

Receiving a Document for Guided Signing

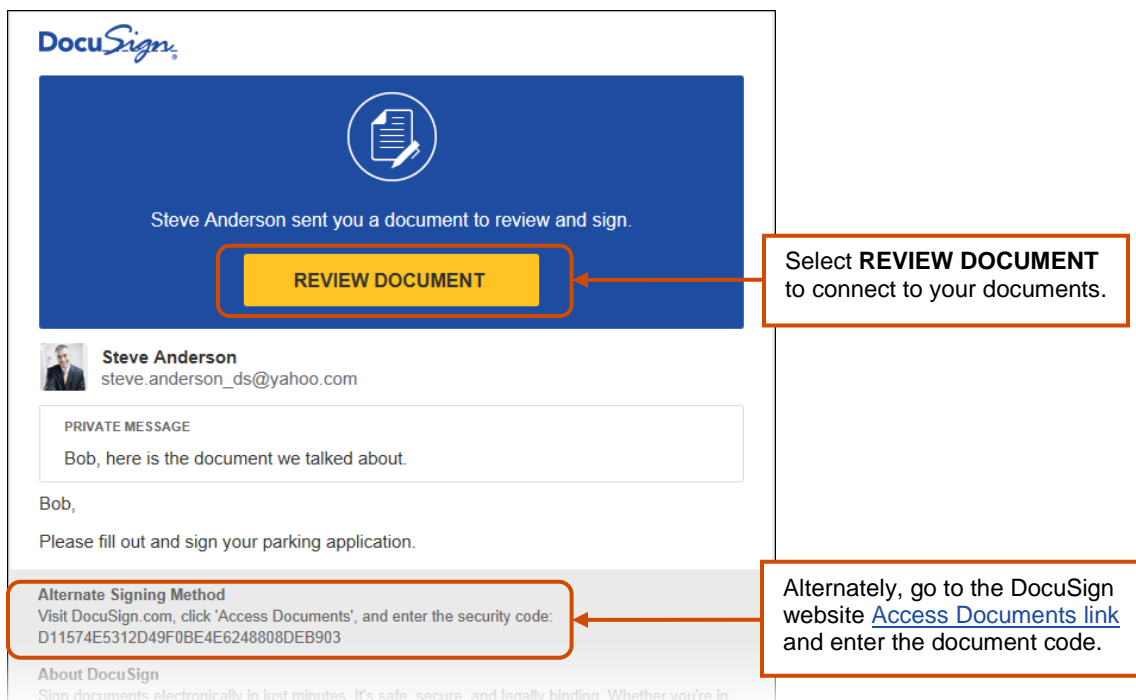
This guide provides information about how to electronically sign a document using DocuSign®. Electronic signing provides a quick, easy, and secure method for you to receive, sign, and return documents from a sender without the need for appearing in person or sending documents back and forth by fax or mail.

Note: There might be times when the sender requires an authentication check to ensure that the correct person is opening and signing a document. The actions you need to take to verify your identity are explained in [Step 2](#) of the guide.

1. Receiving an Email Notification

The signing process begins when you receive an email requesting that you electronically sign a document. The email is sent by DocuSign on behalf of the sender and has a message from the sender and a link to open the document.

Note: There might be some differences between the color and text of the images shown in this guide and what you see during signing.



The screenshot shows an email from DocuSign. At the top, it says "Steve Anderson sent you a document to review and sign." Below this is a prominent yellow button labeled "REVIEW DOCUMENT". A callout box points to this button with the text: "Select **REVIEW DOCUMENT** to connect to your documents." Below the button is a private message from Steve Anderson (steve.anderson_ds@yahoo.com) that says "Bob, here is the document we talked about." and "Please fill out and sign your parking application." At the bottom of the email, there is an "Alternate Signing Method" section with the text: "Visit DocuSign.com, click 'Access Documents', and enter the security code: D11574E5312D49F0BE4E6248808DEB903". A second callout box points to this section with the text: "Alternately, go to the DocuSign website [Access Documents link](#) and enter the document code."

