Oregon Department of Human Services
AGING & PEOPLE WITH DISABILITIES

DocuSign-Guide for ICP Employee Provider Information Form

Version: May 8, 2025

docusign.

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Independent Choices Program (ICP) Employee Provider Information Overview

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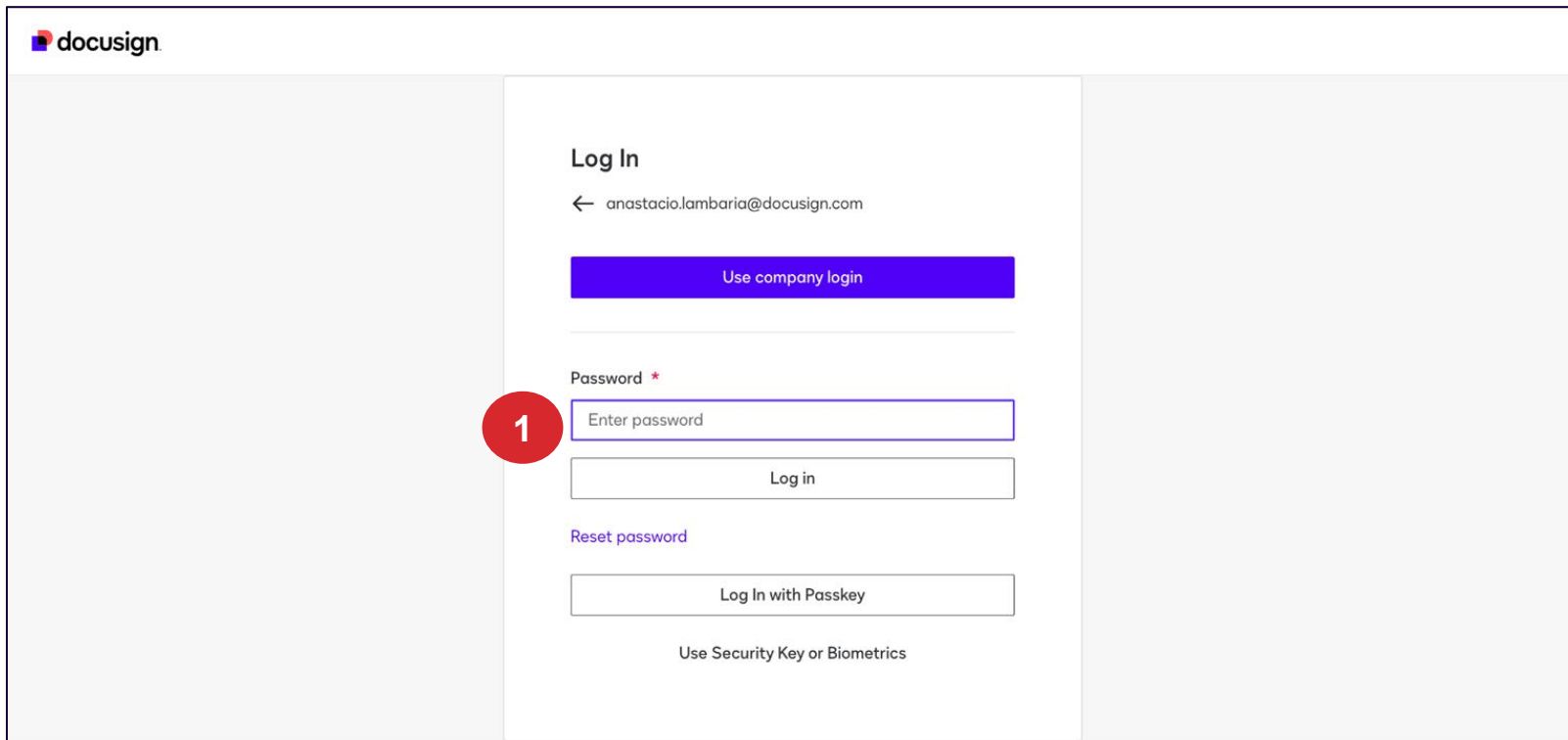# ICP Employee Provider Information Overview

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.

