

Office of Business Acquisition Services' (OBAS) eSignature Process Customer Information User Guide

Abstract

The purpose of this document is to help answer questions that Users might have about OBAS' eSignature process

Document Owner: The OBAS Team OBASHelpline@dgs.ca.gov

Contents

1.	Ove	erview:	2
2.	Sco	ope:	2
3.	Rec	quirements:	2
4.	Ste	ps to eSign:	3
4	.1.	Standard procedure	4
4	.2.	When you access a DocuSign envelope, but are not ready to eSign	5
4	.3.	When you access a DocuSign envelope and cannot sign the contract, as written	6
5.	Ado	ditional Authentication	6
6.	Voi	ded envelopes	6
7.	Q&	A:	7
7	.1.	How do I know the document being eSigned has been signed by all parties?	7
7	.2.	When can the I commence work?	9
7	.3.	How do I save and/or print an eSigned document for my own records?	9

1. Overview:

In August 2018, the Office of Business Acquisition Services (*OBAS*), under the Department of General Services (DGS), started using DocuSign to secure electronic Signatures on the STD 213 contracts it issues. Over time, the goal is to expand DGS' use of eSignatures. Before this happens, you will be notified of DGS' intention to include new document(s) in its eSignature process.

2. Scope:

All STD 213 contracts that are *under OBAS' delegated authority*, for which the Contractor has agreed to eSign.

3. Requirements:

- Contractor's agreement to eSign, which will be requested in OBAS' standard Award Notification Email:



• When the email will be sent in the overall contracting process:

Example of the Award Notification Email: 0

Yellow = Key points in existing Award Notification Email. Green = New key points for electronic signature Congratulations! It appears Company XYZ is the apparent lowest responsive Bidder for the ABC contract opportunity. In order to "award" the contract, we need the attached documents completed and returned within 5 days of this email. Please forward these via email to my attention. The insurance documents may require additional time for completion, so please don't hold off forwarding all other requested documents. Once the completed documents are received from your company and the information is analyzed and accepted, the contract can be officially awarded and I will send you the contract package for signature. Please complete and return the following documents to me via email: STD 204 Payee Data Record (attached) Bidder Declaration(attached) Commercially Useful Function Certification (attached) Certificate of Insurance and Endorsements: Please also send an insurance certificate and its endorsements as this is a requirement in Exhibit D, Section 8 of the prospective contract (attached). In addition to the attached documents, can you please provide this additional information: Name, title, and address of the person who will sign the contract for your business Confirm your legal business name Name, title, address, phone number and email address of the Contractor's Contract Administrator as specified in Exhibit A, Section 2.A of the prospective contract (attached). DGS offers the option to sign this contract electronically (e-sign) via DocuSign. If you consent to e-sign, please provide the email address for the above named signatory. The signatory will receive an email from DocuSign with instructions to e-sign the contract. DocuSign offers the option to have another representative from your organization to be notified via cc when the contract is sent to the signatory. If you would like to enable this option, please provide the name and email address of the individual to be cc'd. If your organization does not consent to e-sign. I will email you the contract to print, sign and mail back to my attention. Thank you very much. Please let me know if you have any questions.

- Contractors do **not** need a DocuSign *account* to eSign
- Minimum system requirements needed to enjoy the DocuSign experience (after navigating to a document from the link provided in DGS' "eSignature trigger email").
 - https://support.docusign.com/en/guides/ndse-user-guide-system-requirements 0

4. Steps to eSign:

Note: all information listed in this documentation below (names, email addresses, and other information) is for illustrative purposes only.

