OSU Foundation FS Index Reimbursement System

How to create a Signer Sheet form with DocuSign Routing

**IMPORTANT:** You must first prepare and complete the Signer Sheet form process in the OSU Reimbursement and Scholarship System.

**Become a DocuSign Sender**

1. Review the DocuSign Signers and Senders videos located in the Resources section on the DocuSign website ([http://is.oregonstate.edu/docusign](http://is.oregonstate.edu/docusign)). (Total Time: ~15 minutes)

2. After viewing the videos, submit the electronic application for DocuSign Sender access (*Sender Access Request*). The application link is located at the bottom of the *Senders* page.

3. Log in to DocuSign ([http://is.oregonstate.edu/docusign](http://is.oregonstate.edu/docusign)) using your ONID credentials. The system will accept you into the system as a Viewer. Once the *Sender Access Request* form is approved and submitted by your supervisor, your role in DocuSign will be promoted to Sender.

**Prepare the OSUF Signer Form**

1. Log in to the OSUF Reimbursement & Scholarship System to create or edit an *Authorized Signer Request* form. (See the OSUF Signer Sheets [Help Guides](http://osuf.oregonstate.edu) for more information.) Print the Signer Sheet.

   **SPECIAL NOTE:** The OSUF Reimbursement & Scholarship System process must be completed in order to produce a Signer Sheet.

2. Once the process is complete, the Equity Account (Project Id) Signature Form will appear with the Project ID, Project Title and names of the persons being added or deleted as authorized signers. Save the electronic form as a PDF on your computer.

![OSUF Signer Sheet Form](image-url)
Log in to DocuSign
2. Click the OSU Sign In link.
3. Log in using your ONID credentials.

Start the Document
1. Upon login, the DocuSign Home page is displayed.
2. Click the New button.
3. From the dropdown list, choose Send an Envelope.
4. The system will display, *Upload a Document and Add Envelope Recipients* dashboard.

5. Under *Add Documents to the Envelope*, choose Upload.

6. Your browser’s file upload screen will open (display).

7. Locate the document in your browser. Click to select (highlight) and choose *Open*. DocuSign will upload the document selected.

**Upload Supporting Documents**

Supporting documents can be additionally uploaded by clicking on the *Document Upload* icon. This icon is next to the icon of your initial form. You can add several items as the button will reopen after each addition. These additional documents will be automatically added to your Signer form.
Adding Recipients

For this example, assume two signers, Jack Breen and Hollie Pitts are being added to an OSUF Signer Sheet. If a person is being removed as an OSUF signer and is no longer available, you will need to add yourself as the first signer. Later on in the DocuSign process you will add a textbox where you can indicate the “person retired”, “no longer employed”, etc.

1. Click the Add Recipients button. Enter the name(s) of the signer(s) being added.
2. If a person(s) is being removed as they have left OSU, and you are going to enter a notation rather than have them sign, do not add there name as a signer.
3. Enter the name of the Dean, Director or Department Head responsible for the approval (this is still blank in the example below).
4. Add as the last recipient the signing group, OSU Foundation Signer Sheets. This step is the one that routes the OSUF Signer Sheet to a group of OSUF employees for processing. For the OSUF Signer Sheets recipient, click on the Needs to Sign and from the dropdown list select, Receives a Copy.

5. If additional people need to receive a copy of the OSUF Signer Sheet, use the Add Recipient button at the bottom and specify, Receives a Copy as described above.
Checking the Document

1. Locate the Next button in the upper right hand corner of the screen.

2. The system will display the Signer Sheet form (including supporting documents) uploaded in DocuSign.

3. Add the Signature Tags to the form Signature Lines. As outlined above, if a Signer is not available, add a text box on the Signature Line indicating the reason the person is not available.

4. In the OSUF Signer Sheet example, Jack Breen is the first signer.

5. In the upper left hand corner of screen, there is a drop down window (above the Standard Fields column). From this box, drag and drop a Signature Tag for each signer.
For this example, drag Jack Breen III from the upper left hand box and drop onto the Signature line next to his name.

6. From the upper left hand (dropdown) box, locate the name(s) of additional Signers, once again dragging and dropping the person’s name on to the form’s Signature line, thus creating the Signature Tag.

Continuing the example, drag Hollie Pitts’ name onto the Signature line of the OSUF Signer Form.

7. If an alignment adjustment is necessary for Signature Tag placement or for multiple tags placements, select (click) a single tag or for many tags, use the mouse, dragging a box around all the tags. Use the keyboard arrow buttons or the Alignment keys located at the top of the right hand panel for tag alignment adjustment(s).
Sending your OSUF Signer Sheet Form

Following the placement of the Signature Tags, click Send. This button is located on the upper right hand corner of the screen.

Monitoring the Status of your Document

From the DocuSign home page, locate the Overview panel on the left hand side of the screen. There are four folders available for determining the status of your document, Action Required, Waiting for Others, Expiring Soon and Completed. Click on the area of interest to review your document’s status.