DocuSign Sender Instructions

Contents

Organize your Workflow with DocuSign

With DocuSign, you can prepare, send, sign and manage your documents securely:

- Streamline the signature process – no need to print, sign, scan
- Reduce paper clutter and printing costs
- Store and send signed documents securely
- Manage signed documents in one place
- Fully automate the signing and sending of reviews to the central Box folder using a standardized file naming convention

Requestor Workflow

You can manage your DocuSign workflow in four steps:

- Prepare documentation
- Create a new envelope
- Send the envelope
- Sign the envelope

Prepare Documentation

Prepare your document as you normally would, leaving the signature and date sections blank.

DocuSign eSignature supports a broad variety of file formats with PDF and Word docs (e.g. .doc, .docx, etc.) being the most common.

DocuSign Access

Once your document is complete, you can upload it to DocuSign and receive signatures electronically.

Login to DocuSign

1. Visit https://docusign.com/login
2. Enter the **email address** and **password** for your DocuSign account
3. Click **Continue** and follow the additional prompts
4. You'll see the DocuSign eSignature homepage

Create a New Envelope

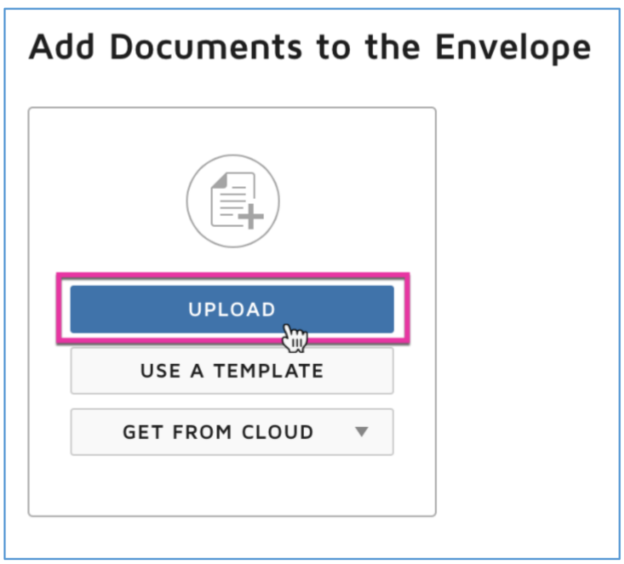
This section describes how to:

- Add documents to an envelope
- Add recipients to the envelope
- Message all recipients

Add Documents to an Envelope

1. Click on **New**
2. Select **Send an Envelope** from the drop-down menu:

3. Click on **Upload**:



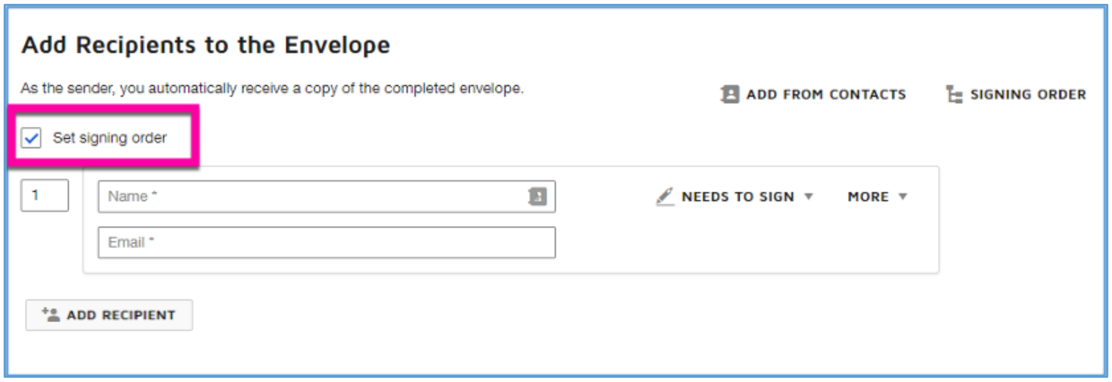
4. Browse and locate the document, then select **Open** from your desktop file browser window
5. Your document is uploaded and displays to the left

