COLUMBIA UNIVERSITY
Human Resources

# How to Use Individual Templates Configured for Document Replacement

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: DocuSign Training Video Library

The steps below will help you get into the system and get started with the CUHR-provided templates.

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

**Key Terminology:**

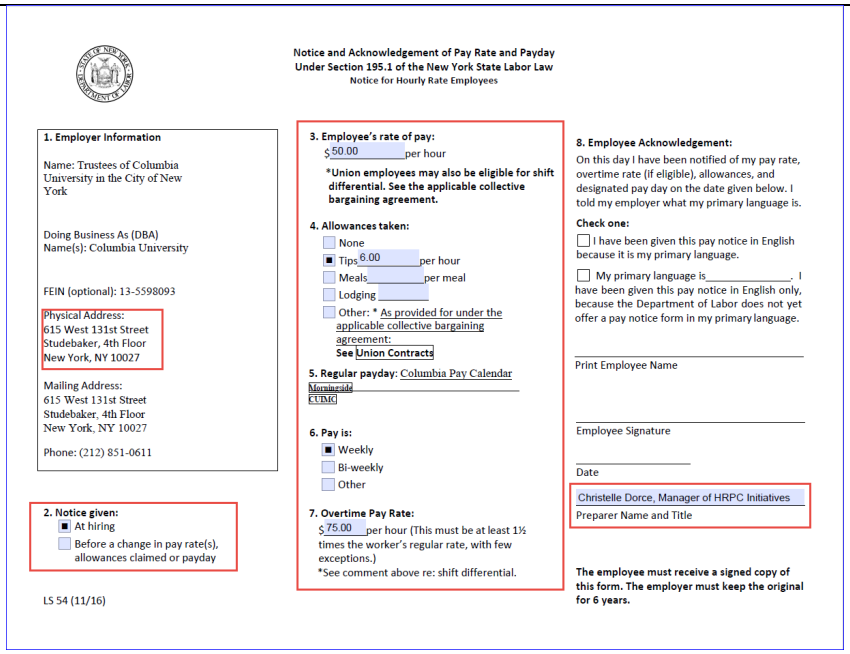
1. Hiring Template – groups of DocuSign formatted documents based on employee type.
2. Individual Template – single DocuSign formatted document.
3. Envelope – the final collection of templates and custom documents sent to a new hire to be completed.

**The most effective way to use the individual templates configured for document replacement is to replace the document in the template with a form in which the employer sections have already been completed.**

**For this job aid, form NY 195.1 for Non-Exempt employees is used as an example**

**1.** Prior to using DocuSign, you must prepare a NYS 195.1 form by completing the employer sections. Once all relevant sections are completed, save the form on your device.

**Note that the steps outlined below can be completed as a stand-alone process or as an addition to a Hiring Template.**



Notice and Acknowledgement of Pay Rate and Payday
Under Section 195.1 of the New York State Labor Law
Notice for Hourly Rate Employees

**1. Employer Information**

Name: Trustees of Columbia University in the City of New York

Doing Business As (DBA)
Name(s): Columbia University

FEIN (optional): 13-5598093

Physical Address:
615 West 131st Street
Studebaker, 4th Floor
New York, NY 10027

Mailing Address:
615 West 131st Street
Studebaker, 4th Floor
New York, NY 10027

Phone: (212) 851-0611

**2. Notice given:**
- [x] At hiring
- [ ] Before a change in pay rate(s), allowances claimed or payday

LS 54 (11/16)

**3. Employee's rate of pay:**
$ 50.00 per hour

*Union employees may also be eligible for shift differential. See the applicable collective bargaining agreement.

