

Uploading Document to DocuSign for Signatures

If you have to submit documents for signatures, you can complete them and upload them to DocuSign for signatures. DocuSign is a more efficient way of signing documents and submitting them to the appropriate individual. This handout provides instructions on how to use DocuSign to complete this.

Accessing the Document

Before creating the document in DocuSign, you will need to locate the document. More than likely you have been provided with this document from your supervisor, HR, etc.

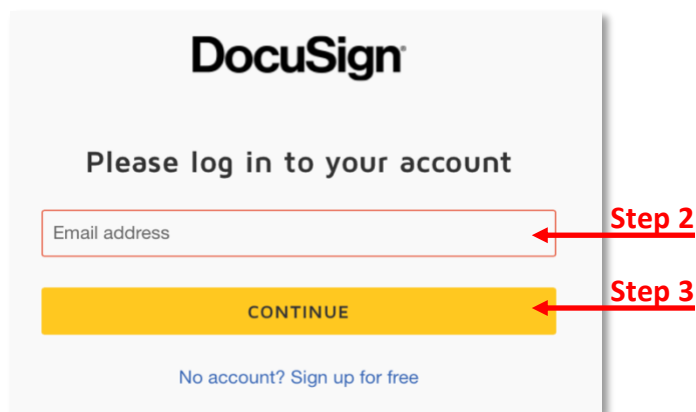
Once you have located the document, make sure you to completely fill it out (excluding the signature and date). You will upload the completed document to DocuSign for signatures and the dates.

Logging into DocuSign

After you have filled out the document, you will proceed to upload it into DocuSign.

1. Open the Internet browser and go to <https://account.docusign.com/>.
2. Enter your USF email address.
Note: You can only use your USF email address. You cannot use a personal email.
3. Click **Continue**.
4. Follow the onscreen prompts to login to DocuSign using your USF NetID and NetID password.

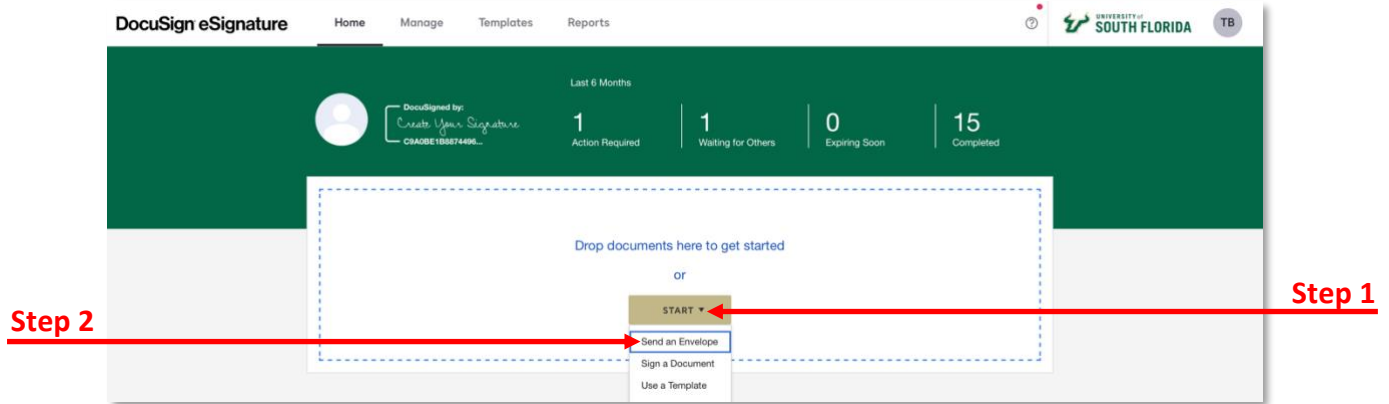
Note: You will be redirected to the DocuSign Web Application screen once you have logged in successfully.



Uploading your Completed Document

Before uploading the document, make sure you have completely filled it out. The only fields that should be blank are the signature and date.

