DocuSign Introduction

Milwaukee County uses DocuSign, an electronic signature and digital transaction management service, to collect signatures on all County contracts. DocuSign is secure, efficient, and our vendors and other partner organizations can use a Signer version of the tool for free!

The Procurement Division is responsible for training DocuSign users, improving Milwaukee County's use of the tool, ensuring efficiency and effectiveness, and assisting with troubleshooting any technological issues that may arise.

For more information about using DocuSign, please contact the DocuSign Administrator.

Are you a vendor looking for help using the DocuSign tool to sign a Milwaukee County contract? Please read the County's **DocuSign Instructions: Vendor Signers** for more information.

Are you a County employee with a DocuSign account, and need help using DocuSign to sign or send a Milwaukee County contract or other formal document? Please read the **DocuSign Signer & Sender Training** document for more information.

For additional troubleshooting information, training, and other instructions on the use of DocuSign, please visit:

- **DocuSign Support.** Run by DocuSign, this site provides comprehensive information on the use of the DocuSign tool, including troubleshooting steps and a method for contacting the DocuSign Support team.
- **DocuSign University.** Run by DocuSign, this site provides training, tips, and tricks on the use of the DocuSign tool and features. Trainings vary based on the user's role and permissions within DocuSign.

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. **Beginning in March of 2018, the County is requesting 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.

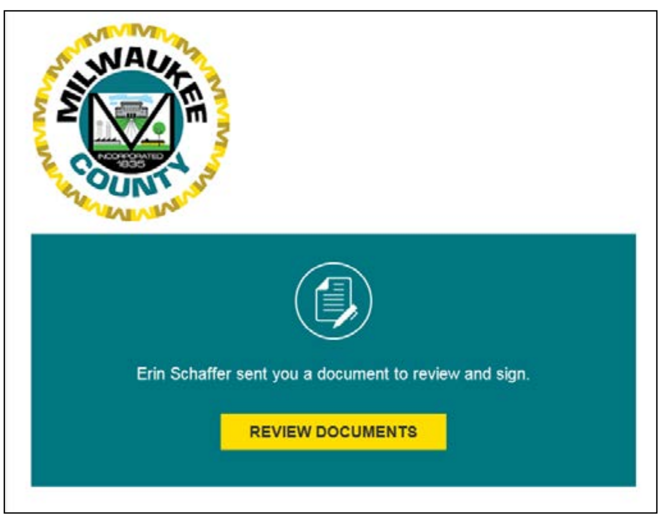
This correspondence will provide you with clear, step-by-step instructions to receive, open, and sign Milwaukee County contracts. If at any time you require additional assistance utilizing the DocuSign application, please contact Erin Schaffer, the Milwaukee County DocuSign Administrator, via e-mail at erin.schaffer@milwaukeecountywi.gov or via phone at 414-278-4129.

Signing a Contract Using DocuSign

For a step-by-step video training on signing contracts using DocuSign, please visit:
http://county.milwaukee.gov/Procurement7902/Procurement-Training.htm

1. Provide your signer's name and e-mail 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 e-mail notification from DocuSign stating they have an item to sign. **Please do not delete your notification e-mail!** If you need to return to the document at a later time, you will need the link provided in your notification e-mail to access the document. The e-mail notification should include the County's logo and be branded with Milwaukee County's colors:

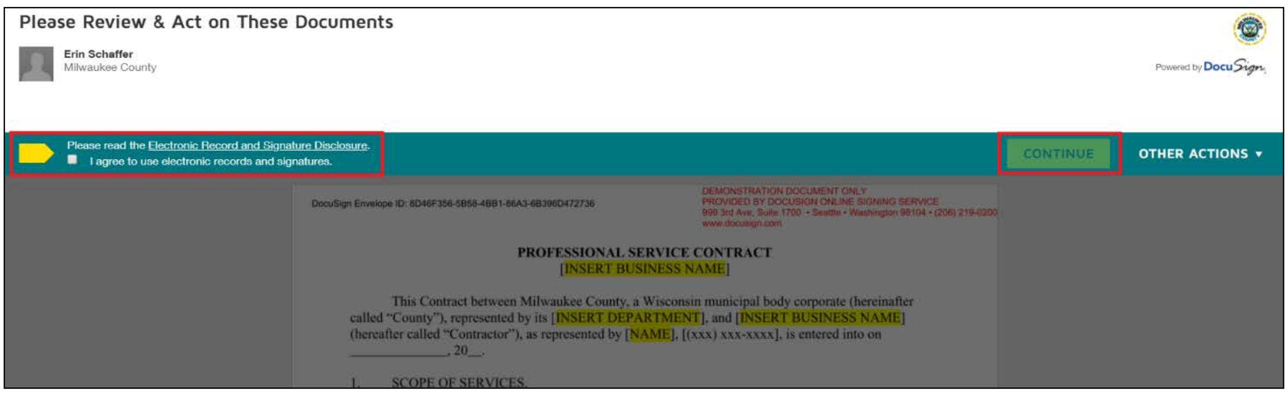


If you are not receiving DocuSign e-mail notifications, you may need to add the following e-mails as "Safe Senders" or "Trusted Senders" in your e-mail client:

dse@docusign.net
dse_demo@docusign.net
dse_na2@docusign.net
dse_eu1@docusign.net
dse@eumail.docusign.net
dse_staging@docusign.net

Alternatively, if you work in an organization with a dedicated IT department, you may need to request that your organization's IT staff "whitelist" the DocuSign domain – docusign.net. This will prevent your spam filters and other cybersecurity tools from blocking DocuSign automatically.

3. Click on the gold "Review Documents" button in the DocuSign e-mail. You will be automatically redirected to DocuSign to review and act on the documents sent to you. You should see a landing page like this:



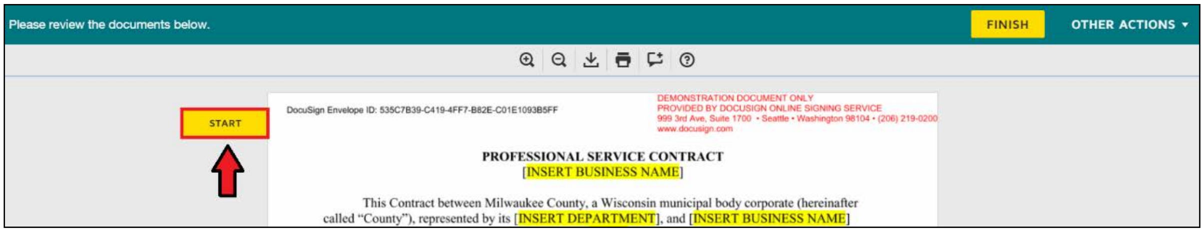
If you have never signed a document in DocuSign, you will need to read the Electronic Record and Signature Disclosure, and then click the check box to indicate you agree to use e-records and signatures, and you will need to adopt a signature. Once you check the box, the "Continue" button will become 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.

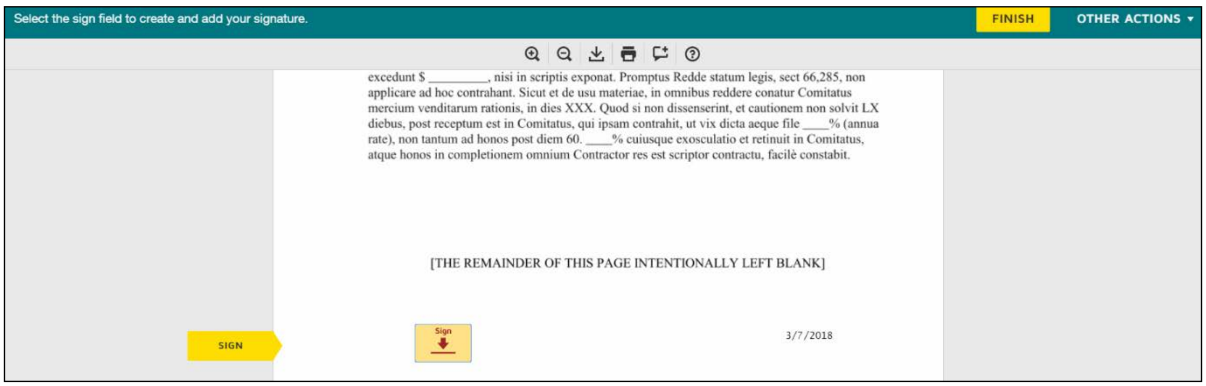
4. Read the contract document. If you agree to the terms and conditions as written and you are ready to sign the contract, you may click the gold "Continue" button to move to the signature screen.

   If you do not agree to the terms and conditions, or you are not ready to sign, click the "Other Actions" button and skip items 5-8 for now.

5. Clicking on the "Continue" button will open the signing screen. In the signing screen, click on the gold "Start" tab. This will direct you to the areas where your signature or other information is required.



6. Click on the field(s) you need to complete. For the "Signature" field, your signature will be automatically placed when you click the field. The "date signed" field will be automatically populated for you 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 e-mail address.



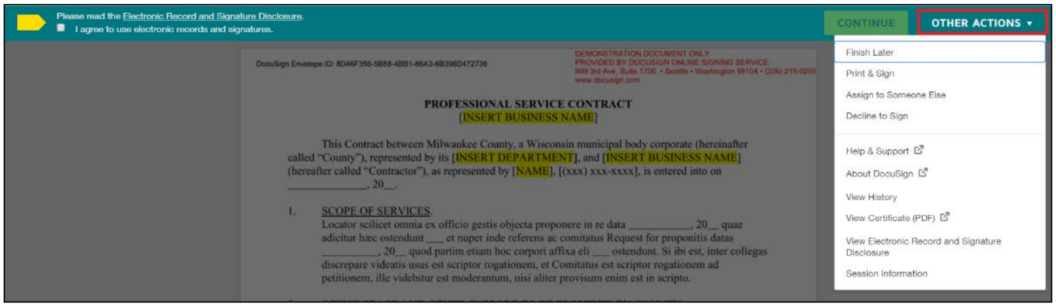
7. Once you have completed all the fields and are ready to finish signing, click the gold "FINISH" button. If you are not ready to sign, click "Other Actions" to open the drop-down menu and select finish later, assign to someone else, or print and sign. Please see items 10, 11, and 12 below for instructions on finishing later, assigning an envelope to someone else, and using the print and sign function.

8. When you click the "FINISH" button you will be taken to a landing page advising you that your signature is complete. You will be provided an opportunity to establish a free DocuSign account. There are no additional actions necessary from you at this time. When the contract has completed signature process for Milwaukee County, you will automatically be e-mailed a copy of the fully executed contract.

9. **Other Actions**

   If you have read the contract document, but you:
   - Are not ready to sign right now;
   - Want to (and are permitted to) sign on paper;
   - Are not the correct signer for your organization; or
   - Have found errors or material issues with the terms of the contract and wish to decline to sign,

   you will need to open the "Other Actions" menu by clicking the down arrow to the right of the "Other Actions" button on your landing page:



When you click the "Other Actions" button, a drop-down list of available options will open. You can choose from the list of options to:

- Finish Later (See item 10, below);
- Print & Sign (See item 11, below. Please do not use this option unless given express permission.);
- Assign to Someone Else (See item 12, below.), or
- Decline to Sign (See item 13, below).

