

DocuSign

[DocuSign site: https://account.docusign.com/#/username](https://account.docusign.com/#/username) Log in with OSU credentials. Any employee can sign items sent via DocuSign without additional training.

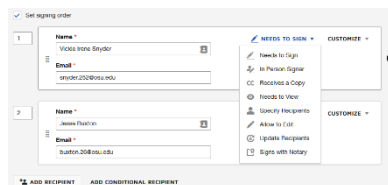
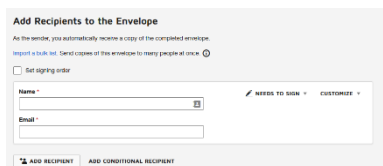


Users need to have DocuSign 'sender access' to be able to request signatures. To request this access, follow this Guide [DOCUSIGN ACCESS REQUEST TUTORIAL](#)

Once access has been granted and you start a document, the site will prompt you to choose if using a template then 'apply' or 'cancel' that window to 'upload' your own file. If templates are already in the system, such as OPERS FORM or Vendor Setup Form, then DocuSign will prompt you to use those files, but they are not filled in so in order to use your own version of these forms, then name your file different from the template and upload.

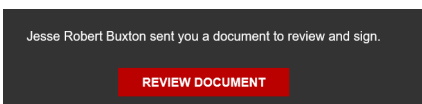


In order to send to those needing to sign, checkmark "Set signing order", put in first person's name and email, then click "Add Recipient" and continue to do so for as many signatures that are required. Note the "Needs to Sign" drop down, this is where you can indicate if they need to actually sign or just receive a copy, etc.

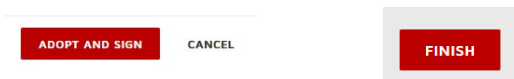
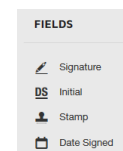


Next up is the email message that will go to all recipients, check the subject line and add an Email Message, then SEND NOW or NEXT button will show the file uploaded, then SEND.

The recipient will receive an email with a link to REVIEW DOCUMENT



Click on 'Signature' in the FIELDS column to location of signature and to sign. Will be prompted to 'Adopt and Sign'



If needing to save and send a certificate then choose "Other Actions" and View Certificate.

