



AMSI DIGITAL GUIDE – Digital Intake Forms and Signature Integration

First Edition – 2025

Summary:

Outlines a compliant, efficient workflow for digitizing and managing intake forms for individuals with IDD using Microsoft Forms, Power Automate, DocuSign, and CX360. Ensures accurate, secure, and legally sound handling of both signature-required and non-signature forms.

Purpose:

To guide providers, intake professionals, and system designers in implementing an automated digital intake process that protects rights, maintains compliance, and supports service quality.

Key Points:

- Master Intake Form Registry defining legal signature requirements
- Automated routing via Power Automate to secure CX360 storage
- DocuSign integration for legal consent forms
- Standardized form design and metadata tagging for efficiency
- Regular audits to maintain compliance and performance

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