**DocuSign Procedure**

Note: You should use the most current version of DocuSign.

**Do not use DocuSign until you have the entire application packet completed**. A complete application packet will consist of the Adobe application packet, eligibility documents as applicable (SSI/Homeless/ FIP/Foster), proof of all household income, immunization record, birth certificate (if available). Once you have all the documents that apply to the application packet you can begin the DocuSign process. When uploading the documents upload them in the following order:

1. Adobe Application Packet
2. Eligibility documents (SSI/Homeless/ FIP/SNAP/Foster)
3. Household Income documents
4. Immunization Record
5. Birth Certificate

When saving the completed Application Packet file, save as: First initial, Last name, Date of birth. For example: A Temple 1-15-2016.

The ERSEA Manager reviews 1000+ applications each year. By using the format of uploading and labeling all applications in the manner described above it will help create greater efficiency and organization for all individuals involved in the application verification/recruitment/acceptance and enrolment processes.

**Uploading Documents -** This is where you will upload documents.

1. Using your mouse cursor left click the Yellow box labeled *Start located in the center of the screen*.
2. A drop-down menu will appear. Now left click your cursor on *Send an Envelope*.
3. You are now on a new screen. Under the Heading Add Documents left click your mouse cursor on the blue box labeled *Upload*.
   1. Now left click your curser on the word *Browse*.
4. Locate the document to upload. Double click your left mouse button on the document. Once loaded it will appear under the Heading Add Documents to the Envelope.
5. If you need to add further documents (income, immunizations, birth certificate, etc.) repeat steps 3 and 4.

**Add Recipients to the Envelope** - This is where you will add the individuals that will sign and receive the document. You do not need to add yourself to this. As the sender you will automatically receive the documents.

1. Scroll down below *Add Documents to the Envelope* and you will find *Add Recipients to the Envelope*.

1. Under Add Recipients to the Envelope there is a box next to Set signing order. Left click your mouse on this box to check it. A number 1 now appears in a box to the left of the box that has Name and Email located in it. The name of the individual that is place in this box will receive the documents first.
2. **Adding recipients that WILL SIGN the document**. The Parent/Guardian/Foster that the application was completed with.

In the box to the right of the #1, under *Name,* type the name of the individual signing the document.

In the box under *Email,* type the email address of the individual signing the document. This is the address the document will be sent to. To the right of the signer’s name are the words *NEEDS TO SIGN*. If you left click your mouse one on these words a drop down menu appears with three choices. *Needs to sign* must be selected in order to have this individual sign the document. Note: When Third Party documentation is used, a second Envelope must be sent containing only the Third Party document. This will maintain confidentiality of the applying family’s personal information.

1. If a second individual needs to sign the document, left click your mouse button once on the *ADD RECIPIENT* box located below the Email box of the Recipient you just entered. Repeat step 3 with the new individual’s name. You can input the same email address or add a different email address, whichever is easier for the family. You will notice that the number 2 will appear in a box to the left of the recipient box. This will be the second person that will receive the document. If a third, fourth and so on individual needs to sigh the document repeat step 4. If not, go to step 5.
2. **Now it is time to add recipients that DO NOT sign the document.** (Individual Verifying the application, local ISD, or any individual that will need the application once completed.)

The Non-Signature Recipients will receive the document once it has been signed by the Parent/Guardian/Foster. Once again left click your mouse on the ADD RECIPIENT box. You will add individuals that will receive the document. Initially you will need to manually enter the name and e-mail of the individual you would like to receive the documents. Once they have been entered they will appear in the contacts located in the ADD FROM CONTACTS at the top right side of your screen for future reference. If you left click your mouse on ADD FROM CONTACTS a new box will open that will allow you to search and select the desired contacts that you have previously entered. You can choose multiple Recipients at this time. Once they have been added to the list of recipients you will need to change the *NEED TO SIGN* option to *CC Receives a Copy*. To do this left click your cursor on NEEDS TO SIGN located to the right of a recipient’s name. In the drop down menu left click your cursor on CC Receives a Copy. The drop-down box will disappear and you should now see CC Receives a Copy.

* 1. If you need to remove a recipient, use your mouse to hover the cursor to the right of the recipient box. A **X** will appear. Left click your mouse button once and the recipient will be removed.
  2. If you need to change the recipient order, renumber the boxes to the left of each recipient. The number you place in the box will move the recipient to another place in the signing and or receiving order.

1. Now that all documents have been loaded and recipients added, you can enter the email subject and message. This is located under the ADD RECIPIENT box. Using your mouse, place your cursor on the desired box, and left click the mouse once. You can now type your message in the box.
   1. Email Subject example: Name, Location of application. Example: Betty Smith Manton Preschool Application.
   2. Email Message example: Hi *Parent/Guardian/Foster* name, thank you for taking the time to complete the preschool application for *child’s name*. After receiving your income documentation, Willie is eligible for Head Start and GSRP.   Attached you will find the application, please review it and sign in the indicated places.  If you have any questions, please let me know.
2. Once you have entered the email subject and message it is time to delete unnecessary documents, place the signature and date fields.

