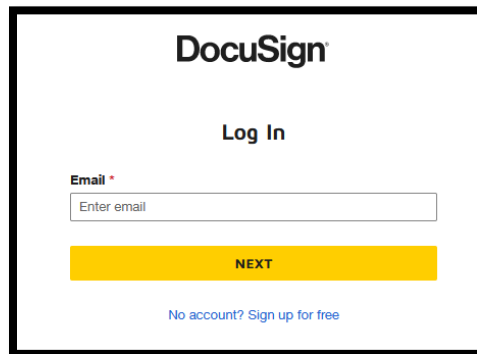


DocuSign Sender

DocuSign is an electronic signature application that was recently acquired by the College for electronic documents and eSignatures.

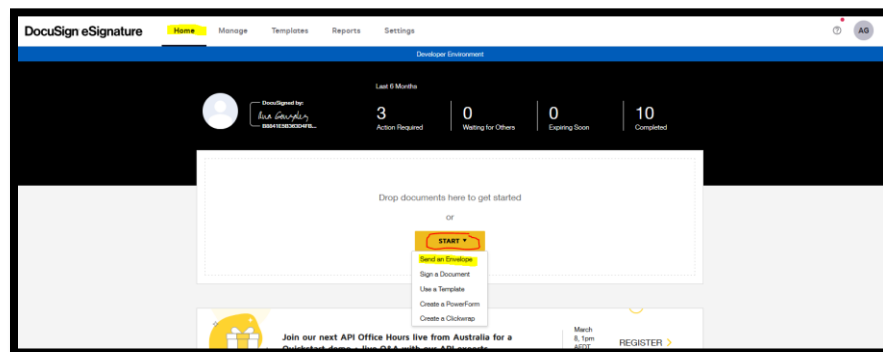
1. In order to send documents through DocuSign you will need to be granted access as a “DS Sender”, Contact Mr. Rodolfo Roman via e-mail cc your supervisor and request access for DS sender at rromanve@southtexascollege.edu.
2. Once you have been granted access you will Log into [DocuSign](https://app.docusign.com/) using your South Texas College e-mail then click next. **Please save link for future submissions. <https://app.docusign.com/>**



The image shows the DocuSign Log In interface. At the top, it says "DocuSign" and "Log In". Below that is a form with a label "Email *" and a text input field containing "Enter email". A yellow button labeled "NEXT" is positioned below the input field. At the bottom, there is a link that says "No account? Sign up for free".

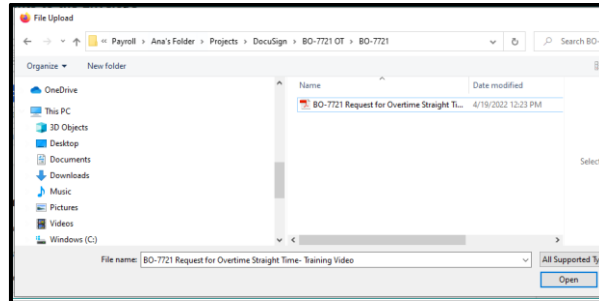
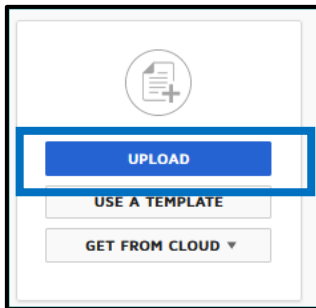
3. Once logged in, you can send an envelope by clicking “Start” then select “Send Envelope”. ***Please use the most current BO-7721 form. You can find it through Jagnet Portal. “Department” on the form must match in accordance to what reflects in TCP, should it be a sub-department you may type in the initial Department followed by a hyphen then sub-department EX: Business Office- Payroll.***

Note: The form will need to be filled out before proceeding to upload.

