

eSignature FAQ's

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Getting Started:

How do I sign-up to be a Sender?

Sign-up to be a sender by going to my.osu.edu and selecting eSignature from the menu bar. Select the “Request for eSignature Sender privileges” link. From there you will be asked to accept Terms and Conditions and take the required training. In addition, your request will be validated with your supervisor.

How do I sign-up to be an Author?

Users can sign-up to be an author by sending an email to access@osu.edu. Access will get approval from the appropriate college / VP authority and the B&F business sponsor to be granted “Author” access. From there you will be asked to accept Terms and Conditions and take the required training. You must first complete all of the Sender steps before becoming an Author.

Do people who sign documents need an eSignature account?

No, only people who send documents out for signature require a DocuSign account. All OSU faculty, staff and students will have a DocuSign account. Other individuals may desire a personal DocuSign account (free, just sign up on the website) to keep track of documents that they’ve signed.

Where should Signers store their copies of signed documents?

We ask that you download your completed documents (both Certificate of Completion and Document) and store them in accordance with the record retention policy and your departmental guidelines. In the future we plan on moving all eSignature documents into EDM.

Does eSignature have a storage limit or storage capacity?

Our DocuSign partners have provided us with ample storage at this time. They have built a fully elastic, scalable storage model that they routinely monitor. In addition, they recently added 5 petabytes of storage for future growth.

When is training available and what is in the training?

Training will be available starting September 14, 2015. Training will consist of the Sender and Author Roles and include links and information related to the Policy, ADA Compliance, and Data Security.

How will Training be delivered for eSignature?

Training will be delivered via BuckeyeLearn. Direct links can be found below:

Sender Training: [eSignature Sender](#)

Author Training: [eSignature Author](#)

Creating / Modifying Templates:

What do I do if I have problems uploading a document to DocuSign?

“Fillable form” and “Active XFA Form” PDF files, will not upload properly for use with DocuSign. To work around this difficulty, fill out the form in Adobe Acrobat and print it to a PDF file (can be chosen from the *Print* menu in Acrobat). Then, upload the “printed” file, which will work with no problems.

PDF files larger than 5MB are generally not safe for use with DocuSign. In Adobe Acrobat Pro, you can do a *Save As* and save the file as a *Reduced Size PDF* or as an *Optimized PDF*, both of which will allow you to reduce the file size.

Can I change the default notifications that I am getting from DocuSign?

The default notification for envelope status produces a lot of email. It is possible to reduce, or even eliminate, these notifications. To change the default notifications, you will need to go to the *Preferences* screen, under the *Manage Email Notifications* tab and change your notifications to meet your specific needs.

What do I do if I want to make a change to a standard form or template?

Standard forms or templates should not be changed. If you have a recommendation, please contact the form owner. Form owners are responsible for making any changes.

What do I do if a PDF is rejected by DocuSign when preparing a Template?

1. Open the PDF file in Acrobat
2. Click the *Print* icon
3. Select the *Adobe PDF* printer
4. Click *Print*
5. When prompted, save the new PDF file
6. Upload this new PDF file to DocuSign, it will be accepted

If I am a Sender and I need to route an envelope to a 3rd person, does that line need to be in the template?

Yes. The Template should include every role needed for a Sender to use as is.

What does access code mean on the Template Form?

Access codes are required when sending a document that will include restricted data or when sending a document to someone that is external to the university. Please use either the access code or the SMS option. Full details on how to use access codes is available in the following links:

Access Code: <https://support.docusign.com/guides/cdse-user-guide-signing-access-code-authentication>

SMS Code: <https://support.docusign.com/guides/cdse-user-guide-signing-sms-authentication>

What is a tag?

DocuSign tags are used to indicate locations on a document where the recipient needs to take an action and to provide information for the recipient. Some examples include: Signature, Date Signed, Radio Button and Check Box. More information can be found: <https://support.docusign.com/guides/cdse-user-guide-docusign-tags-docusign-tags>

How do we make a template ADA Compliant?

Instructions can be found in the Author Training: [eSignature Author](#)

What happens if we were unable to complete the Template Review by 9/1?

