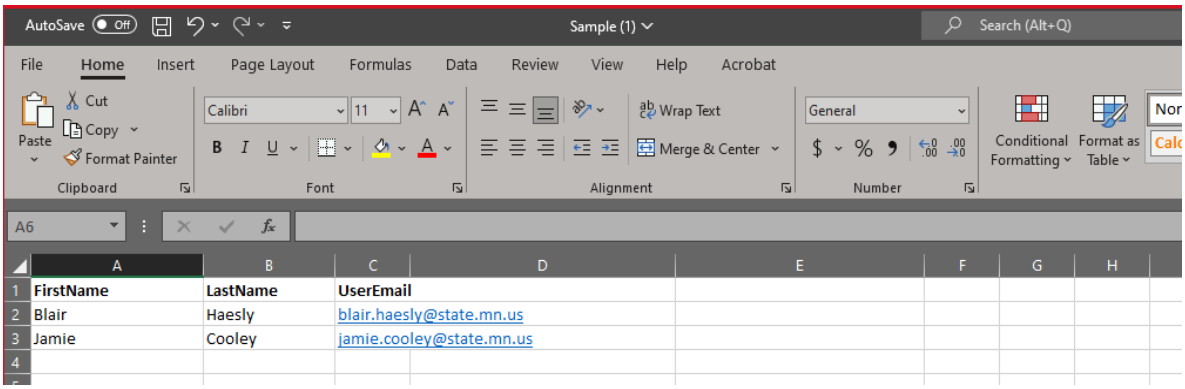
Local Agency Guidance for Implementing DocuSign

JULY 2023

Preparation for DocuSign

WIC Coordinators/supervisors request access for local agency users.

- Determine which staff need access to DocuSign.
  - Users can have access to multiple accounts. If your agency uses DocuSign and your staff already have an account with their work email address, they can also have an account through MDH WIC with the same email address. If your agency has claimed their email domain and is preventing outside access, MDH staff will reach out to you so you can work with your IT to allow outside account access.
- Local Agency coordinators can request access by submitting the WIC Information Users Request form, or if requesting for multiple users, by emailing a spreadsheet with staff first name, last name, and email address to your State WIC Consultant.



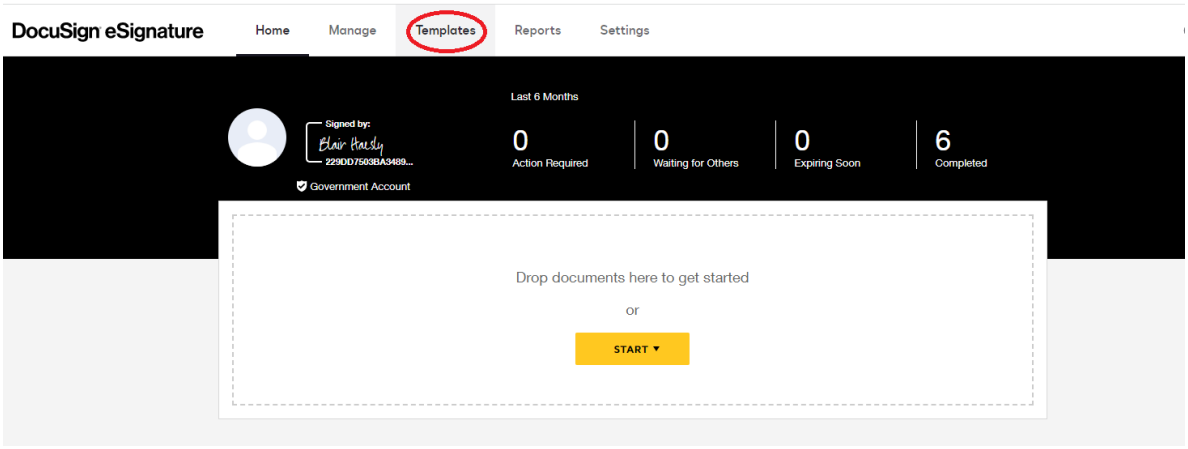
- MDH staff will create the account in DocuSign. Staff will then receive an email from DocuSign System to activate their account.

If choosing to use DocuSign for an agency specific form, e.g., Release of Information, send the form to your State WIC Consultant. MDH staff will add the form(s) to the agency's DocuSign platform.

