



OBAS PROCEDURES

DocuSign Implementation

Abstract

This document contains the detailed, step by step user instructions for sending an envelope in DocuSign for eSignature

Document Owner: Laura Frost
Laura.Frost@dgs.ca.gov

Change Log

Chg #	Changed By	Change Date & Time	Summary of Key Changes
1	M.Walters	08/29/2018, 5:34pm	Initial release
2	M. Rodriguez	10/22/2018, 8:53am	Addition of SCO emails to recipients list to generate CC for stamped contracts.

Contents

SCOPE:	4
STANDARD PROCEDURES:	4
1. Submit Fi\$Cal Requisition	4
2. Intake Requisition	4
3. Review Goods/Services Request	4
4. Conduct Solicitation	4
5. Award Contract	4
6. Is OLS Approval Required?	5
7. Create and Send Envelope in DocuSign	5
7.1. Login to DocuSign	5
7.2. Create Envelope	7
7.2.1. Prepare a new envelope	7
7.2.2. Add Recipients to the Envelope	9
7.2.3. Envelope Custom Fields	13
7.2.4. Message to All Recipients	14
7.3. Review Document Tags and Send the Envelope	14
8. Contractor eSigns STD 213	15
8.1. Trigger email to Contractor	15
8.2. Steps for Contractor eSign	16
8.3. When the Contractor isn't ready to eSign	17
8.4. When the Contractor refuses to eSign	18
9. Specify DGS Approver	18
9.1. Trigger email to OBAS Router	18
9.2. Specifying the DGS Approver	18
10. DGS Representative eSigns STD 213	19
11. Approve Contract in DocuSign (OBAS eStamp)	20
11.1. Final review and eStamping	20
11.2. If you aren't ready to eStamp	23
11.3. When you cannot approve the document	23
11.4. The completed document	25
12. Print Signed STD 213 (w/Exhibits) from DocuSign and distribute.	26
13. Create Contract w/ Attachments in Fi\$Cal	27

OTHER OPTIONS:	27
1. Additional authentication	27
2. Shared Envelopes.....	28

Scope:

Procedures for using DocuSign to obtain signatures for STD 213s that are within OBAS' authority. Contracts that require OLS Approval will be included after we establish procedures with OLS.

Standard Procedures:

Notes:

- These procedures refer to the business process model, (*OBAS Contract Execution – STD 213 eSignature Release – Conceptual - OBAS eStamp (and Authority).vsdx*)
- The highest level procedure #s below, and their descriptions, align to this process model.

1. Submit FI\$Cal Requisition

(No change to existing process)

2. Intake Requisition

(No change to existing process)

3. Review Goods/Services Request

(No change to existing process)

4. Conduct Solicitation

(No change to existing process)

5. Award Contract

Business process change (Revised content of current Award Notification Email)

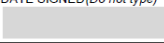
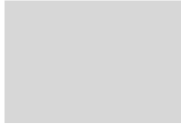
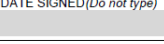
- Explain DGS's eSignature process
- Have the Contractor reply to confirm the email for the Contractor's Signer (including: name, title and email address), or opt-out of the electronic signature process.
- Create Contract (STD 213/213A/213IT and Exhibits, with Contract headers) utilizing the OBAS' updated MS Word templates (where the signature block has been formatted to work with the DocuSign template you will ultimately be using).

Important: The signature block cannot deviate from the template standard (wording or layout), and it must be pre-populated as follows, before ultimately uploading to DocuSign):

- Fields highlighted in **Yellow** must be pre-populated
- Fields highlighted in **Gray** must be left blank (including the Printed Name and Title of the person signing for the State of California)

Items shown with an Asterisk (*), are hereby incorporated by reference and made part of this agreement as if attached hereto. These documents can be viewed at www.dgs.ca.gov/ols/Resources/StandardContractLanguage.aspx.

IN WITNESS WHEREOF, this Agreement has been executed by the parties hereto.

CONTRACTOR		California Department of General Services Use Only
CONTRACTOR'S NAME (if other than an individual, state whether a corporation, partnership, etc.) Pest Management Vendor		
BY (Authorized Signature) 	DATE SIGNED (Do not type) 	
PRINTED NAME AND TITLE OF PERSON SIGNING Richard Chu, President		
ADDRESS 4100 Arden Way Sacramento, CA 95812		
STATE OF CALIFORNIA		
AGENCY NAME Department of General Services, Office of Business and Acquisition Services		
BY (Authorized Signature) 	DATE SIGNED (Do not type) 	
PRINTED NAME AND TITLE OF PERSON SIGNING 		
ADDRESS 707 3rd Street, West Sacramento, CA 95605		
		☒ Exempt per: GC 14616

- Merge the STD 213 MS Word file, along with all Exhibit files, into a **single *.pdf file** - using current naming convention which includes the contract #.

Important: File >> Save as Adobe PDF works the best (other means of generating a *.pdf seem to cause problems in DocuSign, as it relates to OBAS' STD213A template).

- Route to Manager for Review.

6. Is OLS Approval Required?

If Yes, current procedures will be followed, using paper contract and wet signatures.

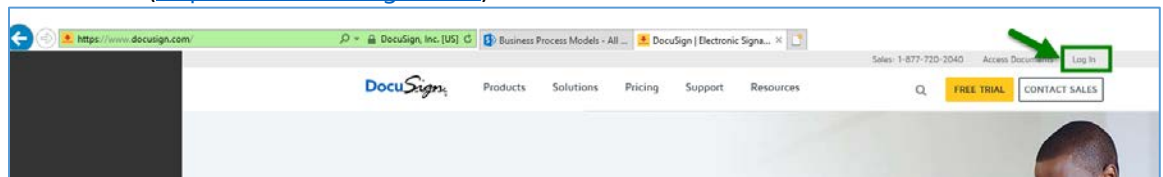
7. Create and Send Envelope in DocuSign

7.1. Login to DocuSign

Important: Please use DGS' Internet browser standard, Internet Explorer 11 (IE 11) when working in DocuSign. Although Google Chrome works for some users, the behavior is not consistent.

- Access the DocuSign login screen:

Production (<https://www.docusign.com/>)

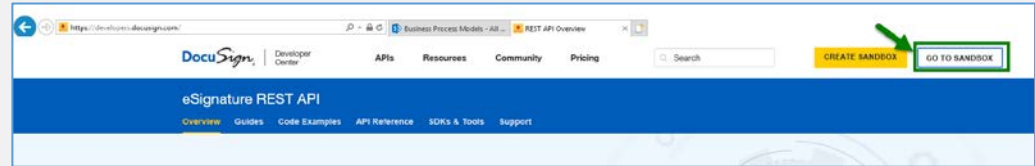


(Note: After clicking Log In, the URL will become, <https://account.docusign.com/#/username>)

Note:

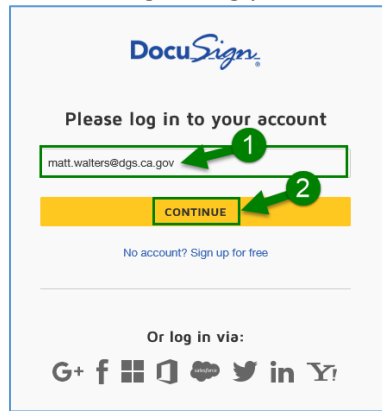
If you are ever asked to log into the Test environment (also called the “*Sandbox environment*”), here is the pathway:

“Sandbox” (<https://developers.docusign.com/>)



(Note: After clicking Log In, the URL will become, <https://account-d.docusign.com/#/username>)

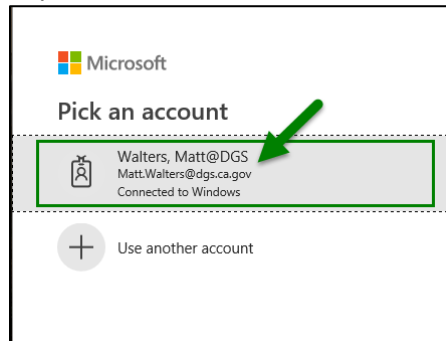
- Login to DocuSign using your DGS email address.



