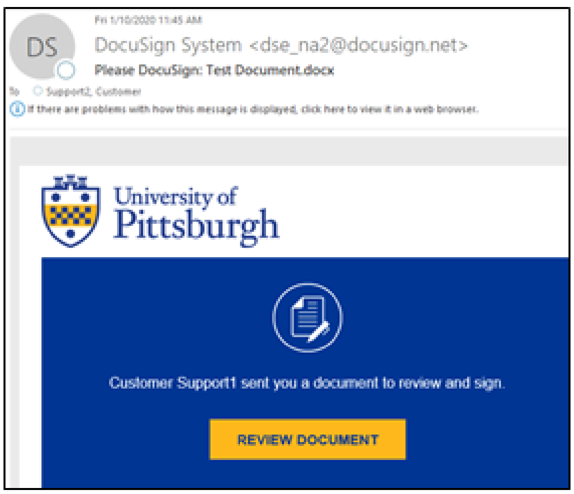
eSignature Service (DocuSign) – Getting Started

Your Pitt eSignature Service (DocuSign) account is setup the first time you access **DocuSign** using **My Pitt**. You will be prompted to adopt a signature and initials, or you can scan and upload your own signature and initials.

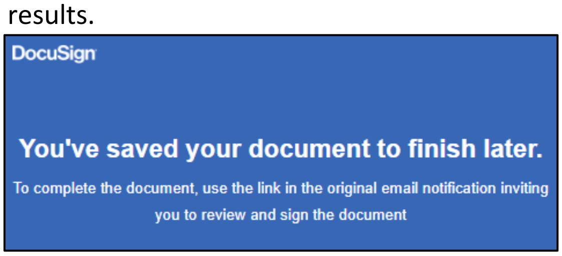
SIGNING DOCUMENTS:

When someone sends you a document, you receive an email notification.

1. Select **Review Document**.



2. If you are ready to sign, click .
   Otherwise, choose **Other Actions**, such as **Finish Later**, **Assign to Someone Else**, or **Decline to Sign**.
   Note: As a signer, take action on your documents via the link in the original email notification. For example, if you chose **Finish Later** here's a message showing your results.



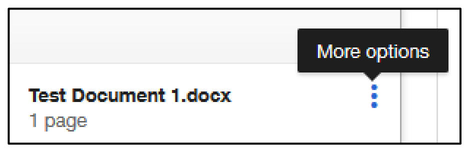
3. You receive an email copy of eSignature documents you sign.

SENDING DOCUMENTS:

1. Login to **My Pitt.**
2. Select **DocuSign**.
3. From the **Home** or **Manage** tab, select , then **Send an Envelope**.

Add Documents to the Envelope:

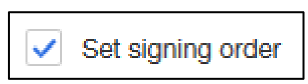
1. Select **Upload** *or* **Use a Template** (see the **Additional Information** on page 2) *or* **Get from Cloud**.
2. If needed, select **More Options** to **Replace**, **Rename**, **Delete**, and **View** documents.



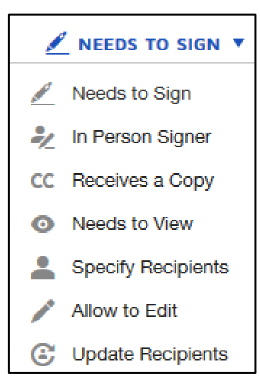
Add Recipients to the Envelope:

To send document(s) to recipients who need to sign them sequentially:

1. Check **Set signing order**.



2. Select an **Action** for each Recipient.



PittIT eSignature

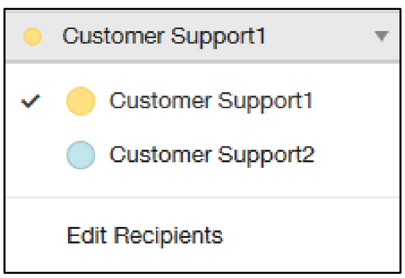
eSignature Service (DocuSign) – Getting Started

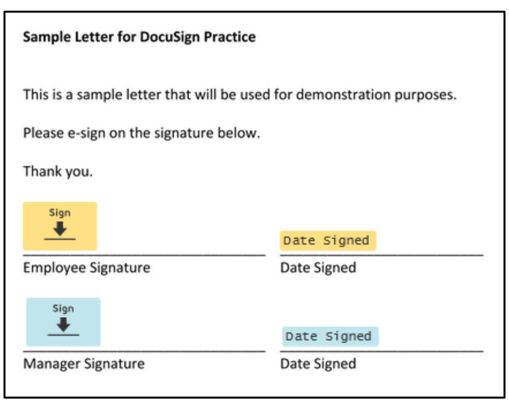
SENDING DOCUMENTS (continued):

3. Make any changes to the **Subject** and **Email Message**.
   Note: eSignature sends this email to all recipients on the envelope.

4. Select **Edit**, then **Advanced Options** to change additional messaging options.
   Note: For example, you can prevent recipients from making changes to signing responsibility.

5. Click NEXT, then **tag the document:** Select each Recipient, and drag and drop fields onto the document as needed.




Sample Letter for DocuSign Practice

This is a sample letter that will be used for demonstration purposes.

Please e-sign on the signature below.

Thank you.

Sign

Employee Signature

Date Signed

Date Signed

Sign

Manager Signature

Date Signed

Date Signed

6. Click SEND.

ADDITIONAL INFORMATION:

- **Practice with DocuSign** by sending a sample document to yourself to sign.

- **Templates** allow you to create simple or complex documents once and reuse them.

- **Contact information** can be changed:

  1. Select **your silhouette/picture**.
  2. Select **My Preferences**, then **(Account) Contacts**.
  3. Make your changes.

- **Notifications** are automatically emailed to you regarding all your activities. To review and manage the list of activities that generate these emails:

  1. Select **your silhouette/picture.**
  2. Select **My Preferences**, then **(Signing and Sending) Notifications.**
  3. Make your changes.