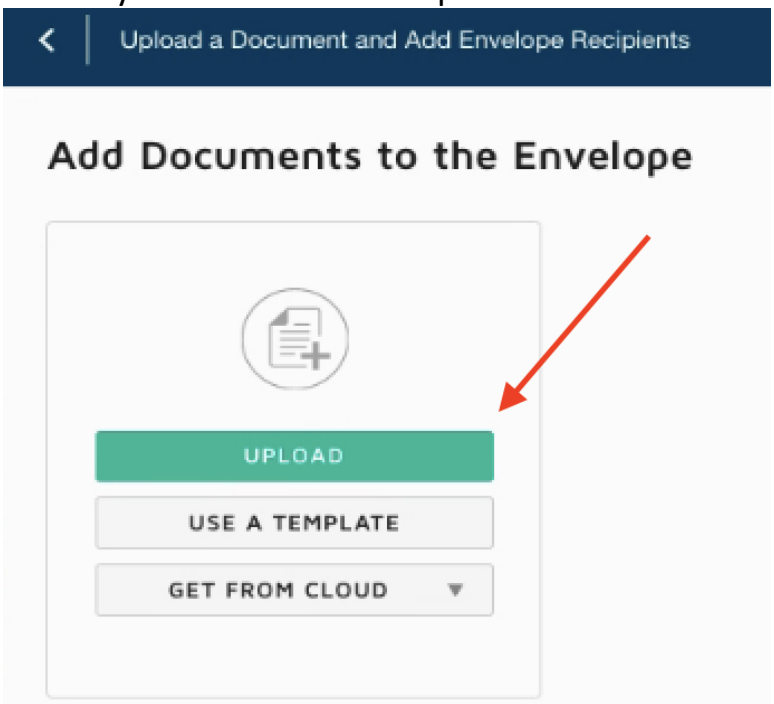
DocuSign Instructions

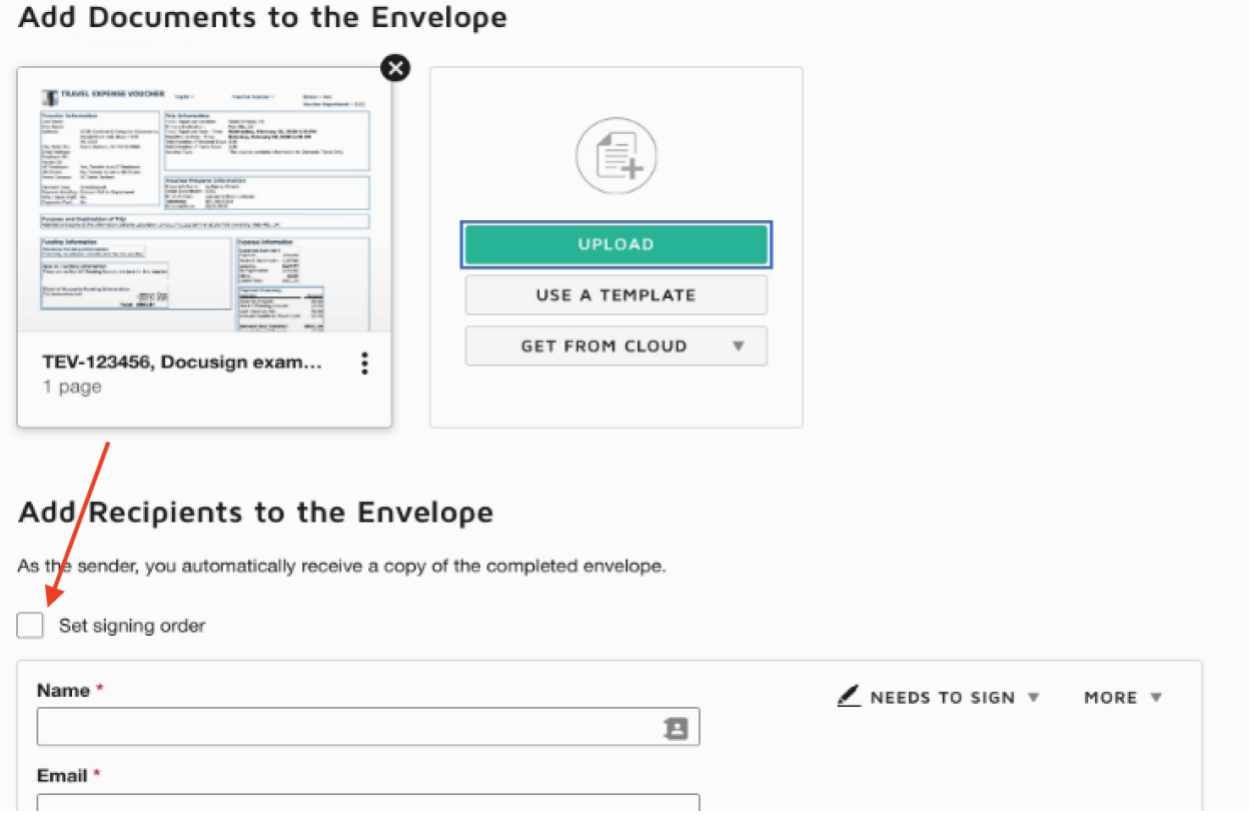
*Review the following instructions for general departmental Docusign procedures. If you have specific questions regarding signature order or reviewing procedures contact the CAO

