

ASA - DocuSign

CIRES IT

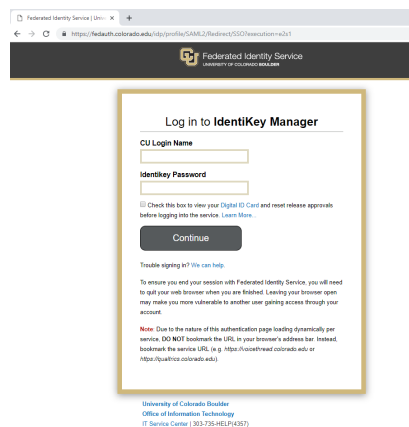
How to get your ASA documents uploaded to docuSign and digitally signed

Step 1

Browse to <https://insidecires.colorado.edu/asa> and download the document you'd like to get added to docuSign (ex. Supervisor Assessment).

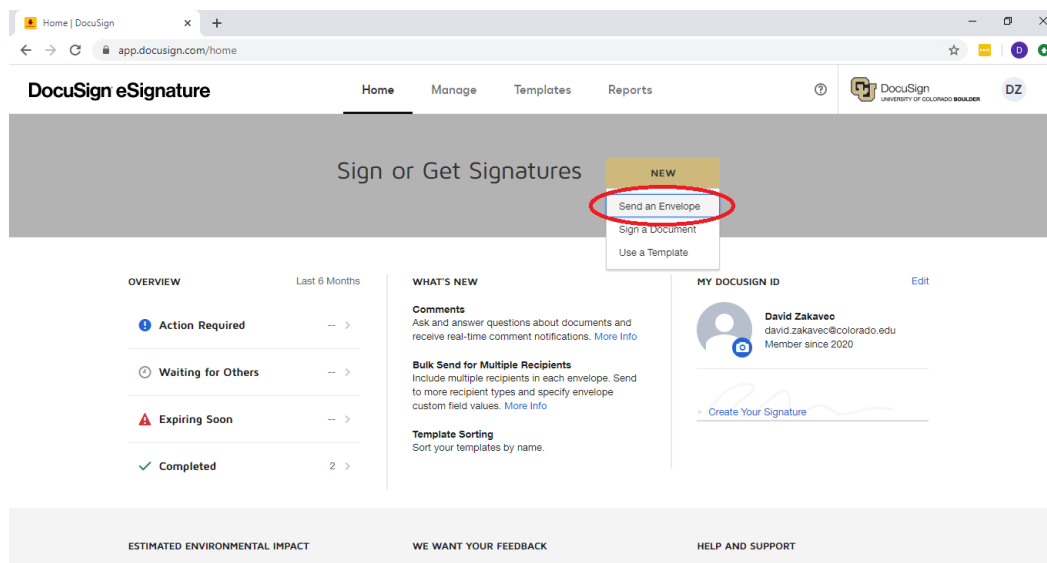
Step 2

Browse to <http://docuSign.colorado.edu/> and login with your identikey and identikey password



Step 3

Once logged in click the “New” button and click “Send an Envelope”



Step 4

Click the Upload button and browse to where you saved the ASA document that you need signed. Select the document and click open.

The screenshot shows the DocuSign 'Prepare Envelope' interface. The browser address bar displays 'app.docusign.com/prepare/07c1ddd1-44a2-4103-91a1-ad31c07e4cf1/'. The page title is 'Upload a Document and Add Envelope Recipients'. The 'ACTIONS' menu is open, showing 'RECIPIENT PREVIEW' and 'NEXT' buttons. The main section is 'Add Documents to the Envelope', which contains three buttons: 'UPLOAD' (circled in red), 'USE A TEMPLATE', and 'GET FROM CLOUD'. Below this is the 'Add Recipients to the Envelope' section, which includes a checkbox for 'Set signing order' (checked), a table with one row for 'Name *', and buttons for 'NEEDS TO SIGN' and 'MORE'. At the bottom right, there are 'SEND NOW' and 'NEXT' buttons.

