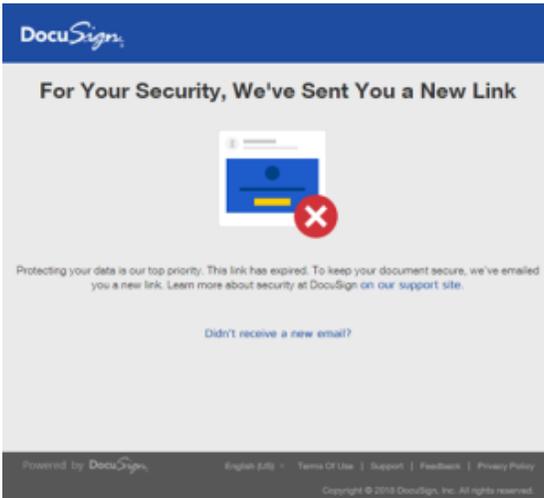


DocuSign Tips

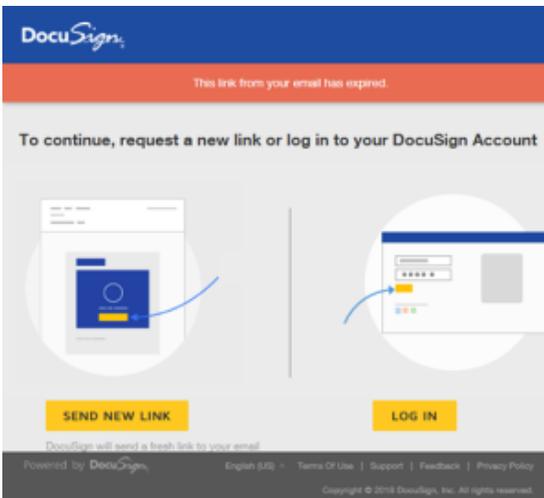
1. What happens when you start a form and then click "Finish later"?

- This will cause you to exit the process, saving any information entered.
- You can continue the form at any time by accessing it in your *Inbox* or *Action Required* and clicking the "Sign" button.

2. **Link Expiration Notices:** The link to the DocuSign form that is provided in the email notification message expires quickly - after 5 clicks or 48 hours. (This is for security purposes) However, the first time you or your faculty member click on an expired link it will **auto send** a new email notification and present a page advising that the link has expired and that a new notification has been sent.



Subsequent attempts to access an expired link will lead to a page where you can request "Send new link." When clicked, this will send a new notification with a fresh link to the email address entered by the coordinator. Alternatively, the user can sign into DocuSign via Single Sign-On and view the document there without needing to request a new link (this is only possible if the user logs in using his/her active directory @ucsd email address).



3. Clarification on entering email addresses:

- When inputting faculty email addresses, please use the university/institutional email address for verification purposes. For UC San Diego faculty it does not *need* to be the active directory address as they should not need to access a DocuSign account. They only need to link to the form, sign it, and exit.
 - However, an active directory email address is needed if the signer wants to log into his/her UC San Diego DocuSign account. See below (and see #6),
 - This will be important for department/program chairs/directors who are required to sign multiple forms. Instead of waiting for each individual link provided in the email notifications, they may prefer to log into their account and see a list of all pending forms (see #6).
- For coordinators it is important to use the active directory email address since coordinators do need to log into their DocuSign account in order to track forms that have been created. We realize there are issues with this functionality and we are working on it.

4. Clarification on Final Report Form vs Dissertation/Thesis Signature page (JDP students only)

- JDP students at SDSU who complete a dissertation also need to send a DocuSign form called "Dissertation/Thesis Signature Page." This should not be confused with the Doctoral Final Report Form sent via Adobesign. Please let your faculty know that they can expect to receive these 2 forms for each committee they are on.
- The subject line for the signature page is: "Dissertation/Thesis Signature Page - JDP - [[Student Name]]"

5. Direct access to DocuSign for required faculty signatures

- Once a DocuSign form has been sent by the coordinator, faculty may access it directly by logging in using their active directory credentials at docusign.ucsd.edu (this will only work if the email address used in the form is the AD address - see #4 above).
- The faculty will see a list of pending documents when they click on "Action Required" as shown below

6. Alternative Signing Method Security Code Access (<https://support.docusign.com/en/articles/Alternative-Signing-Method-Security-Code-Access>)

When you receive an email inviting you to electronically sign a DocuSign document, a 33-character alphanumeric security code appears at the bottom of the email. This string of letters and numbers is a unique ID for the document you received. Use this code to get the document to sign, save, and print.

Note: You CANNOT access the document by entering this string in a search bar. You must go to the DocuSign website and click the Access Documents link.

Alternate Signing Method
 Visit [DocuSign.com](https://www.docusign.com), click 'Access Documents', and enter the security code:
 0872BFB8FF1944CB9A775CAA466194451

To use the security code

1. Go to www.docusign.com.
2. At the top of the page, click **Access Documents**.



3. Copy the security code from the email and paste into the Security Code text box, and click **GO**.

The document associated with this unique ID opens. You can now sign, download and save, print, and perform "More" actions on the document, depending on the permissions the sender has given you.

Additional resources on DocuSign can be found at the links below.

Regarding the expiration of links: <https://support.docusign.com/en/articles/Do-envelope-notification-emails-expire>

The quick expiration of the links is a security measure. To extend the expiration we would need to implement user authentication measures which would require faculty to authenticate themselves via phone, SMS, or SSO login. We did not want to implement this additional barrier to accessing the forms. <https://support.docusign.com/en/guides/ndse-user-guide-recipient-authentication>