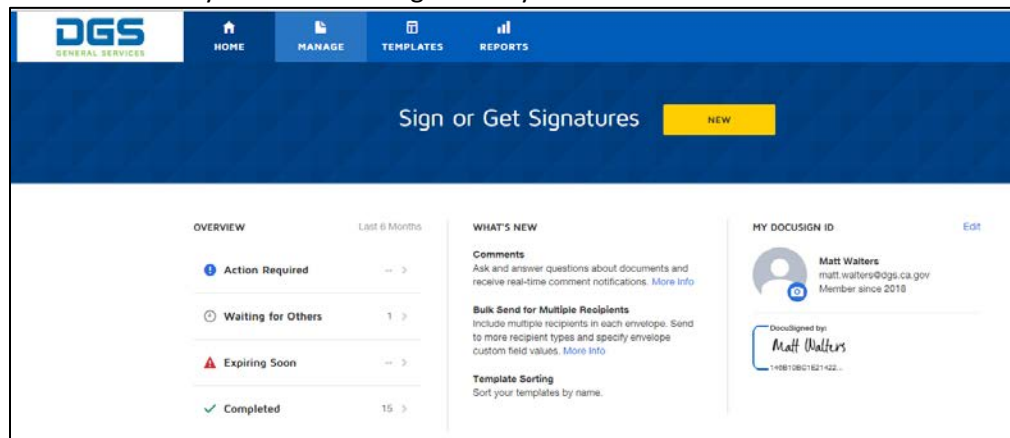
- When prompted for the Password, do not enter your Password, but select *Use Company Login*:



- Select your DGS email account:



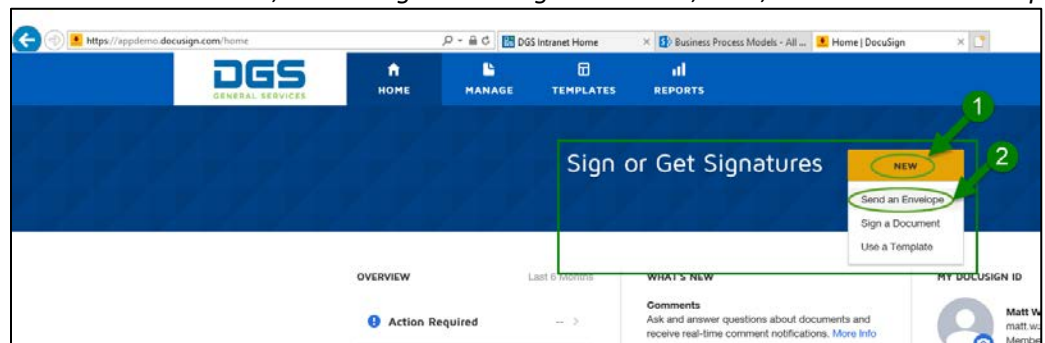
- You will know when you are in DocuSign when you see this screen:



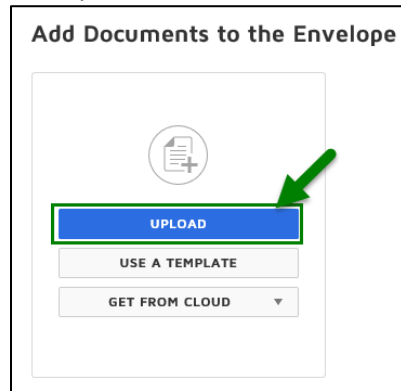
7.2. Create Envelope

7.2.1. Prepare a new envelope

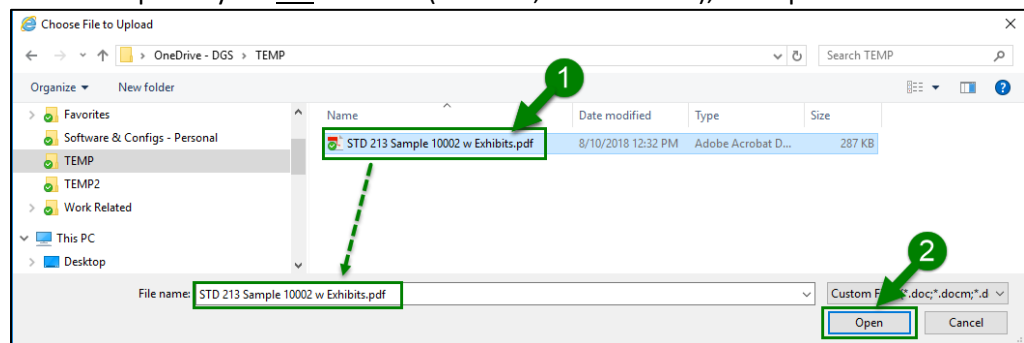
- o Click on the *New* button, next to *Sign or Get Signatures* and, then, select *Send an Envelope*:



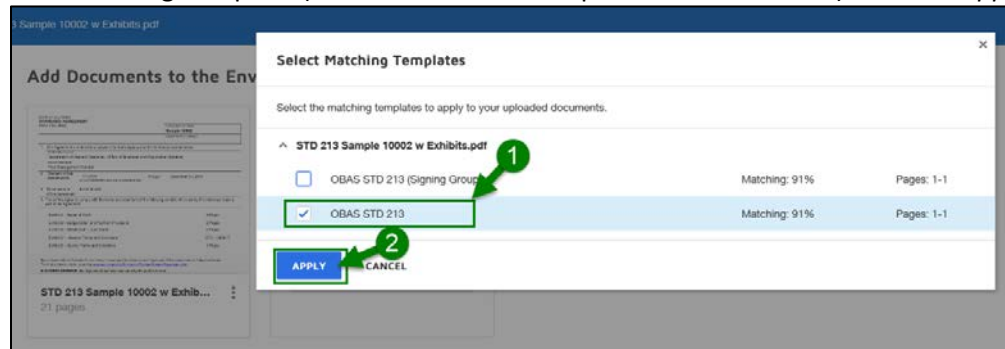
- o Select *Upload*:



- o Locate the *.pdf of your full contract (STD 213, *with Exhibits*), and upload it:

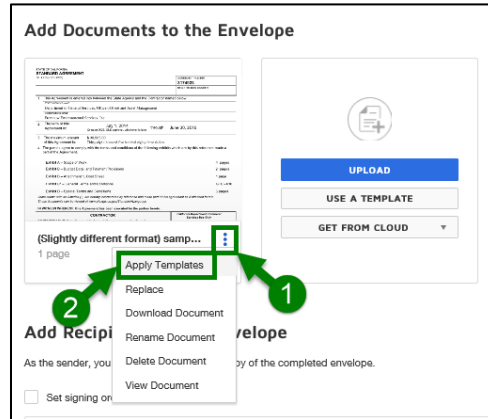


- o Select Matching Template (the OBAS STD 213 template should be listed) and click *Apply*:

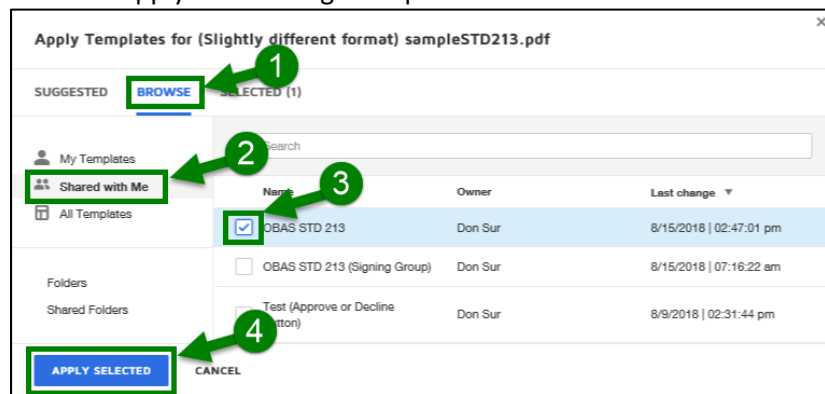


Note: As discussed above, 'OBAS STD 213' is currently the only one *DocuSign* template for all STD 213 variants (STD 213/213A/213IT). Underlying this *DocuSign* template is OBAS' MS Word template for the STD 213 (not the STD 213A or STD 213IT). Because the formats of OBAS' STD 213, STD 213A, and STD 213IT template vary, DocuSign might not match its template ('OBAS STD 213') to the STD 213A or STD 213IT *.pdf file that you're uploading. When this happens, you'll need to search for DocuSign's 'OBAS STD 213' and manually apply it.

