



Did you send it through DocuSign?

May 18, 2022

10:00 am – 11:00 am



Intro

Danielle Ramirez-King

- HR Specialist – Administrator, Student and Short Term Employees

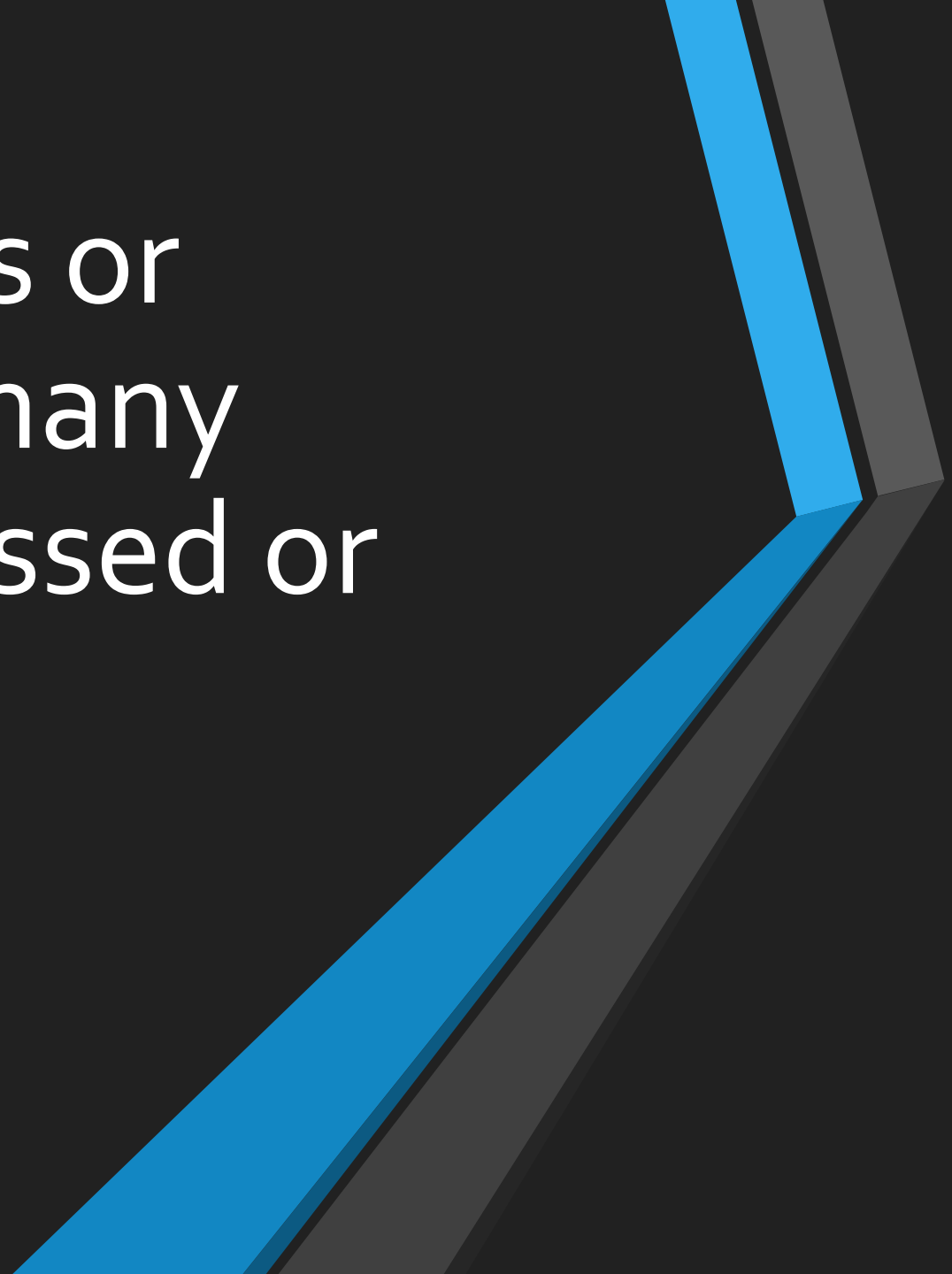
Agenda

- What is DocuSign?
- How to Access DocuSign
- Create Envelopes and Setting Up Signing Orders
- Signing Documents
- Track History and Status
- Creating and Using Templates
- Use it effectively and efficiently!
- Questions

What is DocuSign?

