

Wish Clearance Process (DocuSign)

Updated 7/14/2020

Overview

Purpose: Process Wish Clearance forms for the Wish via DocuSign

We are required to keep all medical forms current within 6 months for any wish that involves certain national types and 1 month for a cruises and international Wishes. Our policy is to have the Wish Clearance and a Child Medical Summary signed and returned within 30 days of the initial request in the Meds b process.

Wishes that do not need a sign Wish Clearance forms are:

- Shopping spree, Electronic, Playhouse, Education, Musical equipment, Parties, Room Make over, Camper

Wishes that require a Wish Clearance form and a Child Medical Summary form signed are:

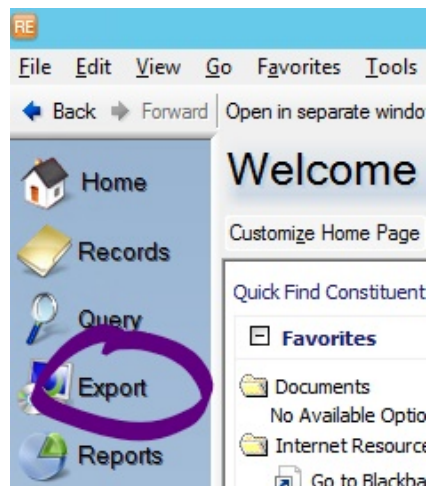
- All Cruises, International travel, Domestic Travel, Animals, Pools and Spas, Involvement in Physical Activities, Motor Vehicles, Water crafts

Vocabulary in this document:

- Wish Clearance form- this form must be signed and dated by a Doctor, Nurse Practitioner, Physician Assistance for certain national type of wishes to be considered as a wish for a child. It also includes the Medical Summary.
- RE: Raisers Edge

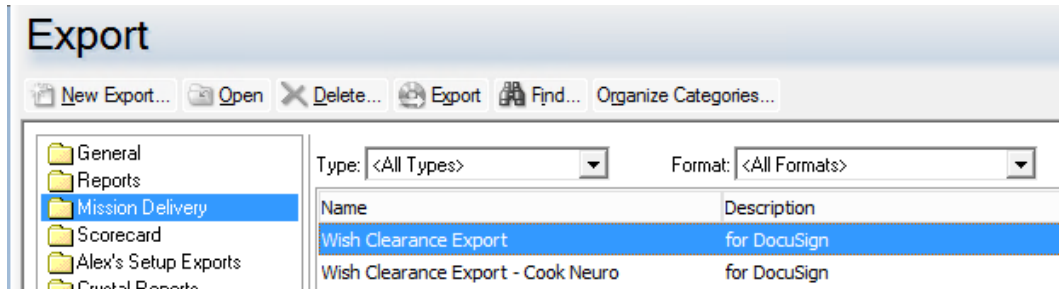
Initial Wish Clearance and a Child Medical Summary process

Step 1. The forms are created in DocuSign out of an existing template. The forms will be sent in bulk to either the email of the medical professional who referred, social worker, physician's office or the person who is listed as the best medical contact. These relationships are listed within the child's record. The field that populate the template must be exported from RE.

