

# ICP Forms Package Job Aid

# Table of Contents

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

1. [ICP Forms Package Overview](#)
2. [Accessing ICP Forms Package Templates](#)
3. [ICP Forms Package Template](#)
4. [Managing DocuSign Envelopes](#)
5. Appendix
  - a. [Guides from DocuSign Support](#)
  - b. [Training and Support Sites](#)
  - c. [Support Resources](#)

# Independent Choices Program (ICP) Forms Package Overview

# ICP Forms Package Overview

The ICP Forms Package was created to make it easy for sending out ICP Forms to individual choice participants, their representatives, and guardians making sure that all forms are returned in good order while reducing turnaround times for getting the forms back.

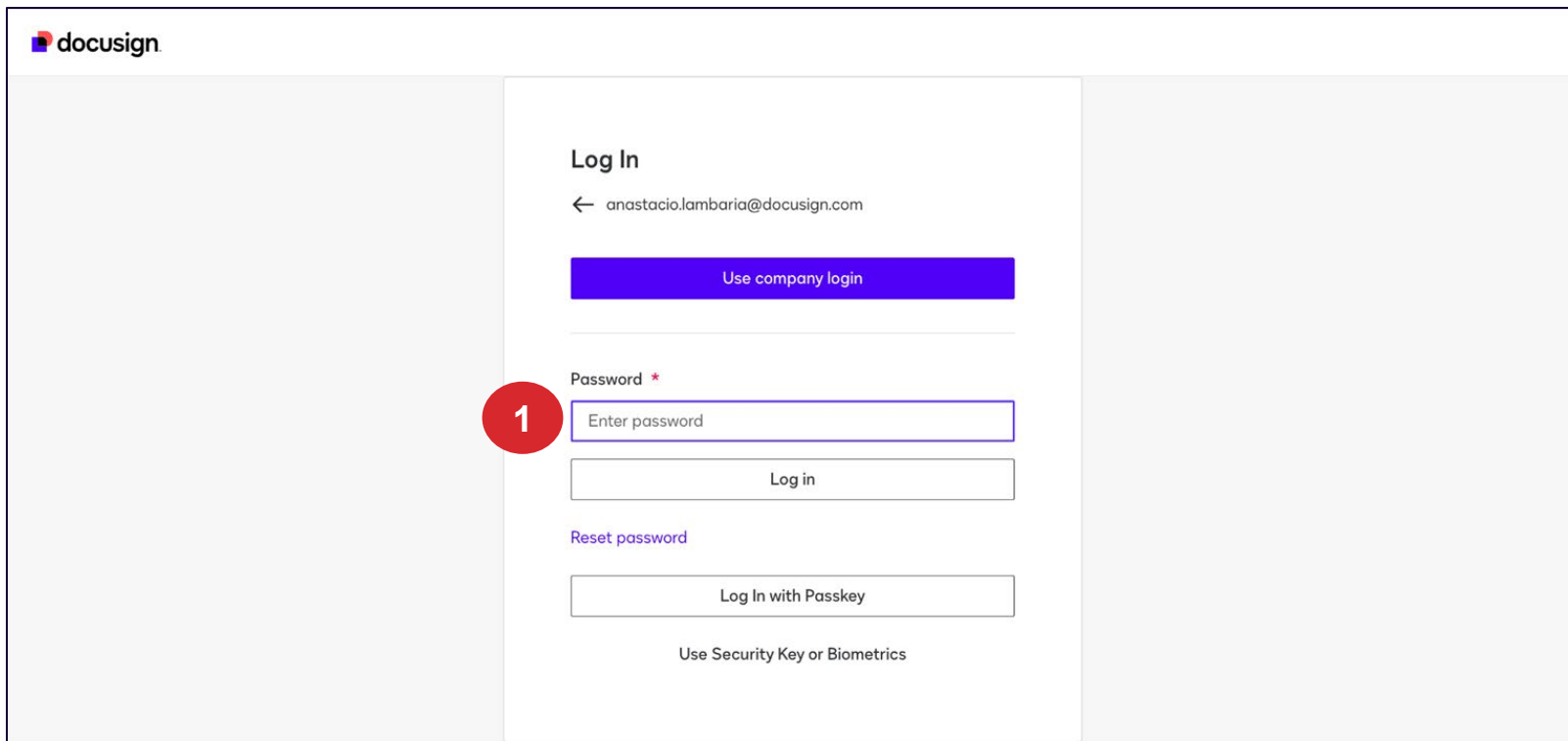
## **The ICP Forms Package includes the following forms:**

- ICP Participation Agreement (2876)
- ICP Budget Worksheet
- Workers' Compensation Consent and Agreement (353)
- ICP Representative Agreement

These forms are also available as standalone templates in case you only need one for your case, but we recommend using the package if you need to send more than one form out for signature. Instructions are included in this job aid on how to remove the forms that you do not need.

# Accessing the ICP Forms Package Template

Log into Docusign using your user email and password (one-1) at [account.docusign.com](https://account.docusign.com)



docusign.

### Log In

← anastacio.lambaria@docusign.com

Use company login

Password \*

1 Enter password

Log in

[Reset password](#)

Log In with Passkey

[Use Security Key or Biometrics](#)

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

Want to do more?

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.

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.

The screenshot shows the DocuSign dashboard interface. At the top, a dark blue header contains the text "Welcome back" and "Last 6 Months". Below this, there are four circular progress indicators with the following labels: "Action Required", "Waiting for Others", "Expiring Soon", and "Completed". The main content area is white and features a large dashed box labeled "Sign or get signatures". Inside this box, there is a "Start" button and a dropdown menu. The dropdown menu is open, showing two main sections: "AGREEMENTS" and "TEMPLATES". Under "AGREEMENTS", there are three options: "Envelopes", "Create PowerForm", and "Send an Envelope". Under "TEMPLATES", there are three options: "Envelope Templates", "Web Forms", and "Sign a Document". A red circle with the number "1" is placed over the "Envelopes" option. Another red circle with the number "2" is placed over the "Use a Template" option, which is located below the "Sign a Document" option. To the left of the "Sign or get signatures" section, there is a "Want to do more?" section with a "Need help getting started?" link and a "View Our Guide" link. At the bottom right, there is a "Download our mobile app" link.

