COLUMBIA UNIVERSITY
Human Resources

How to Create Custom Envelopes by Combining Existing Templates

The University is providing DocuSign to schools and departments to facilitate the sending and receiving of hire documents to new hires/rehires.

DocuSign provides a set of video guides to help you navigate the system. Please review the training resources available at: https://support.docusign.com/s/document-item?language=en_US&rsc_301=&bundleId=ulp1643236876813&topicId=ezn1578456259592.html&_LANG=enus

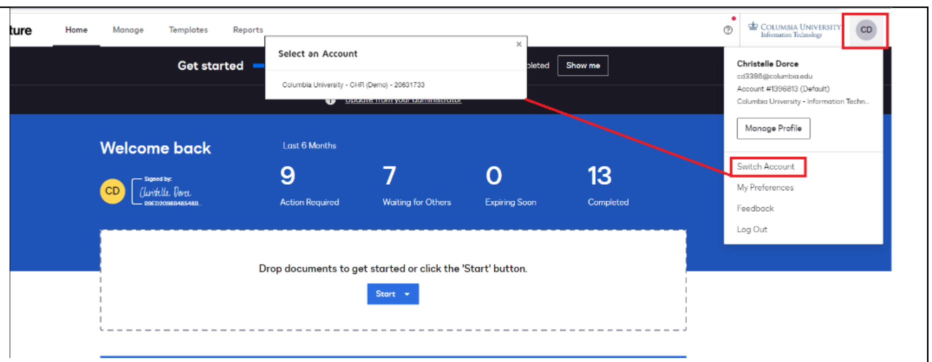
The steps below will help you get into the system and guide you on adding individual templates to the main hiring templates as well as editing previously sent envelopes to send to future hires. To access the Job Aid on using hiring templates go to: https://humanresources.columbia.edu/content/docusign-job-aids

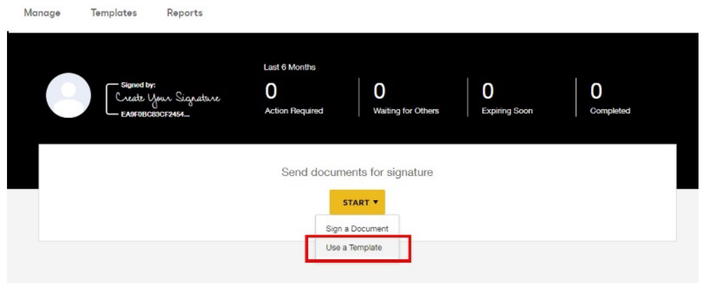
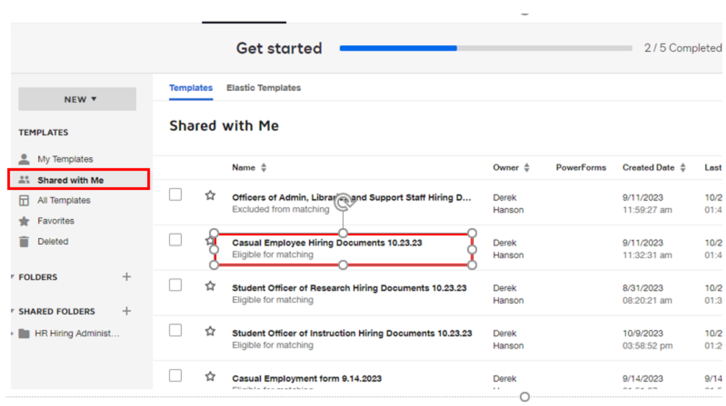
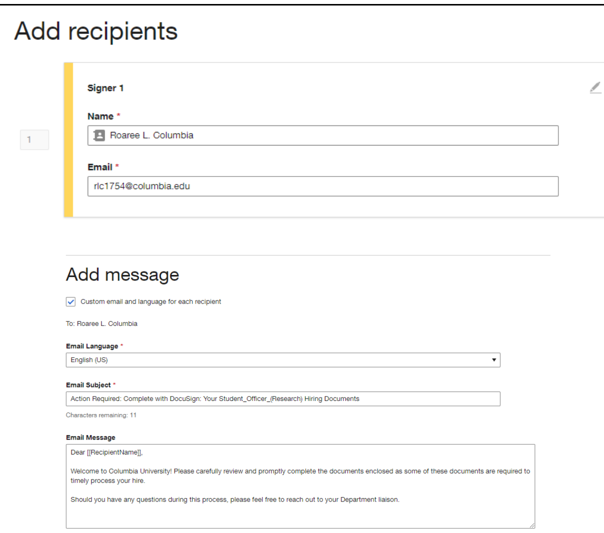
DocuSign: https://account.docusign.com/