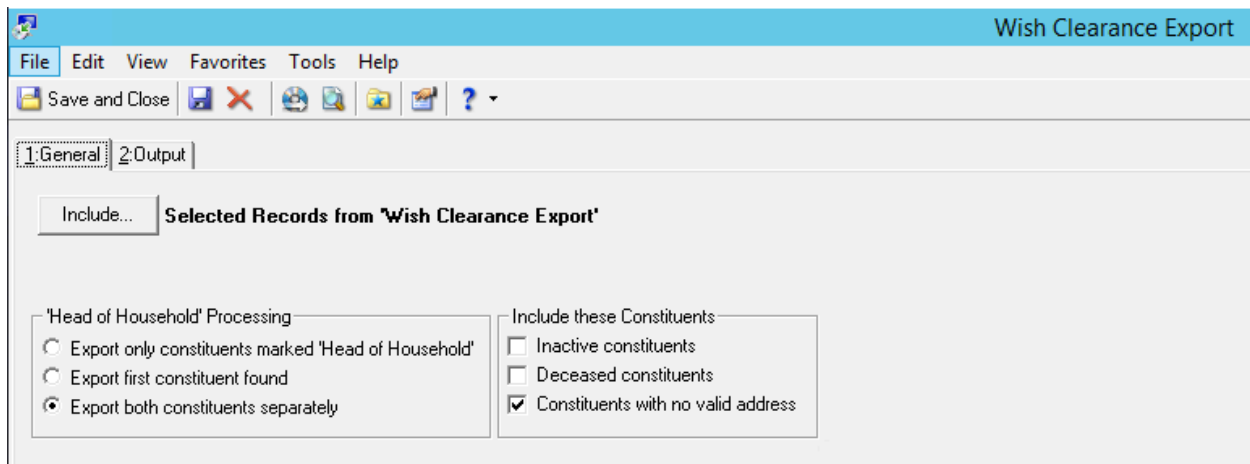


Step 2. Next, go to the Mission Delivery Folder. Open “Wish Clearance Export.”

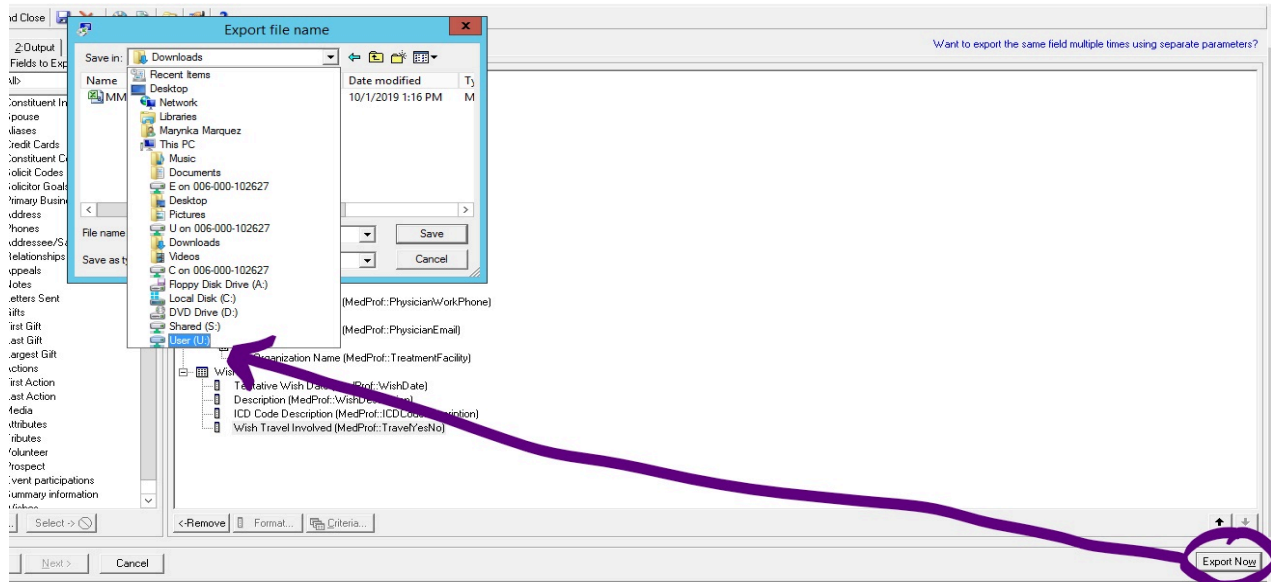
(Note that there is a copy of this export just for Cook Children’s Neurology Department. This is because they require all Wish Clearances to be sent to a specific email that is not the email of any specific medical professional relationship. You will repeat this same process for Cook Children’s Neurology.)



Step 3. Once open, make sure the query named “Wish Clearance Export” is selected and the options match the ones selected below. Click the second tab, Output.