On the template selection screen, select Shared with Me or the ICP Forms folder to see the templates (one-1).

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 ICP Forms

| NAME                                                                                                    | OWNER         | LAST CHANGE            |
|---------------------------------------------------------------------------------------------------------|---------------|------------------------|
| <input checked="" type="radio"/> ICP Forms Package v03.05.25                                            | Wayne Sneag   | 3/5/2025   5:26:00 PM  |
| <input type="radio"/> 2023 Version ICP Employee Provider(s) Information (2 employees)                   | Wayne Sneag   | 3/5/2025   5:07:16 PM  |
| <input type="radio"/> (Case Manager Fills Out) ICP Budget Worksheet                                     | Wayne Sneag   | 2/19/2025   6:27:09 PM |
| <input type="radio"/> (Case Manager Fills Out) ICP Budget Worksheet                                     | Alex Lambaria | 2/19/2025   5:47:09 PM |
| <input type="radio"/> [WIP - RfR_v2] Request for Direct Deposit - Independent Choice Program            | Alex Lambaria | 2/19/2025   5:40:53 PM |
| <input type="radio"/> (Case Manager Fills Out) Workers Compensation Consent and Agreement               | Alex Lambaria | 2/19/2025   5:25:49 PM |
| <input type="radio"/> [WIP - RfR] 2023 Version ICP Employee Provider(s) Information                     | Alex Lambaria | 2/5/2025   5:54:27 PM  |
| <input type="radio"/> [WIP - RfR] (Case Manager Fills Out) Independent Choices Representative Agreement | Alex Lambaria | 1/22/2025   4:57:27 PM |
| <input type="radio"/> [WIP - RfR] Independent Choices Participation Agreement                           | Alex Lambaria | 1/22/2025   3:39:52 PM |

Add Selected

 docusign

Docusign Confidential

[Table of Contents](#)

10

Select the ICP Forms Package (one-1) after that 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 ICP Forms

|   | NAME                                                                                                    | OWNER         | LAST CHANGE            |
|---|---------------------------------------------------------------------------------------------------------|---------------|------------------------|
| 1 | <input checked="" type="radio"/> ICP Forms Package v03.05.25                                            | Wayne Sneag   | 3/5/2025   5:26:00 PM  |
|   | <input type="radio"/> 2023 Version ICP Employee Provider(s) Information (2 employees)                   | Wayne Sneag   | 3/5/2025   5:07:16 PM  |
|   | <input type="radio"/> (Case Manager Fills Out) ICP Budget Worksheet                                     | Wayne Sneag   | 2/19/2025   6:27:09 PM |
|   | <input type="radio"/> (Case Manager Fills Out) ICP Budget Worksheet                                     | Alex Lambaria | 2/19/2025   5:47:09 PM |
|   | <input type="radio"/> [WIP - RfR_v2] Request for Direct Deposit - Independent Choice Program            | Alex Lambaria | 2/19/2025   5:40:53 PM |
|   | <input type="radio"/> (Case Manager Fills Out) Workers Compensation Consent and Agreement               | Alex Lambaria | 2/19/2025   5:25:49 PM |
|   | <input type="radio"/> [WIP - RfR] 2023 Version ICP Employee Provider(s) Information                     | Alex Lambaria | 2/5/2025   5:54:27 PM  |
|   | <input type="radio"/> [WIP - RfR] (Case Manager Fills Out) Independent Choices Representative Agreement | Alex Lambaria | 1/22/2025   4:57:27 PM |
|   | <input type="radio"/> [WIP - RfR] Independent Choices Participation Agreement                           | Alex Lambaria | 1/22/2025   3:39:52 PM |

2 Add Selected

# ICP Forms Package

Select template ICP Forms Package (two-2) from the ICP Forms folder (one-1) then select Add Selected (three-3).

The screenshot shows the 'Select a template' dialog in Docusign. On the left, a sidebar lists various template categories. A red circle with the number '1' highlights the 'ICP Forms' folder. The main area displays a table of templates. A red circle with the number '2' highlights the 'ICP Forms Package v03.05.25' template, which is selected. At the bottom right, a red circle with the number '3' highlights the 'Add Selected' button.

| NAME                                                                                                    | OWNER         | LAST CHANGE            |
|---------------------------------------------------------------------------------------------------------|---------------|------------------------|
| <input type="radio"/> **2023 Version ICP Employee Provider(s) Information (2 employees)**               | Wayne Sneag   | 3/7/2025   12:14:22 PM |
| <input checked="" type="radio"/> ICP Forms Package v03.05.25                                            | Wayne Sneag   | 3/5/2025   5:26:00 PM  |
| <input type="radio"/> (Case Manager Fills Out) ICP Budget Worksheet                                     | Wayne Sneag   | 2/19/2025   6:27:09 PM |
| <input type="radio"/> (Case Manager Fills Out) ICP Budget Worksheet                                     | Alex Lambaria | 2/19/2025   5:47:09 PM |
| <input type="radio"/> [WIP - RfR_v2] Request for Direct Deposit - Independent Choice Program            | Alex Lambaria | 2/19/2025   5:40:53 PM |
| <input type="radio"/> (Case Manager Fills Out) Workers Compensation Consent and Agreement               | Alex Lambaria | 2/19/2025   5:25:49 PM |
| <input type="radio"/> [WIP - RfR] 2023 Version ICP Employee Provider(s) Information                     | Alex Lambaria | 2/5/2025   5:54:27 PM  |
| <input type="radio"/> [WIP - RfR] (Case Manager Fills Out) Independent Choices Representative Agreement | Alex Lambaria | 1/22/2025   4:57:27 PM |
| <input type="radio"/> [WIP - RfR] Independent Choices Participation Agreement                           | Alex Lambaria | 1/22/2025   3:39:52 PM |

Delete any of the ICP forms that you do not need for the participant by selecting the X at the top right hand corner of the document.

## Add documents



**ICP Participation Agre...** :  
3 pages  
1 Template Applied

**ICP Budget Worksheet** :  
1 page

**Workers' Comp. Conse...** :  
2 pages

**ICP Representative Ag...** :  
3 pages

Provide the name and email information for the Case Manager (CM), and the ICP Participant or ICP Representative roles.