**4. Allowances taken:**
- [ ] None
- [x] Tips 6.00 per hour
- [ ] Meals ____ per meal
- [ ] Lodging ____
- [ ] Other: * As provided for under the applicable collective bargaining agreement:
  See Union Contracts

**5. Regular payday:** Columbia Pay Calendar
Morningside
CUIMC

**6. Pay is:**
- [x] Weekly
- [ ] Bi-weekly
- [ ] Other

**7. Overtime Pay Rate:**
$ 75.00 per hour (This must be at least 1½ times the worker's regular rate, with few exceptions.)
*See comment above re: shift differential.

**8. Employee Acknowledgement:**
On this day I have been notified of my pay rate, overtime rate (if eligible), allowances, and designated pay day on the date given below. I told my employer what my primary language is.

**Check one:**
- [ ] I have been given this pay notice in English because it is my primary language.
- [ ] My primary language is _____. I have been given this pay notice in English only, because the Department of Labor does not yet offer a pay notice form in my primary language.

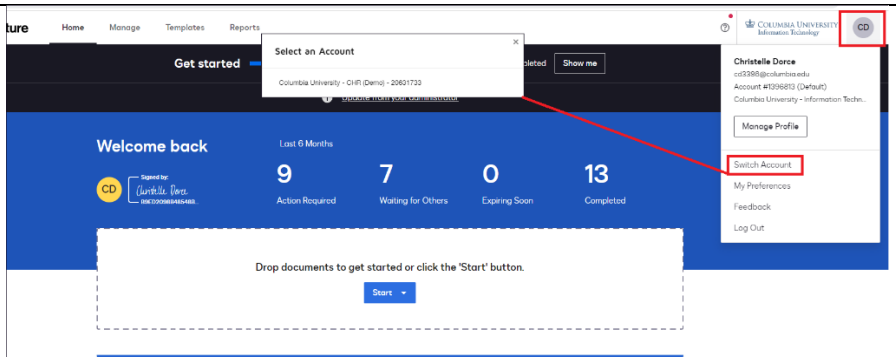
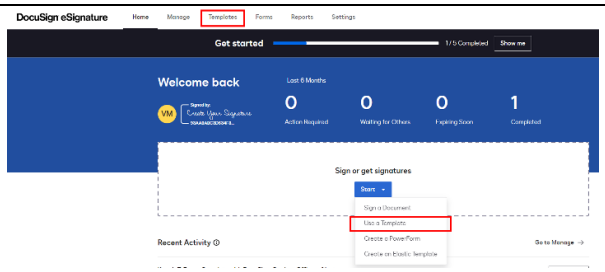
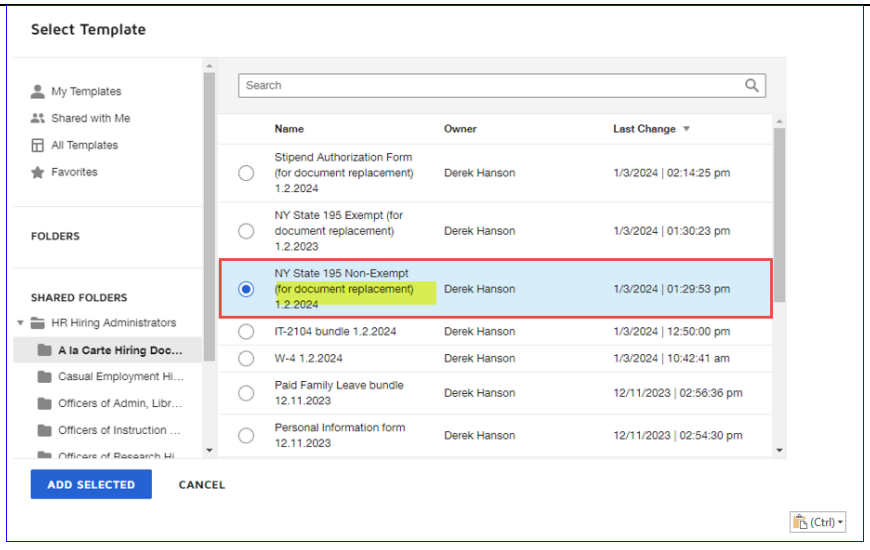
Print Employee Name

