



DocuSign for WIOA Eligibility Procedure

Overview

DocuSign is a digital transaction platform that can assemble documents, secure data, and authenticate signatures. Through DocuSign an email can be sent to recipients requesting a review of uploaded documents and request signatures. DocuSign allows for the completion of forms by collecting a person's signature electronically to participate in the WIOA program.

Envelopes are used to deliver the document(s) to be signed. More than one document can be placed in an envelope. More than one person can be a signee in an envelope.

The Partnership purchased this service for our provider network and will be essentially charged per envelope used. The Partnership's Program Coordinators will administer the DocuSign tool. All questions regarding DocuSign should be directed to the Help Desk, specifying that you need assistance with DocuSign.

One person per agency will be provided the authority to create envelopes. AJC's may have up to three people.

Procedures

Registration Envelope (Initial Envelope)

STEP 1: The career coach determines that the applicant is both eligible and suitable for WIOA. This determination should be based on a review of the application and documentation uploaded onto Career Connect by the applicant, and after remote discussions with the applicant.

Once eligibility and suitability have been determined, you may begin the process of gathering the required signatures via a DocuSign envelope. *Note: At this point, you should have confirmed that the applicant has a working email address and that you have the correct spelling of that address.*

STEP 2: First determine what documents you will need to have signed in order to have the required signatures and supporting documentation for compliance.

Prior to creating the DocuSign envelope, all documents should be completely filled out by the Career Coach and/or Applicant, as applicable, except for signatures and dates.

The first envelope should contain all the mandatory documents listed below plus any other documents required for eligibility and compliance:

- Full WIOA Application, including signature page (Mandatory)
- Customer Code of Conduct (Mandatory)*
- Notice of Rights Acknowledgement Form (Mandatory)*
- Career Connect Client Consent (Mandatory)*
- Basic Skills Screening Tool (as needed)*

- Self-reported Income Form (as needed)*
- Self-attestation Form (as needed)*
- Any other forms specific to your agency (for example, code of conduct or agency consent)

*All of these forms have been posted as fillable forms in the WIOA Pre-Application section of the Help Desk site: <https://workforceboard.zendesk.com/hc/en-us/articles/360042420211-WIOA-Pre-Application-Procedures>

STEP 3: Your designated agency DocuSign user will create an envelope containing all the required documents. At this point your agency's DocuSign user will need to:

- Download from Career Connect and upload into the DocuSign envelope:
 - the completed WIOA application
 - any attestation or compliance forms completed and uploaded into Career Connect by the applicant
- Upload the Customer Code of Conduct and Career Connect User Consent forms.
- Upload any other forms your agency requires.

STEP 4: The career coach should directly contact the applicant and explain how the DocuSign process works. Explain that the applicant will be receiving an email to electronically complete and sign their WIOA eligibility forms. Explain from who and when the email will be sent and how to properly respond. Find out if the applicant will be using a Smart Phone, Tablet or Desk-Top computer so that the most specific guidance can be provided.

STEP 5: Agency DocuSign user sends the applicant and the career coach the envelope.

STEP 6: The applicant and career coach are required to sign and date all documents.

STEP 7: Agency receives and automated response DocuSign email from applicant and career coach each person signs the documents. Once all signatures are completed, the applicant and coach will receive an email with signed copies of each document.

STEP 8: Agency reviews all documents to ensure that they have been completed and signed and that the information is accurate. **This is the time to ensure that everything is completed and accurate. If there are items that need to be corrected, the career coach should reach out to the applicant and correct those items before moving forward.**

Once the agency has verified that all documents and signatures are accurate, upload all signed documents into the applicant's profile in Career Connect.

STEP 9: At this point, the career coach may move forward with registering the applicant into WIOA and then begin IEP/ISS development process.

DocuSign Account Set-up

Below are steps that each agency's designated DocuSign user will need to complete the first time they log into their accounts.

Step 1: Log into your DocuSign account.

