

Accessing and Using DocuSign

The university has access to DocuSign to enable signing documents electronically. All PVAMU employees have access to DocuSign.

Accessing DocuSign:

1. Go to www.docusign.com
2. Click on “**Login**”, located at the upper right-hand side of the screen.



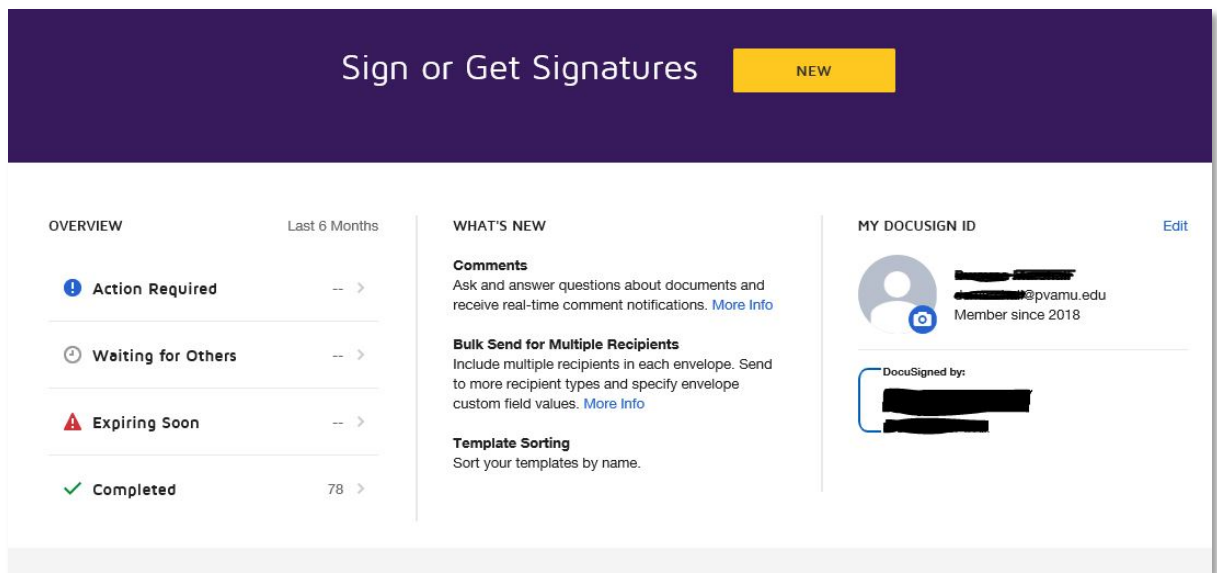
3. You will have to enter your PVAMU email address and click “**Continue.**”

A screenshot of the DocuSign login screen. It features the DocuSign logo at the top, followed by the text 'Please log in to your account'. Below this is a text input field labeled 'Email address'. A yellow button labeled 'CONTINUE' is positioned below the input field. At the bottom, there is a link that says 'No account? Sign up for free'. An arrow points from the 'Continue.' text in the previous step to the 'CONTINUE' button.

4. You will get routed to the PVAMU login screen where you will enter your **username** and **password**. The same information that you use to login to your computer. Click “**Sign In.**”

A screenshot of the PVAMU login screen. It has a purple header with the text 'SIGN IN'. Below the header are two input fields: one for the username (containing a single character 'I') and one for the password. Below the password field is a checkbox labeled 'Remember me on this computer'. A warning message follows: 'Warning! Unauthorized use of this system is prohibited. There can be no expectation of privacy except as provided by privacy laws. Usage may be subject to security testing and monitoring. Misuse is subject to criminal prosecution.' Below the warning is a link that says 'Click here to reset your password'. At the bottom is a black button labeled 'SIGN IN'. Arrows point from the 'Sign In.' text in the previous step to the username input field and the 'SIGN IN' button.

