

DocuSign:

Prepare and Send a Document for eSignature

DocuSign allows all CDFW Employees to send documents electronically for eSignature. This guide shows you how to:

1. Access DocuSign – All CDFW Employees have access to DocuSign, which allows you to send documents to anyone within CDFW for eSignature.
2. Establish an Electronic Signature – You only need to establish your signature the first time you log into DocuSign.
3. Create a DocuSign Document – By creating an “Envelope,” you are able to upload your document and send to the recipients who need to sign the document.
4. Track/Download/Print Signed Documents – You can track signature status for each envelope and download/print documents with eSignatures.

Advanced DocuSign features not covered in this guide are available here:

<https://support.docusign.com/en/guides/ndse-user-guide-send-a-document>

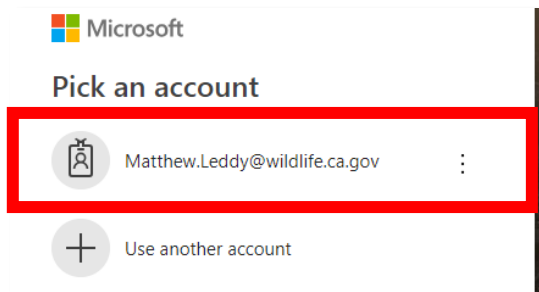
Contents

Access DocuSign	2
Establish a Signature	2
Create a DocuSign Document.....	4
Add Document to the Envelope.....	4
Add Recipients to the Envelope	5
Add Messages to the Envelope.....	6
Add Fields to the Document.....	6
Send DocuSign Document.....	7
Track/Download/Print Document.....	7
Check Document Status.....	7
View/Print a Completed Document.....	8

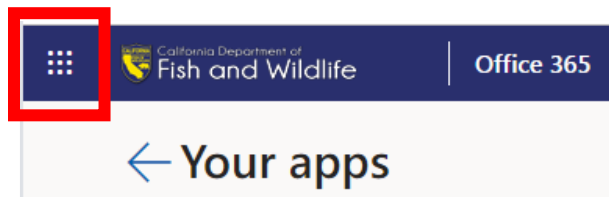
Access Docusign

Step 1 Visit portal.office.com

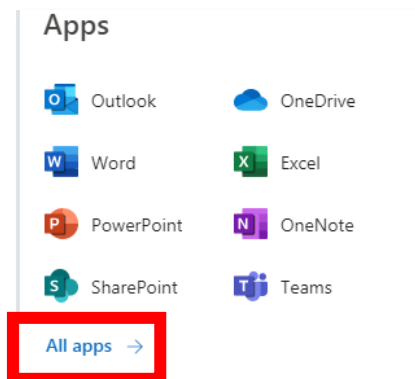
Step 2 Click on **your account** to sign into Microsoft Office 365:



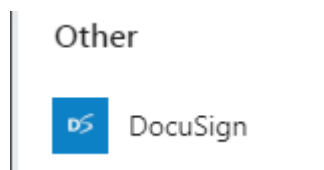
Step 3 From the Office 365 main page, click on the **menu tile** in the upper left corner to open the side menu bar:



Step 4 From the side menu, click on the link titled "All Apps."

