

## DocuSign Form Signing Instructions

1. Please make sure you are using September 2021 forms (these forms have fillable boxes)
2. Type the required information into the purple boxes
3. Upload the filled in form into DocuSign
  - a. Please login to your DocuSign account from an internet browser. The app for tablets or smart phones does not enable all the functions of the form.
4. Assign the names and email addresses for the signatures, the signing order needs to be as follows:
  - a. Patient/caregiver/responsible party
  - b. Hospice or Palliative Care Team member
  - c. **YOU MUST CC [info@hpcfoundation.org](mailto:info@hpcfoundation.org) (If this is NOT done, we CANNOT process your request).**
5. In the pop up box choose to keep PDF Data
  - a. \* If you are using an Android Tablet such as a Samsung Galaxy instead of keeping PDF Data choose the option to "Assign to" and choose the patients name. This will auto fill the form with DocuSign fillable boxes. Please note you still need to insert the drawing boxes described below.
6. Insert the drawing boxes for signatures **(It must be a drawing box! Typed signatures will not be allowed!)**
  - a. For Adult or Pediatric Relief Fund Requests, you can attach documents such as invoices, verification letters, W9's etc. by inserting an attachment box in DocuSign or you can send them in a separate email to [info@hpcfoundation.org](mailto:info@hpcfoundation.org)
7. The subject line of the email **MUST** be the patient's last name and application type. For HIPPA purposes **NO** first names need to be included on the subject line.
  - a. Example) Smith Adult Relief Fund
8. On the right hand side of the screen, you will see the words Summary and Options.
  - a. Press Options
  - b. Adjust the expiration date to be 5 days from now.
9. Press send
  - a. The form will automatically be sent to the patient, once signed, the form will be sent back to the Hospice or Palliative Care Team member, after completion, the form will automatically be sent to the [info@hpcfoundation.org](mailto:info@hpcfoundation.org) email address. This allows us to verify the process.

**In person signatures through DocuSign are NOT allowed. The patient, caregiver, or responsible party must be emailed the form in order for electronic signatures through the inserted drawing box.**

- **If a patient does NOT have an email address, the forms will be need to be printed and signed.**