# Coordinator Module
**Quick Reference Guide**

## *myGICLink* Transformation Project

The GIC is in the midst of a significant modernization effort that will transform the agency from a heavily paper-based operation to an on-line, future driven organization.

We are adding Customer Relationship Management (CRM) and electronic signature (eSign) tools through Salesforce and DocuSign. We are calling these new capabilities *myGICLink* which is "Your link to exceptional member benefits!"

*myGICLink* will streamline the benefit enrollment and benefit change processes. New functionalities will include the ability to sign documents online, improved record management, and faster customer service and response times.

## Form Requests

There are three ways Forms can be requested and submitted

- **Member -** Member submits a request for Form(s) on Mass.gov
- **Coordinator -** Coordinator submits a request for Form(s) on behalf of a Member from MAGIC
- **Paper-Based -** Member completes a paper Form manually and mails to GIC's scanning vendor (GIC, PO Box 556, Randolph, MA 02368

In this Quick Reference Guide, we will be reviewing the Member Request Process and the Coordinator Request Process.

## DocuSign - Member Request Process

As you review the Process Flows, here are some tips to understanding the flows:

- **Green -** Actions completed by the **MEMBER**
- **Light Blue -** Actions completed by the **COORDINATOR**
- **Gold -** Decision the system makes to determine the next steps
- **Purple -** Background actions being performed by **DocuSign**
- **Dark Blue -** Background actions being performed by **Salesforce,** GIC's new CRM

