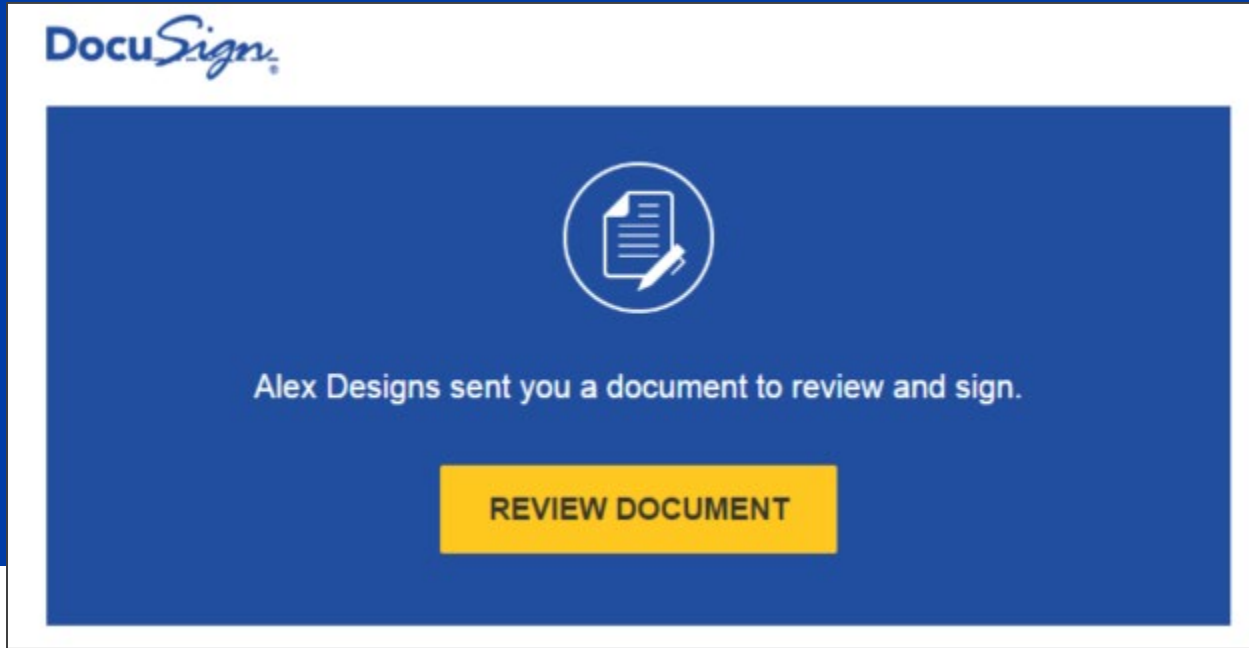**CONSUMER DIRECT CARE NETWORK**

WELCOME!

Figure 1: DocuSign Review Document

Consumer Direct Care Network (CDCN) utilizes a software called DocuSign to electronically enroll both Attendants and Employer of Records (EOR) onto CDCN services. Electronic packets are the easiest and most efficient way to enroll with CDCN.

Electronic packets:
1. Have built in data validation to make sure that you have correctly filled out all required fields.
2. Key demographic information is populated through to all necessary forms so you don't have to fill out the same information over and over again.
3. Are easily and securely submitted to CDCN once you have completed the packet.

Contents

EVERY LIFE. EVERY MOMENT. EVERY DAY   ©CDCN 2019

CONSUMER DIRECT CARE NETWORK

How to Get a Packet

1. **Go to the CDCN forms page** (Figure 2). Pick your program and then language preference.

2. **Click the link to the packet you need to complete** (Figure 3)**.**

3. **Click the Employer of Record (EOR) Enrollment or Attendant Enrollment** link to find the packet (Figure 3), then **choose the electronic packet** (Figure 4).
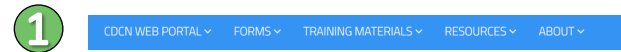

Figure 2: Forms tab on CDCN web page

Figure 3: Enrollment Packet Links

Figure 4: Enrollment Packet Links

Getting Started

4. **Fill out the PowerForm fields** (Figure 5)**.** This allows you to receive an email to complete the document.

