# DocuSign Instructions: Vendor Signers

Thank you for being a valued Milwaukee County vendor! As you may be aware, Milwaukee County utilizes DocuSign, an electronic signature and digital transaction management service, to execute County contracts. Since March of 2018, the County has requested that all Milwaukee County vendors execute contracts with the County utilizing DocuSign. This service comes at no cost to you, reduces contract execution times, and increases efficiency for Milwaukee County and its vendor partners. More information about the legality and use of electronic signatures in contracting may be found at the end of this document.

This document will provide you with clear, step-by-step instructions to receive, open, and sign Milwaukee County contracts. If at any time you require additional assistance utilizing the DocuSign application, please contact Procurement via email at procurement@milwaukeecountywi.gov.

Signing a Contract Using DocuSign

1. Provide your signer's name and email address to your Milwaukee County contact during the purchasing process or during contract negotiations. Your contact may be a contract administrator, buyer, department head, or other staff member.

2. Once contract negotiations are complete, your Milwaukee County contact will upload the contract into DocuSign. Your signer will automatically receive an email notification from DocuSign stating they have an item to sign. **Please do not delete your notification email.** If you need to return to the document, you will need the link provided in your notification email to access the document. The email notification should include the County's logo and be branded with Milwaukee County's colors.
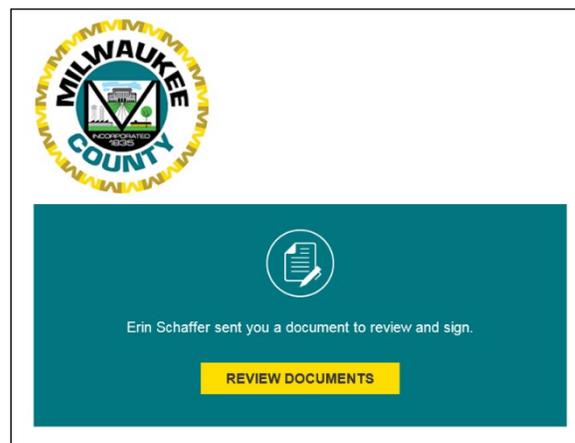
3. If you are not receiving DocuSign email notifications, you or your IT department, may need to add the following emails as "Safe Senders" or "Trusted Senders" to prevent your spam filters and other security tools from blocking DocuSign automatically.
   - dse@docusign.net
   - dse_demo@docusign.net
   - dse_na2@docusign.net
   - dse_na3@docusign.net

- dse_eu1@docusign.net
- dse@eumail.docusign.net
- dse_staging@docusign.net
- Allow emails from the domains @docusign.net & @docusign.com

4. Click the "REVIEW DOCUMENTS" button in the DocuSign email. You will be automatically redirected to the below DocuSign landing page to review and act on the documents sent to you.

If you have never signed a document in DocuSign, you will need to do the following:
- Read the Electronic Record and Signature Disclosure
- Adopt a signature
- Click the check box to agree to use e-records and signatures. Once you check the box, the "CONTINUE" button will become bright gold.

If you previously read and agreed to the Electronic Record and Signature Disclosure, clicking the link will send you directly to the document you need to sign.

5. Read the contract document.
- **If you agree** to the terms and conditions as written and you are ready to sign the contract, click the "CONTINUE" button to move to the signature screen.
- **If you do not agree** to the terms and conditions, or you are not ready to sign, click the "OTHER ACTIONS" button and skip to step 9.

6. Click the "CONTINUE" button to open the signing screen. Clicking the "START" tab will direct you to the areas where your signature or other information is required.

7. Click on the field(s) you need to complete. When you click the "Signature" field, your signature will automatically be entered in the field. The "date signed" field will be automatically populated on the day you sign. If there are other fields that require input, you may need to type in the requested information, such as your organization's name, a tax ID #, or your email address.

8. Once you have completed all the fields, click the "FINISH" button. You will be taken to a landing page advising that your signature is complete and provided the option to set up a free DocuSign account. There are no additional actions necessary from you. When the contract has completed signature process for Milwaukee County, you will automatically be emailed a copy of the fully executed contract.

9. After reading the contract document, you decide you:
   - are not ready to sign the contract
   - want and are permitted to sign on paper
   - are not the correct signer for your organization
   - have found errors or material issues with the terms of the contract and wish to decline to sign

   You will need to click the "OTHER ACTIONS" down arrow.

A list of available options will open. You can choose from the list to:
   - Finish Later (Go to step 10)
   - Assign to Someone Else (Go to step 11)
   - Print & Sign (Go to step 12. Do not use this option unless given express permission.)
   - Decline to Sign (Go to step 13)

You may also view additional information about the DocuSign tool using "Help & Support" and "About DocuSign".

10. **Finish Later**

If you have opened the document but are not ready to electronically sign, you may use the Finish Later option to save the document and return to it at another time. Clicking "FINISH LATER" will close the document. You will need to use the link provided in your original email notification to access the document. When you are ready to finish signing your document, repeat steps 4-8.

