

# DocuSign-Guide for ICP Employee Provider Information Form

Version: May 8, 2025

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# Independent Choices Program (ICP) Employee Provider Information Overview

# ICP Employee Provider Information Overview

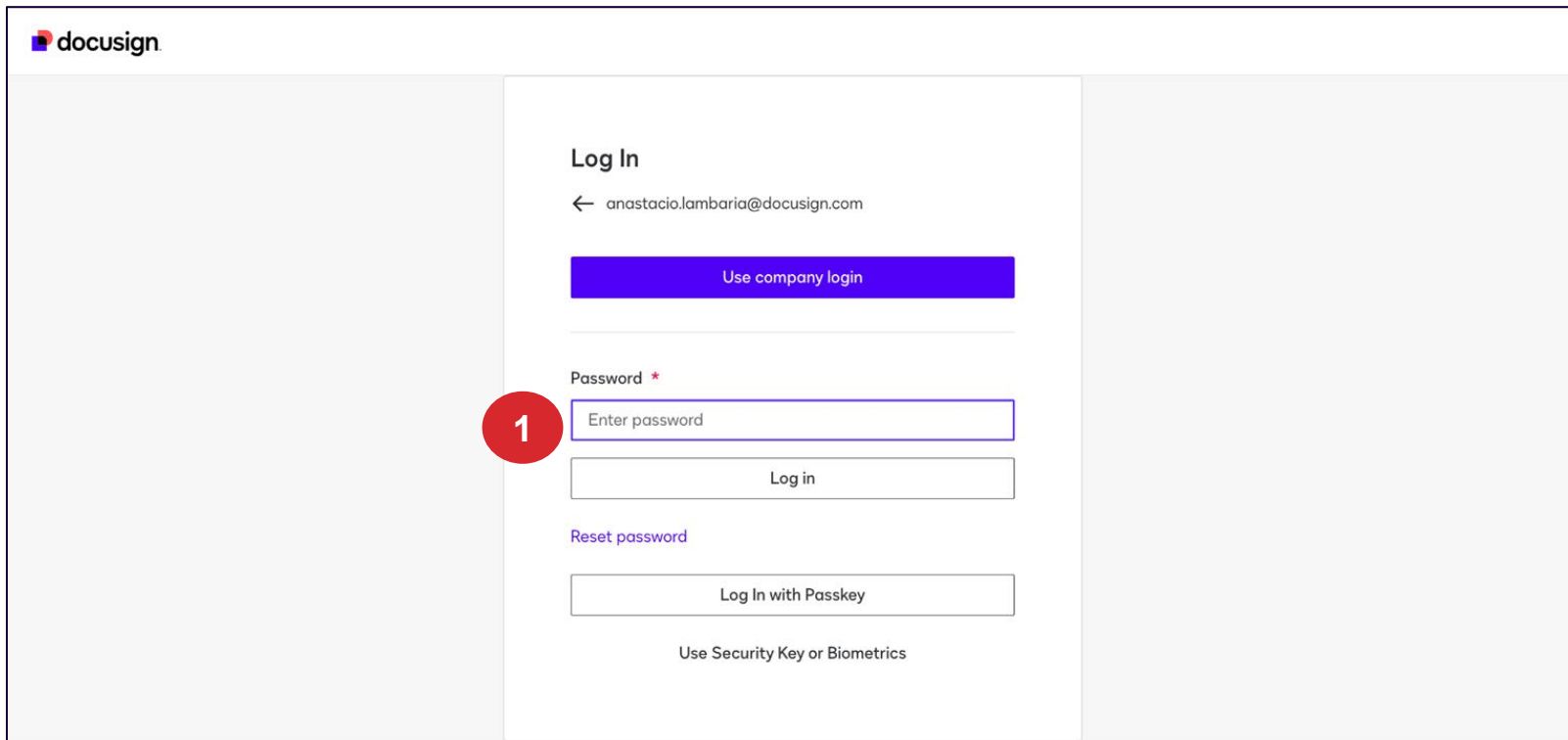
The ICP Employee Provider Information form is utilized to capture the ICP Participant details, capture the Case Manager (CM) Details, and then capture the Employee Details. The form is also set up to only show the details for each employee to each employee. The participant has visibility to the entire 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](https://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 separator line follows. The "Password \*" section features a red circle with the number "1" next to a text input field containing the placeholder "Enter password". Below the input field is a "Log in" button. A link for "Reset password" is located below the login button. At the bottom, there is a "Log In with Passkey" button and a link for "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 links 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. Below the navigation bar, a dark blue header bar contains a red circle with the number '1' next to an information icon and the text 'APD - Medicaid Services and Supports - Production'. The main content area features a 'Welcome back' message with the user's name 'Alex Lambaria' and a profile picture. To the right of the welcome message, there are four large circular icons representing different stages: 'Action Required', 'Waiting for Others', 'Expiring Soon', and 'Completed'. Above these icons is the text 'Last 6 Months'. A red circle with the number '2' is positioned over the 'Completed' icon. Below the welcome message, there is a dashed box containing the text 'Sign or get signatures' and an orange 'Start' button with a dropdown arrow. On the right side of the interface, a user profile 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 menu includes options for 'Manage Profile', 'Switch Account', 'My Preferences', and 'Log Out'.