5. **Complete your name and email address for the role that fits you best.**

   Note**:** Service Facilitators or EORs can send the packet to someone to complete by filling in their name and email address in the appropriate role.

   See the FAQs on page 6 if you don't have an email.

6. **Click the Begin Signing button.**

Figure 5: PowerForm Example

EVERY LIFE. EVERY MOMENT. EVERY DAY ©CDCN 2019

CONSUMER DIRECT CARE NETWORK

Email Validation

7. **The signer will get an email with a validation code** (Figure 6)**.** The email is sent from DocuSign and will have CDCN's name and logo on it.

   Note: You may need to check your email's junk or spam folder.

8. **Click the Resume Signing button to continue.** This will open a new window (Figure 7).

9. **Enter the access code from the email you got.** You can type this in or copy and paste from your email.

10. **Click the Validate button**.

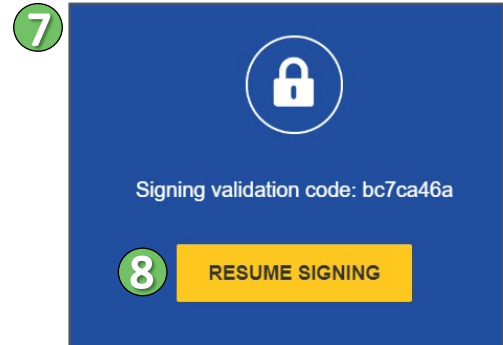   Click the I Never Received An Access Code button if you need a new code.

Signing validation code: bc7ca46a

RESUME SIGNING

Figure 6: Email Validation Example

Please enter the access code to view the document

Consumer Direct
Consumer Direct Care Network

An email has just been sent to your email address with a special validation code in it. To proceed to sign your documents please open your email, and enter the code into the box below. Keep this browser window open while you get your email.

Access Code
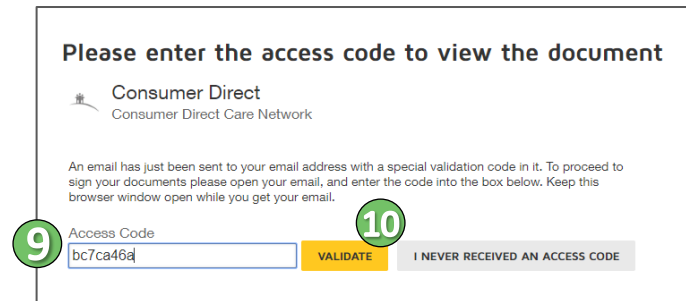bc7ca46a   VALIDATE   I NEVER RECEIVED AN ACCESS CODE

Figure 7: DocuSign Access Code Window

Filling Out the Packet

11. **Check the box** After you have read the Electronic Record and Signature Disclosure and agree to the information (Figure 8). Click the underlined words to read the disclosure.

    If you do not agree, please request a paper packet from your Service Facilitator.

12. **You can now begin filling out the packet!** See the FAQs on page 6 for estimated times to complete.

13. **Boxes outlined in red must to be filled out** (Figure 9). Boxes in gray are optional but it is good to fill them out if you have information that can be entered.
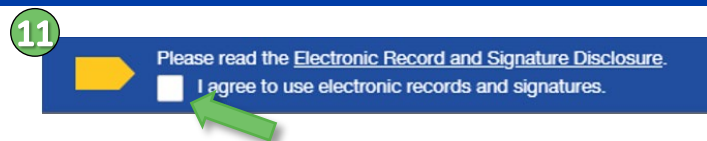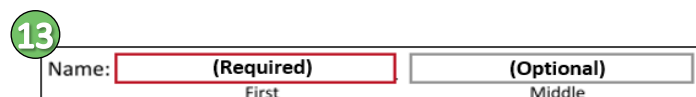

Please read the Electronic Record and Signature Disclosure.
I agree to use electronic records and signatures.

Figure 8: Electronic Record and Signature Disclosure

Name: (Required) First   (Optional) Middle

Figure 9: Required and Optional Fields

EVERY LIFE. EVERY MOMENT. EVERY DAY   ©CDCN 2019

Filling Out the Packet, cont.