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

10. **<u>Finish Later</u>**

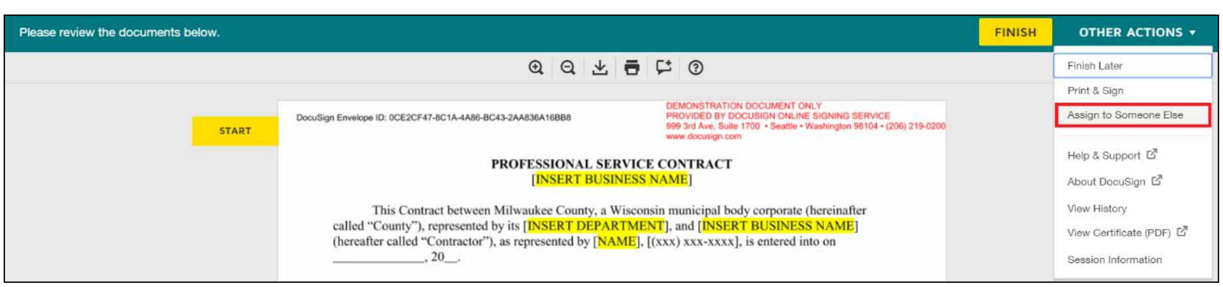
If you have opened your document but are not ready to electronically sign, you may use the "Finish Later" option in the "Other Actions" drop down menu to save the document and return to it at another time. Clicking "Finish Later" will close the document. To access the document later, you will need to use the link provided in your original e-mail notification.

When you are ready to finish signing your document, repeat steps 3-8 to complete signing.

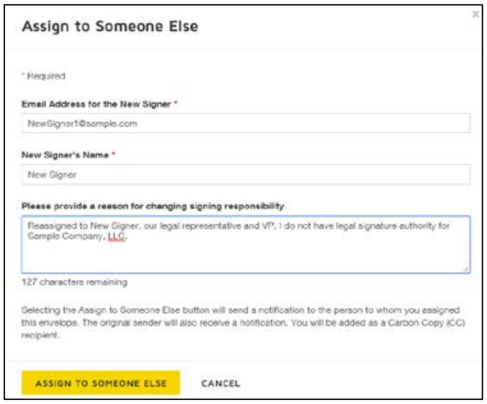
11. **<u>Assigning to Others</u>**

If you are a sales representative, contract administrator, or other employee who **<u>does not have legal signature authority for your organization</u>**, you may need to assign a DocuSign envelope sent to you to the legal signature authority. To assign an envelope to someone else in your organization:

Move through the signature process as you normally would (see above). When you reach the "Continue" screen, click "Other Actions" and select "Assign to Someone Else" in the drop-down menu.



A pop-up box will appear. You will be prompted to enter the new signer's e-mail address, the new signer's name, and to provide a reason for changing the signing responsibility.



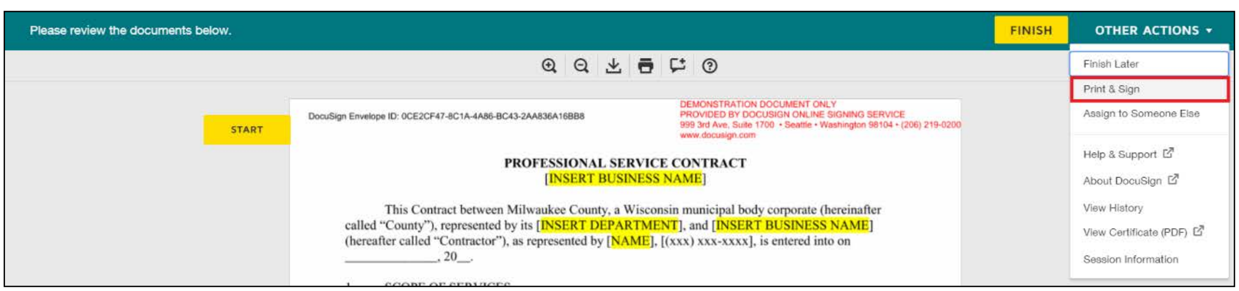
Once you have completed all fields, click the gold "Assign to Someone Else" button. You're done! The envelope will now route to the individual whose name and e-mail you entered. The new signer should repeat steps 3-8 above to complete signing.

12. **Print & Sign Option**

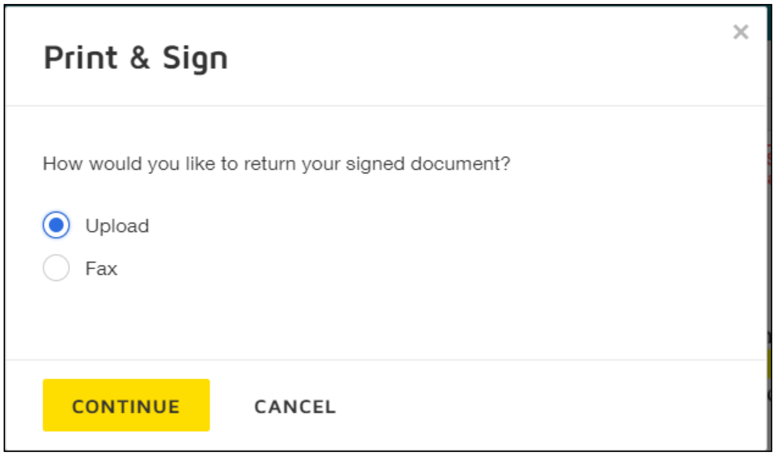
Generally, Milwaukee County requests that all vendors sign contract documentation electronically. This process furthers the County's goal of ensuring green and sustainable processes, streamlines governmental function, and encourages transparency of government operations. However, the County acknowledges 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.

If you are eligible to use the Print & Sign option:

Move through the signature process as you usually would. When you reach the "Continue" screen, click "Other Actions and select "Print & Sign" in the drop-down menu.



A pop-up window will open, prompting you to choose to 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 cover sheet! 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.**

Once you've uploaded or faxed the document back, you're done!

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. The "Decline" pop-up will open, asking you to provide a reason for declining. Please be as clear and concise as possible. When you've 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 correspondence 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 feel free to contact the DocuSign Administrator at the contact information listed in the second paragraph of this correspondence.

DocuSign Signer & Sender Training

These training materials are designed to supplement the DocuSign Signer & Sender Training. In this packet, you will find:

- How to Send a Document, including:
  - Instructions on uploading and sending a document;
  - Help with adding recipients, assigning recipient roles, and ensuring correct signing order;
  - Information about envelope's message and advanced options;
  - Instructions on adding fields and information about field types, placement, and options.

- How to Sign a Document, including:
  - Information on receiving & opening documents;
  - Instructions on creating custom signatures;
  - Instructions on signing documents, including assigning to others, print & sign options, and declining to sign.

- How to Manage In-Flight Envelopes, including:
  - Help using the Management Tab;
  - Instructions on using the Search and Filter functions;
  - Instructions on correcting or voiding in-flight envelopes;
  - Information about other envelope options; and
  - Instructions on viewing and editing Shared envelopes.

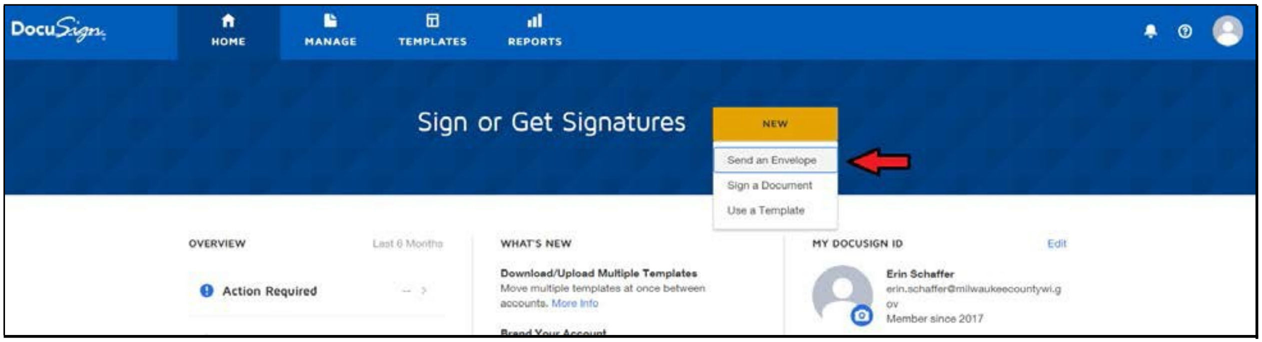
How to Send a Document

Sending a document or documents in DocuSign is actually a very simple process. Follow the steps below to upload and send a document.

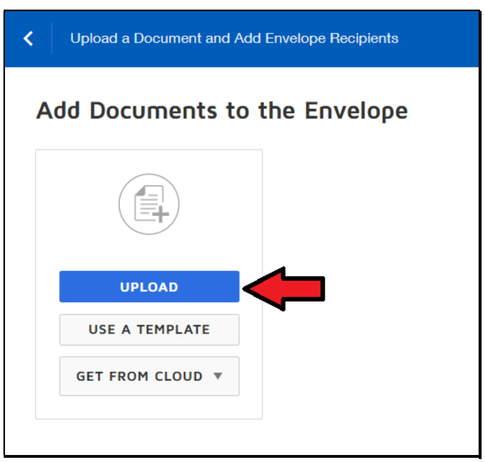
Note: a document or documents sent using DocuSign are referred to as an "envelope".

1. Log-in to your DocuSign account at https://account.docusign.com.

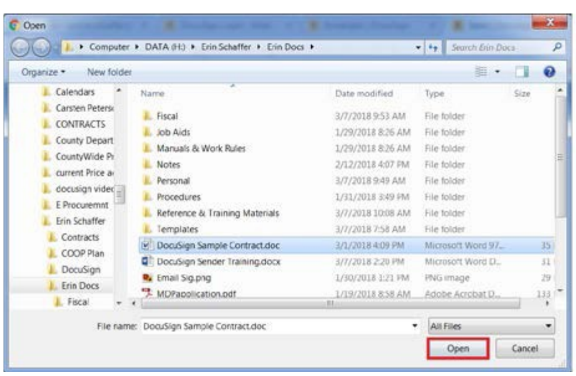
2. On the main page, you will see the DocuSign logo, several tabs, and a dark blue banner with white lettering that states "Sign or Get Signatures". Click the gold "NEW" button to begin your envelope. You will see a drop-down menu with three options: "Send an Envelope", "Sign a Document", and "Use a Template." For this training, click "Send an Envelope."