Step 4

You'll see a small preview of the document that you just uploaded. Now it's time to add the recipients that will need to sign the document (this includes yourself). Scroll down to the "Add Recipients to the Envelope" section.

The screenshot shows the DocuSign 'Prepare Envelope' interface. The browser address bar displays 'app.docusign.com/prepare/d9654961-b367-4993-acdd-edc6e4b382db/'. The page title is 'Upload a Document and Add Envelope Recipients'. The 'ACTIONS' menu is open, showing 'RECIPIENT PREVIEW' and 'NEXT' buttons. The main section is 'Add Recipients to the Envelope', which includes a checkbox for 'Set signing order' (checked), a table with one row for 'Name *' and 'Email *', and buttons for 'NEEDS TO SIGN' and 'MORE'. Below the table is an 'ADD RECIPIENT' button. At the bottom, there is a 'Message to All Recipients' section with a checkbox for 'Custom email and language for each recipient' and an 'Email Subject' field. To the right is an 'Advanced Options' section with a list of options: 'Recipients can change signing responsibility', 'Incomplete envelopes expire 30 days after send date', 'Recipients are warned 5 day(s) before request expires', and 'Senders can use either quick send or advanced edit'. At the bottom right, there are 'SEND NOW' and 'NEXT' buttons.

Step 5

Enter your name and email in the first recipient box. Then click the Add Recipient button.

Prepare Envelope | DocuSign

Upload a Document and Add Envelope Recipients

Add Recipients to the Envelope

As the sender, you automatically receive a copy of the completed envelope.

[Import a bulk list.](#) Send copies of this envelope to many people at once.

Set signing order

1

Name *
Supervisor Name

Email *
supervisor@colorado.edu

ADD RECIPIENT

Message to All Recipients

Custom email and language for each recipient

Email Subject*

Advanced Options | [Edit](#)

- Recipients can change signing responsibility
- Incomplete envelopes expire 30 days after send date
- Recipients are warned 5 day(s) before request expires
- Senders can use either quick send or advanced edit.

SEND NOW **NEXT**

Step 6

Enter the name of your employee and their email address. Click the Add Recipient button.

Prepare Envelope | DocuSign

Upload a Document and Add Envelope Recipients

Add Recipients to the Envelope

As the sender, you automatically receive a copy of the completed envelope.

[Import a bulk list.](#) Send copies of this envelope to many people at once.

Set signing order

1

Name *
Supervisor Name

Email *
supervisor@colorado.edu

2

Name *
Employee Name

Email *
employee@colorado.edu

ADD RECIPIENT

SEND NOW **NEXT**

Step 7

Enter CIRES HR for the Name of the last recipient and enter ciresasa@colorado.edu for the email. Click on the down arrow next to “Needs to sign” and select – Receives a Copy

The screenshot shows the 'Prepare Envelope' interface in DocuSign. It displays three recipients in a list:

- Recipient 1: Name: Supervisor Name, Email: supervisor@colorado.edu. Action: NEEDS TO SIGN.
- Recipient 2: Name: Employee Name, Email: employee@colorado.edu. Action: NEEDS TO SIGN.
- Recipient 3: Name: CIRES ASA, Email: ciresasa@colorado.edu. Action: NEEDS TO SIGN. A dropdown menu is open for this recipient, and the option 'CC - Receives a Copy' is highlighted with a red circle.

Buttons for 'ADD RECIPIENT', 'SEND NOW', and 'NEXT' are visible at the bottom.

Step 8

Scroll down and make any adjustments to the message that the recipient will receive. Click Next when done.

