

QUICK REFERENCE GUIDE



SIGNING

1. REVIEW THE DOCUSIGN EMAIL

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

2. AGREE TO SIGN ELECTRONICALLY

Review the consumer disclosure and select the checkbox I agree to use Electronic Records and Signatures. Click **CONTINUE**.

3. START THE SIGNING PROCESS

- Click the **START** tag on the left to begin the signing process. You are taken to the first field requiring action.
- Click the **SIGN** tag. You are asked to Adopt Your Signature.

4. VERIFY YOUR NAME

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

5. ADOPT A SIGNATURE

Do one of the following:

- Accept the default signature and initial style.
- Click **SELECT STYLE**, and select a signature option.
- Click **DRAW**. Draw your signature using a mouse, or your finger or a stylus.

6. SAVE YOUR SIGNATURE

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

7. CONFIRM SIGNING

When you finish clicking all signature tags in the document, confirm signing by clicking **FINISH**.

Note: 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.



SENDING

1. LOG IN

To get started, log into your DocuSign account at www.docusign.uci.edu if you have not already done so.

2. GO TO SEND

Choose **SEND AN ENVELOPE** from the **NEW** drop down menu on either the Home or Manage tab.

3. UPLOAD YOUR DOCUMENT

Click **UPLOAD** to upload a document from your computer, or click **GET FROM CLOUD** to upload a document from an online location. Locate the document you want to upload and click **OPEN**.

4. ADD THE RECIPIENT

- Under **ADD THE RECIPIENTS**, enter the recipient's name and email address.
- Choose **NEEDS TO SIGN** for those recipients you need to have sign.

5. ADD THE EMAIL SUBJECT AND MESSAGE

DocuSign automatically adds an email subject when you upload a document. You can edit this subject and add a message to the recipient by filling in the **MESSAGE** field.

6. ADD SIGNING FIELDS

- Click **NEXT**. The **FIELDS** menu appears on the left side of the screen and your document appears on the right side. The recipient name is on the to line at the top of the document.
- To assign a signature or other field for the recipient, click and drag a field from the **FIELDS** menu and place it on the document.

7. SEND YOUR ENVELOPE

When ready, click **SEND**.