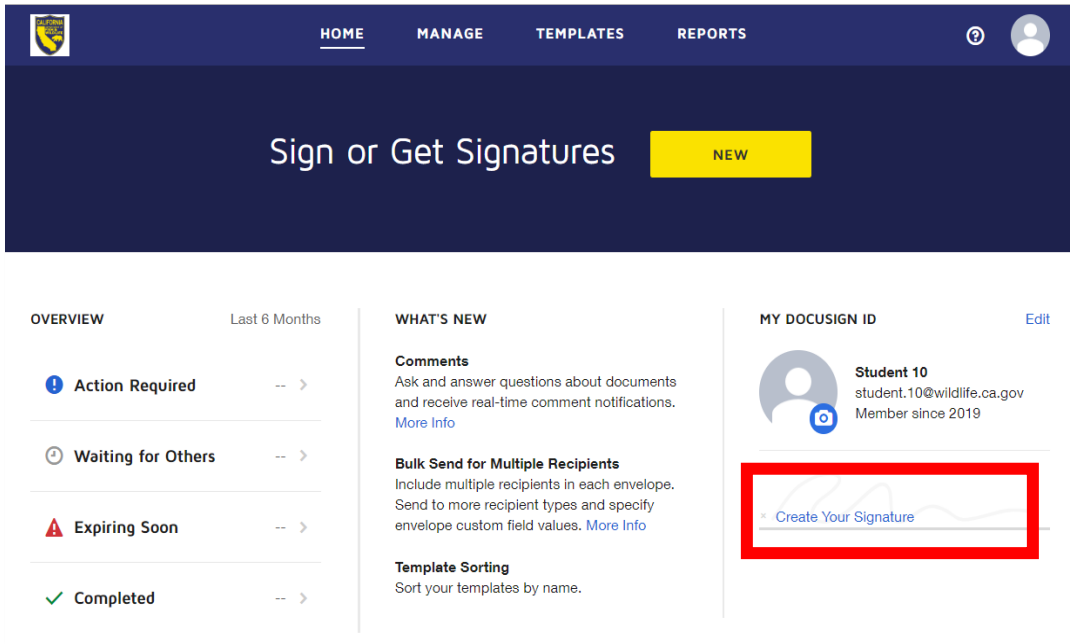


Step 5 Scroll to the bottom of the listed apps and click on the **DocuSign** icon. You will be automatically signed into your DocuSign account:

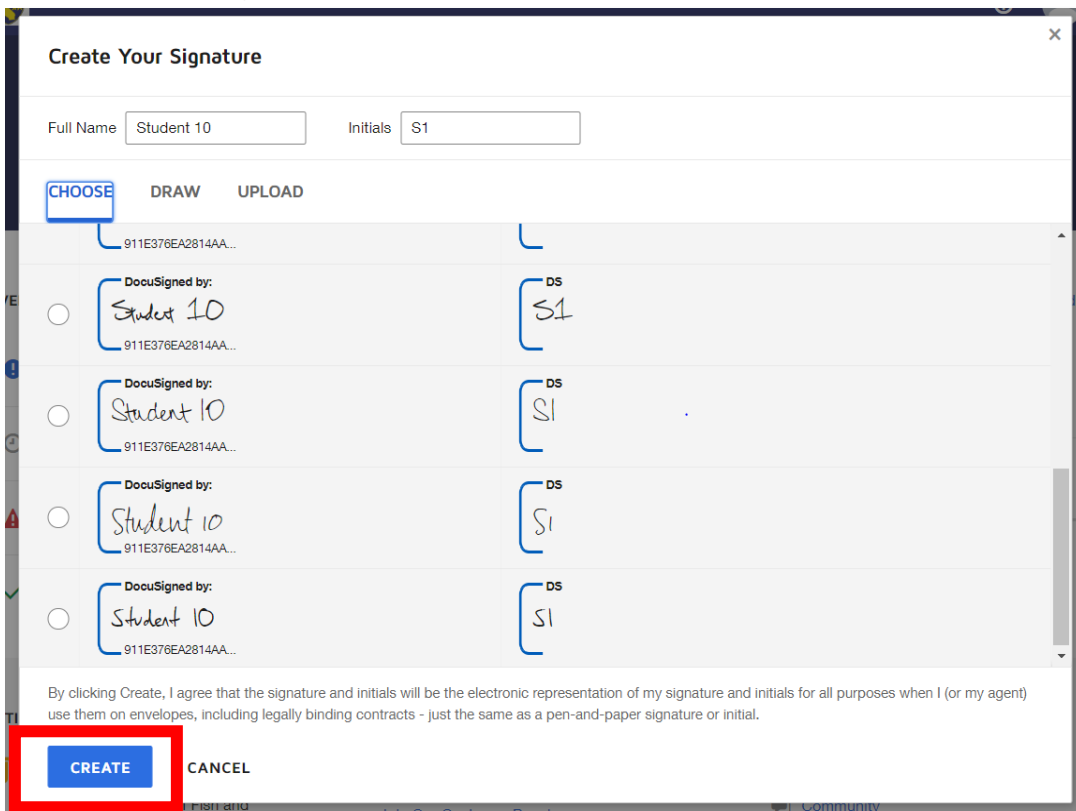


Establish a Signature

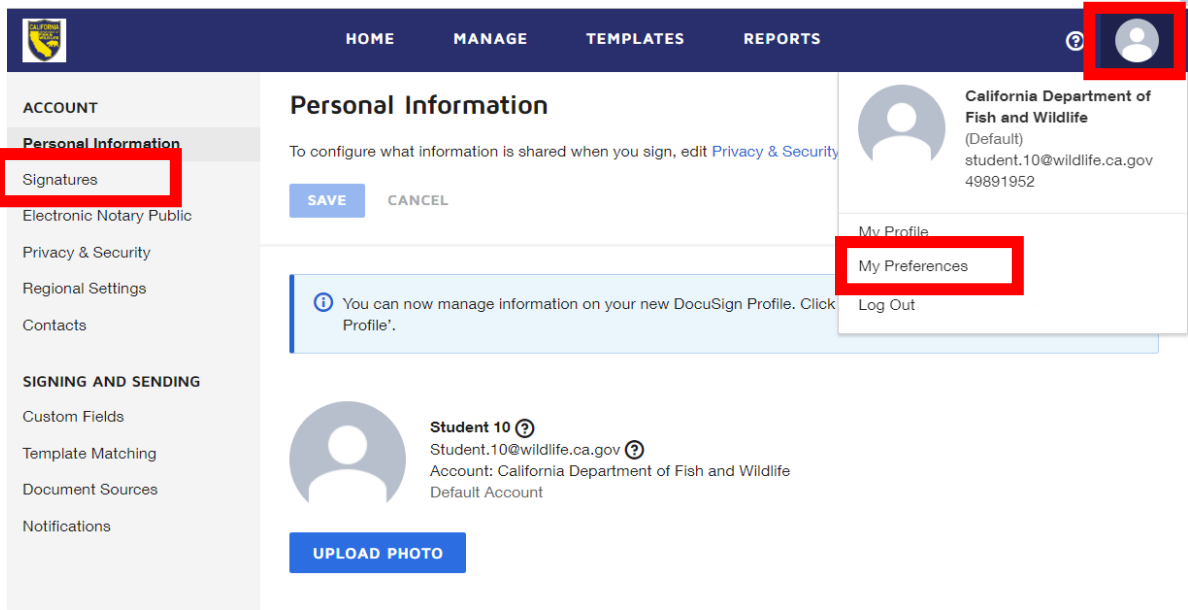
Step 1 Click on the **"Create Your Signature"**



Step 2 Choose one of the three options to create your signature (Using a template, draw your own or upload an image) and click the **“Create”** button.



Step 3 After you’ve established your signature, you can change it at any time by going to **Account > My Preferences > Signatures**.



Create a DocuSign Document

Step 1 From the DocuSign home page, click on the “New” button and select “Send an Envelope”



Step 2 [Add Document to the Envelope](#)

- Under the “Add Documents to the Envelope” section, click “Upload”



- Browse and select the document you want to upload. Once uploaded, a preview of the document will appear.

Step 3 Add Recipients to the Envelope

- Under the “Add Recipients to the Envelope” section, enter the **Name** and **Email** of your first recipient

Note: If you need to add more than one recipient, click the “Add Recipients” button and add their name and email. You can add as many recipients as needed and set the options for each recipient (including the type of action and signing order).

- Once you have added your recipients, you will need to select the requested action for each recipient from the drop-down arrow next to the recipient’s name. Typically, you would leave this option as “Needs to Sign.” However, there are other options to just list a recipient as a CC that does not need to sign.