The screenshot displays two role configuration cards in the DocuSign interface. On the left, a vertical dropdown menu is visible with a yellow bar for the 'Case Manager' role (indicated by a red arrow) and a blue bar for the 'ICP Participant or ICP Representative' role (indicated by another red arrow). The 'Case Manager' card is labeled '10' and the 'ICP Participant or ICP Representative' card is labeled '15'. Both cards have a title bar with 'Needs to Sign' and 'Customize' options. The 'Case Manager' card has a 'Name' field with a red asterisk and a 'Delivery' section with 'Email' selected (checked checkbox) and 'SMS (Text)' unselected (unchecked checkbox). Below the delivery options are fields for 'Email \*' and '+1 - Phone number'. The 'ICP Participant or ICP Representative' card has identical fields and options.

**Note:**

If the ICP Representative has not signed the ICP Representative Agreement yet, they will have to sign that before filling the ICP Participant or ICP Representative role.

Email is the recommended method of sending DocuSign forms, but they may also be sent via text when requested.

Provide the name and email information for the Representative, and the Guardian roles if needed. Delete the roles if they are not needed for your envelope by selecting the trash can in the top right corner.

The screenshot displays two configuration forms for DocuSign roles. The top form is for the 'Representative' role, and the bottom form is for the 'Guardian' role. Both forms have a left-hand tab bar with '20' for Representative and '40' for Guardian. Each form includes fields for Name, Delivery method (Email checked, SMS optional), Email, and Phone number. At the top right of each form are links for 'Needs to Sign', 'Customize', and a trash can icon for deletion. Red arrows highlight the role selection tabs and the delete icons.

**Representative** Needs to Sign Customize

Name \*

Delivery \*

☒ Email ☐ SMS (Text)

Email \*

+1 Phone number

**Guardian** Needs to Sign Customize

Name \*

Delivery \*

☒ Email ☐ SMS (Text)

Email \*

+1 Phone number

**Note:**

The Representative role is only filled out if the ICP Representative Agreement is being signed.

The Guardian role is only filled out if the Workers' Comp. Consent and Agreement is being signed and is still optional.

Email is the recommended method of sending DocuSign forms, but they may also be sent via text when requested.

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 Send Now (three-3).

×

Independent Choices Program Forms for [[ECF:Consumer Initials]]

ⓘ

Advanced Options

⌵ Add Recipient

+ Add Delay

1

Add envelope custom fields

^

Consumer First and Last Name \*

Consumer Initials \*

Characters remaining: 100

Characters remaining: 100

Add message

^

☒ Custom email and language for each recipient

To: Case Manager

Email Language \*

English (US)

Email Subject \*

Independent Choices Program Forms for [[ECF:Consumer Initials]]

Characters remaining: 37

Email Message

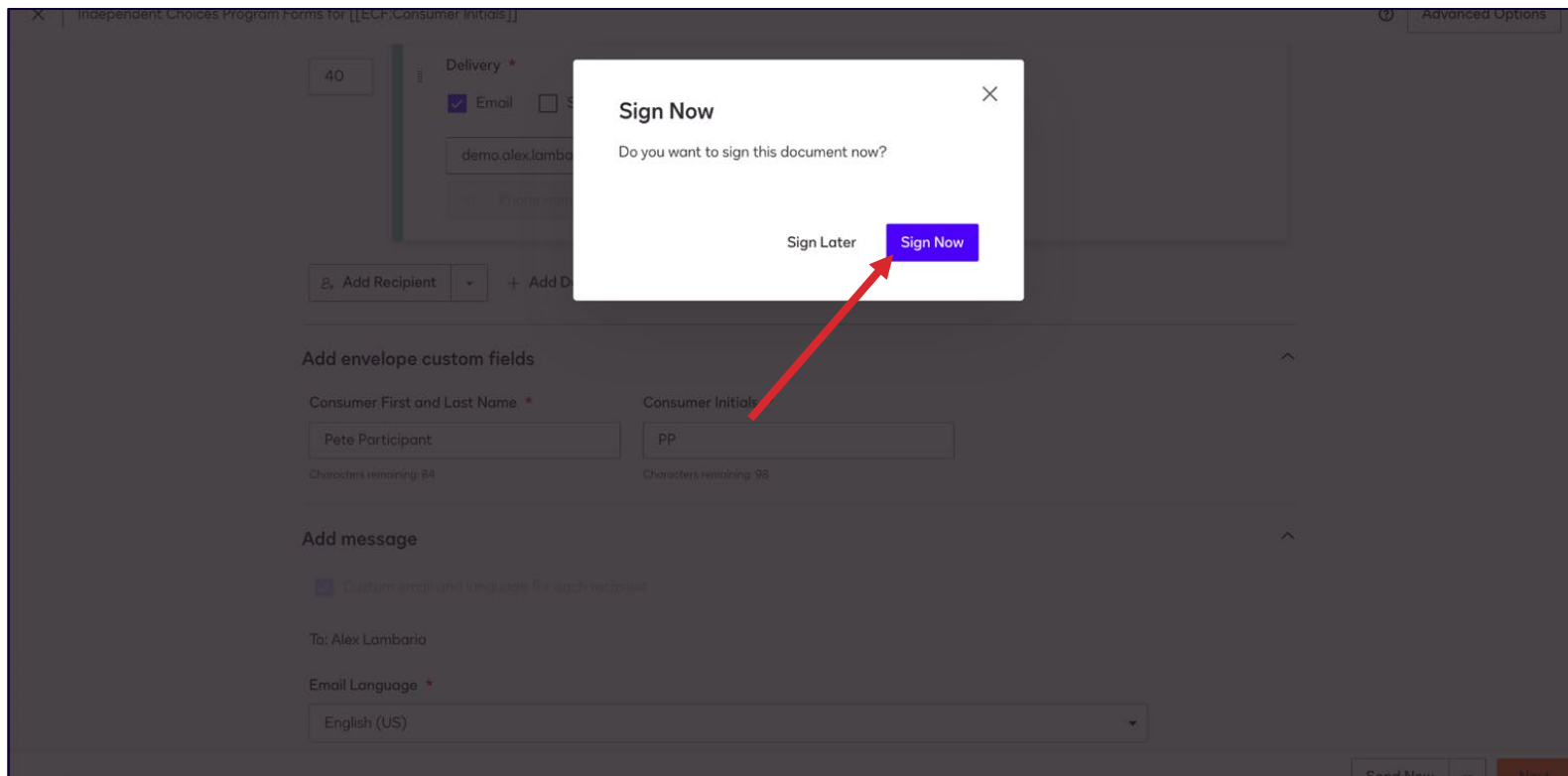
[[Data:RecipientName]].