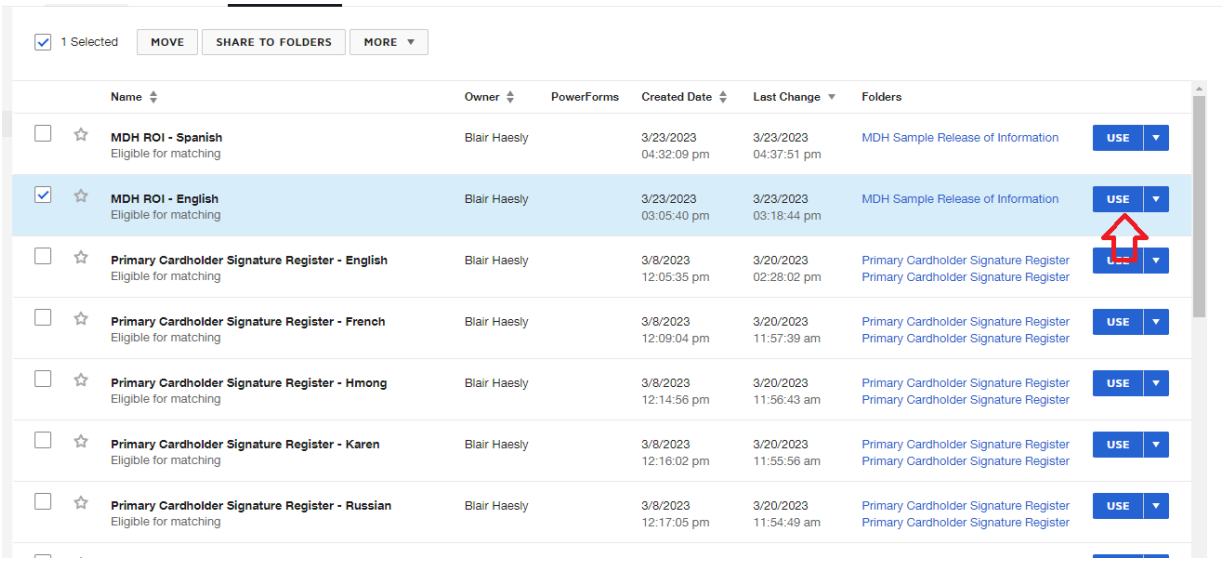
Agency staff should visit the DocuSign Getting Started as an eSignature User website to review four short training modules (about 2 minutes each) and the video library to become familiar with DocuSign.

Using DocuSign

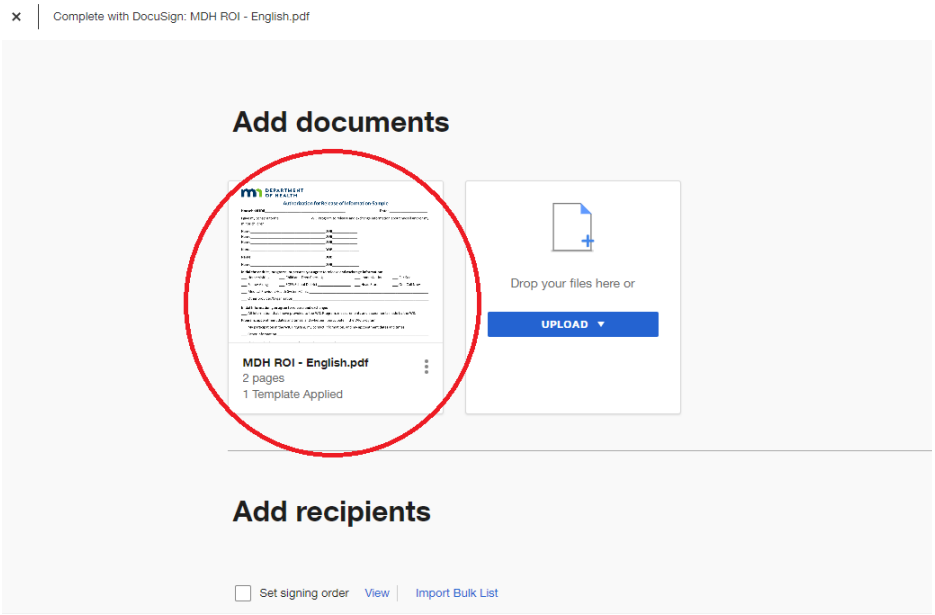
- **Always click the Never button** on the *Save password* pop-up message.
- Once logged in, choose the Templates tab at the top of the screen.



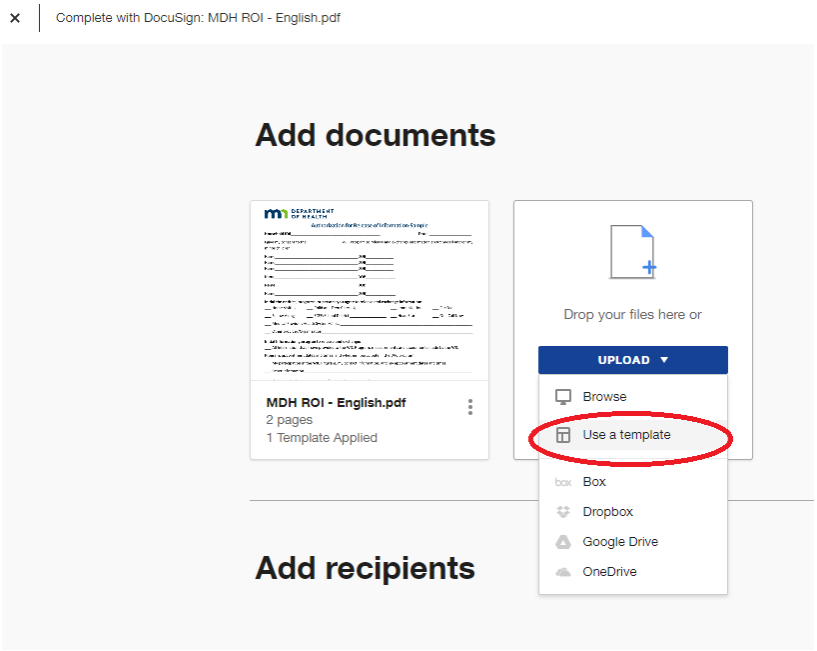
  - This gives access to MDH Templates and agency-specific templates (if applicable).
  - Current MDH Templates include the sample Release of Information (ROI) in English and Spanish, the Rights & Responsibilities in multiple languages, and the Primary Cardholder Signature Register in multiple languages.
- Select the Template(s) you would like to use.