1. Go to UCSB Docusign
   https://docusign.lsit.ucsb.edu/using-docusign#project
2. Login using your UCSB NetID email
3. Once you are logged in click “new”
4. Select “Send an Envelope” from the drop down

5. To add your reimbursement packet that needs to be signed, click “upload.”

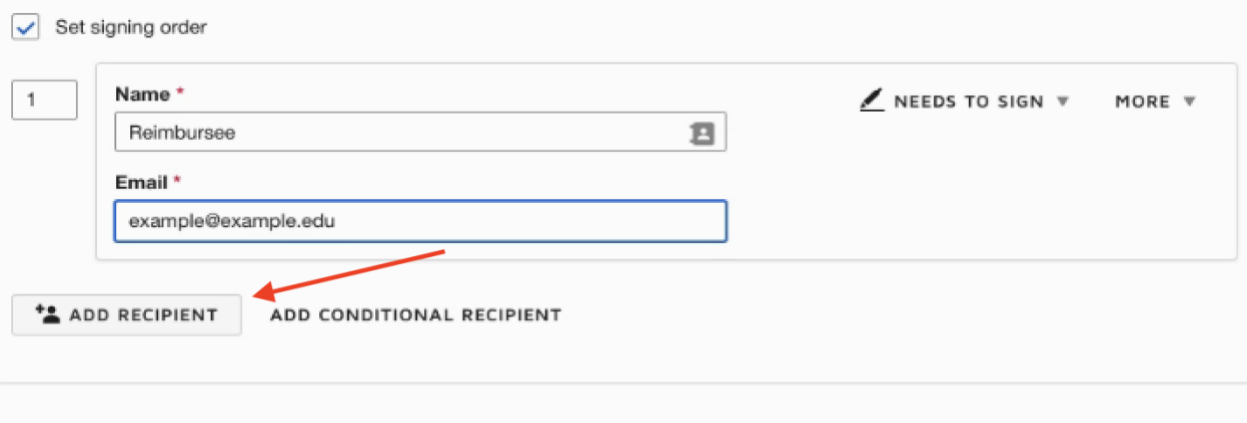


6. After your packet has fully loaded, scroll down and click the “set signing order” box.

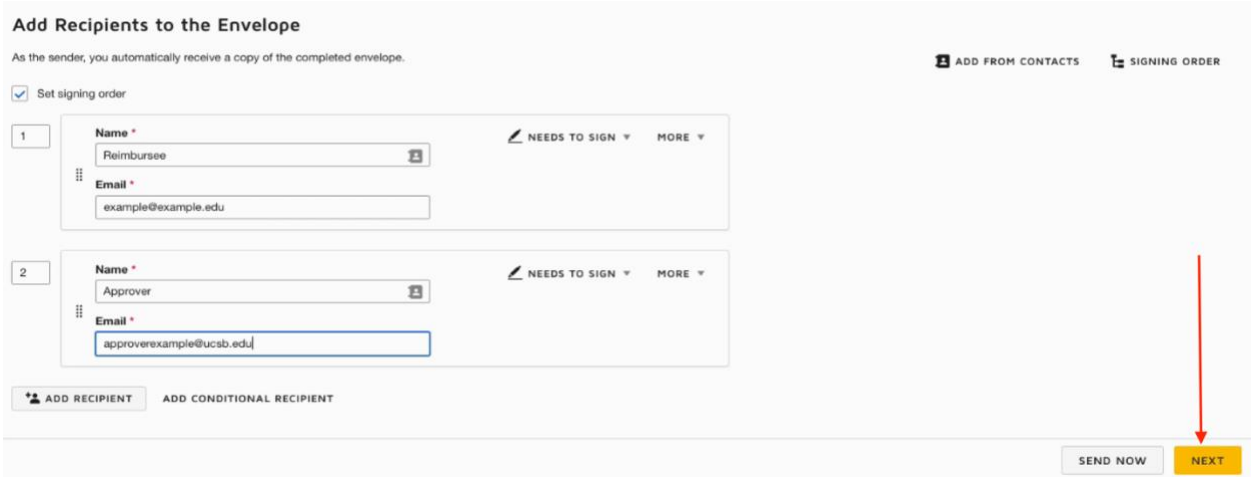


7. The reimbursee should be the first to sign.
    - Enter their Legal name. Whatever is entered in the “Name” section on docusign will show up on the final document
    - Enter the email the reimbursee provided on their worksheet
8. Once you have entered the reimbursee’s name and email, select “Add Recipient” to enter the Department Approver’s name and email.
    -Note: For reimbursements that require the Chair or the Dean’s signature you will need more than two assigned signatures. If you are not sure which signatures are needed or in what order they are