Add Recipients to the Envelope

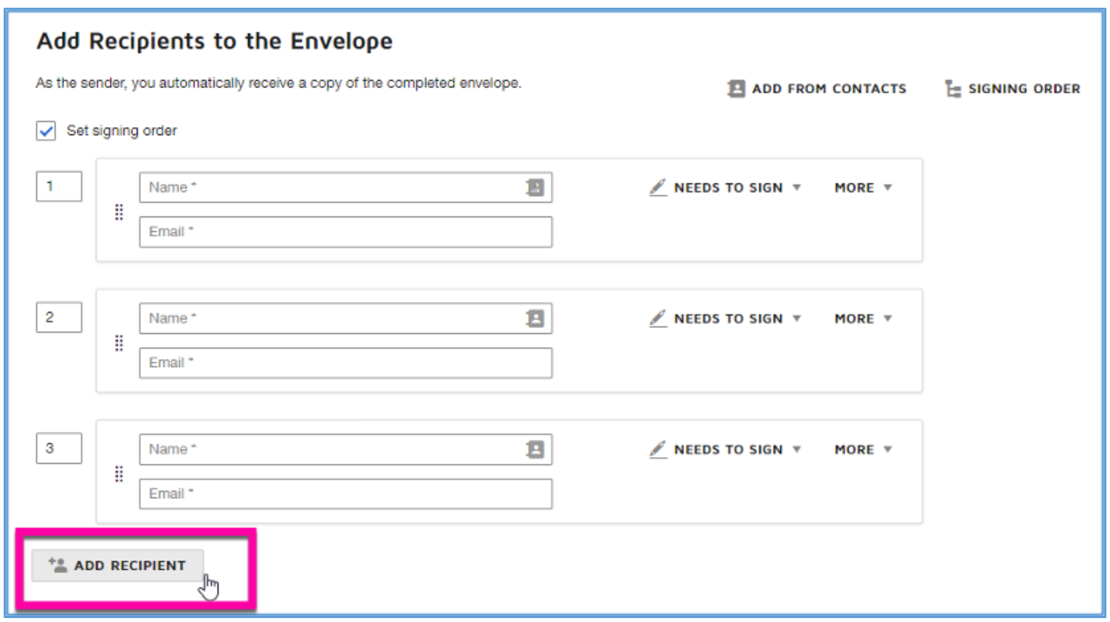
As a requestor, you are responsible for initiating and setting the signing order of the sign-off process.

Set Signing Order & Add Names and Emails

1. Click the **Set Signing order** checkbox:



2. Click **Add Recipient** twice to add two more recipients:



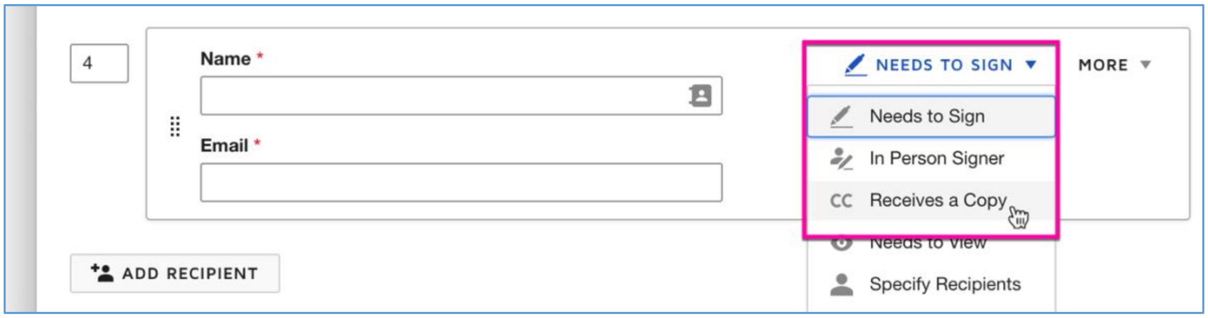
3. Set the Signing Order as follows:

