DocuSign User Guide

Signing Documents Electronically

2012
SIGNING BASICS

This guide provides information on how to access and sign a proposal package envelope using DocuSign®. Electronic signing provides a quick, easy, and secure method for you to sign and internal research forms.

ACCOUNT SETUP

A DocuSign® account is not necessary to review or sign a proposal package, but it may be useful for tracking documents that require your signature or attention. Accounts can be created by the user once an envelope has been routed or by the RAS Research Systems staff upon request.

GETTING STARTED

As a signer, your first experience with DocuSign® is an email notifying you of a document needing your review and approval. The email is sent from DocuSign® on behalf of the PI.

Click on the Review Documents link in the email to start the signing process.

GENERAL NONDISCLOSURE AGREEMENT

This page provides a short overview of the signing process and has the consumer disclosure between DocuSign® and Howard University.

Select the checkbox to agree to conduct business electronically with Howard University and click the Review Document button to continue.

Important!
The Finish Later and Decline to Sign options will be discussed later and should be ignored at this point.
THE PROPOSAL PACKAGE ENVELOPE

Once you have agreed to the disclosure, you will be sent to the proposal package envelope. This envelope includes some of the most common forms required by RAS before a proposal can be submitted. It also includes additional documents attached by the PI.

ENVELOPE LAYOUT

There are several sets of controls available when looking at the envelope.

The right side of the page has icons that represent actual pages in the document. You can click on a page icon to jump to that page or use the scroll bar to navigate to a page.

- Grey pages contain information to read-only.
- Green pages have fillable fields and options.
- Gold pages have objects that require your action.

The indicator icon on the left side is used to guide you through the process of completing and signing the envelope. The text shown in the indicator arrow displays the action you are expected to take. The text in the arrow changes as the indicator guides the signer through the envelope. The images below are examples of possible indicator arrows and with the expected actions:

Click the **Sign Here** or **Initial** tab to place a signature or initial in the document. You will be asked to adopt a signature.

After adding information to a page, you can click **Next Page** to go to the next page.

Once all of the required tasks are met, you can review the document and **Confirm Signing**. This will complete the process for you. The next person in line will now have to sign.
Important!
All gold page icons must be green in order to send this to the next person in the routing structure. There are some pages that require you to choose an option from a dropdown box.

MORE OPTIONS

Located at the top-left of the screen is a button that says “More Options.” Clicking this button reveals other features available to you while you are completing your envelope.

• **View History:** This option shows envelope data and history.
• **View Certificate:** This option opens a PDF version of the certificate of completion, which includes information about the envelope events.
• **View Consumer Disclosure:** This option shows the consumer disclosure for the envelope.

CHANGE SIGNER

If you received the request to sign in error or wish to have someone else sign for you, you can use this option. Enter the name and email address of the person who should receive the envelope for approval.

You are asked to provide the new signer’s email address, name and a reason for changing the signer. The reason for changing the signer is sent to the PI, along with the new signer’s name and email.

You may click Back to return to the envelope if you do not wish to change the signer.

Clicking Change Signer will reassign the envelope to the specified signer. The PI and new signer will be notified of the change and you become a CC recipient of the envelope.
DECLINE TO SIGN

If the submission is totally incorrect, you may wish to decline to sign the document. Use this ONLY if you feel that this project should not be supported at all. The PI will have to resubmit a new envelope. You will have to submit a reason for your decision to decline the envelope.

Be sure NOT to check the checkbox at the bottom. Checking this box will prevent any submissions from the PI to be sent to you for approval.

You may click Back to return to the envelope if you do not wish to decline signing the document.

MARKUP

There may be times when you need to be able to suggest changes or negotiate other aspects of a document. For example, you would like to suggest that the PI change the wording of a clause in the document. Using this will allow the PI to make minor changes to the document without having them resubmit a new envelope.

With the Document Markup feature, you can suggest that the PI make changes and additions to a document through, while managing approval initials from all signers for the changes and maintaining a secure audit trail of the changes.

The markup tool is used to add new text in a blank region of the document. Changes made by the PI must be reviewed and approved by all other recipients of the document. Recipients that signed a document before the changes were made are given a new opportunity to review and approve the changes before the document is finalized.

Review the information in the dialog box. Optionally you can select to skip this dialog box in the future. Click Continue to enable the markup.
Click and drag the Markup tool onto the document. Use the edges of the textbox to change its size to meet your needs.

**Important!**
You will not be able to place the Markup box on an existing text box or any other fillable object. It is recommended that Page 1 is used for Markups.

- To remove a markup box from the document, click in the markup box and click the X that appears in the top-right corner.
- After adding any changes with the Markup tool, a small initial tab will appear to the far right of the page. You will be required to initial the Markup before you can complete the envelope.
- Complete signing the envelope normally. Your signature is confirming the markup, not the submission in its current state. The envelope will be routed to the PI for review and change.

**FINISH LATER**

This option lets you save what you have done. You may return to the document by accessing the **Review Document** link in the Email that was sent to you.

**SIGNING DOCUMENTS**

This portion of the guide will show you how to sign or initial documents within the envelope. When you click on a **Sign Here** or **Initial** tab, you will be asked to adopt a signature and initials. Each signature has its own id code that links the signature to the email address of the signer. Since these are in-house documents and the identification code verifies the identity of the signers, RAS has agreed to accept any of these signatures.
ADOPTING A SIGNATURE

To adopt a signature:

- Verify that your name and initials are correct.
- Select a style from the right to use for signatures and initials. This style is used for all signatures and initials in the document.
- Finally, click **Adopt your Signature** to save the information.

DRAWING A SIGNATURE

Depending on your browser, you may be able to draw your signature using various tools. After clicking **Draw** the signature styles are replaced with blocks for adding a signature and initials. This option is best with a touch pad or similar drawing device.

- In the **Draw your signature** and **Draw your Initials** blocks draw your signature/initials using your finger or stylus (for a touch-screen) or mouse.
- If you make a mistake, click **Try Again** to reset the block.
- Click **Adopt my Signature** to save your name, initial, and signature style and return to the document.
- You can return to the pre-set signature styles by clicking **Select a Signature Style**.

COMPLETING THE SIGNING PROCESS

When you have completed signing and initialing all of the required fields in the envelope, the indicator arrow changes to the box shown.

Take this time to review the envelope for errors and make any changes as necessary. After you are done reviewing the document, click the **Confirm Signing** indicator.

Your information is saved and a message window stating you have completed the documents is displayed.

You are given the option of downloading a PDF copy of the documents or printing a copy of the documents.
SUPPORT

The Research Systems department of RAS is available to receive any questions or comments regarding DocuSign®. Please feel free to contact any of us at any time. You may call us at (202) 806-4759 or email us using the information below:

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