# 1. <u>LOG IN</u>

**a.** To get started, log into your DocuSign account by clicking on the below embed tab



**b.** Enter your UHCL email id as stated in the example. It will direct you to another page to enter credentials.

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Back Next

For any questions, please email us to docusign@uhcl.edu.

**c.** Enter your UHCL credentials as required and sign in to the DocuSign.



# 2. USING THE TEMPLATE

**a.** Go to Templates Tab.

Home	Manage	Templates	Reports

**b.** Go to Shared Folders and under that select Property Management Forms.



c. Click on USE button for using each form respectively. In this case we will use the Certification of Departmental Physical Inventory UHCL.

Templat	es Reports					
Proper	ty Management Forms			Q Searc	ch Shared Folder	
	Name 🛓	Owner 🛓	PowerForms	Created Date 👙	Last Change 🔻	
	Asset Update Form UHCL	Dharmik Nanavati		8/31/2022 03:50:02 pm	8/31/2022 11:25:14 pm	USE <b>v</b>
□ ☆	Departmental Property Custodian UHCL Eligible for matching	Dharmik Nanavati		8/31/2022 10:09:59 pm	8/31/2022 10:56:55 pm	USE <b>v</b>
□ ☆	Authorization Off Campus Property UHCL Eligible for matching	Dharmik Nanavati		8/31/2022 10:09:53 pm	8/31/2022 10:55:40 pm	USE <b>v</b>
□ ☆	Certification of Departmental Physical Inventory UHCL Eligible for matching	Dharmik Nanavati		8/31/2022 10:09:47 pm	8/31/2022 10:15:14 pm	USE 🔻

- d. Under the Add recipients, enter the recipient's name and email address.
  - You cannot delete or ignore any recipients while using this form.
  - It is required to fill all the details of respective individual except for Asset Management Personnel.

# Add recipients

	Department Property Custodian	🖉 NEEDS TO SIGN 🔻	CUSTOMIZE 🔻
	Name *		
1	Email *		
	Department Head/ Designee	MEEDS TO SIGN V	CUSTOMIZE 🔻
	Name *		
2	Email *		
	College/Division Business Administrator	🖉 NEEDS TO SIGN 🔻	CUSTOMIZE 🔻
	Name *		
3	Email *		
_			

University Property Management/Asset Management Personnel	NEEDS TO SIGN V CUSTOMIZE V
Name *	
Dharmik Nanavati	
Email *	
hilling	

# Add envelope custom fields

# Add message

#### Email Subject \*

Please Sign Digitally: Certification of Departmental Physical Inventory

Characters remaining: 29

#### Email Message

Please review and sign department annual physical inventory form.

Characters remaining: 9935

### e. When ready, Click Send to send your form to respective individuals.

EDIT SEND 🔻
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# 3. SIGNING THE TEMPLATE

### a. REVIEW THE DOCUSIGN EMAIL -

Open the email and review the message from the sender. Click REVIEW DOCUMENT to begin the signing process.

### b. AGREE TO SIGN ELECTRONICALLY –

Review the consumer disclosure and select the checkbox I agree to use Electronic Records and Signatures. Click CONTINUE.

### c. START THE SIGNING PROCESS –

- Click the START tag on the left to begin the signing process. You are taken to the first field requiring action.
- Enter all the required fields.
- Click the SIGN tag. You are asked to Adopt Your Signature.

### d. VERIFY YOUR NAME -

Verify that your name and initials are correct. If not, change them as needed.

### e. ADOPT A SIGNATURE -

- Accept the default signature and initial style, or
- Click SELECT STYLE, and select a signature option.

### f. SAVE YOUR SIGNATURE -

Click ADOPT AND SIGN to adopt and save your signature information and return to the document.

### g. CONFIRM SIGNING -

When you finish clicking all signature tags in the document, confirm signing by clicking FINISH.