   a. **1:** Add your **name** and **email**

   b. **2+:** The **person** or **persons** from whom you're requesting a signature

4. You can also add additional recipients to only receive a copy if necessary.

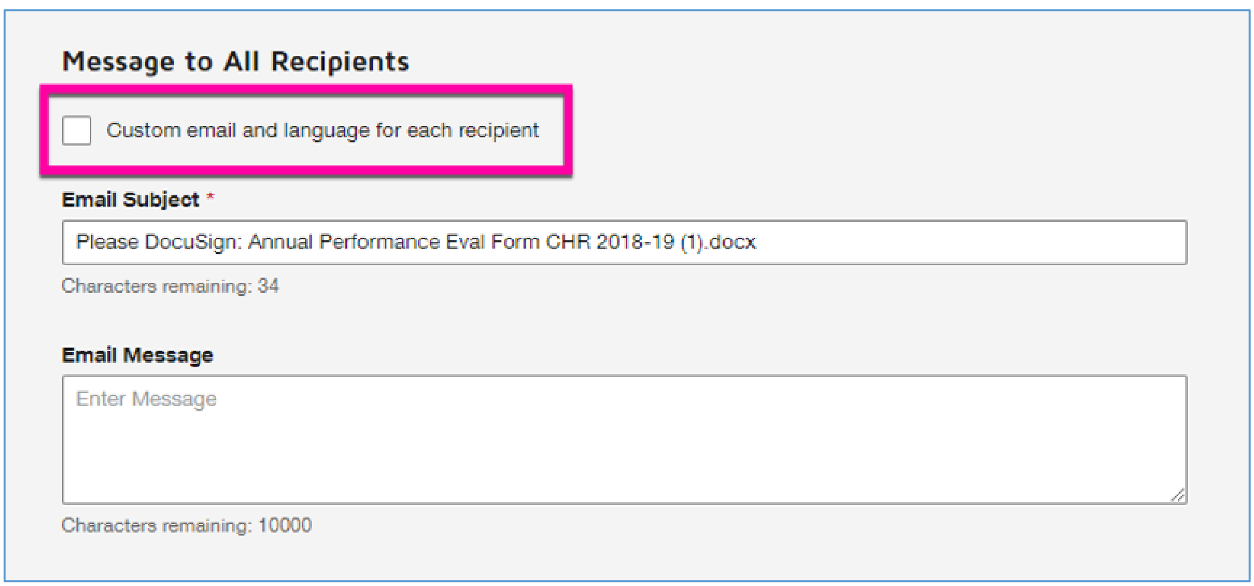
   To do so, click on **Needs to Sign**, then select **Receives a Copy**:



Write a Message to All Recipients

You have the option to write one master email to all recipients or customize the message for each recipient.

If you prefer to do so, click on the **Custom email and language for reach recipient** checkbox. Otherwise, type an **Email Subject** and **Email Message** to send the same message to everyone.

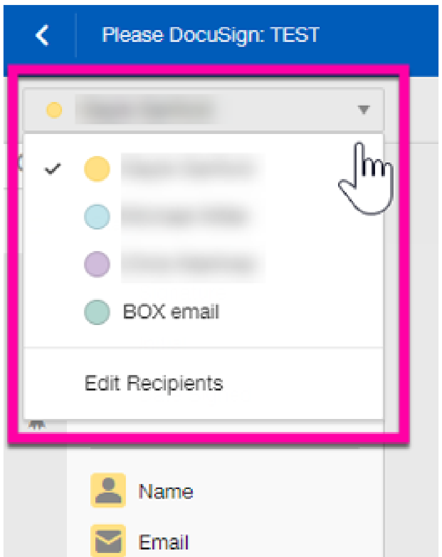


Assign Signature Fields

Once you've finished adding documents, recipients and messages to your envelope, it's time to assign and customize signature requirements on the form.

1. At the top right of the screen click **Next** to add and customize signature fields:

2. At the top left of the screen click on the **drop-down menu** to view the list of **recipients**:



   Note that each recipient is color coded with the default selection being the first recipient.

3. Scroll to the **Required Signatures** section of your document

4. On the left side of the screen you will see a list of **Standard Fields** (e.g. Signature, Initial, Date Signed, etc.)