- Steps to manually locate and apply the 'OBAS STD 213' *DocuSign* template
 - Choose to manually apply a template



- Locate and apply the DocuSign template



7.2.2. Add Recipients to the Envelope

o Overview

Note: the following sub-sections of this procedure relate to the DocuSign screen prints below (where you will be specifying values for the fields bordered in **Green**). The #s on the far left of this screen indicate the sequence in the signing ceremony (whether or not the designated person will actually eSign).

Add Recipients to the Envelope

As the sender, you automatically receive a copy of the completed envelope.

☒ Set signing order

1

Contractor
 Name
 Email

NEEDS TO SIGN MORE

1

DGS Requesting Division
 Name
 Email

CC RECEIVES A COPY MORE

2

DGS Requesting Division
 Name
 Email

CC RECEIVES A COPY MORE

3

OBAS Router
 Name
 Email

SPECIFY RECIPIENTS MORE

4

DGS Signer
 Name
 Email

NEEDS TO SIGN MORE

5

DGS Requesting Division
 Name
 Email

CC RECEIVES A COPY MORE

6

OBAS Stamper
 Name
 Email

NEEDS TO SIGN MORE

7

DGS Requesting Division
 Name
 Email

CC RECEIVES A COPY MORE

8

SCO 1
 Jutta Wiechec
 JWiehcec@sco.ca.gov

CC RECEIVES A COPY MORE

9

SCO 2
 Jason Hollingsworth
 JHollingsworth@sco.ca.gov

CC RECEIVES A COPY MORE

+ ADD RECIPIENT

Two of the same sequence #'s means these steps occur in parallel.

Names & email addresses for subsequent occurrences of this recipient will be auto-populated.

SKIP for now: will be specified by the OBAS Router after the envelop is sent...

o **Contractor** (1st in the “signing ceremony” sequence)

Important: The Signer’s *Name* entered in this step will be the same as the eSignature that will appear on the final eSigned document. Therefore, be sure the name entered here matches the Contractor Name on the STD 213 that was uploaded earlier in this procedure.

- Enter the Contractor’s Name, *exactly as it was entered on the STD 213* (but, *without* their title)
- Enter the Contractor’s Email Address.

o **DGS Requesting Division**

- Enter the Requesting Division’s Contact Name
- Enter the Requesting Divisions’ Email Address

Note: The *DGS Requesting Division* is listed multiple times in the DocuSign workflow sequence (as they will get copies of the document being eSigned, multiple times. You’ll only need to enter the associated *Name* and *Email* Address once, then DocuSign will automatically populate these fields for subsequence instances of the same recipient. As such, the *DGS Requesting Division* won’t be repeated in the procedures, below.

o **OBAS Router**

Note: The “OBAS Router” role is assigned the *Specify Recipients* action, which will specify the *Name* and *Email* of the “DGS Signer”, after the envelope has been sent, and the Contractor has eSigned.

- Enter the Name of the Acquisition Analyst sending the envelope
- Enter the Email Address of the Acquisition Analyst sending the envelope

o **DGS Signer**

(**Leave blank:** see discussion above under OBAS Router. After the DocuSign envelope has been sent and the Contractor has eSigned, the Acquisition Analyst (Sender) will be specifying the name and email address of the *DGS Signer*)

o **OBAS Stamper**

Note: The “OBAS Stamper” role will apply OBAS’ newly developed eStamp. Having this role in place, allows the Acquisition Analyst to validate the STD 213 w/Exhibits (e.g. printed names match signatures) - as well as receipt of all required Contractor documentation - *before* they conclude the “signing ceremony” by applying the eStamp.

- Enter the Name of the Acquisition Analyst sending the envelope
- Enter the Email Address of the Acquisition Analyst sending the envelope

Note: In some cases, OBAS might elect to have the Acquisition Analyst *actually responsible for the procurement* apply OBAS’ eStamp (instead of the *Acquisition Analyst SME* sending the envelope). This decision will be made on a case by case basis.

o (Optional) The Sender can specify *Additional Recipients* to receive a copy of the document being signed (at any point in the “signing ceremony sequence”).

- Click *Add Recipient* at the bottom of the existing list of roles

o **SCO Copies**

Note: SCO does not auto populate on the recipients list but should receive a copy of all stamped contracts. Follow the procedure outlined on page 12 to specify two additional recipients, SCO 1 - Jutta Wiechec (JWiechec@sco.ca.gov) and SCO 2 - Jason Hollingsworth (JHollingsworth@sco.ca.gov), using the sequence number immediately following OBAS Stamper.

o **SCO Copies** (continued from previous page)

- Click *Add Recipient* at the bottom of the existing list of roles
- Enter role: **SCO 1**, name: Jutta Wiechec and email: JWiechec@sco.ca.gov.
- Click *Add Recipient* again to add second SCO recipient to receive a copy.
- Enter role: **SCO 2**, name: Jason Hollingsworth and email: JHollingsworth@sco.ca.gov.
- Make sure to select **CC receives a copy** for both of these recipients.

7 DGS Requesting Division CC RECEIVES A COPY ▾ MORE ▾

Name

Email

ADD RECIPIENT

- After the new section appears, enter the *Role*, *Name*, and *Email* address of the new person being added to the signing ceremony sequence. Then, select the action, *Receives a Copy*:

8

Role

Name

Email

CC RECEIVES A COPY ▾ MORE ▾

- Keep or change the signing ceremony sequence #

8

Role

Name

Email

CC RECEIVES A COPY ▾ MORE ▾

- o If kept as is, the new role will receive a copy of the fully eSigned document (at the end of the process).

Signing Order Diagram

SENDER

1 MW

2 CC DD

3 DD

4 OR

5 DS

6 DD

7 DS

8 CC

COMPLETED

CLOSE

To display the *Signing Order Diagram*:

ADD FROM CONTACTS SIGNING ORDER

NEEDS TO SIGN ▾ MORE ▾

- Or, you can manually enter an earlier sequence #, which will send a copy of the STD 213 w/Exhibits *at the given point* in the signing ceremony workflow (e.g. with some, or none, of the eSignatures).

If you do manually enter an earlier sequence #, the new role new will perform their action (*Receive a Copy* in this case) at the same time as the role that currently holds the chosen sequence # (in other words, the two roles will take their action in parallel). For example, if you want a “Contractor Executive” to receive a copy of the STD 213 w/ Exhibits at the same time as the Contractor resource responsible for signing the contract, you’d change the sequence # for the new role to be ‘1’ and the “Signing Order Diagram” would look like:



Note: If you’d like to return the signing order to be in series (no parallel steps), you must manually update all of the sequence #s.

7.2.3. Envelope Custom Fields

Note: Currently, the only Custom Field is the *Form Name*, which will be used to gather operational metrics. Until more forms are run through DocuSign, the value in this field will default.

- Leave *Form Name* defaulted to ‘OBAS STD 213’ (which represents *DocuSign’s* template “STD 213 template” and its usage for all of OBAS’ STD 213/213A/213IT envelopes)

The form is titled "Envelope Custom Fields". It contains a single field labeled "Form Name" with a dropdown menu. The dropdown menu is currently set to "OBAS STD 213".

7.2.4. Message to All Recipients

- o There will be a default *Subject* for all messages, which should not be changed
- o There will also be a default *Message* that should not be changed. However, the Acquisition Analyst may add additional content, if necessary.

Important: Keep in mind that this message will be included on all emails generated to all roles in the signing ceremony.

7.3. Review Document Tags and Send the Envelope

- Click the *Next* button

- The screen that appears after clicking *Next*

Note: After clicking the *Next* Button, the STD 213 will be displayed with tags where the eSignatures and OBAS' eStamp will be required. You should not need to adjust the location of these tags, if you used *OBAS' standard template* for the STD 213, and kept the *original template wording (and format)* of the signature block.