Employee Signature

Date

Christelle Dorce, Manager of HRPC Initiatives
Preparer Name and Title

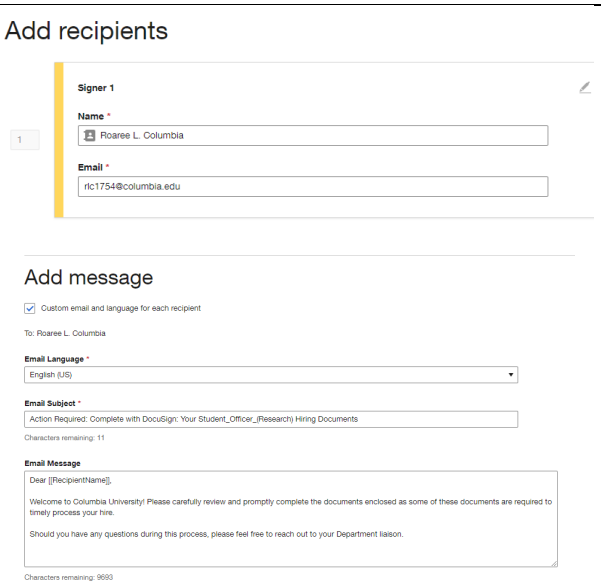
**The employee must receive a signed copy of this form. The employer must keep the original for 6 years.**

| | |
|---|---|
| **2.** Log in to DocuSign using your *uni@columbia.edu* email address;<br>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).<br>ii. If you do not already have an account, you will automatically be in the CUHR account. |  |
| **3.** Once in the CUHR account, click on the down arrow next to start, and select “Use a Template”.<br><br>You can also click on “Templates” from the top navigation |  |
| **4.** From the Template library screen, navigate to Shared Folders > HR Hiring Administrators > *A La Carte Hiring Documents* folder located on the left side of the screen. Then, select the individual template ending in "(for document replacement)" that you want to use and click "Add Selected" (or “USE” depending on how you navigated to the templates) |  |

**5.** A new screen opens allowing you to enter the recipient's information as well as a message.

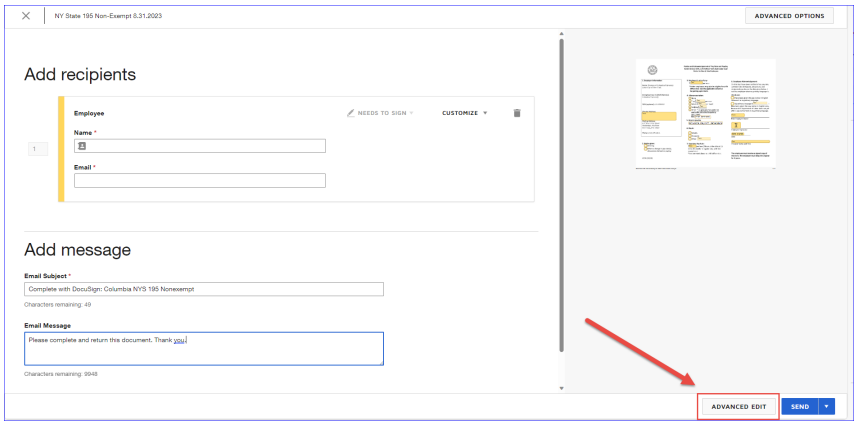
i. Enter the recipient's name and email address.

ii. You can add a custom email subject and message, or use the default one from the system.



