

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.

Request Access

Request access by emailing docusign@ucla.edu.

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:

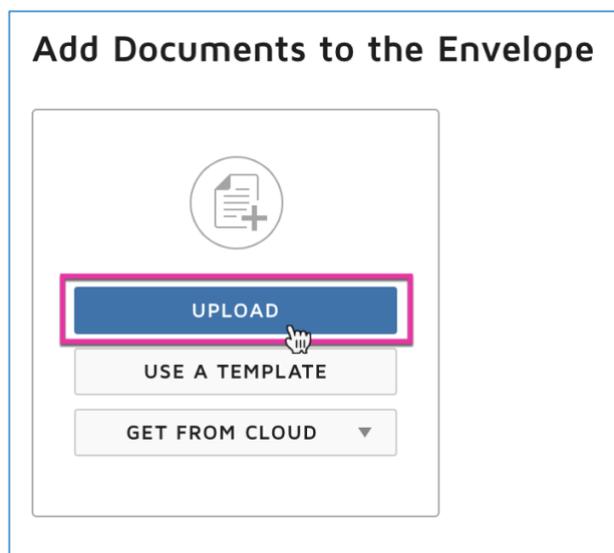
- Add documents to an envelope
- Add recipients to the envelope
- Message all recipients

Add Documents to an Envelope

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



3. Click on **Upload**:



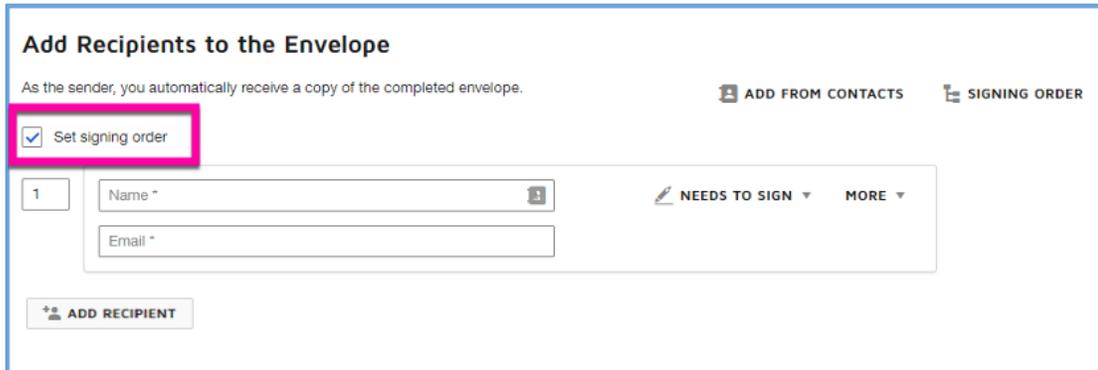
4. Browse and locate the document, then select **Open** from your desktop file browser window
5. Your document is uploaded and displays to the left

