

## How to Get Started with DocuSign and Use Hiring 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](https://support.docusign.com/s/document-item?language=en_US&rsc_301=&bundleId=ulp1643236876813&topicId=ezn1578456259592.html&LANG=enus)

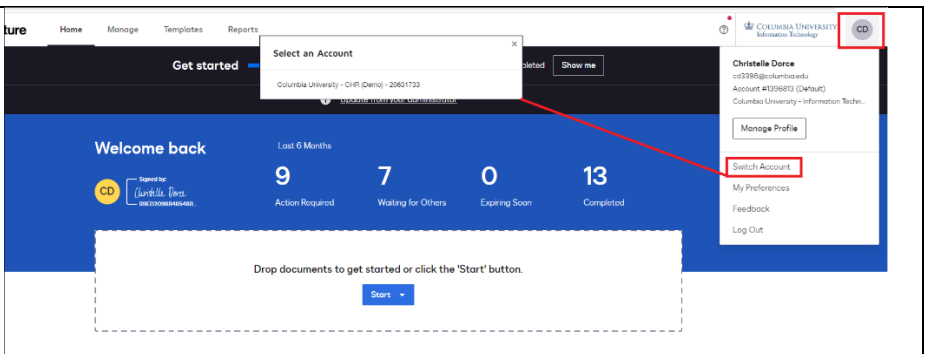
The steps below will help you get into the system and get started with the CUHR-provided templates.

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

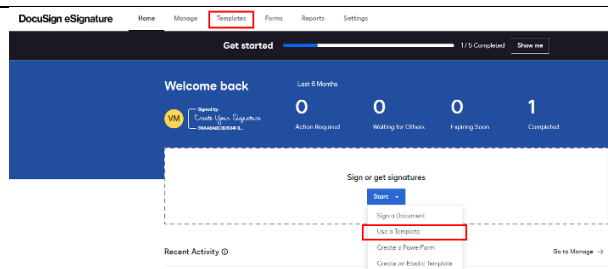
### Key Terminology:

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.

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.



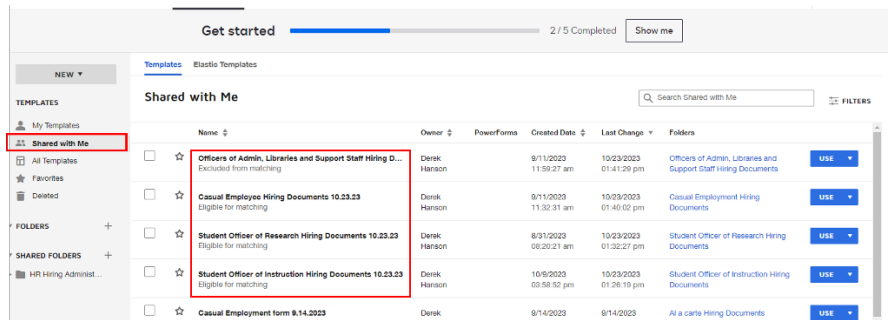
2. Once in the CUHR account, click on the down arrow next to start, and select “Use a Template”.  
You can also click on “Templates” from the top navigation



**3.** From the Template screen, click “Shared with Me” and then select the hiring template 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
- iii. **Officers of Admin, Libraries and Support Staff Hiring Documents**—set of documents needed to hire admin officers, support staff, and librarians
- iv. **Casual Employee Hiring Documents**— set of documents needed to hire casuals (either student or non-student)
- v. **Officer of Research Hiring Documents**— set of documents needed to hire an officer of research
- vi. **Officer of Instruction Hiring Documents**— set of documents needed to hire an officer of instruction

*Note: Each hiring document is also available as an individual template, so that you can create your own custom envelopes as needed.*



**4.** Once you select a hiring template, click “Add Selected” (or “use” depending on how you navigated to the templates) 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.

#### Add recipients

**Signer 1**

**Name \***  
Roaree L. Columbia

**Email \***  
rlc1754@columbia.edu

**Add message**

Custom email and language for each recipient

To: Roaree L. Columbia

**Email Language \***  
English (US)

**Email Subject \***  
Action Required: Complete with DocuSign: Your Student\_Officer\_(Research) Hiring Documents  
Characters remaining: 11

**Email Message**

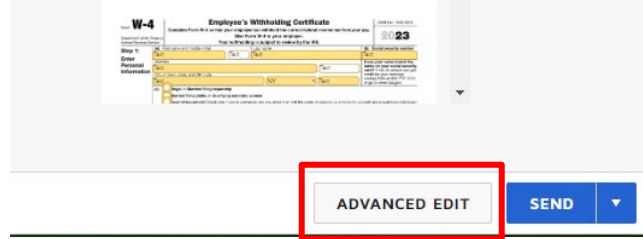
Dear [RecipientName]:

Welcome to Columbia University! Please carefully review and promptly complete the documents enclosed as some of these documents are required to timely process your hire.

