

Questions and Answers from 4/30 DocuSign Training

1	Question	Answer	Answer
1	Approximately, how long does it take do this entire process using DocuSign?	Answer	Once the documents are uploaded, the process to create the envelope and send it is 10-15 minutes. The participant can sign the document the moment they receive it from you. You will receive the signed the document the second the participant and coach sign and finish.
2	Are ISS forms on Zendesk too? Do we need to do this for every objective update?	Answer	The ISS/IEP used is the one you complete in Career Connect. You will upload the completed ISS/IEP into DocuSign from Career Connect. When updating the ISS/IEP you follow the same process.
3	Are signatures protected so only the correct person can issue their signature?	Answer	Yes, unless the participant shares his or her email address.
4	Are we able to just use the signature and the case manager enter the date that needs to be sign? Our agency works with youth and I can already see issues with having the applicant sign on the date once they are in the system.	Answer	No, the participant needs to sign and date their own signature.
5	Are we required to let you know who will be assigned to have the DocuSign account?	Answer	Yes you must let The Partnership know who will be the DocuSign user(s) for your agency. We also need that person's email address.
6	Are you going to show how to upload documents into Career Connect.	Answer	Please see the WIOA Pre-Application and Document Upload procedures on the Help Desk website.
7	Can one envelope be sent to two different people at the same time?	Answer	More than one person may receive an envelope if multiple signatures are required on a document. NEVER send any documents to more than one participant.
8	Can the Career Planner be responsible to an send envelope?	Answer	That is up to your agency. You can determine who is your DocuSign user.
9	Can we send the IEP/ISS in the same envelope as the WIOA Application in order to save an envelope?	Answer	You should register a participant prior to initiating IEP/ISS development.
10	Can we use DocuSign for completed WIOA applications and for financial statements?	Answer	Absolutely, that is why we have it.

11	Can we use DocuSign for the applicant statement?	Answer	Do you mean the self-attestation - yes? Any documents that need to be signed for eligibility can be included.
12	Can we use DocuSign for W9 forms for our active students too?	Answer	For any documents that need to be signed remotely.
13	Can you back date a form in DocuSign?	Answer	You should never back date a document. DocuSign automatically sets the date to the date the person is signing.
14	Can you change who the envelope shows as being "from"?	Answer	No. That is why you should alert the applicant that the email is coming and who it is coming from.
15	Can you create a template of where the boxes fall since the documents won't change just who signs	Answer	Yes, a template can be created for envelopes that are similar but be careful to check position of all boxes and that recipients are correct before sending.
16	Can you create application templates that already have the agency info prefilled?	Answer	The application is in Career Connect. It is not a separate form.
17	Can you create or add additional forms such as VOE?	Answer	Yes documents can be added as necessary. Please contact the Career Connect Help Desk for additional assistance.
18	Can you make the Authorization of Release from a fillable form to be able to send to the client?	Answer	All of the required forms have been made fillable and posted on the Help Desk website with the WIOA Pre-Application materials.
19	Would there be the steps for the agencies to follow? 1. customers do the Pre-App 2. the agency checks the documents. 3. then the agency completes the WIOA Application. 4. Then they send the first "envelope" with the WIOA App signature and other eligibility documents that need signatures. 5. Once the customer signs and returns, then the agency can enter the first service	Answer	Yes this looks fairly accurate. The procedure on the Help Desk has step-by-step instructions, including screen shots, for account set up, creating an envelope, and routing the envelope for signature.
20	Do all recipients of forms have to be listed in Career Connect?	Answer	You don't have to add everyone to the Contacts. You can just type a recipients name and email address in when setting up an envelope.
21	Do any of the other forms have content updates or were they just made fillable?	Answer	Some of the forms were updated slightly. All the forms have update dates on them.
22	Do we have to use DocuSign if our agency has another e-signature platform such as Easy-sign?	Answer	You may use other signature collection apps, but it must be approved by The Partnership.
23	Do you put the case manager signature icon on the application when you send it to the client? Or do you add the staff signature icon once you get the document back from customer	Answer	Yes, just as demonstrated, you would put both the Applicant and the Coach's signature fields in the document and route the envelope to both people to sign.

