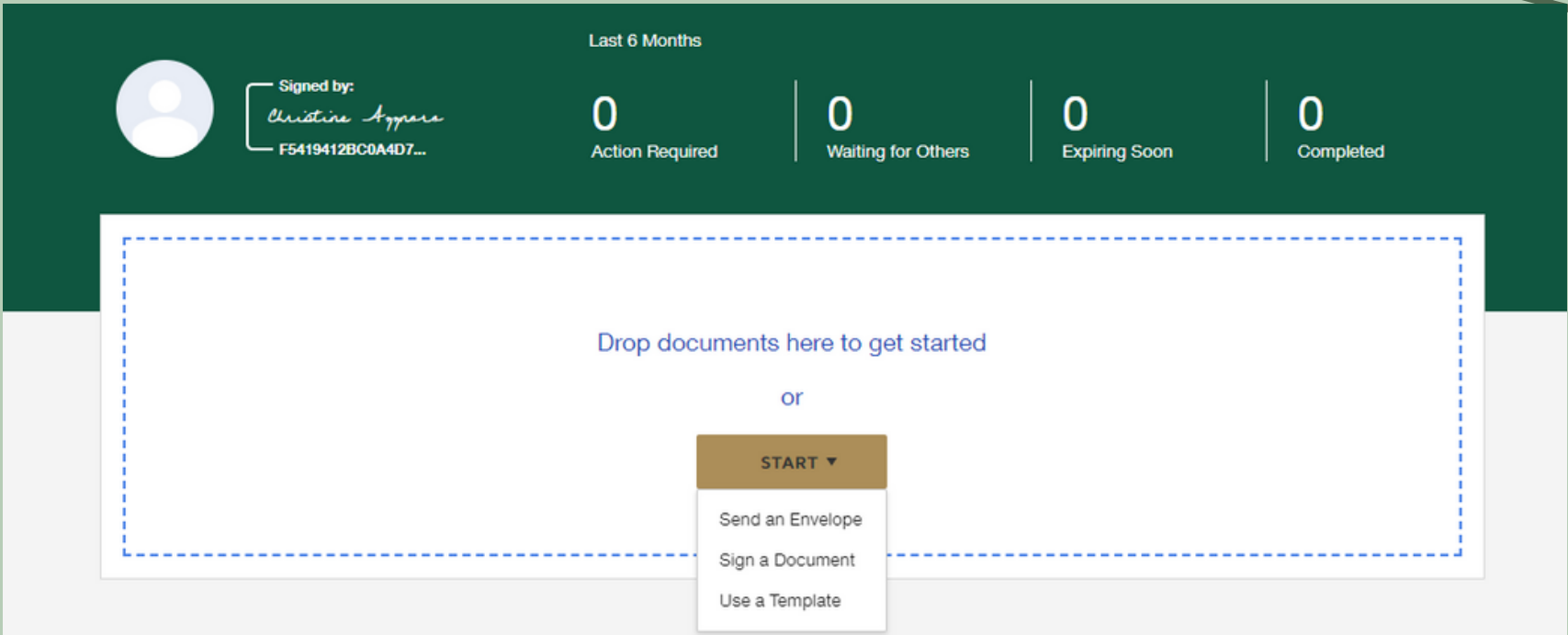
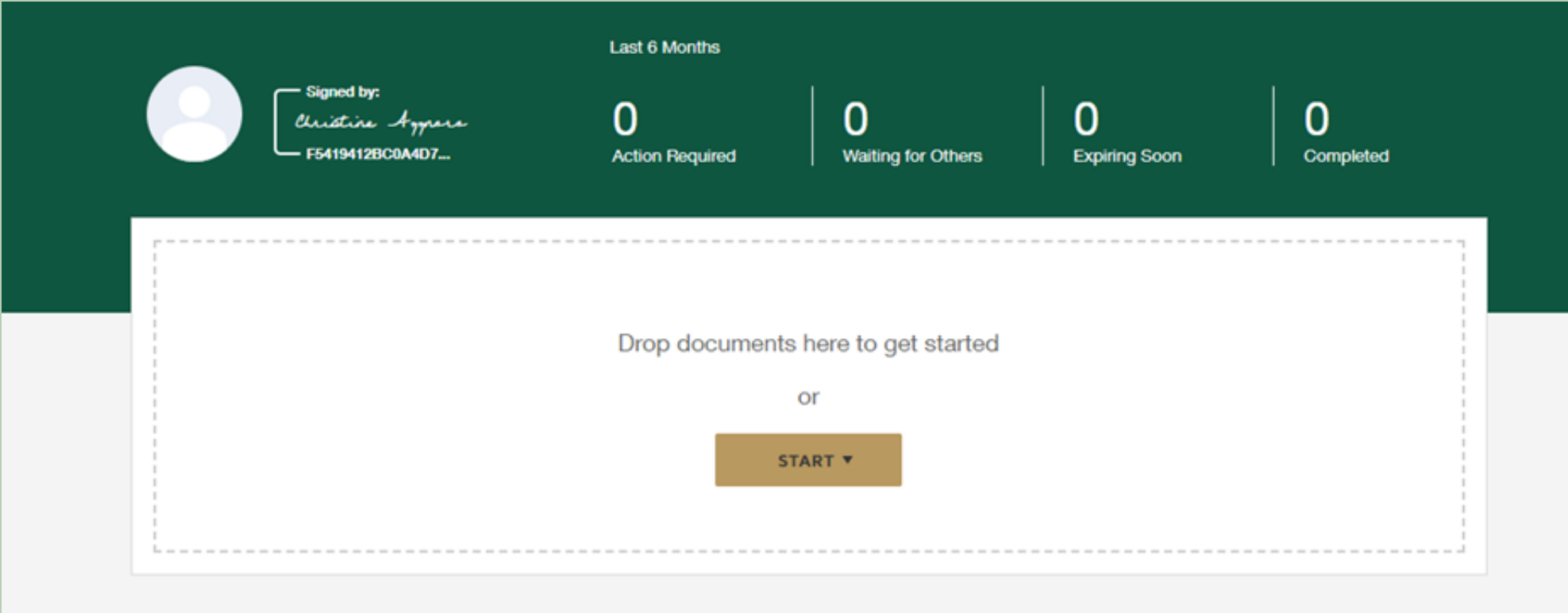