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).
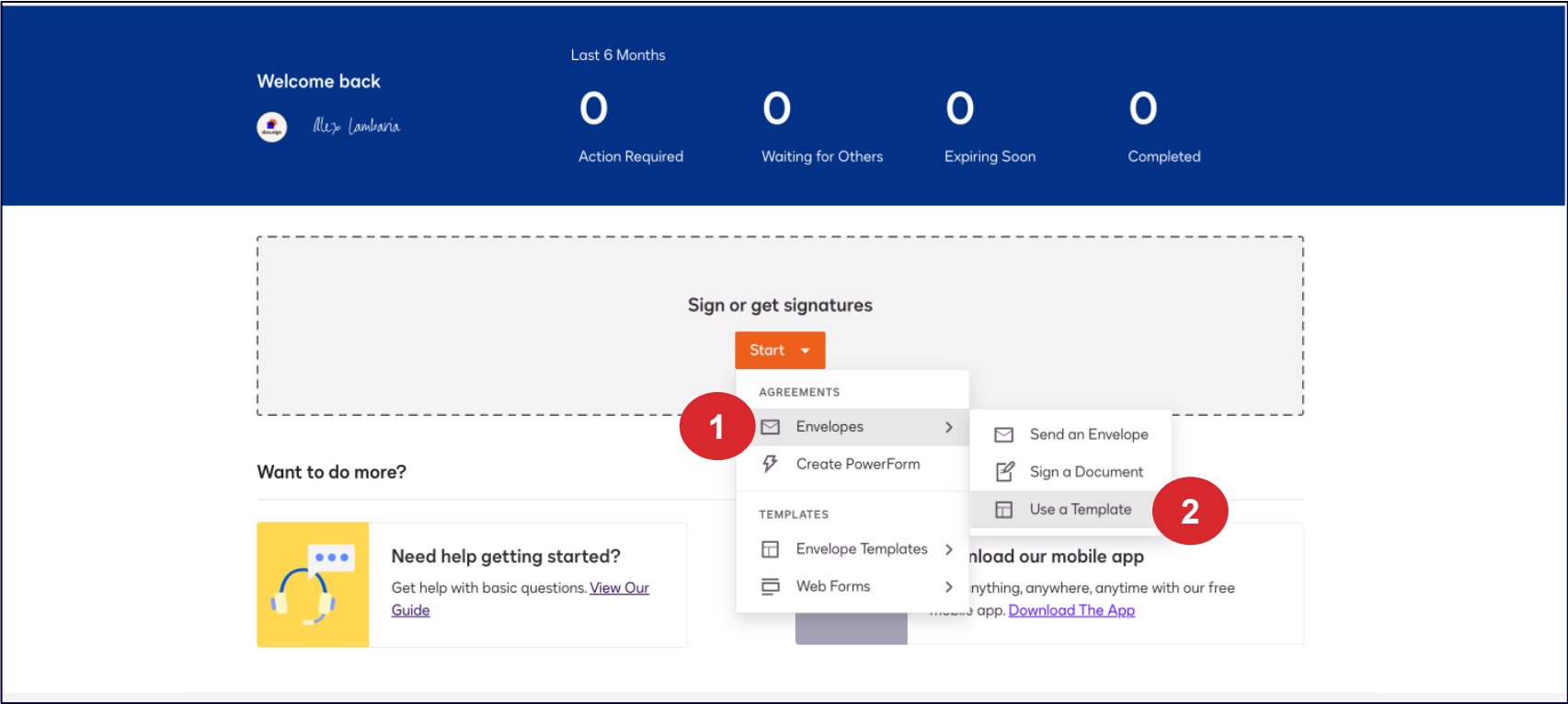
Select the Start button (one-1).

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

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

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

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.

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

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.

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

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?

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).

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

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

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:

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.

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.

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

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).

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

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

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

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

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.

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.

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

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

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.

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.

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.

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.

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.

