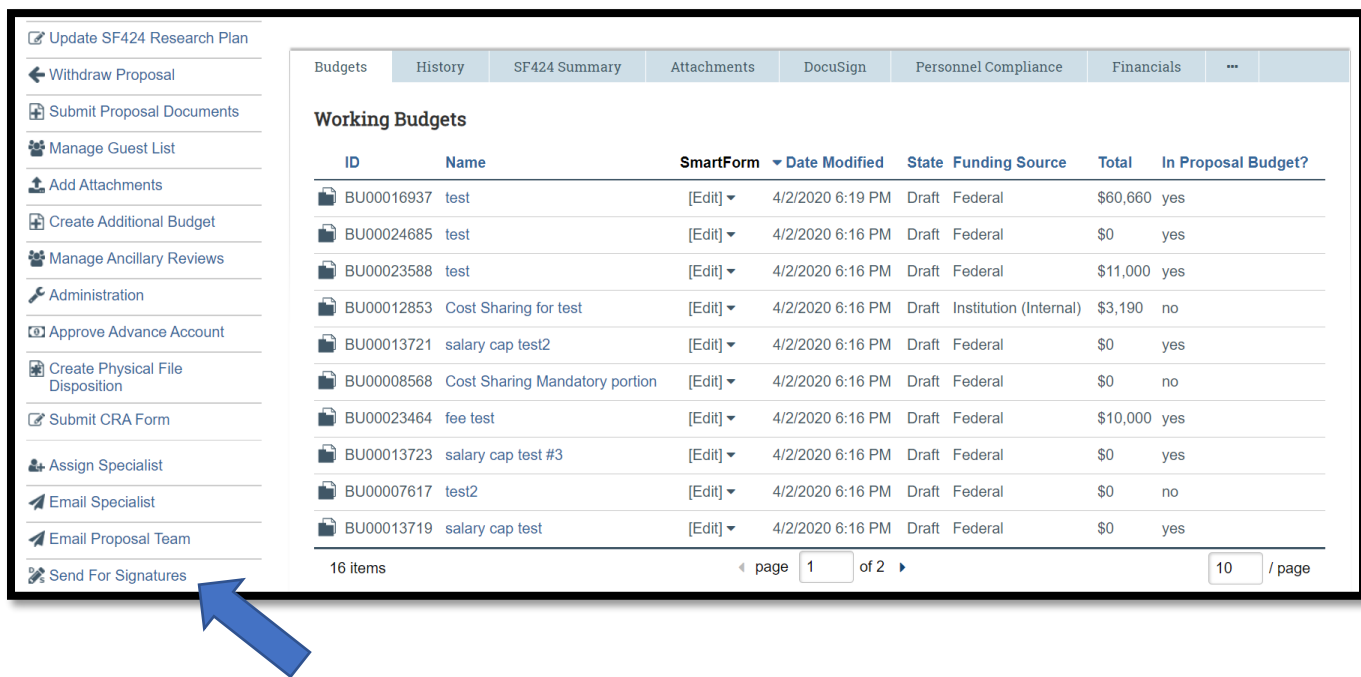**Overview:** How to send a document for signature in MyFunding with DocuSign.

Examples:

1. A Statement of Intent to establish a Consortium Agreement requires a signature.

2. A grant modification requires a signature.

Where to Start

1. In the proposal or award workspace, click on 'Send For Signatures':

2. The 'Send For Signatures' pop-up window will appear:

a. Click 'Upload' to add a PDF or Word document:

b. The 'Submit a Document' pop-up window will appear. Enter the Title and click 'Choose File' to upload the document. Click 'OK':

Submit a Document   ❓ Help

Title: ➡ [_____] If not provided, the name of the file will be used

* File: [_____] Choose File View

* Required   ➡ OK Cancel

c. Add Internal and/or External Recipients:

Send For Signatures

* Draft Document
[None] ⬆ Upload

Assigned Account Signing Groups:
[_____] ...

