

DocuSign-Guide for ICP Employee Provider Information Form

Version: May 8, 2025

Table of Contents

Note: Select any of the content links to jump to that section

[ICP Employee Provider Information Overview](#)

[Accessing ICP Forms Package Templates](#)

[ICP Employee Provider Information Form Process Case Manager](#)

[Managing DocuSign Envelopes](#)

Appendix

[Guides from DocuSign Support](#)

[Training and Support Sites](#)

[Support Resources](#)

Independent Choices Program (ICP) Employee Provider Information Overview

ICP Employee Provider Information Overview

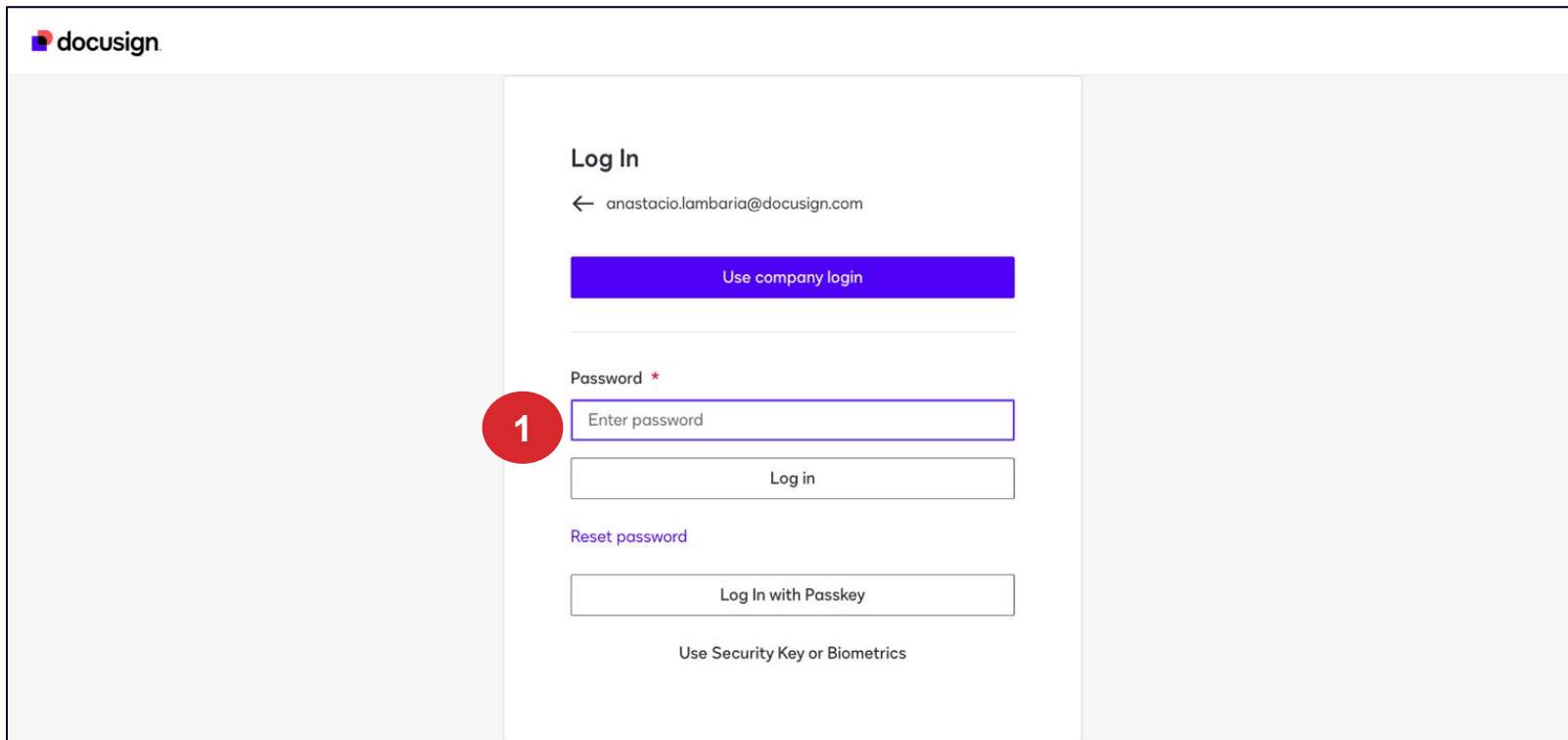
The ICP Employee Provider Information form is utilized to capture the ICP Participant details, capture the Case Manager (CM) Details, and then capture the Employee Details. The form is also set up to only show the details for each employee to each employee. The participant has visibility to the entire form.

The ICP Employee Provider Form includes the following forms:

- ICP Employee Provider Form including signatures
- A summary form for employee 1
- A summary form for employee 2

Accessing the ICP Employee Provider Information Form

Log into DocuSign using your user email and password (one-1) at account.docusign.com.



The screenshot shows the DocuSign login interface. At the top left is the DocuSign logo. The main heading is "Log In". Below it, the email address "anastacio.lambaria@docusign.com" is displayed with a back arrow. A blue button labeled "Use company login" is present. A horizontal line separates this from the password section. The label "Password *" is followed by a text input field containing the placeholder "Enter password". A red circle with the number "1" is positioned to the left of this input field. Below the password field is a "Log in" button. A link for "Reset password" is shown in blue text. Below that is a "Log In with Passkey" button. At the bottom, the text "Use Security Key or Biometrics" is displayed.

Confirm that you are in the APD-Medicaid Services and Supports - Production account (one-1). If not, select your profile icon in the top right hand corner and switch accounts (two-2).

The screenshot displays the Docusign user interface. At the top, a navigation bar includes the Docusign logo and tabs for Home, Agreements, Templates, Reports, and Admin. On the right side of the navigation bar, there is a help icon, the Oregon Department of Human Services logo, and a user profile icon. A red circle with the number '1' highlights the user profile icon. Below the navigation bar, a dark blue header bar shows the current account: 'APD - Medicaid Services and Supports - Production'. Below this, a 'Welcome back' section features the user's name 'Alex Lambaria' and a profile picture. To the right of the welcome section, four metrics are displayed: 'Last 6 Months', 'Action Required' (0), 'Waiting for Others' (0), 'Expiring Soon' (0), and 'Completed' (0). A red circle with the number '2' highlights the 'Completed' metric. Below the metrics, a large dashed box contains the text 'Sign or get signatures' and an orange 'Start' button. On the right side of the interface, a dropdown menu is open, showing the user's name 'Alex Lambaria', email 'anastacio.lambaria@docusign.com', account number '#28971343', and account name 'APD- Medicaid Services and Supports - ...'. The dropdown menu includes options for 'Manage Profile', 'Switch Account' (highlighted with a red circle), 'My Preferences', and 'Log Out'.