**DocuSign - Member Request Process -** Member submits a Form via Mass.gov
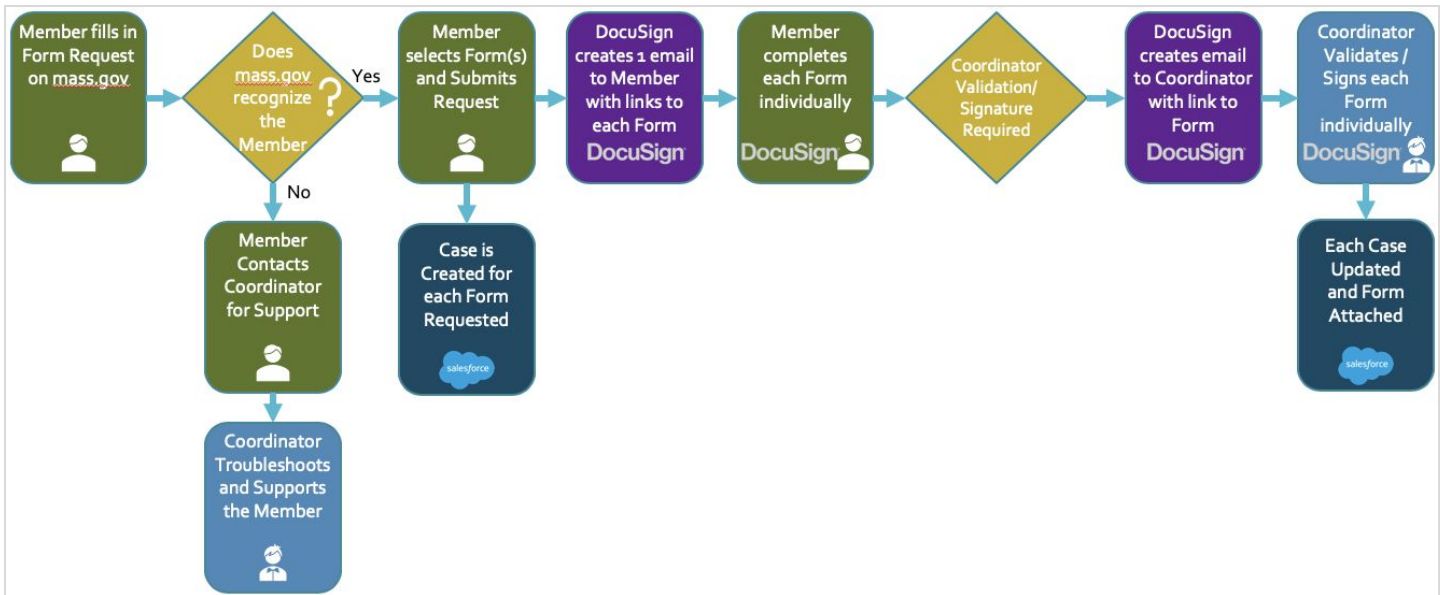


**Process Flow**

1. The Member accesses the GIC website and completes a Form Request with the following information:
   ○ email address
   ○ birthdate



2. The system checks to see if a Member's information matches the email and birthdate in myGICLink.

- ○ If the Member is not found in the system, or if the Member used an Email address that does not match the system, the User is prompted on the Website to reach out to the Coordinator for assistance.
- ○ The Coordinator will then search for the Member in MAGIC. If the Member does not exist, the Coordinator will need to start the process of populating the fields for a Form Request in the MAGIC portal.

3. If a Member is found, then the Form Request web page will be prepopulated with the Agency Name and Coordinator information. The Member will select their desired GIC Enrollment Form(s) from a dropdown list. Once the Member selects the desired Form(s), they click the **REQUEST** button.

Member Email *ⓘ

debra.engels@mtxb2b.com

Member Date Of Birth *ⓘ

Jul 9, 1978

Agency *

DEPT OF WORKFORCE DEVELOPMENT

Coordinator *

Steven Henkel

Click here if this is no longer your Agency.

Choose Form *ⓘ

Enrollment/Change - Form 1  ✕    Employment/Change - Form 1A  ✕

RESET        REQUEST

4. The Member will receive ONE email with links to the requested GIC Forms via DocuSign.

5. The Member will complete and submit each Form electronically with the required information and provide digital signatures.

6. At this point, the Form submitted by the Member requires review and signature from the Coordinator.

7. DocuSign will create an email to the Coordinator with a link to the Form.

8. The Coordinator will review and/or sign each Form individually and submit.

9. Upon submission GIC will have instant access to the member's enrollment forms in myGICLink.

## DocuSign - Coordinator Request Process

**DocuSign - Coordinator Request Process -** Coordinator requests GIC Enrollment Forms on the Member's behalf
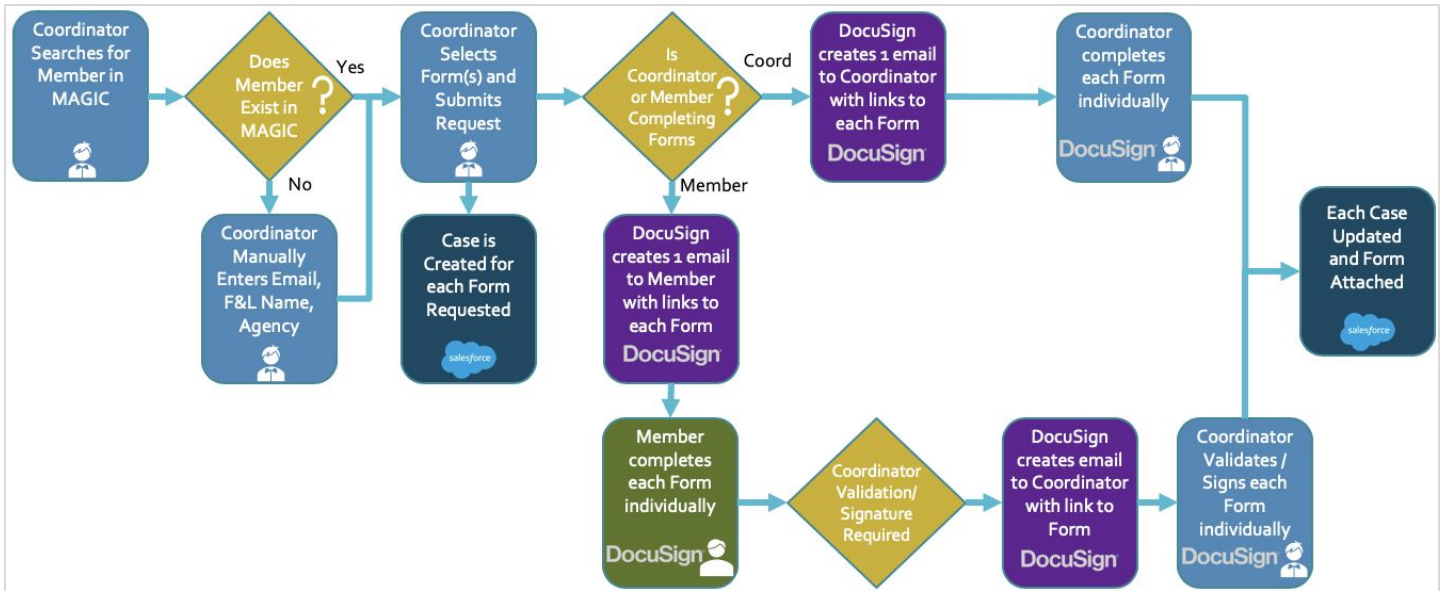