4.1. Standard procedure

- After receiving DGS' "eSignature trigger email", click Review Document:



- In the browser window that appears, click Continue:

())) thtps://de	emo docusign.net 🔎 = 🔒 DocuSign C 🎯 Details DocuSign	■ DocuSign × C	- ロ × 命令®
File Edit View Favo	rites Tools Help		
Please Revi	ew & Act on These Documents		DGS
Matt Walter State of Call	rs formia Department of General Services (TEST)		Powered by Docu Signs
(This will be the stand	sard message wording)		*
Please review the	documents below.	CONTIN	OTHER ACTIONS
	DocuSign Environe (D. SED03A63-94D6-46E3-8FBE-20830A1126A6 STATE OF CALIFORNIA STATE OF CALIFORNIA	DEMONSTRATION DOCUMENT ONLY PROVIDED BY DOCUMENT ONLYE INCOMING SERVICE BYD AND, SMIR TOX - Samta - Washington 88104 - D www.docogo.com	06) 219-0200
	STD 213 (Rev 06/02)	NUMERANY MUNRER Sample 10002	
		INCOSTRUCTION NOMBER	
	This Agreement is entered into between the State A state Agreement is entered into between the State A presentment of General Sensees Office of Rule	Agency and the Contractor named below.	

- Read through the document and navigate to the eSignature tag. When done, as a shortcut, you can navigate back to the tag by clicking *Start*:

File Edit View Favorites	locusign.net. ♀ •	- □ × 命☆戀 ⁶
Please review the doc	ments below. FINISH	OTHER ACTIONS
	@ Q ⊻, ⊑ 0	Ľ
START	DoulSign Envelope ID: 3E803A63-9406-40E3-8FBE-28B30A1126A6 STATE OF CALIFORNIA STANDARD AGREEMENT STD 213 (Rev 06/03) AGREEMENT NUMBER STD 213 (Rev 06/03) RecISTRATION NUMBER	
	This Agreement is entered into between the State Agency and the Contractor named below: ETATE AGENCYS NAME Department of General Services, Office of Business and Acquisition Services CONTRACTORS NAME Pest Management Vendor	
	2. The term of this Agreement is: 9/1/2018 through December 31, 2019 or upon DGS/OBAS approval, whichever is later	
	3. The maximum \$200,000.00 of this Agreement	

- After you have navigated to the eSignature tag (_____), click on the tag to apply your eSignature (which may require you select a signature style), then click Finish:

Note: The for eSignature (llowing is how the will look <u>aft</u> Step 1, below).	<u>er</u> clicking t	he eSignature tag a	and applying the
File Edit View Favorites	locusign.net. ⊅ = 🛔 DocuSign Č 🌌 Details DocuSign Tools: Help	DocuSign	×	- □ × ☆ ☆ [@] [©]
Done! Select Finish to	send the completed document.		FINISH	OTHER ACTIONS
		±- = ③		1
	CONTRACTOR'S NAME (if other than an individual, state whether a corporation, part Pest Management Vendor	tership, elc.J	California Department of General Services Use Only	^ ۲
	BY (AuthOneorganity and a second seco	DATE SIGNED (Do not (ype)	-	

	ଭ୍ର	±₁ 🖬 (3)		Ľ
	CONTRACTOR	nie parues nereto.	California Department of General	2
	CONTRACTOR'S NAME (if other than an individual, state whether a corporation, part Pest Management Vendor	tership, etc.)	Services use only	
	Kichard (Leu	DATE SIGNED(Do not type) August 13, 2018 6	37 PM PDT	
	PRINTED INKNEAND THE OF PERSON SIGNING Richard Chu, President			
	ADDRESS 4100 Arden Way Sacramento, CA 95812			
	AGENCY NAME De Banning, Sireston Particles, Office of Business an	d Acquisition		
	By conductive signature applied of other of business of	DATE SIGNED(Do not lype) August 14, 2018		
	Matt Walters	ialist I	Exempt per: GC 14616	
	ADDRESS 707 3 rd Street, West Sacramento, CA 95605			
	STD 213 Sample 10002 w Exhibits.pdf		1 of 2	
	DocuSign Envelope ID: 3EB03A63-94D6-40E3-8FBE-2BB30A1126A6	DEMONSTRAT PROVIDED BY 909 3rd Ave, S www.docusign.	TION DOCUMENT ONLY DOCUSIGN ONLINE SIGNING SERVICE uite 1700 - Seattle - Washington 98104 - (206) 219-02 com	
Powered by DocuSign.		Ghange Language - Eng	pish (US) ▼ Terms Of Use & Privacy ▼ Gr	pyright © 2018 DocuSign Inc. V2R