5. You will now see your welcome page.



- **My DocuSign ID** – This is your information including your signature. When you first login you have the option to choose the way your signature will look. Once you select it, then it will become your signature for all future use.
- **Action Required** – This lets you know if you have any documents that need your review and signature.
- **Waiting for Others** – This lets you know the status of any documents that you are involved in with signing. It allows you to track where your documents are at any time.
- **Expiring Soon** – This shows you any documents that you should sign that the time period to sign is expiring.
- **Completed** – This shows you how many documents you have completed.

DocuSign Features:

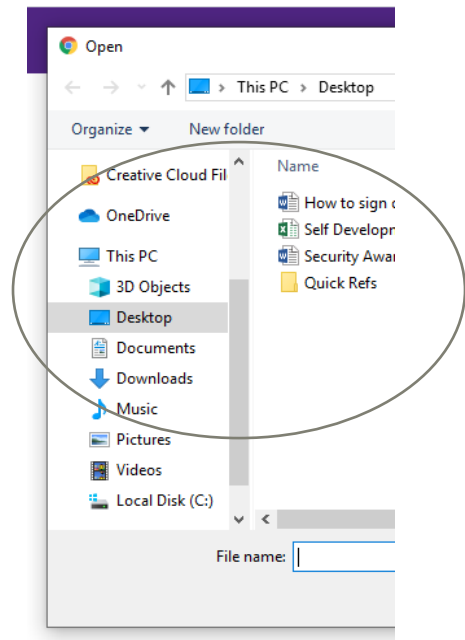
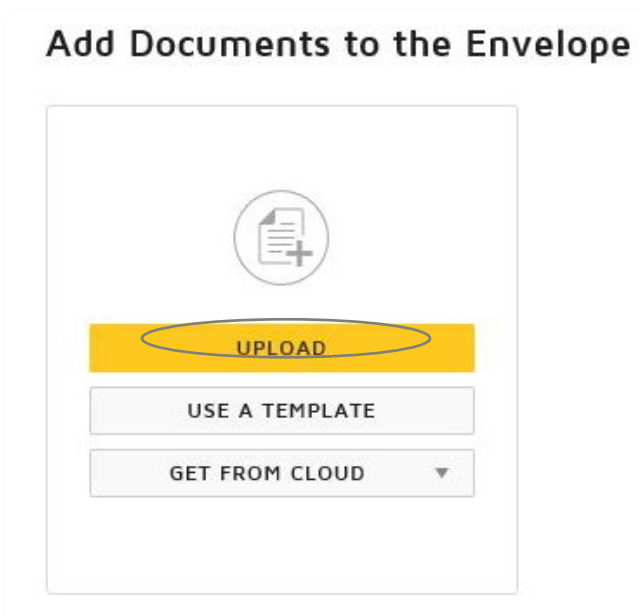
- **Notifications** - The system sends out email notifications when a form has been submitted for review and signature.
- **Resend Option** – This allows you to open a previously submitted document and resend it.
- **Reminder Notifications** – The system sends out reminder emails to the individual notifying them that there is still a document that needs to be completed.

Sending a Form for Signature

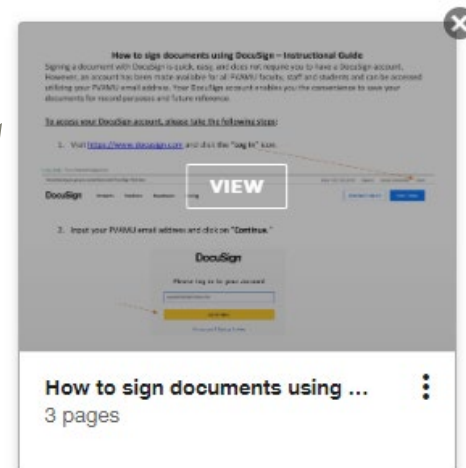
1. When in the welcome page, click on the “**NEW**” button, and select “**Send Envelope**” from the list of options.



2. Once you do this you will be able to upload a document and prepare it for use. Click “**Upload**,” search for your document and upload it. Once uploaded, you will see a preview thumbnail of the document.