1. First, the Coordinator will access MAGIC and search for the Member.

2. Does the Member exist in MAGIC?

   2a. If the Member does NOT exist in MAGIC, the Coordinator will navigate to the MAGIC Home Page and click the *myGICLink* from the Home Page. The Coordinator will manually enter First Name, Last Name, Email, Member Date of Birth, and Agency.

3. If the Member DOES exist in MAGIC, the Coordinator will open the Member Record and click the *myGICLink* link. In the background, the system is pulling the email, Member Name, and Agency from the Member Record in MAGIC. The Coordinator will then select the desired Form(s).



4. At this point the Coordinator can choose to bypass the Member. If the Coordinator is completing the GIC Forms and the member's signature is not required, click the **Coordinator Only** checkbox. If the Member will be completing the Forms and is required to sign, leave the checkbox blank.
   ○ Clicking the **Flexible Spending Instructions** will include Flexible Spending instructions with the email to the Member. *Please Note -* Municipal employees are not eligible for this benefit, so Municipal Coordinators will never click this checkbox.

   When you are ready to submit the Request, click the **Request** button.

**Coordinator sends GIC Forms to Member**

5. The Member will receive ONE email with links to the requested GIC Forms via DocuSign.

6. The Member will complete and submit each Form electronically with the required information and provide digital signatures.

7. At this point, the Form submitted by the Member requires review and signature from the Coordinator.

8. DocuSign will create an email to the Coordinator with a link to the Form.

9. The Coordinator will review and/or sign each Form individually and submit.

10. Upon submission GIC will have instant access to the member's enrollment forms in myGICLink.

**Coordinator Completes Forms (Coordinator Only Checkbox selected)**

5a.. The Coordinator will receive ONE email with links to the requested GIC Forms via DocuSign.

6a. The Coordinator will complete and submit each Form electronically with the required information and provide a digital signature.

10. Upon submission GIC will have instant access to the member's enrollment forms in myGICLink.

## Helpful Hints | Tips & Tricks | Where to Get Help

- If a Member has submitted their Form via DocuSign and forgets to attach any supporting documents, contact the Member directly and ask them to bring the documents or email them to you and you will upload to the DocuSign Form. Once the Member submits the DocuSign Form, they will longer have access to edit or attach any documents.

- DocuSign will send emails throughout the submission process to both the Member and the Coordinator to keep you updated on the progress.

- Before you or the Member closes the DocuSign Form, you can download the Form or print the Form for future reference.

- If you launch the Request Form from the *myGICLink* on the Home Page, no information will be pre-populated. Launch the *myGICLink* from the Member Record to pre-populate the fields and save time!

**QUESTIONS?**

**Send an email to myGICLink@mass.gov**