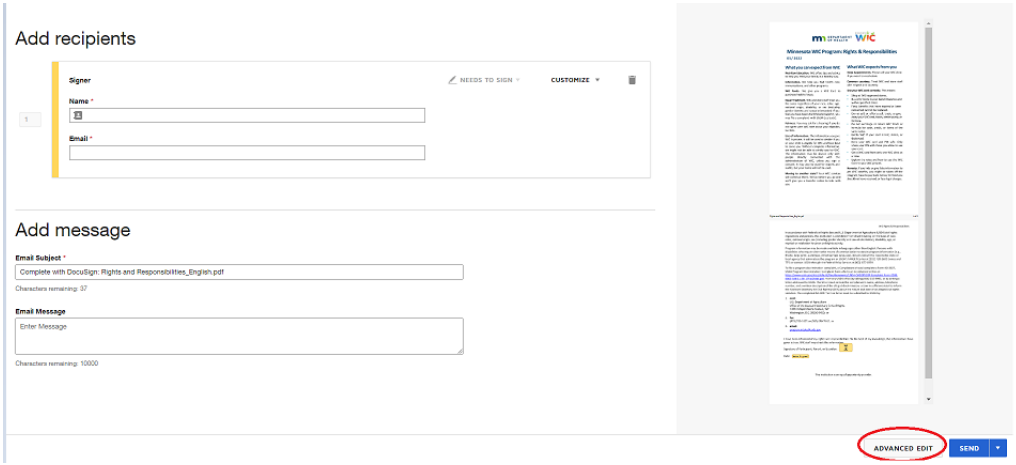
- The selected document will be shown under the Add documents section.



- If you are sending more than one document, select Upload in the area to the right of your document, then select Use a template.

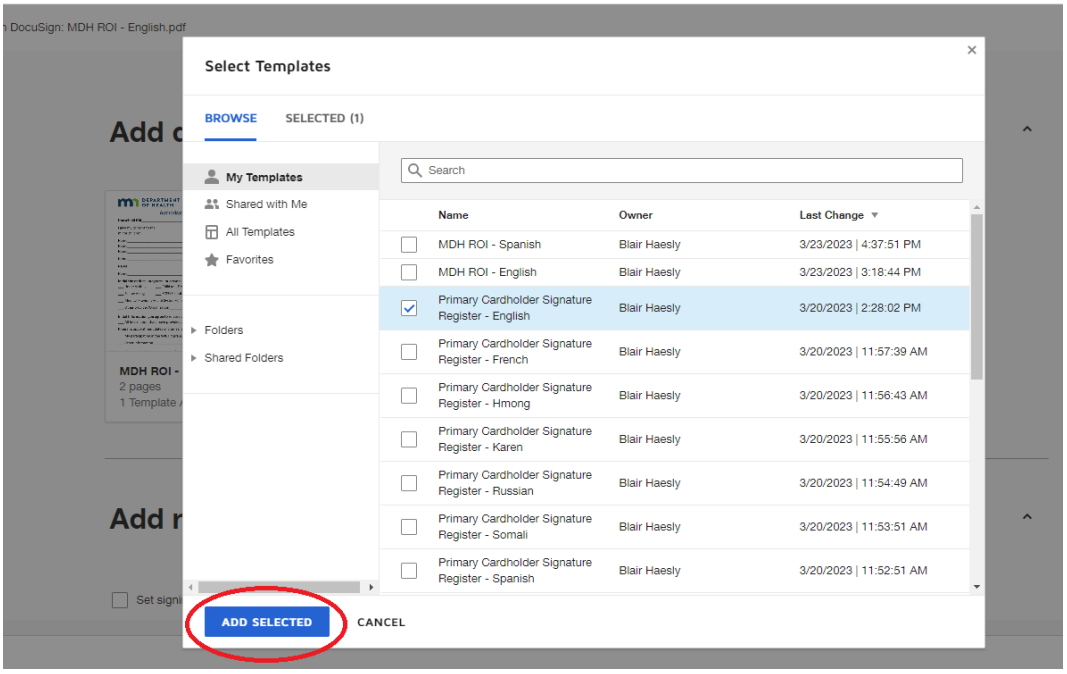


- If you are sending more than one document and the Add Documents section does not appear, select Advanced Edits on the bottom right.