11. **Assign to Someone Else**

If you are an employee who **does not have legal signature authority for your organization**, you may need to reassign the DocuSign envelope. To assign an envelope to someone else in your organization that has the legal signature authority, follow these steps:

- Click the "REVIEW DOCUMENTS" button in the DocuSign email you previously received
- Click "OTHER ACTIONS" and select "ASSIGN TO SOMEONE ELSE"
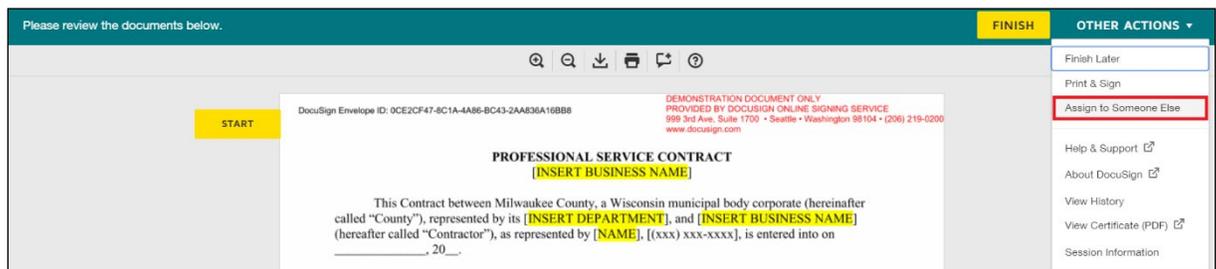
- A pop-up box will appear. Enter the new signer's email address, the new signer's name, and provide a reason for changing the signing responsibility.

- Click the "ASSIGN TO SOMEONE ELSE" button. The envelope will now route to the individual whose name and email you entered.
- The new signer should follow steps 4-8 to complete signing.

12. **Print & Sign Option**

Generally, Milwaukee County requests that all vendors sign contract documentation electronically. This process furthers the County's goal of ensuring green and sustainable processes, streamlines governmental function, and encourages transparency of government operations. However, the County acknowledges that some vendors may absolutely require "wet signatures", or pen-to-paper signing processes. If you require "wet signatures," please advise your Milwaukee County contact and confirm that you are eligible to use the print & sign option.

Follow these steps to use the Print & Sign option:

- Click the "REVIEW DOCUMENTS" button in the DocuSign email
- Click "OTHER ACTIONS" and select "PRINT & SIGN"
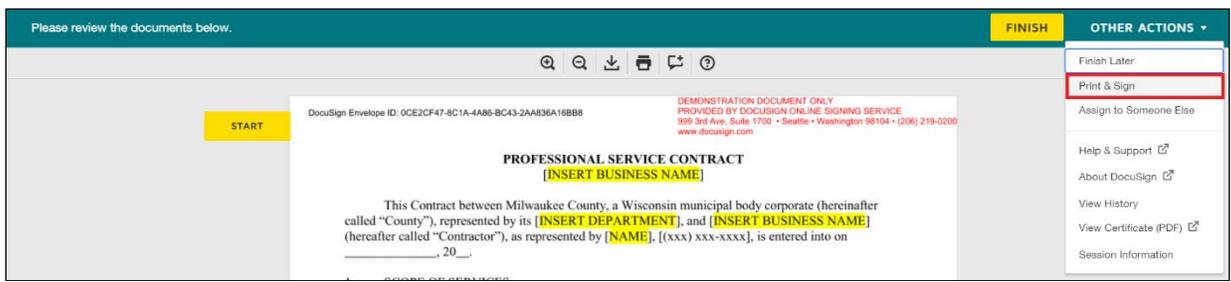
- A pop-up window will open requiring you to select either upload or fax your signed document. DocuSign will then step you through the remainder of the print & sign function.
- Select an option and click "CONTINUE." DocuSign will allow you to download and sign the document.

If you choose to fax the document, DocuSign will provide a fax cover sheet. **Do not use any cover sheets other than DocuSign's. The cover sheet identifies the DocuSign envelope and is required to ensure the signed contract is placed back in the correct DocuSign envelope after signature.**

13. **Declining to Sign**

If you find errors or problems with a document sent to you, first reach out to your Milwaukee County contact to ensure the errors cannot be corrected. If the errors cannot be corrected, or if there is material disagreement about the terms of the contract, select "DECLINE TO SIGN" in the "Other Actions" menu.

A pop-up window will open asking you to provide a reason for declining. Please be as clear and concise as possible. When you have finished your message, click "DECLINE TO SIGN." This will send a message to the sender and any recipient who has signed before you, indicating that you have declined to sign.

More Information

For more information regarding e-signatures and the law, please review:

- The Uniform Electronic Transactions Act of 1999
- The Electronic Signatures in Global and National Commerce Act
- Wisconsin State Statutes §137.15 – Legal Recognition of Electronic Records, Electronic Signatures, and Electronic Contracts

We hope that the information in this document is of value to your organization. As always, we appreciate your partnership with Milwaukee County and thank you for your continued efforts to assist us in providing excellent service to our constituents.

If you have any questions or experience any problems utilizing the DocuSign tool, please contact Procurement via email at procurement@milwaukeecountywi.gov.