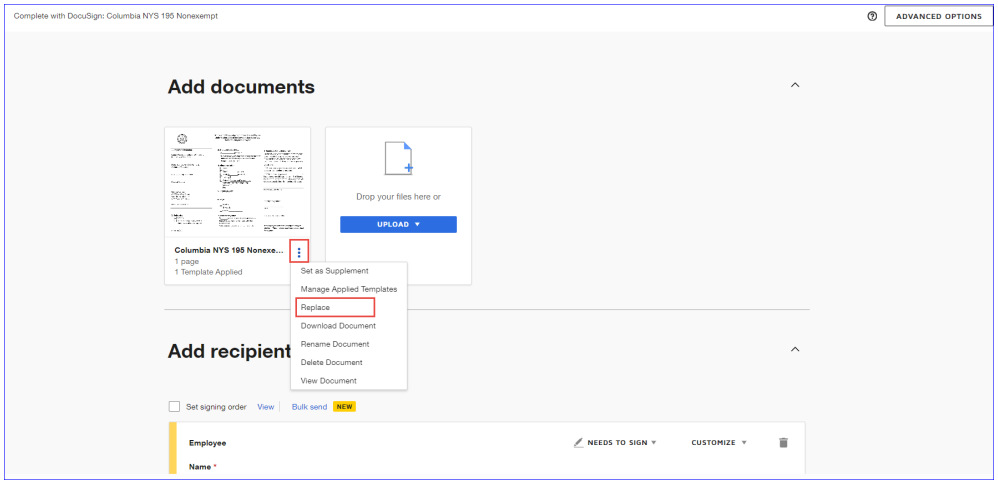

**6.** Click on "Advanced Edit" located in the lower right-hand corner of the screen.

A new screen opens with a small preview of the template under an "Add documents" section.

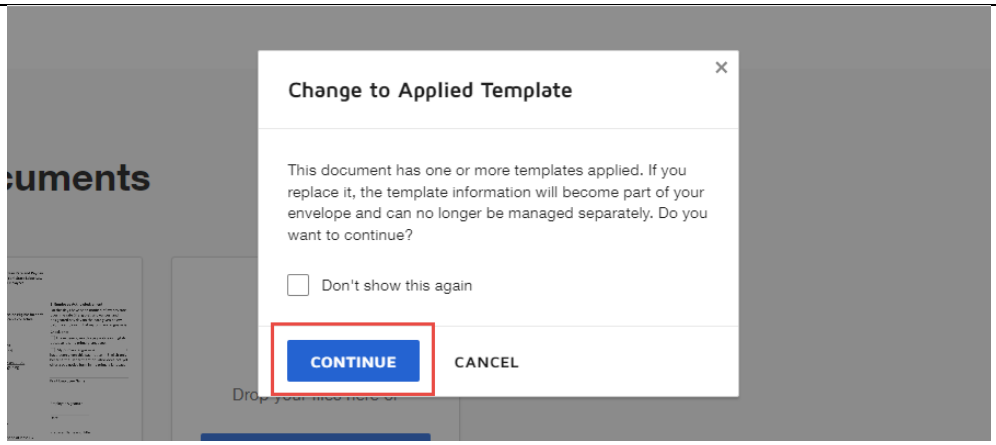



**7.** Click on the three-dots located at the lower-right corner of the document to access more options. Then, click on "Replace".

You will then be routed to your device to find the completed document that you had previously saved.