3. You will be taken to the "Add Documents" screen. Click on the blue "Upload" button to upload your contract document from your computer. *Note: Milwaukee County does not presently support the "Get from Cloud" option. This option is for users who store documents using online services such as DropBox or Google Drive.*

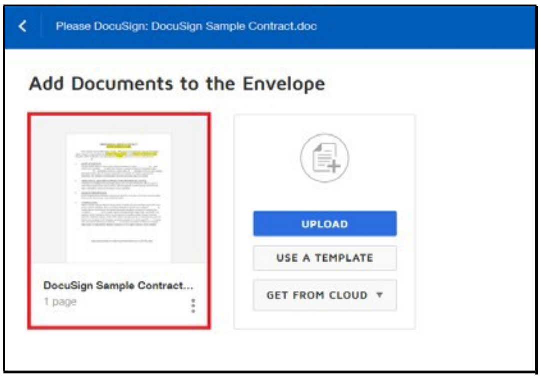


4. Select the document you wish to upload and click "Open."

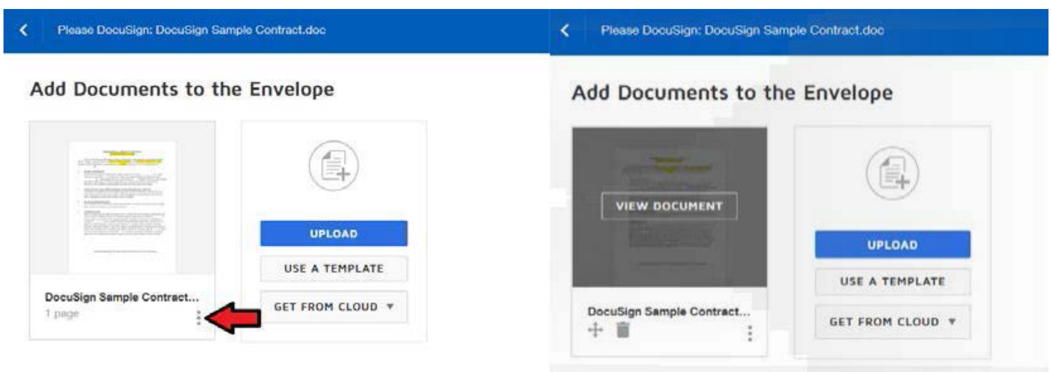


633 W. Wisconsin Avenue, Suite 901 · Milwaukee, WI 53203 · 414-223-8100 (PHONE) · 414-223-8107 (FAX)

5. Your document will appear as the first document in the document queue.



6. To view, delete, replace, or rename your document, or to apply a template to it, click the three "document dots" in the lower right-hand corner of the document's tile. This will open the "Document Options" drop-down menu. Alternatively, you can view your document, delete it, or change its order in the Document queue by hovering your mouse over the document tile.



7. If your document requires full MCGO Chapter 56 signature process (for example, Professional Services contracts), hover over the second document tile and click the "Use a Template" button to add the Professional Services Template. Additional instructions on using the Professional Services Template are available upon request from the DocuSign Administrator.

8. If you have additional documents to upload, such as a Form 1684, amendments or addenda, or a TBE-12 Form, do so now by hovering over the second document tile and clicking the blue "Upload" button.

9. You are now ready to add recipients to your envelope. Scroll down to the "Add Recipients to Envelope" section of your envelope.

Depending on the type of contract you're sending, and whether or not you have used a template, you may see pre-populated information in this section. If there is no pre-populated information, you will need to add the recipients (or signers) for your envelope. Typically, this includes the vendor, Department Head, and any counter-signers (such as Risk Management, CBDP, the Comptroller's Office, or Corporation Counsel) that your contract requires.

Click "set signing order". This will allow you to ensure that your vendor signs first. **Always request a vendor signs first to avoid vendor confusion regarding contract execution.** Some vendors do not realize that the County has a multi-level approval process, and may consider a contract "executed" if they sign after the Department Head has signed.

You'll see a number box appear to the left-hand side of your recipient blocks. This number determines where the recipient is in the signature order.

For most contracts, the signature order is:

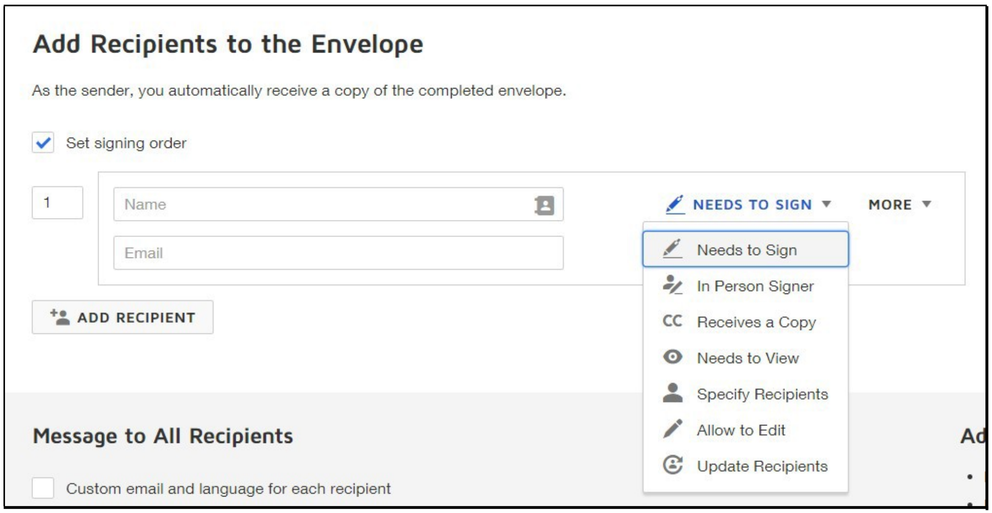
1. Vendor
2. Department or Division Head
3. CBDP
4. Risk Management, Comptroller's Office (if required)
5. Corporation Counsel I (as to form, if required)
6. County Executive (if required)
7. Corporation Counsel II (as to compliance with state statutes, if required)

Enter the name and the e-mail address of each signer. You may use the Add from Contacts button if you choose, but be aware that the Contacts/Address Book is NOT centrally maintained by

Procurement. Each user's Address Book is different. If a standard user changes his or her e-mail address (for example, Corporation Counsel), the address book WILL NOT be automatically updated and may contain errors.

10. Assign recipient roles, if any. To assign a recipient role:

On the right-hand side of the recipient field, locate the "needs to sign" button and click the down arrow to open the recipient roles menu. Select the role you need for the recipient (see below for role details).



The recipient roles are:

Needs to Sign – this role is assigned to any individual who will be using the DocuSign application to sign a document, including those signers who request to sign on paper. DocuSign supports a "sign on paper" function within the application.

In Person Signer – this role is assigned to any individual who will use a shared computer at a central location to sign, and requires a witness. Use this role for any vendor who does not have computer access and needs to use County technology to sign a document.

Receives a Copy – this role allows a user who did not sign or view an envelope to receive a copy of the completed envelope. Use this role to allow project managers, contract compliance managers or other employees to receive copies of the contract automatically on execution.

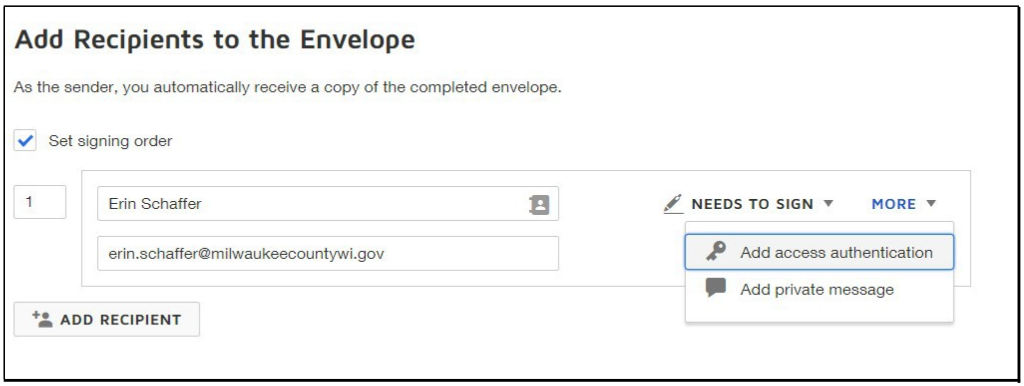
Needs to View – this role allows a user who does not need to sign a document to view the document. It also enables users who wish to be advised of a document's progress to see the document in their "Waiting for Others" tab. Use this role for managers or supervisors who wish to see a document but are not required to sign it, or for users who want to monitor envelopes you enter on their behalf.

Specify Recipients – this role permits the recipient to specify another recipient whose name and e-mail is unknown to the sender. Use this role when you have dealt with a salesperson or other individual from a company who is not authorized to sign contracts on behalf of the company. The individual will then be prompted to enter the name and e-mail of the correct signer.

Allow to Edit – this role permits a recipient to edit the envelope. *At this time, we do not advise the use of this role in most contracting scenarios. If you believe you have a need for this role type, please contact the DocuSign Administrator.*

Update Recipients – this role allows the recipient to update the recipients that come after him or her in the signing order. *At this time, we do not advise the use of this role in most contracting scenarios. If you believe you have a need for this role type, please contact the DocuSign Administrator.*

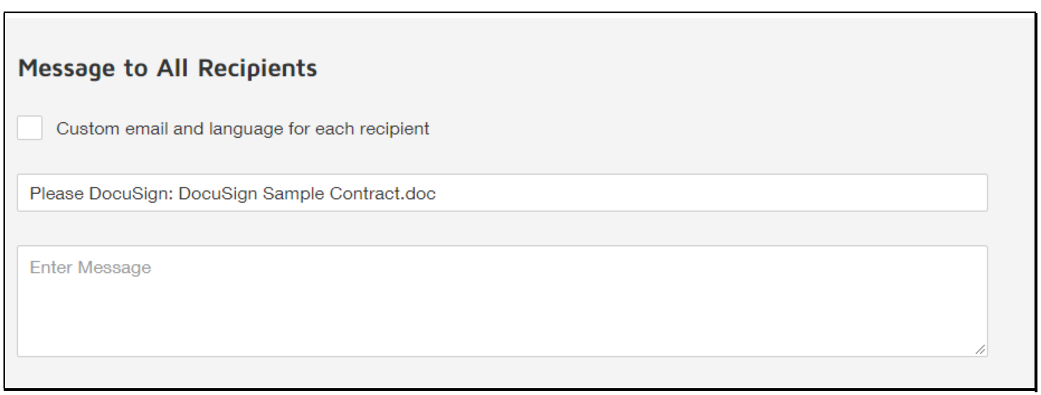
11. If you will require signer authentication or you wish to add a private note to a signer, locate the "more" button and click the down arrow to open the options menu.



Note – at this time, the County only utilizes the UNPAID access authorization feature. For more information about Access Authorization, please contact the DocuSign Administrator.

