

DocuSign Sender Instructions

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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:

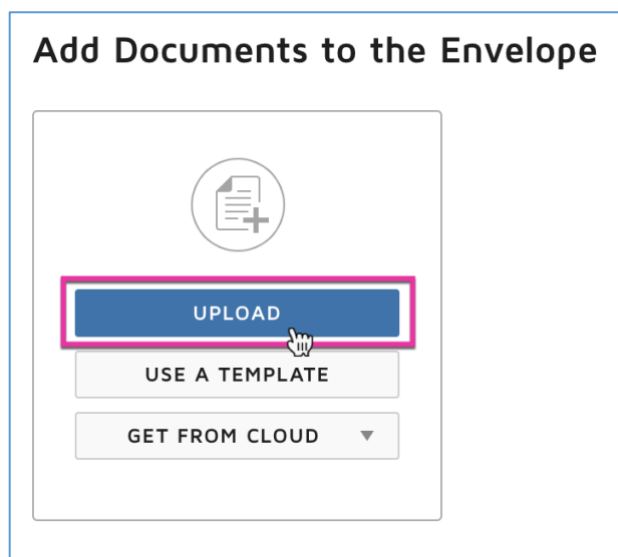
- Add documents to an envelope
- Add recipients to the envelope
- Message all recipients

Add Documents to an Envelope

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



3. Click on **Upload**:



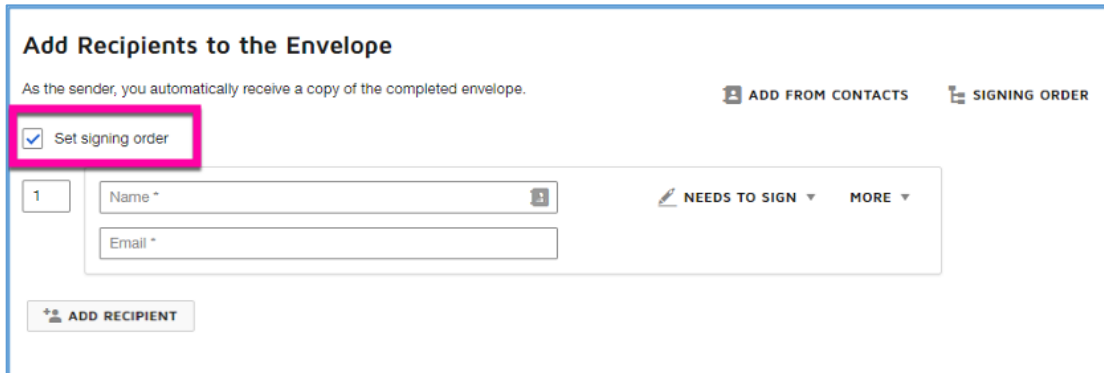
4. Browse and locate the document, then select **Open** from your desktop file browser window
5. Your document is uploaded and displays to the left

Add Recipients to the Envelope

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

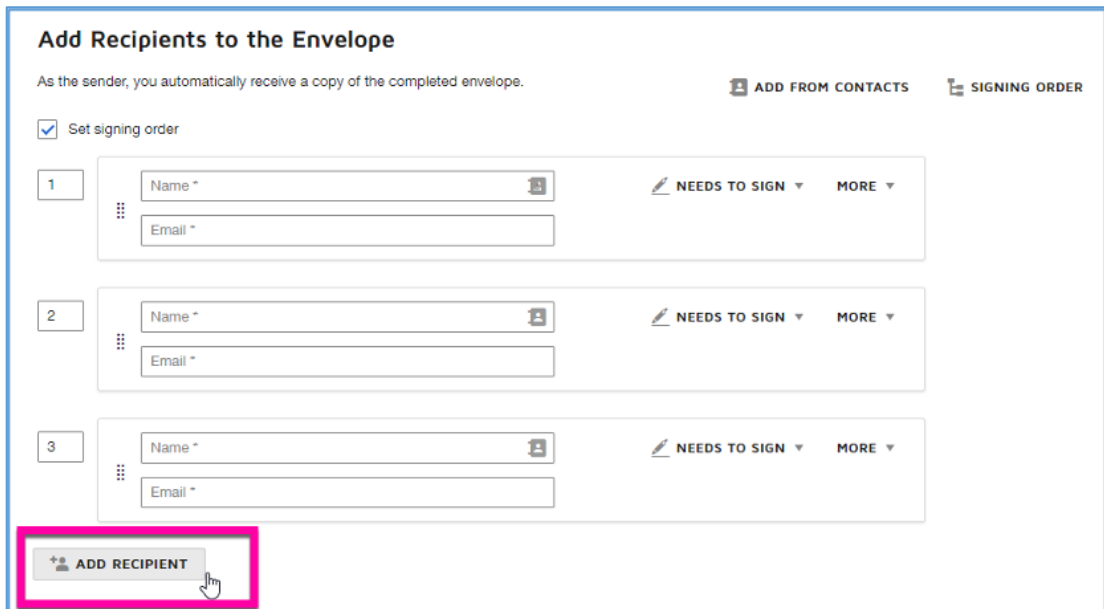
Set Signing Order & Add Names and Emails