24	Does DocuSign keep copies of signed documents to be accessed later/again?	Answer	Yes. but signed copies should be downloaded and maintained since this account will not maintained after Stay at Home orders are rescinded. We recommend uploading the signed documents into Career Connect to complete the "virtual" file.
25	Does the email message need to be in English, we work mostly with non-English or limited English speakers and we communicate with them in their native language?	Answer	Your personalized message may be in whatever language best helps with communication.
26	The Youth are a little different than Adults. We have them sign the ISS the same day as they are registered. What should I do?	Answer	You should not be developing an ISS with a participant who's not registered.
27	How should we advise clients who don't have the version of Adobe that allows saving filled in documents?	Answer	Signers do not need Adobe to sign.
28	How soon will DocuSign be available? I just received a voucher for a customer who supposed to start training on 5/11.	Answer	Please contact your Program Coordinator for access,
29	My agency already has a DocuSign account; can we use our own account?	Answer	Yes, please use your agency's DocuSign account and the expense can be charge to your grant
30	If a sender is no longer with your agency and their email in no longer valid is there a way for the client to forward to a different person at the agency or the program manager to know what all applications have been to respond accordingly	Answer	A Partnership staff person can transfer envelopes from one agency sender to a new sender but the Partnership should always be notified if sender is no longer at the agency.
31	if an agency already has the customer's signature can they use the partnership's DocuSign process to capture the career coach's signature ?	Answer	Yes
32	If client missed signing one of the documents sent in the envelope, would the client be able to send the document, or must all documents must be signed in order for envelope to be sent?	Answer	A client should not be able to finish an envelope without all required signatures.
33	If the customer can't sign the WIOA application on the same day it is completed, will that be a finding?	Answer	It must be signed prior to registration.
34	If the customer does not sign for whatever reason, can the app be removed?	Answer	No, but do not register the participant. The application will automatically set to "Closed, Never Enrolled" after 45 days with no Participation.

35	If the participant is willing to travel to our office, can we do our usual enrollment process and gather signatures in person?	Answer	Provided everyone practices social distancing. BE SAFE!
36	If the stay at home order is removed and our agency opens, can I conduct the intake/registration at our office maintaining social distance?	Answer	Yes.
37	If the Applicant still has the DocuSign email after a week, can they still open and sign?	Answer	Yes, the documents remain open and valid for 120 days unless you delete them or cancel the envelope.
38	I'm a little confused...If you only have 1 or 2 accounts per agency but you have additional Career Coaches who's signature will actually go on the documents of the application?	Answer	You agency's assigned DocuSign user(s) will be responsible for creating the envelopes and routing them to the Applicant and Coach for signature.
39	Is it possible for The Partnership to bundle the forms that typically belong together for signature? This would save time on this end and possible money since each envelope would contain documents that belong together.	Answer	We are expecting you to bundle the forms, as different situations call for different documents.
40	Is it recommended that all contacts be added in the contact area? Will they be chosen when sending an envelope?	Answer	The use of contacts and the directory are for convenience and not required but suggested.
41	Is the agency charged for expired envelopes sent?	Answer	Once the envelope is sent out we get charged. The Partnership is charged for each envelope.
42	is there a limit of how many docs can be included in the envelope?	Answer	There is a 25 MB maximum file size limit and a 2000 page per document limit.
43	Is this for a customer who is looking for training and or employment?	Answer	For any participant being registered and requiring signed documents.
44	it is unclear how a participant will fill out a form prior to being signed.	Answer	Forms that need to be completed by the client should be emailed. The client can upload the completed form into Career Connect via Document Upload.
45	Only one client per envelope?	Answer	Yes, one client per envelope, because you don't want client's to see each other's documents.
46	Refresh my memory. At what point does customer choose signature?	Answer	They choose a signature when they first receive an envelope. If a client already has used DocuSign they should have already chosen a signature.

