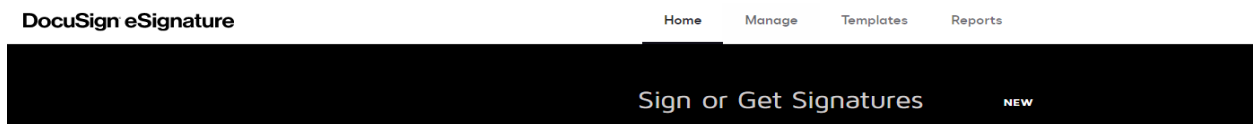




DocuSign Instructions – How to Route a Document for Signature

1. Login to DocuSign (using your UMBC credentials): www.docusign.com
2. Once logged in you should be on the "Homepage" you should see the option to select "New" in the header of the screen, where it says "Sign or Get Signatures":

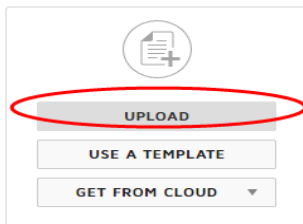


3. Click "New" and then select "Send and Envelope":



4. Click "Upload" and attach the completed document (in this example we will be utilizing the Contingent I contract):

Add Documents to the Envelope



Add Recipients to the Envelope

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

ADD FROM CONTACTS

SIGNING ORDER

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

Set signing order

NEEDS TO SIGN MORE

ADD RECIPIENT

- Under "Add Recipients to the Envelope" click the check box next to "Set Signing Order" *<this step is extremely important, it determines who this will route to and in which order.*

****Note**** once you check this box a small box will appear next to the name field with the number 1, this indicates this is the first signer on the document:

Add Recipients to the Envelope

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

ADD FROM CONTACTS

SIGNING ORDER

[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' interface. At the top, there is a checkbox labeled 'Set signing order' which is checked and circled in red. Below this, there are two recipient boxes. The first box is highlighted with a green box and contains the number '1'. The second box is highlighted with a green box and contains the number '2'. Both boxes have 'Name' and 'Email' fields and a 'NEEDS TO SIGN' dropdown menu. The 'NEEDS TO SIGN' dropdown is highlighted in green in both boxes. Below the recipient boxes, there is an 'ADD RECIPIENT' button.

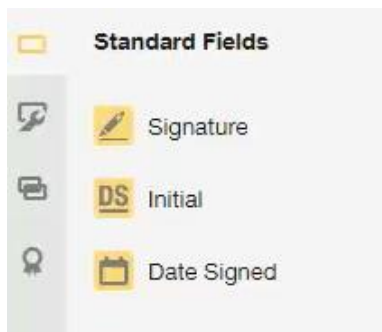
- Enter the **First and Last name** and ensure the drop down reflects "Needs to Sign" Since this is the first signer I would list the person who is the first signature block on the uploaded document (*in this example we are using the Contingent I contract*).
- Enter their **Email Address**
- Click "Add Recipient"** to add the next signer, and **repeat steps 6-7** please note once you add the second signer another box will appear listing the number "2", this indicates this person will be the second signer on the document (*the DocuSign will route to them after the first signer has signed the document*)
- Repeat step 8 for all additional signers**

****Note**** if you want to include someone to receive a copy of the completed DocuSign but they are not required to sign, you can add them as a "CC" by changing the option under the "Needs to Sign" drop down to "Receives a Copy". You can list them in any signing order, but please be aware they will receive the cc at that stage of the process as well as at the very end, I suggest including "cc'd" individuals as the final person in the signing order, so they only receive the finalized document, and are not bombarded with multiple emails while the document is still in progress:

The screenshot shows the 'Add Recipients to the Envelope' interface. At the top, there is a checkbox labeled 'Set signing order' which is checked and circled in red. Below this, there is one recipient box. The box is highlighted with a yellow box and contains the number '2'. The box has 'Name' and 'Email' fields and a dropdown menu. The dropdown menu is set to 'CC RECEIVES A COPY' and is highlighted in yellow. Below the recipient box, there is an 'ADD RECIPIENT' button.