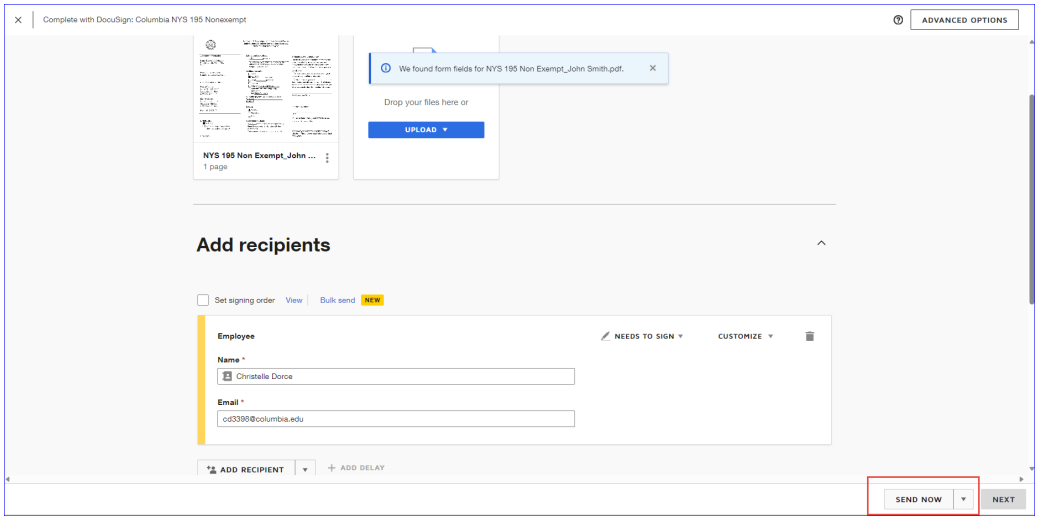


**8.** Navigate to and double click your document from your device's file explorer.
This screen appears requesting that you confirm wanting to replace the template. Click "Continue."



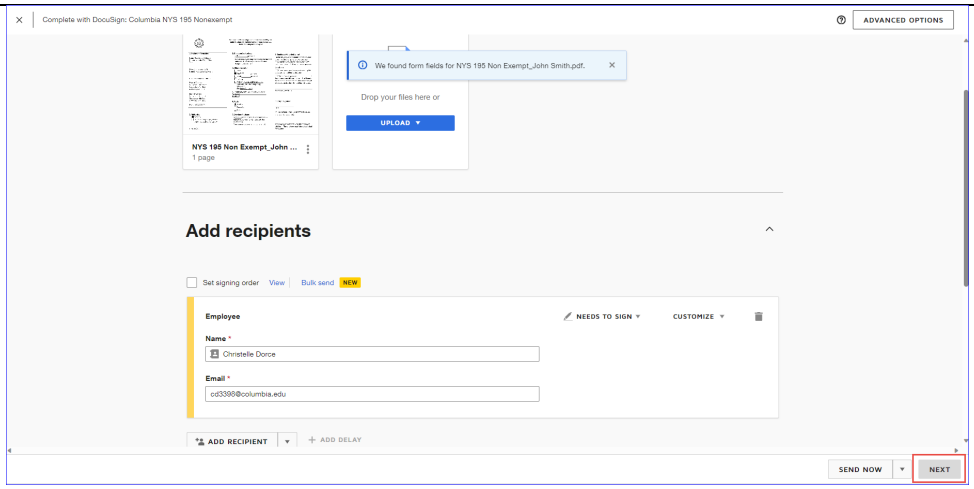

**9.** You may either send your envelope right away by clicking on "Send now" located at the lower right-hand corner of the screen or you may opt to further review and customize the envelope.

- *To add your own custom documents to the envelope, refer to the job aid "DocuSign Using Hiring Templates" job aid.*
- *To add one of the provided templates (individual or hiring templates), refer to the "DocuSign Customizing Envelopes Using Multiple Templates" job aid.*