Home Agreements Templates Reports Admin

APD - Medicaid Services and Supports - Production

Welcome back

Last 6 Months

0 Action Required

0 Waiting for Others

0 Expiring Soon

0 Completed

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 (one-1).

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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

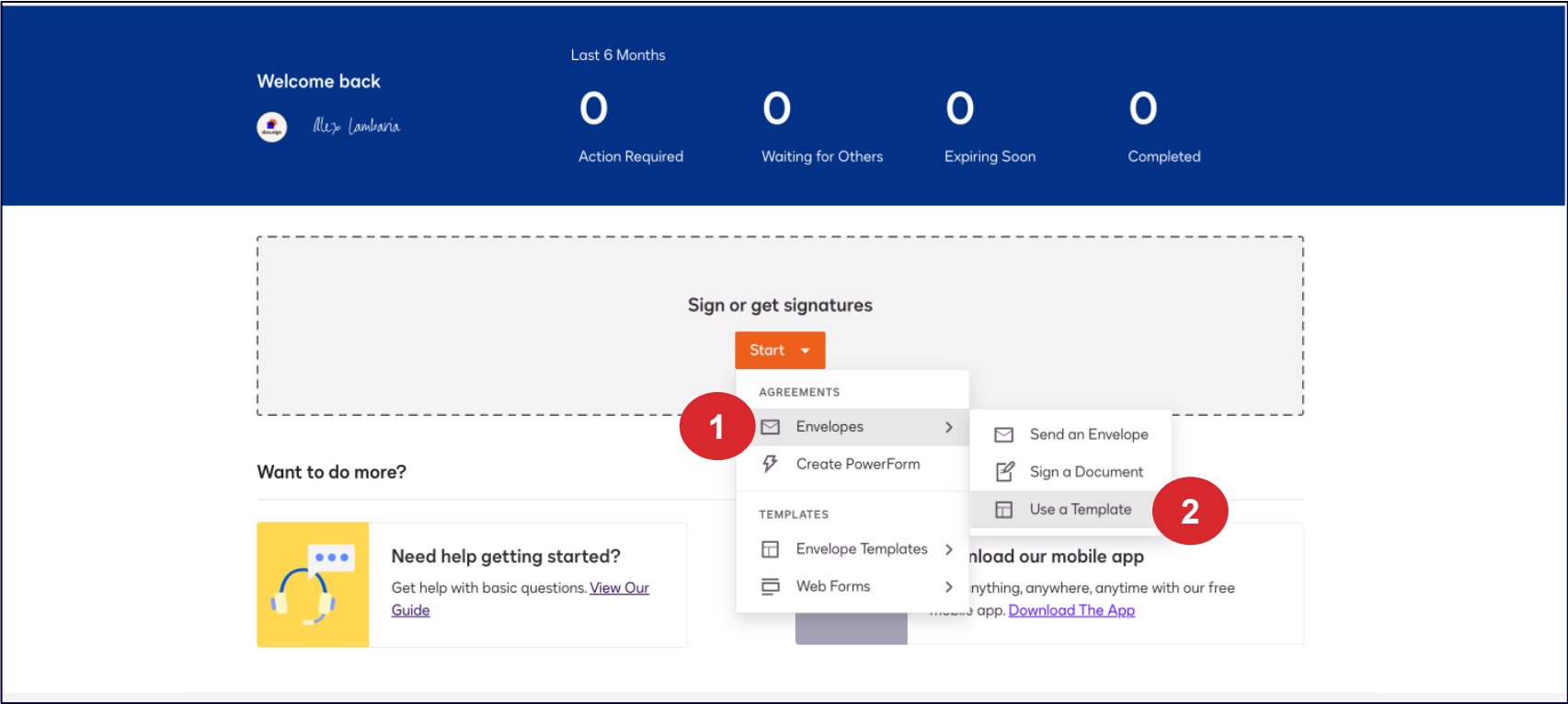
Sign or get signatures

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

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

Name \*

Delivery \*

☒ Email ☐ SMS (Text)

Email \*

+1 Phone number

Employee 1

Needs to Sign


Customize

Name \*

Delivery \*

☒ Email ☐ SMS (Text)

Email \*

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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

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.

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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 forms in a vertical stack. Each form has a title bar with the participant name, a 'Needs to Sign' status, and a 'Customize' dropdown. The forms are labeled 'Participant', 'Employee 1', and 'Employee 2'. Each form contains a 'Name' field with a user icon, a 'Delivery' section with 'Email' (checked) and 'SMS (Text)' (unchecked) options, an 'Email' field, and a 'Phone number' field. The first two forms are enclosed in solid red rounded rectangles, and the third is enclosed in a dashed red rounded rectangle. Red circles with the numbers '1' and '2' are placed to the right of the first two forms, respectively.

**Participant** Needs to Sign Customize

Name \*

Delivery \*

☒ Email ☐ SMS (Text)

Email \*

+1 Phone number

**Employee 1** Needs to Sign Customize

Name \*

Delivery \*

☒ Email ☐ SMS (Text)

Email \*

+1 Phone number

**Employee 2** Needs to Sign Customize

Name \*

Delivery \*