# Digital Signatures through DocuSign

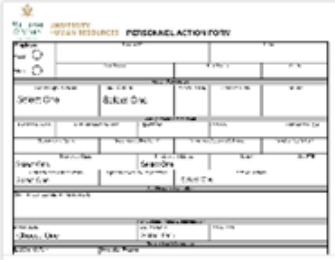
Log in to DocuSign, on the Home screen use this box to send an envelope



You will see your uploaded document and a section to add recipients

Complete with DocuSign: personnel-action-form.pdf ADVANCED OPTIONS

### Add documents



personnel-action-form.pdf  
1 page

Drop your files here or

**UPLOAD**

---

### Add recipients

Set signing order [View](#) [Bulk send](#) **NEW**

1

**Name \*** NEEDS TO SIGN CUSTOMIZE ✕

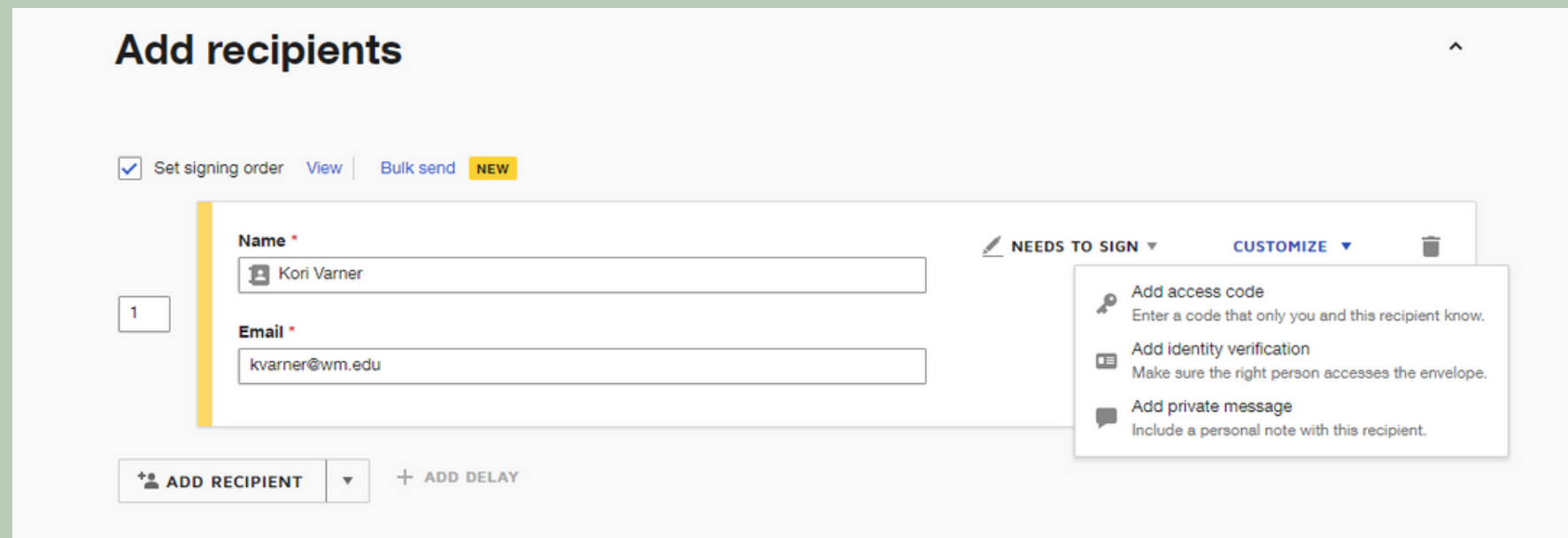
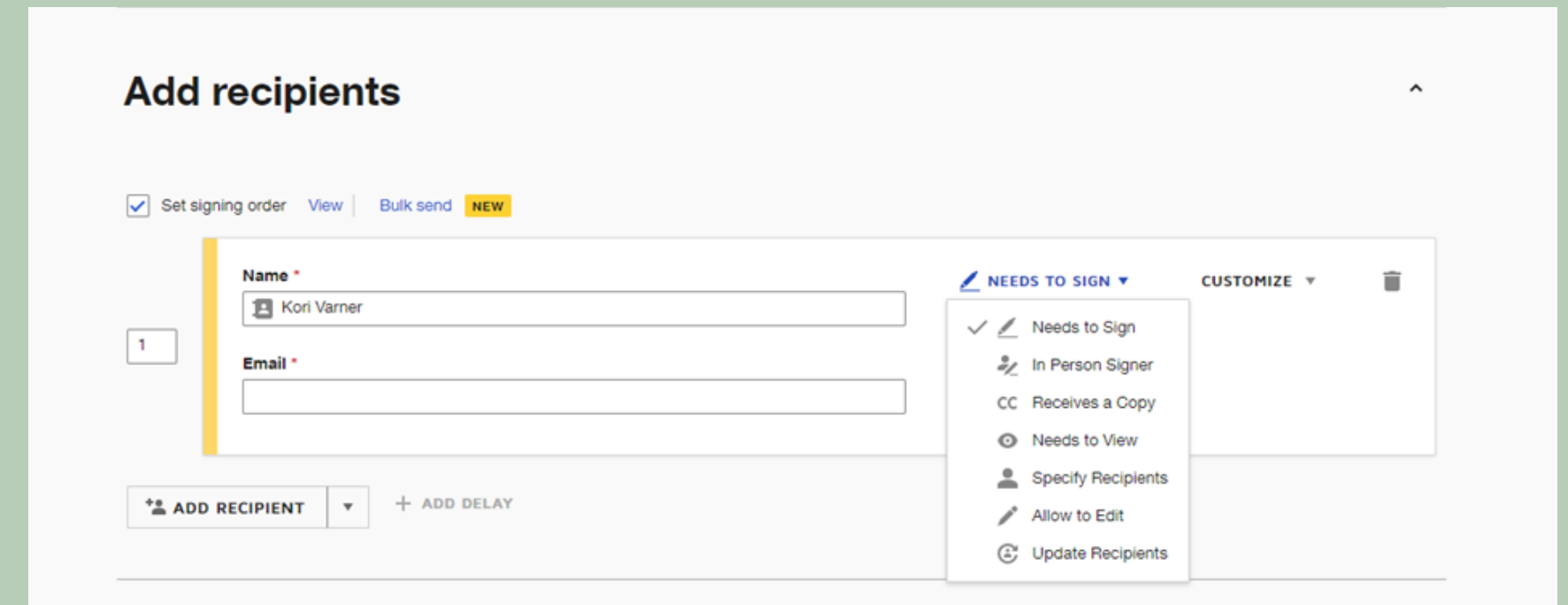
**Email \***