- If you have more than one signer, you can set the signing order by clicking on the “Set Signing Order” checkbox. For detailed instructions on setting a signing order, please visit: <https://docs.docusign.com/DocuSignHelp/Content/signing-order.htm>

Step 4 [Add Messages to the Envelope](#)

- Under the “Message to All Recipients” section, enter custom **Email Subject** and **Email Message** of the envelope

Message to All Recipients

Custom email and language for each recipient

Email Subject *
Please DocuSign: HRMS - Exit Clearance - SupervisorJobAid.pdf
Characters remaining: 39

Email Message
Enter Message
Characters remaining: 10000

- Click on the “Next” button at the bottom right of the page:

SEND NOW **NEXT**

Note: if you uploaded a fillable PDF(PDF document that includes certain fields that are editable without PDF-editor software.), DocuSign will display a pop-up after you click the “Next” button. It is recommended to select the “Delete Data” option and add the fields yourself as described in the next section.

Manage PDF form field data [X]

What would you like to do?

Assign to:
-- Select Recipient --

Keep PDF form data

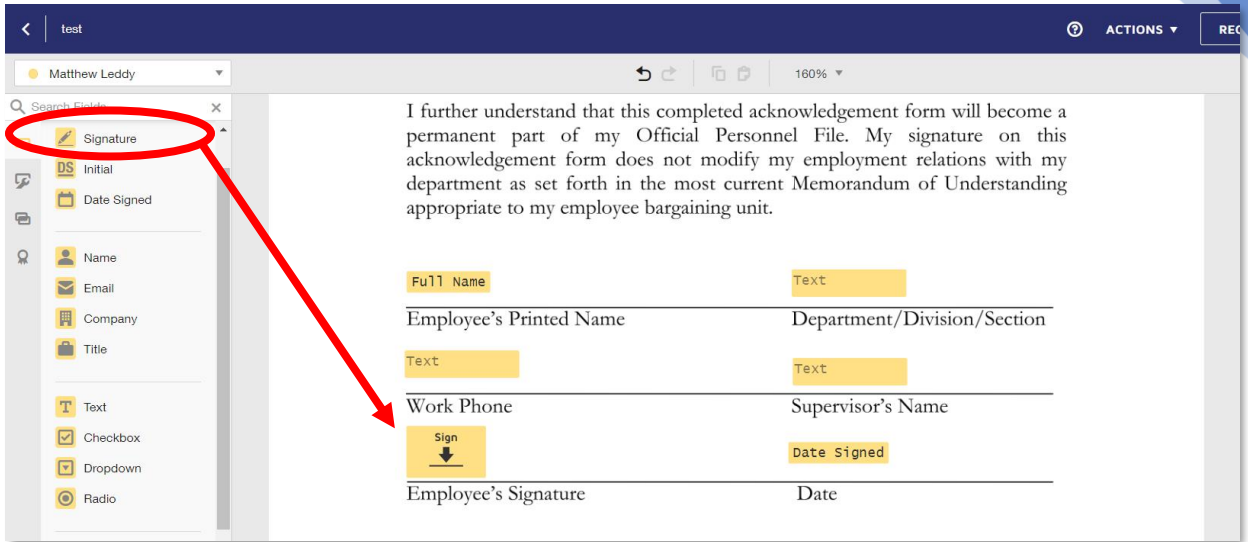
Delete data

CONFIRM

Step 5 [Add Fields to the Document](#)

- To add standard fields to the document (e.g. Signature, Name, Date, etc.), drag and drop selected fields into your document. Think of this as adding a “Sign Here” tag to a physical document.

