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

- 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)

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](http://www.docusign.net) or click the link to the appropriate form on the [PCard Webpage](http://www.docusign.net).
- 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 **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.

![DocuSign Home Page](image)

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

![Choose an Online Document](image)

• 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

![Add a Document](image)

**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.

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
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 Email Message section

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

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
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.