

DocuSign Instructions for PCard Forms

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Role Responsibilities

Signer	Ability to enter information into designated fields of PCard template forms and electronically sign (e.g. new applicant). Available to all active OSU employees.
Sender	Ability to enter information into designated fields of PCard template forms, electronically sign and designate to other signers (e.g. Service Center administrator). Available to all active OSU employees that have completed the eSignature Sender course in BuckeyeLearn .
Author	Ability to create and edit templates in DocuSign. Available to all active OSU employees that have completed the eSignature Author course in BuckeyeLearn . Note: DO NOT upload and/or create new templates for the PCard Application & PCard Maintenance Form. You must use the Shared Templates that are authorized by the PCard Office .

How to become a Sender

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- Before you can send (submit) PCard Applications & PCard Maintenance Forms through DocuSign, you must take the **eSignature Sender** course in [BuckeyeLearn](#).



eSignature Sender

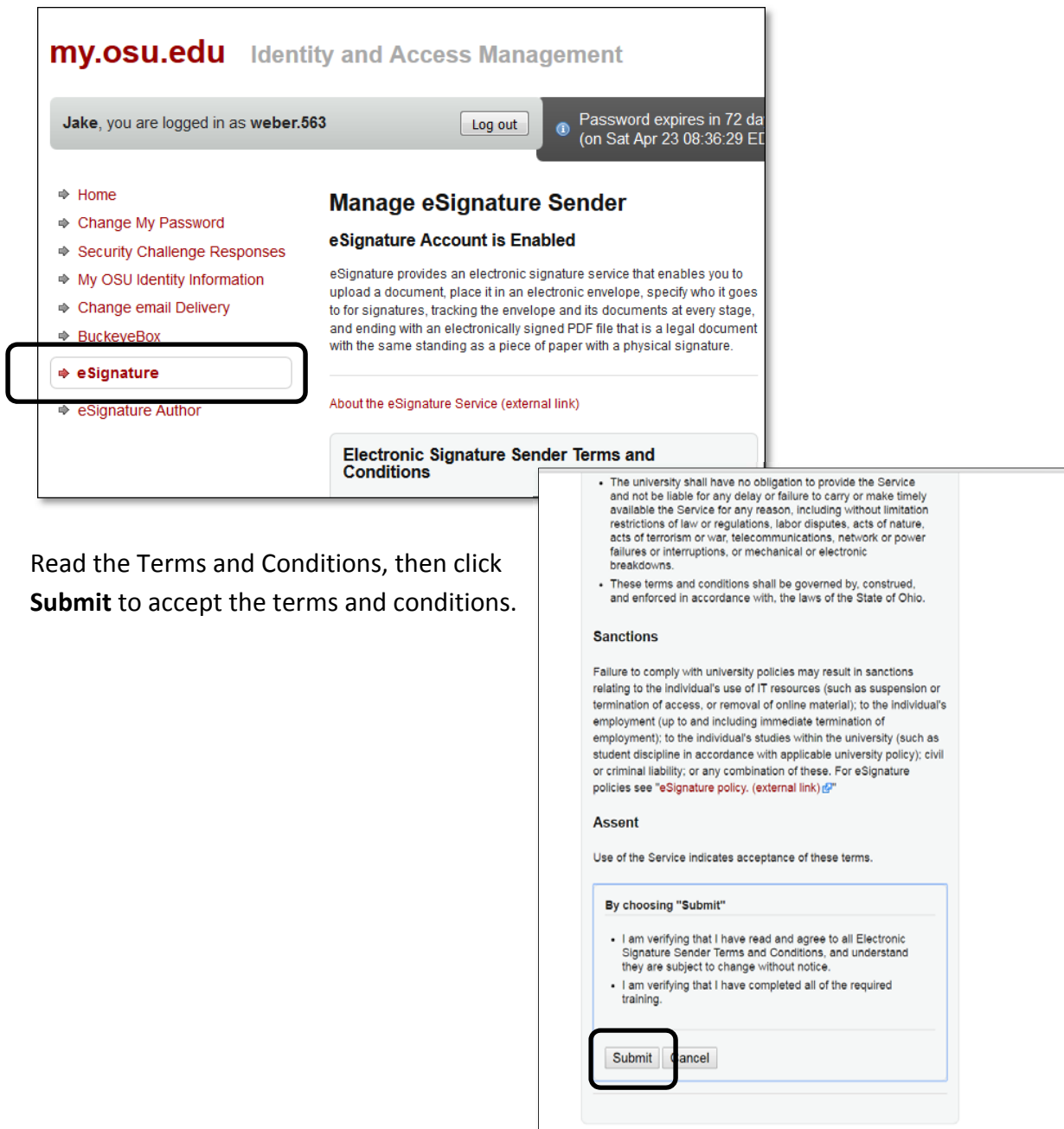
Curriculum · Office of the Chief Information Officer · 30 minutes

