Purpose
To ensure signed Business Associate Agreements (BAAs) are properly forwarded, documented, and closed in Epic in compliance with internal procedures.

Scope
This SOP applies to team members responsible for processing executed BAAs received via DocuSign in the BAA Inbox.

Procedure

1. Identify Assigned Groups
- Review the **BAA Inbox**.
- Use the **color code assigned to your name** to determine which group(s) you are responsible for processing.

2. Forward the Executed BAA
- Forward the executed DocuSign document to:
  - **Kyla Veitenheimer**, Paralegal Contact: KMVeitenheimer@acrisure.com
    and
    BAA Submission Inbox: 841394@acrisure.app.onit.com
  - **Enter** the **Group's Name in the subject line replacing [Account Name]**
  - **Send** from the **BAA Inquiries Inbox** as the "**From**" and **delete your signature** from the draft before sending.

3. Attach Forwarded Email in Epic
- Navigate to the **group's Epic account**.
- Attach the **email you forwarded** (located in your personal sent folder) to:
  Benefits folder → **Group Info** sub-folder
- Update the **Attachment Description** to:
  ADS EB SIGNED BAA 2025

4. 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:
    "Forwarded Signed BAA to Paralegal Contact: Kyla Veitenheimer at KMVeitenheimer@acrisure.com and 841394@acrisure.app.onit.com and attached in Epic."

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