☒ Email ☐ SMS (Text)

Email \*

+1 Phone number

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.

[[Participant\_UserName]], Please Docusign: ICP Employee Provider(s) Information

Wayne Sneag

201%

SHORTCUTS

Search Fields

Standard Fields

Signature

Initial

Date Signed

Name

Email

Company

Title

Text

Number

Checkbox

Dropdown

Radio

Payment Item

Drawing

Formula

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:

Documents

ICP\_Employee\_Provide

Pages: 4

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:

The screenshot shows a web-based form titled "Oregon Department of Human Services" and "Independent Choices Program (ICP) Employee Provider(s) Information". The form is in a pre-fill view, indicated by the "PREVIEW" button in the top right. The form contains several sections for data entry:

- For Addresses, Select Mailing or Physical Address checkbox; or Both checkboxes if different**
- ICP participant profile**
- Name:** Text field
- Date of birth:** Text field
- Mailing address:** Text field
- City:** Text field
- State:** Select dropdown
- Zip:** Text field
- Physical address:** Text field
- City:** Text field
- State:** Select dropdown
- Zip:** Text field
- Participant phone #:** Text field
- Participant prime #:** Text field
- Participant email:** Text field
- CM name:** Text field
- CM phone #:** Text field
- CM email:** Text field

The "CM name", "CM phone #", and "CM email" fields are highlighted with a red box. Below these fields, there is a section titled "Please check all that apply for the participant or their ICP Representative:".

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.

Wayne Sneag

Search Fields

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

ACTIONS

PREVIEW

SHORTCUTS

Documents

ICP\_Employee\_Provide

Pages: 4

Pages: 1

BACK

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).