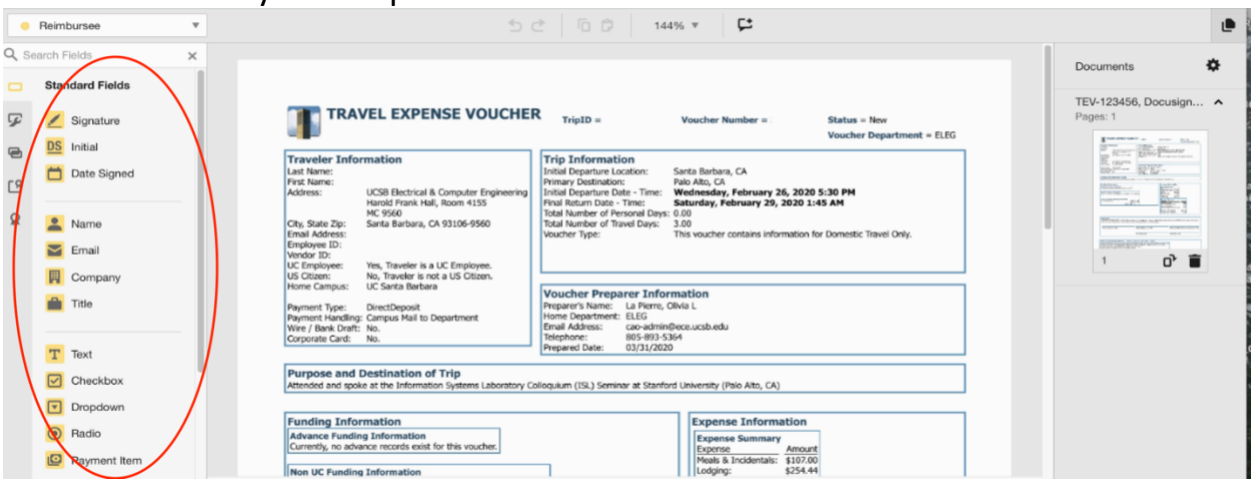
supposed to be, please contact the CAO



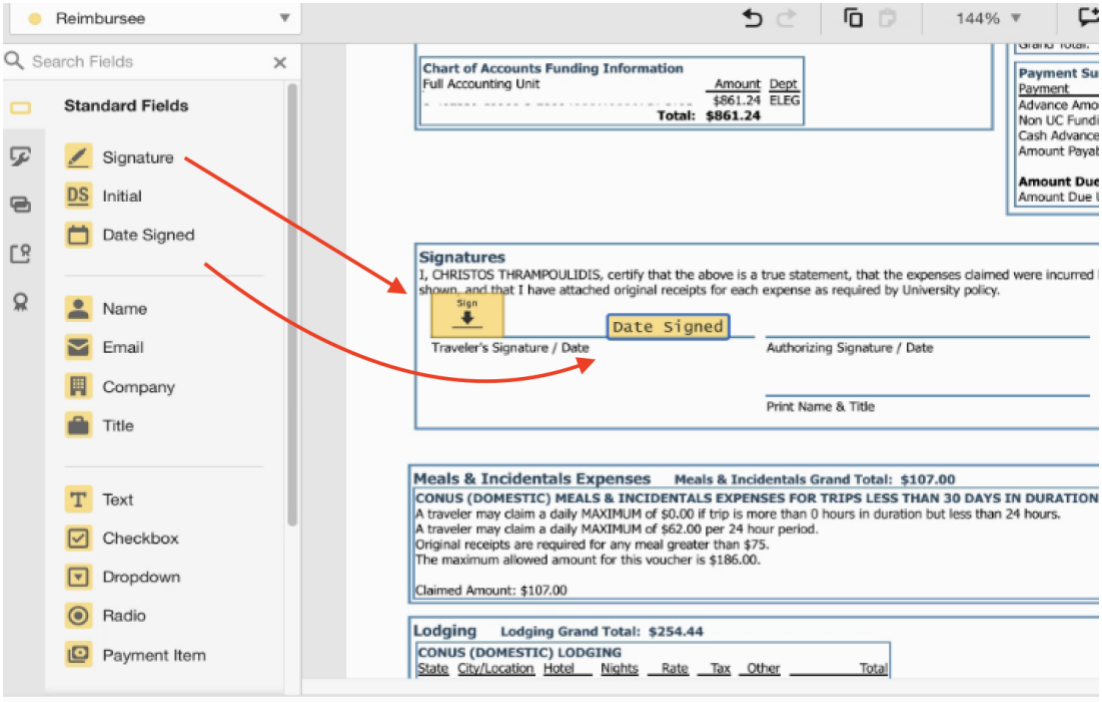
9. After entering the recipients click “next” in the bottom right hand corner of the page