1

APD - Medicaid Services and Supports - Production

Welcome back

Alex Lambaria

Last 6 Months

0

Action Required

0

Waiting for Others

0

Expiring Soon

0

Completed

2

Sign or get signatures

Start

Alex Lambaria
anastacio.lambaria@docusign.com
Account #28971343
APD- Medicaid Services and Supports - ...

Manage Profile

Switch Account

My Preferences

Log Out

Select the Start button (one-1).

docusign

Home

Agreements

Templates

Reports

Admin

Oregon Department of Human Services

docusign

1

APD - Medicaid Services and Supports - Production

Welcome back

Alex Lambania

Last 6 Months

0

Action Required

0

Waiting for Others

0

Expiring Soon

0

Completed

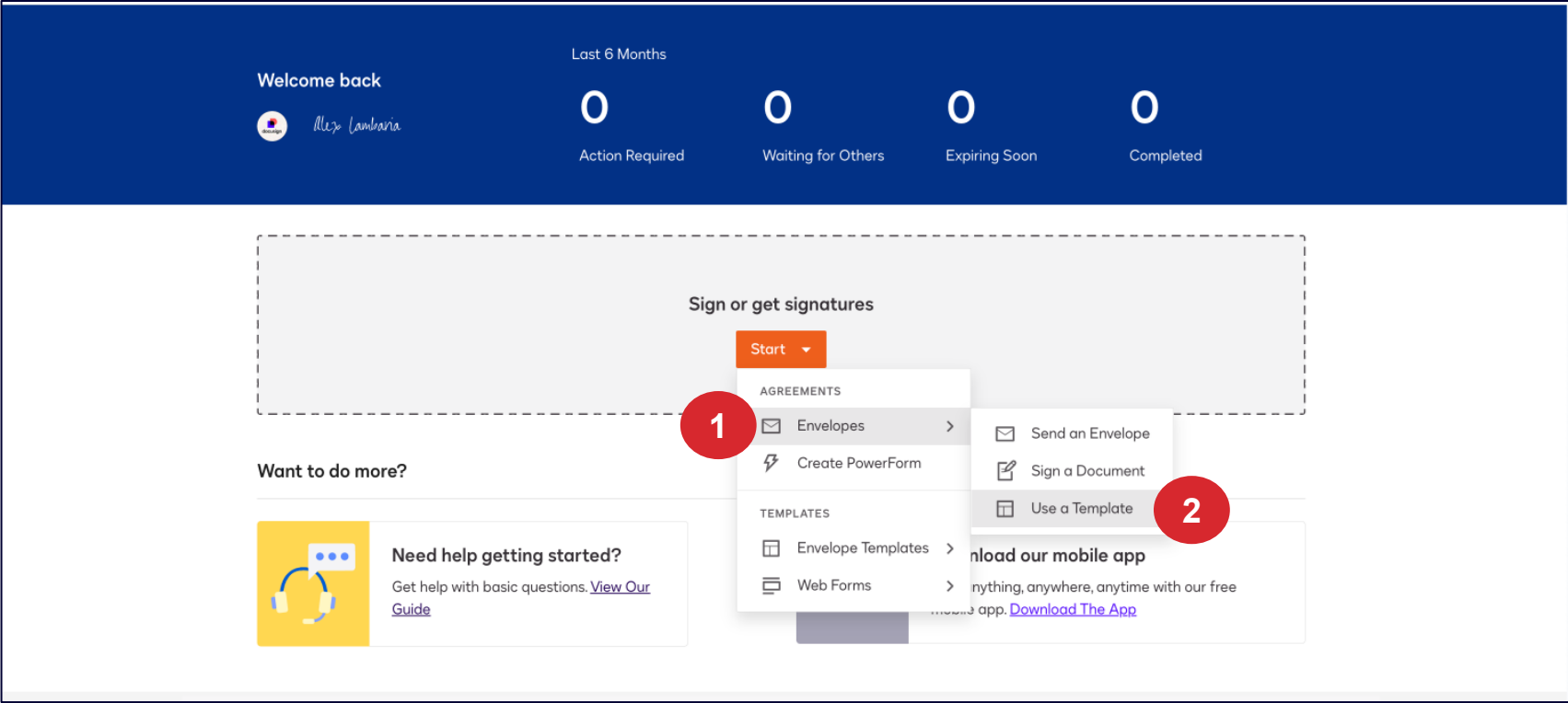
Sign or get signatures

1

Start

Want to do more?

Select Envelopes (one-1) then use a Template (two-2). You will be taken to a template selection screen.



On the template selection screen, select All Templates (one-1) or the ICP Forms (two-2) folder within the Shared Folders. Or you can use the search feature (three-3), but this requires you be in the All Templates when searching.

Select a template

My Templates

Shared with Me

All Templates

Favorites

Folders

Shared Folders

ARCHIVED

ICP Forms

OPI-M Application Forms

Stand Alone Forms

Template Tests

Search All Templates

NAME

OWNER

LAST CHANGE

(DTC-WIP) 3010 Authorization for Disclosure, Sharing and Use of Individual Information

Alex Lambaria

3/20/2025 | 9:55:36 AM

2023 Version ICP Employee Provider(s) Information (2 employees)(v2)

Wayne Sneag

3/19/2025 | 3:36:26 PM

2023 Version ICP Employee Provider(s) Information (2 employees)

Wayne Sneag

3/12/2025 | 2:50:56 PM

Workers' Compensation Consent and Agreement [v.3.13.25]

Alex Lambaria

3/10/2025 | 2:10:26 PM

Independent Choices Representative Agreement [v.3.13.25]

Alex Lambaria

3/10/2025 | 2:07:14 PM

ICP Budget Worksheet [v.3.13.25]

Wayne Sneag

3/10/2025 | 1:29:44 PM

Request for Direct Deposit - Independent Choice Program [v.3.13.25]

Alex Lambaria

3/10/2025 | 1:29:23 PM

Independent Choices Participation Agreement [v.3.13.25]

Alex Lambaria

3/10/2025 | 1:29:06 PM

ICP Forms Package [v.3.13.25]

Wayne Sneag

3/10/2025 | 1:28:49 PM

[Archived] 2023 Version ICP Employee Provider(s) Information

Alex Lambaria

3/10/2025 | 1:25:16 PM

Add Selected

 docusign

Docusign Confidential

[Table of Contents](#)

10

Select the ICP Employee Provider Form (one-1) and then select Add Selected (two-2).

