

DocuSign Form Signing Instructions

1. Please make sure you are using January 2023 forms (these forms have fillable boxes).
2. Type the required information into the purple boxes.
3. Upload the filled in form into DocuSign.
4. Assign the names and email addresses for the signatures, the signing order needs to be as follows:
 - a. First - Patient/caregiver/responsible party.
 - b. Second - Hospice or Palliative Care Team member.
 - c. **YOU MUST "CC" info@hpcfoundation.org (IF THIS IS NOT DONE, WE CANNOT PROCESS YOUR REQUEST).**
5. In there is a "pop up box," choose to keep PDF Data.
6. Insert the drawing boxes for signatures:
 - a. Please be sure to set up the "signature" boxes as "draw" boxes. **TYPED AND DIGITAL SIGNATURES WILL NOT BE ACCEPTED.**
 - b. Please instruct the family/patient/parent/legal guardian/responsible party that they CANNOT upload a signature or picture of their signature, we cannot accept digital signatures. They must use the "draw" function on their device to sign their name. The same process also applies to the hospice team member submitting the application.
 - c. For adult or pediatric relief applications, you can attach documents such as invoices, verification letters, W9's etc... by inserting an attachment box when setting up the DocuSign or you can send them in a separate email to 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. Press send:
 - a. The form will automatically be sent to the family/patient/parent/legal guardian/responsible party. Once they have signed, the form will be sent back to the hospice team member for their signature. After the application has been completed, the form will automatically be sent to the info@hpcfoundation.org email address. This allows us to review the application and continue the verification process.

In person signatures through DocuSign are NOT allowed! The family, patient, parent/legal guardian, 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 manually.