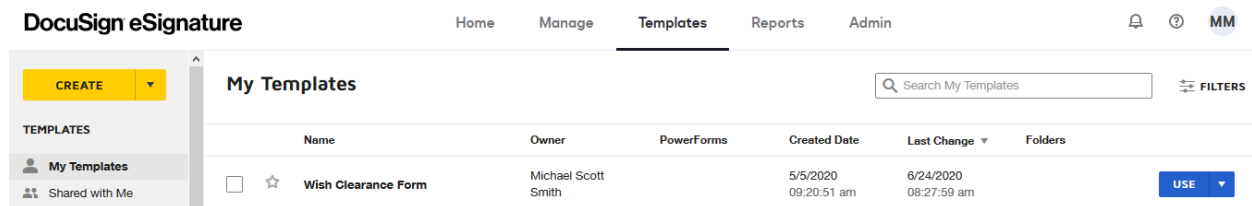


Step 4. All fields have already been set up. Click “Export Now” on the bottom right-hand corner. You will be asked to save a CSV file. Name it as “docusign wish clearance_month.day.year”. Use the drop-down menu to save it in the folder designated for Wish Clearance exports, which can be found at:
S:\Mission Delivery\Medical Intake\DocuSign Wish Clearance Exports



Complete the same process for the export created specifically for Cook Children's Neurology Department. Open the files to make sure all fields are populated. If required information is missing, you must identify the issue within the individual records before proceeding.

Step 5. Log into DocuSign at <https://account.docusign.com/#/username> using medical@ntx.wish.org as the username and **16803Addison** as the password. Go to "Templates". Find the Wish Clearance Form and click Use in the blue box on the right.



Step 6. Here you see a preview of the Wish Clearance template and DocuSign will ask you to add individual recipients manually, but this is a bulk import. Click "Edit" on the bottom left hand corner.



Add Recipients

Recipients

MedProf

NEEDS TO SIGN

MORE ▾

Name *

Email *

ADD RECIPIENT

Message to recipients ▾

SEND

EDIT

Step 7. The documents that must be sent in the envelope are the Wish Clearance form and the Quick Reference Guide, and are already uploaded. Click “Next” on the bottom left hand corner.

Please DocuSign: Wish Cl...

Add

Select

Prepare

Review

Add Documents

pdf

Wish Clearance DocuSign Quick Reference Guide.pdf

1 page

1 Template Applied

pdf

Wish Clearance form.pdf

4 pages

Drop your files here or

UPLOAD

▾

☐

I'm the only signer

NEXT

Step 8. Click “Import bulk list.”

gn: Wish C...

✓ Add — ● Select ... ○ Prepare ... ○ Review

Add Recipients

SENDER
Medical Intake Team Make-A-Wish North Texas

RECIPIENTS
✓ Set signing order | [View](#)

MedProf NEEDS TO SIGN MORE

Name *

[Import bulk list](#)

Step 9. Find the CSV file you exported from Raiser's Edge and click Open.

| | | | |
|-----------------------|--------------------|----------------------|------|
| docusign test | 5/13/2020 11:46 AM | Microsoft Excel C... | 1 KB |
| Sample-Bulk-Recipient | 5/7/2020 8:52 AM | Microsoft Excel C... | 4 KB |

me: docusign test_06.30.2020

*.CSV

[Open](#) [Cancel](#)

Step 10. You will see a long list of exceptions. These are the fields that were not populated by the Raiser's Edge import, because they will be filled out by the signer. Click "Accept".

Bulk Send Matching Exceptions

The following items could not be matched between entries on your envelope and the imported bulk list. You can accept these matching exceptions and continue with the envelope. Or you can discard the imported CSV, edit it to update column headers as required, and then re-import the edited file.

You can download a sample bulk list preformatted for your envelope.
[Download sample](#)

Envelope entries:

- MedProf::PhysicianEmPhone
- MedProf::HealthSummary
- MedProf::CurrentMeds
- MedProf::Allergies
- MedProf::Travel_NoComments
- MedProf::WishNotApproExplain
- MedProf::NeedsSpecify1

[ACCEPT](#) [DISCARD CSV](#)



Step 11. Double-check to make sure all fields are populated. If important information is missing (such as the best medical contact's email or the doctor's name), you must cancel the import in DocuSign and identify the issue within the individual records. Once resolved, complete steps 1-4 again and replace the original CSV file you created.

