How to Add an Individual Document Template to Main Hiring DocuSign 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 an individual document templates to the main hiring templates as well as editing a previous envelope to send it a different hire.

**DocuSign:** [https://account.docusign.com/](https://account.docusign.com/)

*Note that fields within the individual document 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 has start date, rate of pay, etc.*

1. Log in to DocuSign using your uni.columbia.edu;
   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 one you want to use:
   i. **Student Officer of Research Hiring Documents**—set of documents needed to hire a student officer of research
   ii. **Student Officer of Instructional Hiring Documents**—set of documents needed to hire a student officer of instruction

   *Note: Each hiring document is also available as an individual document, so that you can select your own forms as needed.*

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 use one of the individual hiring document templates—for example, an offer letter—click “Advanced Edit” in the lower right-hand corner of the screen.

A new screen opens granting you access to upload a document. In the dropdown, click on “Use a template”.

Note that you may also add your own documents to the envelope even if you choose to use an existing individual document, if needed.

6. From the Template pop-up screen, click “Shared with Me” to navigate back to all the templates and select the individual hiring document that you want to add.

7. Once you have added the new document, you may click and drag to position it in the order that you wish the hire to see it within the envelope.
8. Click “Next” in the lower right-hand corner. This will allow you to navigate to the new document and complete any applicable field prior to sending the envelope to the hire. For example, in the 195.1 form, you must input several key fields including Physical Address, Pay Rate, etc.

NOTE: Fields within the individual document templates have been carefully customized. Please refrain from adjusting any 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 documents. You will also receive a confirmation email when the documents have been signed.

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 a document 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 documents 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.