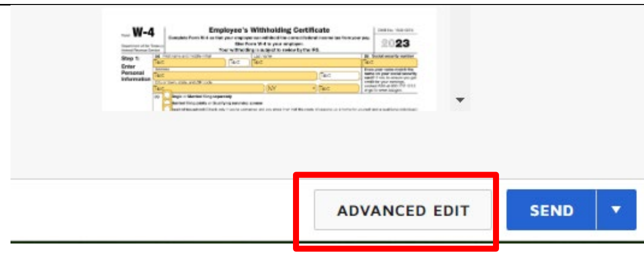
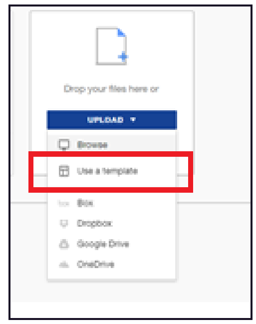
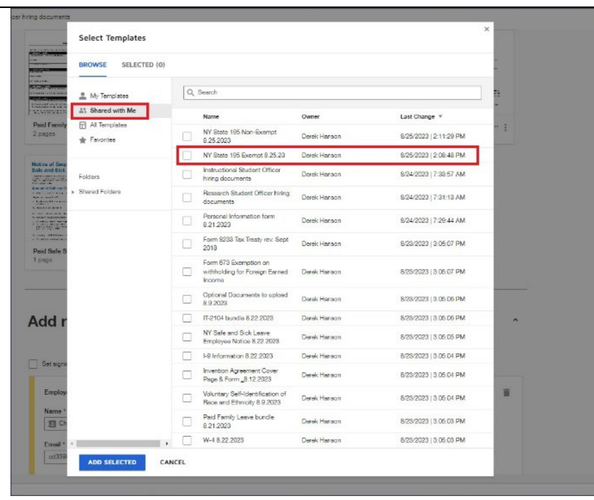
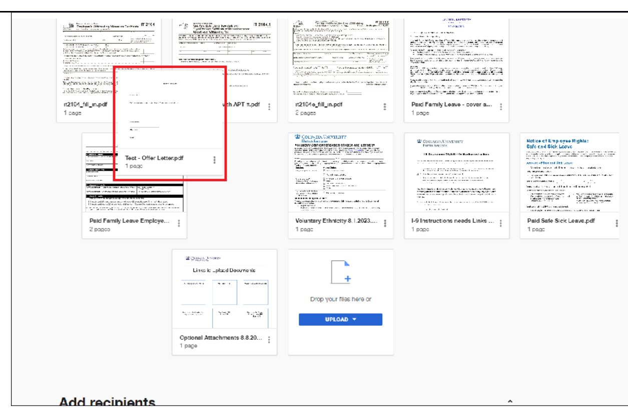
Key Terminology:

1. Hiring Template – groups of DocuSign formatted documents based on employee type.
2. Individual Template – single DocuSign formatted document.
3. Envelope – the final collection of templates and custom documents sent to a new hire to be completed.

Note that fields within the provided templates have been carefully customized. Please refrain from adjusting any field settings found in the right-side bar to avoid accidently granting the hire access to change information within the document, such as start date, rate of pay, etc.

1. Log in to DocuSign using your *uni.columbia.edu* email address; i. If you already have an account in DocuSign, you will need to switch to the CUHR account to access the hiring templates. Click on the person or initials icon located on the top-right corner of the screen to access the menu, then click on “Switch Account”. (If you are using a mobile device, the menu is located on the top-left corner of your screen).	

ii. If you do not already have an account, you will automatically be in the CUHR account.	
2. Once in the CUHR account, click on the down arrow next to start, and select "Use a Template".	
3. From the Template pop-up screen, click "Shared with Me" and then select the template you want to use. Each employee type hiring template is a group of documents appropriate for that particular type of hire. (Student Officers, Casual Employee etc.) *Note: Each hiring document is also available as an individual template.*	
4. Once you select a template, click "Add Selected" and a new screen opens that shows you the documents to be assigned, and allows you to enter the recipient's information i. Enter the recipient's name and email address ii. You can add a custom email message, or use the default one from the system.	