   Click and drag the following fields to the corresponding fields within the document:

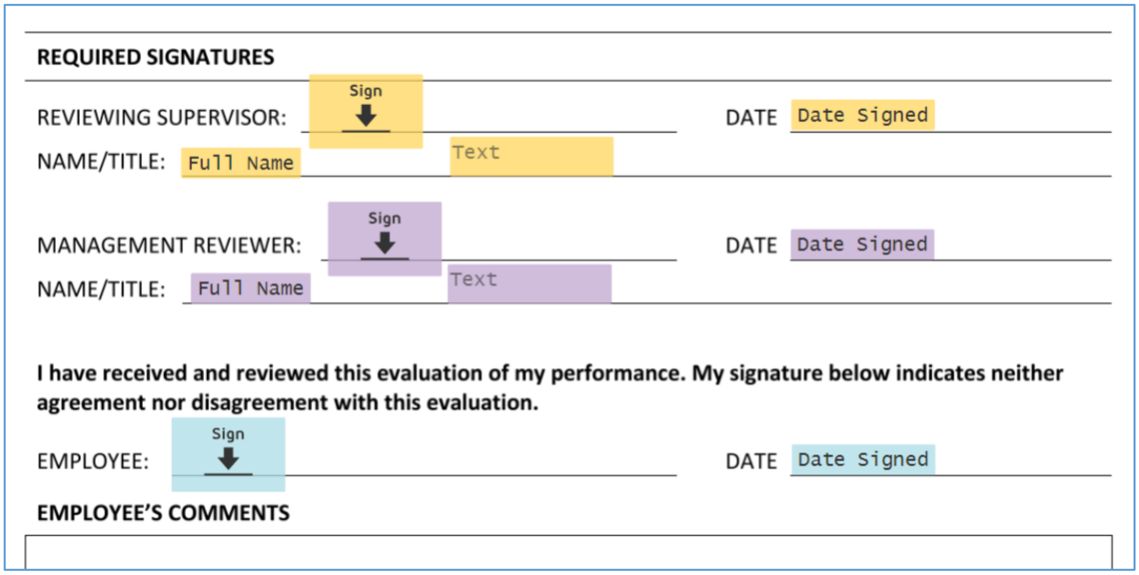
   NOTE: When dragging these fields, be sure to select the correct corresponding recipient from the drop-down list at the top left.

   a. **Supervisor/Manager:** Signature, Date Signed, Name and Text (for Title)

   b. **Employee:** Signature, Date

   c. **Management Reviewer:** Signature, Date Signed, Name and Text (for Title)

5. Arrange the placement of the form fields to your preference. Your document will resemble something like this:



REQUIRED SIGNATURES

REVIEWING SUPERVISOR: Sign DATE Date Signed

NAME/TITLE: Full Name Text

MANAGEMENT REVIEWER: Sign DATE Date Signed

NAME/TITLE: Full Name Text

I have received and reviewed this evaluation of my performance. My signature below indicates neither agreement nor disagreement with this evaluation.

