DocuSign Instructions for PCard Forms

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Role Responsibilities

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<tr>
<td>Signer</td>
<td>Ability to enter information into designated fields of PCard template forms and electronically sign (e.g. new applicant). Available to all active OSU employees.</td>
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<tr>
<td>Sender</td>
<td>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.</td>
</tr>
<tr>
<td>Author</td>
<td>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 &amp; PCard Maintenance Form. You must use the Shared Templates that are authorized by the PCard Office.</td>
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How to become a Sender

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

![Image of eSignature menu](image)

• 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

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
• On the OSU DocuSign Home page, click the New button and then select Send an Envelope.
  o If the New button is not visible, then your Sender access was not setup correctly. Contact OCIO (8-help) for assistance.

• To add the template, click Use a Template.

• This will prompt a popup window to appear (be sure Pop-up Blockers are turned off). Click the Shared with Me 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 Selected button in the lower left corner.
Completing Template

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.
  - If needed, click the Upload button to select the appropriate document(s) that you want 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.
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 - required
   - Line 5: Service Center - optional

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

3. Click the **Next** button in the top right corner of the page to proceed to the Application/Maintenance Form.

4. Complete the Application or Maintenance Form in full as prompted or allow the next recipient to add/edit information.
   - If you are an Author and wish to fill in the form prior to sending, select the field that you would like to fill in. This will cause a text box to pop-up in the right hand column. This is where you will fill in the information that you want to appear on the form.
5. **Helpful Tip**: If you need to correct the recipients/message or add additional documents, you can do so before sending by clicking the Actions dropdown menu in the top right corner

![Actions dropdown menu](image)

**Submitting the Template**

1. When ready to route the form to next recipient for signatures/completion, click **Send**

![Send button](image)

**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. *This does not mean that the PCard Office has processed your request.*

2. When your request has been processed, the **PCard Office** will send you an email to verify the status.