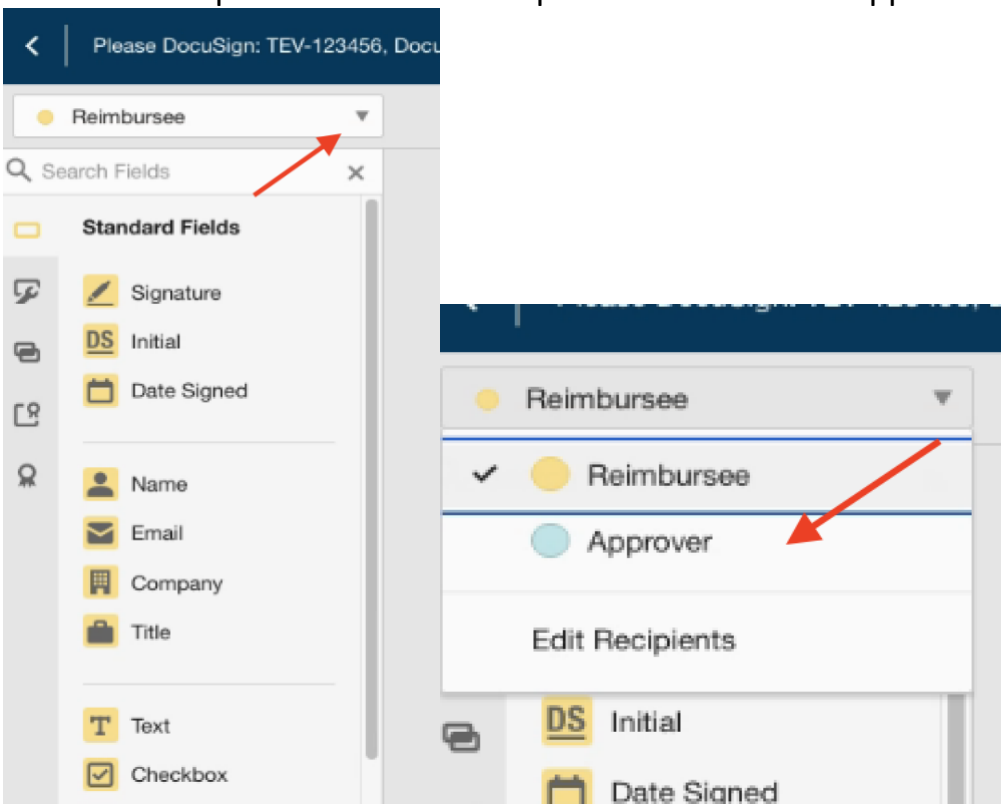
10. In the left panel you will see the docusign tools you can use to create fillable fields for your recipients



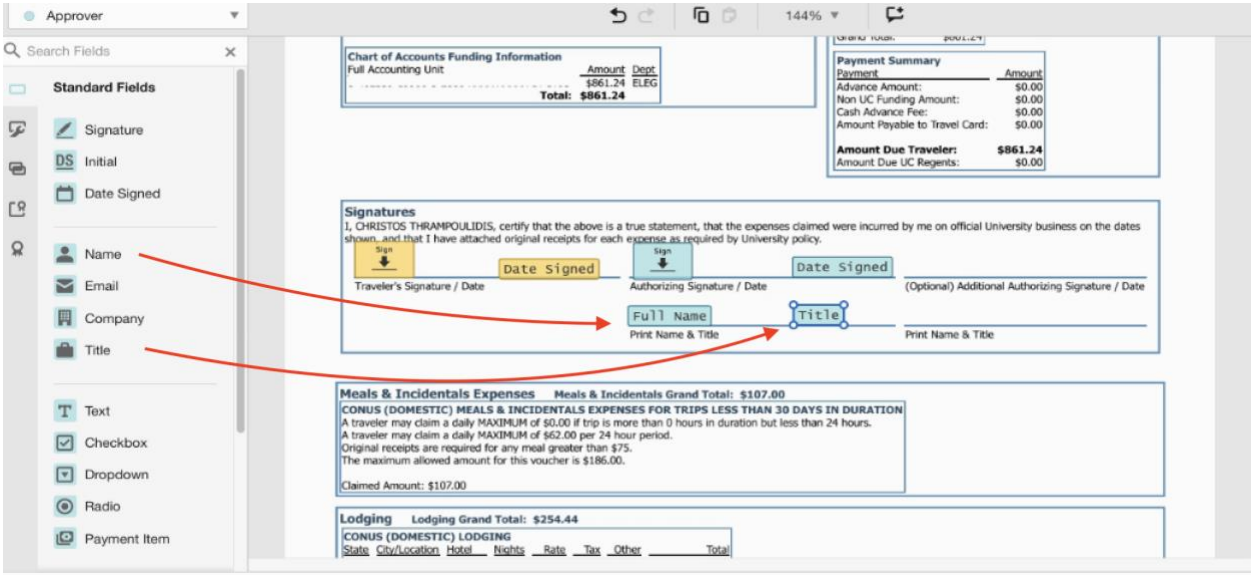
11. Select a tool and drag the field to the correct location on your document



