



Use Guide for Signing Documents

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Welcome to DocuSign for Signers

Imagine doing business with any campus department or individual, anywhere and at any time, without the need to print, sign, scan, or email back and forth multiple times. Now imagine the number of resources which can be saved by doing business electronically. Introducing DocuSign at UCSC!

DocuSign is a self-service tool that allows members of the campus to create and route electronic documents for signatures. All DocuSign forms sent to recipients with an @ucsc.edu email address will require the user to login with their CruzID.

The Benefits of Using DocuSign

- More secure than paper documents.
- Complete audit trail of signatures.
- No faxing, scanning or copies needed.
- Reduce paperwork error rates and rework.
- Saves time, money, and resources.
- Speed up and close the task faster.
- Use it from any smartphone or device, anywhere, anytime.
- Sign, send and receive documents in minutes by dragging and dropping your own signature into documents with a few clicks or swipes.
- Never misplace or be without an important document again since all transactions are automatically organized in the cloud.

DocuSign Guiding Principles

- **Contracts:** All contract signatures at UCSC are subject to the University's policies. Please ensure that people added as signers to the routing are operating within their designated signatory authorization for contracts and agreements.
- **Form Ownership:** Each campus form (and associated process) is managed by a campus office. All staff, faculty, and students have the ability to sign documents through DocuSign using University credentials to access Single-Sign-On service.
- DocuSign has been approved for internal routing and legally-binding electronic signature collection.
- Access to UCSC's DocuSign account is made through the University's Single Sign-On (SSO) service. Use of the University's DocuSign tool should be limited to University business and operations.
- Individual's personal business and matters should not be conducted utilizing the University DocuSign account.
- Any employee who is authorized to sign an agreement on behalf of the University and signs via DocuSign must sign the agreement using their CruzID @ucsc email address and have their signature authenticated into the system. An employee signature that does not employ this method at the time of signature may not be binding. Email aliases are not supported. Signers are requested to notify senders of their primary UCSC email address.
- An employee signer is prohibited from delegating signing authority via DocuSign to those who are not otherwise authorized delegated signatories.

- Employees, including student employees, are required to sign with DocuSign when sent documents for electronic signature transactions to conduct University business.
- Individuals, including students, and external parties not affiliated with or employed by the University, are asked to utilize DocuSign for electronic signature transactions when sent documents to conduct business with the University through DocuSign, unless the University or the external party opts out of conducting such transaction electronically. See opt-out procedures below.
- All employee signers are required to read the ELECTRONIC RECORD AND SIGNATURE DISCLOSURE found in the DocuSign account under “PREFERENCES” or under the “MORE” tab prior to signing.

It is important to remember that DocuSign is not a system of record retention. All documents are purged every 90 days. An employee executing a document via DocuSign is responsible for maintaining the fully-executed document, including all attachments, and the certificate of completion (CoC), in a manner consistent with the University’s Record Retention Policy and their own departmental requirements. The certificate of completion is called the Summary.pdf when downloading a document.

For the review of Acceptable Uses and Guiding Principles of DocuSign, please visit:

[Acceptable Uses and Guiding Principles](#)

DocuSign Terminology

- **Envelope** is a DocuSign transaction that is comprised of the documents you send for signature, and the recipient and other information that you associate with it.
- **Initiator** is the individual who initiates and sets up the DocuSign transaction.
- **Locate Template**
 - Action Required: envelopes awaiting your actions, which you need to either sign or view.
 - Waiting for Others: envelopes sent by you that are waiting for others to act on, wither to sign or to view.
 - Expiring Soon: in process envelopes that are due to expire within six days.
 - Completed: envelopes with the status Completed, either sent or received.
- **Recipient** is an individual who will receive and / or sign the document.
- **Recipient Actions Options**
 - Needs to Sign: recipient must complete the required fields assigned to them, such as signature, initial, date.
 - Receives a Copy: recipient receives a copy with no further action needed.
 - Needs to view: recipient must open and view document.
- **Signing Order**
 - Singing Order: allows sender to control the order in which recipients receive and sign documents.
 - Sequential Routing Order: each recipient receives the email notification once the previous recipient has completed their action.
 - Parallel Routing Order: when Set Signing Order feature is disabled.

- **Template** is a commonly used document that is ready to send out using DocuSign.

Signing Documents with DocuSign

When someone sends you a DocuSign document for your electronic signature, you'll receive an email from DocuSign sent on behalf of the sender.