The next screen will ask if you want to sign in to DocuSign (if you have an account, which is not required). If you don't have an account, or don't want to sign in, click No Thanks:



4.2. When you access a DocuSign envelope, but are not ready to eSign

Sometimes you might click on the link in DGS' "eSignature trigger email" to review the document, but are not yet ready to eSign it. In this case, click *Finish Later*:

	FINISH	OTHER ACTIONS
0		Finish Later
DEMONSTRATION DOCUMENT ONLY PROVIDED BY DOCUSIGN ONLINE SIGNING SERVICE 999 3rd Ave, Suite 1700 + Seattle Washington 98104 + (206) 219-0200 www.docusign.com	2	Contact eSign Admin 업 About DocuSign 亿
SampleNEWStd213Templ-20180823		View History
REGISTRATION NUMBER Test123456		View Certificate (PDF)
ontractor named below:		Session Information

4.3. When you access a DocuSign envelope and cannot sign the contract, as written

If you have read through the document and determined that there is some reason that you simply cannot sign it, you have the option to *Decline to Sign* the document:

Important: Before declining to sign, please reach out to OBAS' Acquisition Analyst to discuss your concerns, as they might be able to be addressed, without having to issue an updated DocuSign envelope.



5. Additional Authentication

For some documents requiring an eSignature, OBAS may require *additional authentication*, before the signatory can access the document to eSign. When additional authentication is necessary, you will receive SMS text on your cell phone with *access code* that you will need to enter, before being able to access the document you are being asked to eSign.

Important: In order to be able to receive your access code via SMS text message, you must have responded to OBAS' Award Notification Email with the *cell phone number of the signatory*.

6. Voided envelopes

In some cases, it will be necessary for the OBAS Acquisition Analyst to void a DocuSign envelope. Typically, this will occur when one or more signatories will not eSign a document, because there are required changes to the underlying document. When this happens, the current envelope will be voided and a new, replacement envelope will subsequently be sent.

After the Acquisition Analyst has voided an envelope, all recipients who have received the envelope will receive an email indicating that the envelope has been voided, and a large VOID watermark will be displayed on every page of the voided document:





7. Q&A:

- 7.1. How do I know the document being eSigned has been signed by all parties?
 - DocuSign automatically emails all parties (including the CC's) that the document has been completed:



- After clicking on *View Completed Document* in the accompanying email, you can also access the *DocuSign certificate*, which should say <u>Completed</u>. There are two ways you can accomplish this:
 - Other Actions > View Certificate



Note: your browser settings may prevent this approach, in which case you should follow the second approach outlined below. For example, your browser might give you the following error:

Adobe PDF Document	×
Protected Mode must be enabled to view PDFs in Internet Explorer's Enhanced Protected Mode (EPM). Either enable Protected Mode by choosing Edit > Preferences > Security (Enhanced) > Enable Protected Mode at startup, or disable EPM in Internet Explorer.	
ОК	

• Or, you can download the certificate to view it:

		1	CLOSE	OTHER ACTION
	Q Q 🛃 🖶	0		
DocuSign Envelope ID: E38182C8-E883-489D 900F STATE OF CALFORMA STANDARD AGREEMENT STD 213 (Rev 0603)	Combined PDF C Separate PDFs C	REMONSTRY TON DOCUMENT OR Y SAME SAME SAME SAME SAME SAME SAME SAME	0	
		Test123456		

...after working through the various browser/system prompts you might receive, you will see files for each of the *eSigned document*, as well as the *certificate* (which you can, then, view and print):