14. **Hover your mouse over any field to get a quick tip about what to do (**Figure 10)**.**

Figure 10: Quick Tips and Data Validation

15. **Some fields must be entered a certain way**. You cannot complete the packet unless the information is entered correctly. The error will be in red text after the quick tip telling you what needs to be fixed.

    In this example only 4 digits were entered instead of 5 for the zip code.

16. **Go to the next field that needs to be filled out by pushing the Next button** (Figure 11)**.** You can also use the tab key on your keyboard or scroll through the document and click on the field that needs filled out.
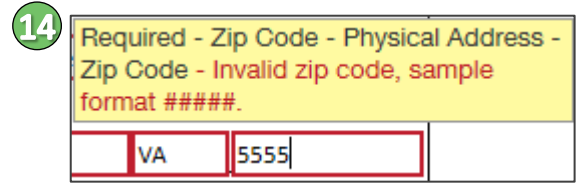

Figure 11: Next Button

How to Sign

17. **Click on the signature icon for places that need to be signed** (Figure 12).

Figure 12: Sign Icon

18. **An 'Adopt Your Signature' window will appear** (Figure 13).

19. **Sign your name in the 'Draw Your Signature' area**. Sign using your finger or a stylus if your device has a touch screen. Use your mouse or an electronic signature pad if you do not have a touch screen.
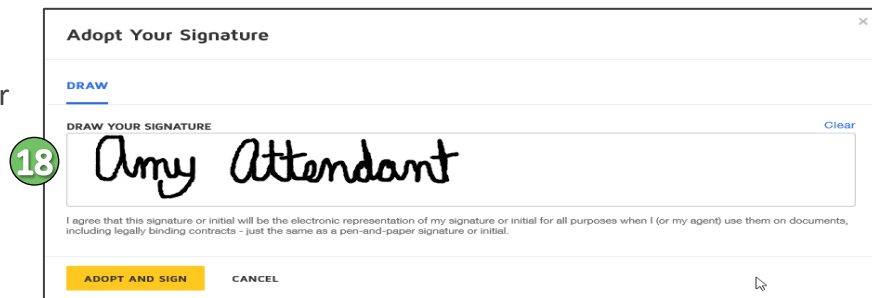Note: Use Clear to erase and start again.

Figure 13: Adopt Your Signature Window

20. **Click the 'Adopt and Sign' button to place your signature on the form** (Figure 14)**.**

Figure 14: Adopt and Sign Button

EVERY LIFE. EVERY MOMENT. EVERY DAY   ©CDCN 2019

Upload Forms

21. **If you see an icon with a paper clip, you will need to upload the additional document(s) requested** (Figure 15)**.**

    Note: Not all packets require other documents to be uploaded.

22. **Click the icon.** An Upload Attachment window will open (Figure 16).

23. **Click the Upload A File button.**

24. **Find the document(s) you need to include.**

25. **Click the Done button.** You will be able to see the document(s) you uploaded at the end of the packet.
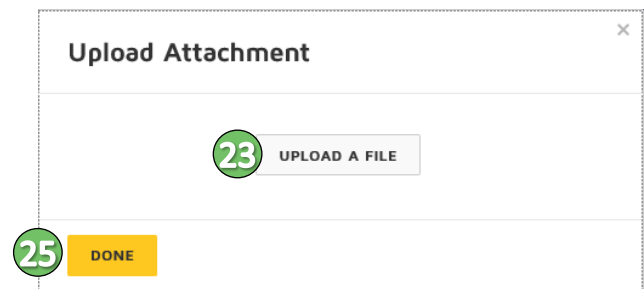
Figure 15: Upload Icon

Figure 16: Upload Attachment Window

How to Submit

26. **The Next button will disappear when all the required fields are filled out.** Please review your information to make sure it is correct.

27. **Click the Finish button to complete** (Figure 17)**.**

28. **A 'Save a Copy of Your Document' window will open.**

29. **To save a copy of your packet, click the Download or Print button** (Figure 18)**.** You will also get an email with a link to the completed packet that can be viewed at any time (Figure 19).