**SEND NOW** **NEXT**

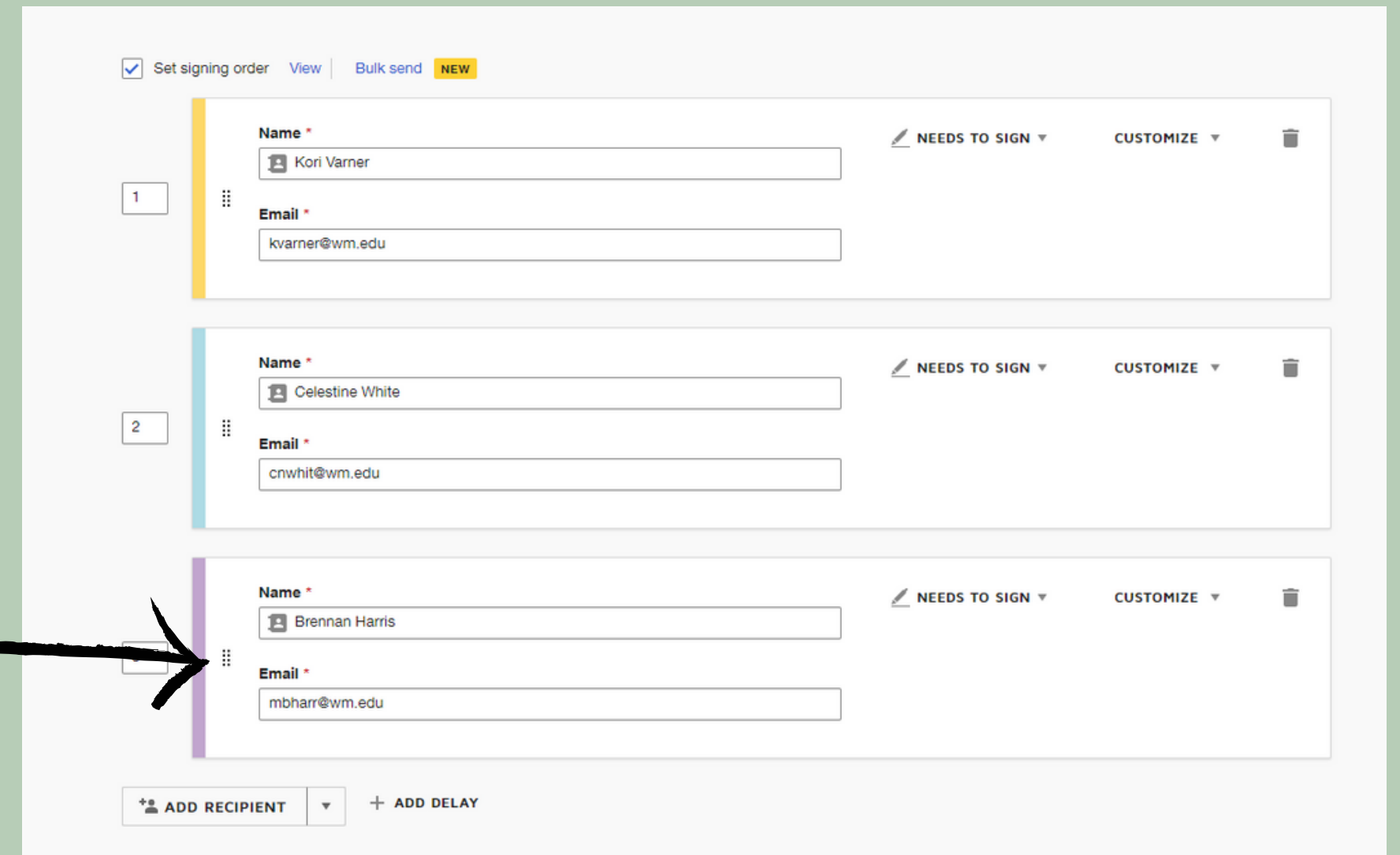
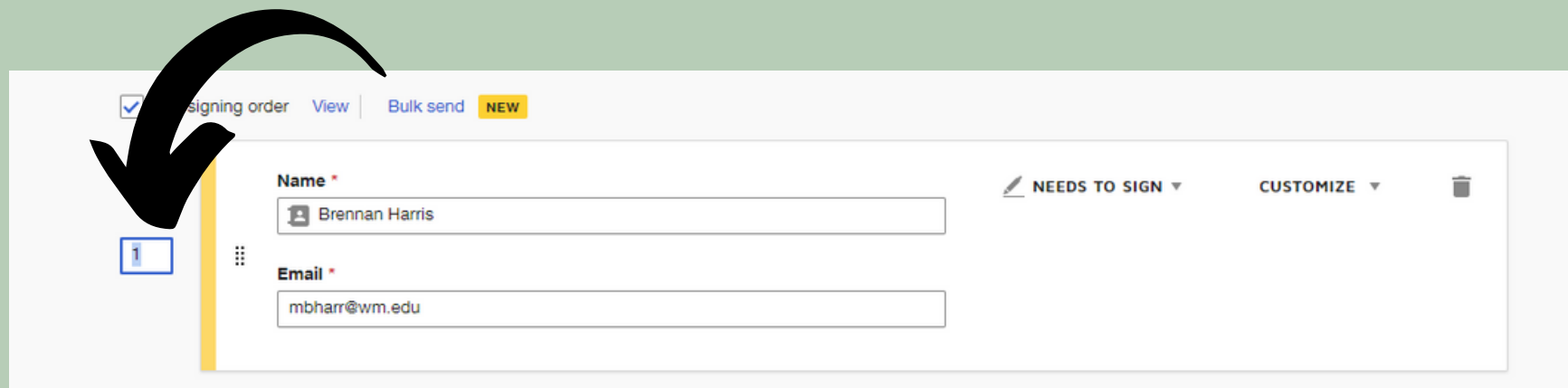
Put in the name and email of the signer. If you need multiple signatures, you can create a routing system by clicking “Add Recipient”. Each recipient will have a number to the left to indicate the routing order. Each recipient will be designate with different colors.