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Home

Agreements

Templates

Reports

Admin

1

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	
<div><input type="checkbox"/></div> <div>Independent Choices Program Forms for PP To: Alex Lambaria, Peter Participant <a href="#">+2 more</a></div>	<div></div> Completed	3/10/2025 04:37:09 pm	<div>2</div> <div>Download</div> <div></div>

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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 'Start' button and a 'Shared Access' dropdown. Below these, the 'ENVELOPES' section is expanded, showing 'Inbox', 'Sent', 'Completed' (highlighted with a red box), 'Action Required', 'Drafts', 'Deleted', and 'Waiting for Others'. A red dashed arrow points from the 'Completed' status to the 'Download files' dialog box. The dialog box, titled 'Download files', contains the instruction 'Select which files you want to download:' and a list of options: 'All' (7 files), 'Document' (6 PDFs), 'Certificate of Completion' (1 PDF), and 'Combine all PDFs into a single file' (highlighted with a red box). A blue 'Download' button is at the bottom right of the dialog. Another red dashed arrow points from the 'Download' button in the dialog to the 'Download' button in the document list on the right. The document list on the right shows a table with columns for 'LAST CHANGE' and 'Download'. The first row shows a change on 3/19/2025 at 03:31:28 pm, with a 'Download' button highlighted by a red box. A red arrow points from this button to the 'Download' button in the dialog box.

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

DocuSign navigation bar: Home, **Agreements**, Templates, Reports, Admin. User: Oregon Department of Human Services.

APD - Medicaid Services and Supports -

**Sent**

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

	NAME	STATUS	LAST CHANGE	
<input type="checkbox"/>	Participant Paul, Please DocuSign: ICP Employee Provider(s) Information To: Participant Paul, Employee 1 <a href="#">+1 more</a>	Completed	3/19/2025 03:31:28 pm	Download
<input type="checkbox"/>	Participant Paul, Please DocuSign: ICP Employee Provider(s) Information To: Participant Paul, Employee Ed <a href="#">+1 more</a>	Completed	3/19/2025 03:19:28 pm	Download
<input type="checkbox"/>	Participant, Please DocuSign: ICP Employee Provider(s) Information To: Participant, Employee 1 <a href="#">+1 more</a>	Completed	3/18/2025 11:58:59 am	Download
<input type="checkbox"/>	Participant Paul, Please DocuSign: ICP Employee Provider(s) Information To: Participant Paul, Employee Ed <a href="#">+1 more</a>	Voided	3/18/2025 11:30:25 am	Copy
<input type="checkbox"/>	Independent Choices Program Forms for dd	Voided	3/17/2025 02:24:10 pm	Copy

**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
<input type="checkbox"/> Participant Paul, Please DocuSign: ICP Employee Provider(s) Information To: Participant Paul, Employee Ed <a href="#">+1 more</a>	<input checked="" type="radio"/> Voided	3/18/2025 11:30:25 am
<input type="checkbox"/> Independent Choices Program Forms for dd	<input checked="" type="radio"/> 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.

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	
<input type="checkbox"/>	Participant Paul, Please DocuSign: ICP Employee Provider(s) Information To: Participant Paul, Employee 1 <a href="#">+1 more</a>	Completed	3/19/2025 03:31:28 pm	<div>Download</div> <div>Move</div> <div>Forward</div> <div>Copy</div> <div>Copy With Field Data</div> <div>Save as Template</div> <div>History</div> <div>Transfer Ownership</div> <div>Export as CSV</div>
<input type="checkbox"/>	Participant Paul, Please DocuSign: ICP Employee Provider(s) Information To: Participant Paul, Employee Ed <a href="#">+1 more</a>	Completed	3/19/2025 03:19:28 pm	
<input type="checkbox"/>	Participant, Please DocuSign: ICP Employee Provider(s) Information To: Participant, Employee 1 <a href="#">+1 more</a>	Completed	3/18/2025 11:58:59 am	
<input type="checkbox"/>	Participant Paul, Please DocuSign: ICP Employee Provider(s) Information To: Participant Paul, Employee Ed <a href="#">+1 more</a>	Voided	3/18/2025 11:30:25 am	
<input type="checkbox"/>	Independent Choices Program Forms for dd To: Wayne Sneag, Wayne Sneag	Voided	3/17/2025 02:24:10 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 shows the DocuSign 'Sent' envelope list. The interface includes a top navigation bar with 'Home', 'Agreements', 'Templates', 'Reports', and 'Admin'. The user is logged in as 'APD - OPIM - Demo Account'. The left sidebar shows the 'Sent' folder selected. 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 'OPI-M Application for Calvin Client' envelope.