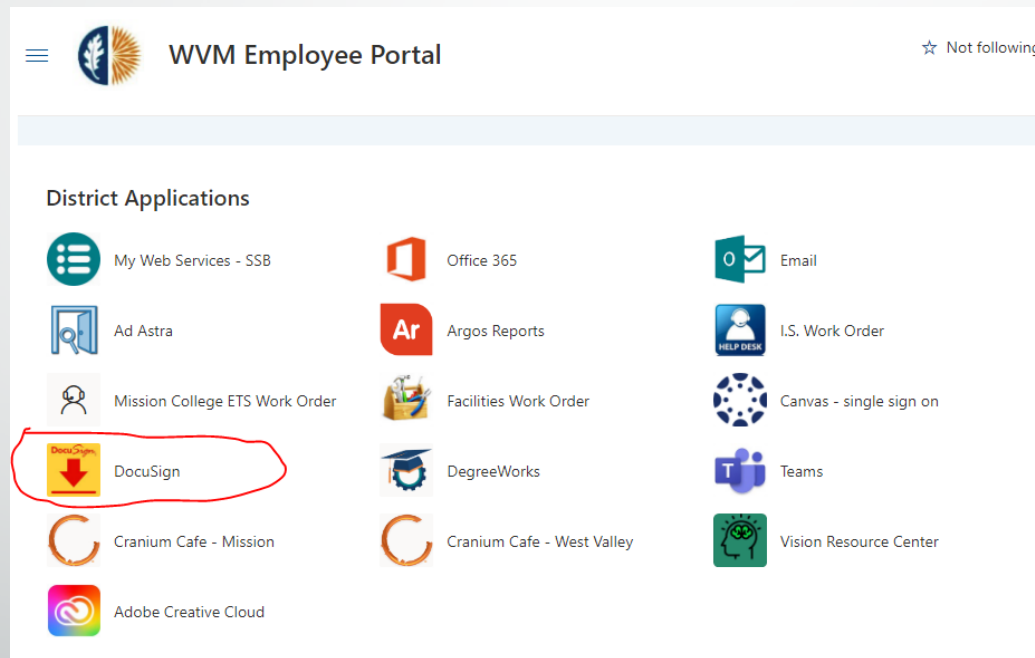
- *Started utilizing it in Fall 2018*
- It's a cloud based e-sign platform available to all in the WVMCCD
- It makes getting an approval or signature easy! *(Especially in our remote, virtual space)*
- Easy uploads and send documents in a many forms (PDF, Word, Excel)
- *DocuSign is also available as a mobile app. Convenience if needed! 😊*

By a raise of hands or thumbs up, how many have already accessed or used DocuSign?



I know what it is. Now how do I access DocuSign?

Login to My Portal. Look for a red and yellow tile with text that says DocuSign. Click it!



You can also login via docusign.com and log in with your College email account and desktop password. (Single sign on)

This is what you see in the DocuSign Platform in a full screen.

The screenshot displays the DocuSign eSignature dashboard. At the top, the navigation bar includes 'DocuSign eSignature', 'Home', 'Manage', 'Templates', and 'Reports'. On the right, there are notification and help icons, the Mission College West Valley College logo, and a user profile picture. The main content area features a dark header with a user profile (Kristal Dela Cruz), a 'Last 6 Months' filter, and a 'Switch to old homepage' link. Below this is a summary of document status: 0 Action Required, 0 Waiting for Others, 0 Expiring Soon, and 14 Completed. A large dashed box prompts the user to 'Drop documents here to get started' with a 'START' button. Three feature cards are shown: 'Automate Envelope Routing', 'Save time with bulk send', and 'Drawing'. The footer contains three sections: 'YOU'RE HELPING US SAVE' (33,592 Lb of carbon), 'WE WANT YOUR FEEDBACK', and 'HELP AND SUPPORT'.

DocuSign eSignature Home Manage Templates Reports

MISSION COLLEGE WEST VALLEY COLLEGE

DocuSigned by:
Kristal Dela Cruz
70CB94145EE54CE...

Last 6 Months Switch to old homepage

0 Action Required 0 Waiting for Others 0 Expiring Soon 14 Completed

Drop documents here to get started
or
START

Automate Envelope Routing
Now you can send to the right people based on predefined routing rules.
[Learn More](#)

Save time with bulk send
No need to send separate envelopes. Import a bulk list and each recipient receives a unique copy.
[Learn More](#)

Drawing
With drawing fields, recipients can upload or draw on images.
[Learn More](#)

YOU'RE HELPING US SAVE
33,592 Lb of carbon
[See your total estimated impact](#)

WE WANT YOUR FEEDBACK
We appreciate your ideas, suggestions, bugs, and even your compliments.
[Give Feedback](#)
Want to be the first one to try out features and give new feedback on the new ideas?