[Image on next page]



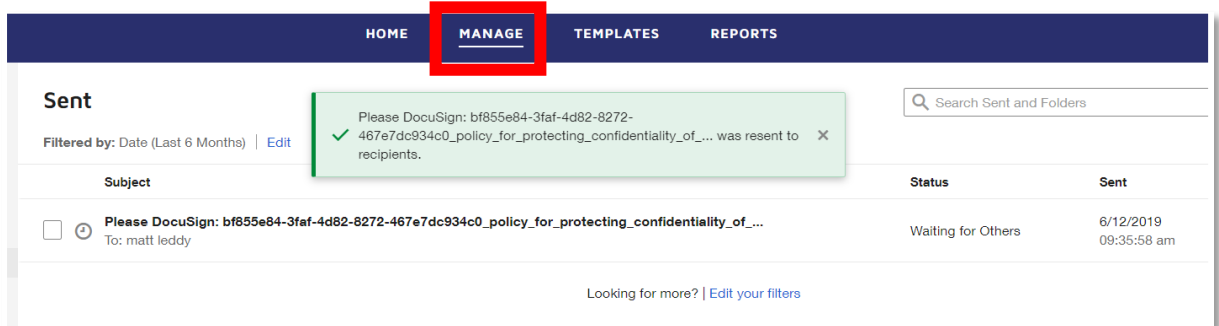
Step 6 Send DocuSign Document

1. Click on the **“Send”** button in the bottom right to send your document for signatures. Emails will be sent to the recipient(s) requesting eSignature. You will be notified by DocuSign via email once each signature is completed.



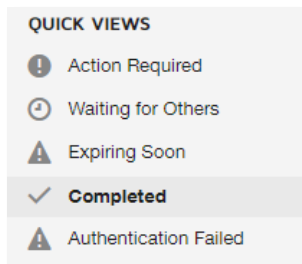
Track/Download/Print Document

Step 1 Click on the **“Manage”** tab at the top of the page




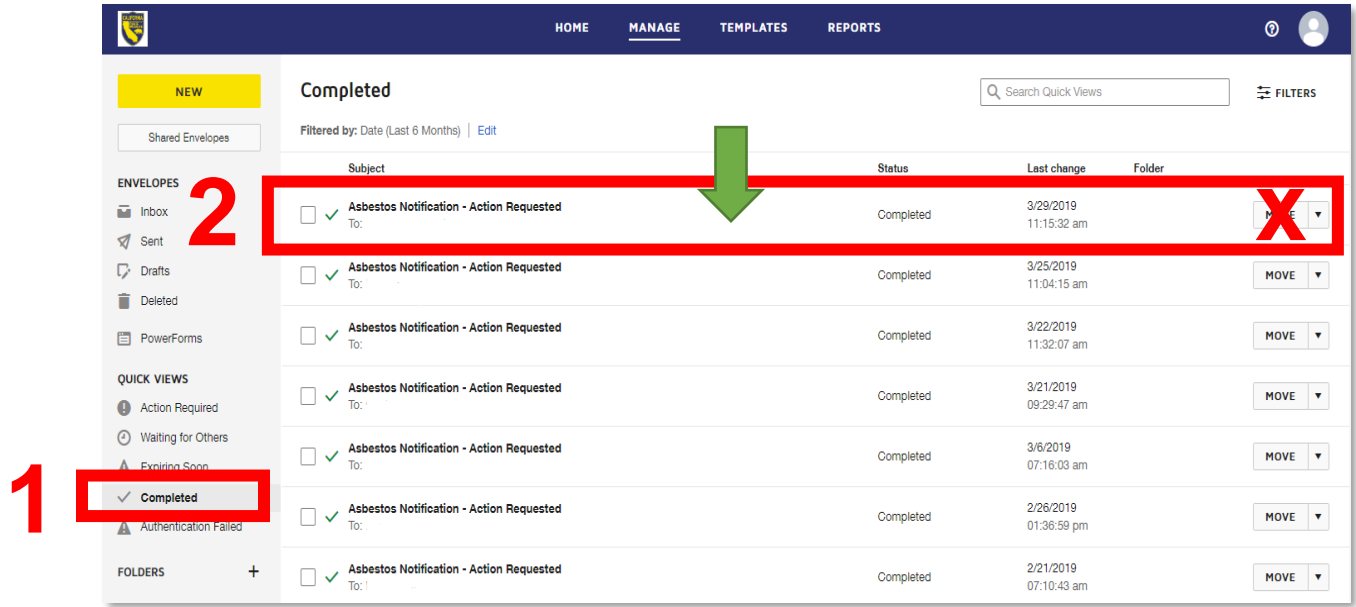
Step 2 Check Document Status

- Under the **“Quick Views”** heading in the left navigation bar, you can check on the various statuses of your documents.