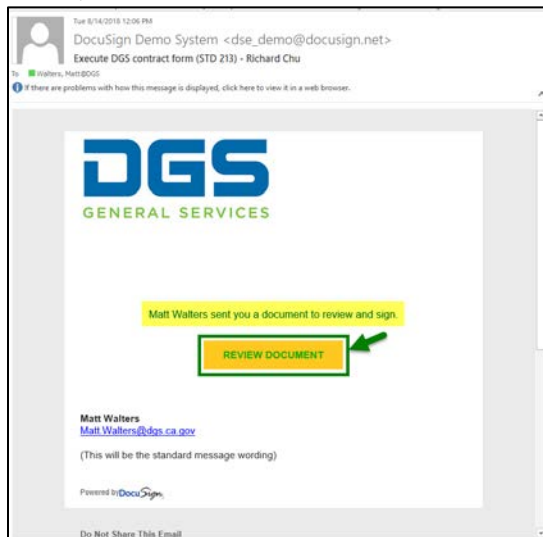
- Click the Send Button

- DocuSign immediately sends an email to the Contractor's email.

8. Contractor eSigns STD 213

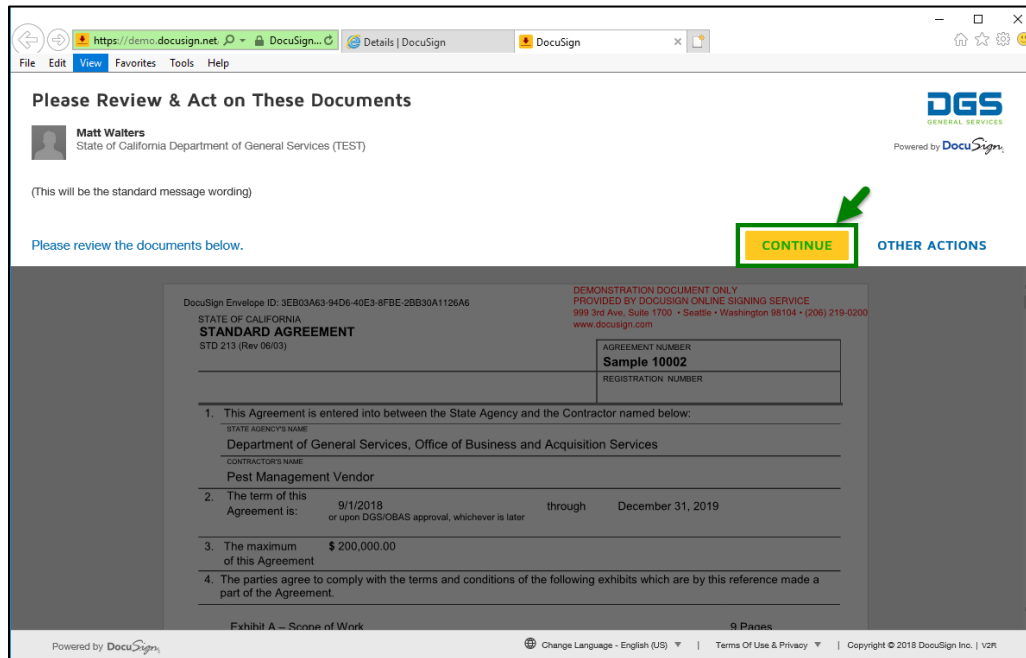
8.1. Trigger email to Contractor

Once the DocuSign envelope has been sent, the Contractor will receive an email like the following. To proceed, the Contractor will click *Review Document*:

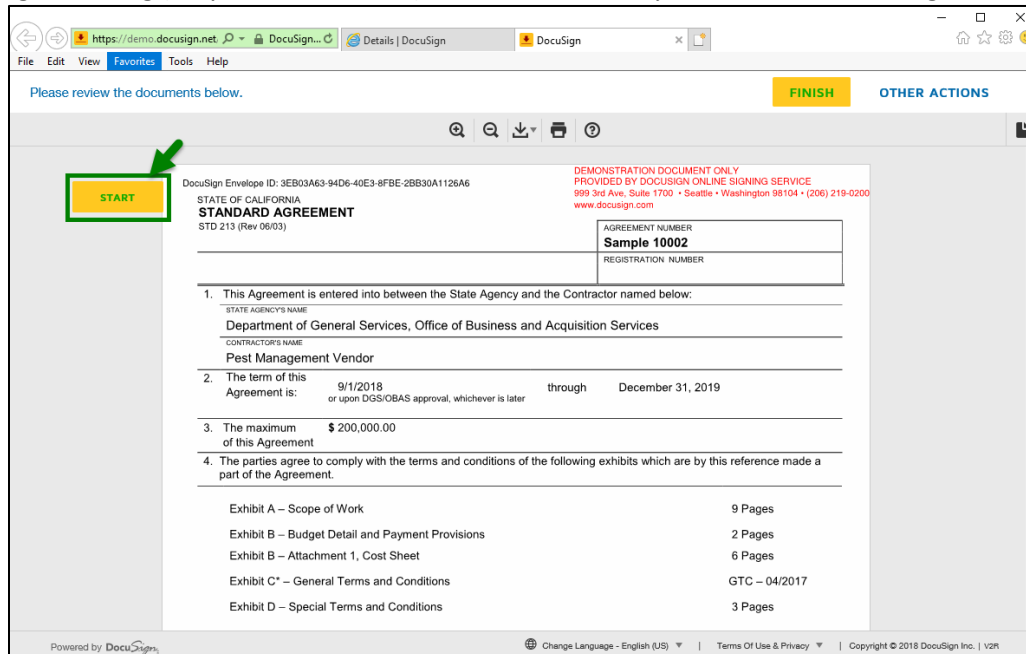


8.2. Steps for Contractor eSign

- The Contractor will click *Continue*:

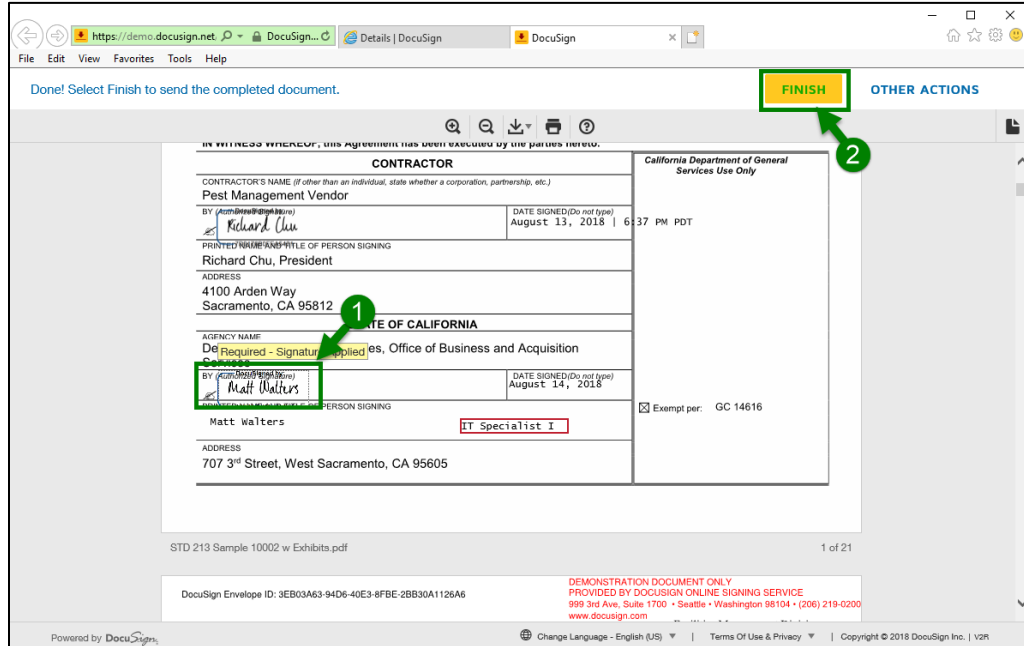


- Then, the Contractor will scroll down to read through the STD 213 w/ Exhibits and navigate to the eSignature tag (only theirs will show). As a shortcut, they can click *Start* to navigate to the tag.