An important note regarding phishing emails:

Since the practice is to receive an email alerting you to DocuSign activity, we all must remain vigilant when it comes to email scams.

Phishing is the fraudulent practice of sending emails to entice individuals into revealing personal information, such as passwords and credit card numbers.

When you receive a DocuSign notification, check the **From** address. Hover your mouse over the sender email and check the email address. All DocuSign notifications will come from dse_na2@docusign.net. When you have confirmed that this is the email address, you can proceed with signing the document.

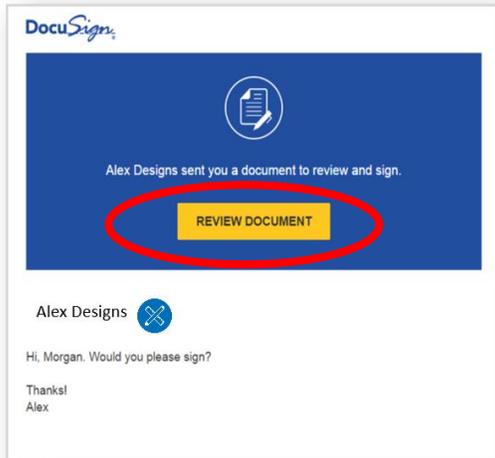


Here are some tips to help spot the differences between real and spoof DocuSign email messages:

- All URLs to view or sign DocuSign documents will contain "docusign.net/" and will always start with https.
- All legitimate DocuSign envelopes include a unique security code at the bottom of the notification emails. If you don't see this code, then don't click on any links or open any attachments within the email message. Forward it to spam@docusign.com

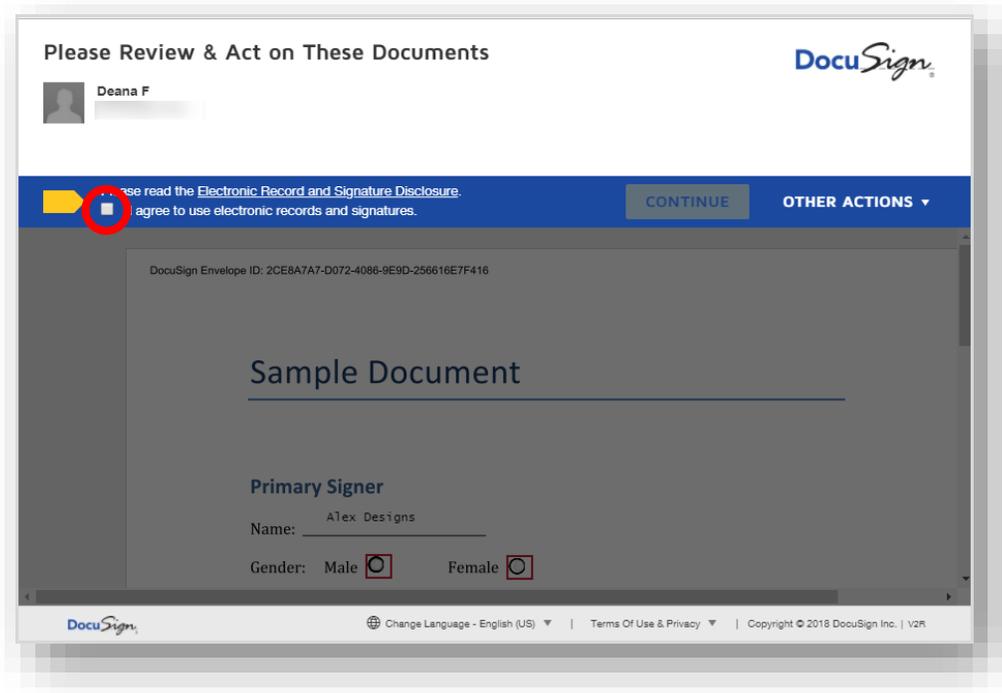
Step 1: Review the DocuSign email

Open the email and review the message from the sender. Click **REVIEW DOCUMENT** to begin the signing process.



Step 2: Agree to sign electronically

1. Review the consumer disclosure, and select the checkbox **I agree to use Electronic Records and Signatures.**
2. Click **CONTINUE** to begin the signing process.



Important! To view and sign the documents, you must agree to conduct business electronically.

3. After you have reviewed the Electronics Records and Signatures agreement and agree to do business electronically, you'll be directed to your inbox.
4. Click **Sign**.