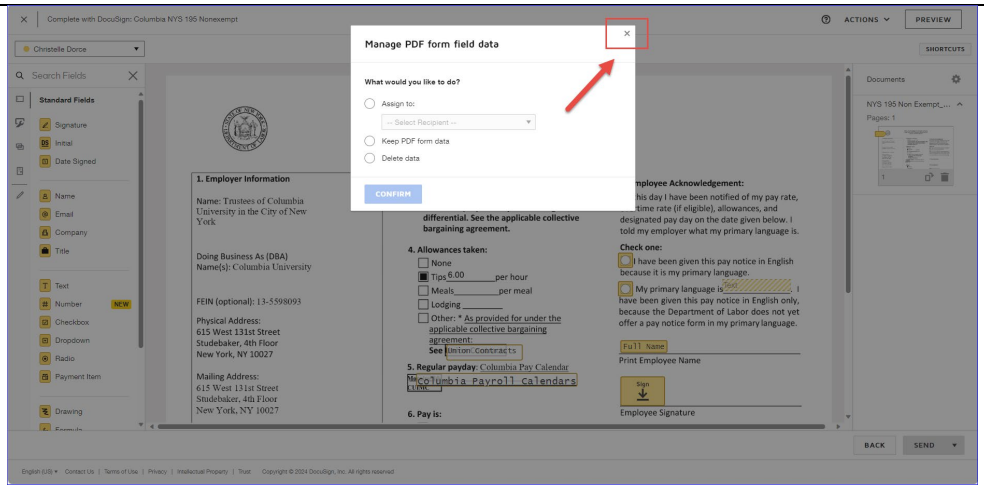


**10.** You may also preview the envelope prior to sending it to the hire by clicking on “Next” instead of “Send now”.

A new pop-up screen appears to grant you options to manage the field data within the PDF**. Do NOT make any selection.**

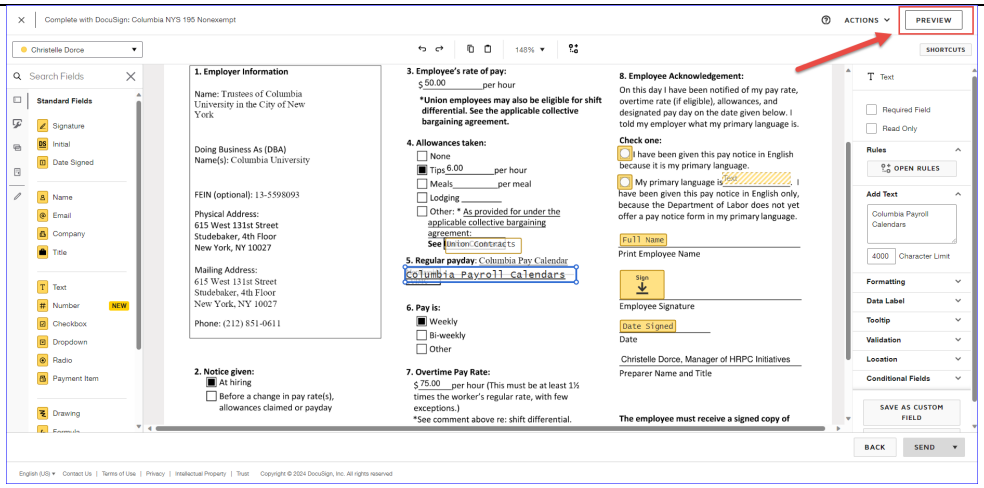



**11.** You must leave the selections on the pop-up screen blank and close out the screen to prevent unwanted alterations to the template.