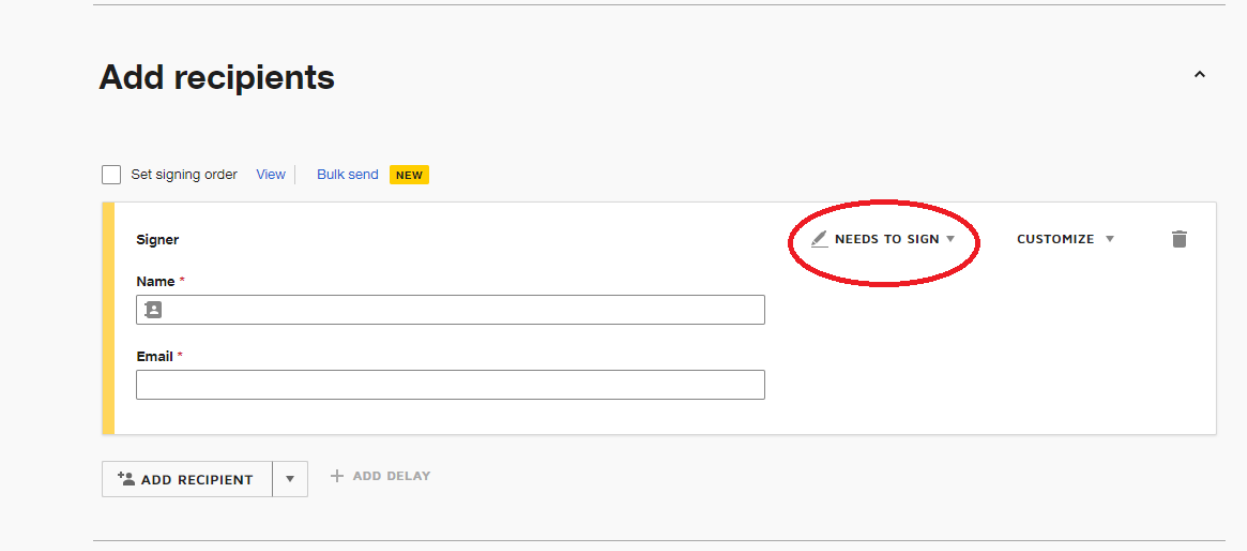


- Choose any additional templates you would like to send in this envelope to the participant, then select the blue Add Selected button.

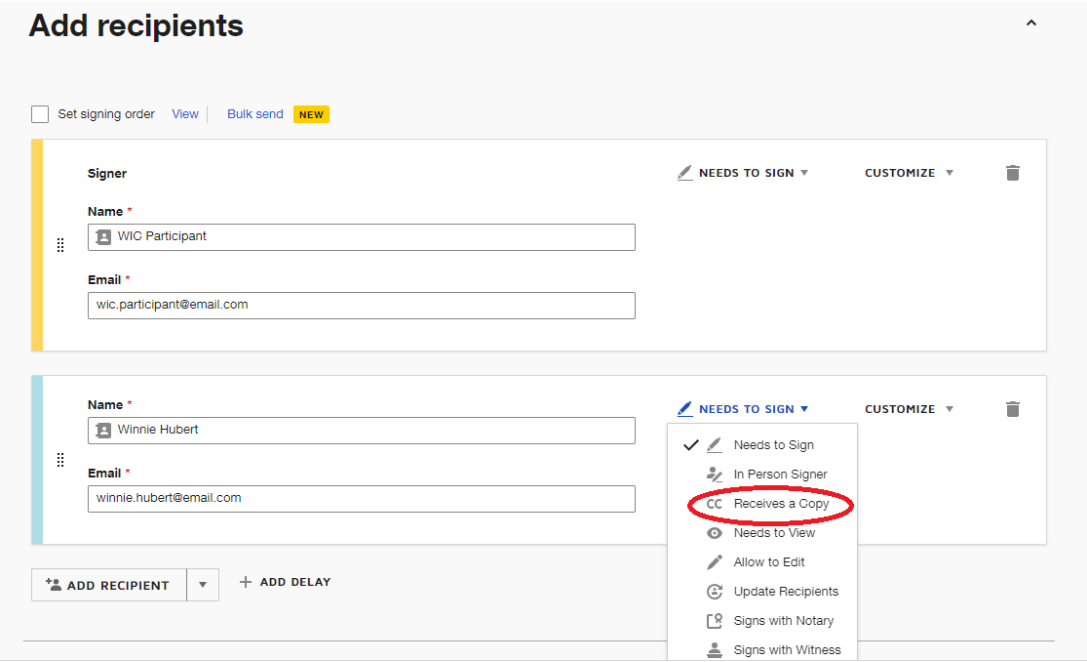
- A single template or multiple templates may be sent to a participant at one time. The documents are sent via email in an "envelope". There is a charge to the State WIC Office per envelope sent. Best practice is to send all documents to the participant in one envelope.



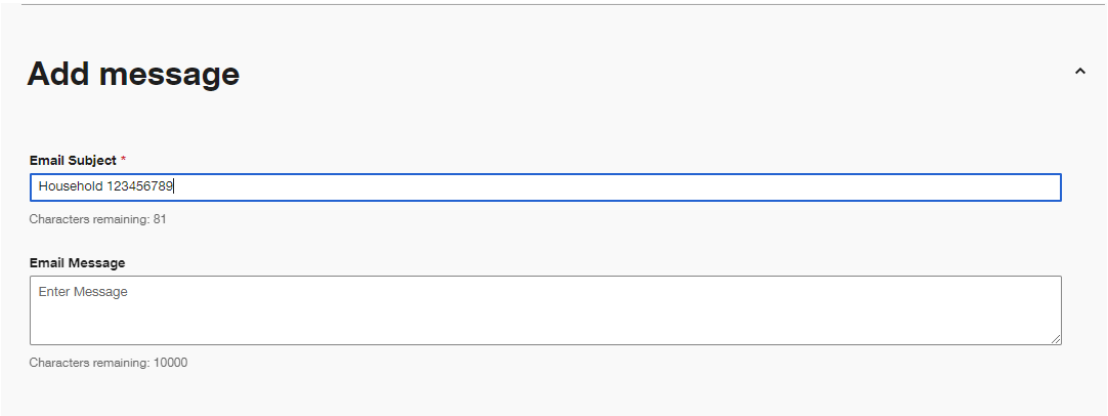
- Add recipients:
  - Enter the name of the participant to whom you will send the envelope.
  - Select Needs to Sign to the right of the participant's name. This must be selected so the signature is required.