Assign

This curriculum is for eSignature Sender training. You must complete the course and pass the assessment with a score of 70% or higher to complete this curriculum. After you have completed this course, you will be able to: explain who can use eSignature; explain the permitted uses of eSignature; list the policies that apply to eSignature; describe your responsibilities for ensuring the security of eSignature and the data you use in it; request the sender role; and send a document using eSignature

For information on how to use this course as well as accessibility instructions and options, review How to Use OCIO Training: <https://it.osu.edu/assist/BuckeyeLearn/Instructions>.

- After completing the course, you must log into **my.osu.edu** to accept the Electronic Signature Sender Terms and Conditions.
- Click the **eSignature** link from the menu on the left (see image below)

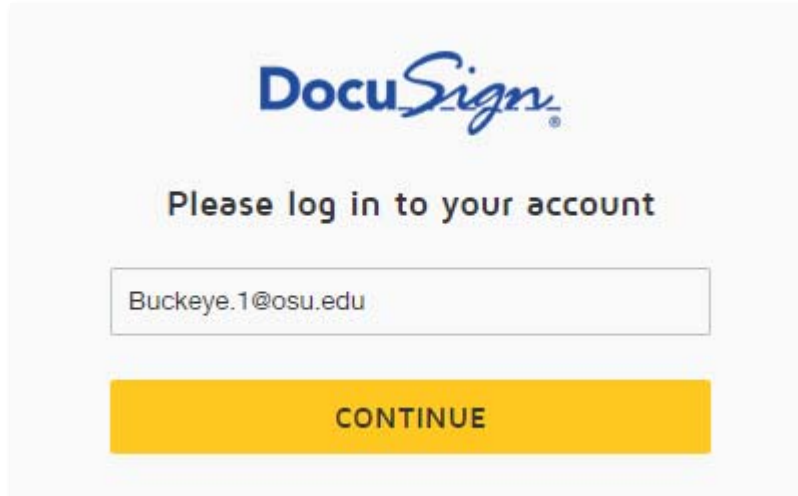


- Read the Terms and Conditions, then click **Submit** to accept the terms and conditions.

- After accepting the Terms and Conditions, you will receive an email from OCIO stating that they have received your request to become an **eSignature Sender**. You will receive a second email from OCIO when your request has been completed (typically within 24 hours). Once you have received the confirmation email, you will be able to send documents thru DocuSign

DO NOT create your own templates – only PCard shared templates will be accepted by the [PCard Office](#).

- Go to www.docusign.net or click the link to the appropriate form on the [PCard Webpage](#).
- This will direct you to the DocuSign login page.
- Enter your full OSU email address (e.g. Buckeye.1@osu.edu) , click **Continue**



The image shows the DocuSign login interface. At the top is the DocuSign logo. Below it, the text reads "Please log in to your account". There is a text input field containing the email address "Buckeye.1@osu.edu". Below the input field is a large yellow button with the text "CONTINUE" in black capital letters.

- You will be directed to the OSU login page, where you will be required to re-enter your OSU Username (name.#) and password.
- Click **Login**

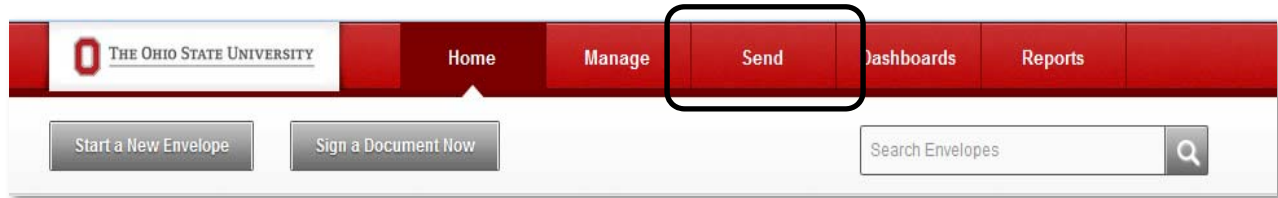
Login Required

A login is required to access the requested service.