The screenshot shows the 'Add recipients' interface in DocuSign. At the top left, there is a tab labeled 'Complete with DocuSign: personnel-action-form.pdf'. In the top right corner, there is a button labeled 'ADVANCED OPTIONS'. The main heading is 'Add recipients'. Below the heading, there is a checkbox labeled 'Set signing order' which is checked, followed by links for 'View' and 'Bulk send' (with a 'NEW' tag). The main area contains a list of recipients. The first recipient is highlighted with a yellow background. To the left of the recipient box is a small box containing the number '1'. The recipient box has a 'Name' field with a person icon, an 'Email' field, and a status indicator 'NEEDS TO SIGN' with a dropdown arrow. To the right of the status indicator are 'CUSTOMIZE' and a trash icon. At the bottom left, there is a button labeled 'ADD RECIPIENT' with a plus sign and a dropdown arrow. To its right is a button labeled '+ ADD DELAY'.

You can change the setting of the signers to allow someone to receive a copy or make edits



You can add access codes or send private messages to the recipients.



You can adjust the routing order by clicking in the number box and typing in the correct number OR clicking on the 6 dots to the left of the name/email, hold the left mouse button and dragging the box to the appropriate position

## Add message ^

Custom email and language for each recipient

**Email Subject \***

Complete with DocuSign: personnel-action-form.pdf

Characters remaining: 51

**Email Message**

Enter Message

Characters remaining: 10000

---

**Frequency of reminders:** Every 0 days ▼ ⓘ

**SEND NOW** ▼ **NEXT**

You can change the email subject line and create a custom email if you choose.

Then click NEXT

Browser: appdemo.docusign.com/prepare/5e8f5eb1-c124-4698-a791-f55f1c3f10cd/add-fields?isNew=true

Document: Complete with DocuSign: personnel-action-form.pdf

User: Brennan Harris

Standard Fields:

- Signature
- Initial
- Date Signed
- Name
- Email
- Company
- Title
- Text
- Number **NEW**
- Checkbox
- Dropdown
- Radio
- Drawing
- Formula
- Attachment
- Note
- Approve
- Decline

Manage PDF form field data

What would you like to do?

- Assign to: -- Select Recipient --
- Keep PDF form data
- Delete data

PDF form data is preserved and read-only on the envelope; data cannot be edited.