Add Recipients to the Envelope

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

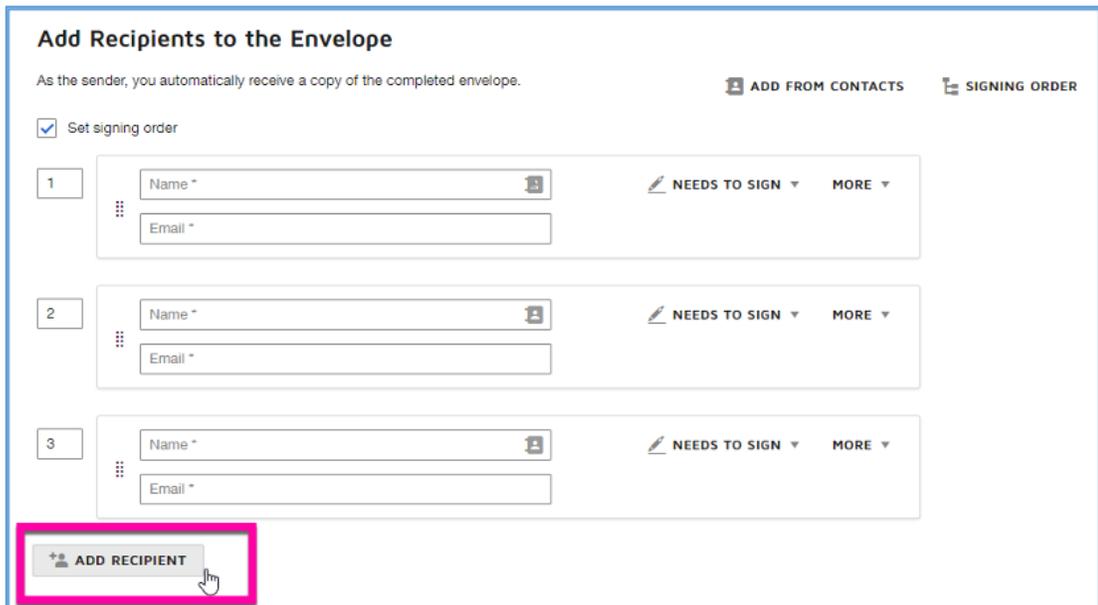
Set Signing Order & Add Names and Emails

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 them is a checkbox labeled 'Set signing order', which 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 left, there is an 'ADD RECIPIENT' button.

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



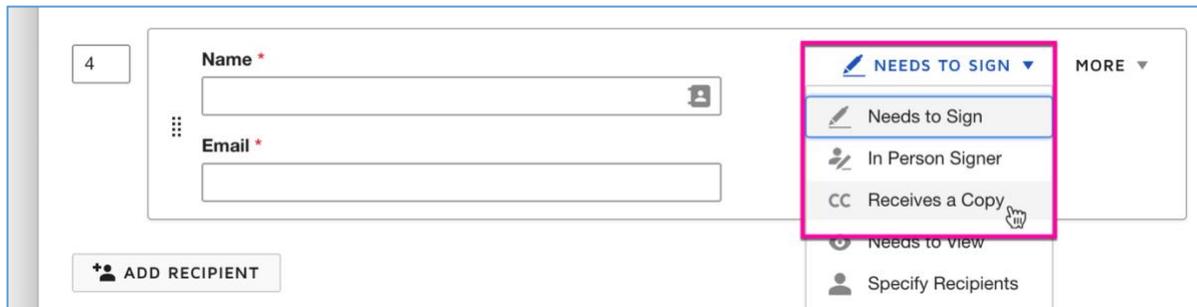
The screenshot shows the 'Add Recipients to the Envelope' interface with three recipient entries. Each entry has a number in a box (1, 2, and 3), a 'Name *' field, an 'Email *' field, and buttons for 'NEEDS TO SIGN' and 'MORE'. The 'Set signing order' checkbox is checked. At the bottom left, the 'ADD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