5. If you need to add one of the individual templates —for example, NY 195 template —click "Advanced Edit" in the lower right-hand corner of the screen. A new screen opens granting you access to add to the envelope. In the dropdown, click on "Use a template". *Note: you may also add your own custom documents to the envelope. Refer to the job aid "[DocuSign Using Hiring Templates]" for guidance.*	 
6. From the Template pop-up screen, click "Shared with Me" to navigate back to the complete list of available templates and select the individual template that you want to add.	
7. Once you have added the individual template to the hiring template, you may click and drag each page to position it in the order that you wish the hire to see it within the envelope.	

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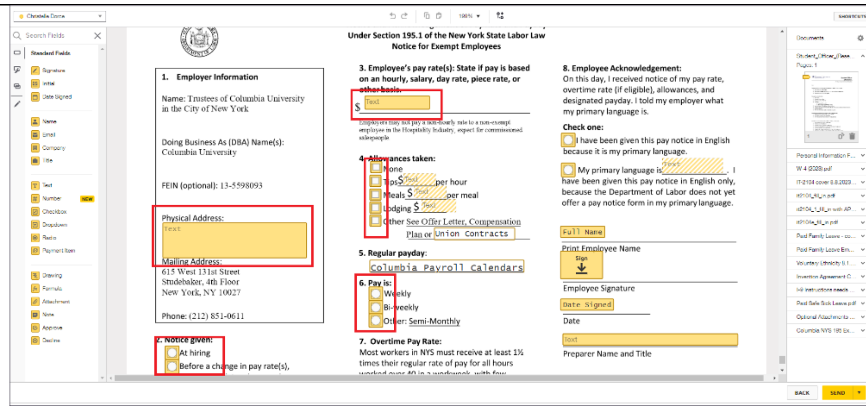
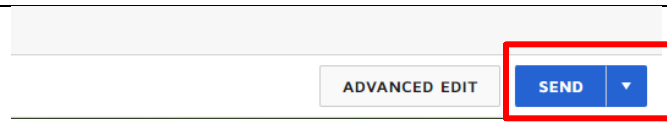
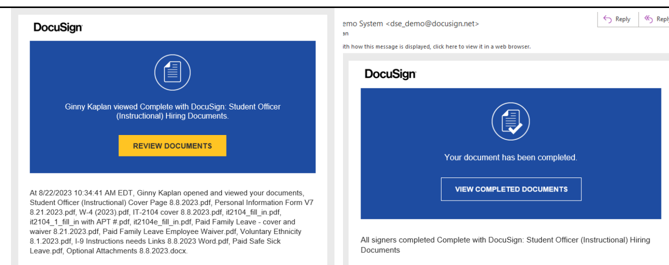
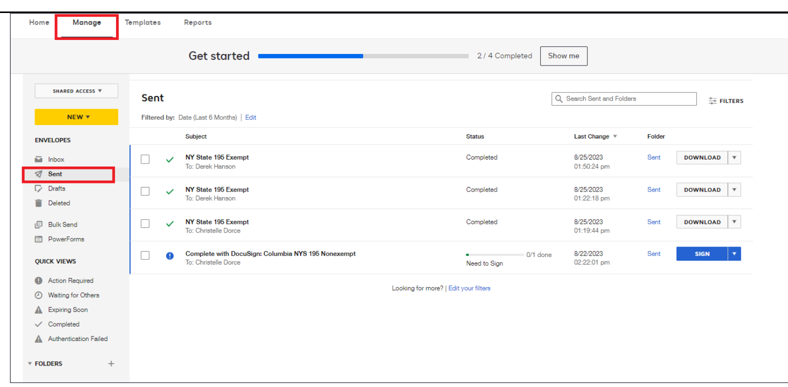
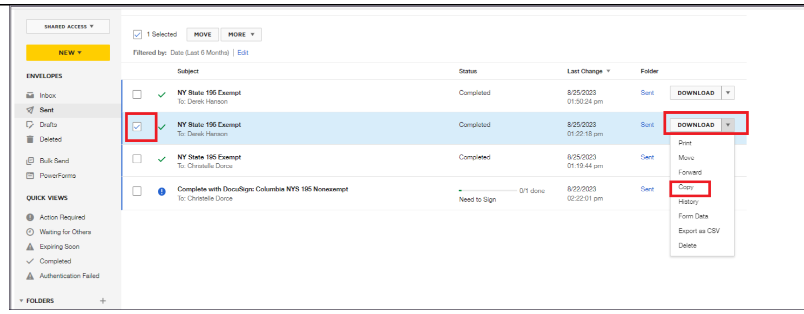
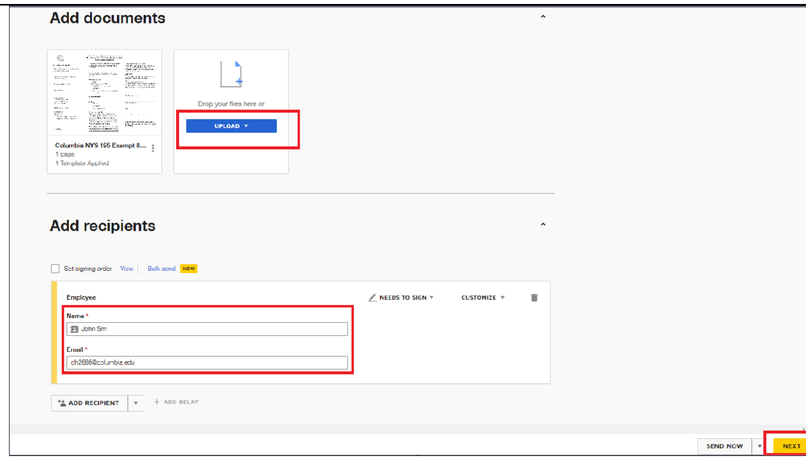
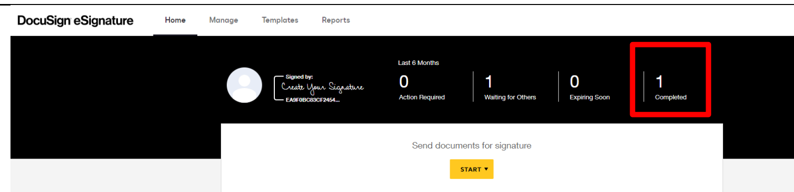
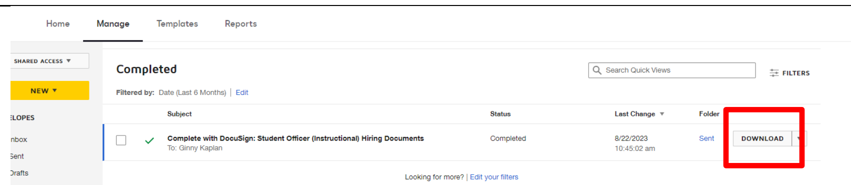
8. Click "Next" in the lower right-hand corner. This will allow you to navigate to the newly added individual template and complete any applicable fields prior to sending the envelope to the hire. For example, in the NY 195.1 template, you must input several key fields including Physical Address, Pay Rate, etc. **NOTE: Fields within the provided templates have been carefully customized to meet your needs. Please refrain from adjusting any existing field settings found in the right-side bar.**	
9. Once your envelope is complete, click "Send" in the lower right-hand corner.	
10. You will receive an email confirmation when the recipient opens the envelope. You will also receive a confirmation email when the documents have been signed and the envelope is marked complete.	
11. You may choose to reuse an envelope that has been sent to a previous hire, edit the envelope, and send it to a different hire. Click on the "Manage" tab located on the upper-left corner of your screen, then click "Sent" on the left side of the screen to access all envelopes that you've generated.	

12. Select the envelope that you want to reuse, click on the arrow next to the download button, then click on “Copy”.	
13. The envelope will open, allowing you to change the recipient’s name and email address, upload additional document, and/or use an existing individual template. Be sure to click “Next” in the lower right-hand corner of the screen to carefully review each document prior to sending the envelope.	
14. Once an envelope has been completed by the recipient and returned to you, it will show up in your home dashboard as completed. If an envelope is out for signature, you will see that in your “waiting for others” queue.	
15. Click on the “completed” number to open a new screen where you can see all completed envelopes. From here, click “Download” in the right-hand corner of the envelope that you wish to download.	

16. On the pop-up screen, select "Combine all PDFs into one file", then click "Download". This will prevent each completed document from downloading separately.