

## ADRC and Tribal ADRS Directions to Send a DocuSign

This document provides guidance to Wisconsin aging and disability resource centers (ADRCs) and tribal aging and disability resource specialists (ADRS) in how to complete and send a DocuSign Form for electronic signature.

### Considerations for using the DocuSign process

- The DocuSign process may only be used if all individuals required to sign have a valid email address and are able to consent and complete the electronic signature process.
- The DocuSign version of the enrollment and disenrollment forms may only be used if the enrollment or disenrollment dates are known at the time the form is completed.

### Steps for completing a DocuSign form

1. To access the DocuSign version of a required form search for the form number in the [DHS forms library](#) and select the DocuSign version.
2. Log in to your DocuSign Account. If you do not have an account, sign up for a DocuSign account: [Use DocuSign for free](#).
3. Complete the appropriate signing role as applicable. Only complete the signing roles that apply.
4. Enter the name and email address for each signer. This includes entering the name and agency email address for the ADRC specialist, tribal ADRS, or disability benefit specialist (DBS) in the required fields.

### PowerForm Signer Information

Fill in the name and email for each signing role listed below.  
Signers will receive an email inviting them to sign this document.

Please enter your name and email to begin the signing process.

#### ADRC/Tribal ADRS

Your Name: \*

Your Email: \*

Please provide information for any other signers needed for this document.

#### Customer

Name:

Email:

**Applies to:**  
**ADRC**  
**Tribal ADRS**  
**DBS**

**P-02009**  
**21-01A**

5. Select Begin Signing.
  - The ADRC specialist, tribal ADRS, or DBS will have the option to complete their role right away or at a later time. The ADRC specialist, tribal ADRS, or DBS will also receive an email from DocuSign to complete their role.
  - If you choose to complete the form right away, you must click the agreement to use electronic records and signatures.
6. Select Continue.
7. Select Start.
8. Complete all sections of the form assigned to your role.
9. Select Finish.
10. The individual, guardian, conservator, or POA will not receive the form until the ADRC specialist, tribal ADRS, or DBS completes their role.
11. After all, required signers, including the individual, guardian, conservator, or POA, signs the form, the sender (ADRC specialist, tribal ADRS, or DBS) and the signer(s) will receive an email with the signed document attached, and the signed document will appear in their DocuSign account.
12. You can now download a PDF copy, save, or print the document

Questions and concerns regarding the use of the form may be directed to:

- Your Office for Resource Center Development (ORCD) regional quality specialist, if you are an ADRC specialist or tribal ADRS.
- The DBS program manager, if you are a DBS.