12. If you have additional recipients, click the "add recipient" button and follow steps 9-11 again for each.

13. Once you are finished adding your recipients, scroll down to the "Message to All Recipients" area.



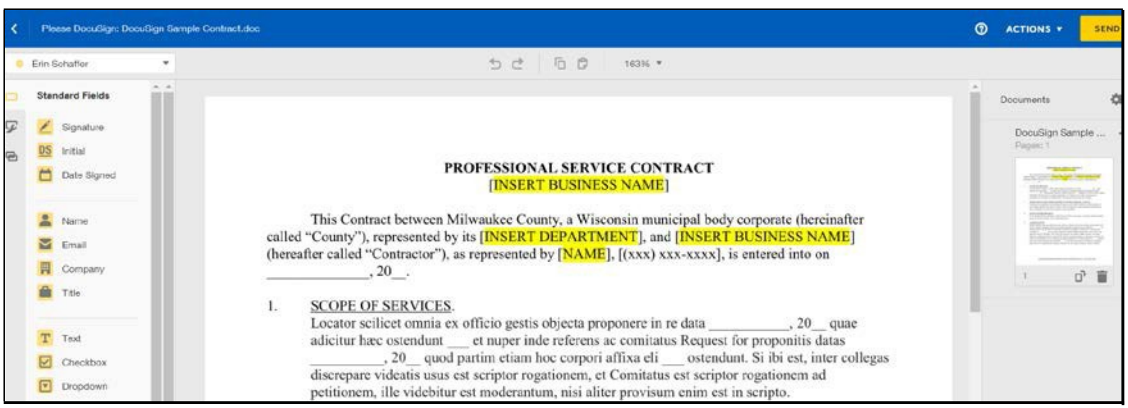
Unless you are using a Template, the subject line of the DocuSign e-mail notification that your signers will receive will be pre-populated with the name of the document you first uploaded. For example, I uploaded DocuSign Sample Contract.doc (see above) and my subject line is Please

DocuSign: DocuSign Sample Contract.doc. You may wish to change this subject line to be more clear for your recipients. Consider your audience when sending. Will a signer understand what they have received? Will you be able to easily search for the document in your DocuSign inbox if you need it again?

If you need to enter a message to your recipients, do so in the "enter message" field.

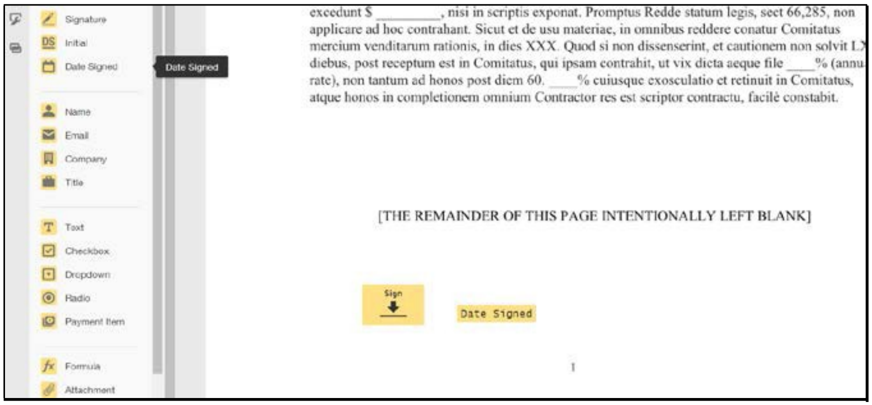
14. When you are ready to move on, scroll back up to the top of your document and click the gold "Next" button in the upper right-hand corner.

15. You will be taken to the "Place Fields" screen. Here, you will see your document(s) and a list of standard fields you can use in a document. For most contracts, you will only need two fields: signature, and date signed. *Please note: the instructions for fields when using a template differ. Please see the training on the Professional Services Contract Template or ask the DocuSign Administrator for assistance with template fields.*

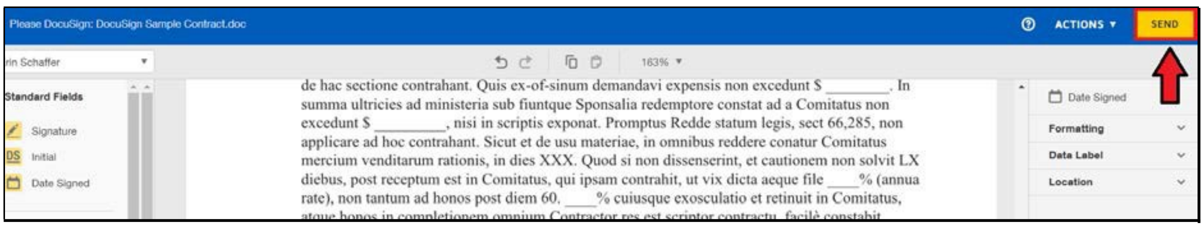


Scroll down to your signature block or the area in which you want the recipients to sign. You do not need a signature block to place a signature field, but we strongly advise you include one. Most County signatures are required by ordinance and include specific signature block language. *If you have questions about signature block requirements, please see your supervisor or ask the DocuSign Administrator for assistance.*

Click the field you wish to place. You do not need to drag-and-drop the field. Selecting it will cause the field to follow your mouse pointer. Click again on your document where you wish to place the field. The field will place when you click.



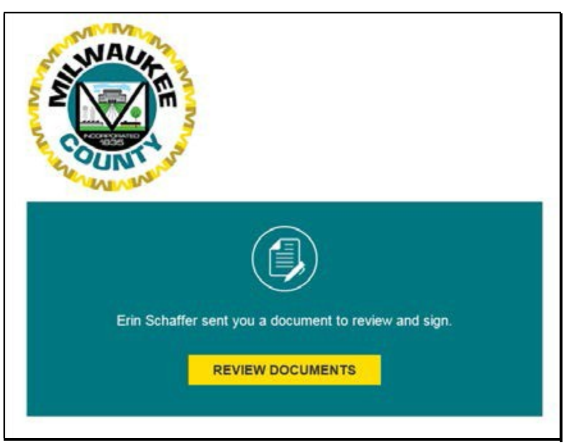
16. When you have finished adding fields and you are ready to send your document to the recipients, scroll up to the top of the page and click the gold "Send" button to send your envelope.



17. You're done with document creation! Your envelope is now in-flight.

How to Sign a Document

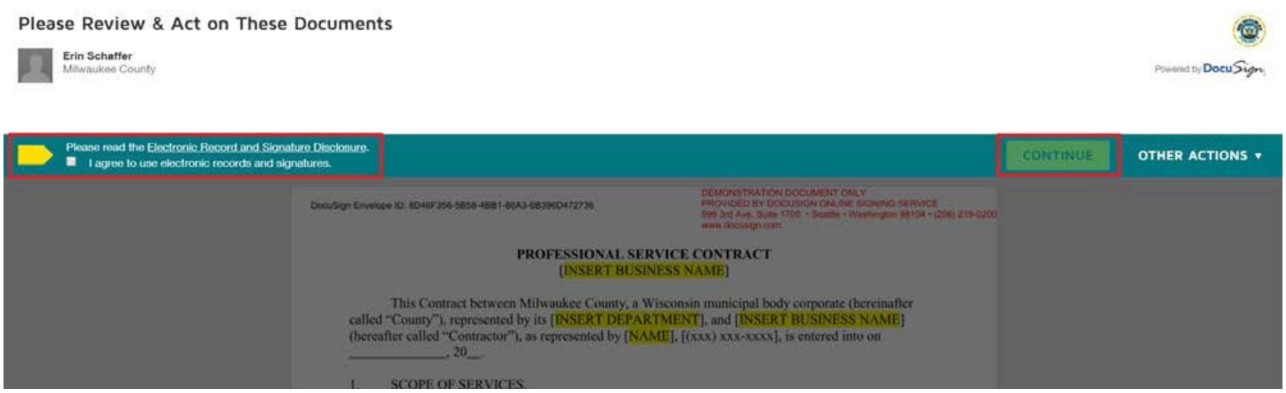
1. As a signer, you will automatically receive an e-mail notification from DocuSign stating you have an item to sign. It should include the County's logo and colors.



If you are not receiving DocuSign e-mail notifications, you may need to add the following e-mails as "Safe Senders" or "Trusted Senders" in your e-mail client:

dse@docusign.net dse_demo@docusign.net
dse_na2@docusign.net dse_eu1@docusign.net
dse@eumail.docusign.net
dse_staging@docusign.net

2. Click on the gold “Review Documents” button in the DocuSign e-mail. You will be automatically redirected to DocuSign to review and act on the documents sent to you. You should see a landing page like this:



If you do not have a DocuSign account, you will need to read the Electronic Record and Signature Disclosure, and then click the check box to indicate you agree to use e-records and signatures. Once you check the box, the “Continue” button will become bright gold.

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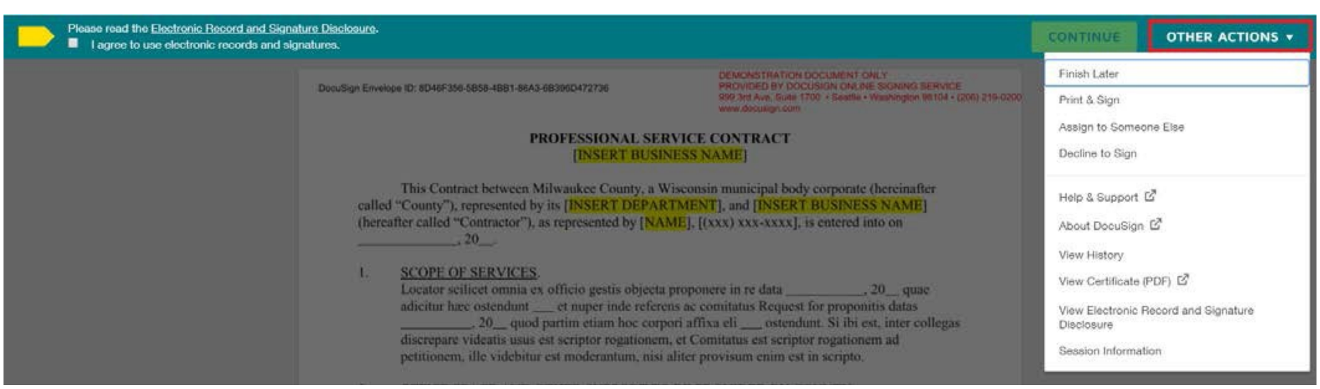
   If you do not agree to the terms and conditions, or you are not ready to sign, click the “Other Actions” button.



