

# Standard Operating Procedure (SOP)

## Processing Non-Signed BAAs (After 30 Days)

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### Purpose:

This SOP provides the step-by-step process for handling non-signed Business Associate Agreements (BAAs) and sending affirmation language to clients after 30 days have passed since the original DocuSign was sent.

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### Scope:

This SOP applies to Account Managers responsible for processing non-signed BAAs.

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### Procedure:

#### 1. Identify Non-Signed BAAs

- Review your open activities by navigating to the **Epic Dashboard** or the **Open BAA's Report folder** to identify groups that have not yet signed their BAA.

#### 2. Send BAA Affirmation Email

- After 30 days from the original DocuSign, email the client the affirmation language that the BAA is now in effect. [Link to Template for Email:](#)
  - Copy / Paste template into a new email to the client utilizing the Subject Line:  
**[Insert Group Name] - Business Associate Agreement – Terms and Conditions**

#### 3. Forward the Email to Paralegal Contact

- After sending the email to the client, **forward the email** to the designated **Paralegal Contact**:
  - **Kyla Veitenheimer**, Paralegal Contact: [KMVeitenheimer@acrisure.com](mailto:KMVeitenheimer@acrisure.com)  
and  
**BAA Submission Inbox**: [841394@acrisure.app.onit.com](mailto:841394@acrisure.app.onit.com)

#### 4. Attach forwarded Email in Epic

- Navigate to the **group's Epic account**.
- Attach the **email you forwarded** to:  
**Benefits** folder → **Group Info** sub-folder
- Update the **Attachment Description** to:  
**ADS EB BAA Affirmation 2025**

#### 5. Close the BAA Activity in Epic

- Go to the **Activities tab** in the group's Epic account.
- Locate and open the activity with the description:  
**ADS EB BAA**
- If no open activity is found:
  - Check **closed activities**.
  - If no BAA activity exists, follow the SOP titled [Adding BAA Activities in Epic](#) before proceeding.
- Once the activity is open:
  - **Close** the activity.
  - Mark it as **Successful**.
  - In the **notes section**, document the following:  
"Sent client BAA Affirmation and forwarded to Paralegal Contact: Kyla Veitenheimer at [KMVeitenheimer@acrisure.com](mailto:KMVeitenheimer@acrisure.com) and [841394@acrisure.app.onit.com](mailto:841394@acrisure.app.onit.com) and attached in Epic."