Select a template

My Templates
Shared with Me
All Templates
Favorites
Folders
Shared Folders
ARCHIVED
ICP Forms
OPI-M Application Forms
Stand Alone Forms
Template Tests

Search All Templates

NAME	OWNER	LAST CHANGE
☐ (DTC-WIP) 3010 Authorization for Disclosure, Sharing and Use of Individual Information	Alex Lambaria	3/20/2025 9:55:36 AM
☒ **2023 Version ICP Employee Provider(s) Information (2 employees)**(v2)	Wayne Sneag	3/19/2025 3:36:26 PM
☐ **2023 Version ICP Employee Provider(s) Information (2 employees)**	Wayne Sneag	3/12/2025 2:50:56 PM
☐ Workers' Compensation Consent and Agreement [v.3.13.25]	Alex Lambaria	3/10/2025 2:10:26 PM
☐ Independent Choices Representative Agreement [v.3.13.25]	Alex Lambaria	3/10/2025 2:07:14 PM
☐ ICP Budget Worksheet [v.3.13.25]	Wayne Sneag	3/10/2025 1:29:44 PM
☐ Request for Direct Deposit - Independent Choice Program [v.3.13.25]	Alex Lambaria	3/10/2025 1:29:23 PM
☐ Independent Choices Participation Agreement [v.3.13.25]	Alex Lambaria	3/10/2025 1:29:06 PM
☐ ICP Forms Package [v.3.13.25]	Wayne Sneag	3/10/2025 1:28:49 PM
☐ [Archived] 2023 Version ICP Employee Provider(s) Information	Alex Lambaria	3/10/2025 1:25:16 PM

Add Selected

ICP Employee Provider Information Form Process - Case Manager (CM)

Docusign works best if you think about working top-to-bottom; left-to-right.

Add documents

ICP_Employee_Provi...
4 pages
1 Template Applied

ICP_Employee_Provi...
1 page

Employee 1
1 page

Employee 1 Tasks
1 page

Employee 2
1 page

Employee 2 Tasks
1 page

Drop your files here or

Upload +

Add recipients

Some of the recipients are locked and cannot be changed
[Learn More.](#)

☒ Set signing order [View](#)

Participant	Needs to Sign	Customize
20 Name * Delivery * ☒ Email ☐ SMS (Text) Email * + Phone number	☐	☐
30 Name * Delivery * ☒ Email ☐ SMS (Text) Email *	☐	☐

This template can be used if there are either one or two employees included for the participant. Either way, DO NOT delete anything from this initial section.

2023 Version ICP Employee Provider(s) Information (2 employees)(v2)

Add documents

ICP_Employee_Provid...
4 pages

View

ICP_Employee_Provid...
1 page

Employee 1
1 page

Employee 1 Tasks
1 page

Employee 2
1 page

Employee 2 Tasks
1 page

Drop your files here or

Upload

Note: If there is only one employee included, you will not need to remove the forms from this section.

 docusign

Docusign Confidential

[Table of Contents](#)

14

Enter the Name and Email for both the Participant and the Employee 1 (one-1). If there is an Employee 2 (two-2), enter their Name and Email.

The screenshot displays three participant configuration forms in the DocuSign interface. Each form includes a title bar with a pencil icon, the text 'Needs to Sign', and a 'Customize' dropdown. The forms are as follows:

- Participant:** The title 'Participant' is highlighted with a red circle containing the number 1. The form contains a 'Name' field with a red asterisk, a 'Delivery' section with a checked 'Email' checkbox and an unchecked 'SMS (Text)' checkbox, and an 'Email' field with a red asterisk. A 'Phone number' field is visible at the bottom.
- Employee 1:** The title 'Employee 1' is highlighted with a red circle containing the number 1. The form structure is identical to the Participant form.
- Employee 2:** The title 'Employee 2' is highlighted with a red circle containing the number 2. The form structure is identical to the others, but it is enclosed in a dashed red border.

If there is NOT an Employee 2 (two-2), you can delete them from the workflow (three-3). You will be asked to confirm the deletion of their assigned fields as shown (four-4).

Participant

Name *

Delivery *

☒ Email ☐ SMS (Text)

Email *

+1 Phone number

1

Employee 1

Name *

Delivery *

☒ Email ☐ SMS (Text)

Email *

+1 Phone number

1

Employee 2

Name *

Delivery *

☒ Email ☐ SMS (Text)

Email *

+1 Phone number

2

Employee 2

Name *

Delivery *

☒ Email ☐ SMS (Text)

Email *

+1 Phone number

Needs to Sign

Customize

3

Note: When you click the trash can (three-3), a message will appear confirming deletion and fields assigned to Employee 2. You can confirm by selecting Delete.

Recipient has fields

This recipient has 18 assigned fields. By deleting this recipient, you will also delete their fields. Would you like to delete the recipient and fields?

4

Cancel

Delete

Under envelope custom fields, enter the Consumer First and Last Name (one-1) and Consumer Initials (two-2). This information is used to merge the Consumer's initials into the email subject line. Then select Next (three-3).

×

[[Participant_UserName]]. Please DocuSign: ICP Employee Provider(s) Information

?