3

Send Now

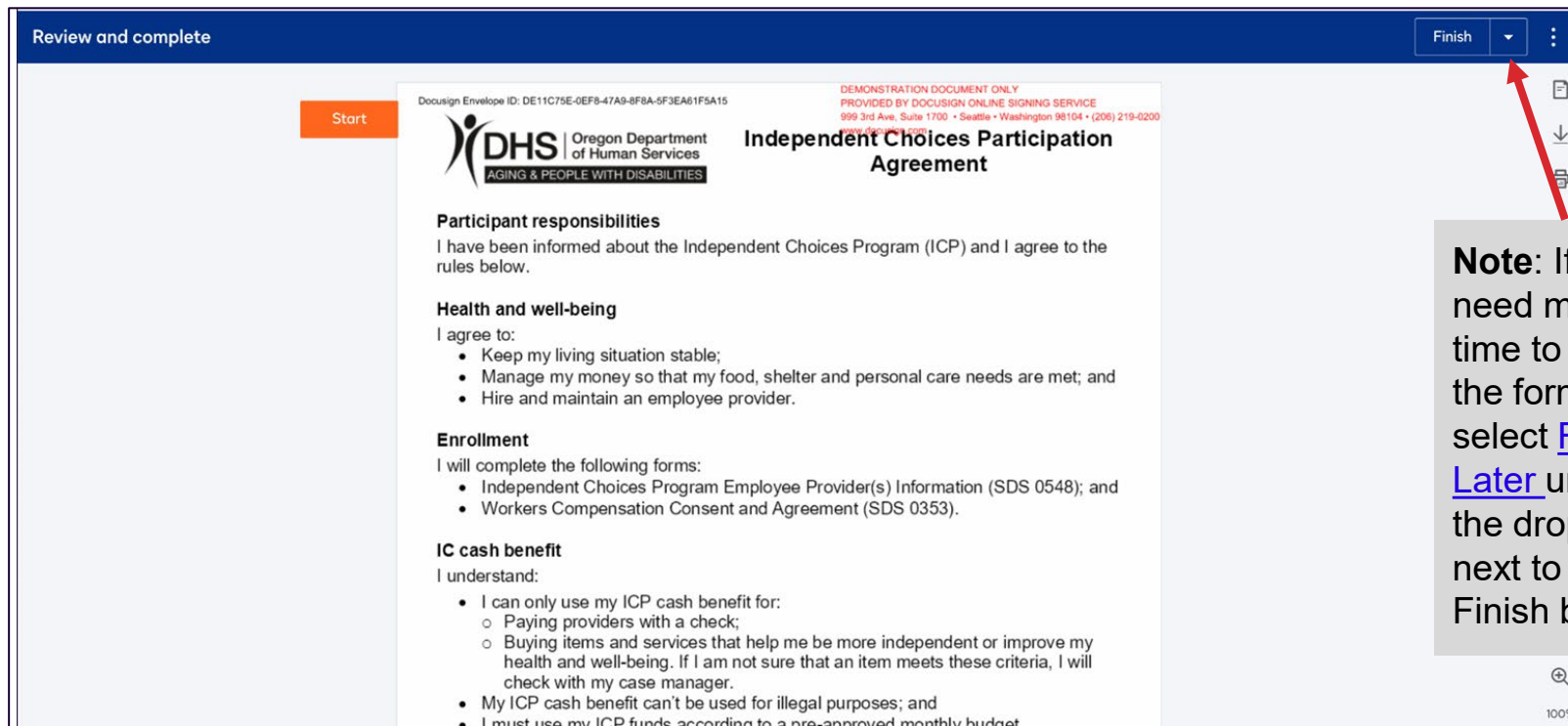
Next

If you are the CM, you will get a Sign Now pop up that will bring you into the signing session to fill out the application. Otherwise, the envelope will be sent to the CM to fill out.



The screenshot shows a 'Sign Now' pop-up dialog box in the center of the screen. The dialog has a title bar with a close button (X) and the text 'Sign Now'. Below the title, it asks 'Do you want to sign this document now?'. At the bottom of the dialog, there are two buttons: 'Sign Later' and 'Sign Now'. A red arrow points from the 'Sign Now' button in the dialog to the 'Sign Now' button in the background application. The background application is a form titled 'Independent Choice Program Forms for [[ECF Consumer Initials]]'. It has a 'Delivery' section with 'Email' selected. Below that, there's a field for 'demo.alex.lamba'. Further down, there's a section 'Add envelope custom fields' with two input fields: 'Consumer First and Last Name' (containing 'Pete Participant') and 'Consumer Initials' (containing 'PP'). Below these fields are character counts: 'Characters remaining: 84' and 'Characters remaining: 98'. There's also a section 'Add message' with a checkbox 'Custom email and language for each recipient' and a 'To:' field containing 'Alex Lambaria'. At the bottom, there's an 'Email Language' dropdown menu set to 'English (US)'. The bottom right of the background application has buttons for 'Send Now' and 'Next'.

Once the CM is in the signing session, they will have to fill out all of the required fields and select Finish before the application is routed to the next recipient.



Review and complete

Finish

Start

Docusign Envelope ID: DE11C75E-0EF8-47A9-8F8A-5F3EA61F5A15

DEMONSTRATION DOCUMENT ONLY  
PROVIDED BY DOCUSIGN ONLINE SIGNING SERVICE  
999 3rd Ave, Suite 1700 • Seattle • Washington 98104 • (206) 219-0200  
DocuSign, Inc. 2019

**DHS** | Oregon Department of Human Services  
AGING & PEOPLE WITH DISABILITIES

### Independent Choices Participation Agreement

#### Participant responsibilities

I have been informed about the Independent Choices Program (ICP) and I agree to the rules below.