3. Once uploaded, you will see a preview thumbnail of the document.



4. To add the document recipient(s) information, take the following actions:

- Input the name and email of recipient(s) for the document.
- Select the type of action for the recipient. By default the option is **“Needs To Sign”**, and this is perfectly fine. You do have the option of changing the role and the next most common role is to select **“Receives a Copy.”** This option sends the person a copy of the completed document and they don’t need to sign and won’t hold up the process.
- If multiple recipients are required, click “Add Recipient” and input the applicable information for the recipient.

Add Recipients to the Envelope

As the sender, you automatically receive a copy of the completed envelope.

[Import a bulk list.](#) Send copies of this envelope to many people at once. ⓘ

☐ Set signing order

The screenshot shows the 'Add Recipients to the Envelope' form. The 'Name' and 'Email' fields are circled. The 'ADD RECIPIENT' button is circled. The 'NEEDS TO SIGN' dropdown menu is open, showing options: Needs to Sign, In Person Signer, Receives a Copy, Needs to View, Specify Recipients, Allow to Edit, and Update Recipients. The 'NEEDS TO SIGN' option is circled.

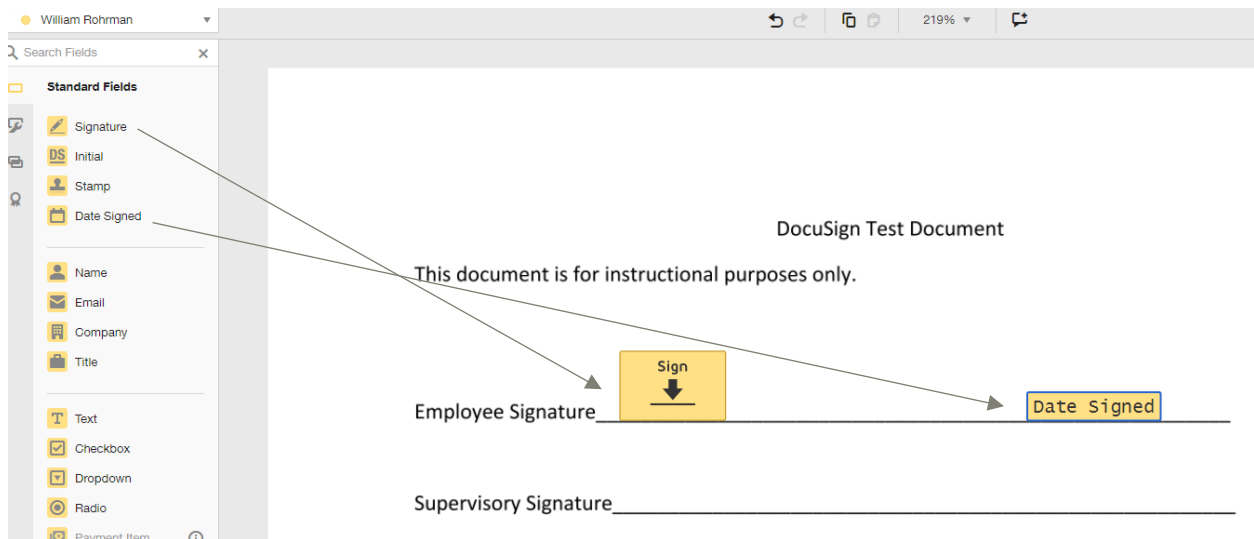
5. Once all recipient(s) information is completed, click the “Set Signing Order” box. DocuSign will a number to display the routing order. Review the signing order, and if need be, simply correct the number sequence to route according to your desire.

The screenshot shows the 'Set signing order' section. The 'Set signing' checkbox is checked and circled. Below it, two boxes labeled '1' and '2' are shown, with arrows indicating a sequence. The 'ADD RECIPIENT' button is visible at the bottom.