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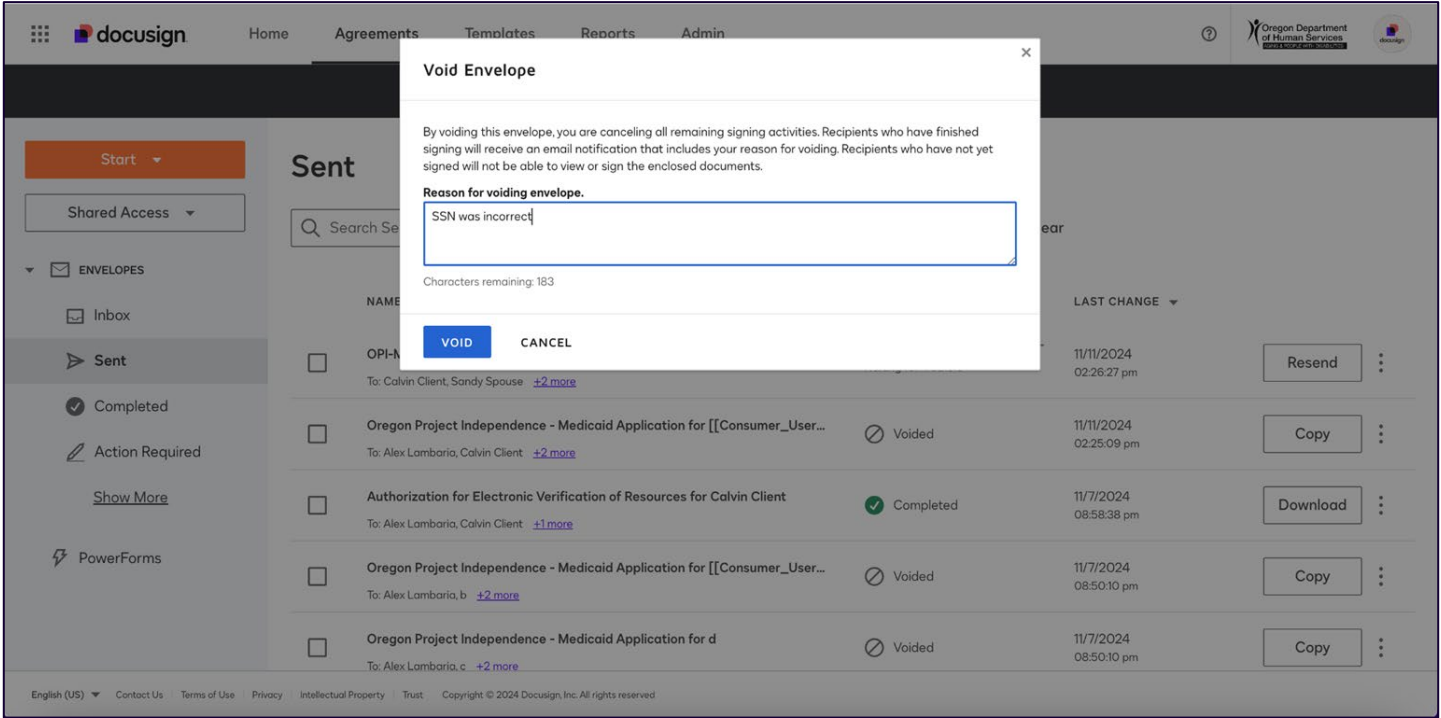
Locate Envelopes - Quickly search for envelopes by using the search bar, filters, or folders.

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
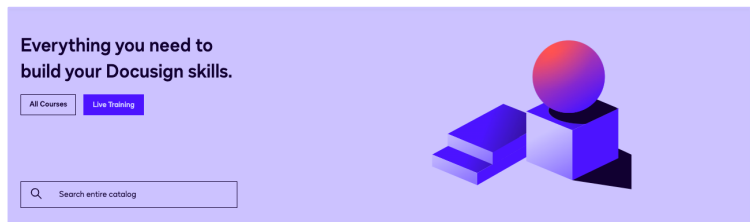
Docusign University
Learn more. Build expertise.

https://support.Docusign.com/Docusignuniversity

Docusign Support
Find answers. Get help.

https://support.Docusign.com
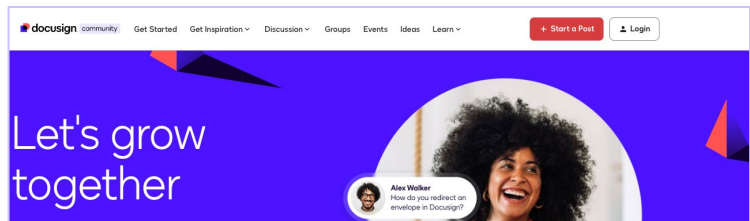
Docusign Community
Learn from the community. Discover customer solutions

https://community.Docusign.com/
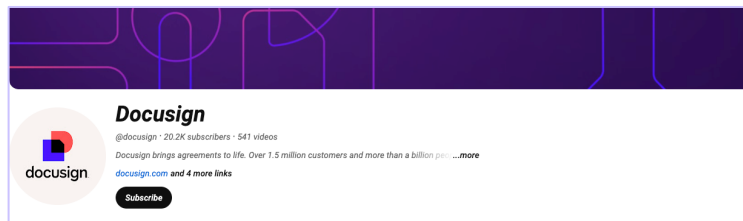
Docusign on YouTube
Watch how-to tutorials. Do more with Docusign.

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

Resources	Links
APD Support	- apd.docusignsupport@odhsoha.oregon.gov (Put Docusign in the subject line)
Docusign Support Center	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

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