



# 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

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### 1. Overview:

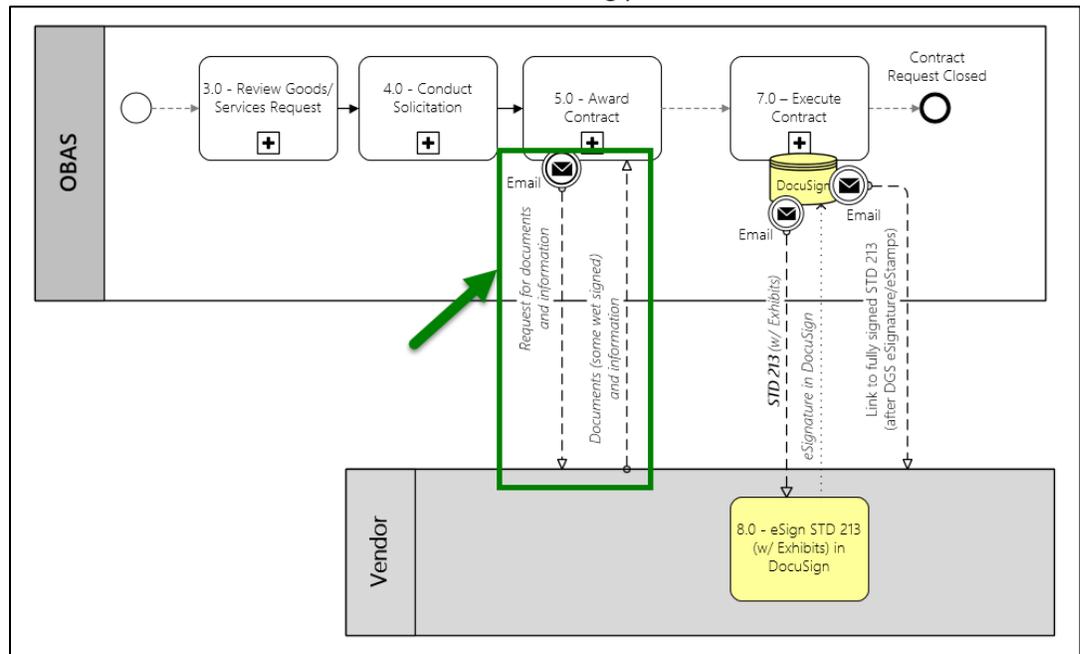
In August 2018, the Office of Business Acquisition Services (OBAS), under the Department of General Services (DGS), started using DocuSign to secure electronic Signatures on the STD 213 contracts it issues. Over time, the goal is to expand DGS' use of eSignatures. Before this happens, you will be notified 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*:
  - o When the email will be sent in the overall contracting process:



- Example of the Award Notification Email:

**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.

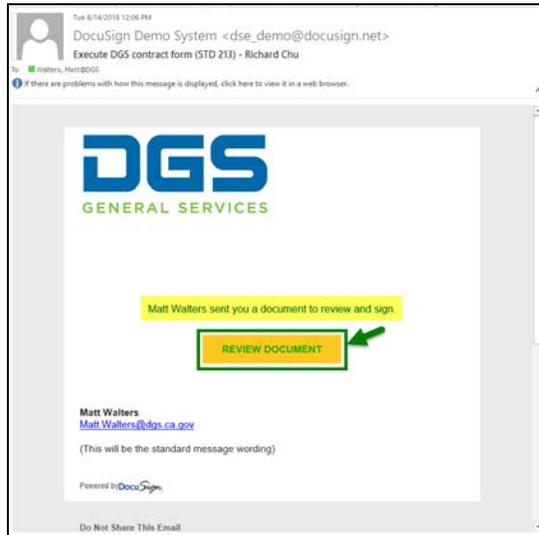
- Contractors do **not** need a DocuSign *account* to eSign
- Minimum system requirements needed to enjoy the DocuSign experience (after navigating to a document from the link provided in DGS' "eSignature trigger email").
  - <https://support.docusign.com/en/guides/ndse-user-guide-system-requirements>