#### Health and well-being

I agree to:

- Keep my living situation stable;
- Manage my money so that my food, shelter and personal care needs are met; and
- Hire and maintain an employee provider.

#### Enrollment

I will complete the following forms:

- Independent Choices Program Employee Provider(s) Information (SDS 0548); and
- Workers Compensation Consent and Agreement (SDS 0353).

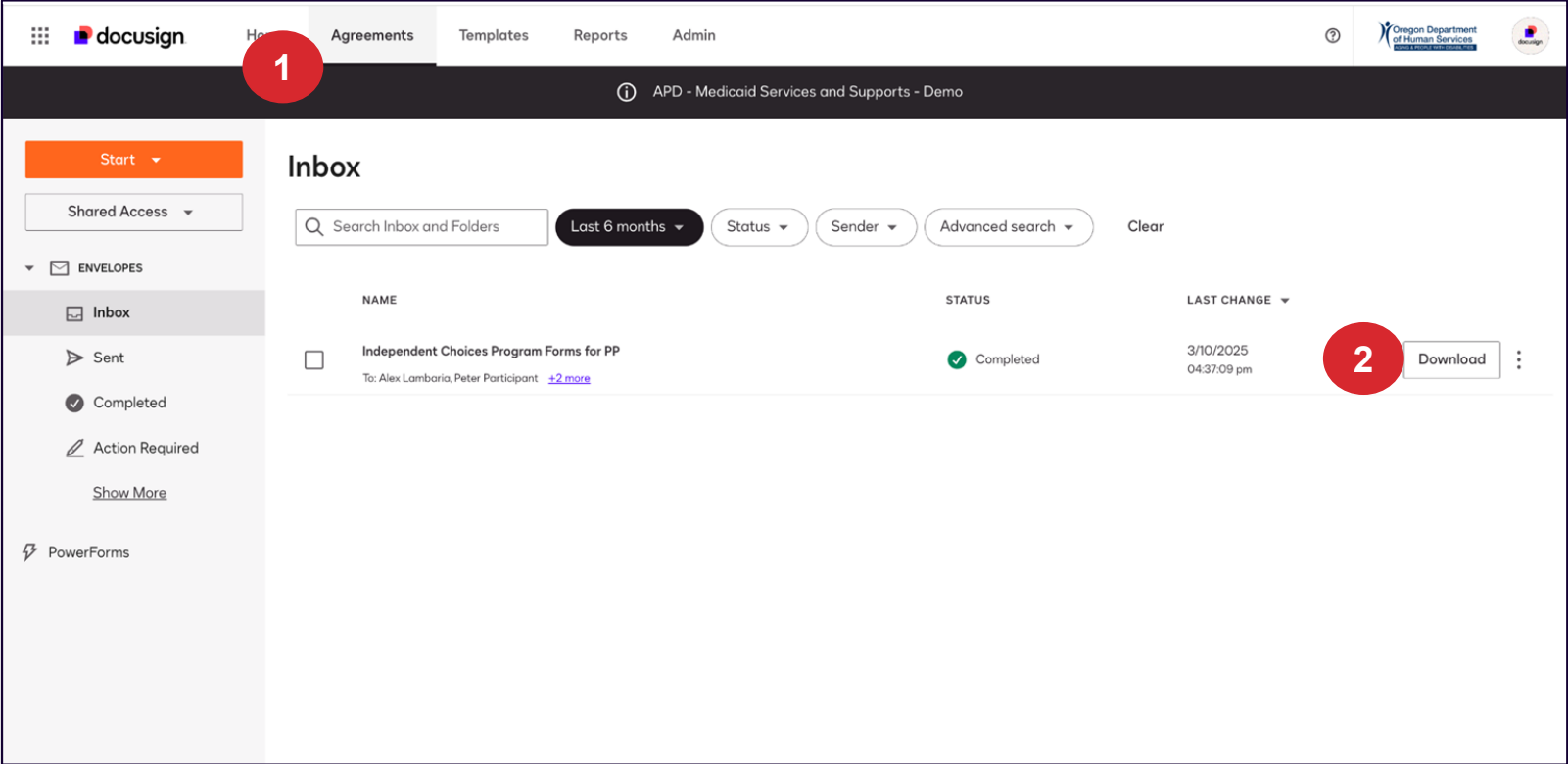
#### IC cash benefit

I understand:

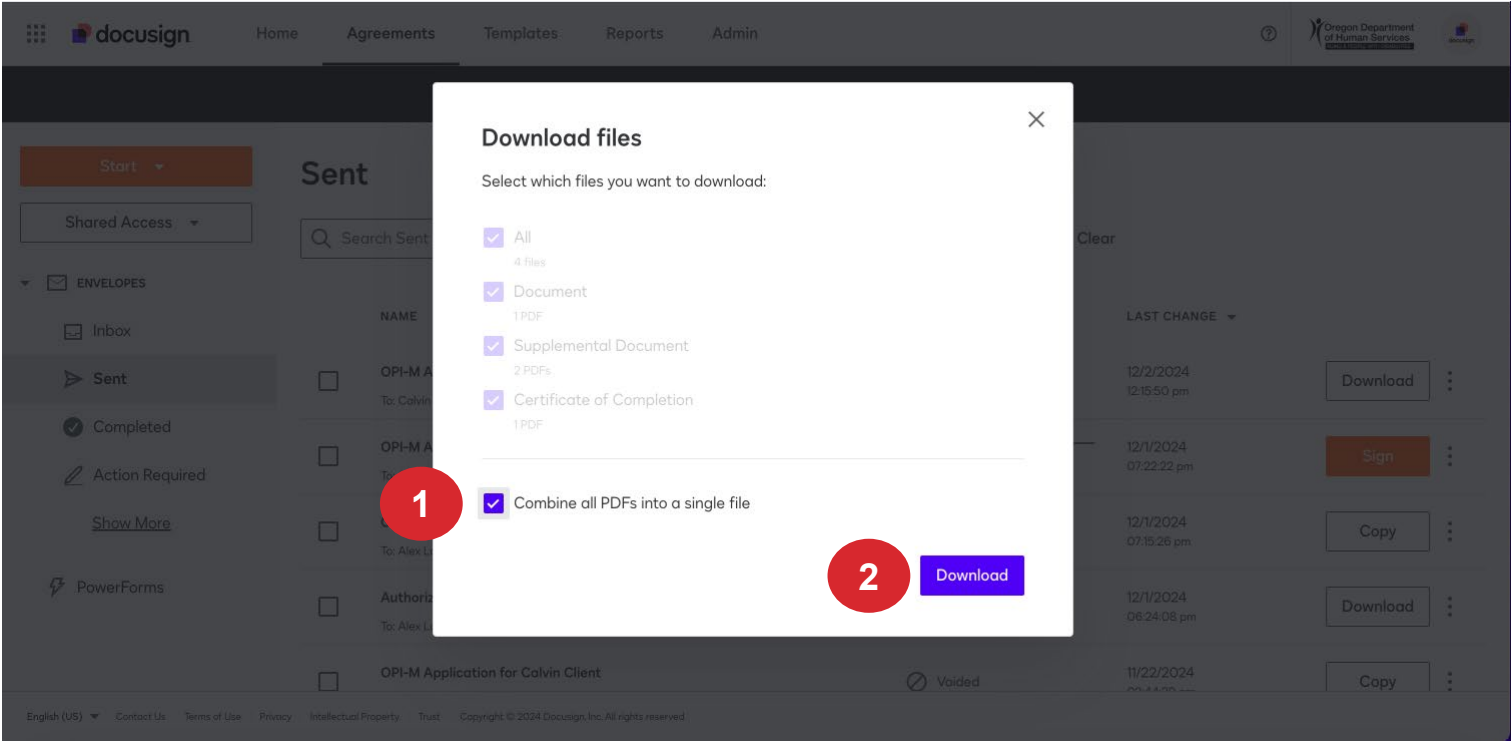
- I can only use my ICP cash benefit for:
  - Paying providers with a check;
  - Buying items and services that help me be more independent or improve my health and well-being. If I am not sure that an item meets these criteria, I will check with my case manager.
- My ICP cash benefit can't be used for illegal purposes; and
- I must use my ICP funds according to a pre-approved monthly budget.

**Note:** If you need more time to fill out the forms, select [Finish Later](#) under the dropdown next to the Finish button.

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



Select Combine all PDFs into a single file (one-1) and select download (two-2). You can then store the documents in Laserfiche.



# Managing DocuSign Envelopes

View Envelope Details - You can see the basic envelope details such as the Status, Last Change, Recipients on the envelope from the Agreements Tab. Select History to see additional information.

The screenshot shows the Docusign Envelope Manager interface. The top navigation bar includes 'Home', 'Agreements', 'Templates', 'Reports', and 'Admin'. The sidebar on the left has a 'Start' button, 'Shared Access', and a list of 'ENVELOPES' including 'Inbox', 'Sent', 'Completed', 'Action Required', 'Show More', and 'PowerForms'. The main area displays a table of envelopes with columns for NAME, STATUS, and LAST CHANGE. A red arrow points to the 'History' option in the dropdown menu for the second envelope.

| NAME                                                                                                                                                          | STATUS    | LAST CHANGE            |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------|------------------------|
| <input type="checkbox"/> Authorization for Electronic Verification of Resources for Calvin Client<br>To: Alex Lambaria, Calvin Client <a href="#">+1 more</a> | Completed | 11/7/2024 08:58:38 pm  |
| <input type="checkbox"/> Oregon Project Independence - Medicaid Application for [[Consumer_User...<br>To: Alex Lambaria, b <a href="#">+2 more</a>            | Voided    | 11/7/2024 08:50:10 pm  |
| <input type="checkbox"/> Oregon Project Independence - Medicaid Application for d<br>To: Alex Lambaria, c <a href="#">+2 more</a>                             | Voided    | 11/7/2024 08:50:10 pm  |
| <input type="checkbox"/> Authorization for Electronic Verification of Resources for Calvin Client<br>To: Alex Lambaria, Calvin Client <a href="#">+1 more</a> | Completed | 11/7/2024 08:44:51 pm  |
| <input type="checkbox"/> Oregon Project Independence - Medicaid Application for d<br>To: Alex Lambaria, c <a href="#">+2 more</a>                             | Voided    | 10/28/2024 12:12:43 pm |

# 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 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 the 'Start' button and a list of folders: 'Inbox', 'Sent' (selected), 'Completed', 'Action Required', and 'PowerForms'. The main area shows a list of envelopes under the 'Sent' folder. The table has columns for 'NAME', 'STATUS', 'LAST CHANGE', and 'FOLDER'. A red arrow points to the 'Correct' option in the context menu for the 'OPI-M Application for Calvin Client' envelope.

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

# 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

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  
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.

Start

ed Access

ELOPES

ibox

ent

ompleted

ction Required

how More

verForms

ocusign

Home

Agreements

Templates

Reports

Admin

?

Oregon Department of Human Services

ocusign

APD - OPIM - Demo Account

Sent

Search Sent and Folders

Last 6 months

Status

Advanced search

Clear

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

**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 shows the Docusign web interface for a 'Sent' envelope list. 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 navigation menu with 'Start', 'Shared Access', 'ENVELOPES' (Inbox, Sent, Completed, Action Required), and 'PowerForms'. The main content area displays a table of sent envelopes with columns for NAME, STATUS, LAST CHANGE, and FOLDER. A context menu is open for the third envelope, 'Authorization for Electronic Verification of Resources for Calvin Client...', which is marked as 'Completed'. The menu options include 'Move', 'Copy With Field Data' (highlighted by a red arrow), 'Save as Template', 'History', and 'Transfer Ownership'.

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

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 Lamberia

64%

SHORTCUTS

Search Fields

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

Medicaid In-Home Service Options Brochure  
This agreement is for your information.

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

**Oregon Department of Human Services**

Name of individual: Full Name  
DOB: SSN Are you a U.S. Citizen or National? Select  
Physical address: County: State: OR Zip  
City: State: OR Zip  
Mailing address (if different): City: State: OR Zip  
Phone #: Email address:  
Ethnicity: Race: Select  
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? YES NO Case number:  
Notes:

Documents

- What to Expect from Your Assessment for Long-Term Support
- Medicaid In-Home Service Options Brochure
- Application Form v1.0.2...
- Authorized Representati...