Advanced Options

+1

Phone number

⌵ Add Recipient

+ Add Delay

Add envelope custom fields

^

1 Consumer First and Last Name *

2 Consumer Initials *

Characters remaining: 100

Characters remaining: 100

Add message

^

☒ Custom email and language for each recipient

To: Participant

Email Language *

English (US)

Email Subject *

[[Participant_UserName]]. Please DocuSign: ICP Employee Provider(s) Information

Characters remaining: 21

3

Next

As the CM, you will now be able to complete sections of the form.

Wayne Sneag

Search Fields

Standard Fields

- Signature
- Initial
- Date Signed
- Name
- Email
- Company
- Title
- Text
- Number
- Checkbox
- Dropdown
- Radio
- Payment Item
- Drawing
- Formula

Documents

ICP_Employee_Provide

Pages: 4

Oregon Department of Human Services
AGING & PEOPLE WITH DISABILITIES

**Independent Choices Program (ICP)
Employee Provider(s) Information**

For Addresses, Select Mailing or Physical Address checkbox; or Both checkboxes if different

ICP participant profile

Name: Text Date of birth: Text

☐ Mailing address: Text

City: Text State: Select Zip: Text

☐ Physical address: Text

City: Text State: Select Zip: Text

Participant phone #: Text Participant prime #: Text

Participant email: Text

CM name: Text CM phone #: Text

CM email: Text

Please check all that apply for the participant or their ICP Representative:

Note: Since this form as “Pre-Fill” sections assigned to the CM, those are shown in grey and are required before sending.

BACK SEND

As the CM, there are other sections for the participant and the employee(s) you can enter during this step as well. There are some important best practices to follow that are outlined below:

Wayne Sneag

Search Fields

Standard Fields

- Signature
- Initial
- Date Signed
- Name
- Email
- Company
- Title
- Text
- Number
- Checkbox
- Dropdown
- Radio
- Payment Item
- Drawing
- Enumeration

Oregon Department of Human Services
AGING & PEOPLE WITH DISABILITIES

Independent Choices Program (ICP)
Employee Provider(s) Information

For Addresses, Select Mailing or Physical Address checkbox; or Both checkboxes if different

ICP participant profile

Name: Text Date of birth: Text

Mailing address: Text

City: Text State: Select Zip: Text

Physical address: Text

City: Text State: Select Zip: Text

Participant phone #: Text Participant prime #: Text

Participant email: Text

CM name: Text CM phone #: Text

CM email: Text

Please check all that apply for the participant or their ICP Representative:

BACK SEND

These fields will be accessible for the participant to complete during their workflow session. As a CM, enter as much information as known to help ease the participant experience.

Important Considerations: For certain fields, you will need to double-click to either select or have access to enter from the options:

- Ex: The checkboxes require a double-click to select
- Ex: Double-clicking the state dropdown will allow you to select the option.

The conditional logic rules DO NOT apply in this pre-fill view. When the participant receives the form, they will be enforced.

As the CM, once you have completed your CM details and any known information for the participant and employee(s), click SEND.

[[Participant_UserName]] Please DocuSign: ICP Employee Provider(s) Information

Wayne Sneag

Standard Fields

Signature

Initial

Date Signed

Name

Email

Company

Title

Text

Number

Checkbox

Dropdown

Radio

Payment Item

Drawing

Formulas

Oregon Department of Human Services

AGING & PEOPLE WITH DISABILITIES

Independent Choices Program (ICP) Employee Provider(s) Information

For Addresses, Select Mailing or Physical Address checkbox; or Both checkboxes if different

ICP participant profile

Name:

Date of birth:

Mailing address:

City: State: Zip:

Physical address:

City: State: Zip:

Participant phone #: Participant p:

Participant email:

CM name:

CM email:

Please check all that apply for the participant or their ICP R

Documents

ICP_Employee_Provide

Pages: 4

Pages: 1

Signature

Initial

Date Signed

Name

Email

Company

Title

Text

Number

Checkbox

Dropdown

Radio

Payment Item

Drawing

Formulas

BACK

SEND

 docuSign

DocuSign Confidential

[Table of Contents](#)

20

Managing DocuSign Envelopes

Once all of the recipients have signed, all recipients and the sender will receive a completed copy of the ICP Employee Provider Information Form. The CM can go to the agreements tab (one-1) and download the envelope (two-2).

docusign

Home

Agreements

Templates

Reports

Admin

APD - Medicaid Services and Supports - Demo

Start

Shared Access

ENVELOPES

Inbox

Sent

Completed

Action Required

Show More

PowerForms

Inbox

Search Inbox and Folders

Last 6 months

Status

Sender

Advanced search

Clear

NAME	STATUS	LAST CHANGE
☐ Independent Choices Program Forms for PP To: Alex Lambaria, Peter Participant +2 more	Completed	3/10/2025 04:37:09 pm

Download

docusign

Docusign Confidential

Table of Contents

22

Select Combine all PDFs into a single file and select download. You can then store the documents in Laserfiche.

The screenshot displays the DocuSign web interface. At the top, the navigation bar includes 'Home', 'Agreements' (highlighted with a red box), 'Templates', 'Reports', and 'Admin'. The left sidebar shows a 'Sent' status filter (highlighted with a red box) and a list of documents. The main area shows a 'Download files' dialog box (highlighted with a red box) with the following options:

- ☒ All (7 files)
- ☒ Document (6 PDFs)
- ☒ Certificate of Completion (1 PDF)
- ☒ Combine all PDFs into a single file

A blue 'Download' button is at the bottom of the dialog. A red dashed arrow points from the 'Completed' status in the sidebar to the 'Download' button in the dialog. Another red dashed arrow points from the 'Download' button in the dialog to the 'Download' button on the document list. The document list on the right shows a table with columns for 'LAST CHANGE' and 'Download' buttons. The first row shows a change on 3/19/2025 at 03:31:28 pm, and the 'Download' button is highlighted with a red box.

Senders, which are the CMs in this case, can see the progress of envelopes while they are in flight from the Agreements tab.

The screenshot shows the Docusign interface with the 'Agreements' tab selected. The left sidebar contains a list of folders: ENVELOPES, Inbox, Sent (selected), Completed, Action Required, Drafts, Deleted, and Waiting for Others. The main content area is titled 'Sent' and displays a table of envelopes. The table has columns for NAME, STATUS, and LAST CHANGE. The 'Sent' folder is highlighted in the sidebar, and the 'Agreements' tab is highlighted in the top navigation bar. A red box highlights the 'Agreements' tab in the top navigation bar. A note box on the right states: 'Note: Within Agreements you can track the progress of sent Envelopes.'