Step 3: Start the signing process

1. Click the **START** tag on the left to begin the signing process.

DocuSign Envelope ID: 208084EA-6560-4521-9E4A-1C6D64242DB4

University of California, Santa Cruz Office of the Registrar

Petition to Withdraw from a Course

Complete and sign this form through DocuSign to withdraw from a course with either a Withdraw (W) or a No Pass (NP) grade.

- To withdraw from the university (withdraw from all of your courses), follow the online procedures for Withdrawal and Leave of Absence (<https://advising.ucsc.edu/procedures/time-off/index.html>).
- Petitions from students with a F1 and J1 visas will be forwarded to International Students and Scholar Services (ISSS) advisers for approval.
- Both the W and NP grades appear on your transcript, are not calculated in your GPA, and may NOT be rescinded.
- Receiving a W or NP grade may impact your progress (<https://advising.ucsc.edu/procedures/withdrawclass.html>).

Deadlines (Quarterly dates may be found in the Academic and Administrative Calendar.)
First Deadline, week six: a W grade is posted to your record when this form is submitted between 10/17 – 11/6/2019.
Final Deadline, week nine: a NP grade is posted to your record when this form is submitted between 11/7 – 11/27/2019. Note: you may request a Petition to Withdraw from a Course in an Emergency through your College Advising Office after the first deadline. Documentation is required.

Student Name:
Chad Hannah

Student ID: _____

2. You'll be directed to the first tag requiring your action.

• Receiving a W or NP grade may impact your progress (<https://advising.ucsc.edu/procedures/withdrawclass.html>).

Deadlines (Quarterly dates may be found in the Academic and Administrative Calendar.)
First Deadline, week six: a W grade is posted to your record when this form is submitted between 10/17 – 11/6/2019.
Final Deadline, week nine: a NP grade is posted to your record when this form is submitted between 11/7 – 11/27/2019. Note: you may request a Petition to Withdraw from a Course in an Emergency through your College Advising Office after the first deadline. Documentation is required.

Student Name:
Chad Hannah

Required - Number - Enter Student ID

Quarter:
Fall 2019

College:
- select -

Course Information
Class Number (e.g., 24199):

3. Click the SIGN tag. You may be asked to Adopt Your Signature and Sign.

Adopt Your Signature

Confirm your name, initials, and signature.

Full Name Michael P **Initials** MP

Select Style Draw

Preview

DocuSigned by:
Michael P
02367A3E9D33485...

DS
MP Change Style

By clicking Adopt and Sign, I agree that the signature and initials will be the electronic representation of my signature and initials for all purposes when I (or my agent) use them on documents, including legally binding contracts - just the same as a pen-and-paper signature or initial.

ADOPT AND SIGN CANCEL

These steps are only for the first time you use DocuSign.

Step 4: Verify your name (this step is only for the first time you use DocuSign)

Verify that your name and initials are correct. If not, change them as needed.

Step 5: Adopt a signature

Do one of the following:

- Accept the default signature and initial style, and go to the next step.
- Click Change Style, and select a different signature option.
- Click Draw. Draw your signature/initials using a mouse, or your finger or a stylus on a touchscreen.

Step 6: Save your signature

Click ADOPT AND SIGN to adopt and save your signature information and return to the document.

Step 7: Confirm signing Confirm signing by clicking FINISH.