1. On the DocuSign Web Application, click **Start**.
2. Click **Send an Envelope**.



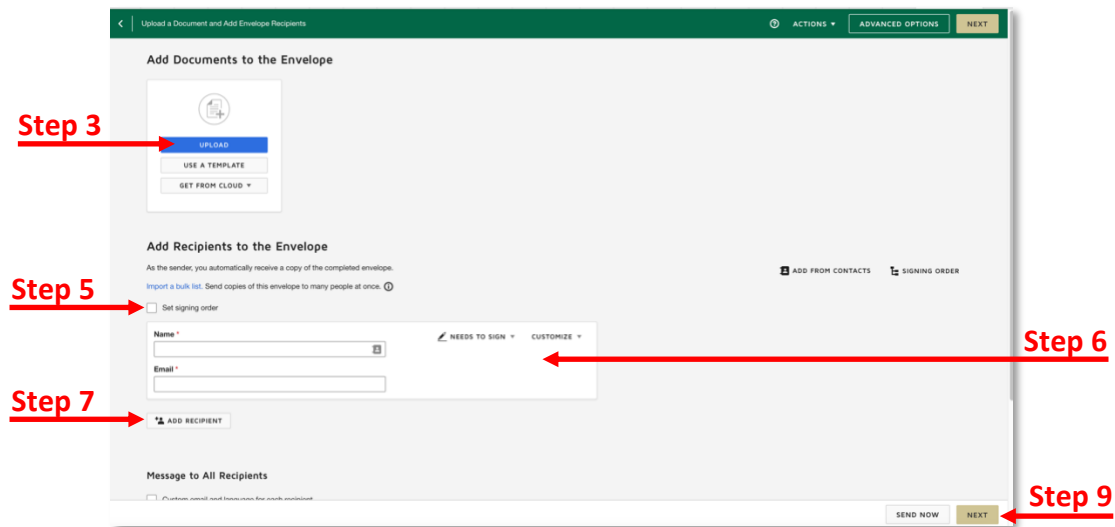
3. Click **Upload** to upload the document you want to sign.
4. Follow the onscreen prompt to upload your completed document.
5. Click **Set signing order**.

Note: This is because there are multiple individuals signing the document and this controls the order in which your recipients receive and sign your documents.

6. Enter the recipients' information in the order they must sign it.

Note: You must include all recipients who will need to sign and ultimately receive the document.

7. You will have to click **Add Recipient** to add additional recipients.
8. Enter a message for the recipient (optional).
9. Click **Next**.

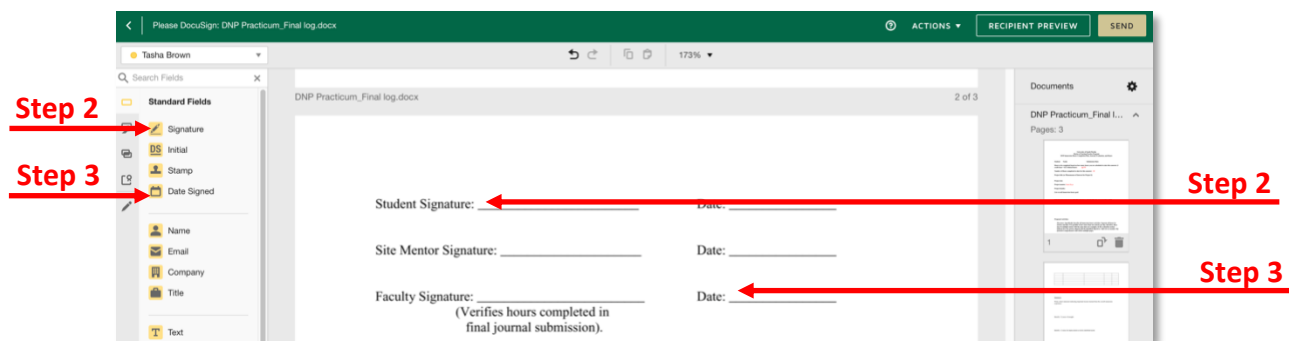


Adding the Signature and Date Fields to Your Document

After you have uploaded your completed document, you can add the signature and date fields to it. The fields are necessary for everyone, including yourself, to sign it.

1. Scroll down to the Signature area in the document.

2. From the *Standards Fields*, menu, click **Signature** and drag it to where an individual will sign his/her name.
3. From the *Standards Fields*, menu, click **Date Signed** and drag it to where the date will appear.
4. Repeat these steps to add a *Signature* and *Date Signed* field for all required signatures.



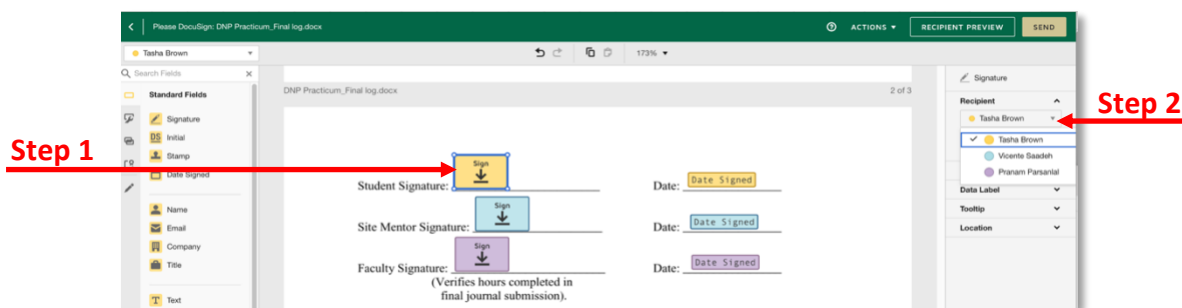
Assigning the Signature and Date Fields

After you have added the signature and date fields, you will need to indicate who signs where and the corresponding date for that individual.