- After DocuSign has moved the cursor to the location to be eSigned, the Contractor will click on the eSignature tag (), apply their eSignature, and click *Finish*:

Note: The following is how the will look after clicking the eSignature tag and applying the eSignature (Step 1, below).



Done! Select Finish to send the completed document.

FINISH **OTHER ACTIONS**

IN WITNESS WHEREOF, this Agreement has been executed by the parties hereto.

CONTRACTOR

CONTRACTOR'S NAME (If other than an individual, state whether a corporation, partnership, etc.)
Pest Management Vendor

BY (Name/Title/Signature)
Richard Chu

DATE SIGNED (Do not type)
August 13, 2018 | 6:37 PM PDT

PRINTED NAME/TITLE OF PERSON SIGNING
Richard Chu, President

ADDRESS
4100 Arden Way
Sacramento, CA 95812

STATE OF CALIFORNIA

AGENCY NAME
Department of General Services, Office of Business and Acquisition

BY (Name/Title/Signature)
Matt Walters

DATE SIGNED (Do not type)
August 14, 2018

PRINTED NAME/TITLE OF PERSON SIGNING
Matt Walters

IT Specialist I

ADDRESS
707 3rd Street, West Sacramento, CA 95605

Exempt per: GC 14616

STD 213 Sample 10002 w Exhibits.pdf 1 of 21

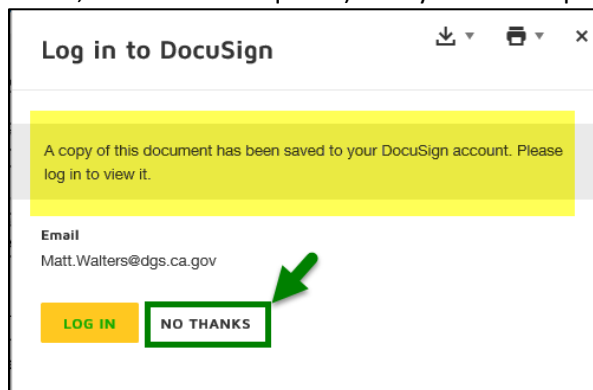
DocuSign Envelope ID: 3EB03A63-94D6-40E3-8FBE-2BB30A1126A6

DEMONSTRATION DOCUMENT ONLY
PROVIDED BY DOCUSIGN ONLINE SIGNING SERVICE
999 3rd Ave, Suite 1700 • Seattle • Washington 98104 • (206) 219-0200
www.docusign.com

Powered by DocuSign

Change Language - English (US) | Terms Of Use & Privacy | Copyright © 2018 DocuSign Inc. | V2R

- The next screen will ask if the Contractor if they want to sign in to DocuSign (if they have an account, which is not required). They have the option to log in, or just click *No Thanks*:



Log in to DocuSign

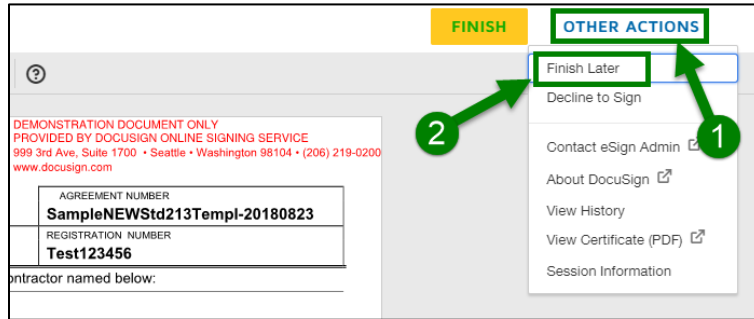
A copy of this document has been saved to your DocuSign account. Please log in to view it.

Email
Matt.Walters@dgs.ca.gov

LOG IN **NO THANKS**

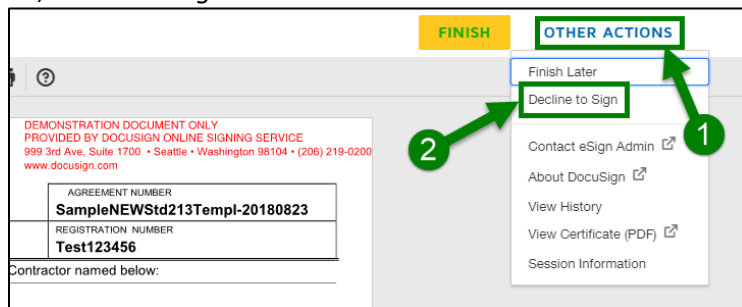
8.3. When the Contractor isn't ready to eSign

- If the Contractor has already navigated to the document to eSign it, and they are not sure they want to approve the document, they should select *Other Actions* and, then, *Finish Later*.



8.4. When the Contractor refuses to eSign

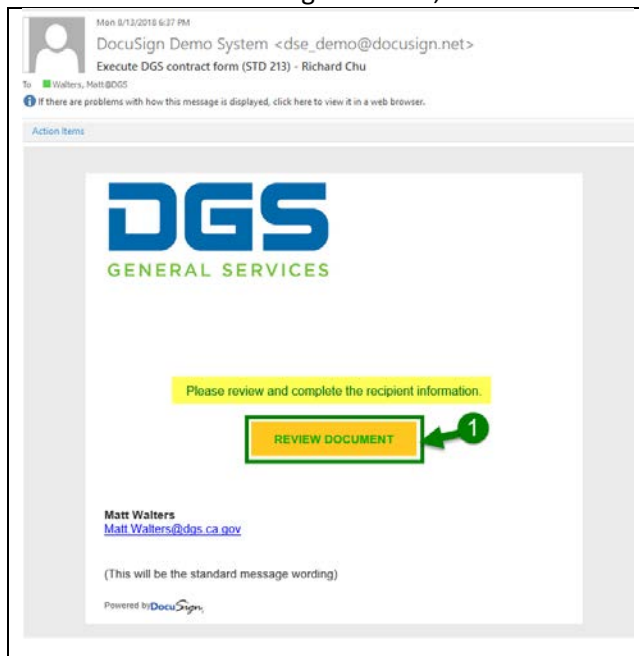
- If the Contractor simply decides not to sign the document, they should select *Other Actions* and, then, *Decline to Sign*.



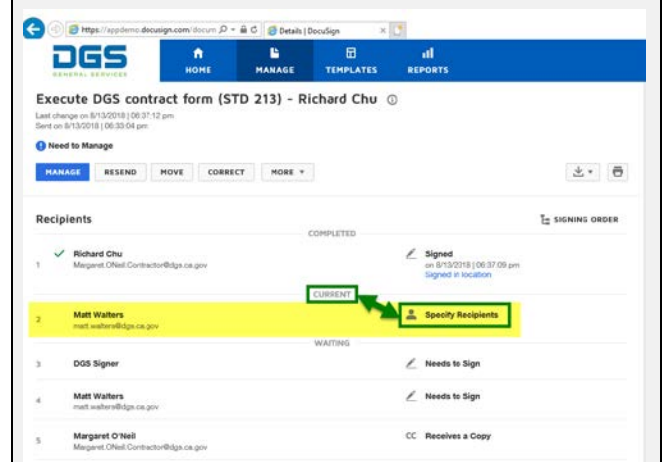
9. Specify DGS Approver

9.1. Trigger email to OBAS Router

- After the Contractor eSigns, you will receive the following DocuSign email (left-hand screen shot). After receiving the email, click the *Review Document* button (per the left-hand screen shot):



Note: if you go back to your *Sent items* folder in DocuSign (under the *Manage* button at the top of DocuSign) and open the given envelope, the signing ceremony workflow status will look like the screen print below.