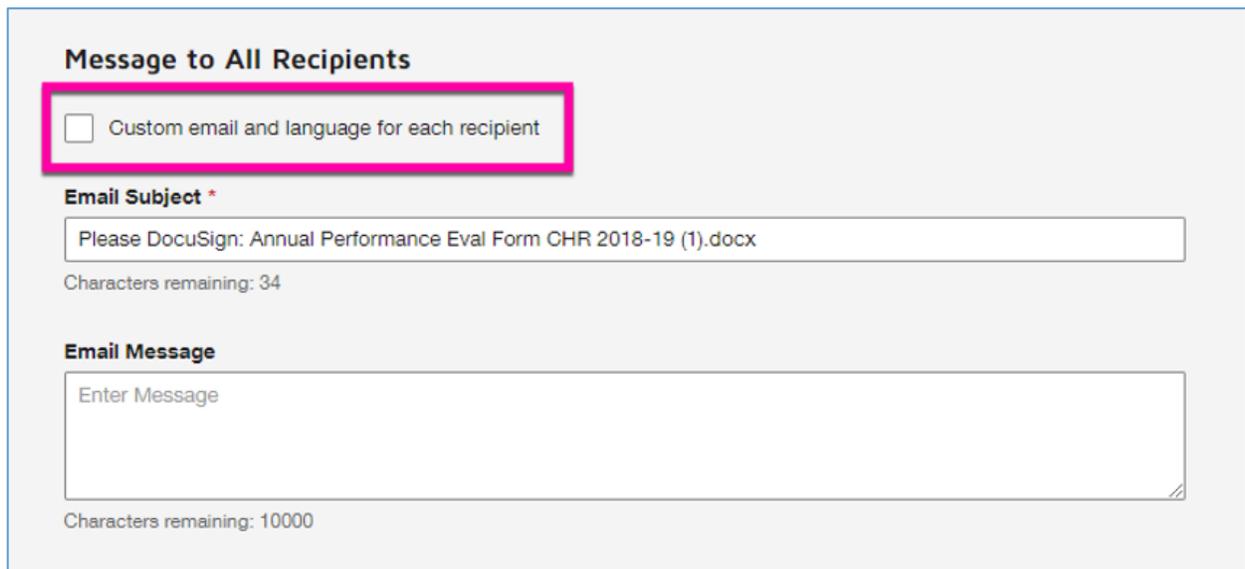


The screenshot shows a recipient management interface. On the left, there is a form with a 'Name' field and an 'Email' field, both marked with an asterisk. Below the form is an 'ADD RECIPIENT' button. On the right, there is a dropdown menu titled 'NEEDS TO SIGN' with a 'MORE' option. The dropdown menu is open, showing several options: '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, and a mouse cursor is pointing at it.

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' form. At the top, there is a checkbox labeled 'Custom email and language for each recipient', which is highlighted with a pink box. Below the checkbox, there is an 'Email Subject' field with the text 'Please DocuSign: Annual Performance Eval Form CHR 2018-19 (1).docx' and a character count of 'Characters remaining: 34'. Below the subject field, there is an 'Email Message' field with the placeholder text 'Enter Message' and a character count of 'Characters remaining: 10000'.

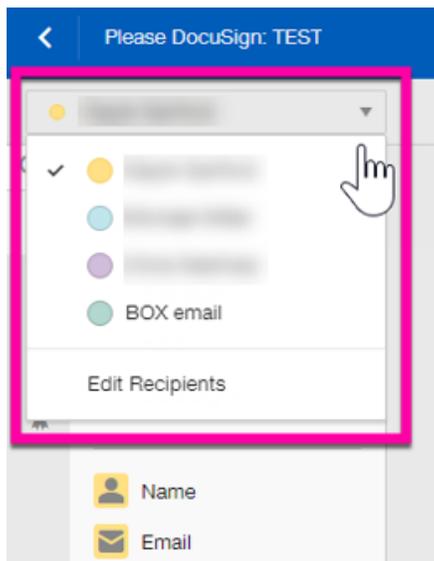
Assign Signature Fields

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 _____

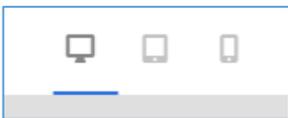
EMPLOYEE'S COMMENTS

Preview the Envelope

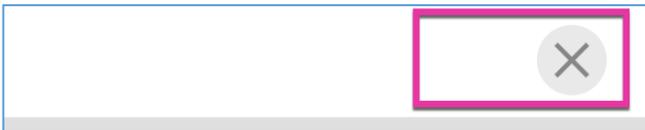
1. Click on **Recipient Preview** for a preview:



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:

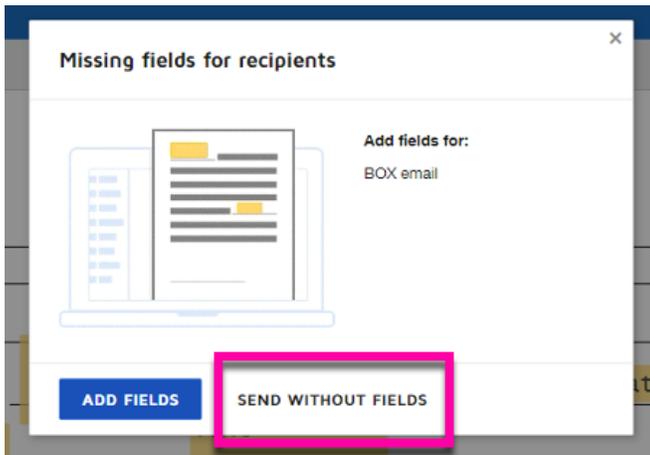


Send the Envelope

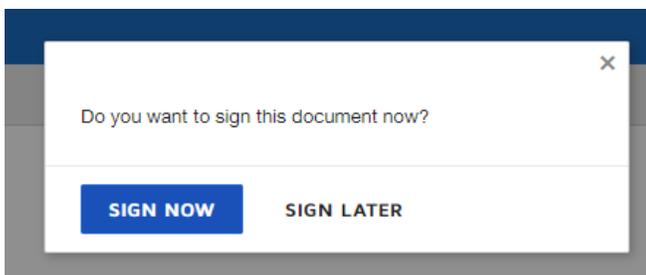
- Sending the envelope triggers an automated workflow determined by signature order; for example, the first recipient has to sign the document in order for the second recipient to receive an email notification, and so on...
 - Everyone will receive an email with a copy of the document when all signatures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



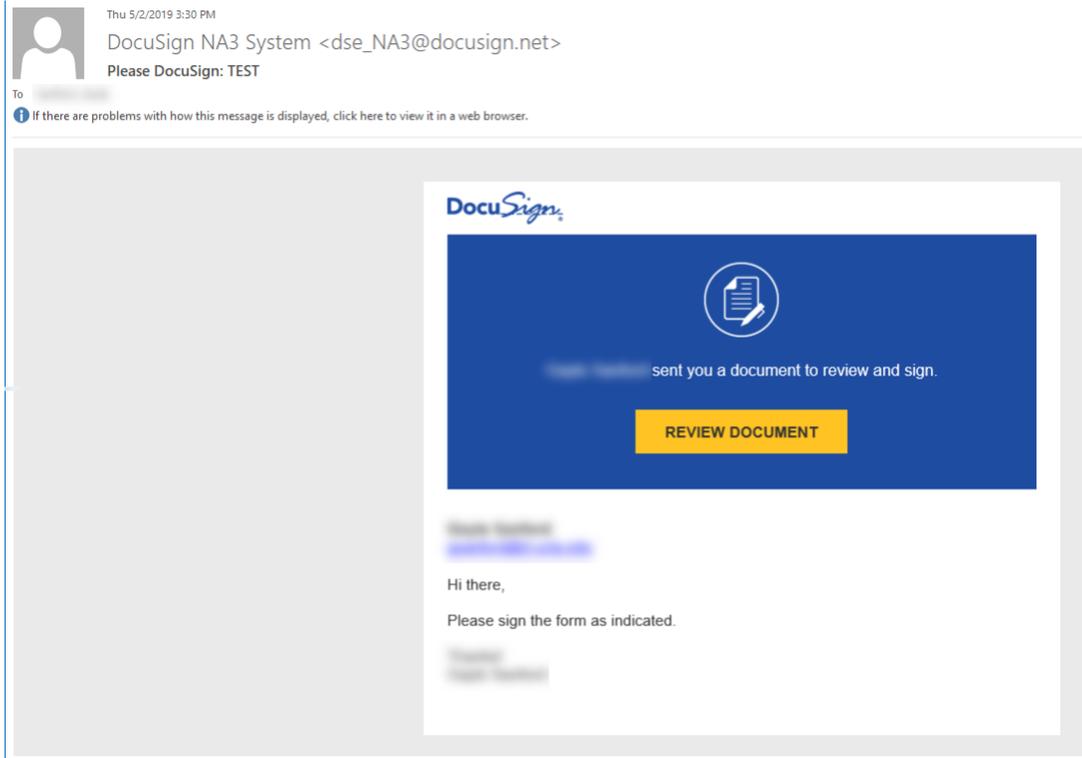
2. If you included the Box Email as a recipient, you'll receive this pop-up indicating that there are missing fields. Click on **Send without Fields**:



