

University of California San Diego

An Authorized
OSHA Training Institute
Education Center®

UC SAN DIEGO OTIEC OUTREACH DEPARTMENT

INSTRUCTIONAL GUIDE TO DOCUSIGN

How to send and manage documents online

What is DocuSign?

DocuSign is a way to manage electronic agreements and with the eSignature feature, gives the ability for forms to be signed electronically on different devices.

When teaching Virtual Instructor Led Training (VILT) courses, OSHA requires trainers to have a Daily Sign-In Sheet where the students have to sign each day of the class. One way to electronically cover this requirement, is to set up a document on DocuSign that the students will receive and be able to give an electronic signature.

FEATURES OF DOCUSIGN

SIGN FROM ANYWHERE

Create a document or electronically sign one using a computer, tablet, or phone.

INSTANT STATUS VISIBILITY

Ability to track where your document is in the signing process.

COLLECT NEEDED DETAILS

Add fields of the information you need to gather such as signature, email, etc.

HIGHLY SECURE

Uses strong data encryption technologies and follows strict US security standards.

DocuSign Pricing

For more information on pricing, visit
<https://www.docusign.com/products-and-pricing>

PERSONAL: \$10

- Single user only
- Send 5 documents for eSignatures a month
- Basic fields

STANDARD: \$25

- For up to 5 users online (\$25 per user)
- Send unlimited documents a month
- Basic Fields
- Reminders and notifications
- Personalized branding

BUSINESS: \$40

- For up to 5 users online (\$40 per user)
- Send unlimited documents a month
- Basic Fields
- Reminders and notifications
- Personalized branding
- Signer attachments
- Bulk Send

How to Send a Document Using DocuSign

For the purposes of this demo, I will be using the Daily Sign-In Sheet template provided by the Outreach Department.

To view the template, go to:

<https://extension.ucsd.edu/osh/outrach-training/outrach-training-course-materials>

Note: Feel free to use your own Daily Sign-In Sheet template if you already have one. Just make sure it includes all the required information.



3 Main Steps - Overview

1) UPLOAD YOUR DOCUMENT

Upload a Microsoft Word or PDF document from your computer or any popular file-sharing sites like Box, Dropbox, Google Drive, or OneDrive.

2) INDICATE WHO NEEDS TO SIGN

Add names and email addresses of the signers. DocuSign emails a link to the recipients which they use to access the document to electronically sign.