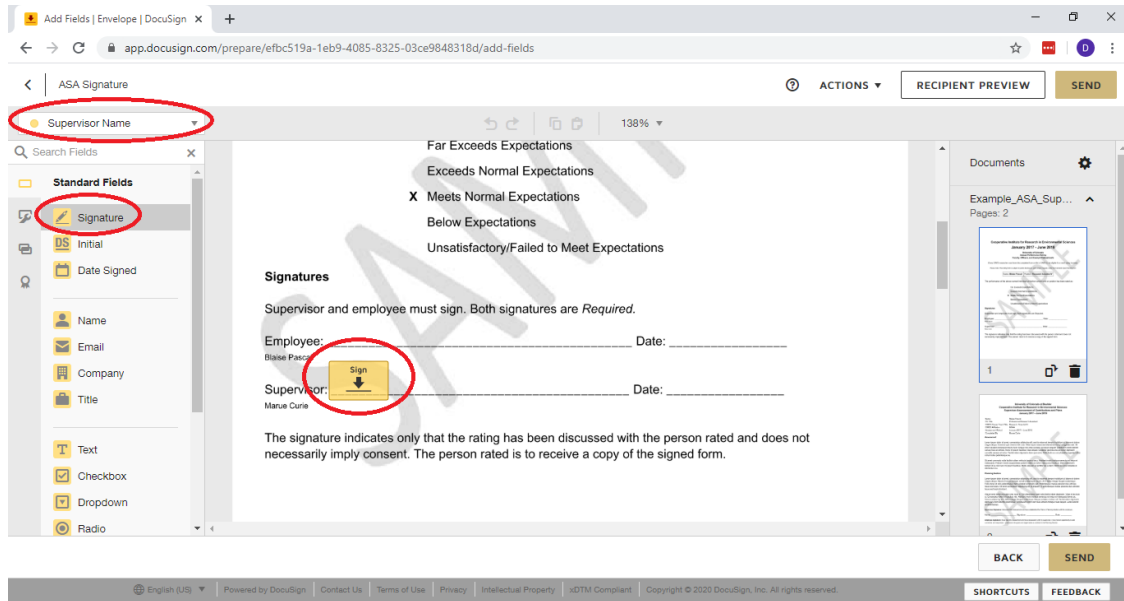
The screenshot shows the 'ASA Signature' configuration screen in DocuSign. It includes the following fields and options:

- Message to All Recipients:** A checkbox for 'Custom email and language for each recipient' is unchecked.
- Email Subject:** 'ASA Signature' (Characters remaining: 87).
- Email Message:** 'Please review and sign your ASA Assessment' (Characters remaining: 9957).
- Advanced Options:** A list of options including 'Recipients can change signing responsibility', 'Incomplete envelopes expire 30 days after send date', 'Recipients are warned 5 day(s) before request expires', and 'Senders can use either quick send or advanced edit'.

Buttons for 'SEND NOW' and 'NEXT' are visible at the bottom, with 'NEXT' circled in red.