[Learn More](#)

**CONFIRM**

Form Fields:

Employer	W&M <input type="radio"/>		Date	
	VIMS <input type="radio"/>		Middle	
Select Type of Action	Select One		Effective Date	End Date
Position Number	Role Title/Internal Title	Department	Location	Timesheet Org #
Supervisor's Name		Supervisor's Position #	Timesheet Approver's Name	Timesheet Appr's Pos #
Employee Class		Employment Status	Salary	Job FTE
Select One		Select One		
Part time or full time status		If part time # of hours per week	Term of Contract	
Select One		Select One		

Buttons: BACK, SEND

Footer: English (US) | Contact Us | Terms of Use | Privacy | Intellectual Property | Trust | Copyright © 2023 DocuSign, Inc. All rights reserved.

If this pops up, select Keep PDF from Data



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In the top left there is a dropdown box with all of the recipients and coded by the designated color according to the routing order

appdemo.docusign.com/prepare/456363f4-be97-4320-8faf-f73f385e39a8/add-fields?isNew=true

Complete with DocuSign: personnel-action-form.pdf

Christine Azznara

221%

Search Fields

- Standard Fields
  - Signature
  - Initial
  - Date Signed
  - Name
  - Email
  - Company
  - Title
  - Text
  - Number **NEW**
  - Checkbox
  - Dropdown
  - Radio
  - Drawing
  - Formula
  - Attachment
  - Note
  - Approve
  - Decline

Labor Distribution				
Index	Account	Activity	Percentage	Amount

Approvals		Funding Approvals based on Source of Funds	
1. Supervisor Sign	Date	5. Sponsored Programs	Date
2. Department Head	Date	6. Investment Administration	Date
3. Dean/Vice President	Date	7. Finance/Budget	Date
4. Provost/Chief Operating Officer/VP Research	Date		Date
Compensation	Banner:	I-9 Completed:	I-9 Verified date:

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Revised 10/26/22

personnel-action-form.pdf 1 of 1

Signature

Required Field

Rules

OPEN RULES

Formatting

Data Label

Tooltip

Location

Field Order

SAVE AS CUSTOM FIELD

DELETE

BACK SEND

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Click on yellow signature button and place it in the appropriate place on the form

appdemo.docuSign.com/prepare/5e8f5eb1-c124-4698-a791-f55f1c3f10cd/add-fields?isNew=true

Complete with DocuSign: personnel-action-form.pdf

Brennan Harris

221%

SHORTCUTS

Documents

personnel-action-form... ^

Pages: 1

1

Standard Fields

- Signature
- Initial
- Date Signed
- Name
- Email
- Company
- Title
- Text
- Number **NEW**
- Checkbox
- Dropdown
- Radio
- Drawing
- Formula
- Attachment
- Note
- Approve
- Decline

**Separation Information**

Last Day of Work      Separation Reason

**Labor Distribution**

Index	Account	Activity	Percentage	Amount

**Approvals**

1. Supervisor/PI	Sign ↓ Date Signed	Date	<b>Funding Approvals based on Source of Funds</b>	Date
2. Department Head		Date	5. Sponsored Programs	Date
3. Dean/Vice President		Date	6. Investment Administration	Date
4. Provost/Chief Operating Officer/VP Research		Date	7. Finance/Budget	Date
Compensation	Banner:	I-9 Completed:	I-9 Verified date:	

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BACK      SEND


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Click on yellow date signed button and place it in the appropriate place on the form, this will auto-populate the date for the day it is signed

Add Fields | Envelope | DocuSign x +  
 appdemo.docusign.com/prepare/5e8f5eb1-c124-4698-a791-f55f1c3f10cd/add-fields?isNew=true  
 Complete with DocuSign: personnel-action-form.pdf

Kori Varner | 221% | ACTIONS | PREVIEW | SHORTCUTS

Search Fields | Standard Fields: Signature, Initial, Date Signed, Name, Email, Company, Title, Text, Number (NEW), Checkbox, Dropdown, Radio, Drawing, Formula, Attachment, Note, Approve, Decline