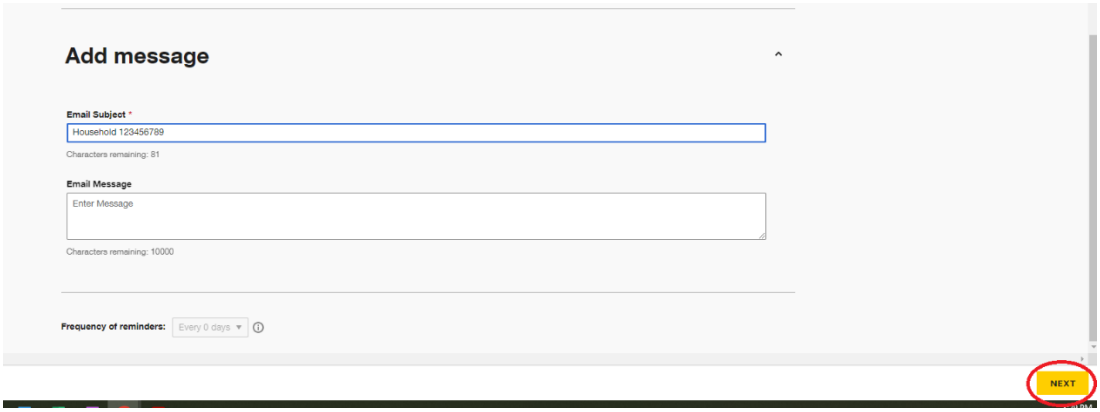
- The completed, signed document will automatically be sent to the sender. You may also add an additional recipient; for example, to send to your agency's generic email for others to view. Select Add Recipient, then enter the name and email address. To the right of the name, select CC Receives a Copy.



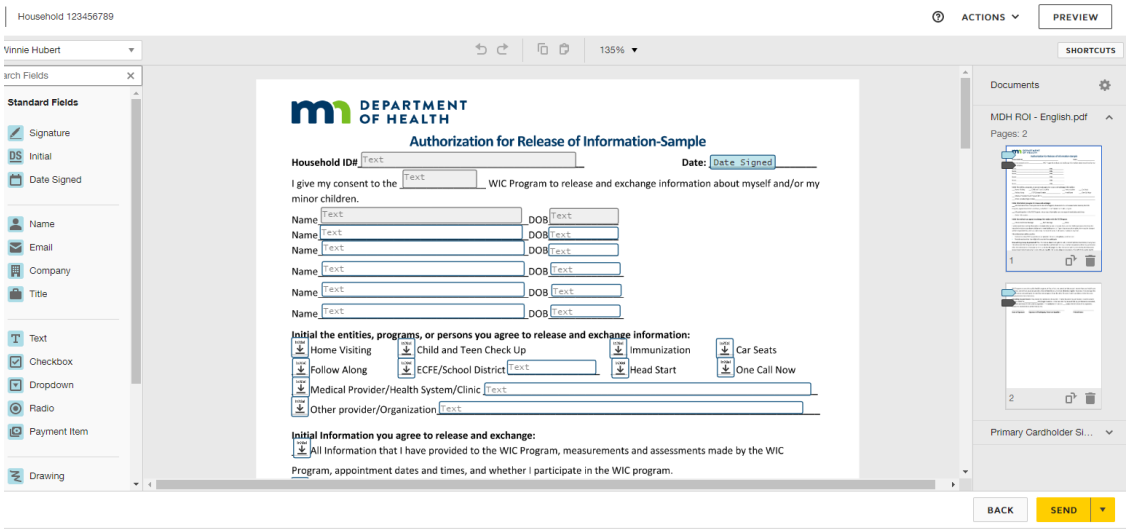
- The next section is *Add message.*
  - Update the prepopulated Email Subject with the participant's household ID. You may enter an email message for the recipient in the body of the email.



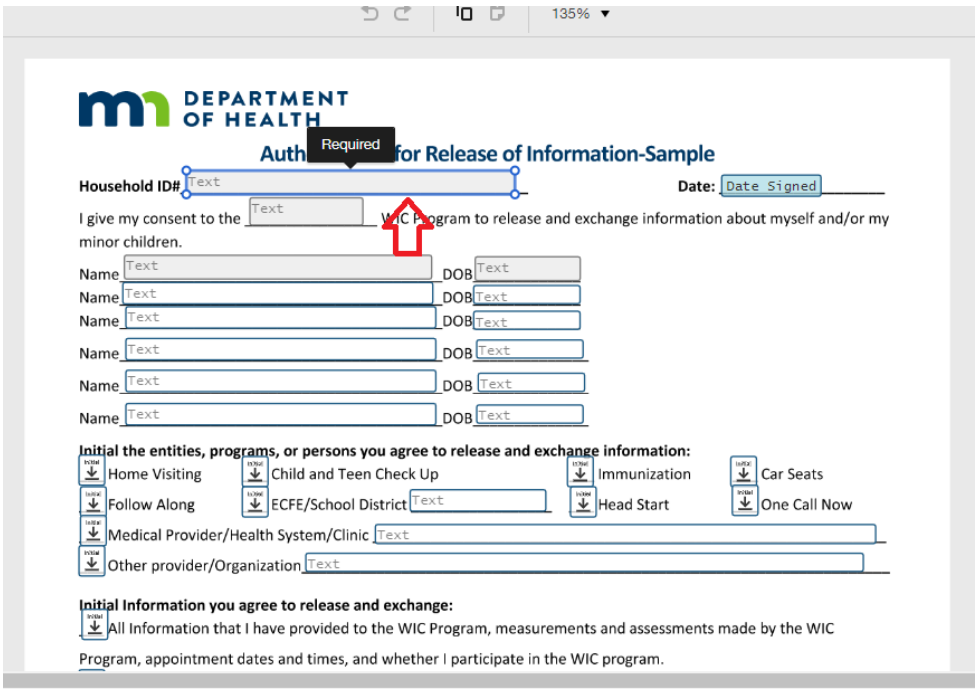
- Select Next at the bottom right of the screen to continue.



