

Docusign District Administrator Help Sheet

Updated: April 8, 2026

Adding users

To add users to the APD-Medicaid Services and Support account

1. Click on Admin tab at the top of the screen.
2. Go to the Users and Groups on the left menu bar and click Users.
3. Select Add User at the top of the page.
4. Add their email address and click Next.
5. Add their full name and click Next.
6. Select DS Sender under Permission Profile and the district group under Groups then select Add User. For users to access APD-Medicaid Services and Supports templates, they will need to be added to their district group. [Access the support guide.](#)

Closing users

Make sure to close users if they are no longer with the agency. AAA staff need to be removed within 24 hours. [Access the support guide.](#)

Switching accounts

If the case manager (CM) is part of multiple Docusign accounts, they may need to switch accounts to see their envelopes sent and access Medicaid Services and

Supports templates. If the CM will mainly be working out of the Medicaid Services and Supports account, they can set the account to default in their preferences section by clicking on their initials or photo in the top right corner.

[Access the support guide.](#)

Shared access

This guide shows you how to set up shared access between two users and what level of access should be given. Always use “Shared Access for Sending”. [Access the support guide.](#)

Envelope custody transfer

This guide shows you how to transfer envelopes from one user to another. This may need to be used if a CM leaves ODHS or AAA and you need someone else to take on their in-flight envelopes. [Access the support guide.](#)

You can get this document in other languages, large print, braille or a format you prefer free of charge. Contact ODHS at apd.ltss@odhs.oregon.gov or 503-945- 5811. We accept all relay calls.



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