9.2. Specifying the DGS Approver

- Enter the *Email* address and *Name* of the DGS Signer, based on delegated authority levels and availability, then click *Complete and Send*:

Important: The *DGS Signer's Name* entered in this step will be the same as the eSignature that will appear on the final eSigned document. Therefore, be sure the name entered here exactly matches how the eSignature should appear. The *DGS Signer* will be an OBAS Manager (determined based on their delegated authority).

https://demo.docusign.net/ Identified... Details | DocuSign DocuSign

DocuSign Envelope ID: 3F803A63-6D56-40F3-8F8F-09B03A1156A6

DEMONSTRATION DOCUMENT ONLY
PROVIDED BY DOCSIGN ONLINE SIGNING SERVICE
on 08/104 • (206) 219-0200

You have been asked to review and add recipient information.
Please enter the email address and name for the associated role and select "Complete and Send".

Role	Email	Name
DGS Signer	Mutt Walters@dgs.ca.gov	Mutt Walters

or Signing Group: -- Select a Signing Group --

COMPLETE AND SEND Show Document

3. The maximum of this Agreement. \$ 200,000.00

4. The parties agree to comply with the terms and conditions of the following exhibits which are by this reference made a part of the Agreement.

Exhibit A – Scope of Work	9 Pages
Exhibit B – Budget Detail and Payment Provisions	2 Pages
Exhibit B – Attachment 1, Cost Sheet	6 Pages
Exhibit C* – General Terms and Conditions	GTC – 04/2017

OTHER ACTIONS +

Powered by DocuSign

English (US) | Terms of Use & Privacy | Copyright © 2018 DocuSign Inc.

- When the confirmation window appears, click *Done*:

DocuSign Envelope ID: 3ED03A63-94D6-40E3-8FBE-2DB30A1126A6

STATE OF CALIFORNIA
STANDARD AGREEMENT
 STD 213 (Rev 06/03)

DEMONSTRATION DOCUMENT ONLY
 PROVIDED BY DOCUSIGN ONLINE SIGNING SERVICE
 999 3rd Ave, Suite 1700 • Seattle • Washington 98104 • (206) 219-0200
www.docuSign.com

AGREEMENT NUMBER
Sample 10002
 REGISTRATION NUMBER

1. This Agreement is between:
 STATE AGENCY'S NAME
Department of General Services
 CONTRACTOR'S NAME
Pest Management Services, Inc.

2. The term of this Agreement is: **12 months**

3. The maximum value of this Agreement is: **\$100,000.00**

4. The parties agree to comply with the terms and conditions of the following exhibits which are by this reference made a part of the Agreement.

Exhibit A – Scope of Work 9 Pages
 Exhibit B – Budget Detail and Payment Provisions 2 Pages
 Exhibit B – Attachment 1, Cost Sheet 6 Pages
 Exhibit C* – General Terms and Conditions GTC – 04/2017

ADDRESSING COMPLETE
 You have completed assigning your recipients.
 SIGN DONE

er 31, 2019

OTHER ACTIONS +

Powered by DocuSign

English (US) | Terms Of Use & Privacy | Copyright © 2016 DocuSign, Inc.

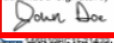
10. DGS Representative eSigns STD 213

Before eSigning, the DGS Representative (which will be an OBAS Manager) should check for inconsistencies in the Contractor signature block of the STD 213 (and in the DocuSign Certificate):

- Inconsistencies in the Contractor signature block

Items shown with an Asterisk (*), are hereby incorporated by reference and made part of this agreement as if attached hereto. These documents can be viewed at www.dgs.ca.gov/ols/Resources/StandardContractLanguage.aspx.

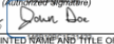
IN WITNESS WHEREOF, this Agreement has been executed by the parties hereto.

CONTRACTOR		California Department of General Services Use Only
CONTRACTOR'S NAME (if other than an individual, state whether a corporation, partnership, etc.) Pest Management Vendor		
BY (Typed Name) 	DATE SIGNED (Do not type) August 20, 2018	
PRINTED NAME AND TITLE OF PERSON SIGNING Richard Chu, President		
ADDRESS 4100 Arden Way Sacramento, CA 95812		

- Navigating to the DocuSign Certificate

Items shown with an Asterisk (*), are hereby incorporated by reference and made part of this agreement as if attached hereto. These documents can be viewed at www.dgs.ca.gov/ols/Resources/StandardContractLanguage.aspx.

IN WITNESS WHEREOF, this Agreement has been executed by the parties hereto.

CONTRACTOR		California Department of General Services Use Only
CONTRACTOR'S NAME (if other than an individual, state whether a corporation, partnership, etc.) Pest Management Vendor		
BY (Typed Name) 	DATE SIGNED (Do not type) August 20, 2018	
PRINTED NAME AND TITLE OF PERSON SIGNING Richard Chu, President		
ADDRESS 4100 Arden Way Sacramento, CA 95812		

OTHER ACTIONS

- Finish Later
- Void
- Correct
- Contact eSign Admin
- About DocuSign
- View History
- View Certificate (PDF)**
- Session Information

- Inconsistencies in the Certificate

Signer Events	Signature	Timestamp
John Doe matt.walters@dgs.ca.gov Rockstar Dept. of General Services Security Level: Email, Account Authentication (None)	DocuSigned by:  146B10BC1E21422... Signature Adoption: Pre-selected Style Using IP Address: 165.235.122.147	Sent: 8/20/2018 8:06:09 PM Viewed: 8/20/2018 8:06:33 PM Signed: 8/20/2018 8:06:55 PM

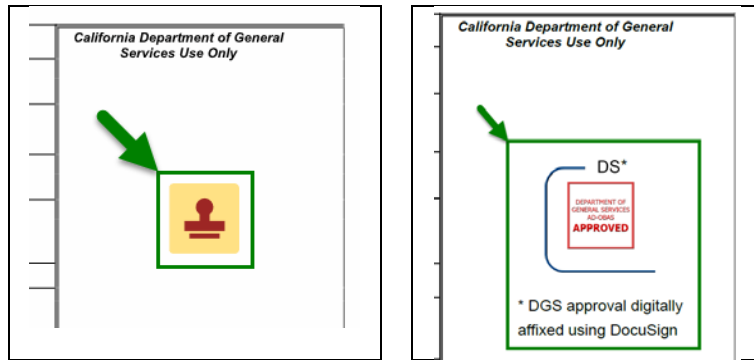
Note: after reviewing the consistency of the Contractor's eSignature, the process for the DGS Representative to sign the STD 213 is the same as it was for the Contractor to sign (as outlined earlier in this procedure). Please follow the steps under that section (*Contractor eSigns STD 213*)

11. Approve Contract in DocuSign (OBAS eStamp)

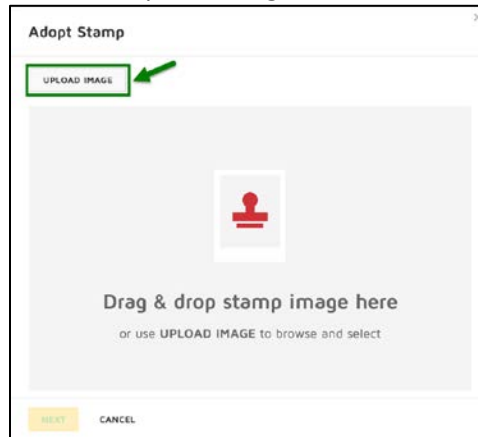
Note: the email you will receive to trigger you to eStamp the STD 213, as well as your steps to navigate to the eStamp tag (📎), are the *same* as the email to eSign and the steps to navigate to an eSignature tag (📎): please see the procedure above for *Contractor eSigns STD 213*.