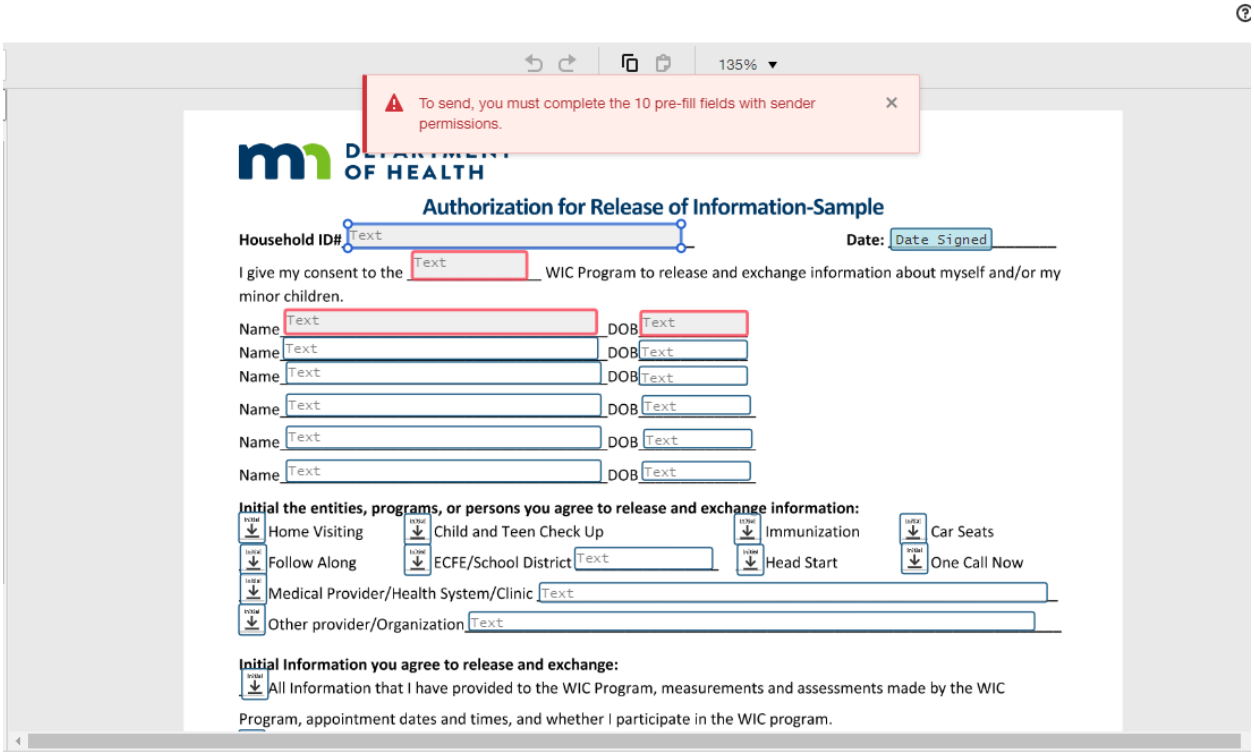
- The document(s) will appear in the next screen. You will see fields in the document(s) for text, date, initials, and/or signatures. Light gray fields are required by the sender. Transparent fields are optional and may be completed by the sender or the signer. Blue fields are required by the signer. Staff should complete text fields during their conversation with the participant and obtain permission from the participant before sending the envelope for signing. Participants can edit the optional fields as needed and uncheck any checked boxes. The required fields that the CPA completes before sending cannot be edited.