DocuSign®

Please log in to your account

CONTINUE

[No account? Sign up for free](#)

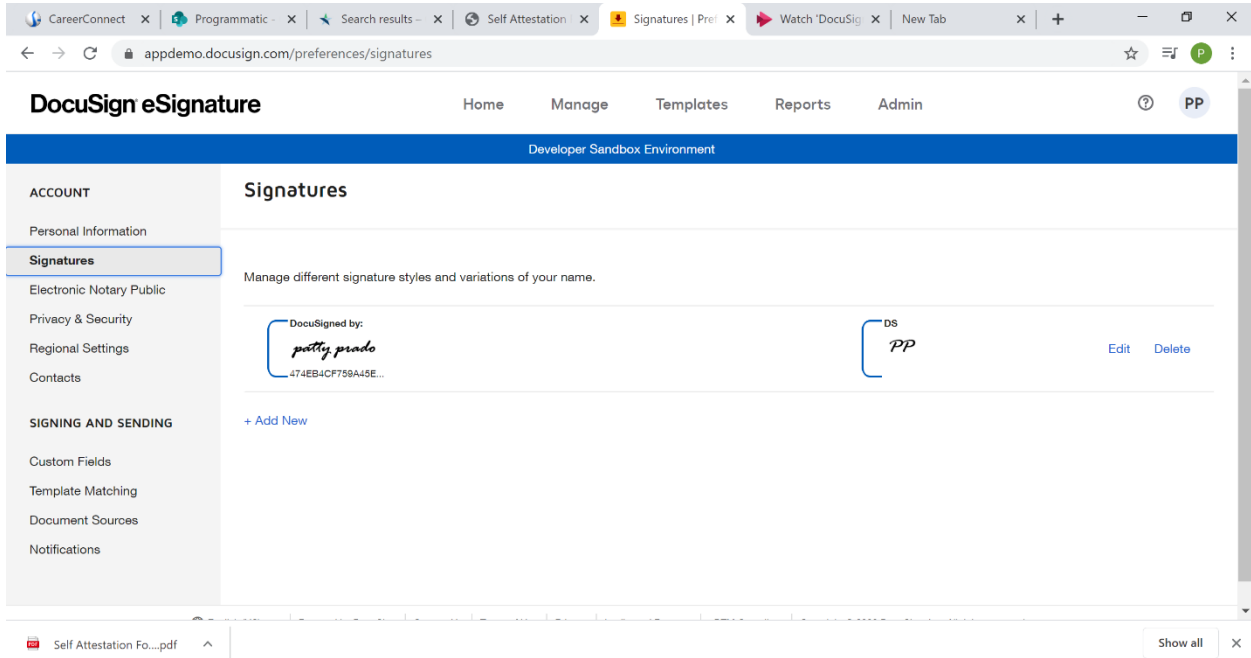
STEP 2: After you have logged in it will take you to your home page. Click on edit to complete your profile.

The screenshot shows the DocuSign eSignature home page. The browser address bar displays 'appdemo.docusign.com/home'. The navigation menu includes 'Home', 'Manage', 'Templates', 'Reports', and 'Admin'. A blue banner at the top reads 'Developer Sandbox Environment'. Below this, a large black banner contains the text 'Sign or Get Signatures' and a yellow 'NEW' button. The main content area is divided into three columns: 'OVERVIEW' (Last 6 Months) with a list of status items (Action Required, Waiting for Others, Expiring Soon, Completed); 'DEVELOPER SANDBOX' with introductory text and a 'GETTING STARTED' section; and 'MY DOCUSIGN ID' with a profile for 'patty prado' (pprado@chicookworks.org, Member since 2020) and an 'Edit' button. A signature sample is also shown.

Step 3: Select Personal Information to complete your company information.

The screenshot shows the 'Personal Information' settings page in the DocuSign eSignature Developer Sandbox Environment. The browser address bar displays 'appdemo.docusign.com/preferences/personal-information'. The navigation menu is the same as in the previous screenshot. The left sidebar lists various account settings, with 'Personal Information' selected. The main content area is titled 'Personal Information' and includes a 'To configure what information is shared when you sign, edit Privacy & Security' note. There are 'SAVE' and 'CANCEL' buttons. A blue information box states: 'You can now manage information on your new DocuSign Profile. Click the menu above and choose 'Manage Profile''. Below this, the user profile for 'patty prado' is shown with an 'Edit' button, email 'pprado@chicookworks.org', and account name 'The Partnership'. An 'UPLOAD PHOTO' button is also present. The 'Company and Job Title' section is partially visible at the bottom.