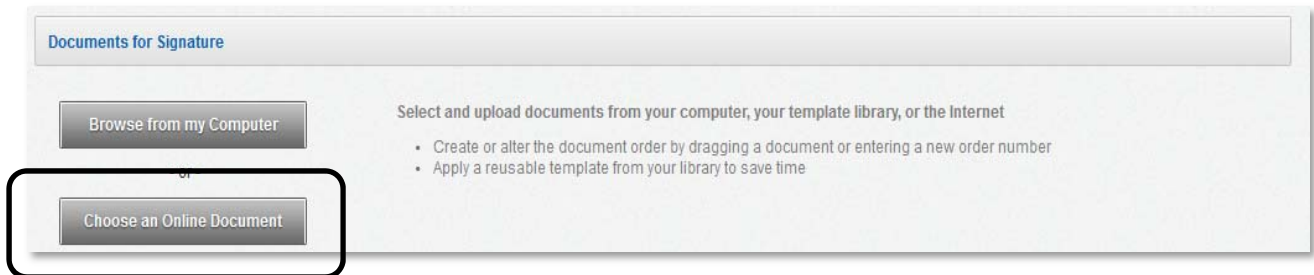


The image shows the OSU login form. It has a dark header with the text "Login Required". Below the header, there is a message: "A login is required to access the requested service." The form contains three input fields: "Ohio State Username" with the value "Buckeye.1" and a hint "Enter your Ohio State Username (lastname.#).", "Password" with masked characters "*****", and "Is this a private computer/device?" with radio buttons for "Yes" (selected) and "No". A red "Login" button is at the bottom.

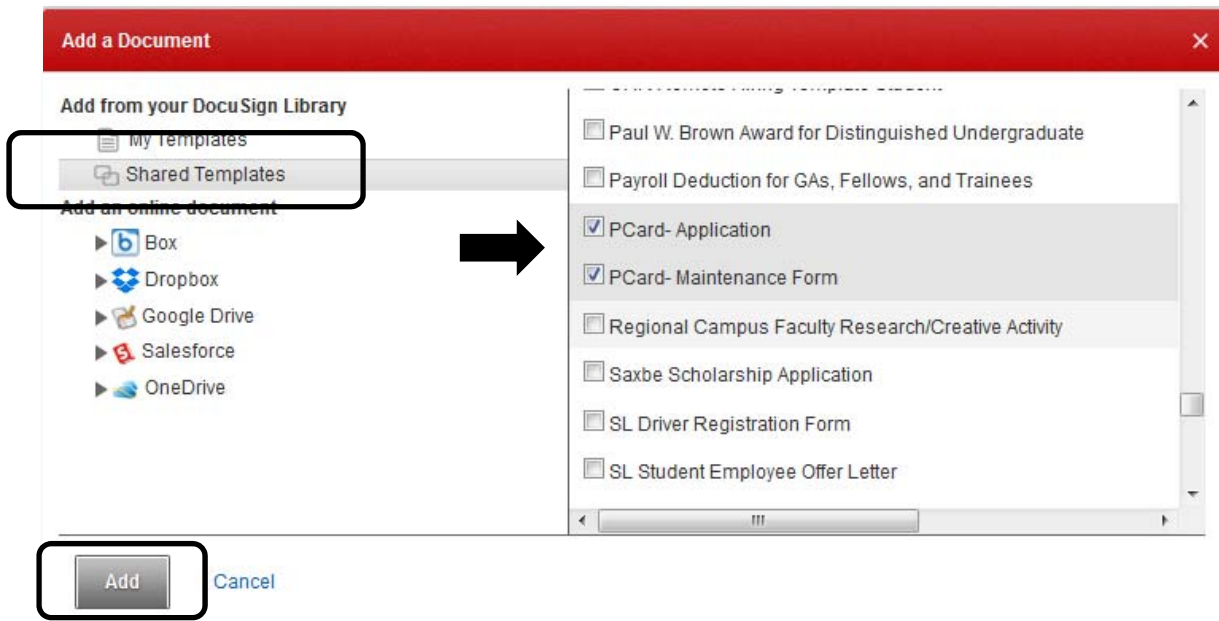
- On the OSU DocuSign Home page, click the **Send** button at the top of the page.
 - If the Send button is not visible, then your **Sender** access was not setup correctly. Contact OCIO (8-help) for assistance.