47	Right, but when it comes to the actual WIOA Application in Career Connect (that both the coach and the client sign). Does that need to be signed by the client on the same day it was created?	Answer	No. The participant must sign prior to registration.
48	Should we continue to upload internal documents, if we have access to the forms?	Answer	Whichever method you prefer.
49	Should each career coach be added to the contact screen?	Answer	The use of contacts and the directory are for convenience and not required but suggested.
50	Should we have 1 envelope per application or can we bulk multiple completed applications into 1 envelope?	Answer	Only one application per envelope.
51	So agencies can invoice Partnership for DocuSign costs?	Answer	DocuSign is an allowable cost. However, keep in mind you can only charge for those cost associated with WIOA. When charging DocuSign to WIOA you would need to break down the usage to a per envelope cost. It's recommended that you consult The Partnership's fiscal unit on how to invoice for DocuSign cost.
52	So we get all of the documents signed, and then complete the enrollment on Career Connect, and then send the ISS to be signed the same day through DocuSign?	Answer	You don't have to have the ISS signed on the first day.
53	So, we will not be responsible for creating the documents, and setting up all the fields? The Partnership will do that and bundle the documents together on Career Connect so they can be downloaded?	Answer	The Partnership has provided all its required forms as fillable forms. However you must upload the necessary forms for each client and set up the signature and date fields.
54	Some training providers are having clients sign attendance sheets through Adobe (which gives a date stamped signature). Will that work for that?	Answer	That is fine for attendance sheets.
55	What about support service documents?	Answer	You will use DocuSign for support service documents that require signatures.
56	What if customer doesn't sign all documents. Can we resend the document they forget to sign?	Answer	Yes. Any documents not completed correctly must be received prior to registration.
57	What if the application or other eligibility documents are signed the day after we register? Will different dates matter?	Answer	This could lead to disallowed costs. Never register someone without receiving all required eligibility documents, including a signed application.

58	What if they don't have access to a computer or tablet?	Answer	Contact your Regional Director for assistance in this situation.
59	What is a shared envelope?	Answer	Shared envelopes can be have team members (other than the sender) send reminders but we are not implementing shared envelopes.
60	What part of the enrollment is the WIOA application completed?	Answer	The application must completed and signed by participant and career coach prior to registration.
61	What will happen if the customer does not sign and date the forms the day of application?	Answer	The important thing is that the participant and signs the application on or before the date of participant (registration).
62	When all the forms come back signed, does the Career Planner have access to the documents or do we have to wait to receive the signed documents from the assigned DocuSign user?	Answer	The fully executed documents are automatically emailed to the DocuSign User and all signatories (e.g. Applicant and Coach) once everyone has signed.
63	When you speak of registration, do you mean "enrollment into WIOA"?	Answer	Yes
64	What if you register them, and send them the application to sign and date and they don't sign it that day?	Answer	You should NOT register a client (create the Participation and add the 1st service) until AFTER you receive the signed and dated application and eligibility documents. The Application date must be on or before the date of 1st service. This is no different than when doing the application in person.
65	Will customers be able to access DocuSign with government phone (i.e. not a smart phone)?	Answer	If the "government phone" can access the internet and email then they should be able to DocuSign an envelope.
66	Will the agency have to prefill out the form for the client or are they PDF filler?	Answer	All of the required forms have been made fillable and posted on the Help Desk website with the WIOA Pre-Application materials.
67	Will the client also have to create a signature?	Answer	Yes, the client will create a signature when he/she gets the email and is asked to sign.
68	Will we receive agency accounts or individual accounts?	Answer	You will need to designate one or two staff to be the DocuSign staff users for your agency.
69	With OJT, if the HR person leaves, can we set up a different signature on ISTEP, Master, Pre-Award checklist? Or does resending it count as an additional envelope?	Answer	Once a signature has been received on a specific document it does not need to be received on that document again.