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



The screenshot shows the 'Add Recipients to the Envelope' interface. At the top, there are two buttons: 'ADD FROM CONTACTS' and 'SIGNING ORDER'. Below these, a checkbox labeled 'Set signing order' is checked and highlighted with a pink box. Underneath, there is a single recipient entry with a '1' in a box, a 'Name *' field, an 'Email *' field, and buttons for 'NEEDS TO SIGN' and 'MORE'. At the bottom, there is an 'ADD RECIPIENT' button.

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



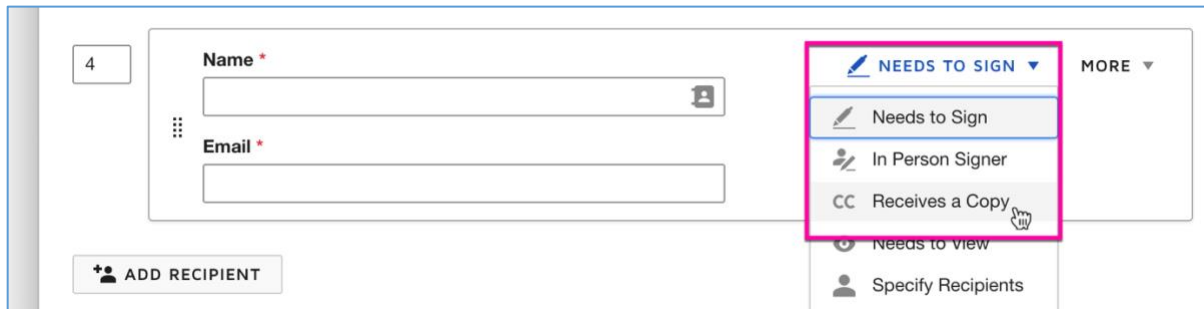
The screenshot shows the 'Add Recipients to the Envelope' interface with three recipient entries. Each entry has a number in a box (1, 2, and 3), a 'Name *' field, an 'Email *' field, and buttons for 'NEEDS TO SIGN' and 'MORE'. The 'Set signing order' checkbox is checked. At the bottom, the 'ADD RECIPIENT' button is highlighted with a pink box and has a mouse cursor over it.

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**:

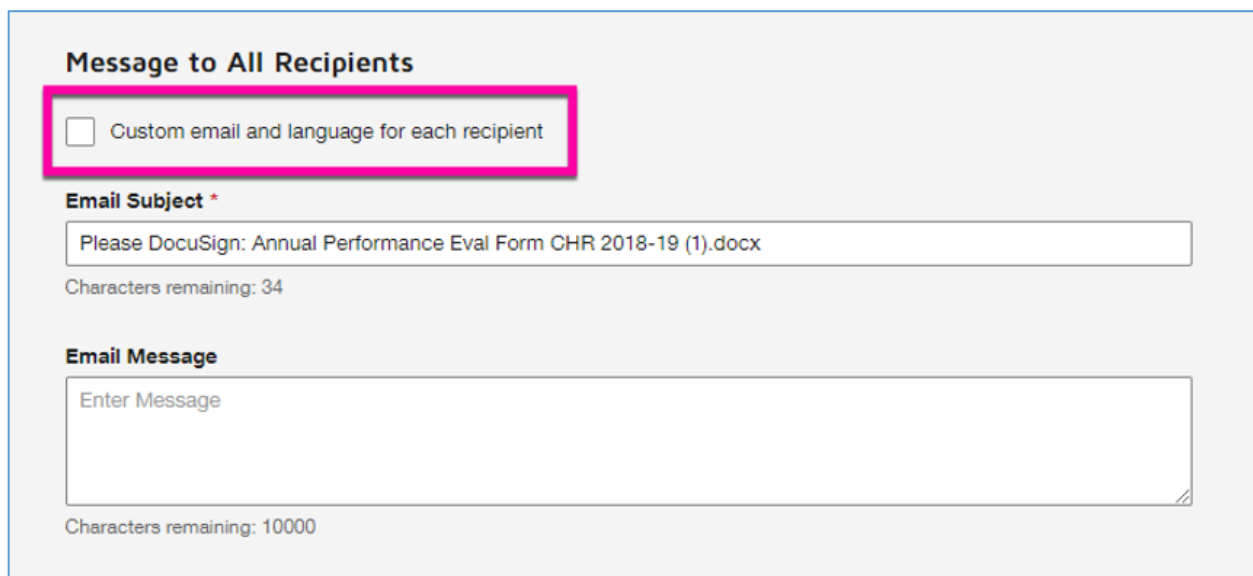


The screenshot shows a form for adding recipients. On the left, there are input fields for 'Name *' and 'Email *', and an 'ADD RECIPIENT' button. On the right, a dropdown menu is open under the 'NEEDS TO SIGN' header. The menu items are: 'Needs to Sign', 'In Person Signer', 'Receives a Copy', 'Needs to view', and 'Specify Recipients'. The 'Receives a Copy' option is highlighted with a pink box.

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.



The screenshot shows the 'Message to All Recipients' section. At the top, there is a checkbox labeled 'Custom email and language for each recipient' which is highlighted with a pink box. Below this, there is an 'Email Subject *' field containing the text 'Please DocuSign: Annual Performance Eval Form CHR 2018-19 (1).docx' and a 'Characters remaining: 34' indicator. Below that is an 'Email Message' field with the placeholder text 'Enter Message' and a 'Characters remaining: 10000' indicator.

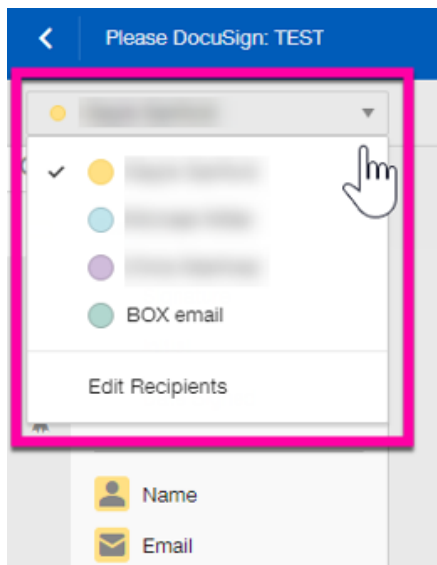
Assign Signature Fields

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 _____

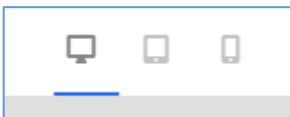
EMPLOYEE'S COMMENTS


Preview the Envelope

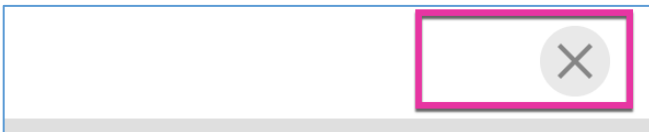
1. Click on **Recipient Preview** for a preview:



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:

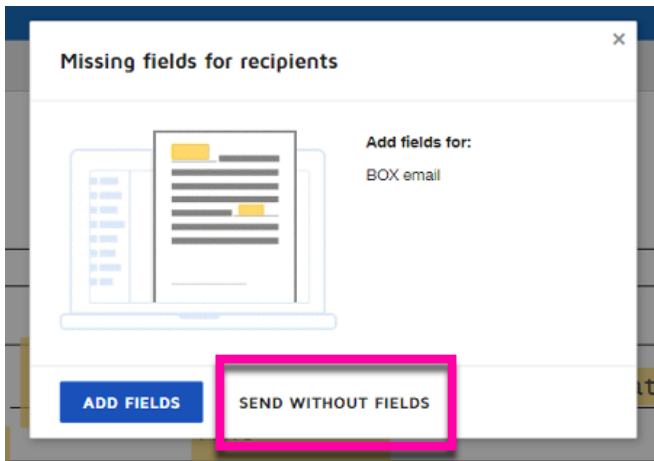


Send the Envelope

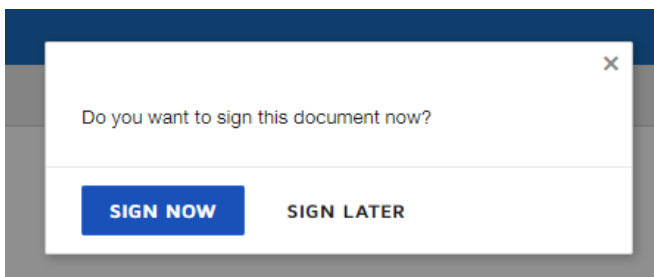
- Sending the envelope triggers an automated workflow determined by signature order; for example, the first recipient has to sign the document in order for the second recipient to receive an email notification, and so on...
 - Everyone will receive an email with a copy of the document when all signatures are complete
1. When you're ready, click **Send** to initiate the signature workflow:



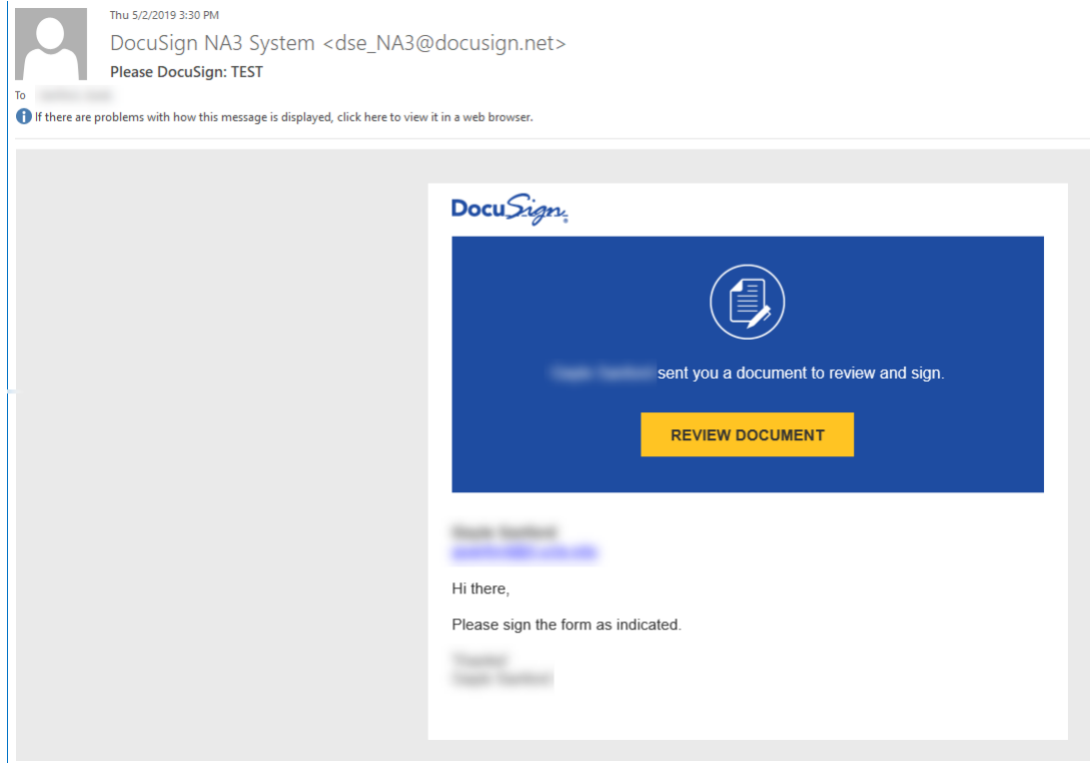
2. If you included the Box Email as a recipient, you'll receive this pop-up indicating that there are missing fields. Click on **Send without Fields**:



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



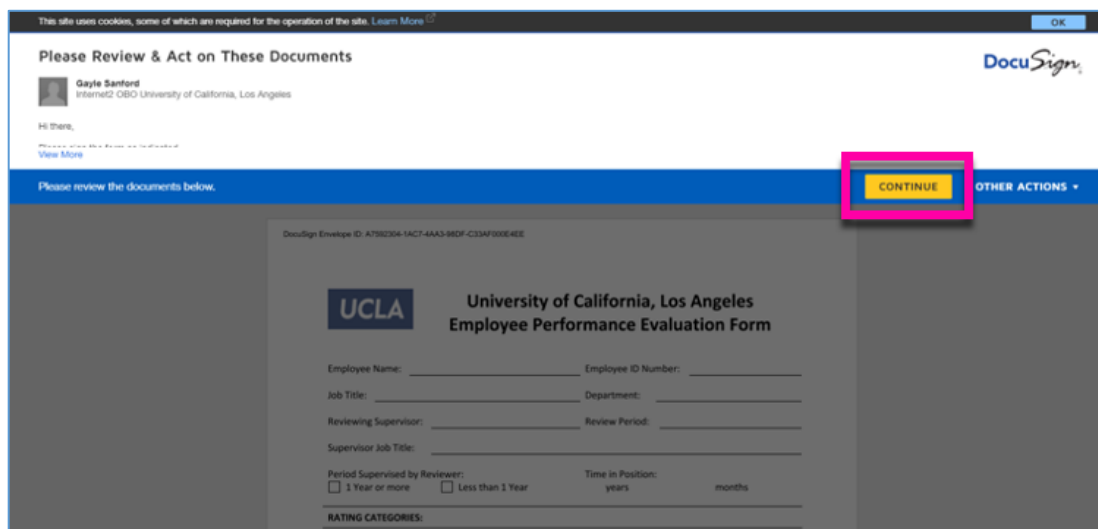
4. You'll also receive an email notification indicating that your signature is requested:



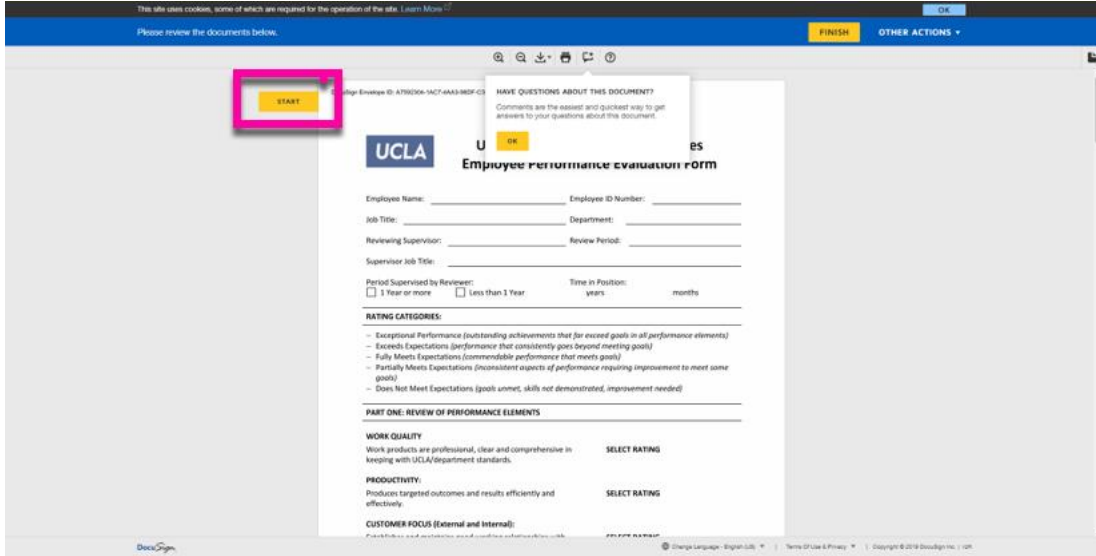
Sign the Envelope

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:



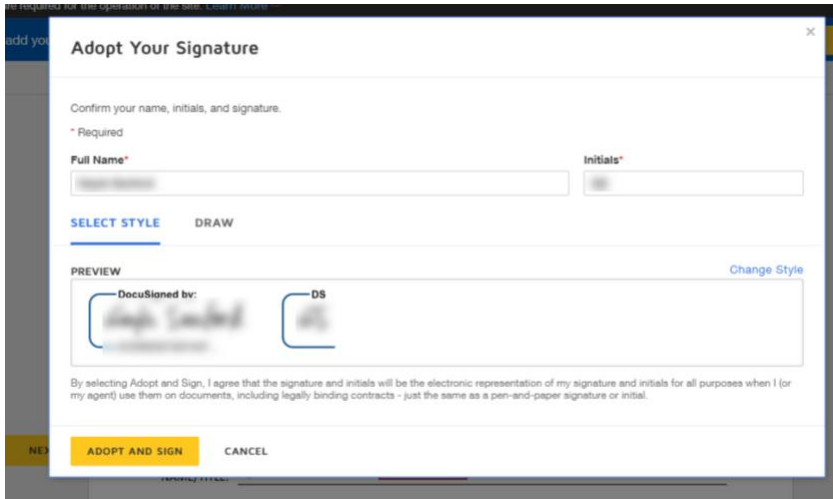
2. Click **Start**:



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

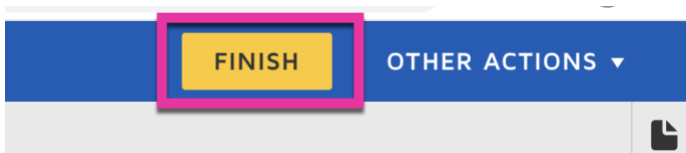
The screenshot shows the "Required Signatures" tab of the document. On the left, there is a yellow "NEXT" button. The main content area has a "Required - Sign Here" tab. Below this, there are fields for "REVIEWING SUPERVISOR" (with a "Sign" button and a red arrow pointing down), "DATE 5/2/2019", "NAME/TITLE", "MANAGEMENT REVIEWER", "DATE", "EMPLOYEE", "DATE", and "EMPLOYEE'S COMMENTS".

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**:

The screenshot displays the DocuSign 'Manage' interface for the 'Inbox'. The top navigation bar includes 'HOME', 'MANAGE', 'TEMPLATES', and 'REPORTS'. The 'MANAGE' tab is active. The main content area shows a table of envelopes. The table has columns for 'Subject', 'Status', and 'Last change'. A search bar and a 'FILTERS' button are located at the top right of the table area. The table is filtered by 'Date (Last 6 Months)'. One envelope is listed with the subject 'Please DocuSign: TEST', status 'Waiting for Others', and last change on '5/2/2019 03:33:09 pm'. A 'RESEND' button is visible next to the envelope. The left sidebar contains a 'NEW' button, a 'Shared Envelopes' button, and sections for 'ENVELOPES' (Inbox, Sent, Drafts, Deleted, PowerForms), 'QUICK VIEWS' (Action Required, Waiting for Others, Expiring Soon, Completed, Authentication Failed), and 'FOLDERS'.

Subject	Status	Last change
Please DocuSign: TEST To: [redacted] +2 more	Waiting for Others	5/2/2019 03:33:09 pm

This shows you outstanding documents pending review.