If all fields are populated, click "Finish Import".

prof_UserName]] Please DocuSign: Wish C... Add Select Prepare Review

Bulk List Preview

ALL RECIPIENTS (22) ERRORS (0)

| MedProf::Name | MedProf::Email | MedProf::PhysicianTitle | MedProf::PhysicianName | MedProf::PhysicianWork |
|-------------------|----------------------|-------------------------|------------------------|------------------------|
| Jennifer Maness | jennifer.maness ... | Dr. | Martha Pacheco | (214) 456-2382 |
| Patricia Quinn | patricia.quinn2@ ... | | | |
| Paige Mauch | paige.mauch2@ ... | Dr. | Susan Hsieh | (682) 885-7960 |
| Terri Castellanos | mcastellanos@el ... | | | |
| Kathryn Pylant | kathryn.pylant@ ... | Dr. | Chibuzo O'Suoji | (806) 725-4840 |
| Janette Cassano | janette.cassano ... | | | |

FINISH IMPORT CANCEL



Step 12. You will be taken to the Wish Clearance form. You do not need to make any changes, so click “Next” on the bottom right-hand corner.

Step 13. The message to recipients has already been written and saved within the template. Remove the unnecessary word “Morning” or “Afternoon” in the greeting. Click “Send”.

Step 14. It takes a couple of minutes for the sent envelopes to appear under the Sent folder under “Manage”, so don’t immediately assume something went wrong and attempt the process again.

DocuSign eSignature Home Manage Templates Reports Admin

ENVELOPES

- Inbox
- Sent
- Drafts
- Deleted
- PowerForms

QUICK VIEWS

- Action Required
- Waiting for Others**
- Expiring Soon
- Completed
- Authentication Failed