30. **Click the Close button when you are done saving or you do not wish to save a copy.**

31. **Your packet will be sent to the next signer if one is required or to CDCN to process.**

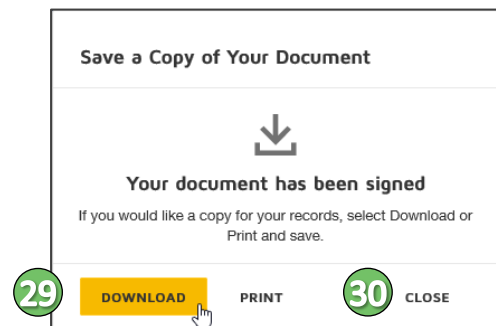*Figure 17: Finish Button*

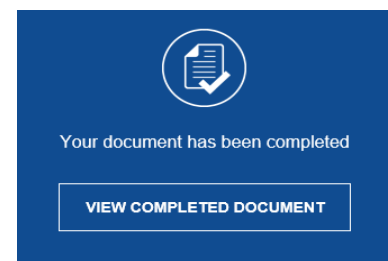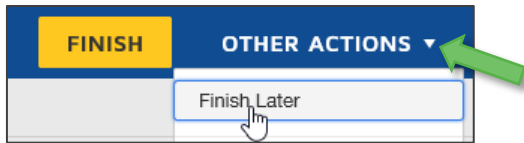*Figure 18: Save a Copy of Your Document Window*

Figure 19: Completed Document Email

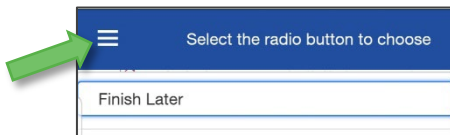EVERY LIFE. EVERY MOMENT. EVERY DAY   ©CDCN 2019

Frequently Asked Questions (FAQs)

Can I save my packet and finish later?
Yes. DocuSign saves your progress every 30 seconds. Select Finish Later from the Other Actions dropdown

or under the menu bars if you are using a device.

The Finish button does not appear.
If the Finish button is not appearing, it is due to one or more incomplete required fields. Once a page has had all required fields met a green check mark appears. If this does not resolve the issue, please reach out to the sender of the document to ask them to investigate.

I don't have an email address.
An email address is required to use DocuSign. Free email services are available. Some of the more popular ones include:
https://www.gmail.com
https://www.yahoo.com
https://www.outlook.com

How do I access the documents I signed?
https://support.docusign.com/en/articles/How-do-I-access-the-DocuSign-documents-that-I-signed

How do I contact the sender of this document?
DocuSign sends email notifications on behalf of its users. Simply "reply to" the email notification to contact the sender of the document with questions.

How long will it take to complete a packet?
Times listed are averages and may vary by individual.
- New EOR Enrollment: 15 minutes
- EOR Transition: 15 minutes

Attendant packets require 2 signers
- New Attendant Enrollment: 30 minutes
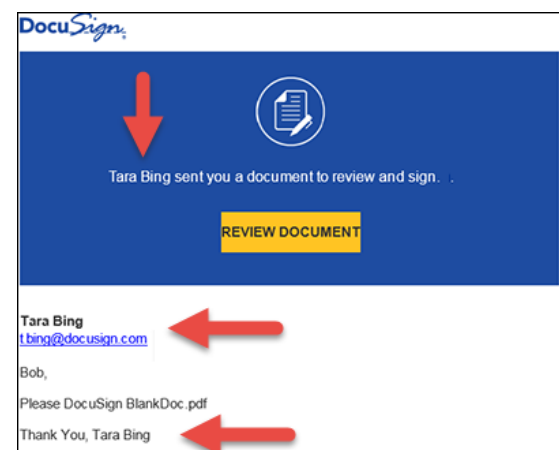- Attendant Transition: 30 minutes

What packet should I complete?
Please discuss with your Service Facilitator if you are unsure which packet to complete.

- New Enrollment Packet – for consumers & attendants who are new to self-direction
- Transition Packet – for consumers & attendants who are transitioning from one FEA to another
- EOR Change Packet – used when the EOR is changing for the consumer

How do I know who sent me this document?
The notification email you received contains the name and email address of the sender - to contact the sender, please use the email address included in the notification.

Other FAQs can be found on DocuSign's website:
https://support.docusign.com/en/articles/DocuSign-Signing-FAQs