Should you have any questions during this process, please feel free to reach out to your Department liaison.

Characters remaining: 9693

5. If you need to edit an envelope by adding additional recipients or add your own documents to an envelope—for example, an offer letter—click “Advanced Edit” in the lower right-hand corner of the screen.



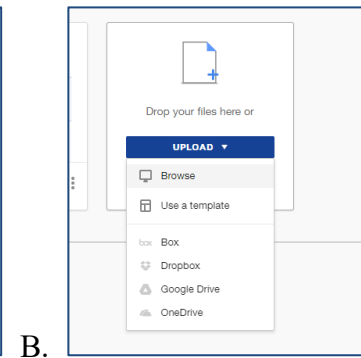
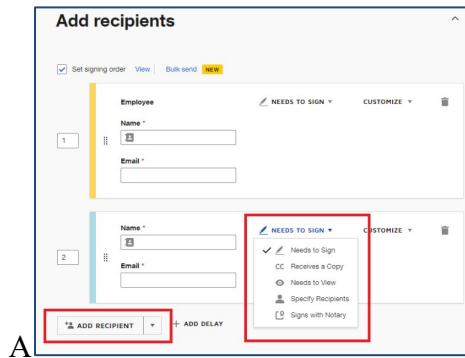
A new view opens where you can:

- A. Add/Edit recipients and assign each a function in the envelope workflow

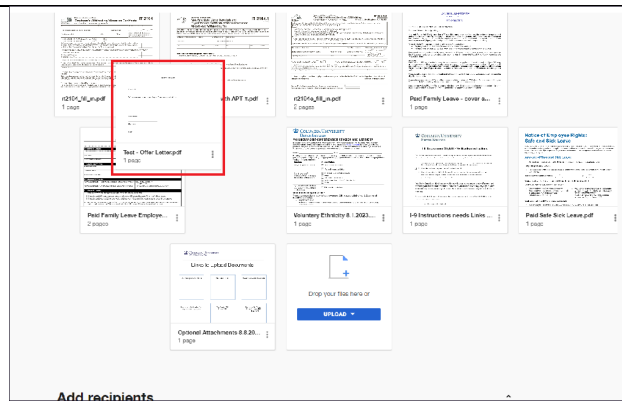
*Note: This step creates a workflow for the envelope and may not be used to generate the envelope to multiple hires.*

- B. Search for documents to upload from your computer

*Note: you may also add one of our provided individual templates, as needed. Refer to the [“DocuSign Customizing Envelopes Using Multiple Templates”](#) for guidance.*



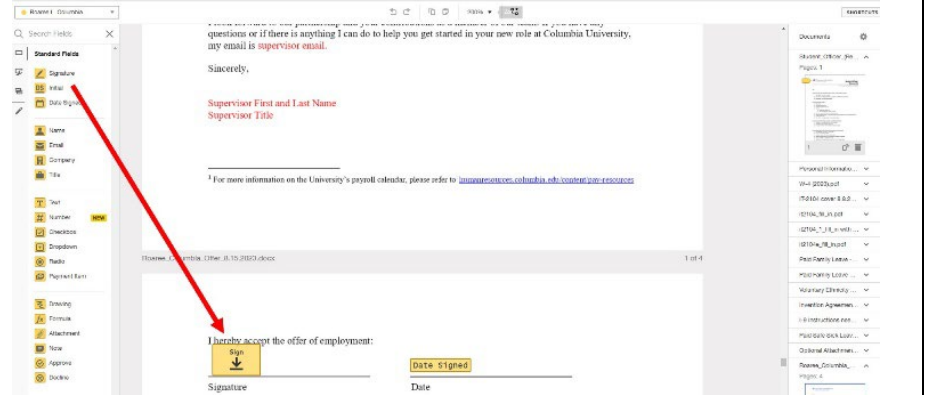
6. Once you have added a custom document, you may click and drag the document to position it in the order that you wish the hire to see it within the envelope.



7. Click “Next” in the lower right-hand corner. This will allow you to navigate to the new document that you have uploaded and add standard fields such as text, signature, date, etc.