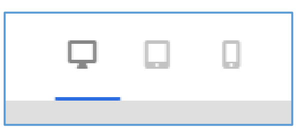
EMPLOYEE: Sign DATE Date Signed

EMPLOYEE'S COMMENTS

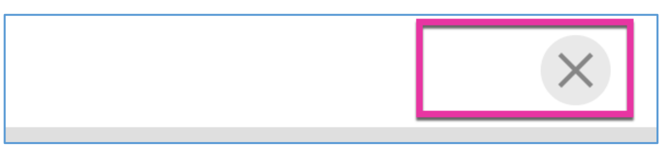
Preview the Envelope

1. Click on **Recipient Preview** for a preview:

2. Note that you can change the preview mode from **desktop** to **tablet** or **mobile phone**:



3. To exit, click on the **exit icon**  at the upper right of the preview window:

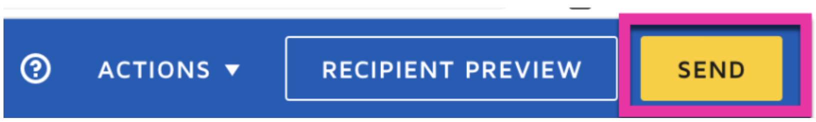


Send the Envelope

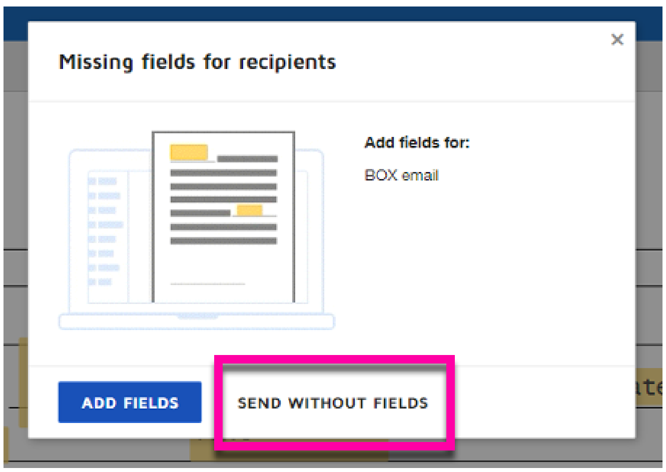
- Sending the envelope triggers an automated workflow determined by signature order; for example, the first recipient has to sign the document in order for the second recipient to receive an email notification, and so on…

- Everyone will receive an email with a copy of the document when all signatures are complete

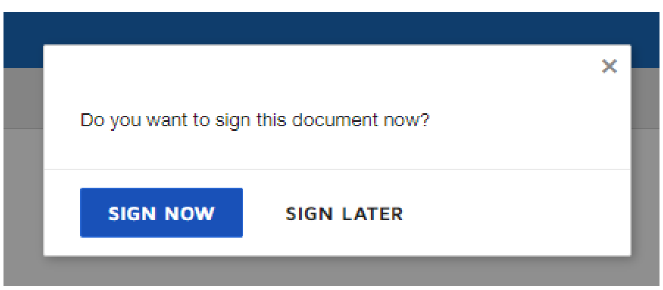
1. When you're ready, click **Send** to initiate the signature workflow:



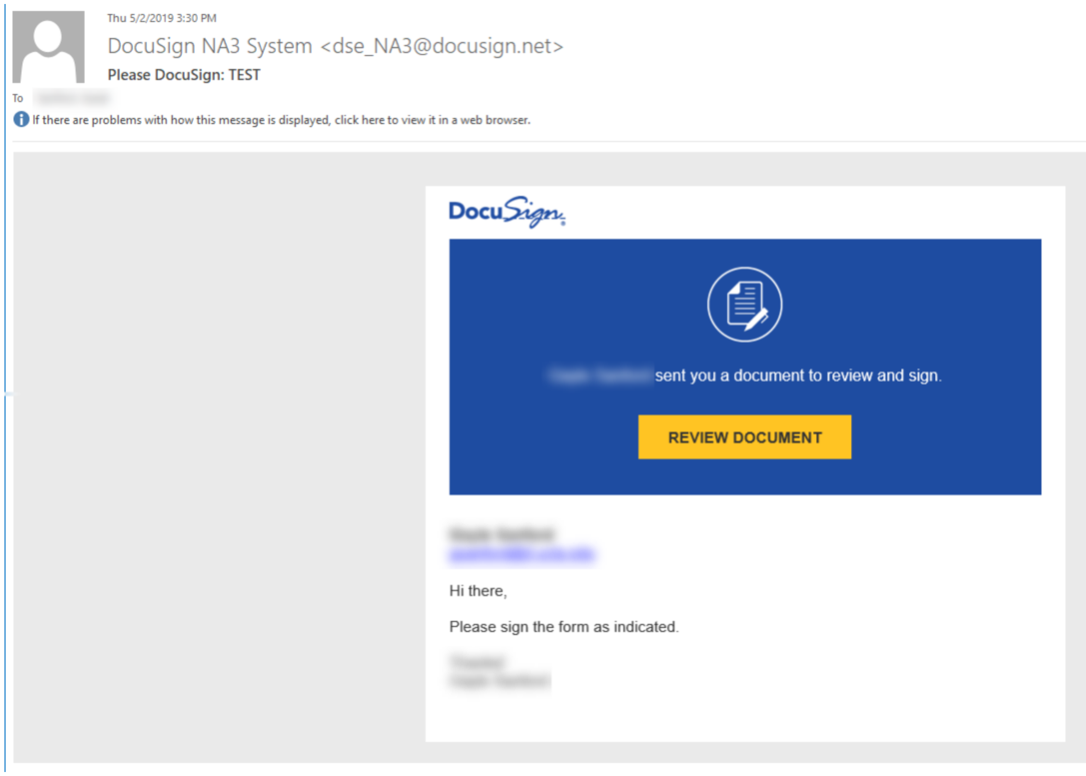
2. If you included the Box Email as a recipient, you'll receive this pop-up indicating that there are missing fields. Click on **Send without Fields**:



3. As the first recipient in the workflow, you'll receive this pop-up asking if you'd like to sign the document now:



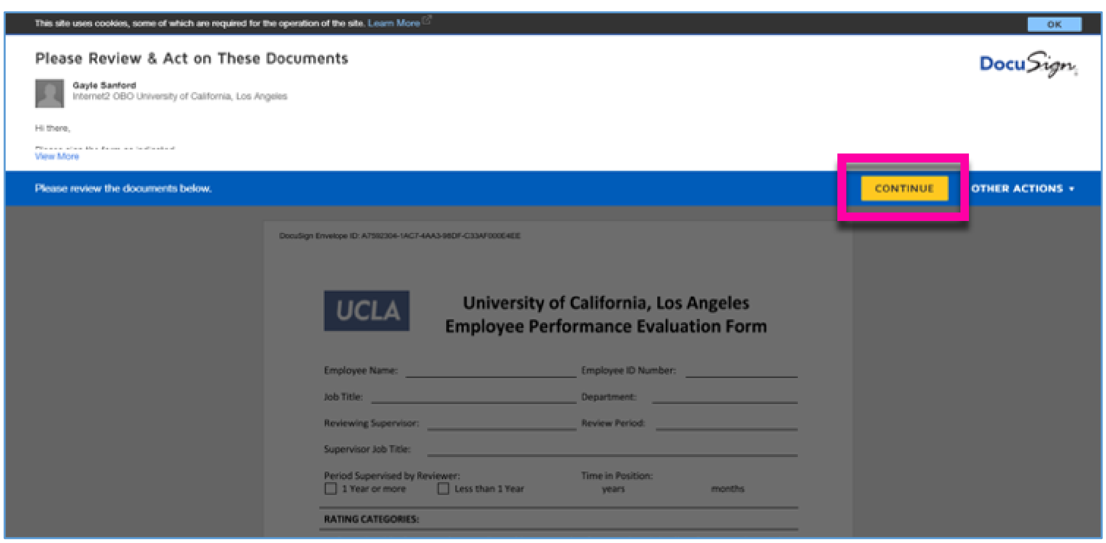
4. You'll also receive an email notification indicating that your signature is requested:



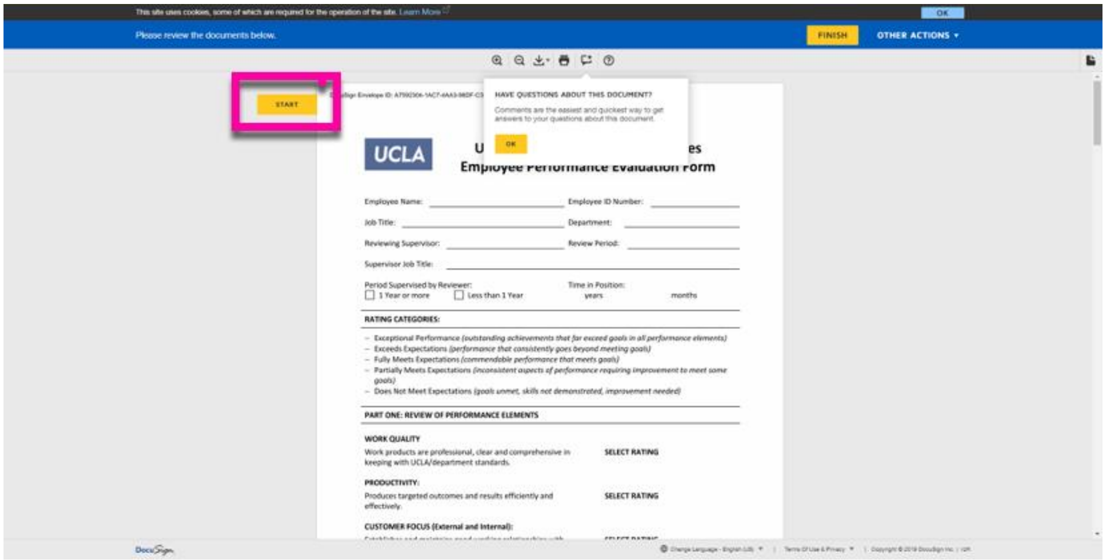
Sign the Envelope

When you **Sign Now** or click on **Review Document** from the email, you're taken to the document for your review.