After opening your email, select **REVIEW DOCUMENT** to access the documents. A new web browser window opens, connects to the secure DocuSign Online Signing Service website, and displays the signing welcome. Alternately, you can access the documents by going to the [DocuSign website](#), selecting the **Access Documents** link and then entering the document code from the email.

- Signer Authentication is a way for the sender to verify your identity before allowing you to access the documents. The different types of authentication are described in [Step 2](#).
- If the sender did not require additional authentication, you are taken to the signing welcome; skip to [Step 3](#).

2. Signer Authentication

There are several authentication options that can be used by the sender: an Access Code, SMS Authentication, Phone Authentication, ID Check, and Social ID login. Each of these options is explained below.

Access Code: With this option you are asked to enter an access code into a security request page to access the documents. The access code is provided to you by the person sending the document.

- If you do not know the access code, select **I NEVER RECEIVED AN ACCESS CODE** to send a message to the sender telling them that you do not have the access code.
- Enter the code and select **VALIDATE** to complete the security request. You have three attempts to enter the access code correctly. After the access code is has been correctly entered, you are taken through the normal signing process. Continue to [Step 3](#).

SMS Authentication: With this option you are presented with a security request page and must select a phone number for text authentication. Select **SEND SMS** to continue or select **CANCEL** to postpone the call and return later.

- After selecting **SEND SMS**, an SMS text message with a passcode is sent to the selected phone number.
- Enter the passcode and select **CONFIRM CODE** to complete the security request. After the passcode is checked, you are taken through the normal signing process. Continue to [Step 3](#).

Phone Authentication: With this option you are presented with a security request page and must select a phone number, or type a new number, to use for authentication. Select **CALL** to continue or select **CANCEL** to postpone the call and return later.

- After selecting **CALL**, an authentication code page appears and the system places a call to the selected (or entered) number.
- After answering the phone, you are prompted to use the phone keypad to enter the authentication code and then speak your name. After the authentication code is checked, you are taken through the normal signing process. Continue to [Step 3](#).

ID Check: With this option you are prompted to enter personal information and then you are presented with questions about yourself based on data available in public records.

- After entering the personal information, select **NEXT** to continue.
- You are presented with a set of questions based on publicly available information. Answer the questions to complete the ID check. After the ID check is successfully completed, you are taken through the normal signing process. Continue to [Step 3](#).

Social ID Check: With this option you are presented with a security request page explaining the security check.

- Select **CONTINUE**. You are then asked to enter your LiveID or other social ID information to access the documents for signing. After entering the information, you are taken through the normal signing process. Continue to [Step 3](#).

3. Signing Welcome

The welcome and instructions, along with any messages from the sender, is shown at the top of the browser.

The screenshot shows the 'Please Review & Act on These Documents' interface. At the top, it identifies the sender as Steve Anderson from GenWatt, Inc. Below this, there are two messages: a 'PRIVATE MESSAGE' and a general 'Message'. A blue bar contains a checked checkbox for 'I agree to use Electronic Records and Signatures' and a yellow 'CONTINUE' button. To the right is an 'OTHER ACTIONS' menu. The main content area displays the 'Parking Application' form with fields for Name (Bob Stack) and Address. A callout box points to the 'I agree' checkbox and the 'CONTINUE' button, stating: 'Select I agree and then select CONTINUE to review and sign the documents.'

Review the disclosure and select the check box for agreeing to use Electronic Records and Signatures, and then select **CONTINUE** to hide the welcome begin reviewing and signing the documents.

Important! You must agree to use electronic records and signatures in order to view and sign the documents.

Optionally, you can use the **OTHER ACTIONS** menu at the right of the browser to select a different option for the documents, such as finishing later or declining to sign. The available options depend on sender settings; see the [Other Actions section](#) for more information about these options.