Standard fields options are located on the left side of the screen. To use them, click and drag them to the appropriate location on your document.

- **Signature** -> To prompt the hire to sign
- **Initial** -> To prompt the hire to initial
- **Date Signed** -> To automatically capture the date and time the hire signs.
- **Text** -> To prompt the hire to type in information.

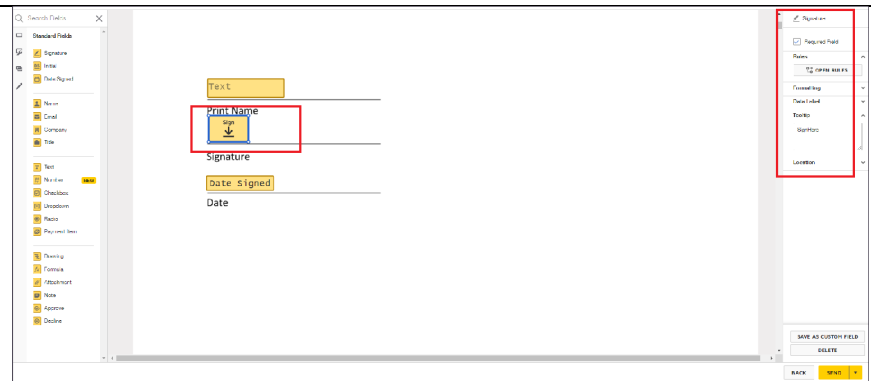


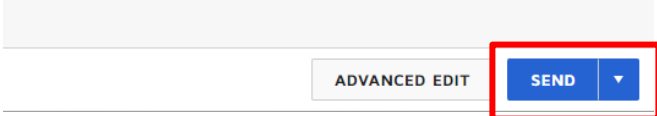
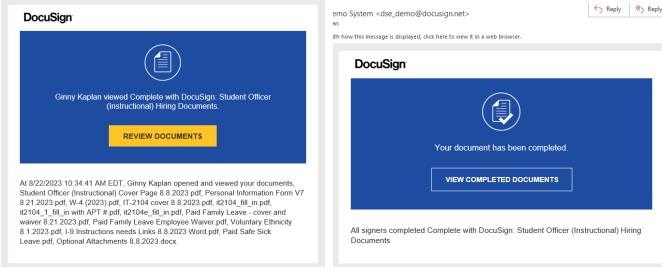
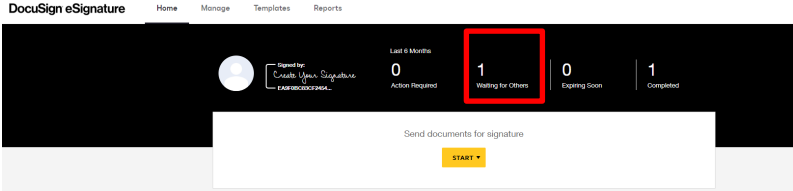
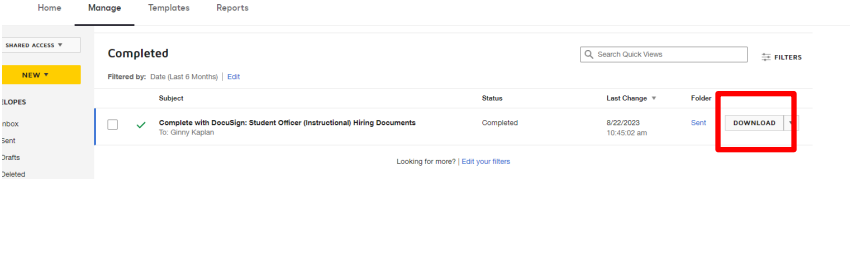
8. Once new fields are added to your document, click on each field to customize them as needed.

Tools to customize fields are located on the right side of the screen. They vary based on the field selected. To use these tools, you must first click on the field that you wish to customize.

- **Required Field** -> Select if the hire must complete
- **Tooltip** -> Type in short clarification about the field.

**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.**



<p><b>9.</b> Once your envelope is complete, click “Send” in the lower right-hand corner.</p>	
<p><b>10.</b> 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.</p>	
<p><b>11.</b> Once an envelope has been completed by the recipient and returned to you, it will show up in your home dashboard as completed.</p> <p>If an envelope is out for signature, you will see that in your “waiting for others” queue.</p>	
<p><b>12.</b> 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.</p>	
<p><b>13.</b> On the pop-up screen, select “Combine all PDFs into one file”, then click “Download”.</p> <p>This will prevent each completed document from downloading separately.</p>	