



UTEP

DocuSign®

Introduction to DocuSign

Agenda

- DocuSign Overview
- Form & Email Samples
- Features
- Questions
- Live Demo

What is DocuSign?

- DocuSign (DS) is a software that features **electronic forms** that collect information and **route for approval**.
- Documents sent are known as **envelopes**. Envelopes act as packages for documents, each with an individual status. Regardless of how many documents are in an envelope, it only counts as one charge.

DocuSign Cost

- Initial 3 months in Production will be cost-free
- Cost per envelope - \$2.37
- Billing is based on monthly usage
- Grant funding cannot be used to cover DocuSign costs

Why Use DocuSign?

Benefits of using DocuSign:

- Electronically route documents for approval
- Legally binding
- Gather signatures within campus or outside of campus
- Automatic reminders for approval
- Check status of routing
- Ability to re-route
- Diminish the use of paper documents

Types of Forms

Templates:

Prebuilt envelopes that are initiated by departments based on need

Pros: Control over who uses the form

Cons: Initial email comes from person who initiated the form vs departmental account

PowerForms:

Templates that are accessed through a web link and can be initiated by the user

Pros: Form can be placed on a website and available for anyone to initiate

Cons: Risk of users submitting the same form multiple times resulting in high volume of incomplete forms

Ad hoc:

One-time use envelopes

Pros: Typical use would be one-time contract requiring signatures from parties outside UTEP

Cons: Department is responsible for the setting up the forms

Form Sample

- In DocuSign, you can designate separate fields based on the recipient.
- Examples:

Area 1 is for the initiator to enter

Area 2 is for the recipient to enter

SECTION I - EMPLOYER

Either the employee or the employer may complete Section I. While use of this form is optional, this form asks the health care provider for the information necessary for a complete and sufficient medical certification, which is set out at 29 C.F.R. § 825.306. **You may not ask the employee to provide more information than allowed under the FMLA regulations, 29 C.F.R. §§ 825.306-825.308.** Additionally, you **may not** request a certification for FMLA leave to bond with a healthy newborn child or a child placed for adoption or foster care.

Employers must generally maintain records and documents relating to medical information, medical certifications, recertifications, or medical histories of employees or employees' family members created for FMLA purposes as confidential medical records in separate files/records from the usual personnel files and in accordance with 29 C.F.R. § 1630.14(c)(1), if the Americans with Disabilities Act applies, and in accordance with 29 C.F.R. § 1635.9, if the Genetic Information Nondiscrimination Act applies.

(1) Employee name:
First Middle Last

(2) Employer name: Date: (mm/dd/yyyy) (mm/dd/yyyy)
(List date certification requested)

(3) The medical certification must be returned by (mm/dd/yyyy) (mm/dd/yyyy)
(Must allow at least 15 calendar days from the date requested, unless it is not feasible despite the employee's diligent, good faith efforts.)

SECTION II - EMPLOYEE

Please complete and sign Section II before providing this form to your family member or your family member's health care provider. The FMLA allows an employer to require that you submit a timely, complete, and sufficient medical certification to support a request for FMLA leave due to the serious health condition of your family member. If requested by your employer, your response is required to obtain or retain the benefit of the FMLA protections. 29 U.S.C. §§ 2613, 2614(c)(3). **You are responsible for making sure the medical certification is provided to your employer within the time frame requested, which must be at least 15 calendar days.** 29 C.F.R. §§ 825.305-825.306. Failure to provide a complete and sufficient medical certification may result in a denial of your FMLA leave request. 29 C.F.R. § 825.313.