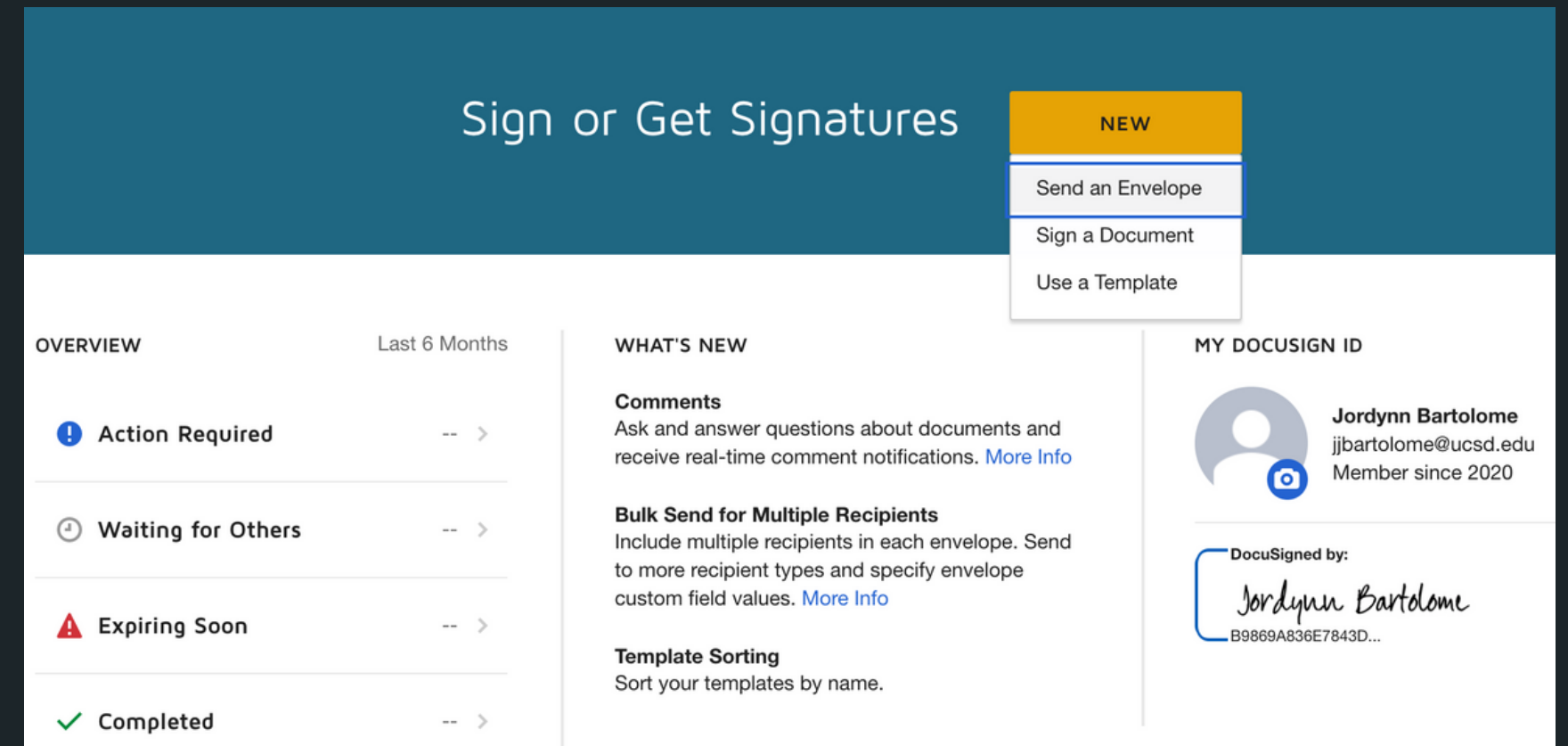
3) PLACE FIELDS AND SEND

Drag and drop DocuSign fields to indicate where you need a signature, address, phone number, etc. Then click Send.

Step 1: Upload Your Document

Log into your DocuSign account.

Click the button **NEW** and then click **Send an Envelope**.



Step 1: Upload Your Document

Click **UPLOAD** to upload a document from your computer, or click **GET FROM CLOUD** to upload a document from an online location.

Locate the document you want to upload and click **Open**.

Add Documents to the Envelope



UPLOAD

USE A TEMPLATE

GET FROM CLOUD ▼

Step 2: Indicate Who Needs to Sign

In the RECIPIENTS field, enter all the students' names and email addresses.

Note: If you have an excel or CSV file, there is an **Import Bulk List** option instead of manually typing in all the information.

Add Recipients to the Envelope

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

[Import a bulk list.](#) Send copies of this envelope to many people at once. ⓘ

Set signing order

Name * ✍️ NEEDS TO SIGN ▼ CUSTOMIZE ▼

Connie Roloff

⋮

Email *

croloff@ucsd.edu

Name * ✍️ NEEDS TO SIGN ▼ CUSTOMIZE ▼

Kaila Seppala

⋮

Email *

kseppala@ucsd.edu

Step 2: Indicate Who Needs to Sign

DocuSign automatically adds an email subject when you upload a document.

You can edit this subject and add a message to the recipient by filling in the MESSAGE fields.

Click **NEXT** when you are done.

Message to All Recipients

Custom email and language for each recipient

Email Subject*

10HR Construction Daily Sign In Sheet 10/5

Characters remaining: 58

Email Message

Please fill in all required fields (mailing address, phone number, and email) with your information and give an electronic signature.

Characters remaining: 9867

Step 3: Place Fields and Send

The Fields Palette and your document will appear on the screen.

This is where you will drag and drop the corresponding fields to the document and assign a specific person to each field.