****Note**** You do not have to enter anything under the "Envelope Custom Fields" or the "Message to Recipients" section, I always leave the "Envelope Custom Fields" as the default values, and if you want to send a message to all recipients you can enter the information under that section, but it is not required. If you do not, then the default information listed is what will be sent. **Also note, the "Email Subject" will always default to "Please DocuSign: and then the title of the document you uploaded" unless you edit this field to specify a different subject.**

- Once all signers have been added in the appropriate signing order and you have made any updates to the "Message to All Recipients" section, you should **click "next"** in the upper right corner of the screen or the lower right corner (both take you to the next page).
- On the next page you will select the "Signature" field and drag and drop it onto the uploaded document (in this example we are using the Contingent I contract) in the signature block. You will do the same with the "Date Signed" field:

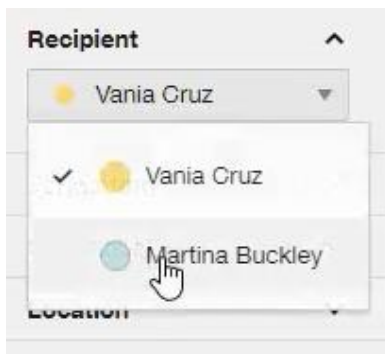


EMPLOYEE SIGNATURE:	Sign	DATE:	Date Signed	
Contact Person (Print Name & Title):	(Signature)	Date	Date Signed	Phone Number
Department Head or Approval Designee (Print Name & Title)	(Signature)	Date	Date Signed	Phone Number
Human Resources Approver (Print Name & Title)	(Signature)	Date		Phone Number

HR USE ONLY -- Background Check: Required Not Required Completed MD State Database Completed

Contingent I Contract.Rev.SJM.01282016

- Once both fields are placed on the uploaded document (in this example we are using the Contingent I contract), you will need to assign who these fields belong to by selecting the name of the person on the right hand side of the screen under "Recipient":



EMPLOYEE SIGNATURE:	Sign	DATE:	Date Signed	
Contact Person (Print Name & Title):	(Signature)	Date	Date Signed	Phone Number
Department Head or Approval Designee (Print Name & Title)	(Signature)	Date	Date Signed	Phone Number
Human Resources Approver (Print Name & Title)	(Signature)	Date		Phone Number

HR USE ONLY -- Background Check: Required Not Required Completed MD State Database Completed

Contingent I Contract.Rev.SJM.01282016

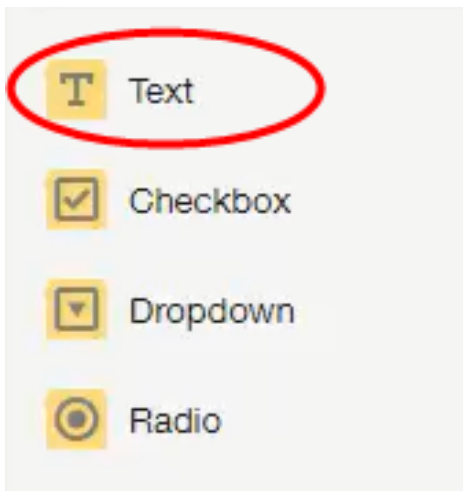
As you can see, each "Recipient" has a colored bullet next to their name. When selecting the recipient you must first select the signature box and then select the recipient from the drop down, the selected box will change to the same color as the recipient selected. You will repeat this same step for the "Date Signed" fields and any other fields you may have added to the document for completion/signature.

- Complete step 12 for all signers. Keep in mind this ties to your signing order, which is why it is important to list the person who will be signing the first signature block on the uploaded document as Signer 1 (in this example we are using the Contingent I contract so the Employee is

set as signer 1, Contact Person as signer 2, Department Head as signer 3), that way Signer 1 will be the first to receive the document for signature, and Signer 2 will receive it after Signer 1 has signed, so on and so forth.

Also note that you may need to adjust the sizes of the signature boxes, and ensure appropriate placement, otherwise once the individual signs, it may not align properly, I suggest ensuring the box is not placed in an area that covers any other text, or crosses into other fields

Also, it is expected that all other fields of the uploaded document (in this example we are using the Contingent I contract) are already completed with the required information, and all you need to add in DocuSign are the signature and date fields. However, if any of the other fields such as the "Print Name & Title" field or "Phone Number" field (in the current Contingent I contract example), are not already completed on the contract you should add "Text" fields to these areas by dragging and dropping them, and assigning the appropriate recipient as you did in steps 11-13:



****PLEASE NOTE: if you are routing an HR/Payroll document such as the Contingent I contract through DocuSign for signature, you should not list anyone under the Human Resources/Human Resources Approver section--HR will complete this section themselves when AAOU SSC submits the documents to them for final processing.**

14. Once all fields have been added and all recipients assigned, you should click "**Send**" in the bottom right corner or top right corner of the screen.
15. This will route the DocuSign based on the signing order you specified.
16. Once all signers have finished, the completed document will be emailed to all parties listed on the DocuSign.
17. You should then submit the completed document to AAOU SSC via RT for processing along with any other supporting documentation.