**Deleting Unnecessary Documents**

1. Place your cursor over the yellow box labeled *NEXT* located on the bottom right side of your screen. Left click your mouse button once.
2. A boxed labeled *Manage PDF form field data* has now appeared. Under the question, *What would you like to do?,* place your mouse cursor on the circle located to the left of Keep PDF Form Data. Left click your mouse once to select this. Note: In selecting this option, it ensures that the recipients of the documents CAN NOT change any of the information that has been inputted into the documents. Now, using your mouse, move the cursor to the blue box labeled *CONFIRM*. Left click your mouse once to select it.
3. Now determine if you need to delete any unnecessary pages. On the right side of your screen small versions of the documents that were uploaded will appear. You can use your mouse to scroll through the documents. On each document there is a trash can on the bottom left corner. To delete a document, hover your mouse cursor on the trash can and left click the mouse button. A new box will appear in the center of your screen. In the new box hover your mouse cursor over the blue box that is labeled *DELETE and left click your mouse. The unnecessary document is now deleted.*

**Placement of Signature, Date Signed, and Text Fields**

With One Recipient Signer

1. Placement of *Signature* *Fields*.

Near the top on the left side of your screen place your mouse cursor on the word *Signature*. Left click your mouse once. Place your mouse cursor on the document. You will now see a yellow box labeled *Sign.* Using the wheel on the top of your mouse scroll the document until you find the location you want to place a signature field. When placing the signature field orientate the line below the downward arrow onto the line the signature will be placed. Place the signature field on the left end of the line. Once you have the signature block where you need it, left click the mouse once. To place another signature field repeat this step.

1. Placement of Date Signed Fields.

Near the top on the left side of your screen place your mouse cursor on the word *Date Signed*. Left click your mouse once. Place your mouse cursor on the document. You will now see a yellow box labeled *Date Signed.* Using the wheel on the top of your mouse scroll the document until you find the location you want to place a Date Field. When placing the Date Field, orientate the yellow box above and centered on the line you would like the date to appear. Once you have the Date Signed field where you need it, left click the mouse once. To place another Date Signed field repeat this step.

1. Placement of Text Fields

Near bottom on the left side of your screen place your mouse cursor on the word *Text*. Left click your mouse once. Place your mouse cursor on the document. You will now see a yellow box labeled Text. Using the wheel on the top of your mouse scroll the document until you find the location you want to place a Text Field. When placing the Text Field, orientate the yellow box above and centered on the line you would like the date to appear. Once you have the Text field where you need it, left click the mouse once. You can adjust the size of the Text field by hovering your cursor over the circle on the corner of the text box. Left click and hold your mouse button while dragging to desired size. To place another Text field repeat this step.

**Placement of Signature, Date Signed, and Text Fields**

With Multiple Recipient Signers

1. Near the top left side of the screen, you will see the name of the Recipient Signer with a yellow circle to the left of their name. The person listed here is the first signer of the document. Follow the instructions as listed above With One Recipient Signer to place the desired Signature and Date Fields for this individual.
2. Now you need to switch Recipient Signers/Individuals. Using your mouse once again, move the cursor to the near top left side of the screen where the name of the first Recipient Signer with a yellow circle to the left of their name is. On the right side of the box is a down arrow. Left click on the down arrow once. A drop-down menu appears listing the next Recipient Signer of the document with a light blue circle to the left of their name. Move your cursor to their name and left click on it once. Now you can place the Signature, Date Signed and Text Fields for the second Recipient Signer of the document by following the steps listed above with One Recipient Signer. You will notice the Signature, Date Signed, and Text Fields color matches the color of the circle to the left of the Recipients name near the top left side of the screen.
3. To and another Recipient Signer repeat the steps 1 and 2 listed directly above.

**Sending the Document**

1. On the bottom right corner of the screen, you will see a yellow box labeled *SEND.* Using your mouse hover the cursor over this box. Left click this box. You have now sent the document.
2. You will receive an e-mail confirmation when individuals view the document.
3. You will receive another e-mail confirmation when individuals have signed/completed the document.

**Viewing the Status and History of Documents**

At the top of the DocuSign Home page there are 4 different Tabs that can be opened: Home, Manage, Templates and Reports.

1. Using your mouse, hover the cursor over the word *Manage* and left click the mouse once.
2. A new screen will appear that is your Inbox for documents. These that have been completed, need to be signed, deleted, declined, etc., will appear.