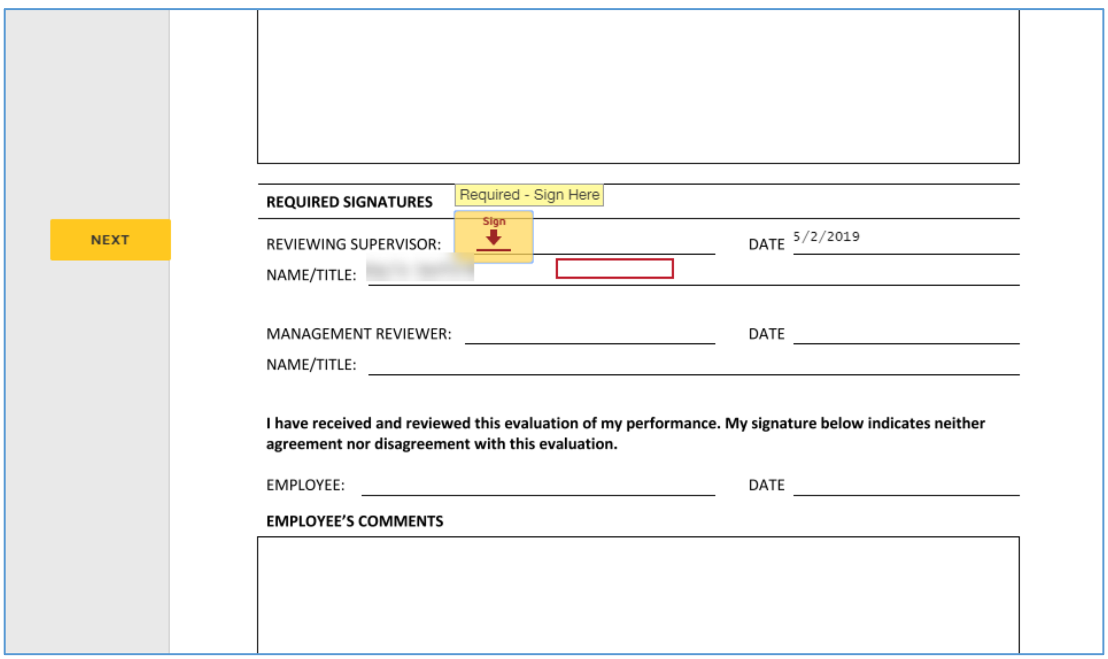
1. Click **Continue** to begin:



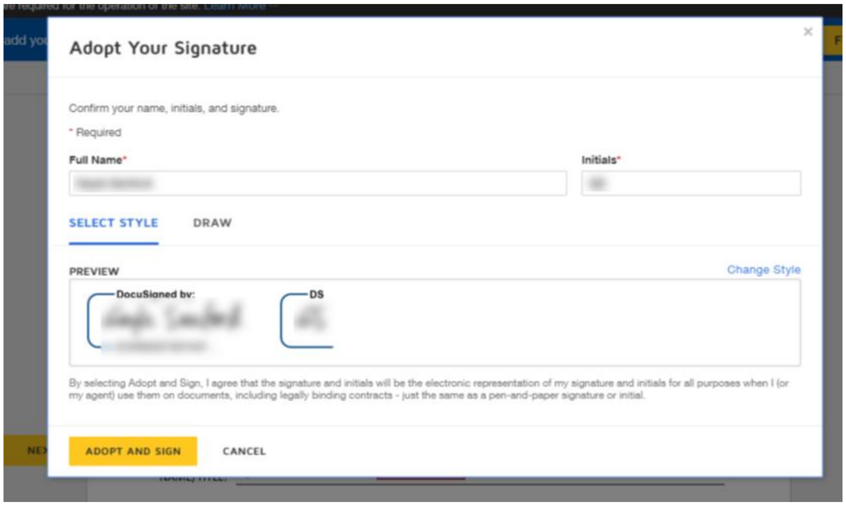
2. Click **Start**:



