the landing page below.

The screenshot shows a web form titled "PowerForm Signer Information". It contains the following elements:

- A text input field with the placeholder text "(Name of the form)".
- A paragraph of text: "Please enter your name and email to begin the signing process."
- A dropdown menu labeled "Signee -" with the placeholder text "(Employee, Employer or Physician)".
- A label "Your Name: *" followed by a text input field with the placeholder text "Full Name".
- A label "Your Email: *" followed by a text input field with the placeholder text "Email Address".
- A blue button at the bottom with the text "BEGIN SIGNING".

To begin the signing process, enter the following:

1. Enter your **Full Name**
2. Enter your **Email Address** (Ensure email address is entered correctly. This is utilized by DocuSign to send email notification for incomplete documents.)

Document Signing Process

1. **Important:** Please read the [Electronic Record and Signature Disclosure](#).

You will find the link to the Disclosure in the Signing page like the image below.

Please Review & Act on These Documents

 **Healthcare Benefit Trust**
Healthcare Benefit Trust

 Please read the [Electronic Record and Signature Disclosure](#).

I agree to use electronic records and signatures.

Employee

2. After reading the Electronic Record and Signature Disclosure, put a check in **Agree on Electronic Record and Signature Disclosure**, then click **Continue**.

 Please read the [Electronic Record and Signature Disclosure](#).

I agree to use electronic records and signatures.

Note: This form is also to be used for full-time community health workers) u

Attach a copy of the back-up documen

Employee

3. **Fill out** and enter all necessary fields required in the form.

4. Click the **Sign** icon. **Note:** Use either of the 2 options below for your Signature.
- a. Option 1 select **DRAW** – create a freehand drawing of your signature by using your cursor or stylus pen. Click **ADOPT AND SIGN** once finished.

Adopt Your Signature [Close]

Confirm your name, initials, and signature.

* Required

Full Name* **Initials***

SELECT STYLE **DRAW** UPLOAD

DRAW YOUR SIGNATURE [Clear](#)

 [Red arrow pointing to signature]

By selecting Adopt and Sign, I agree that the signature and initials will be the electronic representation of my signature and initials for all purposes when I (or my agent) use them on documents, including legally binding contracts - just the same as a pen-and-paper signature or initial.

ADOPT AND SIGN CANCEL

- b. Option 2 select **UPLOAD** – upload your own signature image file by clicking **UPLOAD YOUR SIGNATURE** button and locating the image file on your device. Click **ADOPT AND SIGN** once completed.

Adopt Your Signature [Close]

Confirm your name, initials, and signature.

* Required

Full Name* **Initials***

SELECT STYLE DRAW **UPLOAD**

PREVIEW

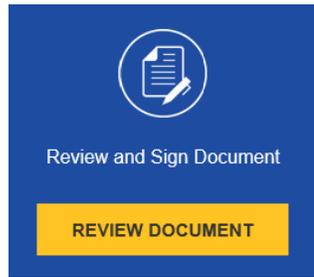
UPLOAD YOUR SIGNATURE [Red arrow pointing to button]

For best results use an image that is 400 x 145 pixels

By selecting Adopt and Sign, I agree that the signature and initials will be the electronic representation of my signature and initials for all purposes when I (or my agent) use them on documents, including legally binding contracts - just the same as a pen-and-paper signature or initial.

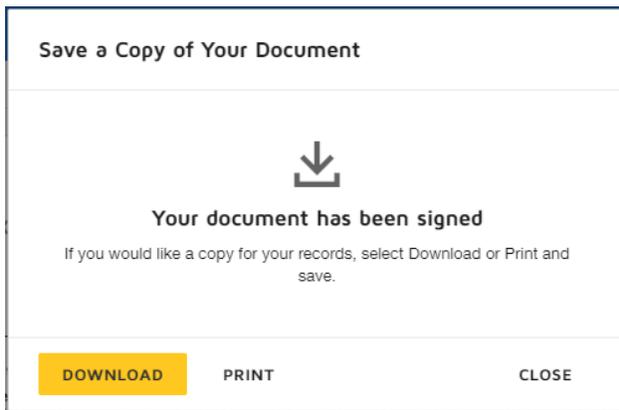
ADOPT AND SIGN CANCEL

5. Clicking **FINISH LATER** button at the top of the page allows you to save the document at its current state with all data entered and mark it pending for completion. This step will trigger an email notification to the email provided in the DocuSign landing page.



Click **REVIEW DOCUMENT** link in the email to continue signing the incompletd form. Click **FINISH** to complete the Signing process.

6. Click **DOWNLOAD** to save a copy of the completed signed form for your records on your device. Click **PRINT** if you would like to see the preview of the document. **Reminder:** Email completed forms to the respective offices.



7. Click **LEAVE** if promoted to proceed to the preview page. Note the additional options available in the preview page.



- a. Click Icon pointed by RED ARROW to download a copy of the completed signed form.
b. Click Icon pointed by GREEN ARROW to print the document.

Important Notes:

- Email completed forms to the respective offices.
- **Clear Data** button located at the bottom of the forms are not functional.