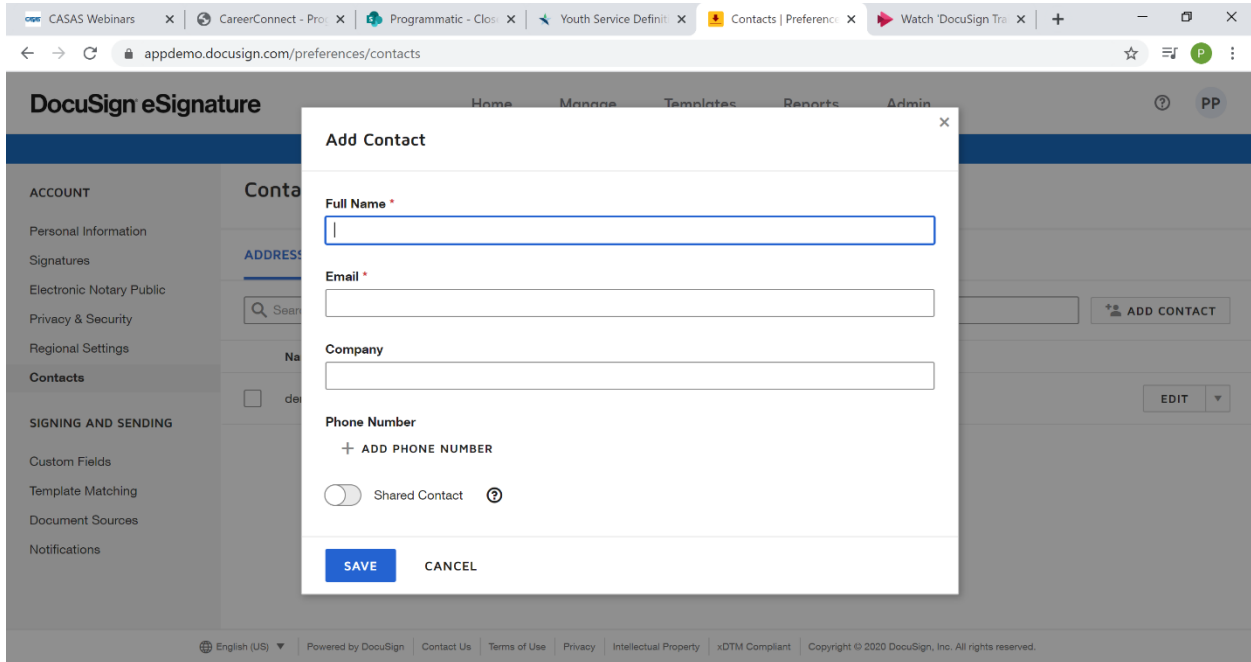
STEP 4: Select Signatures to select your signature and initials style.



Creating the Eligibility Envelope

These are the steps required to create a DocuSign envelope and route it to signees. **You should include all required documents in one envelope.**

STEP 1: Select Contacts to add recipients (applicant and career coach).



DocuSign eSignature Home Manage Templates Reports Admin

Developer Sandbox Environment

Contacts

ADDRESS BOOK DIRECTORY

Search All Contacts ADD CONTACT

	Name	Email	Company	Type	
<input type="checkbox"/>	dena alkhatib	dalkhatib@chicookworks...		Personal	EDIT
<input type="checkbox"/>	Gloria Herrera	Gherra@chicookworks....	The Partnership	Personal	EDIT

STEP 2: After adding your contacts, go back to home to begin composing the envelope. Click on- New, Send an Envelope.

DocuSign eSignature Home Manage Templates Reports Admin

Developer Sandbox Environment

Sign or Get Signatures NEW

- Send an Envelope
- Sign a Document
- Use a Template
- Create a PowerForm
- Create a Clickwrap

OVERVIEW Last 6 Months

- Action Required -- >
- Waiting for Others -- >
- Expiring Soon -- >
- Completed -- >

DEVELOPER SANDBOX

This is your sandbox (demo) environment, v... enables you to configure your apps for API integration, including integrator keys and associated parameters.

This sandbox is a full-featured development environment, however all the documents sent for eSignature through this account are flagged with a red demo watermark and are thereby not legally-binding.

GETTING STARTED

All guidance about using your sandbox demo account, coding your integrations, and migrating to

CUSIGN ID Edit

patty prado
pprado@chicookworks.org
Member since 2020

DocuSigned by:
patty prado
474EB4CF759A45E...

