

Create an Envelope with DocuSign Job Aid

DocuSign Adding an Envelope

Click on new – a drop down of two options will appear. Select send an envelope.

DocuSign eSignature	Home	Manage	Reports	5	
Sign or	Get Si	ignature	5	NEW	
			s	end an Envelope	
			s	ign a Document	

This will bring you to 'Add Documents to Envelope' Page.

Click on upload – This will bring you to the drive that your document is stored. Select the document needed for signature. Once you select your document, you'll then notice the document will appear to the left of the 'upload' box

Add Documents to the Envelope Add Documents to the Envelope

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	DocuSign DEMO_ePAF.pdf	

To send a document for signature – you'll need to add receipts to the envelope. Enter their name and email address. If you need to add another recipient, just click the 'add recipient' button and continue to add who needs to sign this document.

Add Recipients to the Envelope

As the sender, you automatically receive a copy of the completed envelope.

Set signing order	
Name *	🖋 NEEDS TO SIGN 🔻 MORE 🔻
Kimberly Carville	
Email *	
kim.carville@umassmed.edu	

ADD RECIPIENT

ADD CONDITIONAL RECIPIENT

You have the option to enter your own subject line and enter a message.

Message to All Recipients
Custom email and language for each recipient
Email Subject*
Please DocuSign: DocuSign DEMO_ePAF.pdf
Characters remaining: 61
Email Message
Enter Message
Characters remaining: 10000

Click the yellow **next** button at the bottom right of the screen.

You'll see a menu bar to the left and the document you uploaded.

From the menu bar on the left, select signature and drop the 'sign' flag to a spot on the document you would like the individual to sign.





DocuSign DEMO – ePAF for funding changes

ePAF Job Change View Form

Once you've set the 'sign' flag in its spot, click the yellow **send** button at the bottom right of the screen.