DocuSign District Administrator Help Sheet

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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.

Troubleshooting

Support guide includes common signing issues that your senders may encounter. 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.

Support escalation

1. Look up the issue on the DocuSign Support Site.
2. If unable to resolve via email, schedule a call to meet with the Case Manager and have them screenshare and walk through the issue.
3. Submit a Oregon Project Independence - Medicaid (OPI-M) Microsoft Form request and someone will get back to you and the staff member on next steps.

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 a AAA and you need someone else to take on their inflight envelopes. [Access the support guide](#).

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.

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