### WILLIAM & MARY UNIVERSITY HUMAN RESOURCES PERSONNEL ACTION FORM

CHARTERED 1693

Employer	Banner ID	Date		
W&M <input type="radio"/>	Last Name	First Name	Middle	
VIMS <input type="radio"/>				
Action Requested				
Select Type of Action	Leave Options	Percent of Pay	Effective Date	End Date
Select One	Select One			
Assignment Information				
Position Number	Role Title/Internal Title	Department	Location	Timesheet Org #
Supervisor's Name	Supervisor's Position #	Timesheet Approver's Name	Timesheet Appr's Pos #	
Employee Class	Employment Status	Salary	Job FTE	
Select One	Select One			
Part time or full time status	If part time # of hours per week	Term of Contract		
Select One		Select One		

BACK | SEND

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Use the dropdown box to select the next signer, you will notice the color will change to indicate the next signature placement



DocuSign interface showing a form titled "personnel-action-form.pdf". The form is divided into several sections: "Separation Information", "Labor Distribution", "Approvals", and "Funding Approvals based on Source of Funds".

The "Approvals" section contains a table with the following structure:

Index	Account	Activity	Percentage	Amount
1. Supervisor/PI		Date		
2. Department Head		Date		
3. Dean/Vice President		Date		
4. Provost/Chief Operating Officer/VP Research		Date		

The "Funding Approvals based on Source of Funds" section contains a table with the following structure:

Index	Account	Activity	Percentage	Amount
5. Sponsored Programs		Date		
6. Investment Administration		Date		
7. Finance/Budget		Date		
		Date		

At the bottom of the form, there are fields for "Compensation", "Banner:", "I-9 Completed:", and "I-9 Verified date:". The footer includes contact information for Williamsburg, VA, and a revision date of 10/26/22.

The interface includes a "Standard Fields" sidebar on the left with options like Signature, Initial, Date Signed, Name, Email, Company, Title, Text, Number, Checkbox, Dropdown, Radio, Drawing, Formula, Attachment, Note, Approve, and Decline. A "Signature" panel on the right shows the recipient "Kori Varner" and options for Required Field, Rules, Formatting, Data Label, Tooltip, Location, and Field Order. Buttons for "SAVE AS CUSTOM FIELD", "DELETE", "BACK", and "SEND" are also visible.

Click on blue signature and date signed button and place them in the appropriate place on the form

appdemo.docuSign.com/prepare/5e8f5eb1-c124-4698-a791-f55f1c3f10cd/add-fields?isNew=true

Complete with DocuSign: personnel-action-form.pdf

Celestine White

221%

SHORTCUTS

Search Fields

Standard Fields

- Signature
- Initial
- Date Signed
- Name
- Email
- Company
- Title
- Text
- Number **NEW**
- Checkbox
- Dropdown
- Radio
- Drawing
- Formula
- Attachment
- Note
- Approve
- Decline


Labor Distribution				
Index	Account	Activity	Percentage	Amount
Approvals		Funding Approvals based on Source of Funds		
1. Supervisor/PI	Sign ↓	Date Date Signed	5. Sponsored Programs	Date
2. Department Head	Sign ↓	Date Date Signed	6. Investment Administration	Date
3. Dean/Vice President	Sign ↓	Date Date Signed	7. Finance/Budget	Date
4. Provost/Chief Operating Officer/VP Research		Date		Date
Compensation		Banner:	I-9 Completed:	I-9 Verified date:

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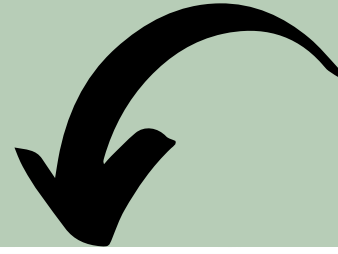
personnel-action-form.pdf 1 of 1

BACK SEND



Repeat for each recipient and then click SEND in the bottom right corner

In your DocuSign account, under the Manage tab you can keep track of your envelopes by looking in "Sent", "Waiting for Others", or "Completed"



Signature Home **Manage** Templates Reports

Developer Environment

SHARED ACCESS ▾

NEW ▾

ENVELOPES

- Inbox
- Sent**
- Drafts
- Deleted
- Bulk Send
- PowerForms

QUICK VIEWS

- Action Required
- Waiting for Others
- Expiring Soon
- Completed**
- Authentication Failed