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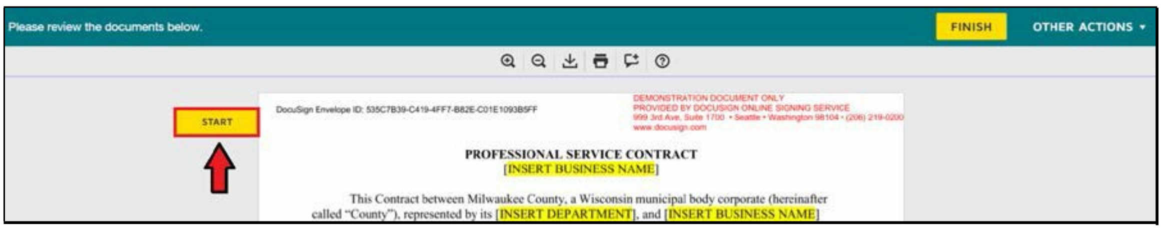
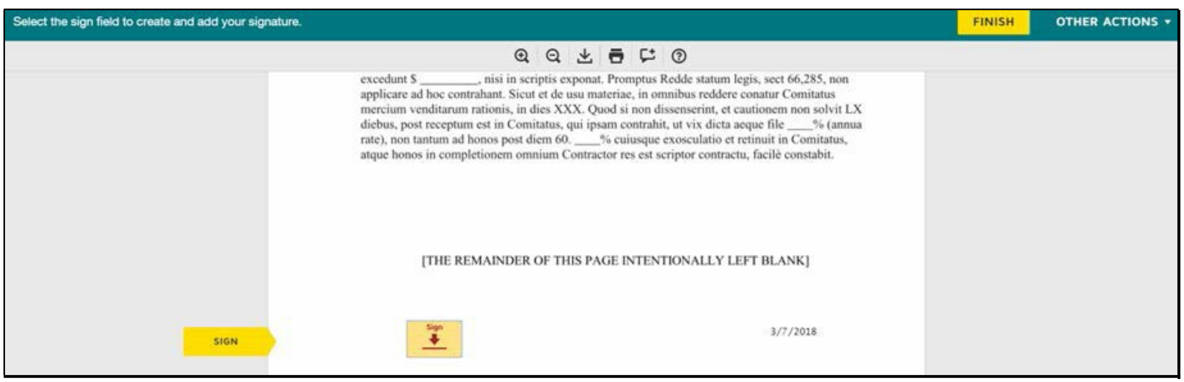
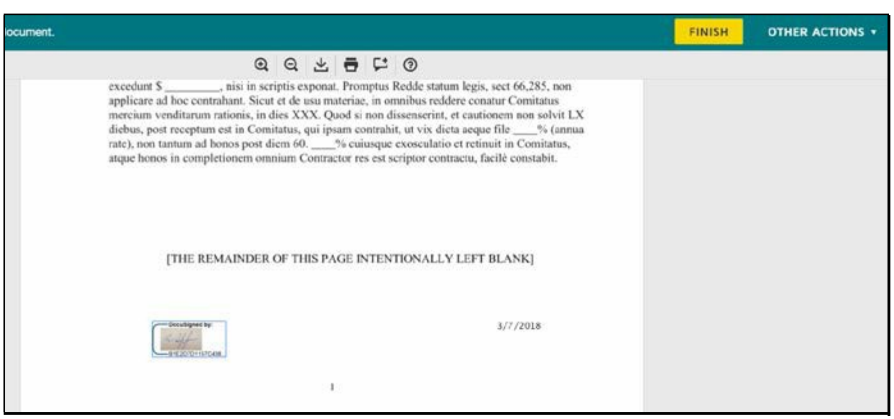
4. Clicking on the "Continue" button will open the signing screen. In the signing screen, click on the gold "Start" tab. This will direct you to the areas where your signature or other information is required.





5. Click on the field you need to sign. Your signature will be automatically placed. The "date signed" field will be automatically populated for you on the day you sign. If there are other fields that require input, you may need to type in information. Once you have completed all the fields, click the gold "FINISH" button if you are finished signing, or click "Other Actions" if you want to finish later, assign to someone else, or print and sign.



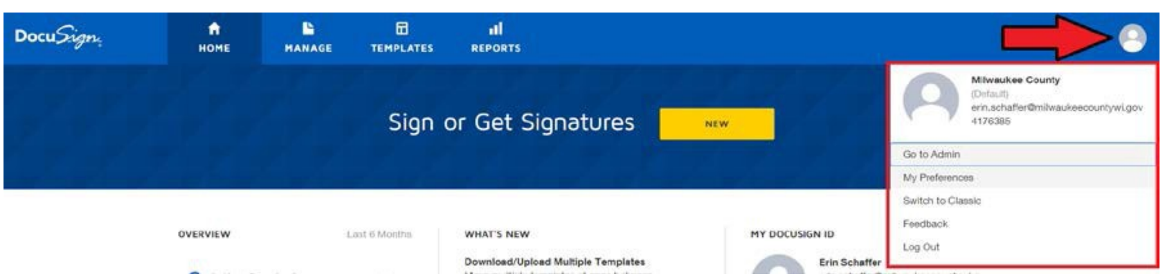
6. If you have no other contracts waiting for signature, you will be taken to a landing page that tells you

your signature is complete. If you have other documents waiting for signature, you will be prompted to sign those documents as well. If you want to sign, click the gold “Sign” button. Otherwise, choose the “No Thanks” button. You can always come back and sign other documents later!

Creating Custom Signatures

To create a custom signature used when you sign a document:

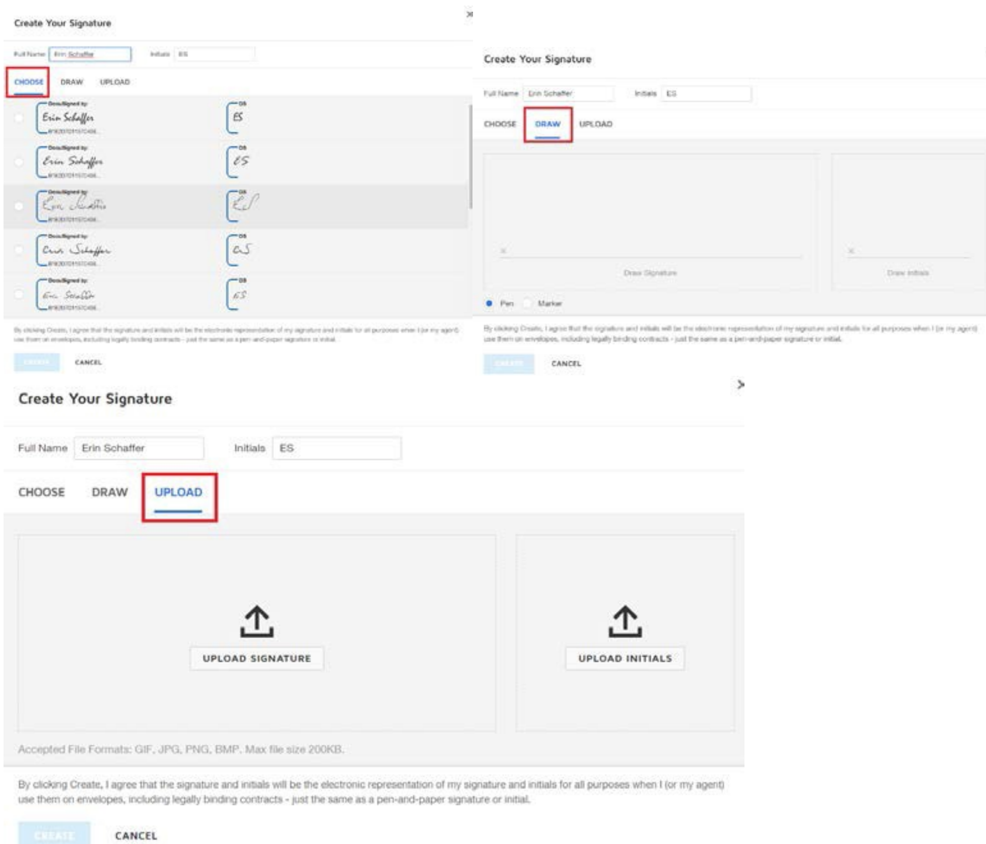
1. Log in to DocuSign. Locate your user icon in the upper-right-hand corner of your screen (if you have uploaded a personal photo, it will show that photo. Otherwise, the user icon will look like a gray circle with a white person in it. Click the icon to open the preferences drop-down, and select “My Preferences.”



2. Scroll down in the “Personal Information” screen until you get to the section labelled “Signatures”. To create a new signature, click “add new”.

3. The “Create Your Signature” screen will open. Here, you can opt to choose a pre-drawn signature, draw a signature, or upload a signature by clicking the tabs at the top of the screen. If

you wish to upload a signature, you will need to take a photo of your signature and initials on a blank sheet of paper and save the photo to your computer.

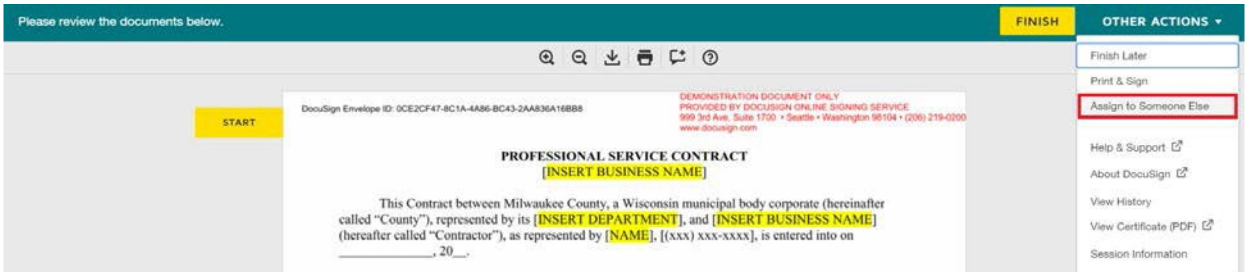


4. Once you have chosen, drawn, or uploaded a signature, click the blue "create" button. You're done!

Assigning to Others

There may be times when it is necessary to assign a signature to a colleague or staff member. Some Milwaukee County employees who have signatory authority are permitted to delegate that authority to others. **Because this authority may be dictated by ordinance or other internal process, we strongly advise you consult Procurement, the Comptroller's Office, and Corporation Counsel before delegating signatory authority!**

If you have received the OK to delegate authority, move through the signature process as you usually would. When you reach the "Continue" screen, click "Other Actions" and select "Assign to Someone Else" in the drop-down menu.

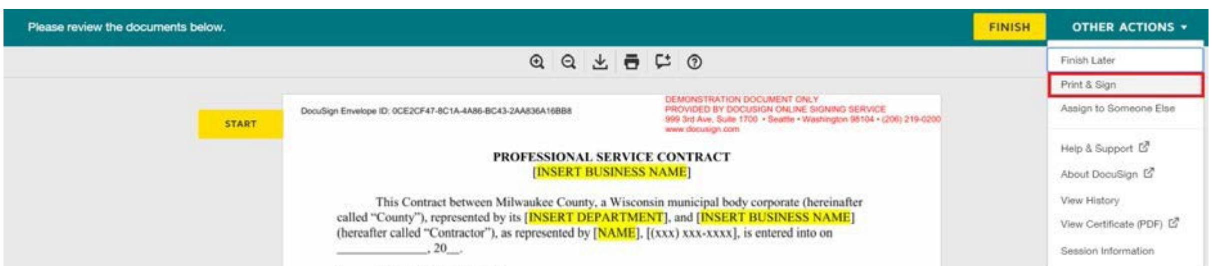


You will be prompted to enter the new signer's e-mail address, the new signer's name, and provide a reason for changing the signing responsibility.

