

AP Connect — Tips on Viewing Your GMA

March 2020

No DocuSign account needed to view your GMA on AP Connect!

Team members in your producer house who are working on new and renewing business now are able to view the accompanying group master application on [AP Connect](#) — no DocuSign account required!

To view a group master application (GMA) in AP Connect, click on “Tasks” in the top menu:



To find a GMA that is **in progress**, click the filter arrow underneath “Plan Term Subjectivities,” then select “In Progress (Renewal).” To view the DocuSign status for **new business**, select “In Progress (New Business)”:



All Mandatory and Optional Tasks for each group’s specific trust will be displayed:

NAME ↑	SUBJECTIVITY	EFFECTIV...	TRUST	TYPE	REQUIREM...	COMPLE...
1 Test Company ABC 123-2020-1	Group Master Application	11/1/2020	Kaiser Permanente Small Group Products	Renewal	Mandatory	<input type="checkbox"/>
2 Test Company ABC 123-2020-2	Proof of Affinity Partnership	11/1/2020	Kaiser Permanente Small Group Products	Renewal	Mandatory	<input type="checkbox"/>
3 Test Company ABC 123-2020-4	Renewal Proposal	11/1/2020	Kaiser Permanente Small Group Products	Renewal	Optional	<input type="checkbox"/>
4 Test Company ABC 123-2020-7	EOB for Employee Credit Deductibles	11/1/2020	Kaiser Permanente Small Group Products	Renewal	Optional	<input type="checkbox"/>

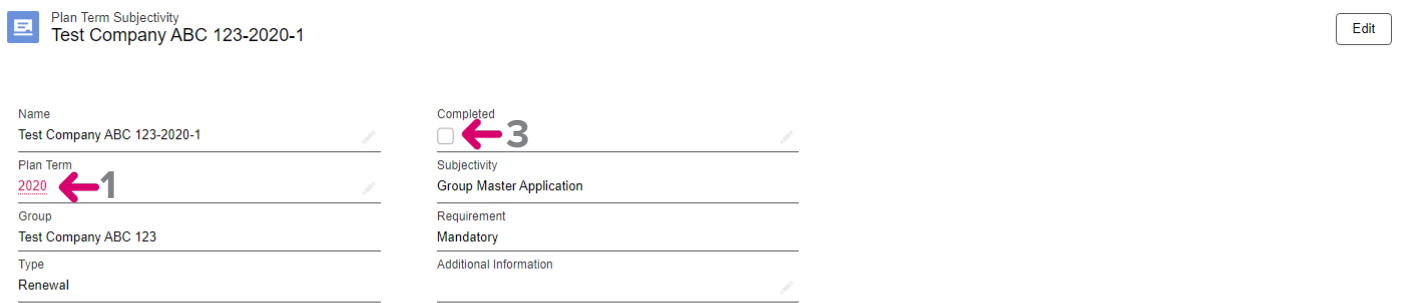
To view the current DocuSign Status, click the “Name” of the “Group Master Application” Subjectivity. In the above example, the name is “Test Company ABC 123-2020-1.”

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On the below screen, you have several options:

1. View the DocuSign by clicking the Plan Term: In this example, “2020.”
2. Upload a paper copy of the GMA by clicking the “Upload Files” button on the bottom of the page.
3. Mark the Task as “Completed” after everyone has signed the GMA, either by DocuSign or via paper.



Plan Term Subjectivity
Test Company ABC 123-2020-1 Edit

Name Test Company ABC 123-2020-1	Completed <input type="checkbox"/> 3
Plan Term 2020	Subjectivity Group Master Application
Group Test Company ABC 123	Requirement Mandatory
Type Renewal	Additional Information

Notes & Attachments (0) Upload Files

Upload Files Or drop files

If you click on the Plan Term link (shown above as “2020”), you will see the following page:

DocuSign Tasks New

ENVELOPE#	SENDER	SUBJECT	ENVELOPE STATUS
DSX-0003635	AP Connect	Business Health Trust - Kaiser Permanente Small Gro...	Sent

Click the link underneath the “Envelope#” category to view the signers of the GMA and their current status:

Auto responded = Bad Email address

Sent = Sent to the user to Sign

Complete = GMA marked at Finished for that user

Void = DocuSign was voided


DocuSign Recipient Status (3) New

DOCUSIGN RECIPIENT NAME	DOCUSIGN RECIPIENT EMAIL	DOCUSIGN ROUTING ORDER	RECIPIENT STATUS
Brendan Steiger (Test)	brendansteiger@mac.com	1	AutoResponded
Tommy Johnson	tommy.johnson@nothing.com	2	Created
Freddy Krueger	thomas.waller@advprofessionals.com	3	Created

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By clicking on the “DocuSign Recipient Name,” you can view when it was “sent,” “delivered” or “completed”:

 DocuSign Recipient Status
Brendan Steiger (Test)

DocuSign Status Record DSX-0003610	DocuSign Recipient Id 1CD7AF20-8630-4A48-8636-204CCCC7BC10
DocuSign Recipient Name Brendan Steiger (Test)	Envelope Id 0DA11735-51BC-46E8-84A2-8A42C3C82FFC
DocuSign Recipient Title	Date Sent 10/7/2019 11:44 PM
DocuSign Recipient Company	Date Delivered
DocuSign Recipient Email brendansteiger@mac.com	Date Signed
Recipient Status AutoResponded	Date Declined
DocuSign Routing Order 1	Declined Reason
	Declined Reason Extended

▼ Related Objects

Account
Contact Brendan Steiger (Test)
Lead
Created By  Greg Mogavero , 10/7/2019 11:45 PM
Last Modified By  Greg Mogavero , 10/7/2019 11:45 PM

Still Have Questions?

Email APConnect@advprofessionals.com or contact the training manager at Advanced Professionals:

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