ID
There are no items to display

Internal Recipients (select from people who have contacts within MyFunding):
✛ Add ➡

Recipient	Email Address	Type
There are no items to display		

External Recipients (enter information for people who are not entered within MyFunding):
✛ Add ➡

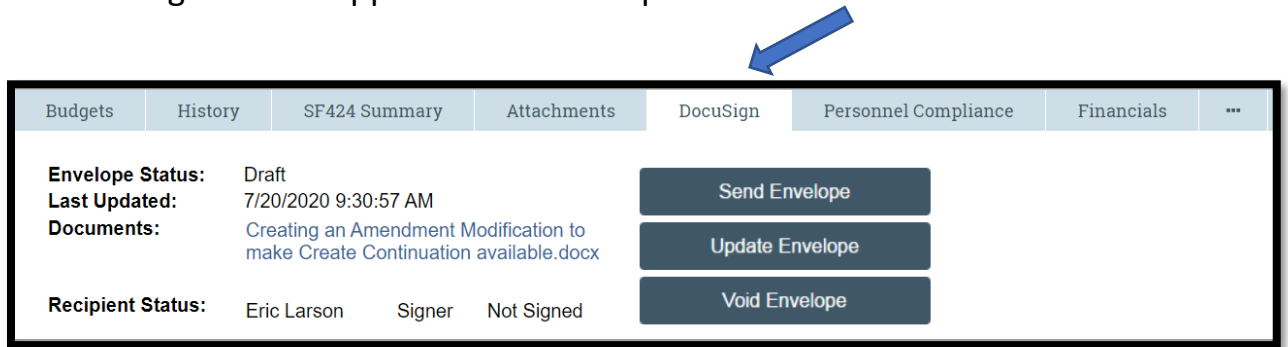| Name	Email Address	Type
There are no items to display		

d. The pop-up below will open for internal recipients. Click the ellipses to select a Recipient. Click 'OK'. Select a Type. Select 'OK and Add Another' for additional recipients. Click 'OK' when complete:

e. The pop-up window below will open for external recipients. Enter the Name and Email Address of the recipient. Select Type. Click 'OK and Add Another' for additional recipients. Click 'OK' when complete:

3. The DocuSign tab will appear in the Workspace:

| Budgets | History | SF424 Summary | Attachments | DocuSign | Personnel Compliance | Financials | ... |

Envelope Status: Draft
Last Updated: 7/20/2020 9:30:57 AM
Documents: Creating an Amendment Modification to make Create Continuation available.docx

Recipient Status: Eric Larson   Signer   Not Signed

Send Envelope
Update Envelope
Void Envelope

4. Click 'Send Envelope' to route the document for signatures:

| Budgets | History | SF424 Summary | Attachments | DocuSign | Personnel Comp |

Envelope Status: Draft
Last Updated: 7/20/2020 9:30:57 AM
Documents: Creating an Amendment Modification to make Create Continuation available.docx

Recipient Status: Eric Larson   Signer   Not Signed

Send Envelope
Update Envelope
Void Envelope

5. 'Send Envelope' will open the DocuSign web interface. Use DocuSign to add standard fields (i.e., signature, date signed, determine signing order) and send the document. Once the signing process is complete, the signed document will be in *both* the DocuSign and the Attachments tabs:

| Budgets | History | SF424 Summary | Attachments | DocuSign | Personnel C |

Envelope Status: Completed
Date Sent: 7/23/2020 10:03:50 AM
Date Completed: 7/23/2020 10:04:29 AM
Last Updated: 7/23/2020 10:05:20 AM
Documents: Creating an Amendment Modification to make Create Continuation available.docx

Recipient Status: Eric Larson   Signer   7/23/2020 10:04:29 AM

DocuSign Tips

1. The envelope status is automatically refreshed every 15 minutes. The envelope status, date sent, date completed, last updated, and recipient status will be updated accordingly. 'Update Envelope' can be used to force a status update on the DocuSign tab in MyFunding rather than waiting for the automatic update every 15 minutes.

2. The 'Send For Signatures' activity is available in all states for award records. The 'Send For Signatures' activity is available on funding proposals when the PI Certification is complete and in Specialist Review, Specialist Review: Pending PI Changes, Final OSP Review, Pending Sponsor Review, Pending Department Submission, Corrections Required, Pending Sponsor Review Award Anticipated, Award Notification Received, Awarded, JIT Response Required, OSP Status Confirmation, Completed, Terminated, and Withdrawn from Sponsor states.

3. Multiple envelopes can be sent on a record. However, each envelope can contain only one document for signatures.