



# DocuSign Instructions

## Updated Policies and Procedures Agreements

AUGUST 2023

# How Do We Sign?

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1. Via the **DocuSign link** that was sent to CHO HMIS Administrators (or HMIS primary contacts) on Monday, 8/21.
2. By completing the **PDF forms** however is easiest for your organization (Adobe, print/sign/scan, etc.) and returning to [DSSHMIS@dss.nyc.gov](mailto:DSSHMIS@dss.nyc.gov)

# DocuSign

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1. One individual (the CHO HMIS Administrator) should open the link and enter the **name** and **email address** for individuals in each role.
  - The only optional role is the 2<sup>nd</sup> End User. If one individual has multiple roles, please list their name and email twice.

# DocuSign



ocusign.net/d63545d1-7c8d-41e0-a3e9-56e074f2bce9?env=na4&acct=c62dcdd5-fac6-4119-bca4-eb92f0d9358... A

## CHO HMIS Administrator

Your Name: \*

Caroline Prichard

Your Email: \*

prichardcar@dss.nyc.gov

Please provide information for any other signers needed for this document.

## CHO Executing Officer

Name:

Leah Robinson

Email:

robinsonlea@dss.nyc.gov

## CHO End User #1

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2. Click “**begin signing**” and you will be routed through all fields required of the CHO HMIS Administrator. Then select “Finished signing” and the form will be sent to the individual in the next role to complete their designated fields.



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## Participating Organization Agreement ***Participating Organization Agreement***

THIS HOMELESS MANAGEMENT INFORMATION SYSTEM PARTICIPATING ORGANIZATION AGREEMENT (the "Organization Agreement" or "Agreement") is made by and between the New York City Department of Social Services, as the primary entity for the New York City Continuum of Care Homeless Management Information System (hereinafter "DSS"), and The HMIS Team, a nonprofit corporation or organization, or contributing HMIS organization located at 4 World Trade, New York NY (hereinafter "CHO").

*Whereas*, the NYC HMIS is a data warehouse that operates in accordance with the U.S. Department of Housing and Urban Development (HUD) standards; and

NEXT

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3. CHO HMIS ADMINS: For the 2<sup>nd</sup> End User form, if you do not have a 2<sup>nd</sup> End User, select “**We do not have a 2<sup>nd</sup> End User.**” For organizations with only 1 NYC Data Warehouse End User, no signature is required on this page.

## Org with 2 End Users:

Person requesting NYC HMIS Data Warehouse access

DocuSigned by:

*Caroline N Prichard*

CHO HMIS System Administrator or Executing Officer

I have signed. ▼

to be completed by DSS:

NYC HMIS Data Warehouse System Administrator or Designee

Department of  
Social Services

## No 2<sup>nd</sup> End User:

Person requesting NYC HMIS Data Warehouse access

Sign



CHO HMIS System Administrator or Executing Officer

We do not have a 2nd End User. ▼

to be completed by DSS:

NYC HMIS Data Warehouse System Administrator or Designee

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4. As individuals complete the fields designated for their role, it goes to the next person on the list. People in multiple roles will receive an email from DocuSign inviting them to sign multiple times. You will only be able to fill in the fields designated for your role.

- If the next person on your list hasn't received an email, let us know and we can re-send the form to them.



# DocuSign

## Recipients

1

COMPLETED



**Caroline N Prichard**

prichardcar@dss.nyc.gov



**Signed**

on 8/24/2023 | 04:02:56 pm

Signed in location

1

CURRENT

2

**Leah Robinson**

robinsonlea@dss.nyc.gov



**Needs to Sign**

Sent on 8/24/2023 | 04:02:58 pm

WAITING

3

**Caroline N Prichard**

prichardcar@dss.nyc.gov



**Needs to Sign**

4

**Caroline N Prichard**

prichardcar@dss.nyc.gov



**Needs to Sign**

Caroline (the CHO HMIS Admin) has signed, and it has now been emailed to CHO Executing Officer Leah

# DocuSign

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Signers will receive an automatic email when it is their turn to sign— it might be a good idea to let these individuals know that they should be expecting an email from DocuSign.

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[EXTERNAL] Complete with DocuSign: CHO Participation Agreements



DocuSign NA4 System <dse\_NA4@docusign.net>

To ○ DSSHMIS

# DocuSign

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5. Jayme, representing HMIS/DSS, will be the last person to sign all agreements. **Once everyone has signed, all signers will receive the final, complete document.**

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At this point, we have your organizations agreements and nothing else is needed. If you have a new End User or need to update your organization agreements, you can do so at any time. However, there is no annual requirement.

# DocuSign

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**As an alternative to DocuSign**, agreements can also be completed in PDF form and returned to us at [DSSHMIS@dss.nyc.gov](mailto:DSSHMIS@dss.nyc.gov).

# Thank you!

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**Questions? Concerns? DocuSign Issues? Need forms re-sent?**

[DSSHMIS@dss.nyc.gov](mailto:DSSHMIS@dss.nyc.gov)

**Join our NYC HMIS Transition office hours, Fridays  
3pm – 4pm!**

[Data Warehouse Transition - CCOC \(nyc.gov\)](http://nyc.gov)