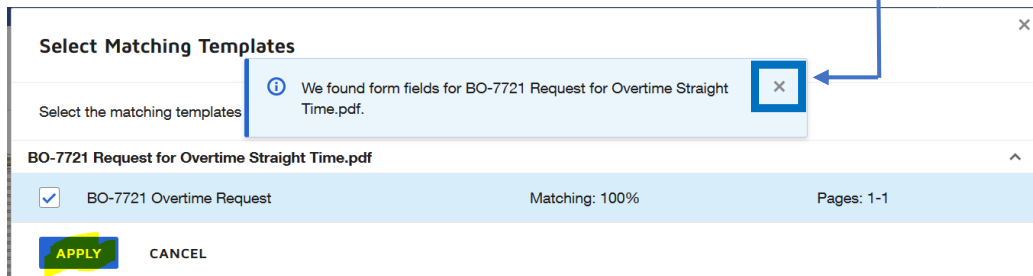


DocuSign Sender

4. Once you have your form filled out you will click on “Upload” and select your file then press “Open”.



5. The System will recognize the form and ask if you would like to apply the template. Click on “Apply”. Exit out of the pop-up message by clicking the “X”.

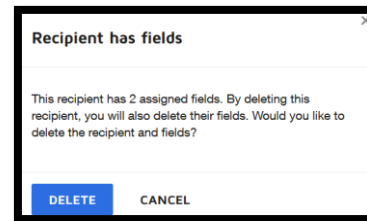


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SEND NOW NEXT

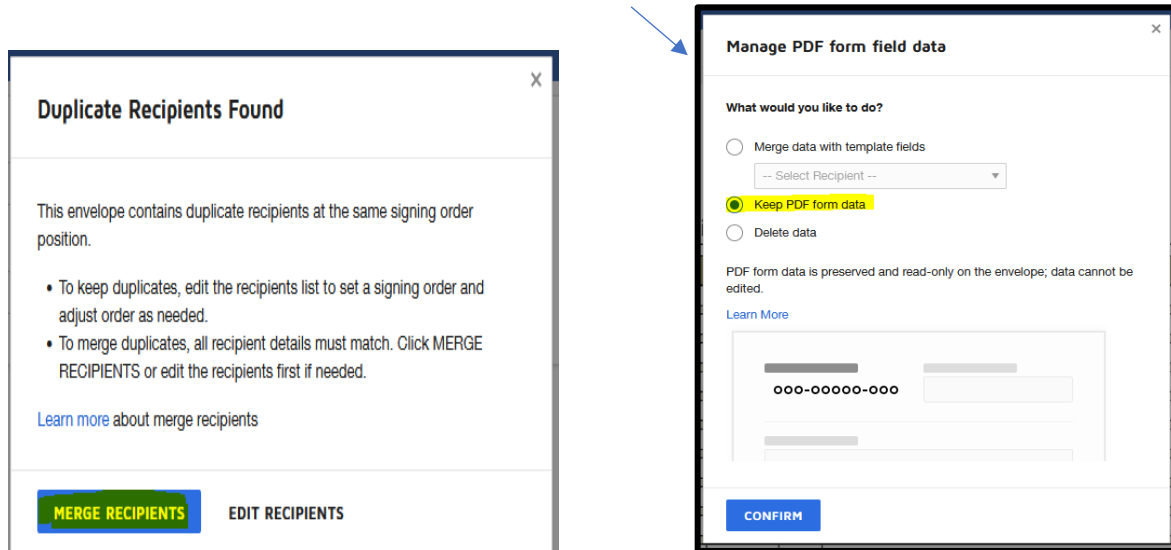
6. After you have uploaded the BO-7721 scroll down, you will fill out each field required and Click on Next.

