

## DocuSign PowerForms Cheat Sheet

Access the appropriate forms using links provided below. Senders will need to enter their name and email address and the names and email addresses of all other recipients **before** accessing the form.

*Each form contains additional instructions above the Services Coordinator/Personal Agent information.*

### Change Form

- Complete the form as you normally would.
- The electronic form is only used to gather signatures.
- Upload completed Change Form after accessing the PowerForm. The form notes where attachments can be uploaded.
- Recipients can view attachments as they scroll down the form.
- The name of the individual receiving services automatically populates **after** the form is submitted.
  - *You will not see the name when you initiate the form; recipients will see their name after it is sent.*
- Review the change form with the individual and ask for their agreement/consent to the plan before sending it out for signatures.

## Individual Support Plan (ISP)

**ISP one signature page**: all recipients sign on one page

**ISP two signature pages**: Individual/Guardian sign on one page, all other recipients sign on the second page

- Complete the ISP form as you normally would.
- The electronic form is only used to gather signatures.
- Upload the completed ISP after accessing the PowerForm. The form notes where attachments can be uploaded.
- Recipients can view attachments as they scroll down the form.
- The name of the individual receiving services automatically populates after the form is submitted.
  - *You will not see the name when you initiate the form; recipients will see their name after it is sent.*
- Review the ISP with the individual and ask for their agreement/consent to the plan before sending it out for signatures.

## Freedom of Choice

- The electronic form is only used to gather signatures; this form does not require any attachments to be uploaded.
- Services Coordinator or Personal Agent must fill out all fields highlighted in **red** before sending out the form.

**Note:** A witness is not needed when the individual or their legal representative is able to sign the form. A witness is only required when the recipient is unable to sign the form and a witness needs to document that person's choice.

## Notification of Rights

- The electronic form is only used to gather signatures; this form does not require any attachments to be uploaded.
- Services Coordinator or Personal Agent must fill out all fields highlighted in **red** before sending out the form