San Francisco State University
We Make Great Things Happen
DocuSign for Advancement

Advancement Templates for Forms and Gift Agreements
The Agenda

- Introduction to DocuSign@SFSU
- Policies
- Getting Started
- University Advancement Templates
- Creating Gift Agreement Envelopes in DocuSign
- Resources
Introduction to DocuSign@SFSU
DocuSign@ San Francisco State Home Page

Administration & Finance

DocuSign@SFSU

Winter 2019

TRAINING!
Customized Online & In-person trainings are regularly offered to SFSU faculty and staff:
- Receive hands-on DocuSign education
- Get familiarized with DocuSign terminology

Result: Participants are ready to use DocuSign for campus transactions.

HIGHLIGHTS:
- 40 DocuSign training sessions have been delivered
- 285 Employees completed the trainings
- 70% Overall attendance rate

DocuSign Users
332 registered DocuSign accounts

Most Active Departments:
- Housing, Dining, and Conference Services
- Enterprise Risk Management
- Fiscal Affairs

DocuSign Templates
1. Alcohol Clearance Form (Enterprise Risk Management)
2. Trust and Special Project Agreement (Fiscal Affairs)
3. Chartfield Value Request Form (Fiscal Affairs)
4. CARMA Acknowledgement Form, General Reporters (Human Resources)
5. CARMA Acknowledgement Form, Limited Reporters (Human Resources)
6. Back Notice (Human Resources)
7. Employment Verification Request (Human Resources)
8. External Advertisement Approval Form (Human Resources)
9. Recruitment Request Form (Human Resources)
10. Recommendation to Hire Form (Human Resources)

University Advancement

From 10/15 to 11/14:
- 167 DocuSign transactions were sent
- 64% completed within a day
- Over 1,000 pages were saved
Policies
Policies for DocuSign and Electronic Signatures

NOT ALL FORMS ARE AUTHORIZED FOR USE!

- Link to University Policies: ITS Electronic Signatures Practice Directive – this outlines that only approved documents may be used and nothing containing Level One data.

  - List of Approved Templates does not yet include templates for Advancement but QA will update shortly.
  
  - Just because we have the ability to use DocuSign for Forms does not mean every form has been approved by Quality and Risk Management for use with DocuSign.
    
    - Advancement approved forms are the Gift Acceptance Form, Gift-in-Kind Acceptance Form and Donor Intent Form (under construction).
    
    - These forms will be templates in the University Advancement Shared folder in DocuSign.
    
    - Please do not use non-approved forms with DocuSign. They have to be cleared by Risk Management, QA and a panel of stakeholders.
    
    - We are working on EFA forms (SPA will be UCorp’s)
    
    - If you would like to suggest a form for use, please contact Caroline or QA team.

Remember – You may always fill out a GAF manually and upload it just for the signature routing!
Getting Started
1. Attend DocuSign trainings hosted by Quality Assurance
   • Recorded 45 minute training session Here: Link to DocuSign Fundamentals Training on Box.com
   • Future Zoom trainings dates listed on this DocuSign page under Events:
     - Docusign.sfsu.edu/home
     - Clicking on link takes you to a registration page – you must preregister!

2. Add your name to the Contacts listed in the Main DocuSign page – Important!
   Instructions on How to add-yourself-contacts-list
   If you do not do this step, you will not be able to access the templates for Advancement because it is a private folder.
Bookmark your DocuSign@San Francisco State Home Page for Easy Access

SF State Global Login
Login to SF State Gateway with your San Francisco State ID and gain seamless access to multiple online systems and applications.

Please log in to your account

cjohn@stsu.edu

CONTINUE

No account? Sign up for free

Are you having trouble accessing Human Resources and Campus Solutions, Faculty Center or Student Center?

SF State ID or E-mail
SF State Password

Login
DocuSign Home Page

Once you log in, you will land here:
University Advancement Templates
University Advancement Templates
Remember: You may always fill out a Gift Acceptance Form manually and just use DocuSign for signatures on one-offs.