NAME	STATUS	LAST CHANGE
☐ Participant Paul, Please Docusign: ICP Employee Provider(s) Information To: Participant Paul, Employee 1 +1 more	✓ Completed	3/19/2025 03:31:28 pm
☐ Participant Paul, Please Docusign: ICP Employee Provider(s) Information To: Participant Paul, Employee Ed +1 more	✓ Completed	3/19/2025 03:19:28 pm
☐ Participant, Please Docusign: ICP Employee Provider(s) Information To: Participant, Employee 1 +1 more	✓ Completed	3/18/2025 11:58:59 am
☐ Participant Paul, Please Docusign: ICP Employee Provider(s) Information To: Participant Paul, Employee Ed +1 more	⊘ Voided	3/18/2025 11:30:25 am
☐ Independent Choices Program Forms for dd	⊘ Voided	3/17/2025 02:24:10 pm

Note: Within Agreements you can track the progress of sent Envelopes.

There are different status points for envelopes shows below

Note:
Sent = envelopes already sent
Completed = all recipients have taken the required actions
Action Required = an action is needed from the user viewing this page
Waiting for Others = other recipients have action(s) to take

NAME	STATUS	LAST CHANGE
☐ Participant Paul, Please Docusign: ICP Employee Provider(s) Information To: Participant Paul, Employee Ed +1 more	☒ Voided	3/18/2025 11:30:25 am
☐ Independent Choices Program Forms for dd	☒ Voided	3/17/2025 02:24:10 pm

Here you can view the history of the envelope. This is the step-by-step history of this envelope.

docusign

Home

Agreements

Templates

Reports

Admin

?

Oregon Department of Human Services

Protect People. Promote Progress.

APD - Medicaid Services and Supports - Demo

Start

Shared Access

ENVELOPES

Inbox

Sent

Completed

Action Required

Show Less

Drafts

Deleted

Waiting for Others

Expiring Soon

Sent

Search Sent and Folders

Last 6 months

Status

Advanced search

Clear

	NAME	STATUS	LAST CHANGE	
☐	Participant Paul, Please Docusign: ICP Employee Provider(s) Information To: Participant Paul, Employee 1 +1 more	Completed	3/19/2025 03:31:28 pm	Download
☐	Participant Paul, Please Docusign: ICP Employee Provider(s) Information To: Participant Paul, Employee Ed +1 more	Completed	3/19/2025 03:19:28 pm	
☐	Participant, Please Docusign: ICP Employee Provider(s) Information To: Participant, Employee 1 +1 more	Completed	3/18/2025 11:58:59 am	
☐	Participant Paul, Please Docusign: ICP Employee Provider(s) Information To: Participant Paul, Employee Ed +1 more	Voided	3/18/2025 11:30:25 am	
☐	Independent Choices Program Forms for dd To: Wayne Sneag, Wayne Sneag	Voided	3/17/2025 02:24:10 pm	

Move

Forward

Copy

Copy With Field Data

Save as Template

History

Transfer Ownership

Export as CSV

View Envelope Details - The Envelope History will provide you with all of the envelope details including the actions that transpired on the envelope as well as the Certificate of Completion.

The screenshot shows the Docusign interface with a modal window titled "Envelope History". The modal is divided into two main sections: "Details" and "Activities".

Details Section:

- Subject:** Authorization for Electronic Verification of Resources for Calvin Client
- Envelope ID:** 7d2192cf-33cd-44f3-97c1-c4a6be49f936
- Date Sent:** 11/7/2024 | 08:56:36 pm
- Date Created:** 11/7/2024 | 08:56:16 pm
- Time Zone:** My computer's time zone
- Enclosed Documents:** de2639.docx
- Envelope Recipients:** Alex Lambaria, Calvin Client, Sandy Spouse
- Status:** Completed
- Status Date:** 11/7/2024 | 08:58:38 pm
- Holder:** Alex Lambaria

Activities Section:

Time	User	Action	Activity	Status
11/7/2024 08:56:16 pm	Alex Lambaria (English (us)) [api:136.58.43.28]	Registered	The envelope was created by Alex Lambaria	Created
11/7/2024 08:56:37 pm	Alex Lambaria (English (us)) [api:136.58.43.28]	Sent Invitations	Alex Lambaria sent an invitation to Alex Lambaria [anastacio.lambaria@docusign.com Case Manager]	Sent
11/7/2024 08:56:43 pm	Alex Lambaria (English (us)) [web:136.58.43.28]	Opened	Alex Lambaria opened the envelope [documents: (de2639.docx)]	Sent

At the bottom of the modal, there are two buttons: "DOWNLOAD CERTIFICATE" and "PRINT".

Correcting an Envelope - If there was an error on your envelope and you need to correct it, find your envelope and select Correct. Please note that you cannot correct form responses for a recipient after their signing session is completed. You will need to void the envelope, use [copy with field data](#), and send the new envelope.

The screenshot shows the DocuSign 'Sent' envelope management interface. The top navigation bar includes 'Home', 'Agreements', 'Templates', 'Reports', and 'Admin'. The user is logged in as 'APD - OPIM - Demo Account'. The left sidebar shows the 'Start' button and a list of folders: 'Inbox', 'Sent' (selected), 'Completed', 'Action Required', and 'PowerForms'. The main area displays a table of sent envelopes with columns for NAME, STATUS, LAST CHANGE, and FOLDER. A red arrow points to the 'Correct' option in the dropdown menu for the envelope 'OPI-M Application for Calvin Client'.