- a. Initiator (Yourself)
 - i. Name and E-mail
- b. Supervisor
 - i. Name and E-mail
- c. Financial Manager
 - i. Name and E-mail
- d. Dean or Director (If Applicable) **should not require this field you may delete by clicking on the trash bin then click delete again on the popup.**
 - i. Name and E-mail
- e. Vice President
 - i. Name and E-mail

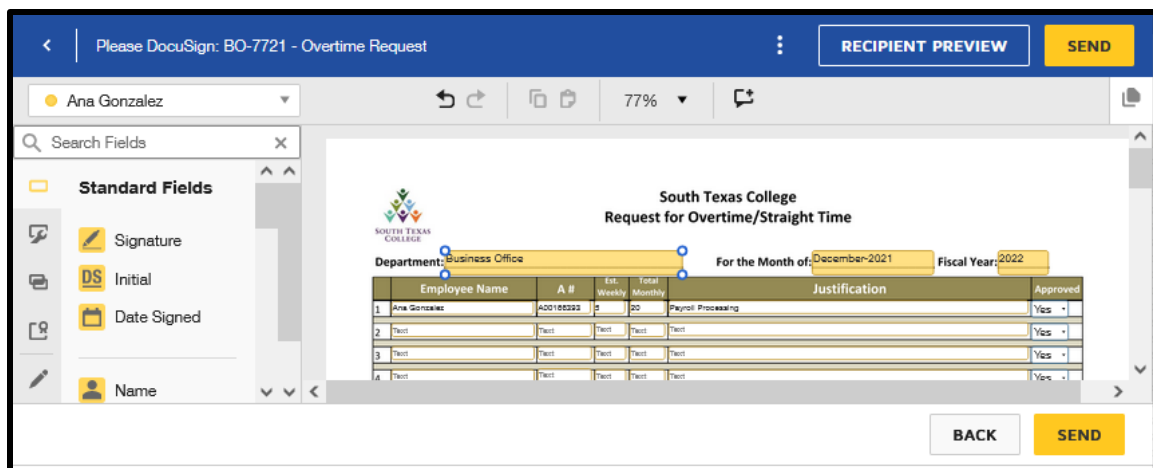


DocuSign Sender

7. Note if you are uploading multiple documents you will get the “Duplicate Recipients Found” pop up, click on “Merge Recipients”. Then you get the following pop-up. Select the 2nd option “Keep PDF From Data” and then on the dropdown Choose the supervisor then click “Confirm” (pop-up applies to either sending 1 or multiple documents)



- a. Review your document, then press “Send” at the top or the bottom.

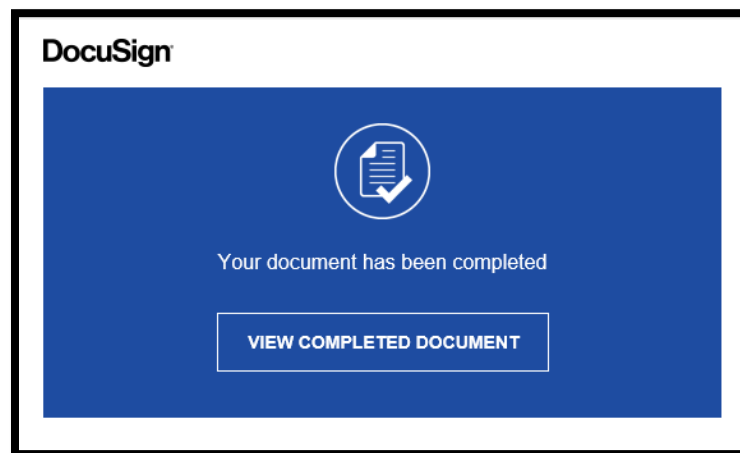


- b. An E-mail will be sent to individuals to whom it corresponds to in sequential order after reviewing and approving.

DocuSign Sender

Note: E-mail reminders will be sent via DocuSign every three days until signature is completed. Documents have a 31-day expiration date and will be voided if not completed by all signers within the time frame.

8. Once the Documents has been reviewed and approved by all then an e-mail notification will be sent when complete along with the attachment.
 - a. Please note that you will not have to do anything further at this point. The completed attachment will also be sent to the payroll office.



9. Should the BO-7721 Overtime Request Form be declined you will be notified via e-mail with a brief description or changes needed. This document will be voided and a new envelope will have to be created should revisions need to be done.