11.1. Final review and eStamping

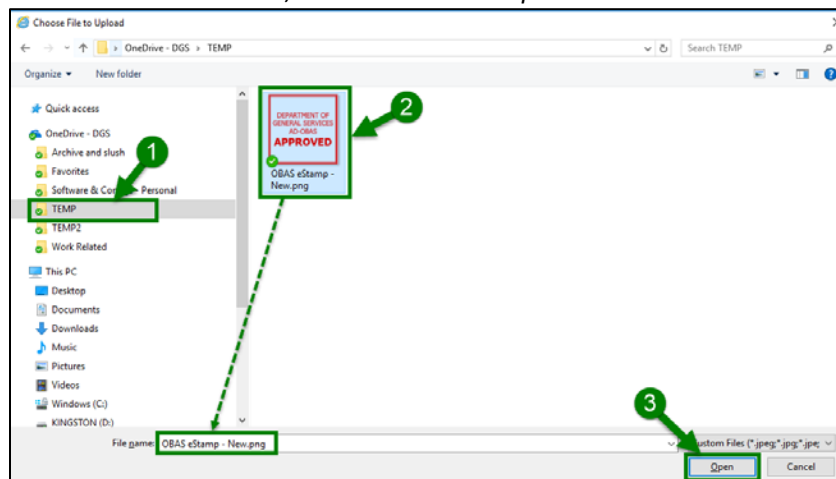
- If everything is correct on the document you're about to eStamp (including the consistency of signatures and names), and you have all required documents from the Contractor (outside of DocuSign), then apply the OBAS eStamp and select *Finish*.



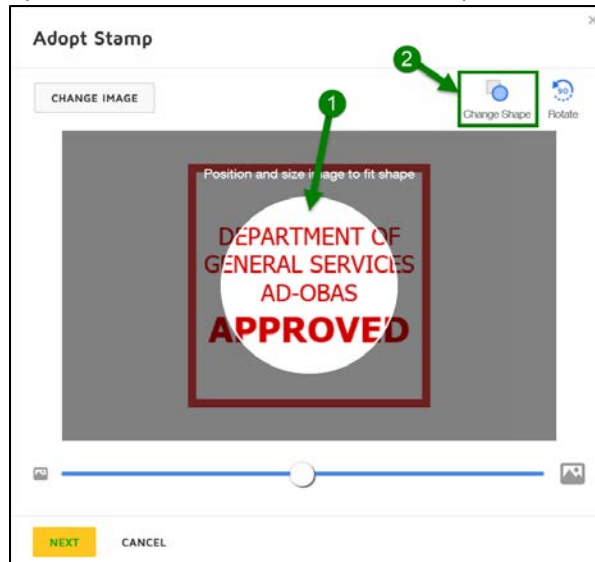
- o The first time you upload your (OBAS Standard) OBAS eStamp (until you have “adopted” the eStamp), you will need to choose the format (round or square), and resize the eStamp to its largest allowable size within the eStamp “frame”:
 - Click on the *Upload Image* button



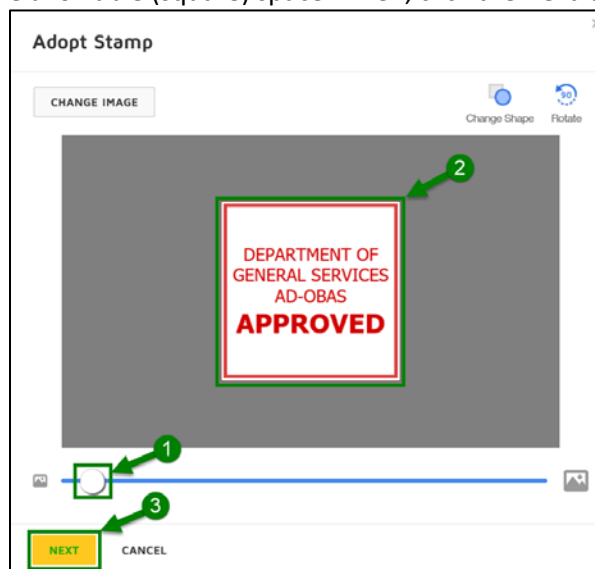
- Navigate to the folder where you have temporarily stored the OBAS eStamp, double-click the filename, then click on the *Open* button



- The default shape will be round. Click on the *Change Shape* icon to change the shape in the middle of the screen to a square



- Move the slider to resize the eStamp, so the border of the eStamp just fits inside the allowable (square) space. Then, click the *Next* button.



- Name your eStamp ("OBAS eStamp" is fine), select the checkbox to make this eStamp your default, then click the *Adopt* button.

Adopt Stamp

DEPARTMENT OF
GENERAL SERVICES
AD-OBAS
APPROVED

Name*
OBAS eStamp

☒ Make this my default stamp

By clicking ADOPT, I agree that the image above will be the electronic representation of my stamp for all purposes when I (or my agent) use them on documents, including legally binding contracts – just the same as a stamp-and-paper.

ADOPT CANCEL

11.2. If you aren't ready to eStamp

- If you have already navigated to the document to eStamp it, and you are unsure of whether you should approve it, select *Other Actions* and, then, *Finish Later*.

DGS
GENERAL SERVICES
Powered by DocuSign

CONTINUE OTHER ACTIONS

Finish Later
Void
Correct
Contact eSign Admin
About DocuSign
View History
View Certificate (PDF)
Session Information

11.3. When you cannot approve the document

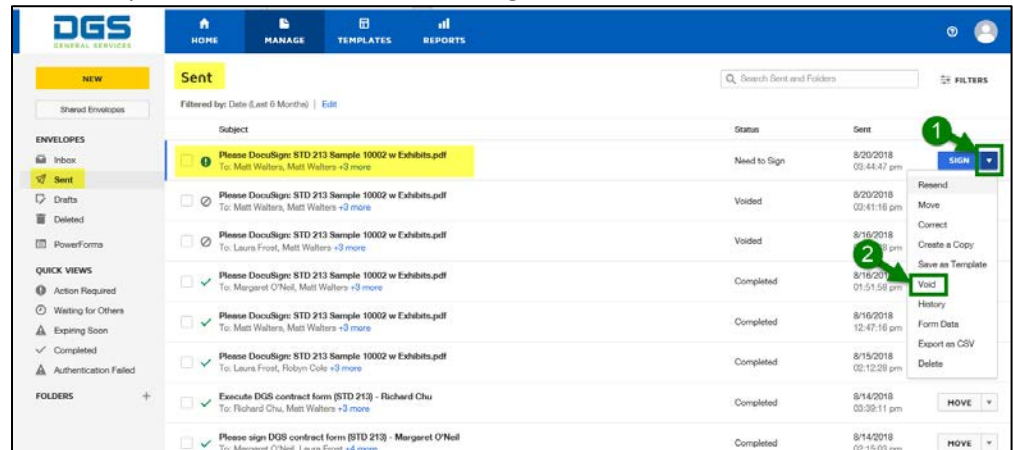
- If there is an issue and you cannot approve the document, select *Void* and enter a *Reason for voiding the envelope*.
 - o Where to find the *Void* option
 - From within the document (after clicking the link in the “trigger email and opening the document to eStamp it)

DGS
GENERAL SERVICES
Powered by DocuSign

CONTINUE OTHER ACTIONS

Finish Later
Void
Correct
Contact eSign Admin
About DocuSign
View History
View Certificate (PDF)
Session Information

- From your *Sent items* folder in DocuSign



- From *inside the envelope* within DocuSign (after single-clicking the given item in your *Sent items* folder)



- o After selecting the *Void* option enter the *Reason for voiding the envelope* and click *Void*

VOID Envelope

By voiding this envelope, recipients can no longer view it or sign enclosed documents. Recipients will receive an email notification, which includes your reason for voiding the envelope.

*** Reason for voiding envelope.**

Determined that there is a required change to one of the Exhibits for this STD 213.

117 characters remaining

VOID

CANCEL

- o After voiding an envelope, recipients who have taken action on 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

Email:

Document:

Note: 'VOID' is repeated on each subsequent page...