X

Student Signature: DocuSigned by:
Chad Hainak 12/5/2019

OFFICE USE ONLY
Processed by:
Date: Form Revised: 10/19

W GRADE DS 1 page mobile fall.doc 1 of 1

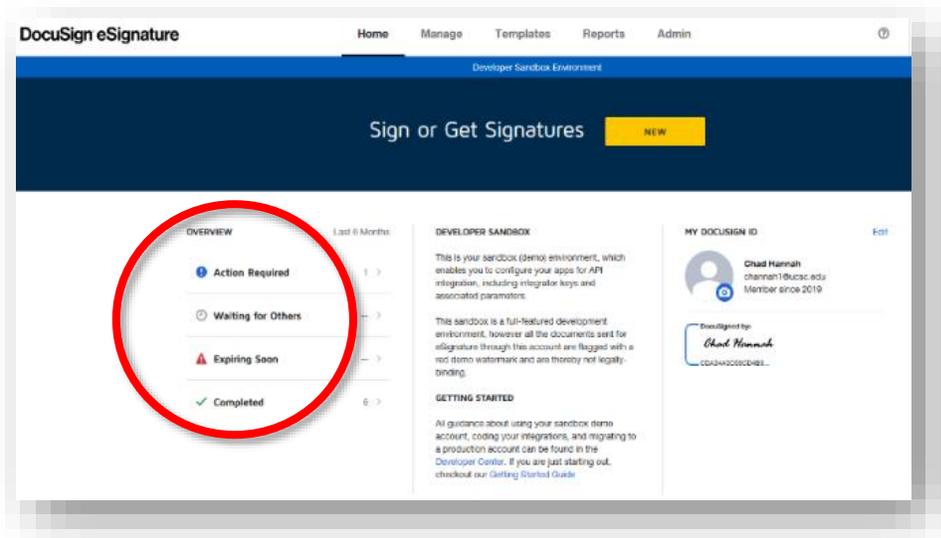
FINISH

A message appears stating that you have completed your document. You can now download a PDF copy or print a copy of the document. The sender receives an email with the signed document attached, and the signed document appears in their DocuSign account.

Overview of DocuSign Actions

On your homepage of DocuSign, and under the headings Overview, you'll have a variety of actions to review frequently.

- Action Required – documents awaiting your signature.
- Waiting for Others – documents still being reviewed by other parties.
- Expiring Soon – documents that will be expiring in the DocuSign system.
- Completed – the documents you've signed for the past 90 days.



DocuSign FAQs for Signers

Often times, only the sender of the document can assist you with inquiries regarding the following:

- The contents of the document
- Errors in the document

For questions about the contents of the document or to request correction of errors in the document please contact the sender.

Access codes / Authentication

If you never received an access code or are having trouble with the access code, the sender can provide the correct code or resend the envelope with a new code.

Failed authentication

If you fail authentication three times, you must contact the sender to have them resend the envelope with a new code.

Envelope not accessible / Envelope correction in progress

If the sender is correcting the envelope, they must finalize their corrections before you can access the document. Please contact sender regarding the corrections.

Finish button does not appear

If the Finish button is not appearing, it is due to one or more incomplete required fields. Once a page has had all required fields met – A green check mark appears. If this does not resolve the issue, please reach out to the sender of the document to ask them to investigate. One possibility is that the document has overlapping tags, which can only be corrected by the sender.

How do I know who sent me this document?

The notification email you received contains the name and email address of the sender - to contact the sender, please use the email address included in the notification.

Why do I keep getting notifications - how do I stop these?

DocuSign sends email notifications on behalf of its users. Each sender has the ability to set how often to send email reminders.

Your options to stop receiving email reminders to sign:

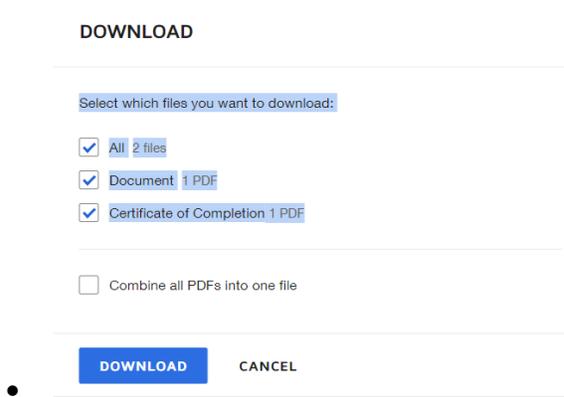
- Decline to sign
- Complete signing
- Contact the sender and ask them to Void/Cancel the document. You can simply "reply to" the email notification to contact the sender of the document.

How do I download documents from my account?

To download your completed documents from your account, follow these steps:

- Log in to your DocuSign Account.
- Open up the completed document that you would like to save.
- Click the icon with the down arrow. 

You will get the option to Select which files to download. Selecting All is the recommended approach as it includes the Summary.pdf file which is the Certificate of Completion.



The screenshot shows a 'DOWNLOAD' dialog box with the following elements:

- Title: DOWNLOAD
- Instruction: Select which files you want to download:
- Selection options:
 - All 2 files
 - Document 1 PDF
 - Certificate of Completion 1 PDF
- Additional option:
 - Combine all PDFs into one file
- Buttons: DOWNLOAD (highlighted in blue) and CANCEL

Note: Documents will not be attached to the confirmation email after signing, you will have to download them using this method.

Why am I unable to access the envelope?

It could be that someone forwarded you their DocuSign email.

If you are not a party (sender or recipient) to the envelope, you will be unable to access for security reasons. You can request that the sender uses the DocuSign forward feature to provide you a copy of the completed envelope.