DocuSign

PROCESS FOR DFA KSAMS REQUEST FORMS

STEPS TO FOLLOW

1. Include a routing slip with all requests.

2. Upload routing slip and filled out KSAMS Request Form for signature in DocuSign as an "Envelope".

   - When prompted, select "Keep Form Data"

3. Add required recipients in DocuSign (including reviewers and those who need to be copied) and set up the correct signing order.

   1) from supervisor
   2) to Department Head
   3) to McKenna Reeves (mlreeves@uci.edu)
   4) to Grace Crvarich (grace.crvarich@uci.edu)

4. Select appropriate role type for each recipient

   - "**Needs to Sign**" for signers and reviewers

   - "**Receives Copy**" for those wanting to receive the final approved document

5. Customize the subject line of the DocuSign email as follows:

   - "**DFA DocuSign: On behalf of Name of DFA Department Head – KSAMS Request Subject**"

   - Example:
     "**DFA DocuSign: On behalf of Katherine Gallardo – New Employee Access Requests**"

6. (If applicable) If a UCPath role notes "**Requires Training**," please submit the UCPath Powerform for campus. Below is a link to the UCPath roles with a description and required training. https://wiki.oit.uci.edu/display/PPSHRISPUB/Roles The UCPath Powerform is a supplemental form in addition to the KSAMS Request Form. Once the powerform is complete, we can resubmit the UC PATH roles.

TIPS & BEST PRACTICES

1. Complete the in-person or online training "Introduction to DocuSign." Register at www.uclc.uci.edu.

2. Set up DocuSign templates for recurring internal approval processes.

   - Examples include: Capital Planning Funding Requests, Campus Project Approvals, UCIMC Project Approvals, Certification Checklist for Delegation Authority, etc.

   - Complete online training on templates via DocuSign:
     - Using Templates
     - Getting Started with Templates
     - Sending an Envelope with a Template
     - Managing Templates

     Or via the UCI DocuSign Video Library

3. Set up a Group Account for business continuity purposes and sharing envelopes and templates with members of your team or department. Email docusign@uci.edu to request a Group Account.

4. Encourage recipients to use "**Comments**" in DocuSign for questions, instead of "**Declining to Sign**." All recipients should be subscribed to receive DocuSign notification emails, or regularly check account.

5. If appropriate, add administrative assistant of respective Associate VCs and Assistant VCs as cc recipients if they did not originate the DocuSign envelope. This ensures they receive a copy of the final signed document.

6. Email notification is sent to initiator after all recipients have signed the document. Documents over 5 MB, will not be attached to the email notification and is accessible from your DocuSign account.

Additional Resources: www.docusign.uci.edu or www.suppport.docusign.com
Technical Assistance: Jen Swann, jenifer.swann@uci.edu, 949-824-6956 | **Training Assistance:** Abbey Dimitrova, adimi@uci.edu, 949-824-0576