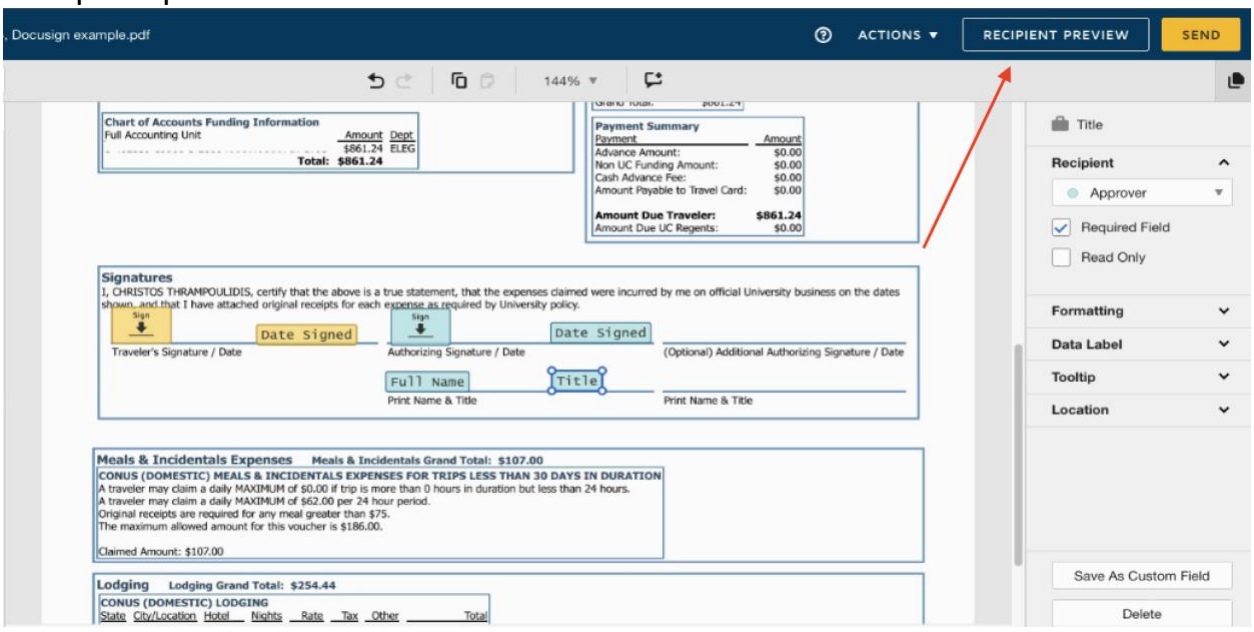
12. The fillable fields will be different colors for each recipient. This means when the recipient receives the document they will only be able to fill the field that is designated for them. To change the fields so that they belong to a another recipient click on the drop down menu in the upper left corner.