STEP 3: Upload all the forms that you want to include in the envelope. The envelope can have multiple forms. In this example, the WIOA application, CC User Registration (consent) form, Customer Code of Conduct, and Notice of Rights forms have been included. Click on upload and select the document/forms to include in the envelope.

Upload a Document and Add Envelope Recipients

Add Documents to the Envelope

UPLOAD

USE A TEMPLATE

GET FROM CLOUD

Add Recipients to the Envelope

As the sender, you automatically receive a copy of the completed envelope.

ADD FROM CONTACTS SIGNING ORDER

Import a bulk list. Send copies of this envelope to many people at once.

SEND NOW NEXT

New folder

File Home Share View

Documents > New folder

Search New folder

Name	Date modified	Type	Size
Betty White	4/26/2020 2:29 PM	PDF File	
CC CUSTOMER REGISTRATION FORM Original	4/28/2020 5:56 PM	PDF File	
Customer Code Of Conduct 2020	4/28/2020 6:01 PM	Microsoft Word Doc...	
Notice of Rights 2018	4/28/2020 5:48 PM	PDF File	

Year-to-Date Manager's Report DocuSign Procedures.docx Prepare Envelope | DocuSign CareerConnect - Review Registra

appdemo.docuSign.com/prepare/a7035615-77e1-4769-9b3b-b898430eb9fd/

Please DocuSign: Betty White.pdf, Customer Code Of Conduct 2020.docx, Notice of Rights 2018.pdf...

Add Documents to the Envelope

Betty White.pdf
2 pages

Customer Code Of Condu...
1 page

Notice of Rights 2018.pdf
1 page

Client consent form.pdf
1 page

appdemo.docuSign.com/prepare/a7035615-77e1-4769-9b3b-b898430eb9fd/

STEP 4: Select the recipients by order of receipt (the order they should sign in). In this example Dena is the Applicant and Patty is the Career Coach. After you select your recipient you can email them a message.

Please DocuSign: Basic Skills Screening Tool (1).docx, Amy Grinch.pdf, Self Attestation Form-Re...

Add Recipients to the Envelope

As the sender, you automatically receive a copy of the completed envelope.

[Import a bulk list.](#) Send copies of this envelope to many people at once.

Set signing order

1 **Name *** dena alkhatib **NEEDS TO SIGN** **MORE**

Email * dalkhatib@chicookworks.org

2 **Name *** patty prado **NEEDS TO SIGN** **MORE**

Email * pprado@chicookworks.org

SEND NOW **NEXT**

Self Attestation Fo...pdf

Chicago Cook Workforce Partner | Prepare Envelope | DocuSign

Please DocuSign: Betty White.pdf, Client consent form.pdf, Customer Code Of Conduct 2020.docx, ...

ADD RECIPIENT

Message to All Recipients

Custom email and language for each recipient

Email Subject*
Please DocuSign: Betty White.pdf, Client consent form.pdf, Customer Code Of Conduct 2020.docx, ...
Characters remaining: 2

Email Message
Dena,
Please print, sign your name and date where appropriate.
Characters remaining: 9937