4. Adding Information and Signing the Document

The first page of the document you are signing is shown in the browser window. There are several controls available for your use.

The screenshot shows the document viewing interface. At the top, there is a blue bar with the text 'Please review the documents below.' and an 'OTHER ACTIONS' menu. Below this bar, there are several icons for document controls: Zoom controls (plus and minus signs), Download (downward arrow), Print (printer icon), and Show/Hide page thumbnail (document icon). The main content area displays the 'Parking Application' form with a 'START' button on the left. The form includes fields for Name (Bob Stack) and Address, and a section for selecting a location to park at, with 'First Ave Garage' selected.

- In the center there are controls for zooming in or out on the current page, downloading all the pages as a PDF file, and printing the pages.
- The right side of the window has a show/hide page thumbnail option to show and hide a document map that shows the number of pages. You can select a page image to jump to that page.

Select **START** on the left side of the page to begin the signing process.

The action indicator on the left side of the page moves through the document, showing where information needs to be added, while a cue in the upper-left of the browser provides more information about the action you are expected to take for the current field. You can also place your cursor over a field to see any tips the sender has provided.

Select one radio button

Select the location you want to park at (select only one location):

CHOOSE

First Ave Garage

Uptown Garage

Hardy Building Garage

Fields that are outlined in red are required and must be filled out to complete the signing process.

Note: Some fields, such as signing date fields, are automatically filled in based on information available to the system. You cannot change or modify this information.

- To select a radio button or check box, select the appropriate radio button or check box. Note that you can only select one radio button in a group.
- To select an option from a drop-down list, select the list and then select the appropriate option.
- To add other information in a boxed field, type the requested information into the field and select **NEXT** or press the Tab key to continue.
- To sign or initial, select the **SIGN** or **INITIAL** field on the document.

Adopting your signature: The first time you select a **SIGN** or **INITIAL** field, you are asked to adopt your signature and initials.

Adopt Your Signature

Confirm your name, initials, and signature.

Full Name: Bob Stack

Initials: BS

Select Style Draw

Preview

DocuSigned by:
Bob Stack
1359F1658659478...

DS
BS

Change Style

By clicking Adopt and Sign, I agree that the signature and initials will be the electronic representation of my signature and initials for all purposes when I (or my agent) use them on documents, including legally binding contracts - just the same as a pen-and-paper signature or initial.

ADOPT AND SIGN CANCEL

To adopt your signature:

- First verify your name and initials are correct. If not, they can change them as needed. If you would like to change your name or initials, type the changes in the **Full Name** and **Initials** fields.
- Choose if you want to select a preformatted signature style or if you will draw your signature.

Note: Drawing a signature and initials can only be done if your browser is HTML5 capable and the sender allows it.

If you choose to use a preformatted style, you can choose **Select Style** to view and select a signature style.

The screenshot shows the 'Adopt Your Signature' dialog box. On the left, there is a form with the following fields: 'Full Name' (Bob Stack), 'Initials' (BS), and a 'Draw' button. Below the form is a 'Preview' section showing a signature block with the text 'DocuSigned by: Bob Stack' and a unique ID. At the bottom of the dialog are 'ADOPT AND SIGN' and 'CANCEL' buttons. On the right side of the dialog, there is a vertical list of four preformatted signature styles, each with a 'DocuSigned by:' label, the name 'Bob Stack', the unique ID, and a small preview of the signature style.

If you choose to draw your signature, select **Draw** to show the blocks for adding your signature or initials. In the **Draw your signature** or **Draw your Initials** block, draw your signature/initials using a mouse or, for a touch-screens, your finger or a stylus. If you make a mistake, select **Clear** to reset the block.

Note: You can return to the preformatted signature styles by choosing **Select Style**.