(1) Name of the family member for whom you will provide care:

(2) Select the relationship of the family member to you. The family member is your:

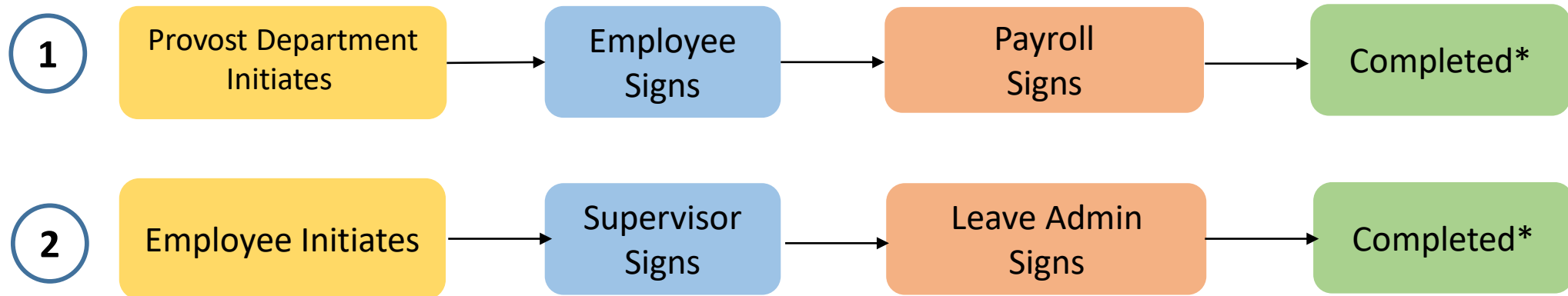
☐ Spouse ☐ Parent ☒ Child, under age 18
☐ Child, age 18 or older and incapable of self-care because of a mental or physical disability

Spouse means a husband or wife as defined or recognized in the state where the individual was married, including in a common law marriage or same-sex marriage. The terms "child" and "parent" include *in loco parentis* relationships in which a person assumes the obligations of a parent to a child. An employee may take FMLA leave to care for an individual who assumed the obligations of a parent to the employee when the employee was a child. An employee may also take FMLA leave to care for a child for whom the employee has assumed the obligations of a parent. No legal or biological relationship is necessary.

This is the form page of a Template in DocuSign. Orange boxes denote different fields required to be entered based on the recipient.

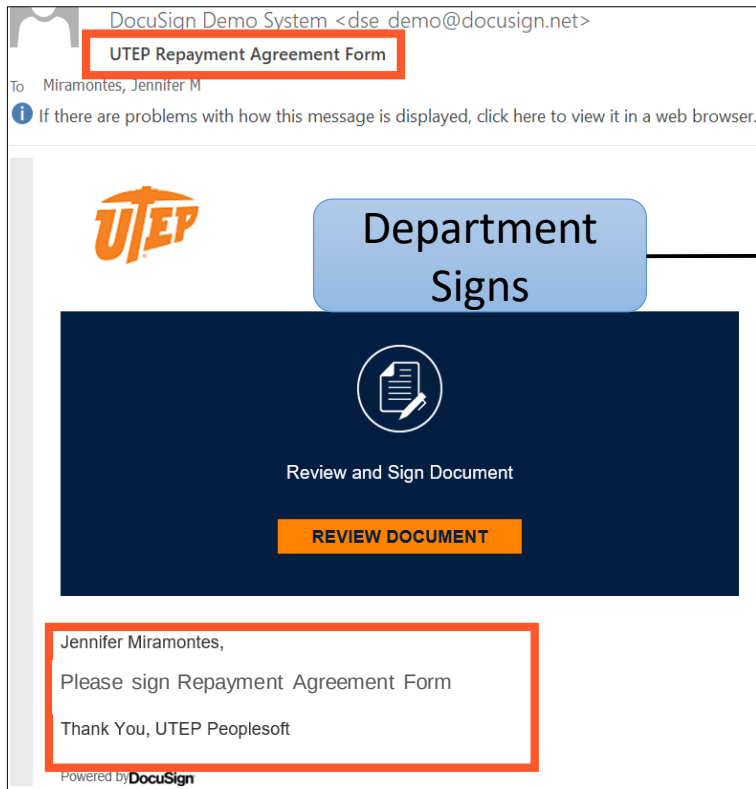
Workflow Sample

- Envelopes follow a predetermined workflow and route to the designated recipients.
- Workflow Samples:

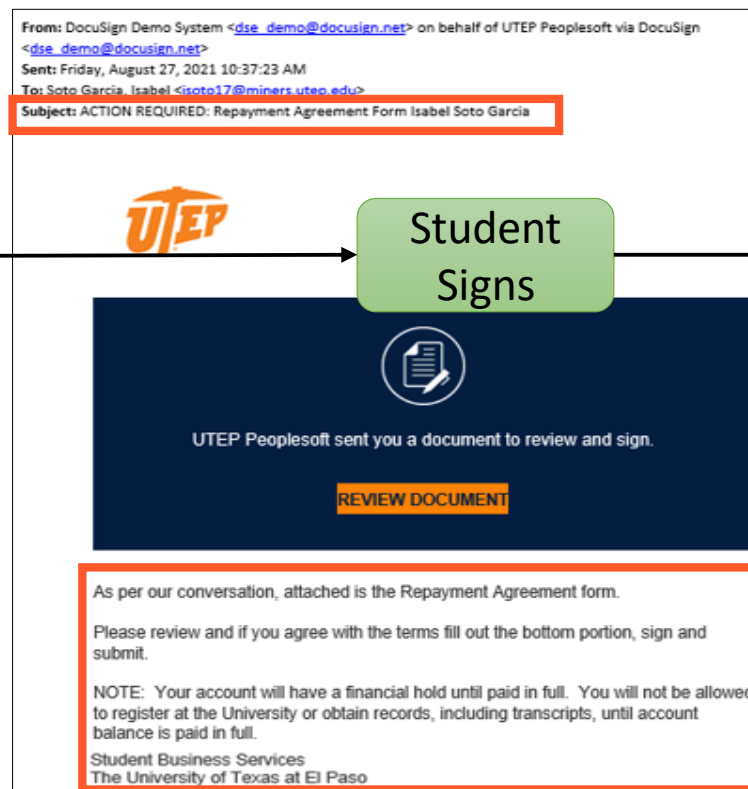


*All parties receive a copy of the completed form.

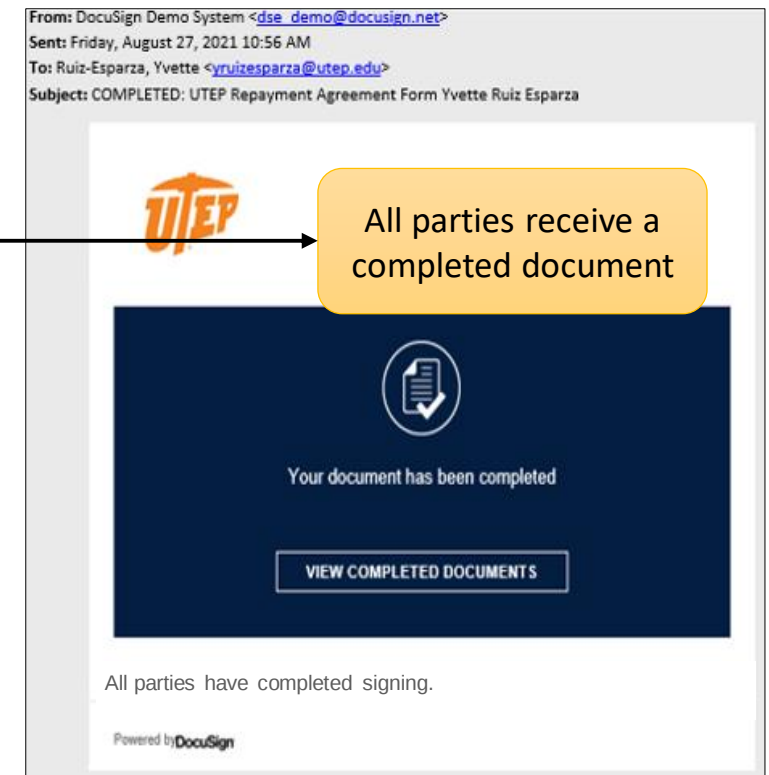
Email Samples



This is the email the initiator will receive for this SBS form.