	- -			Compressed Folder Tools	Please_DocuSign_STD_213_SampleNEW_MS_WORD.zip		- 0	×
File	Home	Share	View	Extract				~ ?
$\leftarrow \rightarrow$	× 🛧	🚪 « Micr	osoft > V	Vindows → INetCache →	IE > YMWFHFLB > Please_DocuSign_STD_213_SampleNEW_MS_WORD.zip ~	õ	Search Please_DocuSign_STE	D ,P
4 0	eSig	gned D	ocume	ent Name	A	_	Туре	C
x Q	nd			式 STD	_213_SampleNEW_MS_WORD_TEMPL_20180823_w_Exhibits_(For_Testing_and_Procedures).pdf		Adobe Acrobat Docun	ment
ر چې ار مې	neDrive - D Archive and	GS d slush	ertifica	te Sum	imary.pdf		Adobe Acrobat Docun	ment

• DocuSign certificate, showing the status as <u>Completed</u>:



7.2. When can the I commence work?

Once you have been contacted by the DGS Contract Administrator.

- 7.3. How do I save and/or print an eSigned document for my own records?
 - To <u>only</u> print the eSigned document:

	DEMONSTRATION DOCUMENT ONLY		
uSign Envelope ID: E38182CB-E883-489D-930F-C2 STATE OF CALIFORNIA STANDARD AGREEMENT	26838F32A1 PROVIDED BY DOCUSION ORLINE SKANING SERVICE 993 3rd Avs. Sulle 1700 + Saattle + Washington 98104 + (206) 219-0200 www.docusign.com		
STD 213 (Rev 06/03)	AGREEMENT NUMBER SampleNEWStd213Templ-20180823		
	REGISTRATION NUMBER		
1 This Anreement is entered into betwee	on the State Anency and the Contractor named below:		
Note: your browser follow the second a	settings may prevent this approach, in which pproach outlined below. For example, your burror:	case you rowser n	u should night give
Note: your browser follow the second a you the following e	settings may prevent this approach, in which pproach outlined below. For example, your bu rror:	case you rowser n	u should night give
Note: your browser follow the second a you the following e	settings may prevent this approach, in which pproach outlined below. For example, your be rror: Adobe PDF Document	case you rowser n	u should night give
Note: your browser follow the second a you the following e	settings may prevent this approach, in which pproach outlined below. For example, your bi rror:	case you rowser n	u should night give
Note: your browser follow the second a you the following e	settings may prevent this approach, in which pproach outlined below. For example, your bi rror: Adobe PDF Document Protected Mode must be enabled to view PDFs in Internet Explorer Enhanced Protected Mode (EPM). Either enable Protected Mode to	case you rowser n	u should night give
Note: your browser follow the second a you the following e	Settings may prevent this approach, in which pproach outlined below. For example, your bi rror: Adobe PDF Document Protected Mode must be enabled to view PDFs in Internet Explorer' Enhanced Protected Mode (EPM). Either enable Protected Mode b choosing Edit > Preferences> Security (Enhanced) > Enable Prot Mode struture or directed EDM in Enternet Emplorer	case you rowser n ×	u should night give
Note: your browser follow the second a you the following e	Settings may prevent this approach, in which pproach outlined below. For example, your birror: Adobe PDF Document Protected Mode must be enabled to view PDFs in Internet Explorer' Enhanced Protected Mode (EPM). Either enable Protected Mode be choosing Edit > Preferences> Security (Enhanced) > Enable Prot Mode at stratup, or disable EPM in Internet Explorer's	case you rowser n ×	u should night give
Note: your browser follow the second a you the following e	Settings may prevent this approach, in which pproach outlined below. For example, your be rror: Adobe PDF Document Protected Mode must be enabled to view PDFs in Internet Explorer' Enhanced Protected Mode (EPM). Either enable Protected Mode b choosing Git's Preferences> Security (Enhanced) > Enable Protected Mode at startup, or disable EPM in Internet Explorer.	case you rowser n ×	u should night give

- Otherwise, follow the steps outlined above for downloading and viewing the certificate, in order to save and/or print the eSigned document (as well as the certificate, if you want):

7.4. Who do I contact about OBAS' eSignature process, if I have questions?

All questions regarding the given procurement should be directed back to the OBAS Acquisition Analyst handing the procurement (via the *From:* email address on the original Award Notification Email).

Questions specific to OBAS' eSignature process should be sent to OBASHelpline@dgs.ca.gov.