The screenshot shows the 'Adopt Your Signature' dialog box with the 'Draw' option selected. The 'Full Name' field contains 'Bob Stack' and the 'Initials' field contains 'BS'. Below the form is a 'Draw your signature' block with a large empty area for drawing and a 'Clear' button. At the bottom of the dialog are 'ADOPT AND SIGN' and 'CANCEL' buttons. The 'Preview' section is not visible in this view.

- Finally select **ADOPT AND SIGN** to adopt and save your signature information and return to the document.

5. Complete Signing

After you have added information to all the required fields and any signatures and initials, the actions move to the bottom of the browser.

You can stay, review the document, and make any changes to the information you have added to the required and optional information fields. After you are done reviewing the document, select **FINISH**.

Your signing information is saved and a message window stating that you have finished signing your documents is shown. You are given the option of downloading a PDF copy of the documents or printing a copy of the documents.

If you do not have a DocuSign account, you can sign up for a free DocuSign account and save the document in your account. If you already have a DocuSign account, you will be given the option to log in to your DocuSign account.

You can also just close the message window by selecting the **X** icon in the upper right corner. After closing the message window, the browser displays a website designated by the sender.

6. Done

Congratulations! You have successfully completed electronically signing your documents.

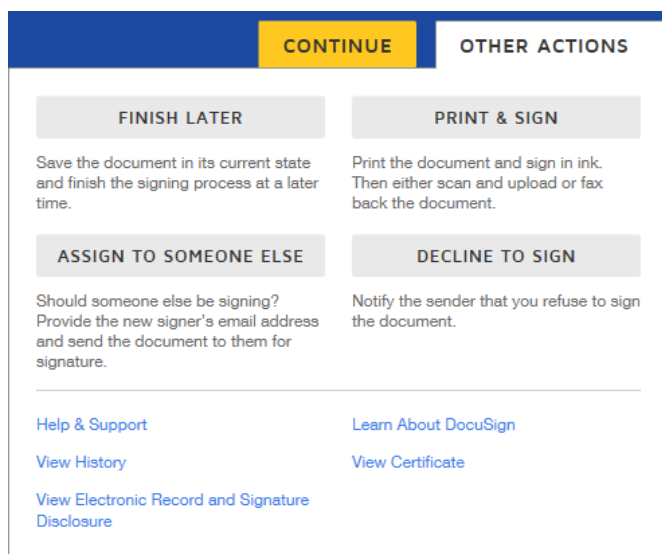
When all the signers have completed signing, you will receive an email confirming this and giving you the option to download a PDF copy of the completed documents.

For more information about DocuSign features, demos and supporting information, go to the DocuSign website.

Other Actions

This section provides more information about the other actions available to you when signing your documents.

Selecting **OTHER ACTIONS** shows the options available to you while you are signing your document. The options are:



FINISH LATER: This option lets you exit the signing process, while saving the information you have entered (signatures and initials are not saved). You can return to finish signing the document later by using the link in the email notification.

PRINT & SIGN: This option lets you print and sign the document on paper. See the *Signing and Uploading or Faxing Your Documents* guide on the DocuSign website for more information about using this option. In some cases this option might not be available.

ASSIGN TO SOMEONE ELSE: This option can be used to send this document to another person when they should be the signer. You will be asked to provide the new signer's name,

email address and a reason for changing the signer. The reason for changing the signer is sent to person that sent the document, along with the new signer's name and email.

DECLINE TO SIGN: This option lets you decline to sign the document. You might be asked to provide a message for the person that sent the document telling them why you have declined to sign.

View History: This option shows the sending and signing history for the documents.

View Certificate: This option opens a new browser window with a PDF version of the certificate of completion, which includes information about the events, and the disclosure. The PDF can be saved or printed.

View Electronic Record and Signature Disclosure: This option shows the sender's Electronic Record and Signature Disclosure.

Learn About DocuSign: This link takes you to the DocuSign University page, which has more information about using DocuSign and what features are available.

Help & Support: This link takes you to the DocuSign Support page.