HELP AND SUPPORT
[Support Home](#)
[Community](#)
[Trust Center](#)

Depending on the size of your screen – the menu may be collapsed to three horizontal lines icon. Click to expand.

DocuSign eSignature

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Kristal Dela Cruz

Set/Customize Your Profile

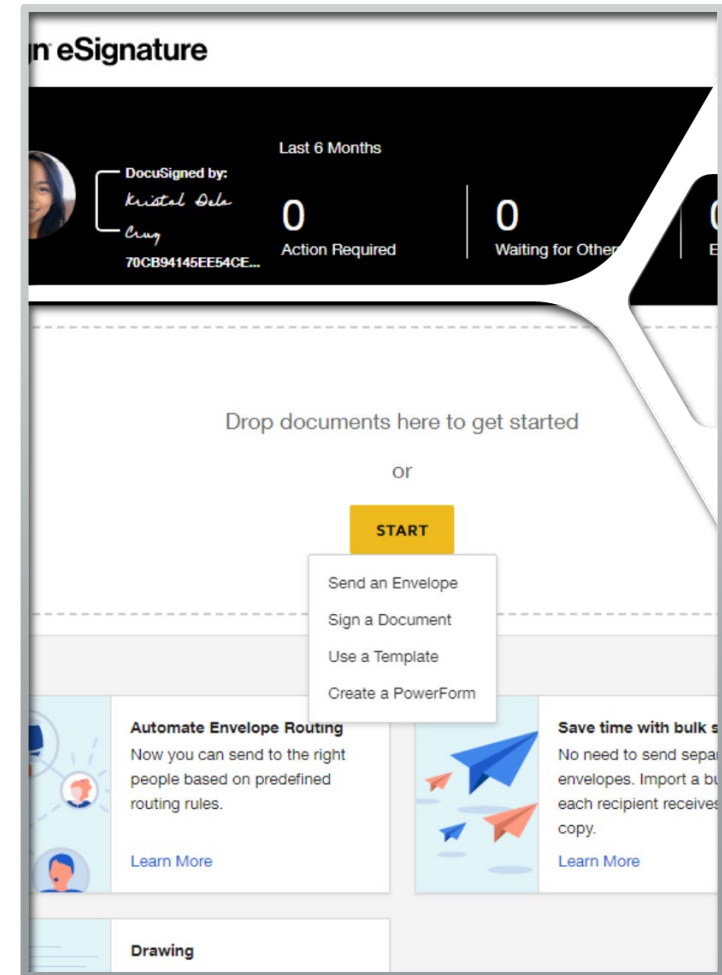
- Go to menu bar, and click on your face/circle icon, and select Manage Profile
- Profile Information – You can update your Name, Company, Title, Address, Phone
- Signature - Create Your Signature/Add New
 - Options: Choose from style sets, Draw, Upload
 - Select and Click Create
- Profile Photo (optional)
 - Click the circle to upload a photo of yourself.
 - Drag and Drop or click Browse to find a photo.
 - Click Done and save

Now you have your profile set, let's START!

You can drag and drop documents to get started OR

Click Start for Options:


- Send an envelope
- Sign a Document
- Use a Template
- Create a PowerForm



Send an Envelope

- This is probably what you will use the most.
- You sending a document to another person(s) for signature.

Add Documents to the Envelope



UPLOAD

USE A TEMPLATE

GET FROM CLOUD ▾

1: Add your documents - You can drag and drop or click the upload button. You can add multiple documents and can drag them in the order you need.

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.

Set signing order

Name *

Email *

ADD RECIPIENT

2: Add Recipients: You can manually type the recipients full name and email address or click on the gray address book to find someone in the address book

You can select the role of the recipient (i.e. sign, view, copy)

Under Customize, you can add a private message to the recipient.

If you have multiple recipients (signers, viewers, CC), and have a particular order to send documents, check this box to set the order. Number will appear at the left side of the name.

NEEDS TO SIGN ▾

CUSTOMIZE ▾

Needs to Sign

In Person Signer

CC Receives a Copy

Needs to View

Specify Recipients

Allow to Edit

Update Recipients

Signs with Notary

Add access code
Enter a code that only you and this recipient know.

Add identity verification
Make sure the right person accesses the envelope.