1. Select the first *signature* field.
2. From the right-hand menu, click the *Recipient* down arrow.
3. Select the name of the individual who will need to sign the document first.
4. Select the first *date* field.
5. From the right-hand menu, click the *Recipient* down arrow.
6. Select the name of the individual who corresponds to the signature (for the date).

Note: You will notice that each field will be color coordinated to each individual.

7. Repeat these steps to identify who is to sign each field along with his/her corresponding date.
8. Click **Send** in the top right or bottom right.



Signing the Document

Since you are first, you will be prompted to sign the document.

1. Click **Sign Now**.

2. Follow the onscreen prompts to sign the document.
3. Click **Finish** once you have signed the document.

Note: You will receive a pop-up that you're done.

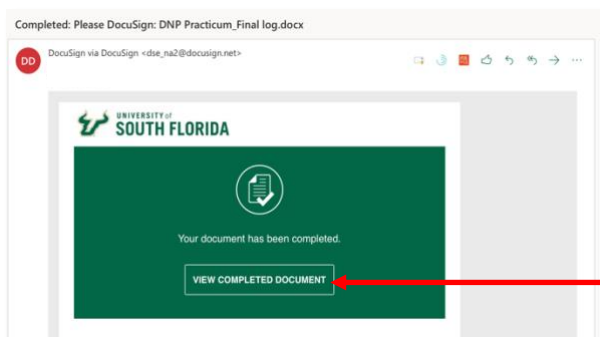
4. Close the window.
5. Notify the next person who is supposed to sign the document that the document should be in their email and ready for them to sign.

Downloading the Document

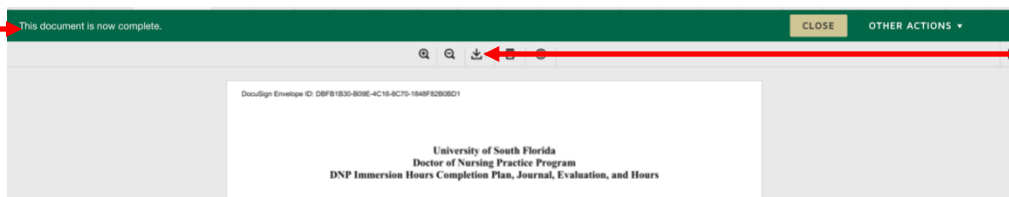
You will be sent an email once the document has been signed by all individuals. If necessary, you may want to download the document for your files. In addition to receiving an email, you can also access DocuSign to locate the signed document.

Downloading the Document from Email

1. Access your USF email and locate the email from DocuSign. The subject will contain "Completed:" at the beginning.
2. Click **View Completed Document**.
3. In DocuSign, you will see a note in the top left corner indicating the document is complete.
4. To download the document, click the download icon and it will save to your computer.



Step 3



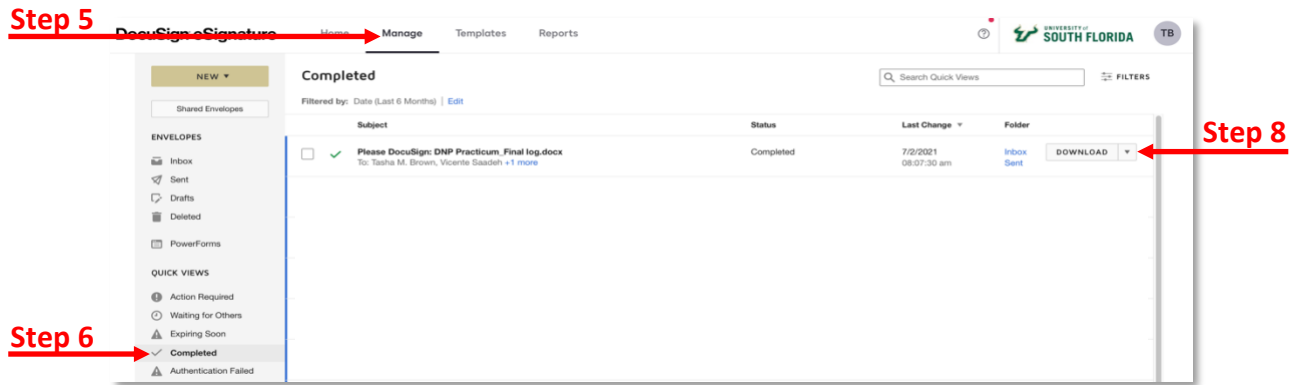
Downloading the Document from DocuSign

1. Open the Internet browser and go to <https://account.docusign.com/>.
2. Enter your USF email address.
3. Click **Continue**.
4. Follow the onscreen prompts to login to DocuSign using your USF NetID and NetID password.
5. Click **Manage**.
6. Click **Completed** from the left-hand menu.

Note: You will see all DocuSign documents you have signed.

7. Locate the signed document from the list.

8. Click **Download**.



9. In the pop-up window, uncheck **All**.

10. Check **Document**.

11. Click **Download** and the document will save to your computer.