The screenshot shows a digital form creation tool. On the left is a 'Standard Fields' palette with options: Signature, Initial, Date Signed, Name, Email, Company, Title, Text, Checkbox, and Dropdown. The main workspace displays a form titled 'UCSD OTIEC OUTREACH STUDENT DAILY SIGN - IN SHEET (ALL FIELDS REQUIRED)'. The form includes a header with 'STUDENT MINIMUM: 3' and 'STUDENT MAXIMUM: 40'. Below the header is a table with fields for Course Name, Course Date, Instructor Name, Course Start/End Time, and Course Location. At the bottom of the form is a table for student entries with columns for Student Name, Student Signature, Mailing Address & Phone, and E-Mail. The interface also shows a user profile 'Kaila Seppala', a search bar, and a 'Documents' sidebar on the right. At the bottom right, there are 'BACK' and 'SEND' buttons.

| UCSD OTIEC OUTREACH STUDENT DAILY SIGN - IN SHEET (ALL FIELDS REQUIRED) | | | |
|---|-----------------------|---------------------------------------|---------------------------|
| STUDENT MINIMUM: 3 | | STUDENT MAXIMUM: 40 | |
| Course Name (Ex: Const. 10): | 10 Hour Construction | Course Date: | 10/05/2020 |
| Instructor Name (Print): | Stephanie MacGillfrey | Course Start / End Time: | 8:00am - 4:00pm |
| Instructor Signature: | | Course Location (Name, City & State): | UCSD OTIEC La Jolla, CA |
| STUDENT NAME (PRINT OR TYPE) | STUDENT SIGNATURE | MAILING ADDRESS & PHONE | E-MAIL |
| | | | |
| | | | |
| | | | |
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| | | | |
| | | | |
| | | | |

The student names you entered in Step 2 will be shown in the Recipient List located in the top left corner of the workspace. Each name is color coded to help you know which field box is assigned to which student. To select a different student, click anywhere on the Recipient List box and a dropdown will appear with all the other student names for you to choose from.

The screenshot shows the UCSD OTIEC Outreach Student form interface. On the left, there is a 'Search Fields' panel with a search bar and a list of fields: Signature, Initial, Date Signed, Name, Email, Company, Title, and Text. The main form area contains the following information:

UCSD OTIEC OUTREACH STUDENT
STUDENT MINIMUM: 3

| | |
|------------------------------|----------------------|
| Course Name (Ex: Const. 10): | 10 Hour Construction |
| Instructor Name (Print) | Stephanie MacGilfrey |
| Instructor Signature: | |

| STUDENT NAME (PRINT OR TYPE) | STUDENT S |
|------------------------------|-----------|
| | |
| | |
| | |
| | |
| | |

At the top left, a dropdown menu is open, showing a list of student names with color-coded circles next to them:

- Kaila Seppala (purple circle)
- Connie Roloff (yellow circle)
- Jordynn Bartolome (light blue circle)
- Kaila Seppala (purple circle, checked)
- Stephanie Macgilfrey (teal circle)

Below the list is an 'Edit Recipients' button. A yellow arrow points from the 'Kaila Seppala' dropdown in the top left to the dropdown menu.

To assign a signature or other field for the recipient, click and drag a field from the Standard Fields Palette and place it on the document.

Fields such as Name or Email will be automatically filled in by DocuSign since that information is already stored in the system.

Notice how the different fields are color coded depending on what person it is assigned to.

Connie Roloff

98%

Search Fields

Standard Fields

- Signature
- Initial
- Date Signed
- Name
- Email
- Company
- Title
- Text
- Checkbox
- Dropdown

UCSD OTIEC OUTREACH STUDENT DAILY SIGN - IN SHEET (ALL FIELDS REQUIRED)
STUDENT MINIMUM: 3 STUDENT MAXIMUM: 40

| | | | |
|------------------------------|----------------------|---------------------------------------|---------------------------|
| Course Name (Ex: Const. 10): | 10 Hour Construction | Course Date: | 10/05/2020 |
| Instructor Name (Print): | Stephanie MacGilfrey | Course Start / End Time: | 8:00am – 4:00pm |
| Instructor Signature: | | Course Location (Name, City & State): | UCSD OTIEC La Jolla, CA |

| STUDENT NAME (PRINT OR TYPE) | STUDENT SIGNATURE | MAILING ADDRESS & PHONE | E-MAIL |
|------------------------------|-------------------|-------------------------|--------|
| Full Name | Sign | | Email |
| Full Name | Sign | | Email |
| Full Name | Sign | | Email |
| | | | |
| | | | |
| | | | |

If you need a response field that is not listed, click and drag a Text field to the document.