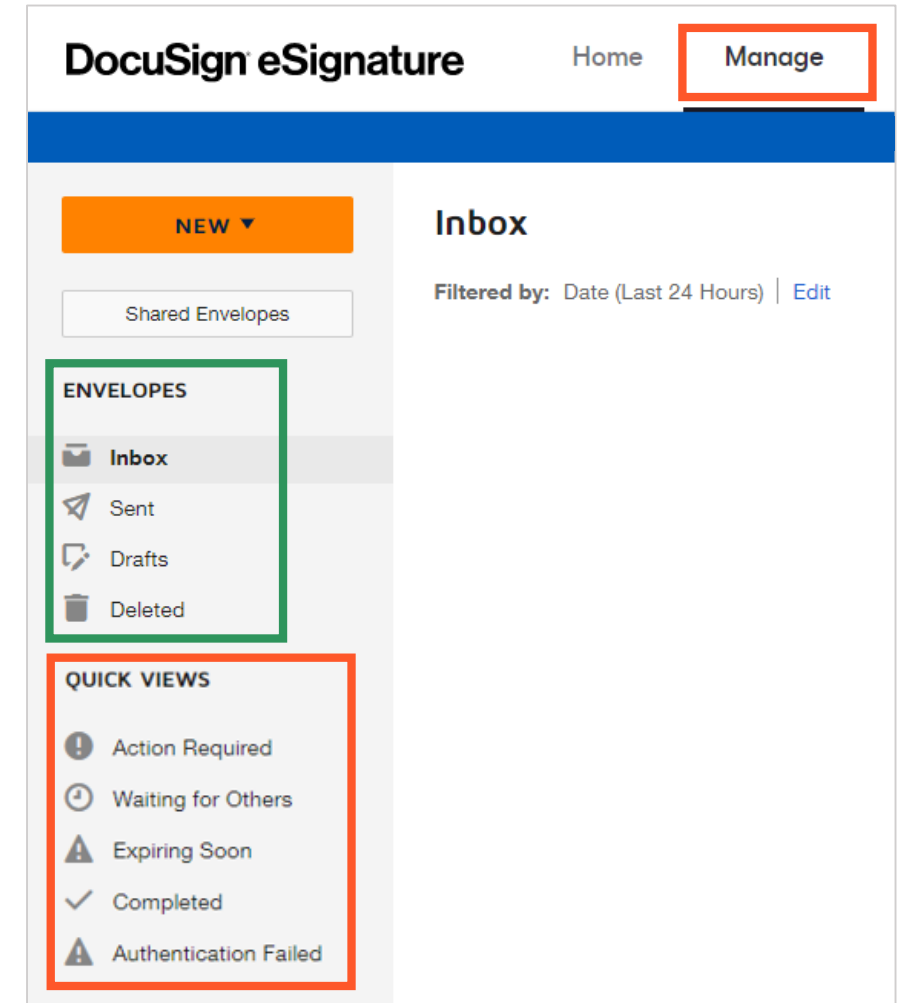
This is the email the student recipient will receive for this SBS form.



This is the email all parties in the workflow will receive after the document has been completed.

How To Manage Envelopes

- Under the Manage page, users can track and view the status of envelopes.
 - **Envelopes** section gives users the ability to track envelopes they've sent or received, view envelope drafts, and view deleted envelopes.
 - **Quick Views** allows users to review envelopes pending their approval, view documents waiting for others to approve or access those that have been completed.



How To Review Reports

- DocuSign provides users the option to run pre-built reports that can deliver insight into their account.
- Report categories available:

Envelope

Usage

DocuSign eSignature Home Manage **Reports**

Search

Overview

TYPE	
All	15
Envelope	7
Recipient	2
Usage	5
Custom	1

Downloads

No recent report downloads.

Report Examples:

- Envelope volume report
- Usage activity report

Downloads

Signing Insights

DEMO

Thank You!