NAME	STATUS	LAST CHANGE	FOLDER
☐ OPI-M Application for Calvin Client To: Calvin Client, Sandy Spouse +2 more	Waiting for 4 others	11/11/2024 02:26:27 pm	Sent
☐ Oregon Project Independence - Medicaid Application for [[Consu... To: Alex Lamberia, Calvin Client +2 more	Voided	11/11/2024 02:25:09 pm	Sent Inbox
☐ Authorization for Electronic Verification of Resources for Calvin Cli... To: Alex Lamberia, Calvin Client +1 more	Completed	11/7/2024 08:58:38 pm	Sent Inbox
☐ Authorization for Electronic Verification of Resources for Calvin Cli... To: Alex Lamberia, Calvin Client +1 more	Completed	11/7/2024 08:44:51 pm	Sent Inbox
☐ Authorization for Electronic Verification of Resources for Calvin Cli... To: Connie CM, Calvin Client +1 more	Completed	11/7/2024 08:40:42 pm	Sent

Correcting an Envelope - Update recipient names, emails, and add documents if needed. Then select Next to go to the tagging screen.

OPI-M Application for Calvin Client

DISCARD CHANGES ADVANCED OPTIONS

Correcting

Add recipients

Some of the recipients are locked and cannot be changed [Learn More...](#)

☒ Set signing order [View](#)

10

Consumer or Authorized Representative

NEEDS TO SIGN CUSTOMIZE

Name *

Calvin Client

Email *

demo.alex.lambaria+client@gmail.com

15

Consumer's Spouse

NEEDS TO SIGN CUSTOMIZE

Name *

Sandy Spouse

Email *

NEXT

Correcting an Envelope - On the tagging screen, select Correct to finish correcting and send the envelope.

OPI-M Application for Calvin Client

Correcting

Calvin Client

Search Fields

- Standard Fields
- Signature
- Initial
- Date Signed
- Name
- Email
- Company
- Title
- Text
- Number
- Checkbox
- Dropdown

What to Expect from Your Assessment for Long-Term Support
This supplement must be created

Medicaid In-Home Service Options Brochure
This supplement must be created

Oregon Department of Human Services
MAKING LIFE BETTER FOR EVERYONE

Application for the Oregon Project Independence-Medicaid (OPI-M)

Name of individual: Full Name
DOB: Text SSN: Text Are you a U.S. Citizen or National? Select
Physical address: Text County: Select
City: Text State: OR Zip: Text
Mailing address (if different): Text
City: Text State: OR Zip: Text
Phone #: Text Email address: Text
Ethnicity: Select Race: Select
Language(s) spoken: Text
What is the preferred language for communication in person, over the phone, or virtually? Text
Language(s) read: Text
What is the preferred language for written communication? Text
Alternative formats requested: ☐ None ☐ Audio ☐ Braille ☐ Compact disk ☐ Diskette ☐ Large print ☐ Oral presentation ☐ USB thumb drive
Marital status: Select Name of Spouse: Text
Spouse DOB: Text Spouse SSN: Text
Primary contact person: Text
Relationship to individual: Text
Primary contact phone number: Text

Documents

- What to Expect from Your Assessment for Long-Term Support
- Medicaid In-Home Service Options Brochure
- Application Form v.10.2...
- Authorized Representati...

BACK CORRECT

English (US) Contact Us Terms of Use Privacy Intellectual Property Trust Copyright © 2024 Docusign, Inc. All rights reserved

Resend Envelopes - Select Resend on an envelope to resend the email notification to the current recipient in the signing order. Recipients who have finished their signing session will not receive an email notification.

DocuSign

Home

Agreements

Templates

Reports

Admin

?

Oregon Department of Human Services

DocuSign

APD - OPIM - Demo Account

Start

Access

Envelopes

Inbox

Sent

Completed

Action Required

Show More

OverForms

Sent

Search Sent and Folders

Last 6 months

Status

Advanced search

Clear

	NAME	STATUS	LAST CHANGE	FOLDER	
☐	OPIM Application for Calvin Client To: Calvin Client, Sandy Spouse +2 more	Waiting for 4 others	11/11/2024 02:26:27 pm	Sent	Resend
☐	Oregon Project Independence - Medicaid Application for [[Consu... To: Alex Lambaria, Calvin Client +2 more	Voided	11/11/2024 02:25:09 pm	Sent Inbox	Copy
☐	Authorization for Electronic Verification of Resources for Calvin Cli... To: Alex Lambaria, Calvin Client +1 more	Completed	11/7/2024 08:58:38 pm	Sent Inbox	Download
☐	Authorization for Electronic Verification of Resources for Calvin Cli... To: Alex Lambaria, Calvin Client +1 more	Completed	11/7/2024 08:44:51 pm	Sent Inbox	Download

Copy with Field Data - This option clones an envelope to create a copy that retains any information already entered by recipients. This option is especially useful for long, complex, multi-recipient envelopes that are declined or otherwise voided and need to be sent back out for signature.

The screenshot displays the Docusign 'Sent' envelope management interface. The top navigation bar includes 'Home', 'Agreements', 'Templates', 'Reports', and 'Admin'. The user is logged in as 'APD - OPIM - Demo Account'. The left sidebar shows a list of folders: 'Inbox', 'Sent', 'Completed', 'Action Required', and 'PowerForms'. The main content area shows a list of sent envelopes with the following columns: NAME, STATUS, LAST CHANGE, and FOLDER. A red arrow points to the 'Copy With Field Data' option in the context menu for the second envelope, 'Oregon Project Independence - Medicaid Application for [[Consu...]'.

NAME	STATUS	LAST CHANGE	FOLDER
☐ OPI-M Application for Calvin Client To: Calvin Client, Sandy Spouse +2 more	Waiting for 4 others	11/11/2024 03:05:23 pm	Sent Resend
☐ Oregon Project Independence - Medicaid Application for [[Consu...] To: Alex Lambaria, Calvin Client +2 more	Voiced	11/11/2024 02:25:09 pm	Sent Inbox Copy
☐ Authorization for Electronic Verification of Resources for Calvin Cli... To: Alex Lambaria, Calvin Client +1 more	Completed	11/7/2024 08:58:38 pm	Sent Inbox Move Copy With Field Data Save as Template History Transfer Ownership Export as CSV
☐ Authorization for Electronic Verification of Resources for Calvin Cli... To: Alex Lambaria, Calvin Client +1 more	Completed	11/7/2024 08:44:51 pm	Sent Inbox
☐ Authorization for Electronic Verification of Resources for Calvin Cli... To: Connie CM, Calvin Client +1 more	Completed	11/7/2024 08:40:42 pm	Sent

Copy with Field Data - After selecting Copy with Field Data you will be taken to the preparation page where you can review the documents and recipients for the envelope and update recipients if needed. Select Next to go to the tagging page.