Step 3 [View/Print a Completed Document](#)

- Under the “Quick Views” heading in the left navigation bar:
 1. Click on the “**Completed**” link.
 2. Click on the individual record you want to view (do not click the drop down next to the record **X** , click in the middle of the record )

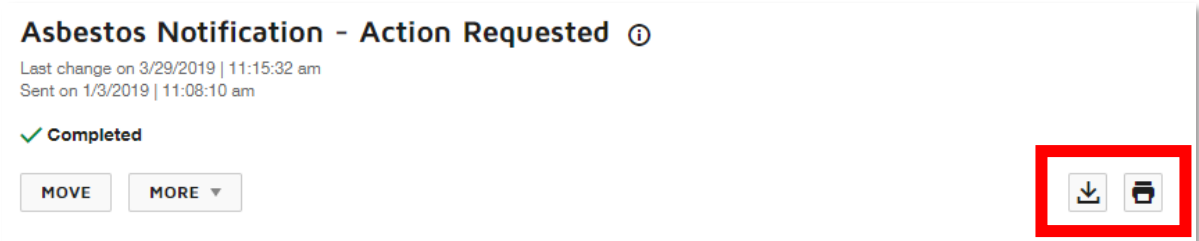


The screenshot shows the DocuSign interface with the following elements:

- Navigation Bar:** HOME, MANAGE, TEMPLATES, REPORTS
- Left Sidebar:**
 - NEW:** Shared Envelopes
 - ENVELOPES:** Inbox, Sent, Drafts, Deleted, PowerForms
 - QUICK VIEWS:** Action Required, Waiting for Others, Expiring Soon, **Completed** (highlighted with a red box and '1'), Authentication Failed
 - FOLDERS:** +
- Main Content Area:**
 - Completed** (Section Header)
 - Filters:** Filtered by: Date (Last 6 Months) | Edit
 - Table:**

Subject	Status	Last change	Folder
<input type="checkbox"/> ✓ Asbestos Notification - Action Requested To: [redacted]	Completed	3/29/2019 11:15:32 am	[redacted] X
<input type="checkbox"/> ✓ Asbestos Notification - Action Requested To: [redacted]	Completed	3/25/2019 11:04:15 am	MOVE
<input type="checkbox"/> ✓ Asbestos Notification - Action Requested To: [redacted]	Completed	3/22/2019 11:32:07 am	MOVE
<input type="checkbox"/> ✓ Asbestos Notification - Action Requested To: [redacted]	Completed	3/21/2019 09:29:47 am	MOVE
<input type="checkbox"/> ✓ Asbestos Notification - Action Requested To: [redacted]	Completed	3/6/2019 07:16:03 am	MOVE
<input type="checkbox"/> ✓ Asbestos Notification - Action Requested To: [redacted]	Completed	2/28/2019 01:36:59 pm	MOVE
<input type="checkbox"/> ✓ Asbestos Notification - Action Requested To: [redacted]	Completed	2/21/2019 07:10:43 am	MOVE

- Click on the **Download** or **Print** icons on the left side of the page to download/print the document.



The screenshot shows the document detail view with the following information:

- Title:** Asbestos Notification - Action Requested ⓘ
- Metadata:** Last change on 3/29/2019 | 11:15:32 am; Sent on 1/3/2019 | 11:08:10 am
- Status:** ✓ Completed
- Actions:** MOVE, MORE
- Download/Print:** Download and Print icons (highlighted with a red box)