

DocuSign Frequently Asked Questions (FAQ)

May 9, 2024

Where do I go for help?

- ODDS has created an email box for Case Management Entities (CMEs) to email for assistance with ODDS forms that are available to sign using DocuSign:
odds.docusign@odhsoha.oregon.gov

How do I access these forms?

- Please use the links below to access these available forms:
 - [Individual Support Plan Change Form](#)
 - [Individual Support Plan \(Individual/Legal Guardian only\)](#)
 - [Individual Support Plan \(Support Providers only\)](#)
 - [Freedom of Choice](#)
 - [Notification of Rights](#)

Can I upload multiple attachments on the Individual Support Plan (ISP) and Change Form?

- Yes, you can upload more than one attachment.

How do I flatten a PDF for upload?

- Open the ISP form, click on **File >> Menu >> Print**. In the dialogue box, for Printer, select “**Adobe PDF**” as the option from the drop-down menu and click print. You will be prompted to select a location to save the PDF.

Will DocuSign replace the current process of filling out, reviewing and signing forms?

- No, the process of filling out documents and reviewing with clients will remain the same. DocuSign will only be used to gather electronic signatures. This process is an additional tool Services Coordinators/Personal Agents can use to gather electronic signatures.
 - If clients are not able to sign electronically, we recommend not using DocuSign and using physical or “wet” signatures.

How can individuals with disabilities and no guardian sign the forms?

- First, get a physical signature from anyone authorized to sign on their behalf, then use DocuSign to gather electronic signatures from any other required signers. All you must do is upload a copy of the ISP that was first signed physically.
 - Do not enter the name or email address of anyone who has physically signed.
 - Only enter the names and email addresses of those who will be signing electronically.

Most of my in-home clients do not have access to email. How can they sign?

- This process is an additional tool to send out documents and gather electronic signatures. For those who do not have access to email, we recommend continuing the process you currently use to review and sign documents.

Is there a separate page for every single person who signs?

- No, all recipients will sign on the same page, except for the ISP form that has one form for Individuals/Legal Guardians only and one form for Support Providers and others.

Can I upload multiple attachments?

- Yes, you can upload more than one attachment.

Do I have to include both the individual receiving services and their legal guardian?

- No, you can enter both or just one. For example, if the legal guardian is authorized to sign on behalf of the individual, you only need to enter the guardian's name and email address. DocuSign will route to the legal guardian only.

Can recipients sign on mobile devices?

- Yes, if they have access to email, they can review and sign on smartphones and tablets.

Is DocuSign email secure?

- Yes, DocuSign is HIPAA compliant, and all emails are encrypted. Find [more information about DocuSign's HIPPA compliance](#) in this eBook.

If someone's email changes, can you edit the original envelope?

- No, once the envelope is sent, you will not be able to modify the email address. You will need to restart the process.

What email address will recipients see when they receive the email?

- Recipients will see "Office of Developmental Disabilities Services via DocuSign" as the sender and the ODDS DocuSign email address (odds.docusign@odhsoha.oregon.gov) will appear in the email body. The email subject link will also include the Services Coordinator/Personal Agent's name.

Can you send the envelope back out for more signatures if you forget someone?

- No, you will have to restart the process.

Can I combine multiple forms on one email?

- No, all forms are separate by design.

Will this be available in multiple languages in the future?

- Currently, DocuSign automatically detects if the signer's browser is in another language and automatically translates the buttons and other user interface items, but not the document itself. We are working on adding additional languages to the available documents.

How can I download the signed and completed documents?

- After all recipients have signed, each recipient will receive an email where they can access the completed document. The email will have an option to download and save the PDF.