



DocuSign PowerForm Initiation/Completion Instructions

1. If you received an email to complete a DocuSign form, please skip to step #6. If you are initiating a DocuSign PowerForm from a link, please start at step #2.
2. A “PowerForm” is a DocuSign form that you begin using a link. An “initiator” is the person who starts the PowerForm. Each “role” refers to a person that needs to sign the document, and each role has specific things to do on the form (filling in information, reviewing, approving/declining, signing, etc.) Make sure you are the correct party to initiate the PowerForm. The PowerForm initiator is responsible for filling in the names and email addresses of any blank roles on the form. **Please make sure to route the form to the same people you would when you used the paper version of the form (correct dean, VP, etc.)**
3. Click on the PowerForm link to initiate the form.
4. When the PowerForm page appears, complete any blank name and email information of any roles on the form. (See below example for blanks that would need to be filled in.)

A screenshot of a DocuSign PowerForm titled "PowerForm Signer Information". The form contains instructions and input fields for two signing roles. The first role is "Program Director" and the second is "Student". Each role has fields for "Your Name:" and "Your Email:". The form is enclosed in a light blue border.

PowerForm Signer Information

Fill in the name and email for each signing role listed below. Signers will receive an email inviting them to sign this document.

Please enter your name and email to begin the signing process.

Your Role:
Program Director

Your Name:

Your Email:

Please provide information for any other signers needed for this document.

Your Role:
Student

Your Name:

Your Email:

If you don't see a role, it is likely because that role has been hard-coded and locked on the back-end. For example, if a form is always supposed to be signed by a certain person, it will be locked to prevent changes. You will not see it on the PowerForm but it will route appropriately.

5. Click Begin Signing

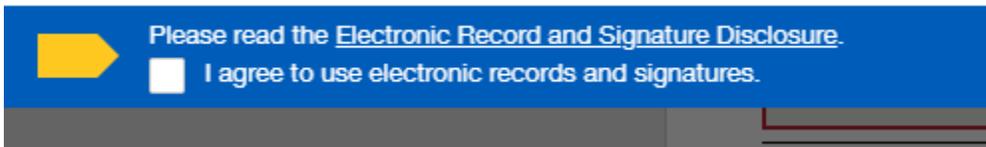


6. If you are the first person that is supposed to receive the form (or you received an email from DocuSign requesting you to review/sign a document), another window should open up giving you the option to complete your part of the form:

Please Review & Act on These Documents



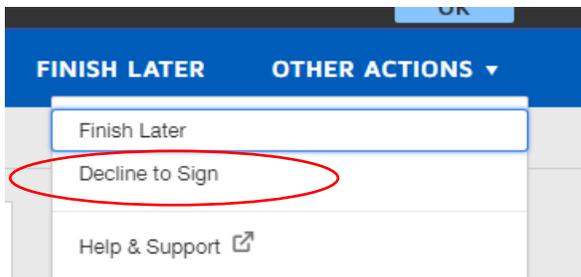
7. Check the box to agree to use electronic signatures:



8. Select Continue



9. Press Start at the top left and it will take you to the first required field to complete. Each role has actions to perform, which may include filling out information, simply signing off, or approving/declining. Complete the actions required for your role. Any items that are mandatory are outlined in red and you will not be able to sign the document without completing those fields. Also keep in mind that you may need to complete *optional* fields depending on the form, so review carefully before signing. **Once a form has been signed and closed, that signer cannot change any of the information submitted on the form.**
10. If you are not the initiator and are required to sign or approve/decline the form, please review it carefully. If the form is filled out incorrectly and should not be signed, please select **Decline to Sign** at the top right:



That will void the form and parties who were required to sign will receive an email notifying them that the form has been declined (a box will appear that will allow you to enter a reason why you declined to sign it).

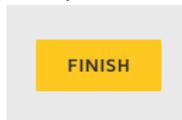
If you receive a form for signature but are not the proper signer, please do not sign it. Close the form out and contact the sender to ask them to have your name changed to the proper signer. The sender may have to contact their DocuSign administrator to change the signer.

11. If you come across a field that you cannot complete because you don't have the necessary information at your fingertips, you can click the Finish Later option at the top right:

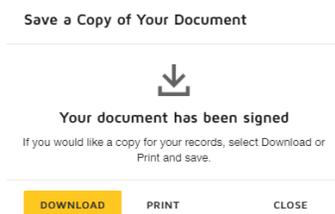


You can then receive an email that will allow you to re-enter the document and finish completion. Please do not sign before you complete all information.

12. After you have completed filling in all of the required information and providing your signature if necessary, click FINISH:



13. You will be given the option to save/print the document (all parties will receive a completed copy after the last signature so you don't necessarily have to keep a copy at this point).



14. You will receive a message stating your document is complete:



Click CLOSE.

15. The form will automatically be forwarded to the next person required to sign.
16. Once everyone signs the form, all parties will receive a PDF copy of the form to download and/or print.

FAQs:

What if I realize I provided incorrect information after I have signed and closed out the form?

If you know who the next person receiving the form is, you can contact them and ask them to decline to sign it. That will void the form and you can start another one. Please do not start another form without

making sure the original form is voided. If you do not know who the next person receiving the form is, contact your DocuSign administrator.

What if I received a form for signature, but I am not the proper signer?

Do not sign it. Close the form out and contact the sender of the form to ask them to have your name changed to the proper signer. The sender may need to contact their DocuSign administrator to have the change made.