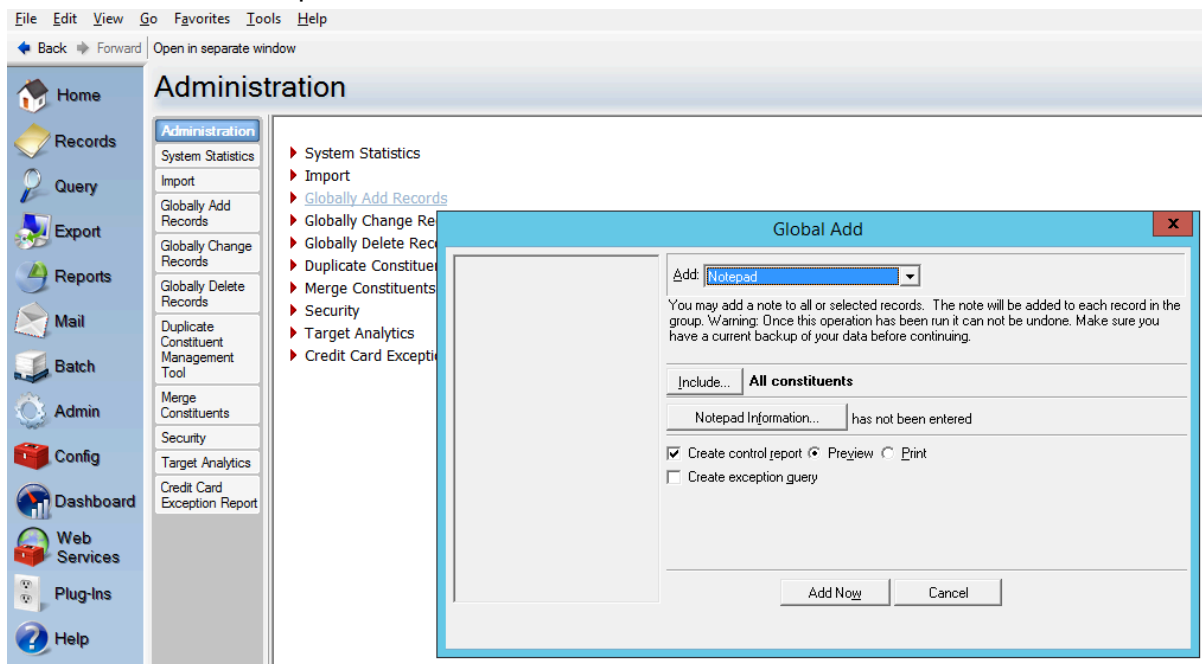
Waiting for Others

Search Quick Views FILTERS

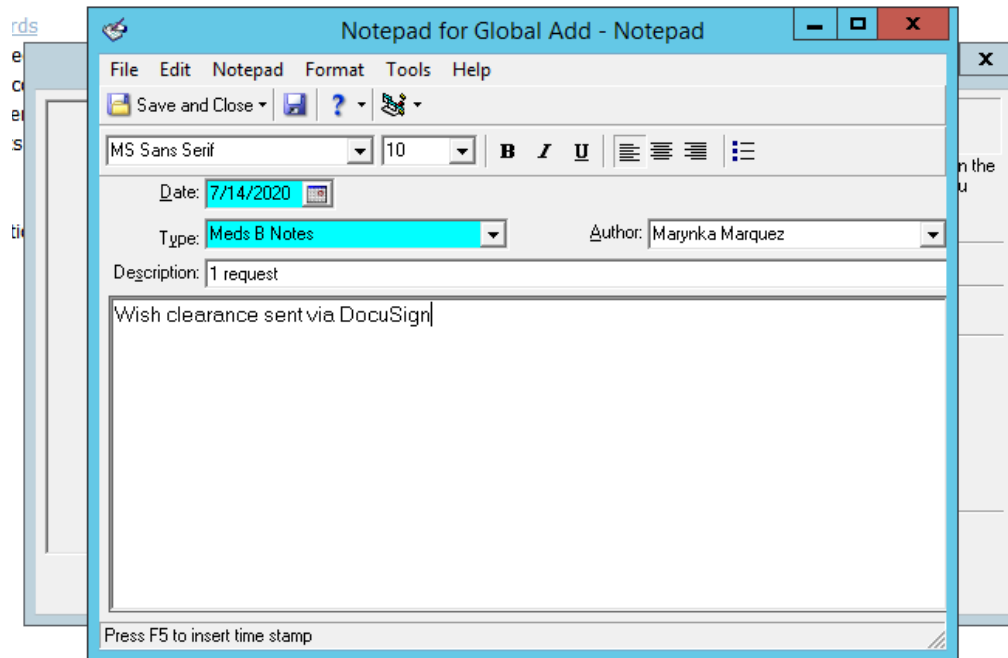
| Subject | Status | Last Change | Folder |
|--|--------------------|--------------------------|-------------|
| <input type="checkbox"/> Ricardo Guirola Please DocuSign: Wish Clearance Form To: Ricardo Guirola | Waiting for Others | 6/24/2020 02:12:19 pm | Sent RESEND |
| <input type="checkbox"/> Make-A-Wish Signature Needed - Celebrity Letter of Understanding To: Michele Erwin, Douglas Erwin +1 more | Waiting for Others | 5/27/2020 01:39:12 pm | Sent RESEND |
| <input type="checkbox"/> Make-A-Wish Signature Needed - Wish Receipt To: Jennifer Maturino, Lilly Arriaga-Walker | Waiting for Others | 5/19/2020 03:59:12 pm | Sent RESEND |

Step 15. Go to Administration in RE and click “Globally Add Records”. Select “Notepad” in the drop-down menu.

Click “Include” and select the query you just used to create the export: Wish Clearance Export. Then click “Notepad Information”.



Step 16. Fill out the Notepad information as demonstrated below, then click “Save and Close”.



Step 17. Click “Add Now”.

NOTE: If you deleted a row from the DocuSign import, you **MUST** delete the Notepad that states a DocuSign envelope was sent because it was not. If a Wish Child record has a note saying the Wish Clearance was sent when it was not, it will create confusion later.