Advanced Options | Edit

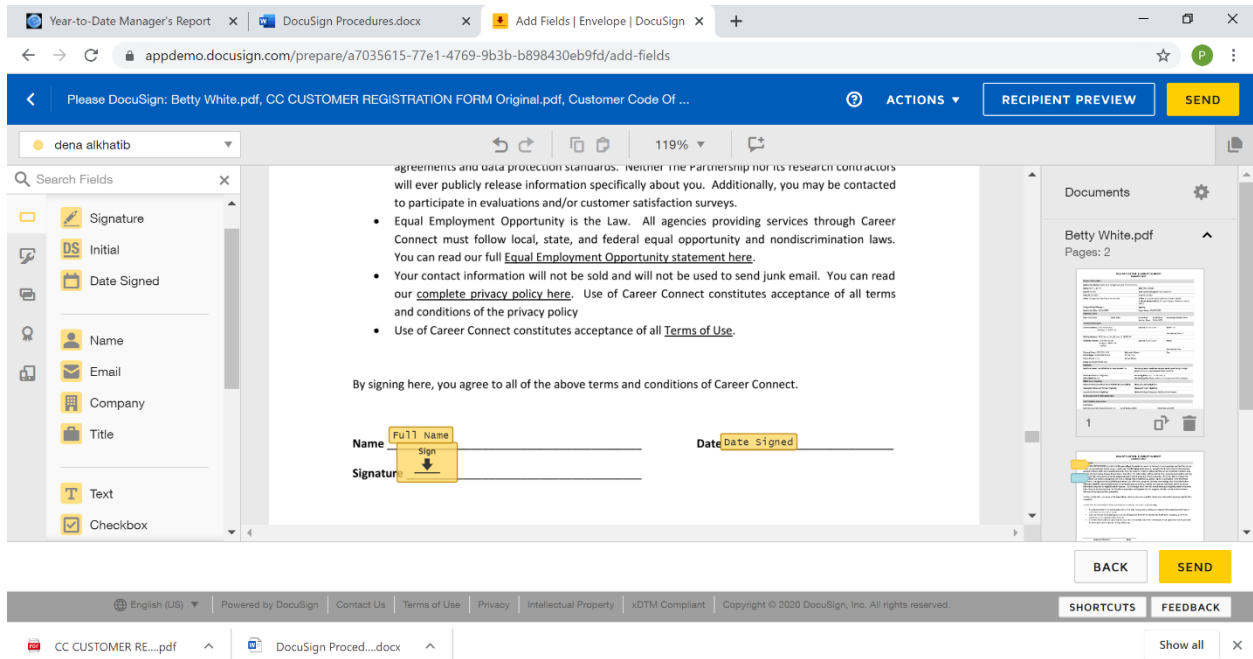
- Recipients can sign on paper
- Recipients can change signing responsibility
- Incomplete envelopes expire 120 days after send date
- Recipients are warned 0 day(s) before request expires