Some of the recipients are locked and cannot be changed [Learn More...](#)

☒ Set signing order [View](#) | [Bulk send](#) [NEW](#)

10

Case Manager

NEEDS TO SIGN ▾

CUSTOMIZE ▾

Name *
 Alex Lambaria

Email *
anastacio.lambaria@docusign.com

20

Consumer or Authorized Representative

NEEDS TO SIGN ▾

CUSTOMIZE ▾

Name *
 Calvin Client

Email *
demo.alex.lambaria+client@gmail.com

SEND NOW ▾

NEXT

Copy with Field Data - On the tagging page, you can make edits to values that were previously entered or you can let the recipients correct the information for their assigned fields. Select Send when ready.

Oregon Project Independence - Medicaid Application for [[Consumer_UserName]]

Alex Lambaria

Search Fields

Standard Fields

- Signature
- Initial
- Date Signed
- Name
- Email
- Company
- Title
- Text
- Number
- Checkbox
- Dropdown
- Radio

Medicaid In-Home Service Options Brochure

Oregon Department of Human Services

Application for the Oregon Project Independence-Medicaid (OPI-M)

Name of individual:

DOB: Are you a U.S. Citizen or National?

Physical address: County:

City: State: Zip:

Mailing address (if different): State: Zip:

Phone #: Email address:

Ethnicity: Race:

Language(s) spoken:

What is the preferred language for communication in person, over the phone, or virtually?

Language(s) read:

What is the preferred language for written communication?

Alternative formats requested: ☐ None ☐ Audio ☐ Braille ☐ Compact disk ☐ Diskette ☐ Large print ☐ Oral presentation ☐ USB thumb drive

Marital status: Name of Spouse:

Spouse DOB: Spouse SSN:

Primary contact person:

Relationship to individual:

Primary contact phone number:

Primary contact email address:

Office use only: Branch #: DOR: Prime #:

Is the applicant in the ONE system? Case number:

Notes:

Documents

- What to Expect from Your Assessment for Long-Term Support
- Medicaid In-Home Service Options Brochure
- Application Form v.1.0.2...
- Authorized Representati...

BACK SEND

English (US) Contact Us Terms of Use Privacy Intellectual Property Trust Copyright © 2024 DocuSign, Inc. All rights reserved

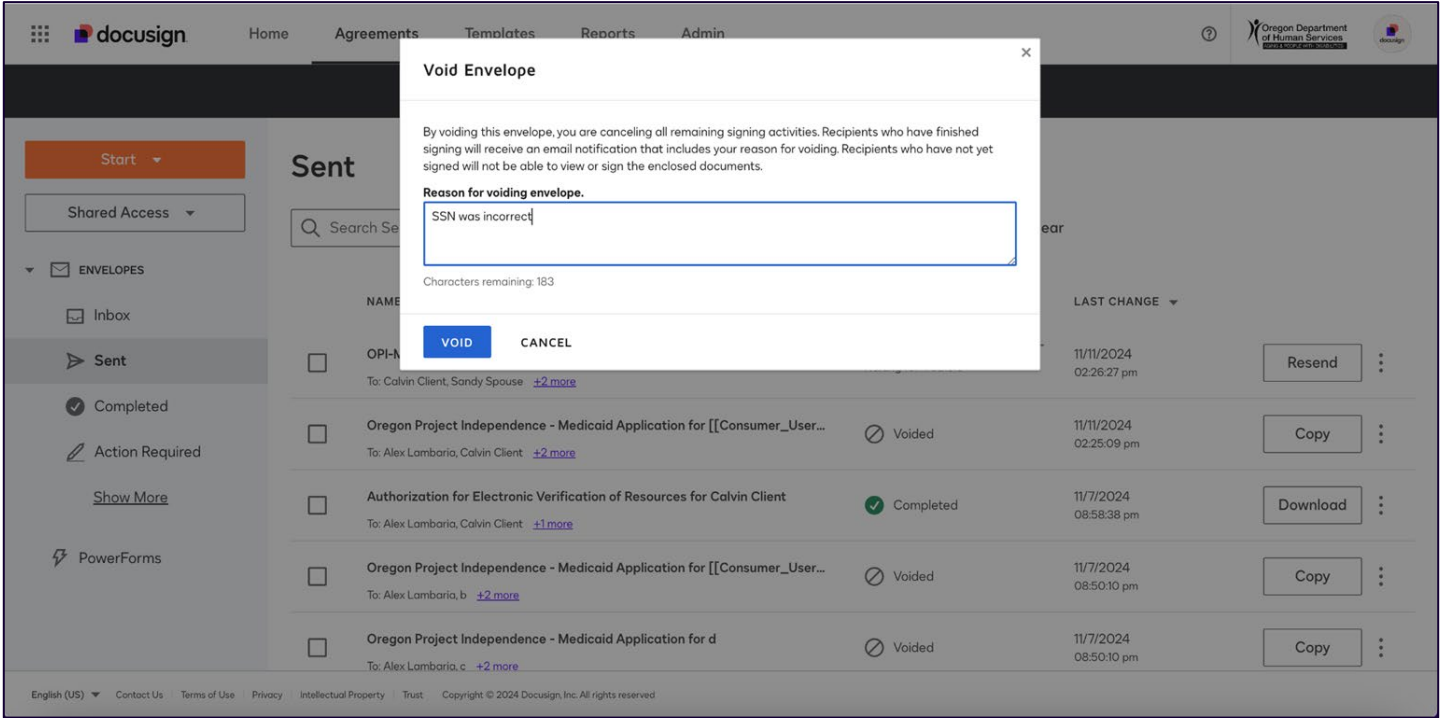
Voiding Envelopes - When you have an envelope that you cannot make corrections to or no longer need, you can void the envelope by selecting the three vertical dots on the envelope and selecting Void.