NAME	STATUS	LAST CHANGE	FOLDER
<input type="checkbox"/> OPI-M Application for Calvin Client 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... 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... 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... 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... 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? 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

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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.

DocuSign

Home

Agreements

Templates

Reports

Admin

?

Oregon Department of Human Services  
Social Services - Independence

1

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

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**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 area shows a list of 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 'Authorization for Electronic Verification of Resources for Calvin Client...' envelope.

NAME	STATUS	LAST CHANGE	FOLDER
<input type="checkbox"/> OPI-M Application for Calvin Client 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... To: Alex Lambaria, Calvin Client <a href="#">+2 more</a>	Voiced	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... 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... 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... 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 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:

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.

[Home](#)
[Agreements](#)
[Templates](#)
[Reports](#)
[Admin](#)

[APD - OPIM - Demo Account](#)

Start

Shared Access

ENVELOPES

Inbox

Sent

Completed

Action Required

Show More

PowerForms

## Inbox

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

English (US)

Contact Us

Terms of Use

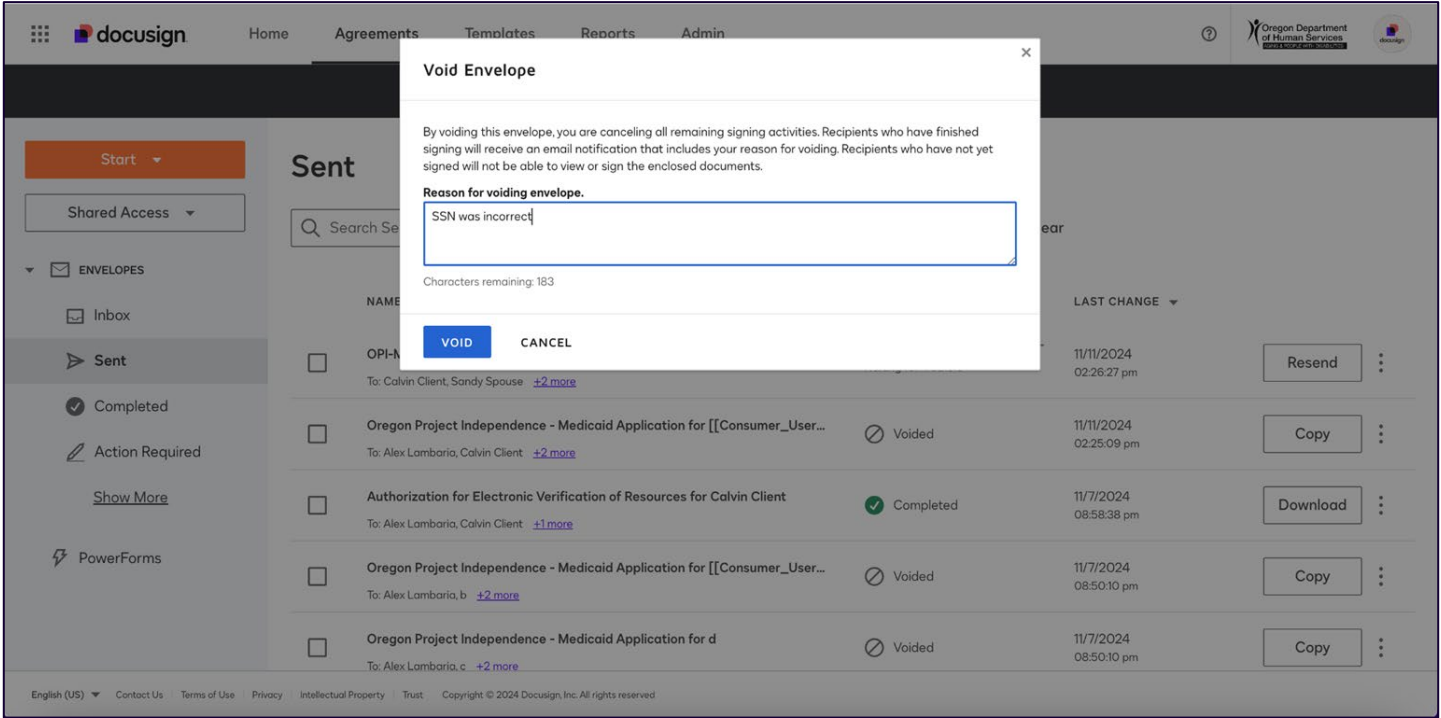
Privacy

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.

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	
<input type="checkbox"/>	OPI-M Application for Calvin Client To: Calvin Client, Sandy Spouse <a href="#">+2 more</a>	<div>Waiting for 4 others</div>	11/11/2024 02:26:27 pm	<a href="#">Sent</a>	Resend
<input type="checkbox"/>	Oregon Project Independence - Medicaid Application for [[Consu... 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>	Copy
<input type="checkbox"/>	Authorization for Electronic Verification of Resources for Calvin Cli... 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>	Download
<input type="checkbox"/>	Authorization for Electronic Verification of Resources for Calvin Cli... 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>	Download
<input type="checkbox"/>	Authorization for Electronic Verification of Resources for Calvin Cli...	Completed	11/7/2024	<a href="#">Sent</a>	Download

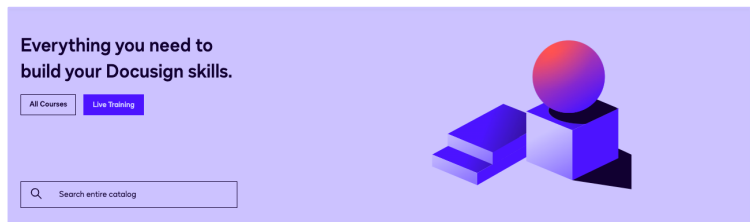
# Appendix

# Additional Guides From DocuSign Support

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

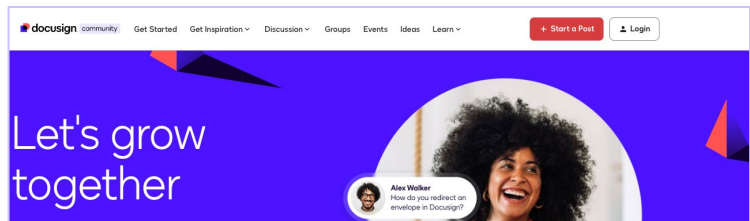
# Training and Support Sites



## Docusign University

Learn more. Build expertise.

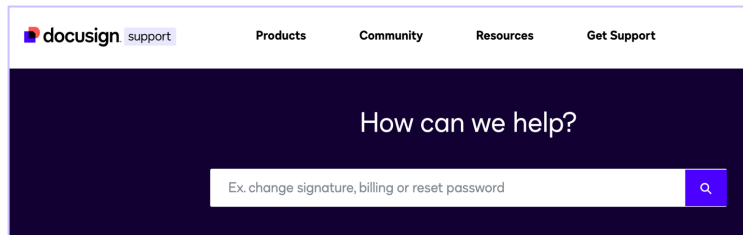
<https://support.Docusign.com/DocuSignUniversity>



## Docusign Community

Learn from the community. Discover customer solutions

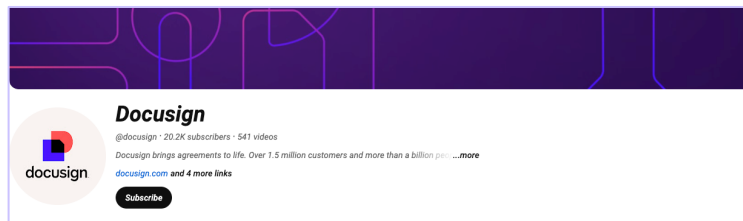
<https://community.Docusign.com/>



## 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
<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>

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