- Comments are enabled
- Senders can use either quick send or advanced edit

SEND NOW **NEXT**

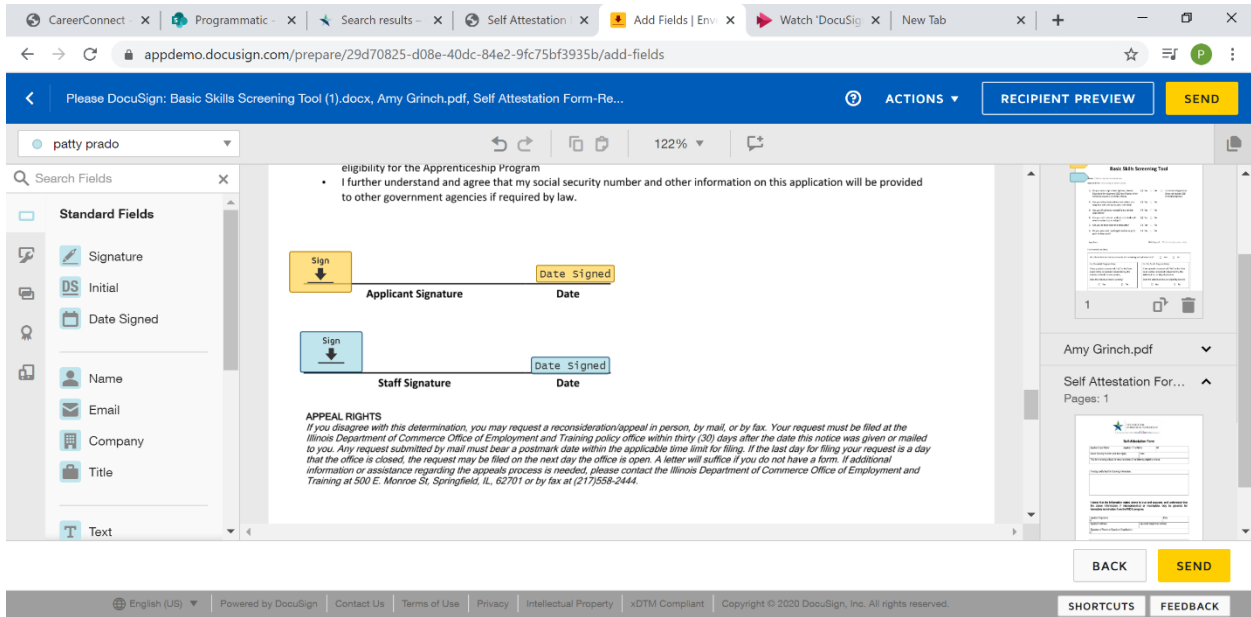
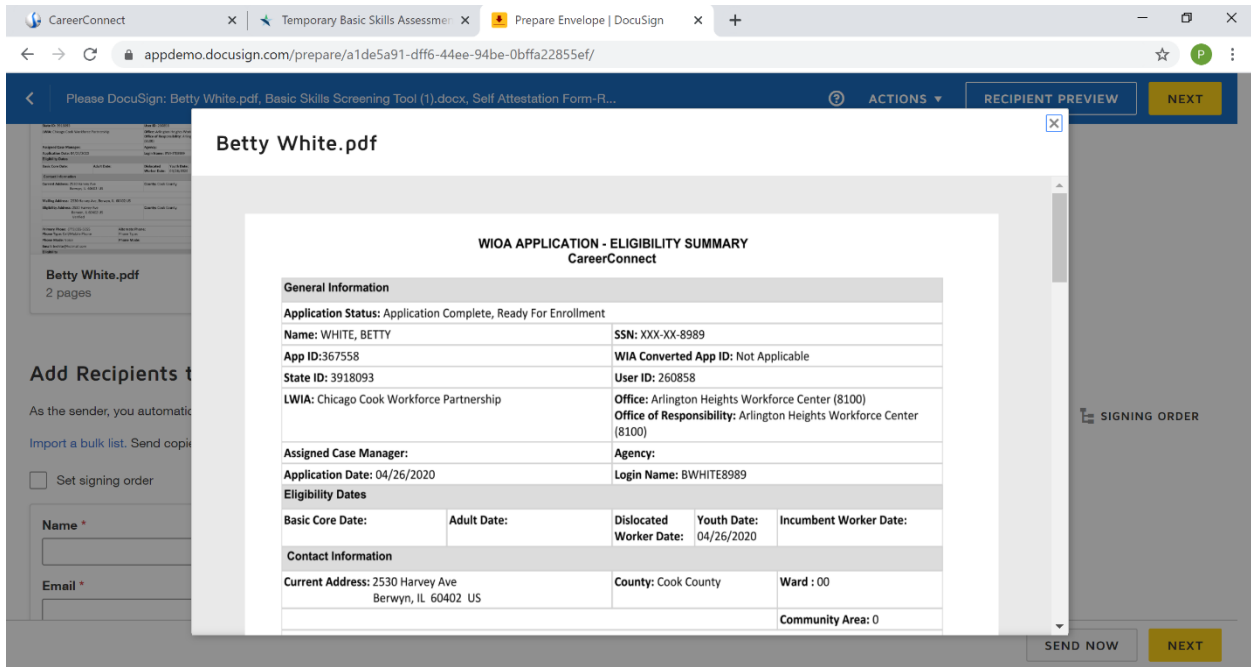
STEP 5: For each form:

- Select the first signee
- Select the appropriate fields from the menu and place them in the document where the signee should sign, date, or print name, as applicable

For example, the Client Consent Form must be signed by the Applicant. So in this example, Dena is selected as the signee, and “Full Name”, “Date Signed” and “Signature” have been added on the appropriate lines of the document.

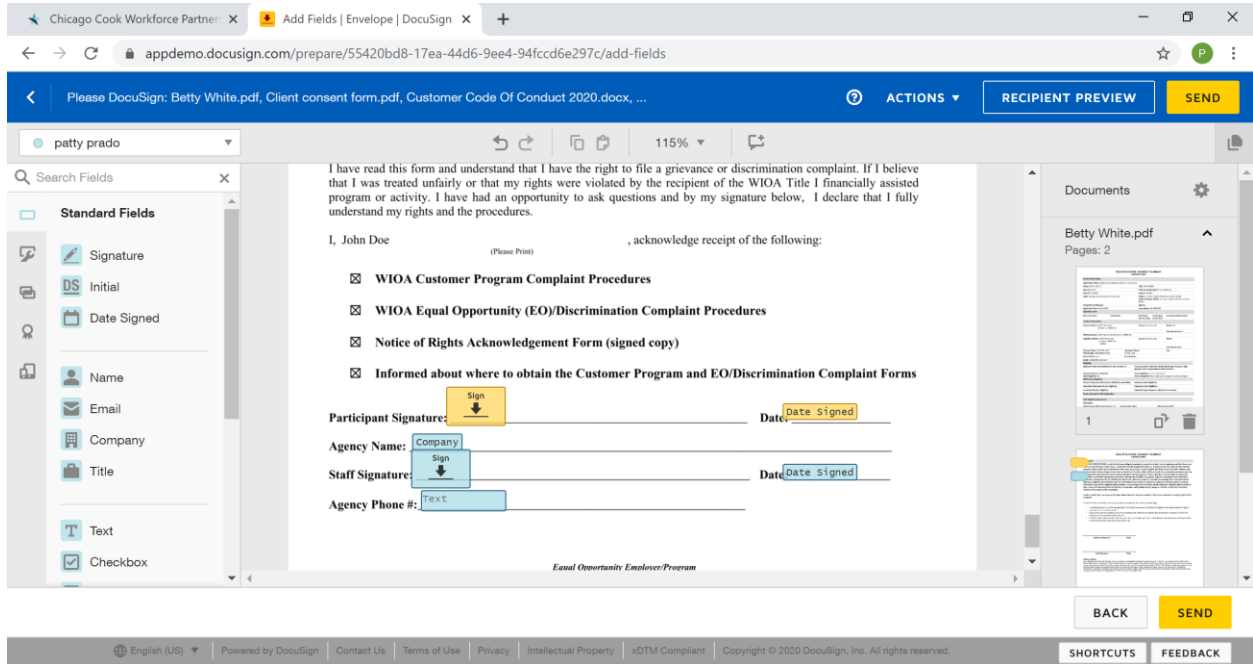


The full **WIOA Application** should be uploaded and must be signed by both the Coach and the Applicant. Note the different colors for each required signature.

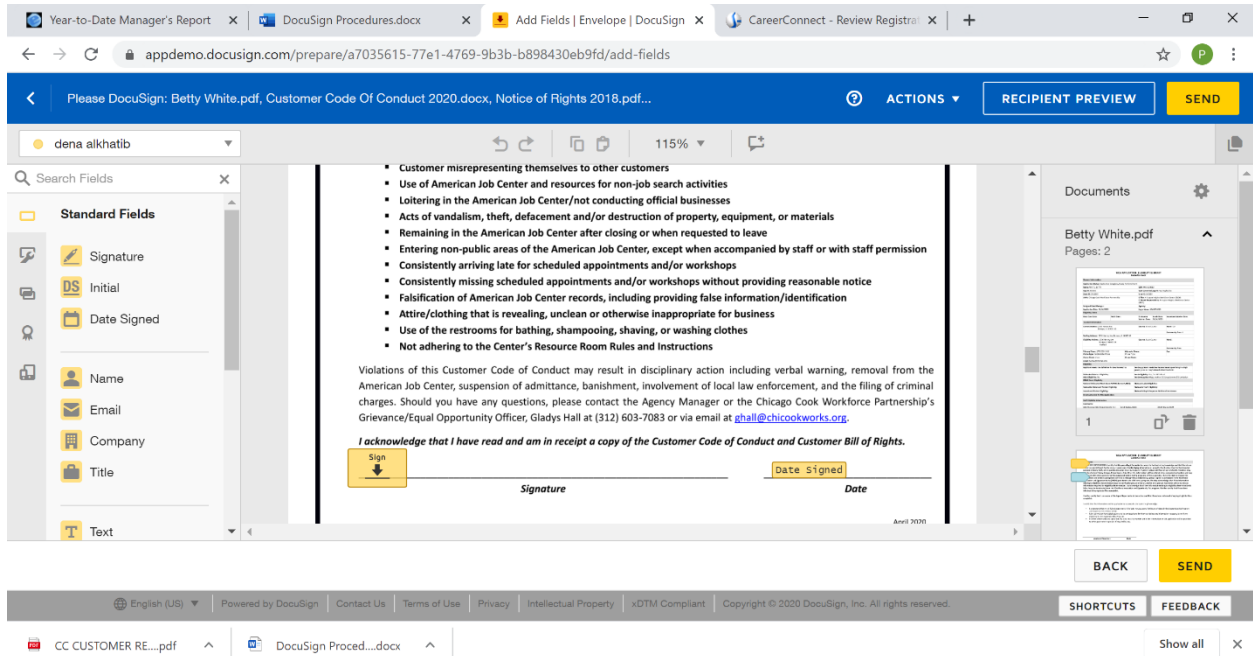


The **Notice of Rights and Acknowledgement Form** should be completed by the Applicant in advance. The career coach and applicant are required to sign and date the form.