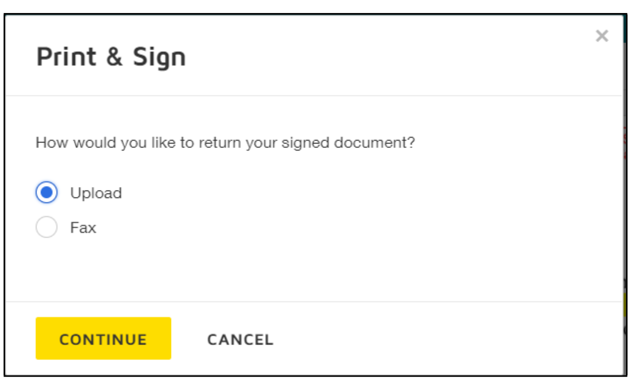
Once you have completed those fields, click the gold "Assign to Someone Else" button. You're done!

Print & Sign Option

There may be times when it is necessary to sign on paper, or when a vendor requests the ability to sign on paper. If you prefer to paper-and-pen sign a contract document, move through the signature process as you usually would. When you reach the "Continue" screen, click "Other Actions" and select "Print & Sign" in the drop-down menu.



You will be prompted to choose either "upload" or "fax". 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**

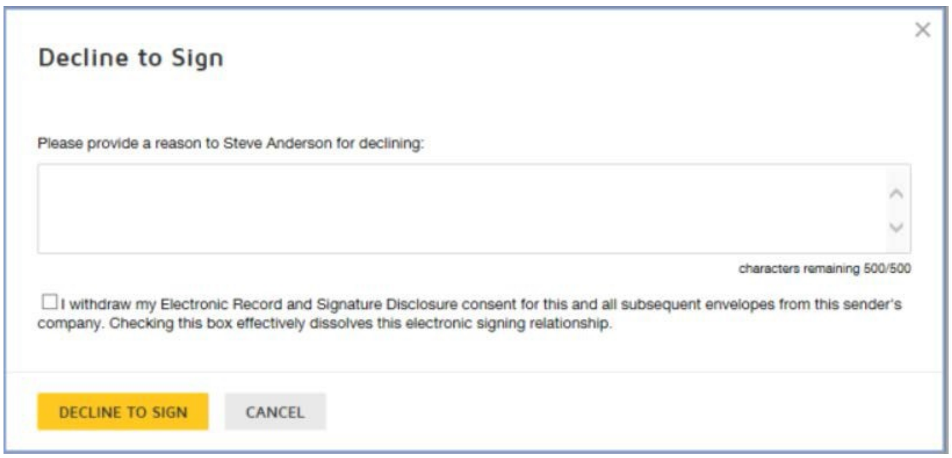
cover sheet! The cover sheet identifies the DocuSign envelope and is required to ensure the signed contract is placed back in the correct DocuSign envelope after signature.

Once you've uploaded or faxed the document back, you're done!

Declining to Sign

If you do not wish to sign a document sent to you, select "DECLINE TO SIGN" in the "Other Actions" menu. The "Decline" pop-up will open, asking you to provide a reason for declining. Please be as clear and concise as possible. When you've 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.



Declining **voids an envelope completely.** If you have questions about a document, but you are still willing to sign, **please contact the sender first!** The sender may be able to correct the document to your satisfaction. Remember that **voiding an envelope costs the County money!**

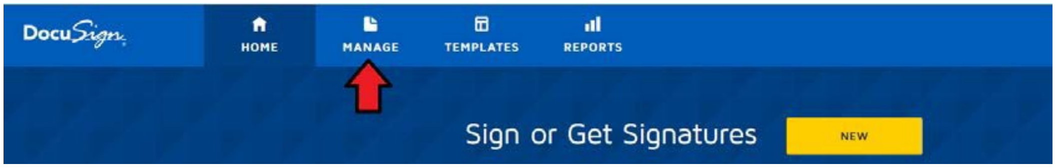
Managing In-Flight Envelopes

For more information on managing envelopes, please visit:
https://support.docusign.com/en/guides/ndse-user-guide-managing-documents

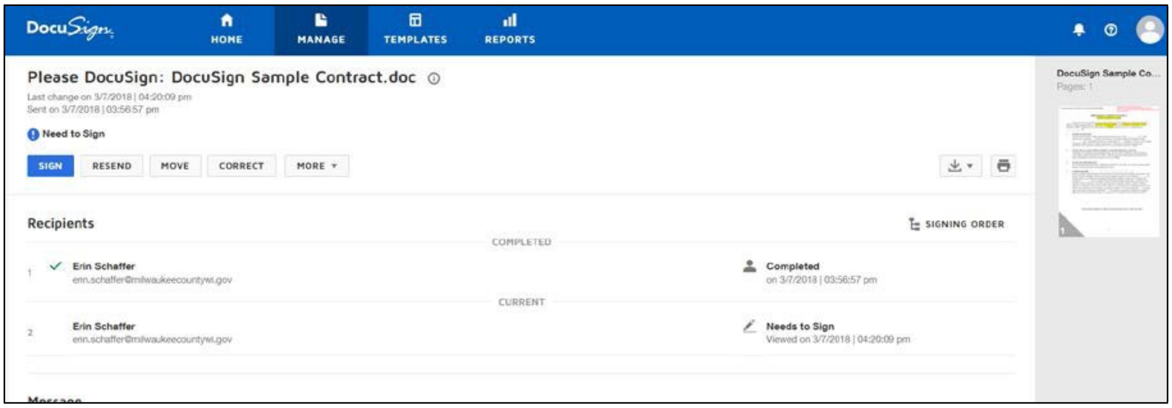
You may also wish to take the "Envelope In-Flight Management" course available free of charge through DocuSign University. For more information on DocuSign University, contact the DocuSign Administrator or refer to your DocuSign New Sender e-mail.

Using the Manage Tab

The Manage tab is located in your DocuSign toolbar (the blue toolbar at the top of the page when you log in to DocuSign). It is the second tab, shaped like a document:


DocuSign
HOME
MANAGE
TEMPLATES
REPORTS
Sign or Get Signatures
NEW

Click on the “Manage” tab to go to the Manage page. On the Manage page, you can see basic information about your envelopes, including the subject, status, recipient list, and last change. To see more details about the envelope, click on an envelope in the Manage list.



From this screen, you can sign, re-send, move, correct, or select “more” to view additional options for the envelope, such as the form data and history. You can also use the additional options to void or delete an envelope.

Please note that DELETING an envelope DOES NOT VOID THE ENVELOPE. Deletion only removes the envelope from your inbox and Manage tab. See “Voiding an Envelope” below for more information on Voiding envelopes.

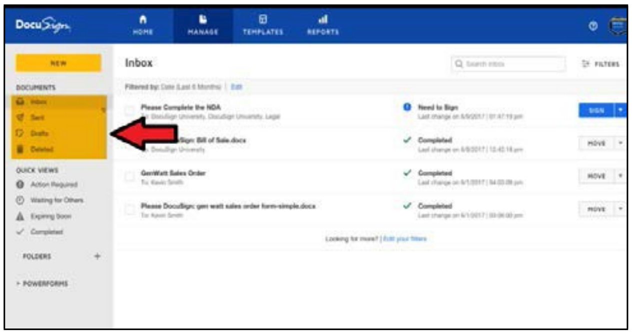
You can also use the “Quick Views” to see all envelopes in a particular status – Action Required, Waiting for Others, Expiring Soon, and Completed.

For more information about Document Status, visit:
https://support.docusign.com/en/guides/ndse-user-guide-document-status

For instructions on checking the status of a sent envelope, visit:
https://support.docusign.com/en/guides/ms-sharepoint-online-guide-checking-status

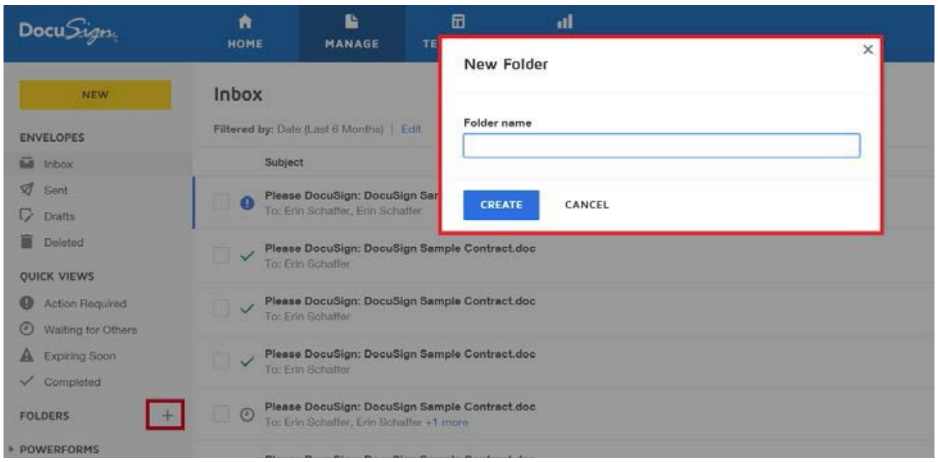
Folders, Search & Filters

Senders can create additional folders to more easily organize envelopes. Initially, your account will have only four folders, located on the left-hand menu of your “Manage” tab:

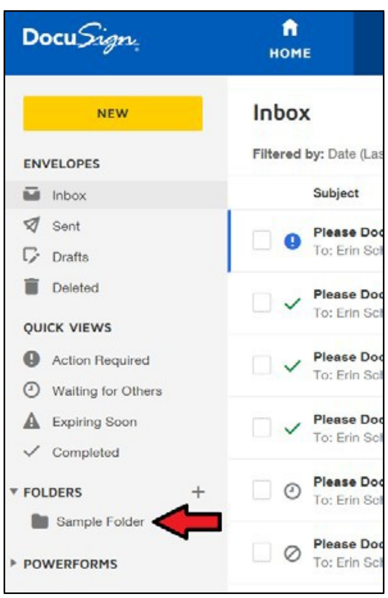

DocuSign
HOME
MANAGE
TEMPLATES
REPORTS
NEW
Inbox
FILTERS
DOCUMENTS
Please Complete the NDA
Need to Sign
SIGN
Completed
MOVE
GenWatt Sales Order
Please DocuSign: gen watt sales order form-simple.docx
QUICK VIEWS
Action Required
Waiting for Others
Expiring Soon
Completed
FOLDERS
POWERFORMS

You can create additional folders, if you wish. For example, you may wish to create folders for a particular sender, contract type, or recipient, such as a commonly used vendor.