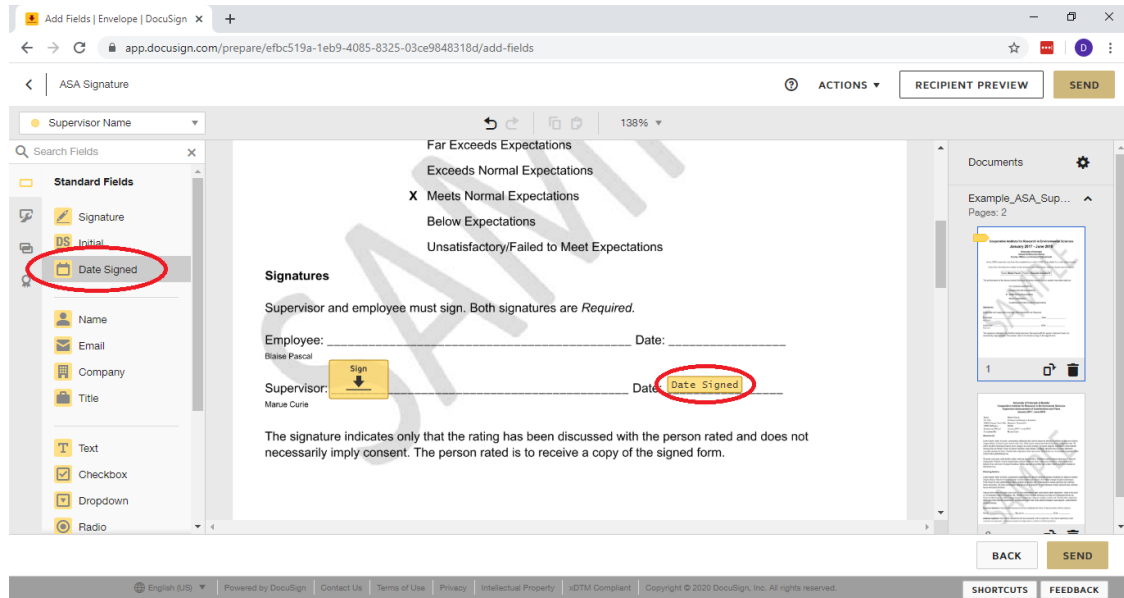
Step 9

Scroll down to where your signature needs to be. Make sure your name is selected in the dropdown in the top left. Click the signature icon and drag it to the signature line. Click where you want to place it.



Step 10

Click the Date Signed icon and drag it to the date line. Click where you want to place it.



Step 11

Repeat steps 9 and 10 for the employee signature, make sure to change the drop down to the employee's name.

ASA Signature

Employee Name

Standard Fields

- Signature
- Initial
- Date Signed
- Name
- Email
- Company
- Title
- Text
- Checkbox
- Dropdown
- Radio

Far Exceeds Expectations
Exceeds Normal Expectations
X Meets Normal Expectations
Below Expectations
Unsatisfactory/Failed to Meet Expectations

Signatures
Supervisor and employee must sign. Both signatures are Required.

Employee: Sign Date:

Supervisor: Sign Date:

The signature indicates only that the rating has been discussed with the person rated and does not necessarily imply consent. The person rated is to receive a copy of the signed form.

Recipient: Employee Name

Formatting

Data Label

Location

Save As Custom Field

Delete

BACK SEND

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Step 12

Click the Send button.

ASA Signature

Employee Name

Standard Fields

- Signature
- Initial
- Date Signed
- Name
- Email
- Company
- Title
- Text
- Checkbox
- Dropdown
- Radio

Far Exceeds Expectations
Exceeds Normal Expectations
X Meets Normal Expectations
Below Expectations
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Save As Custom Field

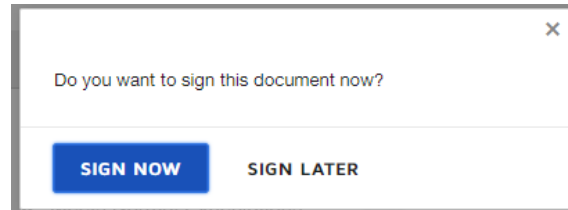
Delete

BACK SEND

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Step 12

Since your name is the first recipient a pop up should show up that asks if you want to sign the document now, click Sign Now. If you don't see this you'll be brought back to where you can Manage your sent documents. Click on the Sign button next to the one you just created.



Step 13

Follow the DocuSign prompts to sign the document. Once you're done, an email will automatically be sent to your employee notifying them that they need to sign the document. After they've signed the document you'll receive an email from DocuSign letting you know the document has been completed. It includes a link to the signed document. The CIRES ASA team will also receive a copy of this email. Please email ciresithelp@colorado.edu if you have any trouble or questions about the process.

Need Additional Help?

Please contact CIRES IT with any question or comments you may have.

Email: ciresithelp@colorado.edu

Phone: 303-735-4200

Main Office: CIRES 216