Any templates that you are unable to review prior to 9/1 will be available in the Demo environment: Demo.DocuSign.com, for a period of time, until the Template review is completed. Simply log into the Demo instance and complete the template review and then the template will become available again.

Will all future templates be reviewed?

Authors are required to follow the new guidelines when creating templates. In addition, periodic reviews will be completed where any template can be randomly selected for review.

Can a Template owner be changed?

Yes. Users can send a request through Service Now and ask for the eSignature administrator to change ownership of a Template. This is especially beneficial when someone leaves the University or goes on extended leave. *Note:* Make certain to state the Template Name, original Template owner and who should be the new owner when completing the Service Now request.

How will Template sharing work?

Authors will share templates with Senders and other Authors as needed to create efficiencies.

Is there a naming convention for templates?

Yes. Template names should begin with the abbreviated College / VP unit (ASC, EHE, B&F, etc.) and then the form name.

Can we upload PDF's and attach tags to them?

Authors will be able to upload PDF's and attach tags to them. However, Senders will not.

Sending Envelopes:

How do I prevent documents from being returned incomplete?

The best way to prevent a document from being returned incomplete is to make all of the fields required where you are expecting input from a signer(s). The envelope will not be able to move forward until all required fields are completed by each signer.

Can I send a document to someone outside of the University?

Yes. However, it is required that you use Two-Factor Authentication when sending a document to someone outside of the University. DocuSign offers Access Codes and/or SMS Codes to meet this requirement.

Can I send the same document to many individuals at once?

If you need to send a single document to many individuals, you can use the *Add Bulk Recipient* button on the *Send* screen. It works very similarly to a Word mail-merge. You will be prompted to upload a CSV file containing the data to merge into the document. It is best to prepare such documents in advance and upload them as Templates from the *Manage* screen, because you need to place the tags and name them with the same names as the headers in your CSV file. Full details on bulk sending is available in the [DocuSign Service User Guide](#)

Can I send the same document again?

It may be desirable to re-send an envelope that was sent previously. This is especially useful for envelopes that expired before they were completed, or for sending nearly the same envelopes out to several different recipients. To send an old envelope again, select the old envelope from the *Manage* screen, then pull down the *Actions* list and select *Clone*. The original envelope settings and documents will appear. Make any necessary changes and *Send* the envelope.

Signing:

How will non-employees sign a document I route to them?

Non-employees will sign a document the same way they do today. However, it is required that you use Two-Factor Authentication when sending a document to someone outside of the University. DocuSign offers Access Codes and/or SMS Codes to meet this requirement.

Why is it that some recipients do not see the invitation email for them to sign?

If the recipient doesn't see the email inviting them to sign, try the following steps:

1. Have the recipient check their spam filter and deleted items for a message from dse@docuSign.net. Invitations that are forwarded to another service may be considered spam.
2. If the recipient receives their mail on a service other than OSU's (such as Gmail), obtain their email address on the service where they read their mail, and correct the envelope to use that address. This skips the forwarding and will avoid problems with most anti-spam systems.

Policy:

Can I share my inbox and sent folder with individuals on my team so they can see and act upon my folders when I am out of the office?

Yes. DocuSign has a sharing feature that allows other users to see and act upon your folders as well as you having the ability to see and act upon other user's folders. Simply make a request to 8help providing the name of the individuals you want to share with. Please be aware that when you share your inbox, you are sharing *all* documents in your inbox.

Will OSP accept electronically signed documents now?

Yes. All units must accept electronic signatures as of September 1, 2015, unless prohibited by policy.

Can we get a copy of the Policy?

Yes. The eSignature Policy is available at the bottom of the DocuSign Home Tab (Look for - eSignature Policy) and the University Policy website.

How will Authors be approved, is there any specific criteria?

Authors should be aware of the requirements associated with private and restricted data, the delegation authority in their College/VP unit, and the electronic signature policy.

Will all University Forms be available in eSignature?

The form owners will assess whether eSignature is the appropriate place for the documents to be housed. The timeline will be determined by the form owner.