The screenshot displays the Docusign user interface. At the top, there's a navigation bar with 'Home', 'Agreements', 'Templates', 'Reports', and 'Admin'. A user profile 'APD - OPIM - Demo Account' is visible. The main section is titled 'Inbox' and includes a search bar and filters like 'Last 6 months', 'Status', and 'Sender'. A sidebar on the left shows 'ENVELOPES' with options like 'Inbox', 'Sent', 'Completed', and 'Action Required'. The main area contains a table of envelopes:

	NAME	STATUS	LAST CHANGE
☐	Oregon Project Independence - Medicaid Application for [[Consumer_User... To: Alex Lambaria, Calvin Client +2 more	Need to sign	11/11/2024 01:50:05 pm
☐	Authorization for Electronic Verification of Resources for Calvin Client To: Alex Lambaria, Calvin Client +1 more	Completed	11/7/2024 08:58:38 pm
☐	Oregon Project Independence - Medicaid Application for [[Consumer_User... To: Alex Lambaria, b +2 more	Voided	11/7/2024 08:50:10 pm
☐	Oregon Project Independence - Medicaid Application for d To: Alex Lambaria, c +2 more	Voided	11/7/2024 08:50:10 pm
☐	Authorization for Electronic Verification of Resources for Calvin Client To: Alex Lambaria, Calvin Client +1 more	Completed	11/7/2024 08:44:51 pm

A context menu is open for the third envelope (Voided), showing options: 'Sign', 'Correct', 'Copy', 'Copy With Field Data', 'Save as Template', 'Void' (highlighted), 'History', and 'Transfer Ownership'.

Voiding Envelopes - After selecting Void, you will have to provide a reason for voiding the envelope. It's important to include a detailed explanation for reporting purposes.



Locate Envelopes - Quickly search for envelopes by using the search bar, filters, or folders.

Start

Shared Access

ENVELOPES

Inbox

Sent

Completed

Action Required

Show More

PowerForms

APD - OPIM - Demo Account

Sent

Search Sent and Folders

Last 6 months

Status

Advanced search

Clear

	NAME	STATUS	LAST CHANGE	FOLDER	
☐	OPI-M Application for Calvin Client To: Calvin Client, Sandy Spouse +2 more	Waiting for 4 others	11/11/2024 02:26:27 pm	Sent	Resend
☐	Oregon Project Independence - Medicaid Application for [[Consu... To: Alex Lambaria, Calvin Client +2 more	Voided	11/11/2024 02:25:09 pm	Sent Inbox	Copy
☐	Authorization for Electronic Verification of Resources for Calvin Cli... To: Alex Lambaria, Calvin Client +1 more	Completed	11/7/2024 08:58:38 pm	Sent Inbox	Download
☐	Authorization for Electronic Verification of Resources for Calvin Cli... To: Alex Lambaria, Calvin Client +1 more	Completed	11/7/2024 08:44:51 pm	Sent Inbox	Download
☐	Authorization for Electronic Verification of Resources for Calvin Cli...	Completed	11/7/2024	Sent	Download

Appendix

Additional Guides From DocuSign Support

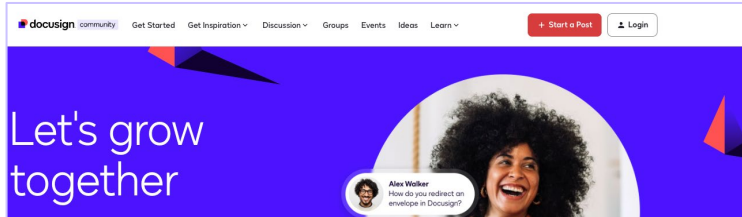
1. [Managing Envelopes](#)
2. [Correcting Envelopes](#)
3. [Voiding Envelopes](#)
4. [Resending Envelopes](#)
5. [Forwarding Completed Envelopes](#)
6. [View Data Changes](#)
7. [Envelope Status Glossary](#)

Training and Support Sites



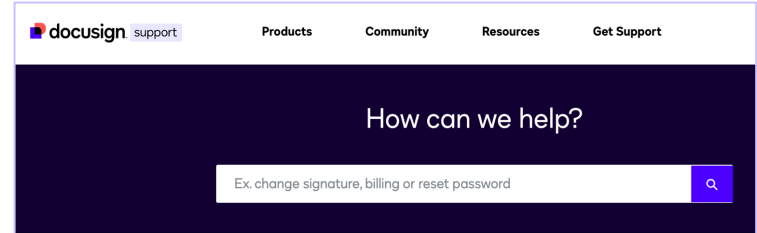
Docusign University
Learn more. Build expertise.

<https://support.Docusign.com/DocuSignUniversity>



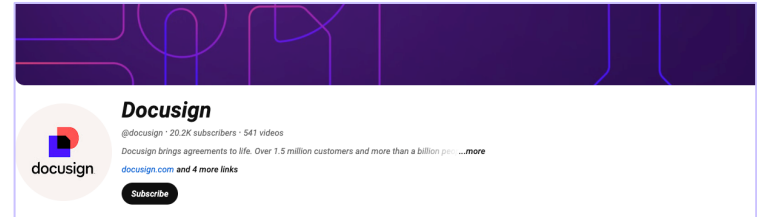
Docusign Community
Learn from the community. Discover customer solutions

<https://community.Docusign.com/>



Docusign Support
Find answers. Get help.

<https://support.Docusign.com>



Docusign on YouTube
Watch how-to tutorials. Do more with Docusign.

<https://www.youtube.com/c/Docusign/playlists>

Resources	Links
APD Support Docusign Support Center	- apd.docusignsupport@odhsoha.oregon.gov (Put Docusign in the subject line) Support Center: support.docusign.com One-stop shop for all support and adoption resources. - Docusign Support Center – Open and manage support cases or view product help - Docusign Community - Questions and answers from Customers - Docusign University - Training and certification
Trust / Security	Trust Center: trust.docusign.com - Monitored System Status on any performance issues - Docusign Public Certificates and Security information - Legality Guide: https://www.docusign.com/how-it-works/legality/global
Developer Support	Developer Center: developers.docusign.com - stackoverflow.com using #DocusignAPI - Email: devsupport@docusign.com

Need this document in another format?

You can get this letter in other languages, large print, braille, or a format you prefer for free. Contact ODHS at apd.ltss@odhsoha.oregon.gov or at 503-945-5811 (voice/text). We accept all relay calls.