BACK SEND

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.

docusign

Home

Agreements

Templates

Reports

Admin

APD - OPIM - Demo Account

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               |                             |
|--------------------------|----------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------|---------------------------|-----------------------------|
| <input type="checkbox"/> | <b>Oregon Project Independence - Medicaid Application for [[Consumer_User...</b><br>To: Alex Lambaria, Calvin Client <a href="#">+2 more</a> | <div><div></div></div> Need to sign | 11/11/2024<br>01:50:05 pm | <div>Sign</div> <div></div> |
| <input type="checkbox"/> | <b>Authorization for Electronic Verification of Resources for Calvin Client</b><br>To: Alex Lambaria, Calvin Client <a href="#">+1 more</a>  | <div><div></div></div> Completed    | 11/7/2024<br>08:58:38 pm  | <div></div> <div></div>     |
| <input type="checkbox"/> | <b>Oregon Project Independence - Medicaid Application for [[Consumer_User...</b><br>To: Alex Lambaria, b <a href="#">+2 more</a>             | <div><div></div></div> Voided       | 11/7/2024<br>08:50:10 pm  | <div></div> <div></div>     |
| <input type="checkbox"/> | <b>Oregon Project Independence - Medicaid Application for d</b><br>To: Alex Lambaria, c <a href="#">+2 more</a>                              | <div><div></div></div> Voided       | 11/7/2024<br>08:50:10 pm  | <div></div> <div></div>     |
| <input type="checkbox"/> | <b>Authorization for Electronic Verification of Resources for Calvin Client</b><br>To: Alex Lambaria, Calvin Client <a href="#">+1 more</a>  | <div><div></div></div> Completed    | 11/7/2024<br>08:44:51 pm  | <div></div> <div></div>     |

Correct

Copy

Copy With Field Data

Save as Template

Void

History

Transfer Ownership

English (US)

Contact Us

Terms of Use

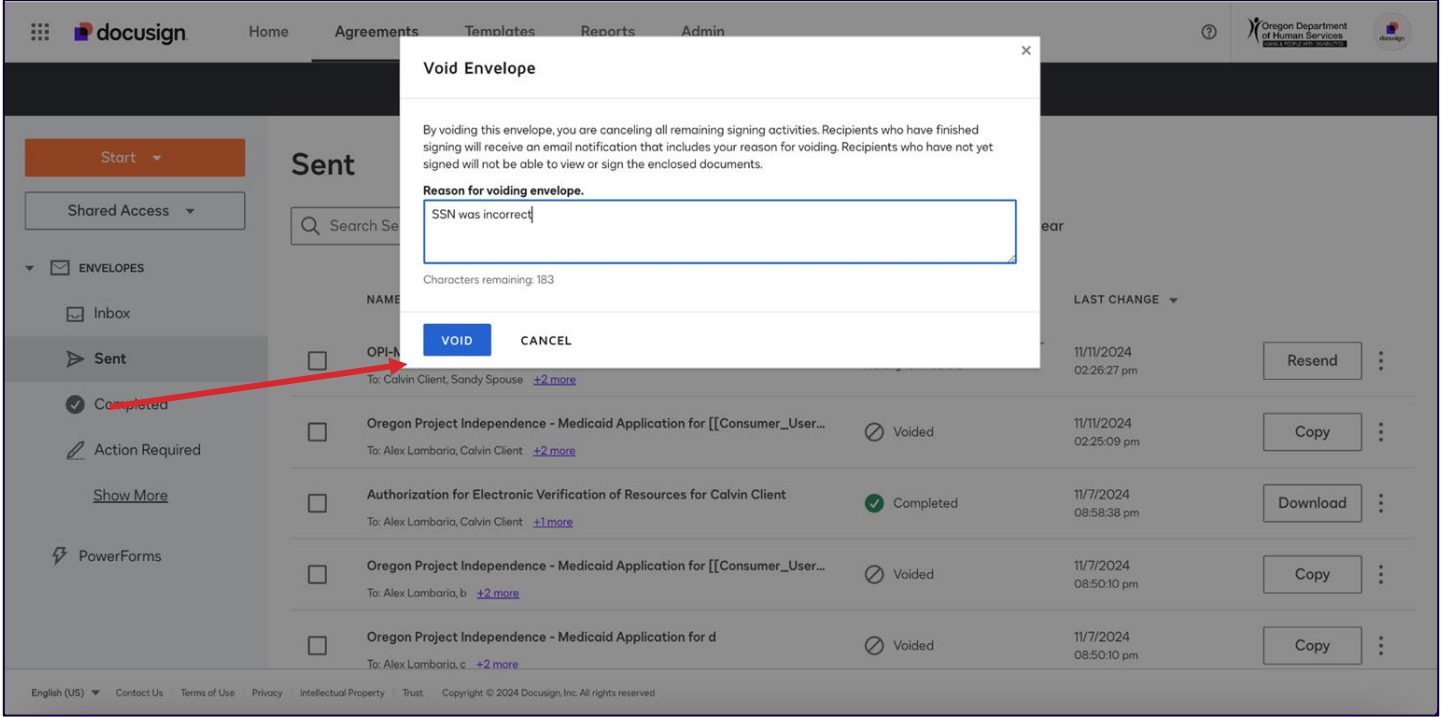
Privacy

Intellectual Property

Trust

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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.