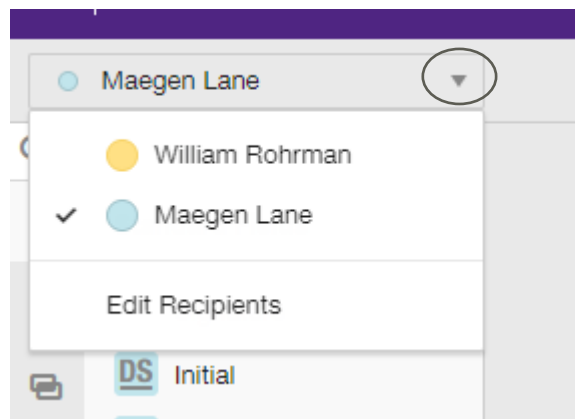
6. Once you reviewed and ensured your desired routing order, simply click on “**Next**” at the bottom right hand corner of the screen.

NEXT

7. Your Document will then be displayed to enable adding the desired Standard Fields to your document.
 - To affix a standard field onto your document, click on the desired data element, drag it onto your document, and place it in your desired location. Repeat the drag and place action for all additional data elements, if required.

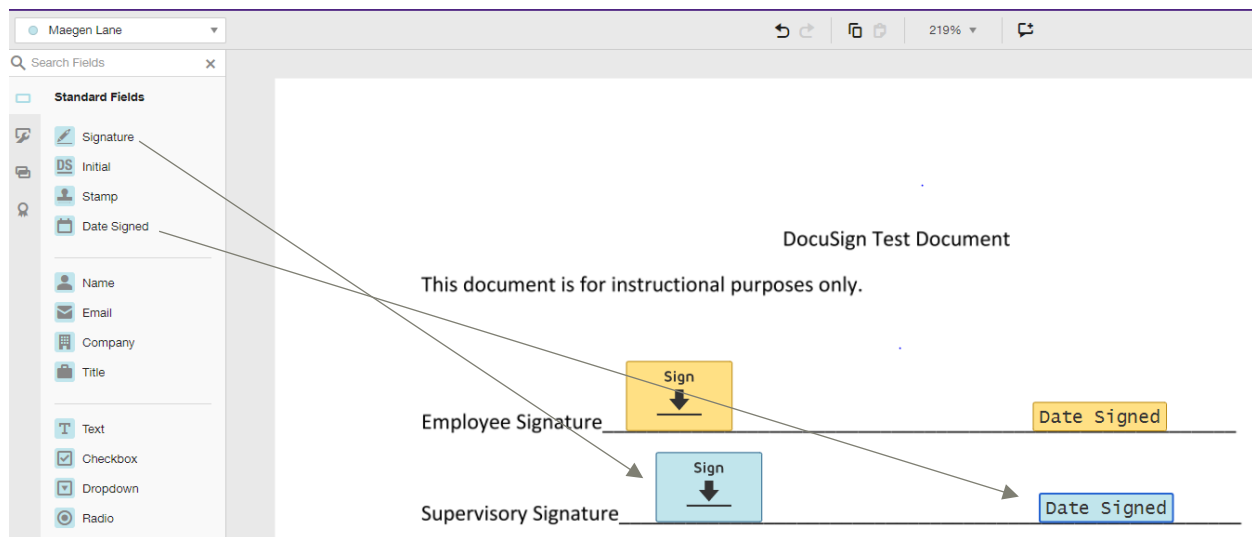


- To affix a standard fields onto your document for additional recipients, you must first click on the drop down box at the top left hand side of the screen to select the new recipient.



- Once selected you will notice that color code for the recipient and respective standard fields will change color. This is done to differentiate between recipients information. To affix your desired

data elements, click on the desired data element, drag it onto your document, and place it in your desired location. Repeat the drag and place action for all additional data elements, if required.



8. Once you have affixed all desired data fields onto your document, click on **“SEND”** at the bottom right hand corner of the screen to send your document for review and signature.



9. All recipients will receive an email notification to inform them that a document has been routed to them for review and action. The email notification will display the following subject: **“Please DocuSign: (The name of the form).”**
10. Once document has been routed for action, click on the **“Manage”** tab to monitor the completion status of your document. Email notifications will be automatically sent after each required action has been completed the respective recipient.