FOLDERS +

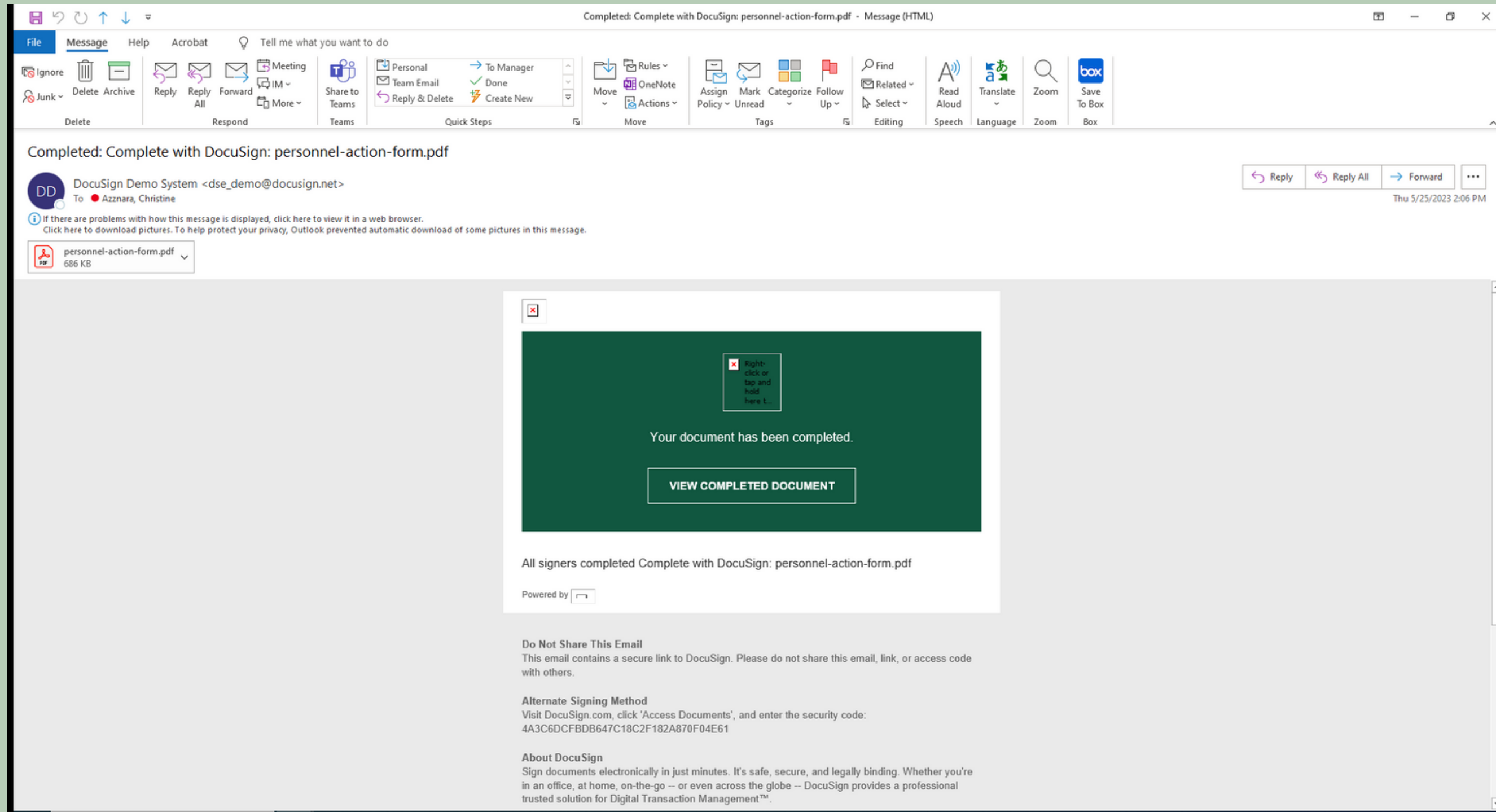
### Completed

Filtered by: Date (Last 6 Months) | [Edit](#)

Search Quick Views FILTERS

	Subject	Status	Last Change ▾	Folder	
<input type="checkbox"/>	<b>Complete with DocuSign: personnel-action-form.pdf</b> To: Christine Azznara, Christine Azznara	Completed	5/25/2023 02:05:46 pm	Sent <a href="#">+ 2 more folders</a>	DOWNLOAD ▾

Looking for more? | [Edit your filters](#)



Once the document has been signed by all recipients, you will receive an email with a final pdf of document with all of the signature and a link into your DocuSign account to view the final document