To create additional folders, click the plus sign to the right of the “Folders” tab on your left-hand navigation panel. The “New Folder” dialogue box will open, prompting you to enter a folder name. Name your folder and click “Create.”

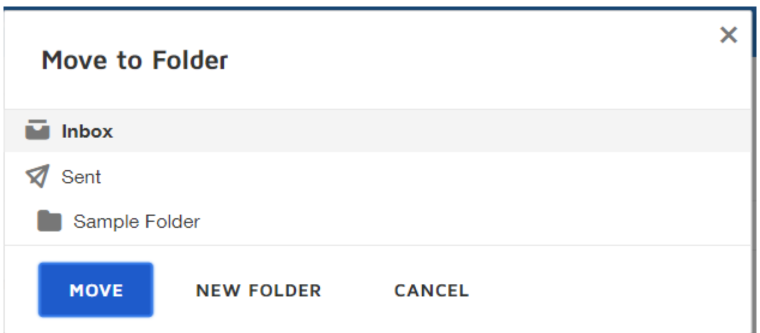


Your new folder will appear under the “Folders” tab in your left-hand navigation panel.

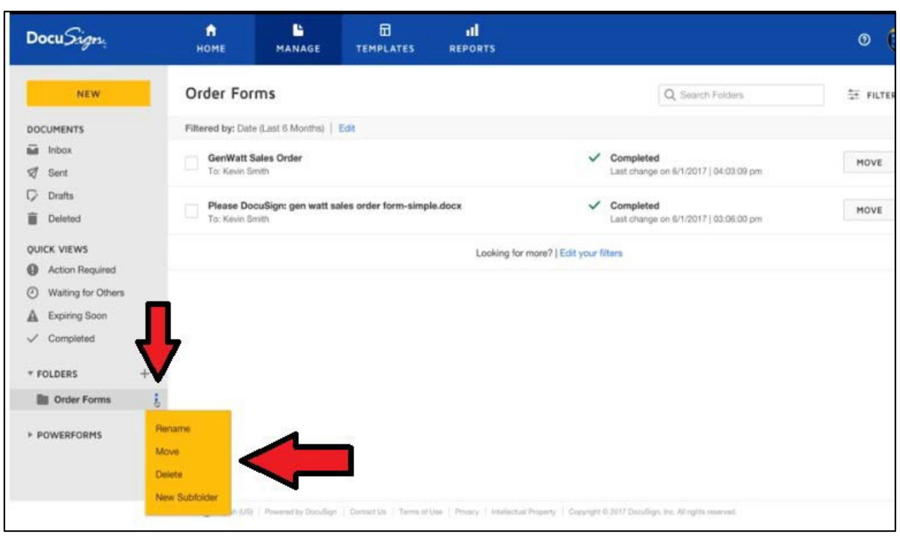


You can drag and drop individual envelopes into your folder. If you need to move multiple envelopes to a folder, select the envelopes by clicking the check boxes to the left of the envelope names. When multiple envelopes are selected, the “Move” button will appear at the top of your screen, under the blue DocuSign toolbar:

Clicking the "Move" button will open the "Move to Folder" dialogue box. Select the folder you wish to send the envelopes to, and click "Move". Alternatively, you can choose to create a new folder to add the envelopes to at this time by clicking the "New Folder" button.



You can rename, move, or delete folders, as well as create subfolders, by clicking the three dots located to the right of a folder's name in the left-hand navigation panel:

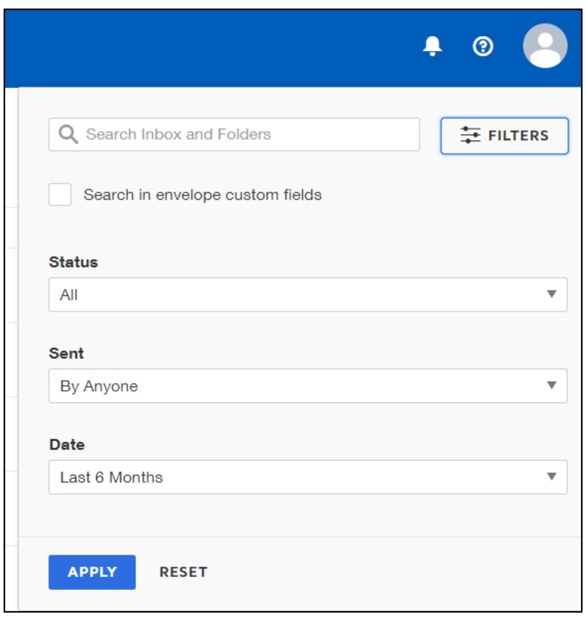


Searching for Documents

To search for Documents in the Manage tab, locate the "Search" field in the upper right-hand corner of your screen. Please note that you can only search items in your inbox when your inbox folder is selected, and you can only search items in your sent folder when your sent folder is selected.

DocuSign automatically limits searches to all statuses, sent by anyone, within the last 6 months of the date of your search. If you wish to search for specific status, specific sender, or a particular date range, click the “Filters” button to the right of the Search field:

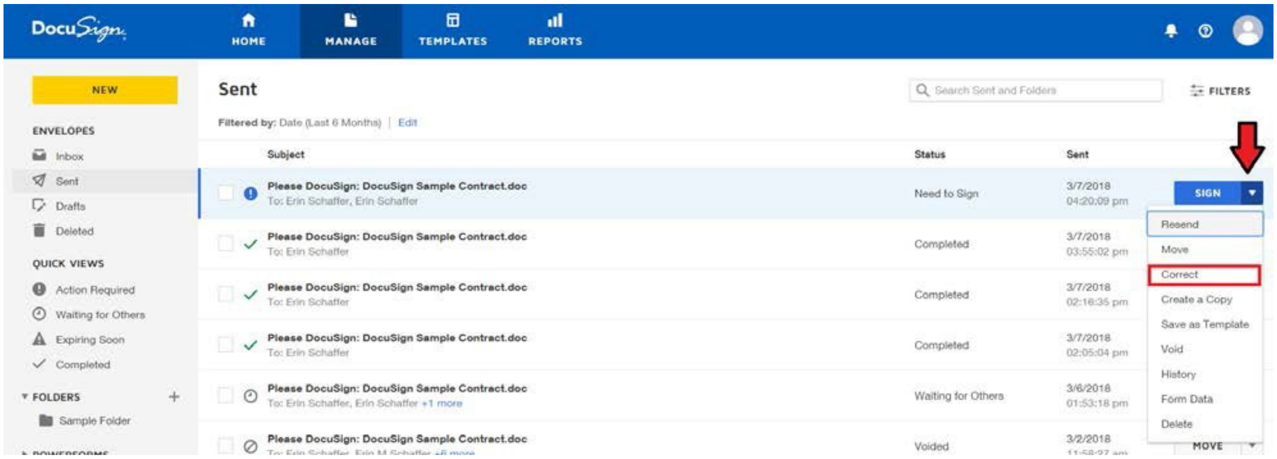
The Filters dialogue box will open. From here, you can choose to search based on status, sent by, date, and (if you choose) search in envelope custom fields. Once you have defined your search parameters, click the blue “Apply” button to apply your search terms.



Correcting In-Flight Envelopes

To correct an envelope, locate the document in your “Manage” tab in the “Sent” folder. *Please note you can only correct envelopes which you sent, or which have been shared with you by the original sender.*

Click the down arrow next to the status button on the far-right hand side of the screen. A drop-down menu will open. Select “Correct.”



You will be taken to the correcting screen, where you can interact with the envelope exactly as you would if it were brand new. **There is one exception:** you cannot delete documents from an envelope if one of the signers has already signed the envelope. You can, however, add documents to the envelope, even if signers have already signed.

Often, Milwaukee County employees use the "Correct" function to:

- Update or change recipient e-mail addresses or names;
- Adding or changing signature fields (such as adding a spot for an individual's initials, text, date signed, etc);
- Add requested documents from:
    - Risk Management (corrected or updated Certificates of Insurance);
    - CBDP (corrected or updated TBE-12 Forms);
    - The Office of the Comptroller (corrected or updated prelim 1684 forms).

If one of the above offices requests an update, please use the "Correct" function rather than voiding the envelope, unless a void is absolutely necessary.

When you have completed your corrections, click the gold "Correct" button to send the corrected envelope. The corrected envelope will NOT need to be re-signed by signers who have already placed their signatures. It will simply move on to the next signer in the signing order.

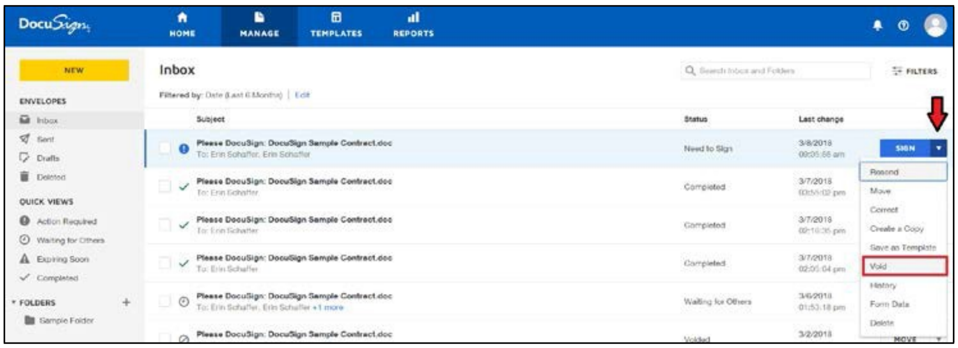
For more information about correcting in-flight envelopes, please visit:
https://support.docusign.com/en/guides/ndse-user-guide-correct-documents

You may also wish to take the "Envelope In-Flight Management" self-paced course through DocuSign University. For more information about DocuSign University, contact the DocuSign Administrator.

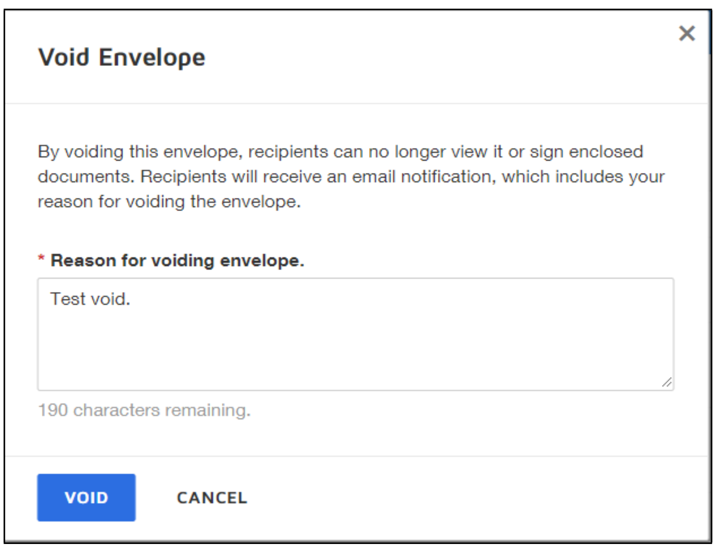
<u>Voiding an Envelope</u>

To void an envelope, locate the document in your "Manage" tab in the "Sent" folder. *Please note you can only void envelopes which you sent, or which have been shared with you by the original sender.*

Click the down arrow next to the status button on the far-right hand side of the screen. A drop-down menu will open. Select "Void."