**DocuSign** Home Agreements Templates Reports Admin

APD - OPIM - Demo Account

**Sent**

Start ▾

Shared Access ▾

Search Sent and Folders Last 6 months ▾ Status ▾ Advanced search ▾ Clear

ENVELOPES

- Inbox
- Sent**
- Completed
- Action Required

[Show More](#)

PowerForms

|                          | NAME                                                                                                                                 | STATUS               | LAST CHANGE ▾          | FOLDER                                        |            |
|--------------------------|--------------------------------------------------------------------------------------------------------------------------------------|----------------------|------------------------|-----------------------------------------------|------------|
| <input type="checkbox"/> | OPI-M Application for Calvin Client<br>To: Calvin Client, Sandy Spouse <a href="#">+2 more</a>                                       | Waiting for 4 others | 11/11/2024 02:26:27 pm | <a href="#">Sent</a>                          | Resend ⋮   |
| <input type="checkbox"/> | Oregon Project Independence - Medicaid Application for [[Consu...<br>To: Alex Lambaria, Calvin Client <a href="#">+2 more</a>        | ⊘ Voided             | 11/11/2024 02:25:09 pm | <a href="#">Sent</a><br><a href="#">Inbox</a> | Copy ⋮     |
| <input type="checkbox"/> | Authorization for Electronic Verification of Resources for Calvin Cli...<br>To: Alex Lambaria, Calvin Client <a href="#">+1 more</a> | ✓ Completed          | 11/7/2024 08:58:38 pm  | <a href="#">Sent</a><br><a href="#">Inbox</a> | Download ⋮ |
| <input type="checkbox"/> | Authorization for Electronic Verification of Resources for Calvin Cli...<br>To: Alex Lambaria, Calvin Client <a href="#">+1 more</a> | ✓ Completed          | 11/7/2024 08:44:51 pm  | <a href="#">Sent</a><br><a href="#">Inbox</a> | Download ⋮ |
| <input type="checkbox"/> | Authorization for Electronic Verification of Resources for Calvin Cli...<br>To: Alex Lambaria, Calvin Client <a href="#">+1 more</a> | ✓ Completed          | 11/7/2024 08:44:51 pm  | <a href="#">Sent</a>                          | Download ⋮ |

Finish Later - Use Finish Later when you need more time to fill out the application so you can save your work and come back to it at a later time.

Review and complete

Finish

START

**What to Expect from Your Assessment for Long-Term Support**  
This supplement is for your information.

**Medicaid In-Home Service Options Brochure**  
This supplement is for your information.

DocuSign Envelope ID: 68E87211-0F4F-4CFC-B6BC-0818A7A1DB09

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www.docusign.com

**Oregon Department of Human Services**  
AGING & PEOPLE WITH DISABILITIES

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

Name of individual:

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

Physical address:  County: -- select --

OTHER ACTIONS

- Finish Later
- Assign to Someone Else
- Void
- Print & Sign

100%

# Appendix

# Additional Guides From DocuSign Support

---

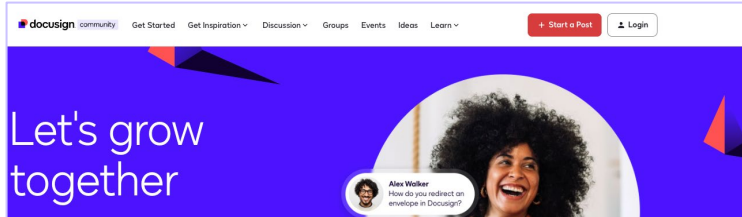
1. [Managing Envelopes](#)
2. [Correcting Envelopes](#)
3. [Voiding Envelopes](#)
4. [Resending Envelopes](#)
5. [Forwarding Completed Envelopes](#)
6. [View Data Changes](#)
7. [Envelope Status Glossary](#)

# Training and Support Sites



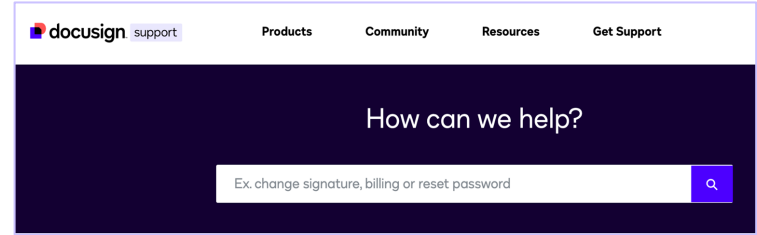
**Docusign University**  
Learn more. Build expertise.

<https://support.docusign.com/docusignuniversity>



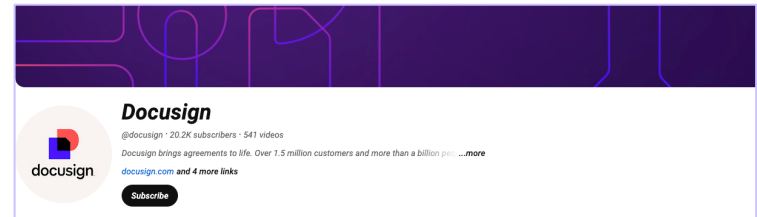
**Docusign Community**  
Learn from the community. Discover customer solutions

<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>

| Support                                           | Resources                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
|---------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p>APD Support</p> <p>Docusign Support Center</p> | <p>- <a href="mailto:apd.docusignsupport@odhsoha.oregon.gov">apd.docusignsupport@odhsoha.oregon.gov</a> (Put Docusign in the subject line)</p> <p>Support Center: <a href="https://support.docusign.com">support.docusign.com</a></p> <p>One-stop shop for all support and adoption resources.</p> <ul style="list-style-type: none"> <li>- <a href="#">Docusign Support Center</a> – Open and manage support cases or view product help</li> <li>- <a href="#">Docusign Community</a> - Questions and answers from Customers</li> <li>- <a href="#">Docusign University</a> - Training and certification</li> </ul> |
| <p>Trust / Security</p>                           | <p>Trust Center: <a href="https://trust.docusign.com">trust.docusign.com</a></p> <ul style="list-style-type: none"> <li>- Monitored System Status on any performance issues</li> <li>- Docusign Public Certificates and Security information</li> <li>- Legality Guide: <a href="https://www.docusign.com/how-it-works/legality/global">https://www.docusign.com/how-it-works/legality/global</a></li> </ul>                                                                                                                                                                                                         |
| <p>Developer Support</p>                          | <p>Developer Center: <a href="https://developers.docusign.com">developers.docusign.com</a></p> <ul style="list-style-type: none"> <li>- <a href="https://stackoverflow.com">stackoverflow.com</a> using #DocusignAPI</li> <li>- Email: <a href="mailto:devsupport@Docusign.com">devsupport@Docusign.com</a></li> </ul>                                                                                                                                                                                                                                                                                               |

## **Need this document in another format?**

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