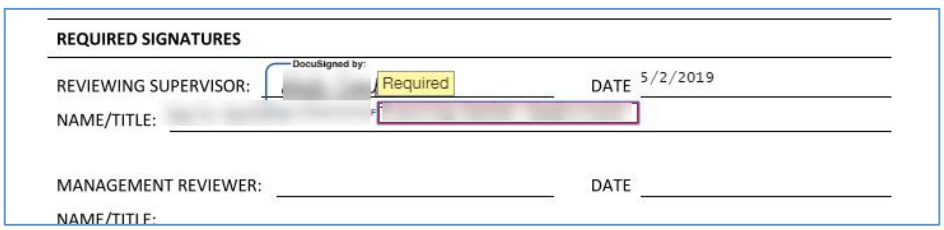
3. This takes to you the **Required Signatures** tab of the document:



4. Click on the **Sign** field icon to **Adopt Your Signature.** Customize your signature as you prefer:



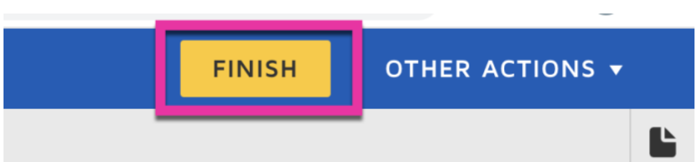
5. Click **Adopt and Sign** when you are finished. This adds your signature to the form:



6. Your **name/title** and **date** auto-fills

7. Type your title in the **Required** text field

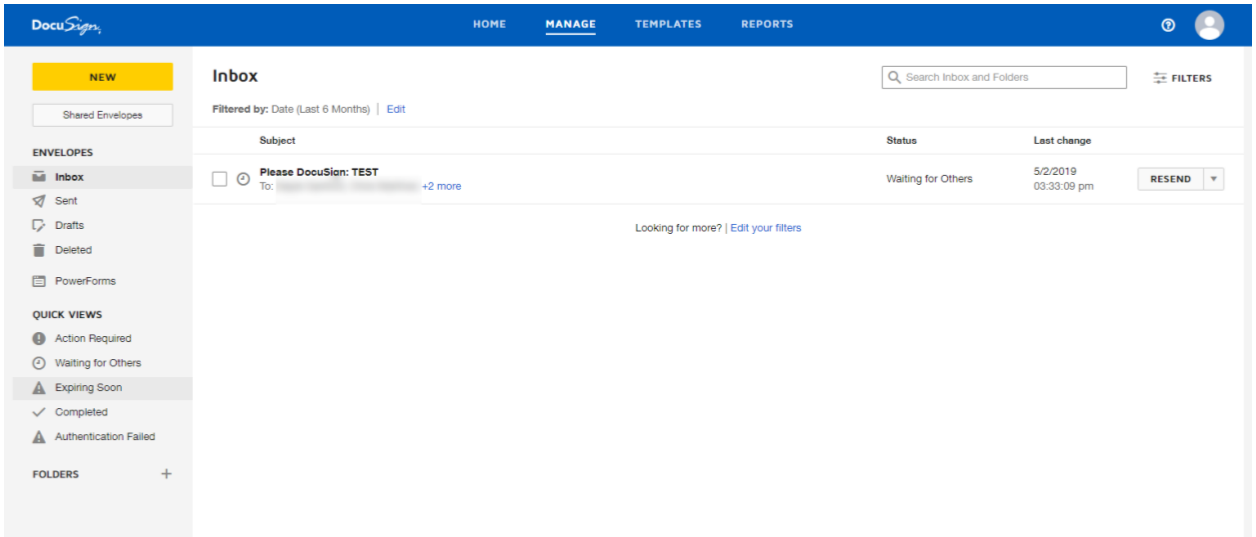
8. Click **Finish** when you're done:



Each person in the workflow (including the Box email) will receive a copy of the completed form once all signatures are captured.

Manage the Envelope

In your DocuSign account, click on the **Manage** tab, then navigate to your **Inbox:**



This shows you outstanding documents pending review.