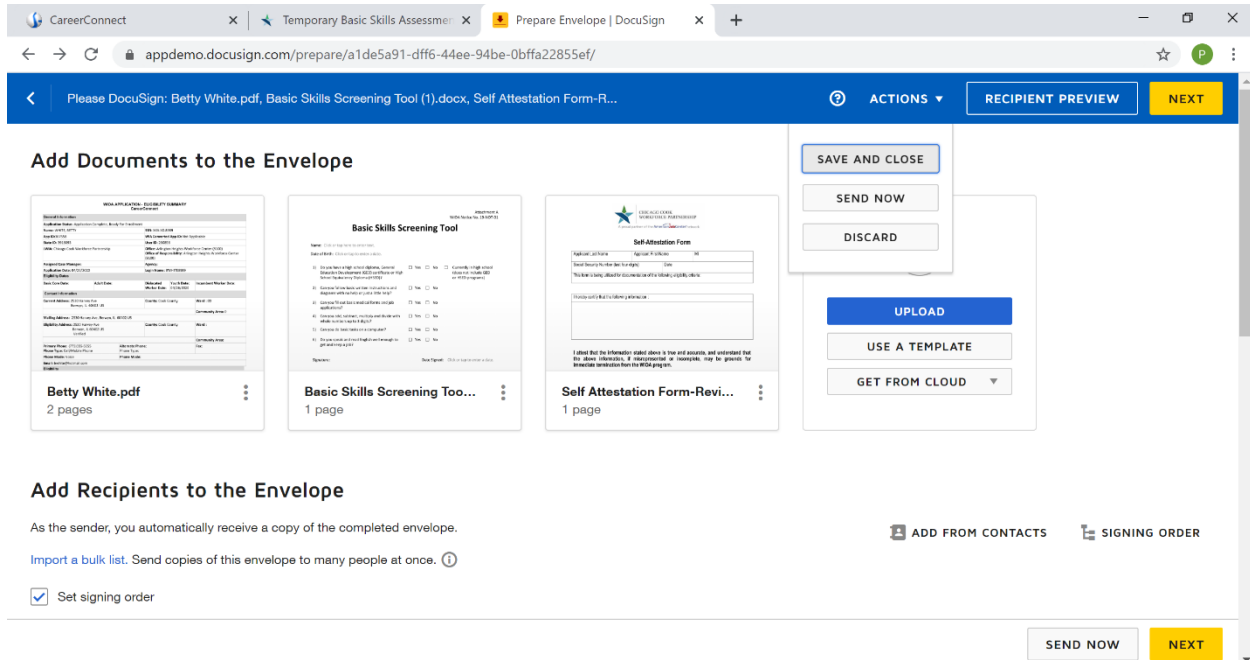
Note: The different colors for each recipient signature.



The **Code of Conduct Form** explains to the customer activities and behaviors that will not be tolerated. This form must be signed by the client.



STEP 6: To save without sending, click on actions and select save and close. This action will automatically save into a draft form. You can review the envelope and add or remove forms.



STEP 7: Once you have reviewed the envelope and confirmed that all documents are completed and ready for signature, click “Send”. DocuSign will automatically route the envelope to the signees in the order specified and will notify the agency’s designated DocuSign user when the envelop has been signed by each signee.

STEP 8: Once all signatures are completed, upload the fully executed documents into the Participants Career Connect profile.

IEP/ISS (2nd Envelope)

The IEP/ISS is a list of the objectives that need to be completed for the participant to achieve the stated goal. After developing the employment goal (and/or educational goals for youth) and all the associated objectives, **the IEP/ISS document must be signed by both the participant and career coach.**

STEP 1: Ensure that the participant and career coach are in agreement as to the goal(s) and objectives and review dates of the IEP/ISS.

STEP 2: Have your agency’s DocuSign user download from Career Connect the completed IEP/ISS and place into an envelope. This envelope will be sent to both the participant and career coach for signature.

STEP 3: Once the IEP/ISS has been signed by both the participant and career coach and returned. Upload the executed version into Career Connect.

Additional Forms

Remember all services should be related to an objective that directly relates to IEP/ISS goal. Below are additional forms that will may require a client signature and should be bundled into as few envelopes as possible.

- **Receipt of Support Services (Bus Passes/Gas Cards)**
- **ITA Financial Statement**
- **ITA Letter of Credit/(Voucher (participant only))**
- **Time Sheets**
- **OJT Documents**
- **WEX Documents**