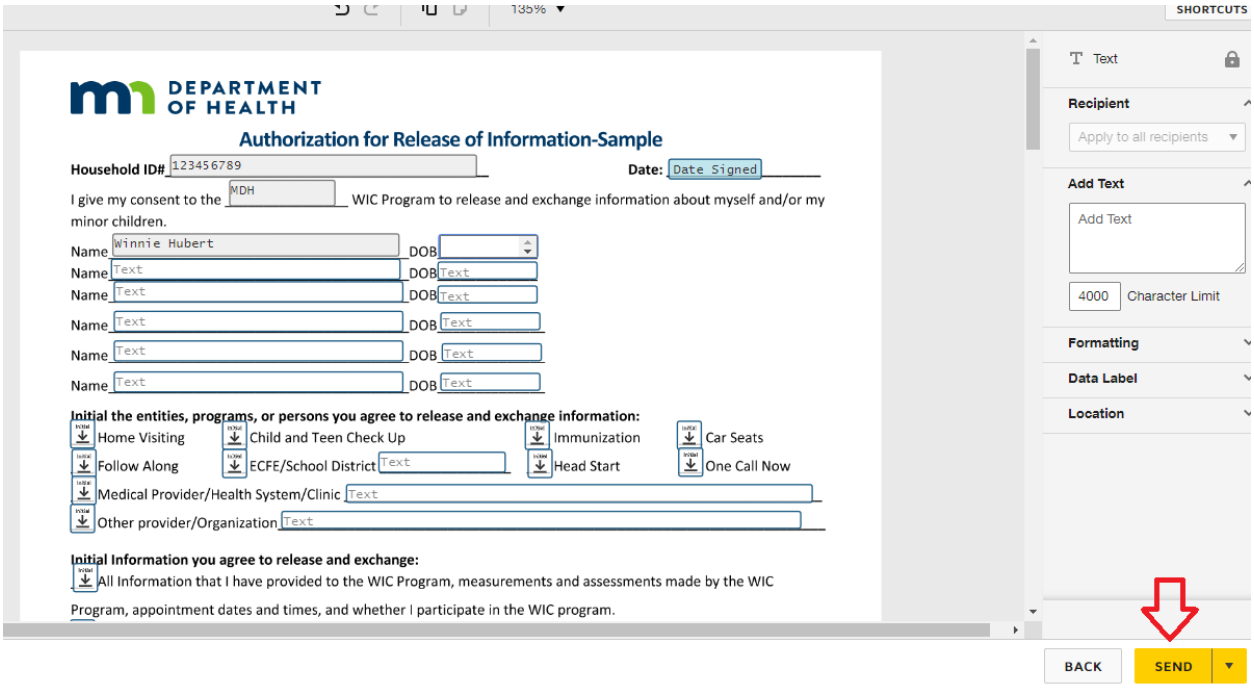
- To enter information into a field, select anywhere in the field with your mouse. You can then complete the field.



- If you try to send without completing required fields, there will be a notice that you must complete the fields to continue.

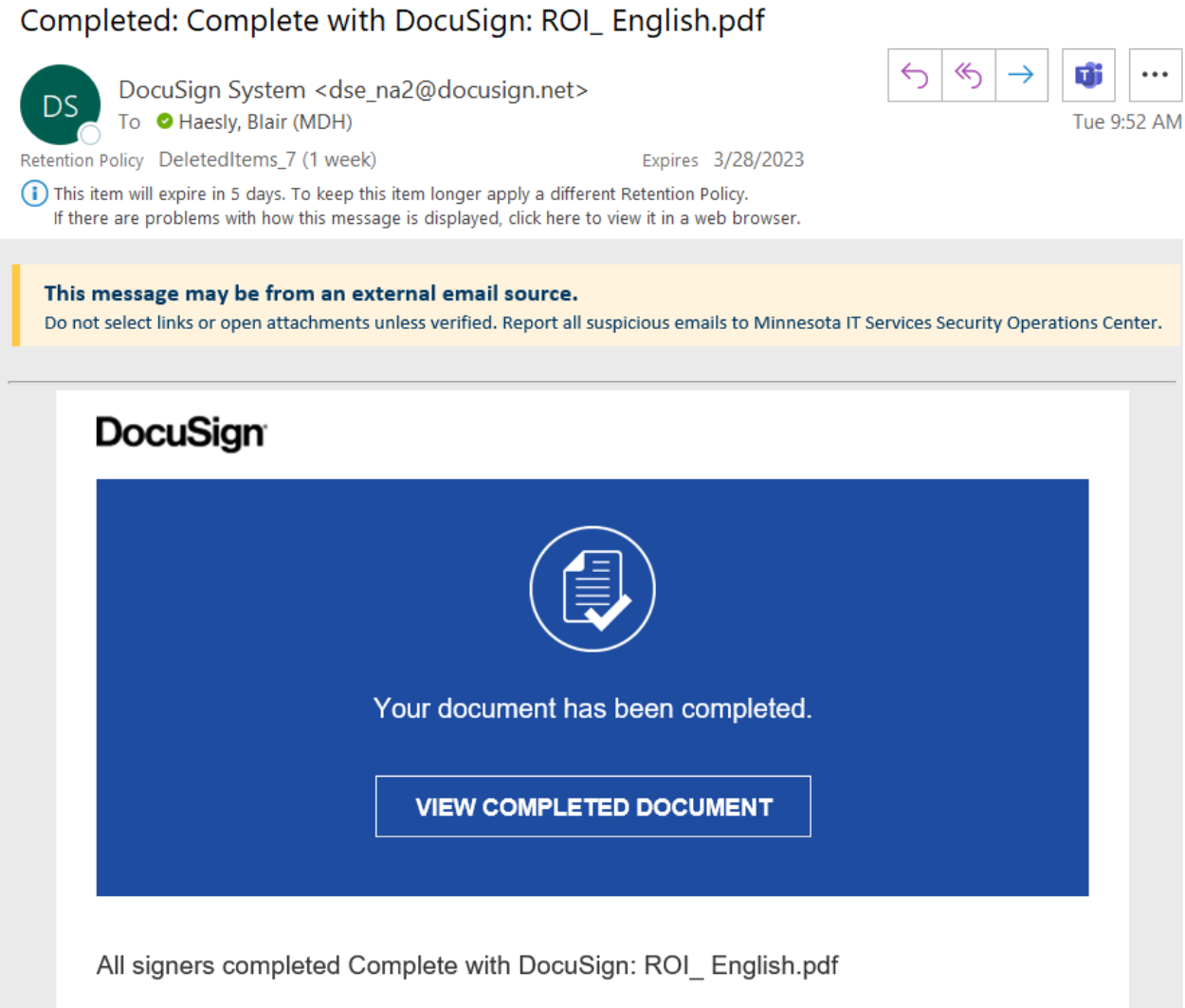


- When ready, select Send at the bottom right of the screen to send the document to the participant for signing.