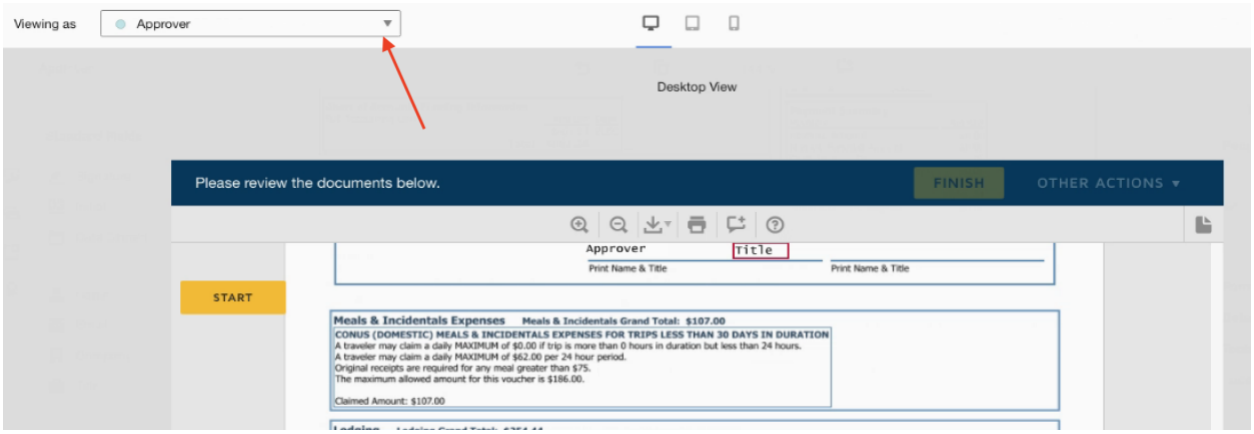
13. Drag and drop the required fields. Include Fields for the authorizing signer's full name and title (note: when completing a Supplies reimbursement Admin Assistants will input the Authorizing Signer's name and title in the disbursement voucher, so only their signature and date is needed if their name and title already appears on the document)



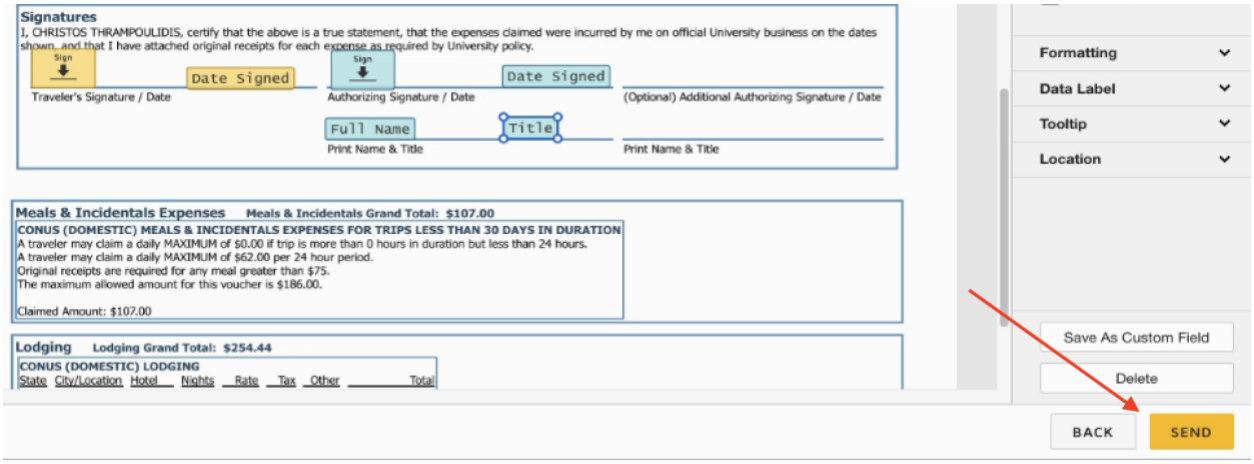
14. To review your document and view what your recipients will see click "recipient preview"



15. To change to a different recipient's view, select from the drop down menu in the upper left corner



16. Once you have reviewed your document and made sure all names and emails are correct click send



If you have any questions about this process contact cao-admin@ece.ucsb.edu