1. Click on New
2. Click on Use a Template
3. Click on Shared Folders – Choose University Advancement
4. Click on Gift Acceptance Form
5. Click on Add Selected
6. Set Signing Order and add a message to recipients.
7. Click on Advanced Options to set reminders!
8. Click on Save to save privileges, reminders, expiration, etc.
9. Then hit NEXT in upper left hand corner.
10. Fill out writable fields in the form and hit SEND
1. Make sure you know who needs to sign the template in the correct order before starting.
2. Order of signers is exactly as it would be for hardcopy. For GAF and GIK, DOD or Fundraiser signs first, then AVP for Development.
3. Utilize the Reminder features and set reminders for every 24-48 hours until signed.
4. Please don’t change the branding settings!
5. If you want to use your own Gift Acceptance Form that you filled out, you may upload it as a word docx or a .pdf and just add the signature part.
   • Just please make sure you fill out all fields and add the Advancement Gift Processing signing group to get a copy.
Gift Agreement Envelopes
Procedures for Gift Agreement Envelopes

• Once the agreement is edited, reviewed and signed off as good to go, you may upload a copy to DocuSign.
• We are only using DocuSign for signatures on agreements – this is the big difference from the templates where all the writable fields are open for the user.
• We wanted to start with signatures and then as time goes on and we get more familiar with the procedure, we can open up the writable areas in a template format for DOD’s and donors.
• If you want the donor to hard sign the document because you are not sure of their capability to use DocuSign, they can hardcopy sign and then you may scan it in and upload a .pdf to create an envelope for SFSU internal signature distribution.
• Always set the donor to sign first or as number 1, then the internal signatures may all be level 2 unless there are special circumstances.
• Gift Agreement and MOU Process Documents for hardcopy and DocuSign are here: Z:\Development_Shared\Advancement Services\Gift Agreement Templates
Creating a Gift Agreement Envelope

1. Login and click on NEW
2. Click on Send an Envelope
3. Click on Upload to upload a .pdf or word .docx of the agreement
   a. Make sure you can see the document appear in the window
4. Add recipients to the Envelope and check “Set Signing Order”
5. You may select admins to be “Viewers”.
6. Create message to all recipients or customized message to each.
7. Under “Advanced Options” – Set reminders, expirations, warnings!

NOTE: Reminders extremely important to the success of your envelope being routed and signed in a timely manner.

Actions drop down gives you options to save and come back later!

Click NEXT when ready to proceed.
8. Drag and drop the standard signature field and date signed to the signature line and date line on the agreement.
9. Click on the name on the upper left hand corner to select your first signer.
10. You will see a list of all of your recipients. **Note that each person has their own color associated with their fields.**

When it is complete, click SEND.
Review and Sign Documents in Docusign

Review-and-sign-document-docusign
Use Comments to Communicate with Sender

If you decline to sign, it nullifies the envelope and deletes it.

Click on continue to review document
Click on Sign and then Finish
Reporting

- Currently the process is a bit new to us and I don’t have examples for the reporting as of yet but it does have scheduling features, etc.
- Looking for volunteers/power users to help with the reporting and tracking features for a follow-up session to see how the process is going.
- May have Quality Assurance come back and do a session on reporting and tracking for us.
  - We can also use that session as a trouble shooting session or feedback session.
• Getting Started
• How to Guide
• FAQ’s
• Log in to DocuSign
• Training Dates
• Support & Resources
• How to contact DocuSign Directly
Support & Resources
• Submit a Service Ticket for Support
• To request a Risk Assessment of a form owned by your department, please complete the Electronic Signature Risk Assessment Form
• For questions, please contact qateam@sfsu.edu
• Contact DocuSign directly at 1-800-379-9973 for after hours customer support
Questions?
Contact Us

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