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:

This site uses cookies, some of which are required for the operation of the site. [Learn More](#) OK

Please Review & Act on These Documents DocuSign

Gayle Sanford
Internet2 CBO University of California, Los Angeles

Hi there,
[Please Review & Act on These Documents](#)
[View More](#)

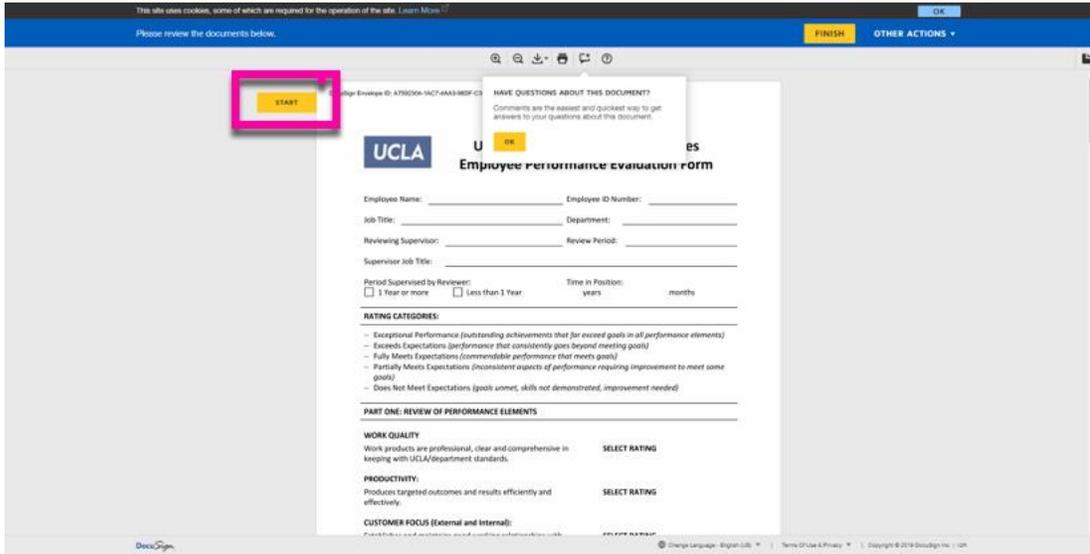
Please review the documents below. CONTINUE OTHER ACTIONS

DocuSign Envelope ID: A750204-1AC7-4AA3-98DF-C33AF0004EE

UCLA **University of California, Los Angeles**
Employee Performance Evaluation Form

Employee Name: _____ Employee ID Number: _____
Job Title: _____ Department: _____
Reviewing Supervisor: _____ Review Period: _____
Supervisor Job Title: _____
Period Supervised by Reviewer: 1 Year or more Less than 1 Year Time in Position: _____ years _____ months
RATING CATEGORIES: _____