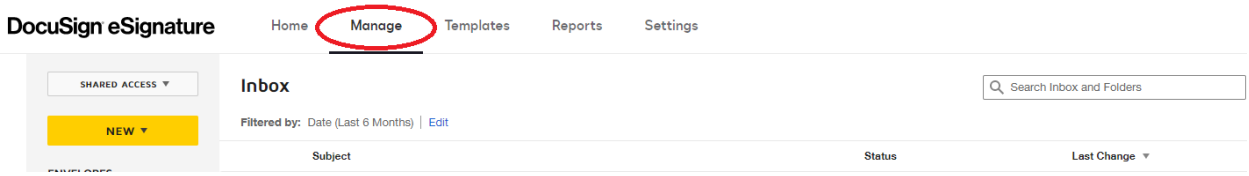


After Sending an Envelope

Walk through the emailed document with the participant while on the phone to ensure all information is completed, especially the optional fields. They will be required to sign the document. Once signed, the participant, the sender, and anyone else indicated to receive the completed document will receive an email indicating that the document has been completed.

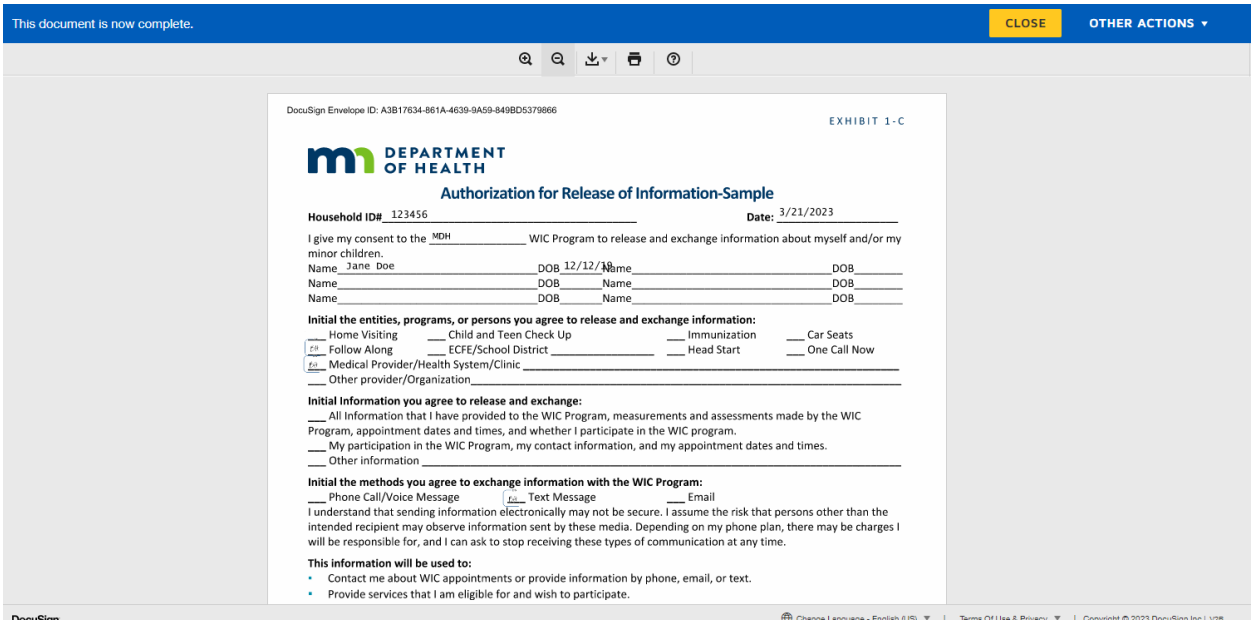


- Go to the Manage tab in DocuSign to view sent and completed documents.



- Download the PDF to print/scan into HuBERT or upload into WINNIE. Only the second, signed page of the Rights & Responsibilities needs to be saved in the WIC Information System.

- Completed documents will be stored in the DocuSign system for 14 days.



Additional Requirements

For data privacy, delete downloaded copies of the document and discard printed copies once the document has been saved in the WIC Information System.

If you are having the participant sign the Rights & Responsibilities via DocuSign, write “phone cert” on the signature pad for the participant; consultants will know to look for the participant’s signature on the scanned form. CPA signature will continue to be collected via the signature pad.

Best Practices

Prepare the envelope for sending prior to the appointment. Send all documents you would like signed at the end of the appointment. Stay on the phone while the participant is signing the document to help them with questions and ensure they complete signing.

Each email sent with documents for signing is called an envelope. Send all documents in one envelope. Let the participant know how many documents they will be asked to complete and sign.

Reference – Complete Listing of Hyperlinks

DocuSign Getting Started as an eSignature User (https://success.docusign.com/esignature/checklist/user?&utm_medium=email&utm_source=ac&utm_campaign=DigitalMicrosite)

Minnesota Department of Health - WIC Program, 625 Robert St N, PO BOX 64975, ST PAUL MN 55164-0975; 1-800-657-3942, health.wic@state.mn.us, www.health.state.mn.us; to obtain this information in a different format, call: 1-800-657-3942.

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