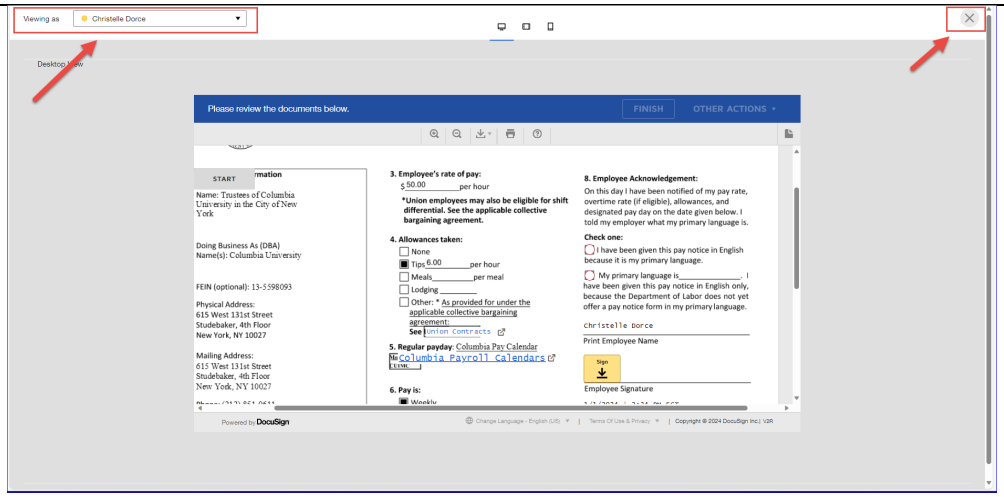



**12.** Click “Preview” located on the upper right-hand corner of the screen.

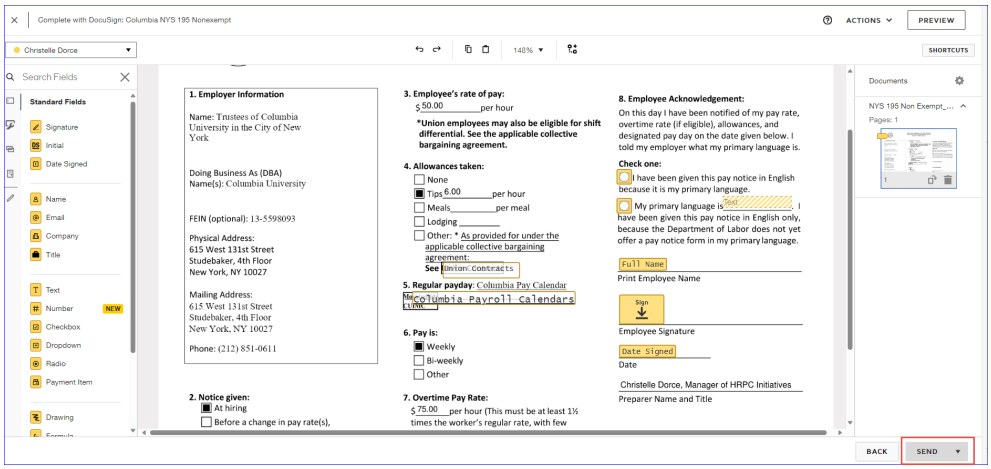
A new screen appears to show the exact view that the hire will have access to.

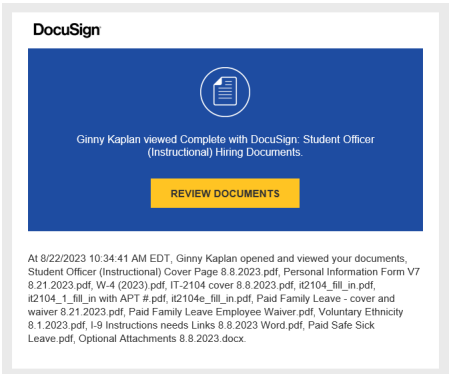
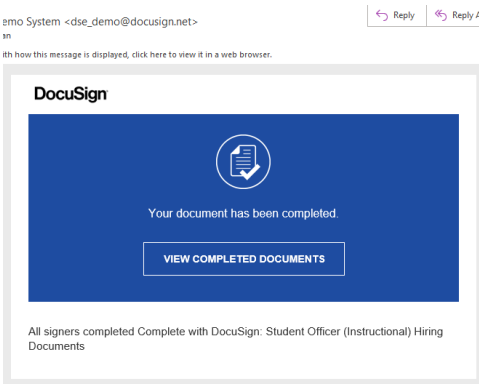


**13.** The upper left-hand corner of the screen populates the name of the hire that you input as the recipient and the employer sections of the template reflect the information from the document that you uploaded. You may close the screen using the "X" located on the upper right-hand corner.




**14.** Once you are satisfied with the drafted envelope, click "Send" in the lower right-hand corner.




**15.** 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.