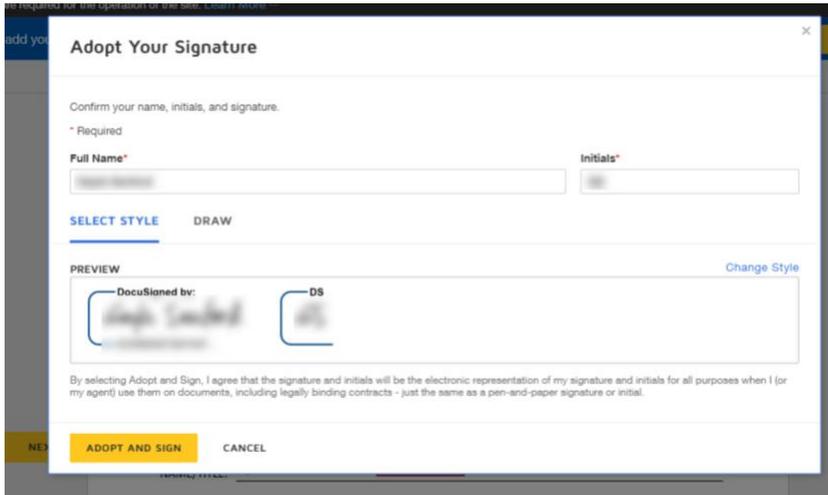
2. Click **Start**:



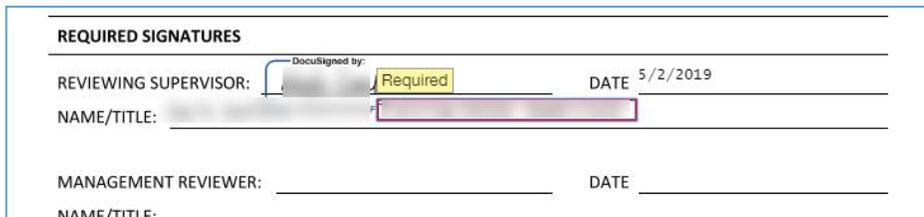
3. This takes you to the **Required Signatures** tab of the document:

A screenshot of the "Required Signatures" tab of the document. On the left side, there is a vertical grey bar with a yellow "NEXT" button. The main content area is white and contains the following elements: a large empty rectangular box at the top; a section titled "REQUIRED SIGNATURES" with a yellow "Required - Sign Here" button; a "REVIEWING SUPERVISOR:" field with a yellow "Sign" button and a red arrow pointing down, followed by a "DATE" field containing "5/2/2019"; a "NAME/TITLE:" field with a red rectangular box; a "MANAGEMENT REVIEWER:" field with a "DATE" field; a statement: "I have received and reviewed this evaluation of my performance. My signature below indicates neither agreement nor disagreement with this evaluation."; an "EMPLOYEE:" field with a "DATE" field; and a section titled "EMPLOYEE'S COMMENTS" with a large empty rectangular box below it.

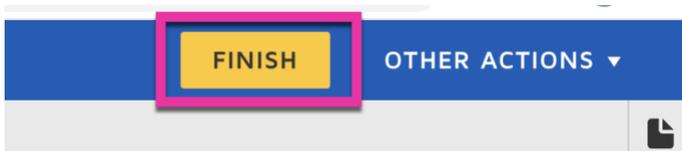
- Click on the **Sign** field icon to **Adopt Your Signature**. Customize your signature as you prefer:



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



- Your **name/title** and **date** auto-fills
- Type your title in the **Required** text field
- 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 'Inbox' page is filtered by 'Date (Last 6 Months)'. A search bar and 'FILTERS' button are present. The main content area shows a table of envelopes:

Subject	Status	Last change
<input type="checkbox"/> Please DocuSign: TEST To: [redacted] +2 more	Waiting for Others	5/2/2019 03:33:09 pm

Below the table, there is a 'RESEND' button and a link to 'Looking for more? | Edit your filters'. The left sidebar includes sections for 'NEW', 'ENVELOPES' (with 'Inbox' selected), 'QUICK VIEWS' (with 'Waiting for Others' selected), and 'FOLDERS'.

This shows you outstanding documents pending review.