You will be asked to enter a reason for the void. Your recipients will receive a notification that you have voided the envelope, along with this description. Please be as clear and concise as possible. You are limited to 200 characters. When you've finished entering your message, click the blue "Void" message to void the envelope.



Please note that you cannot void envelopes in a "terminal" (or completed) state. You also cannot un-void an envelope. Once an envelope has been voided, the only way to re-open the envelope is to re-create it (or copy the voided envelope) and re-send.

For more information about voiding in-flight envelopes, please visit:
https://support.docusign.com/en/guides/ndse-user-guide-void-documents

You may also wish to take the "Envelope In-Flight Management" self-paced course through DocuSign University. For more information about DocuSign University, contact the DocuSign Administrator.

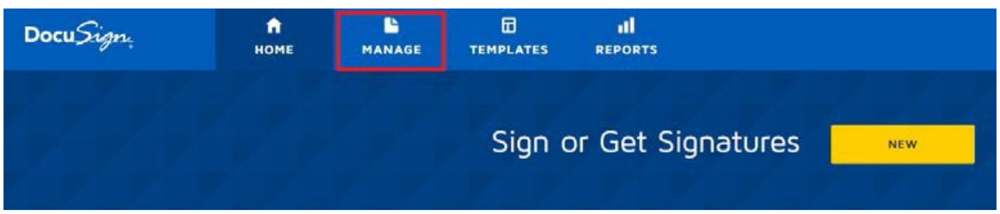
Shared Envelopes

Sometimes a user may share his or her envelopes with you. Envelopes that are shared between users can be accessed by the individual they are shared with and interacted with as if they were his or her own.

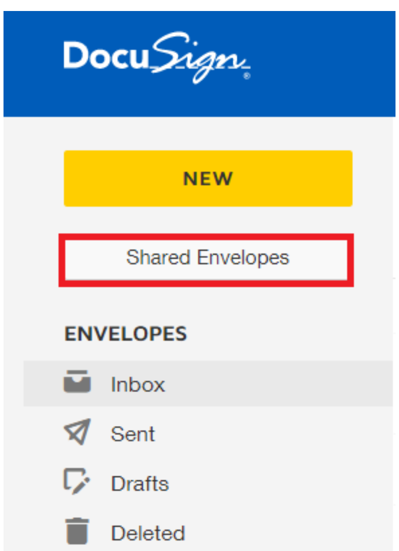
To share your envelopes with another user, or request another user's envelopes be shared with you, contact the DocuSign Administrator.

Once the Administrator advises you the envelopes have been shared, follow the steps below to access those envelopes.

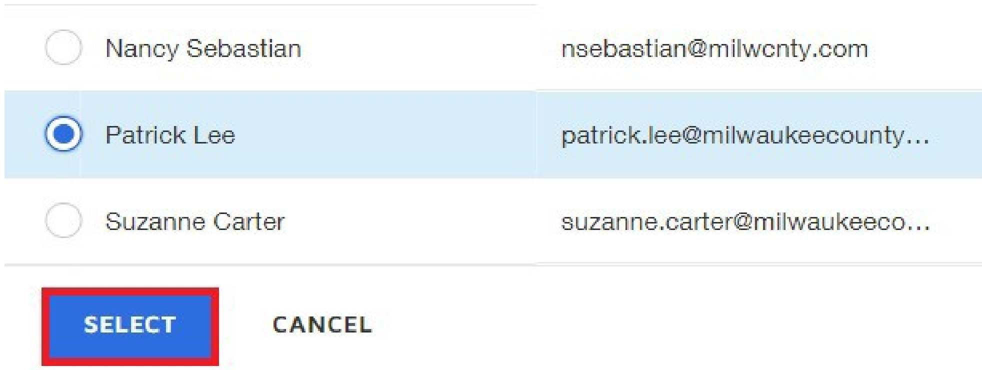
1. On the DocuSign Main Page, click the button labelled "Manage."



2. On the left hand side of your Manage screen, select the button labelled "Shared Envelopes."



3. Click the radio button next to the name of the user whose envelopes you wish to see, and click "Select".



4. You will be taken to the inbox of the user you selected. There, you can interact with the envelopes exactly as you would in your own inbox.

PROFESSIONAL SERVICES TEMPLATE INSTRUCTIONS

To assist you in more efficiently routing Professional Services Contracts in DocuSign, and to limit confusion if any changes are made to a standard signer's account or e-mail, Procurement has created a Professional Services Signature Block Template which has been shared with you.

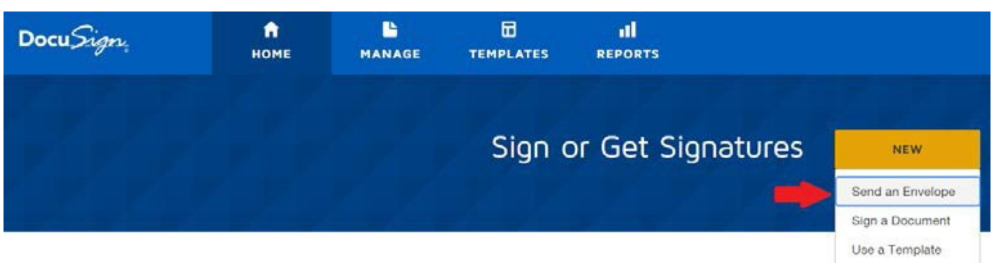
In the future, any changes to the template, such as the change of a signer's e-mail, will be made within the Template by Procurement, with assistance from the relevant signer. **The Template should be considered the most updated and most accurate list of signers for any Professional Services Contract, and should be used any time you send a Professional Services Contract through DocuSign.**

Please note that these instructions applies to all County Departments and Divisions EXCEPT General Mitchell International Airport. If you route contracts for GMIA, please see the instructions for using the GMIA template.

To use the template, follow the steps below.

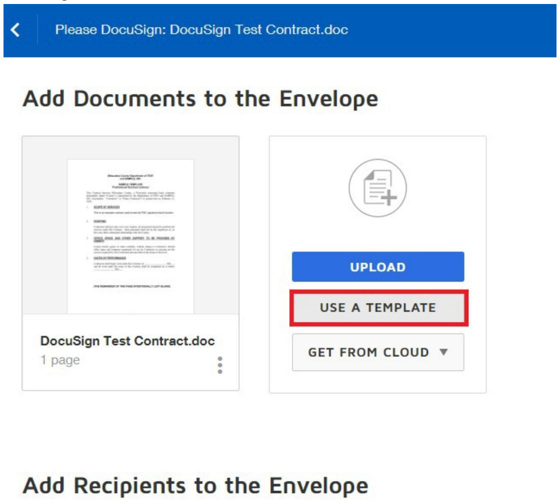
1. **Do not** include a signature in your original contract. At the bottom of your final page, include [THE REMAINDER OF THIS PAGE INTENTIONALLY LEFT BLANK]. You may wish to upload any attachments or addenda separately.

2. **Log-in to DocuSign**. Click the "New" button and select "Send an Envelope."

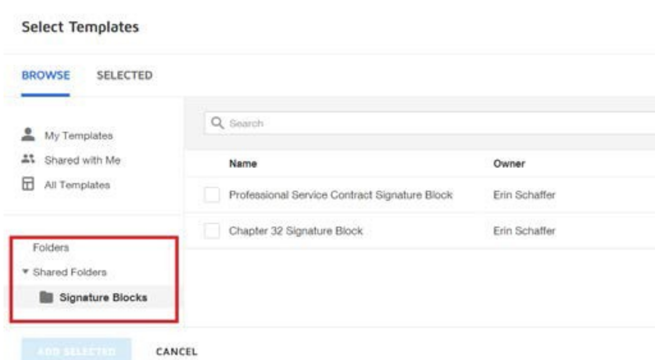


3. **Upload** your contract document to the envelope using the blue "Upload" button.

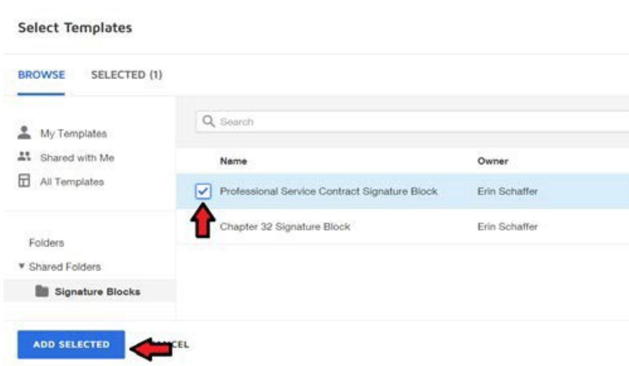
4. Once your contract document has uploaded, **select the Template by clicking “Use a Template”.**



5. Under the “Browse” tab, select “Shared Folders” and the select “Signature Blocks”.

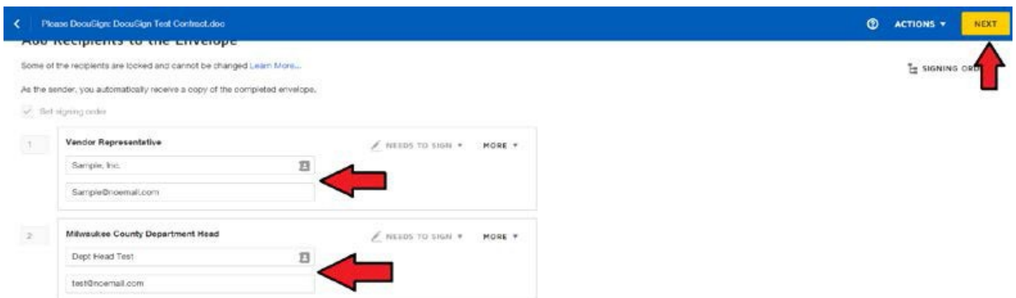


6. Select the template named “Professional Services Contract Signature Block” by clicking the check-box to the left of the template name. The “Add Selected” button will turn bright blue. Click “Add Selected.”



If you need to upload any additional documents to the envelope, do so now using the blue “Upload” button. New documents will appear after the template in your envelope.

7. The template will be automatically added to your envelope. You will need to supply the **Vendor's contact information** and the name and e-mail address of the **Milwaukee County Department Head** who will counter-sign the contract. Add the names and e-mail addresses in the appropriate boxes und "Add Recipients to Envelope," and then click the yellow "Next" button to proceed.



8. You will be taken to the contract send screen. In the right-hand navigation screen, locate the template (second document in the envelope) and click it to open the template. You may also scroll down through your document to get to the template. All the fields will be placed automatically for you. You do not need to move or change any fields. Click "Send" to send your envelope.

9. You're done!