Standard Operating Procedure (SOP)
Processing BAA for New Business

Purpose:
This SOP outlines the process for processing Business Associate Agreements (BAA) for new business clients using DocuSign, including steps for both signed and non-signed BAAs.

Scope
This SOP applies to **Account Managers** who write new business and are responsible for processing BAAs for their new business clients. It includes the procedures for initiating a BAA using DocuSign, sending it to clients, and following up based on whether the client signs the BAA.

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1. Log into DocuSign

- Log in to **DocuSign** using your personal account credentials.

2. Navigate to Templates

- In the DocuSign dashboard, click on **"Templates"** in the top left corner of the screen.
- On the left-hand side of the screen, click on **"Shared with Me"** to view available templates.

3. Select the Appropriate Template

- Locate and click on **"ADS New Business & Existing Customer BAA"** template.
- Click on **"Use"** to initiate the document.

4. Complete Client Information

- Fill in the following required fields:
    - **Client Name**
    - **Email**
    - **Company Name**
- All other fields are pre-set and do not need to be modified.

5. Send the BAA

- Once all required fields are completed, click **"Send"** to send the BAA to the client for signing.

6. If the Client Signs the BAA

- If the client signs the BAA, follow **Steps 2-4** of the Processing Signed BAAs SOP.

7. If the Client Does Not Sign the BAA Within 30 Days

- If the client does not sign the BAA within 30 days, follow **Steps 2-5** of the Processing Non-Signed BAAs SOP.

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