- Under Documents for Signature, click **Choose an Online Document**



- This will prompt a popup window to appear (be sure Pop-up Blockers are turned off). Click the **Shared Templates** link to bring up a list of forms that have been uploaded to DocuSign.
- From this list, select the PCard Template that you would like to submit (**PCard-Application** or **PCard-Maintenance Form**) and then click the **Add** button in the lower left corner

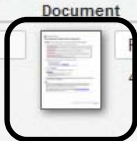


DO NOT create your own templates – only PCard shared templates will be accepted by the [PCard Office](#).



Before starting the template, consider the following important items:






- **Do I have all the critical information needed to complete and submit the form?**
 - Click the **Document** template in image format to review instructions and required information.
- **Will I need to attach any additional information?**
 - Both the PCard Application and PCard Maintenance Form templates provide a limited number of fields for entry of reallocators and approvers. Additional reallocators/approvers must be added by attachment prior to hitting SEND.
 - Click the Browse from my Computer button to select the appropriate document(s) to attach (e.g. List of Reallocators & Approvers).
- **Do I know who the authorized recipients are for signature/approval for my area?**
 - Check with your applicable Service Center.

Order	Document	Document Actions
1		PCard Application Pages

Buttons: **Browse from my Computer**, **Choose an Online Document**

Starting the Template

1. Establish recipient and routing workflow for signature/approval by entering the email addresses of the appropriate recipient for each line:
 - Line 1: PCard Applicant (Cardholder/Manager) - required
 - Line 2: Department Approval - optional
 - Line 3: College/VP Senior Fiscal Officer - required
 - Line 4: PCard Office - internal
 - Line 5: Service Center - optional

1	Email (required)		PCard Applicant (require
1	Email (required)		PCard Manager/Holder (i
2	Email (required)		Department Approval (op
3	Email (required)		SFO (required)
4	pcard@osu.edu		PCard Office
5	Email (required)		Service Center (required;

Note: If there is an X next to the recipient line, this signature is not required by the [PCard Office](#). If your Service Center does not require the signatures of these optional recipients, you can remove them from the routing workflow by clicking the X to the right of that line to delete the row (pop-up warning will validate)

Order	Email	Name	Action	Identify
1	Email (required)	PCard Applicant (require	Sign	Email
2	Email (required)	Department Approval (op	Sign	Email
3	Email (required)	SFO (required)	Sign	Email
4	pcard@osu.edu	PCard Office	Sign	Email
5	Email (required)	Service Center (required	Receive a copy	Email

2. If you want to add a message to the Recipients, you can do so in the **Email Message** section

Please enter a personalized subject and message so the recipient can verify that the signing request is legitimate.

Email Subject to All Recipients
Please DocuSign this document: PCard Application

Email Message to All Recipients

Customize email language for each recipient

Add a Note to PCard Applicant

3. Click the **Next** button at the bottom of the page to proceed to the Application or Maintenance Form.

Next Send Now <Go Back Save Draft | Discard Changes

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4. Complete the Application or Maintenance Form in full as prompted or allow the next recipient to add/edit information. Remember attachments can still be added and recipients can be changed by clicking the <Go Back button.

Submitting the Template

1. When ready to route to next recipient, click **Send**

Send Preview <Go Back | Save Draft | Discard Changes

Receipting the Template

1. Once all of the required recipients have electronically signed the template form, you will receive an email notification stating that your document has been completed thru the DocuSign process workflow.
This does not mean that the PCard Office has processed your request.
2. When your request has been entered, the [PCard Office](#) will send you an email to verify the status.