You can resize how big you want the field box by clicking and dragging on one of the corners to the desired size.

To relabel the field box (to describe what information the student should input), look towards the right of the screen to the Add Text box and type it in.

Connie Roloff

98%

Search Fields

Standard Fields

- Signature
- Initial
- Date Signed
- Name
- Email
- Company
- Title
- Text
- Checkbox
- Dropdown

UCSD OTIEC OUTREACH STUDENT DAILY SIGN - IN SHEET (ALL FIELDS REQUIRED)
STUDENT MINIMUM: 3 STUDENT MAXIMUM: 40

| | | | |
|------------------------------|----------------------|---------------------------------------|---------------------------|
| Course Name (Ex: Const. 10): | 10 Hour Construction | Course Date: | 10/05/2020 |
| Instructor Name (Print): | Stephanie MacGilfrey | Course Start / End Time: | 8:00am - 4:00pm |
| Instructor Signature: | | Course Location (Name, City & State): | UCSD OTIEC La Jolla, CA |

| STUDENT NAME (PRINT OR TYPE) | STUDENT SIGNATURE | MAILING ADDRESS & PHONE | E-MAIL |
|------------------------------|-------------------|---------------------------------|--------|
| Full Name | Sign | Mailing Address Phone Number | Email |
| Full Name | Sign | Mailing Address Phone Number | Email |
| Full Name | Sign | | Email |

Add Text

Mailing Address

Save As Custom Field

Delete

When you are finished with your document, review it over once more to make sure all the necessary field boxes have been placed and are assigned to the correct person.

To send your document, click on the SEND button located on the bottom right corner of the page. DocuSign will then send out an email to all the recipients with a link to the document for them to fill out their assigned field boxes.

Connie Roloff

98%

Search Fields

Standard Fields

- Signature
- Initial
- Date Signed
- Name
- Email
- Company
- Title
- Text
- Checkbox
- Dropdown

UCSD OTIEC OUTREACH STUDENT DAILY SIGN - IN SHEET (ALL FIELDS REQUIRED)
STUDENT MINIMUM: 3 STUDENT MAXIMUM: 40

| | | | |
|------------------------------|-------------------------------------|---------------------------------------|---------------------------|
| Course Name (Ex: Const. 10): | 10 Hour Construction | Course Date: | 10/05/2020 |
| Instructor Name (Print): | Stephanie MacGilfrey | Course Start / End Time: | 8:00am – 4:00pm |
| Instructor Signature: | <input type="button" value="Sign"/> | Course Location (Name, City & State): | UCSD OTIEC La Jolla, CA |

| STUDENT NAME (PRINT OR TYPE) | STUDENT SIGNATURE | MAILING ADDRESS & PHONE | E-MAIL |
|--|-------------------------------------|---|------------------------------------|
| <input type="text" value="Full Name"/> | <input type="button" value="Sign"/> | <input type="text" value="Mailing Address"/> <input type="text" value="Phone Number"/> | <input type="text" value="Email"/> |
| <input type="text" value="Full Name"/> | <input type="button" value="Sign"/> | <input type="text" value="Mailing Address"/> <input type="text" value="Phone Number"/> | <input type="text" value="Email"/> |
| <input type="text" value="Full Name"/> | <input type="button" value="Sign"/> | <input type="text" value="Mailing Address"/> <input type="text" value="Phone Number"/> | <input type="text" value="Email"/> |
| | | | |
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| | | | |

Documents

UCSD-OTIEC-OUTRE...
Pages: 1

1

BACK

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If you have any questions, please email
oti-outreach@ucsd.edu