11.4. The completed document

- DocuSign automatically emails all parties (including the CC's) that the document was either Completed or Voided.
 - o For completed documents, the email includes a link, so the recipient can view the document:

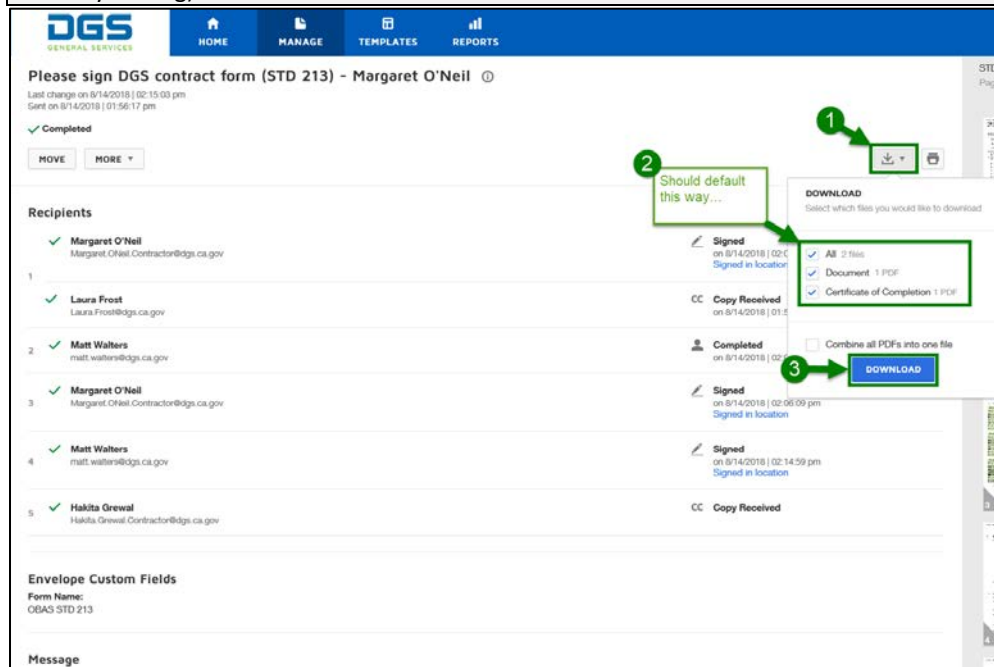
Email:

Document:

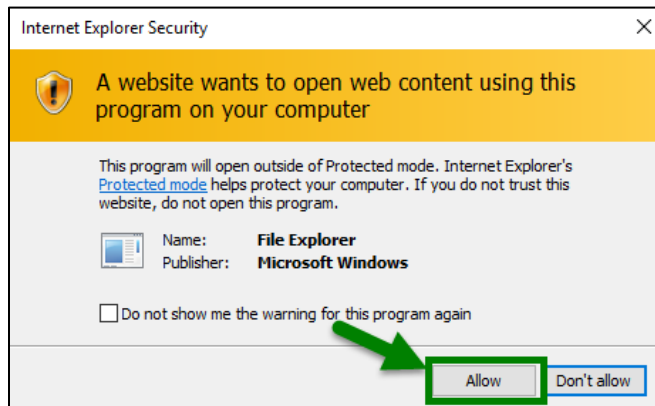
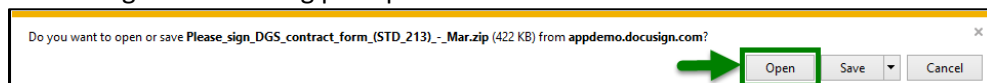
12. Print Signed STD 213 (w/Exhibits) from DocuSign and distribute.

- First, download the *eSigned (*.pdf) document* and *Certificate of Completion* from DocuSign
 - o From *inside the envelope* within DocuSign (after single-clicking the given item in your *Sent items* folder)

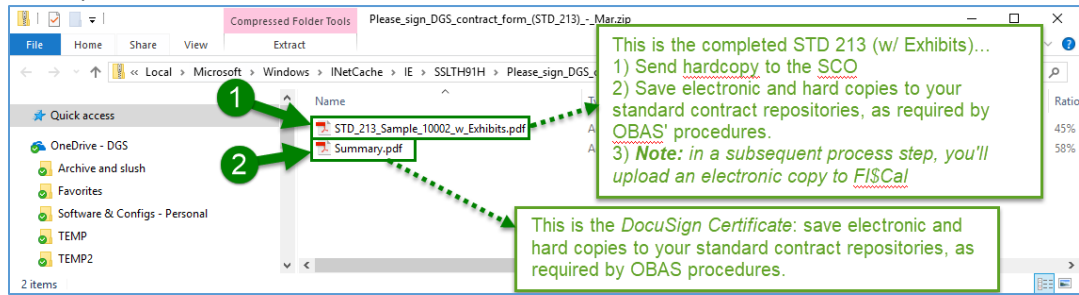
Note: the following steps (downloading the eSigned document and *Certificate of Completion* together from DocuSign, but as separate files) are required to overcome a security setting in IE11, which is set for all DGS users (Internet Options -> Advanced -> Settings -> Security -> Enable Enhanced Protected Mode): this setting prevents you from opening or downloading *.pdf files from within DocuSign. The steps, below, download the both the document, and certificate, into a *.zip file (which isn't impacted by this security setting).



- o Click through the following prompts



- o Then, open, print, distribute, and “save as” the downloaded files, as described in the following screen print:



Note: be sure to distribute the completed STD 213 (w/ Exhibits), *without* the DocuSign Certificate, to the SCO via interoffice mail.

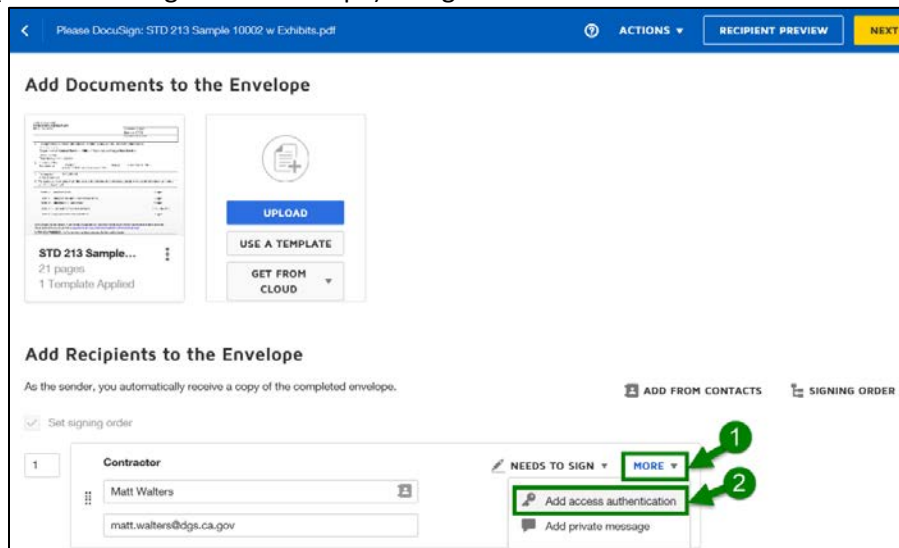
13. Create Contract w/ Attachments in Fi\$Cal

- Upload DocuSigned *.pdf to Fi\$Cal (without the DocuSign Certificate)

Other Options:

1. Additional authentication

- If additional authentication is needed (to ensure the right person is signing on behalf of the Contractor), you may send an authentication code via SMS (cell phone text message)
 - o (When creating a new envelope) Navigate to *Add access authentication*



- o Select SMS \$ as the authentication type and enter the Contractor's *mobile phone* number

Contractor: Matt Walters
matt.walters@dgs.ca.gov

Select access authentication: SMS \$ (1) +1 9169470557 (2) Discard

\$ A fee will be charged per usage.

+ ADD AUTHENTICATION

2. Shared Envelopes

Note: “Sharing envelopes” allows one user to see the “DocuSign inbox” of another user. Using this functionality requires the DocuSign Admin to setup sharing relationships in advance.

- To see someone else's DocuSign inbox, click on *Shared Envelopes* and choose the *name of the person* whose inbox you want to see, and click on *Select*

Shared Envelopes

Name	Email
Margaret O'Neil	Margaret.O'Neil.Contractor@dgs.ca.gov

SELECT CANCEL

- To return to your own inbox

Envelopes belonging to Margaret O'Neil

Return to my envelopes

Inbox

Filtered by: Date (Last 6 Months) | Edit

Subject	Status	Last change
Please DocuSign: STD 213 Sample 10002 w Exhibits.pdf From: Matt Walters	Completed	8/16/2018 01:51:58 pm