Add private message
Include a personal note with this recipient.

Required field. This usually auto populates with the title of your document, but you can edit/add the subject line.

You can enter a message that ALL recipients will see.

Message to All Recipients

Email Subject*

Please DocuSign:

Characters remaining: 100

Email Message

Enter Message

Characters remaining: 10000

Advanced Options | [Edit](#)

- Recipients can sign on paper
- Recipients can change signing responsibility
- Incomplete envelopes expire 120 days after send date
- Recipients are warned 0 day(s) before request expires
- Comments are enabled
- Senders can use either quick send or advanced edit

SEND NOW

NEXT

Click NEXT to set the form fields.

This is a drop down list and will show all you recipients with a color coded dot.

These are all the field options.

To put a field on your document, simple DRAG AND DROP into your document.

Name and Email fields will pull the information set from your recipient list.

Search Fields

Standard Fields

- Signature
- Initial
- Stamp
- Date Signed
- Name
- Email
- Company
- Title
- Text
- Checkbox
- Dropdown
- Radio
- Payment Item
- Drawing
- Formula
- Attachment

West Valley - Mission Community College District

DISTRICT FINANCE DEPARTMENT ACCOUNTS PAYABLE CHECK REQUEST FORM

Voucher #: _____ For District Use Only

Requestor: _____ Extension #: _____ Department: _____ Date: _____

PURPOSE (reference guidelines below)	AMOUNT
TOTAL	\$0.00

PAYABLE TO

Name: _____
 Address line 1: _____
 Address line 2: _____
 City, State, Zip Code: _____
 Email: _____

Pay to Bank (IE & Finance) OR _____

ACCOUNT NUMBER

Fund	Organization	Account	Program	Amount or %

SELECT PAYMENT TYPE

Check (Please re-enter)
 ACH (ACH from LINK if bank account is not on file with Accounts Payable)

SPECIAL CHECK HANDLING INSTRUCTIONS

Mail Check
 Hold for pick up (AP staff will notify requestor when check is ready.)
 Return check to: _____
 Other: _____

Budget Administrator (Print Name) _____
Budget Administrator Signature _____ **Date** _____
College VP of Administrative Services _____ **Date** _____
 (College only)

GUIDELINES FOR CHECK REQUEST
NO FURNITURE AND/OR FURNITURE PURCHASE

Check Request may be used for the following:
 Employee Reimbursements
 Memberships/Subscriptions
 Pressy Registration, Conference Fees, Airfare Tickets, and Hotel
 Meals and Lodging for Athletic Events and Student Activities

Original itemized receipts and/or appropriate back-up documentation must be included with the check request. Must be complete within 45 days of event invoice.
Revised 4/20/20

Submit paper form to District Finance Office OR electronic form to invoice@wvm.edu

Documents

Check Request Form ...

Pages: 1

1

If you want to preview how the document will appear to your recipients, you click Recipient Preview.

When you are satisfied and completed set up, you are ready to click Send.

That's it – your document has been sent!

- You will receive an email notification when document has been viewed/signed and complete.
- DocuSign stores all your documents that you have sent and that you have signed.
- You can easily check the status of you document within DocuSign (waiting for others, action required, completed).
 - You can also click the Resend and it sends another notification to the recipient.
- If you need to “fix” your DocuSign, there is a “correct” option – this is best used when the document has not been signed by any recipient(s).
 - You can change/replace documents, change recipients, add messages, or add form fields, etc.
 - This save time – no cancelling/voiding envelopes/documents, and you don't need to start all over.

Signing a document

- You will receive an email in your inbox informing you that something is waiting for your signature.
- Click on view document
- Then follow the boxes requiring your attention
- Click Finish (This will complete your section and send on to the next person in line)
- Once the docuSign is completed all signers will receive a completed email with the signed document attached



Quick Mention: Template & Power Forms

Template

* If you have a form that you regularly send you can set it has a template on your account.

* Once you upload the document the system will notice that it looks like your template and set the template to that document.

Effective and Efficient

- Each envelope is a cost to the district. (\$4.00)
- Encourage you to send one envelope, if you are sending to multiple people for signature, please set up the signing order. Also if you need the same person to sign multiple documents put them all in one envelope.
- Save time and cost by sending one envelope! 😊
- (If you work in the same area, take a stretch break and walk over the document and get an inked signature)

THANK YOU

- There are many features on DocuSign that I didn't get cover, so If you have any questions on DocuSign and want to learn more, their website has many mini videos that are very helpful.



QUESTIONS?