#### 4. Steps to eSign:

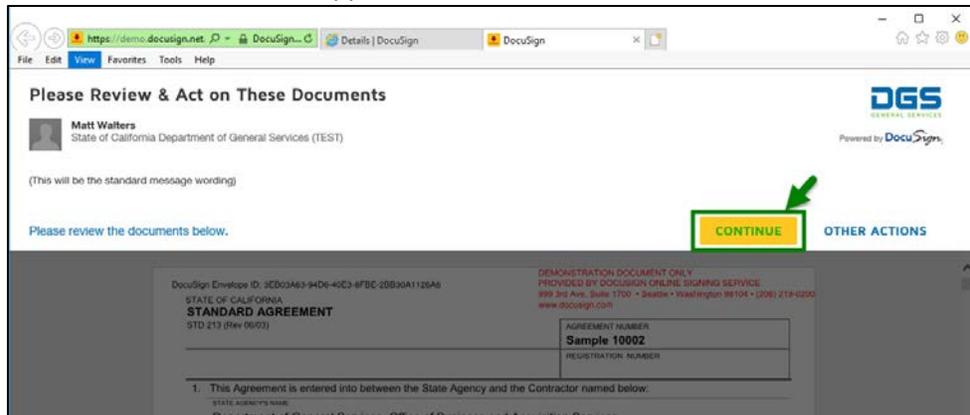
**Note:** all information listed in this documentation below (names, email addresses, and other information) is for *illustrative purposes only*.

#### 4.1. Standard procedure

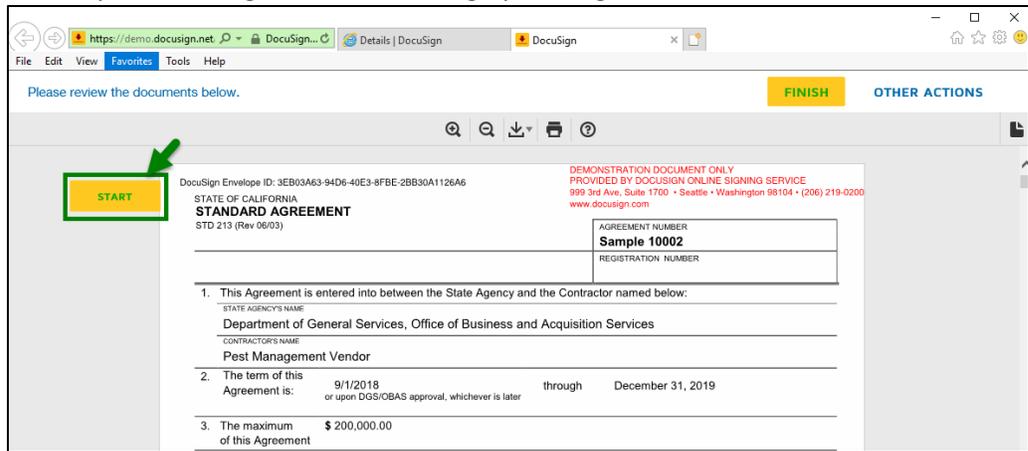
- After receiving DGS' "eSignature trigger email", click *Review Document*:



- In the browser window that appears, click *Continue*:

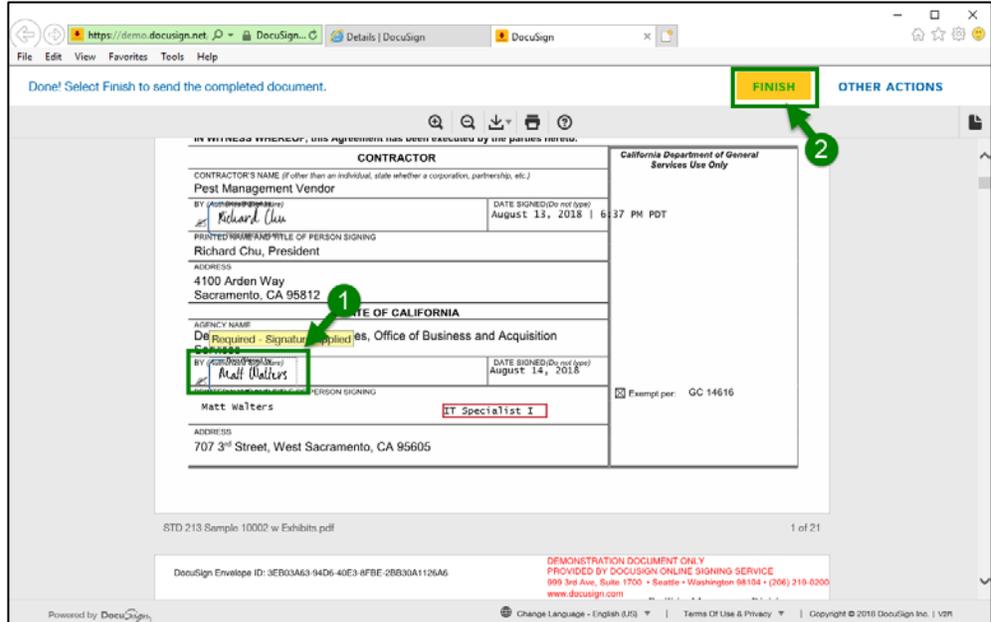


- Read through the document and navigate to the eSignature tag. When done, as a shortcut, you can navigate back to the tag by clicking *Start*:

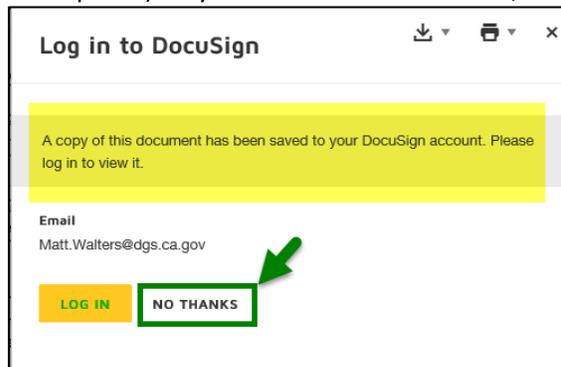


- After you have navigated to the eSignature tag (  ), click on the tag to apply your eSignature (which may require you select a signature style), then click *Finish*:

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

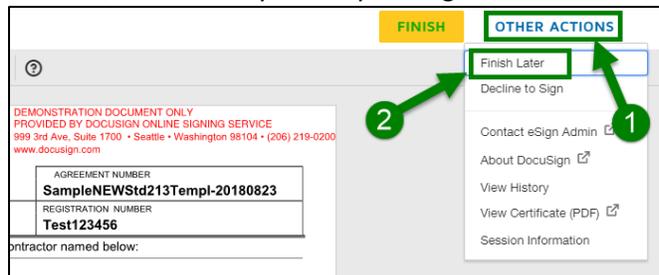


- The next screen will ask if you want to sign in to DocuSign (if you have an account, which is not required). If you don't have an account, or don't want to sign in, click *No Thanks*:



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

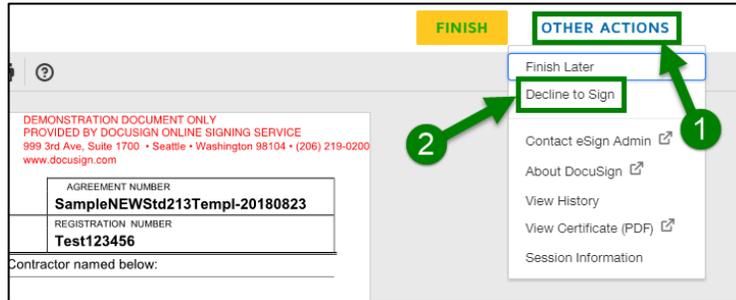
Sometimes you might click on the link in DGS' "eSignature trigger email" to review the document, but are not yet ready to eSign it. In this case, click *Finish Later*:



### 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

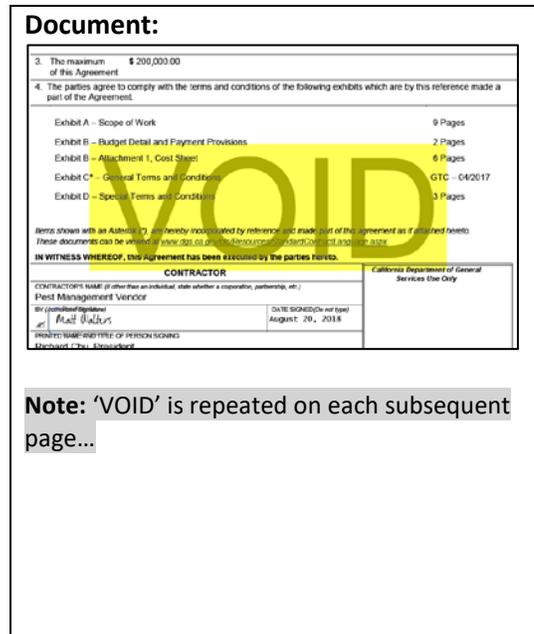
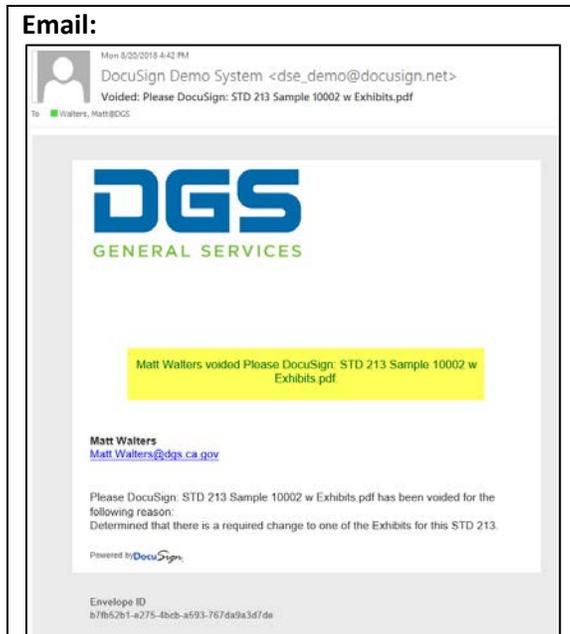
For some documents requiring an eSignature, OBAS may require *additional authentication*, before the signatory can access the document to eSign. When additional authentication is necessary, you will receive SMS text on your cell phone with *access code* that you will need to enter, before being able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

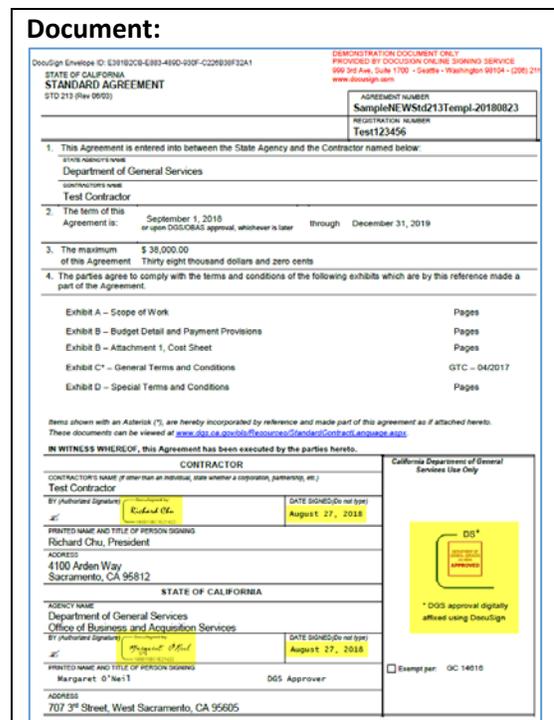
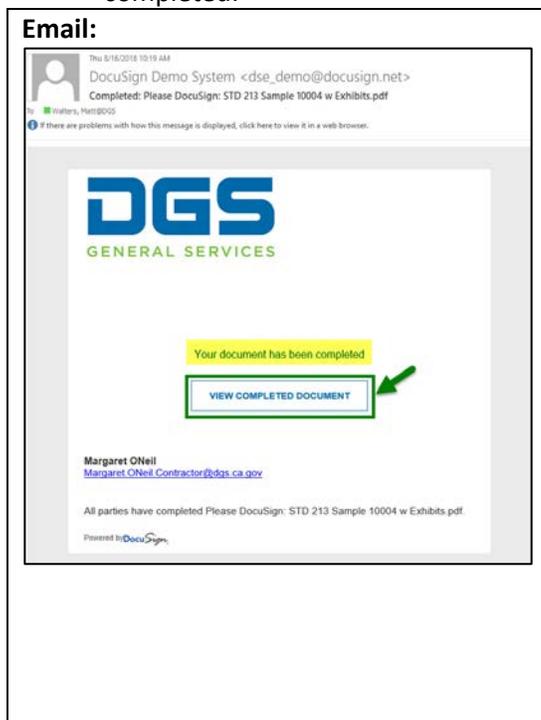
After the Acquisition Analyst has voided an envelope, all recipients who have received the envelope will receive an email indicating that the envelope has been voided, and a large VOID watermark will be displayed on every page of the voided document:



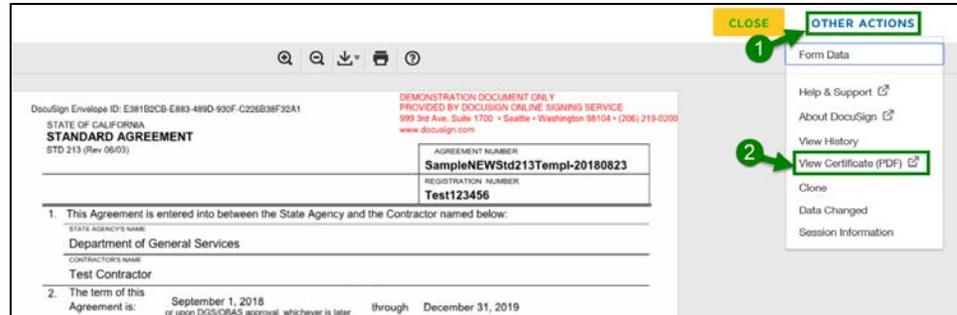
7. Q&A:

7.1. How do I know the document being eSigned has been signed by all parties?

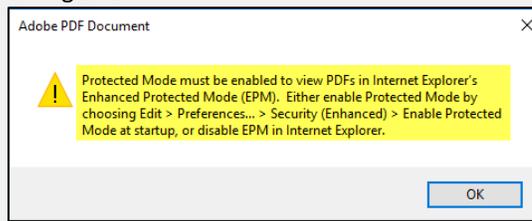
- DocuSign automatically emails all parties (including the CC's) that the document has been completed:



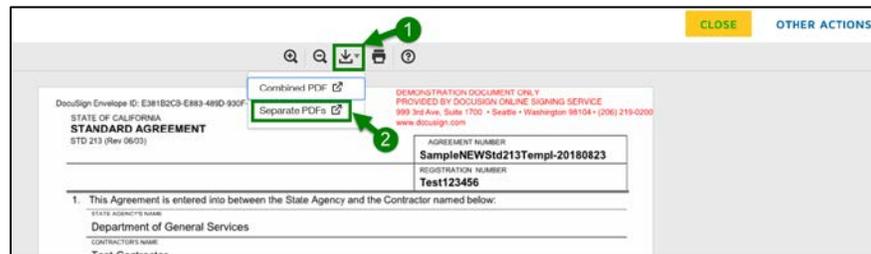
- After clicking on *View Completed Document* in the accompanying email, you can also access the *DocuSign certificate*, which should say Completed. There are two ways you can accomplish this:
  - o *Other Actions > View Certificate*



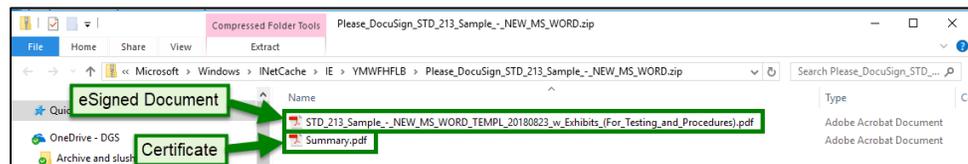
**Note:** your browser settings may prevent this approach, in which case you should follow the second approach outlined below. For example, your browser might give you the following error:



- o Or, you can download the certificate to view it:



...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):



- DocuSign certificate, showing the status as Completed:



### 7.2. When can I commence work?

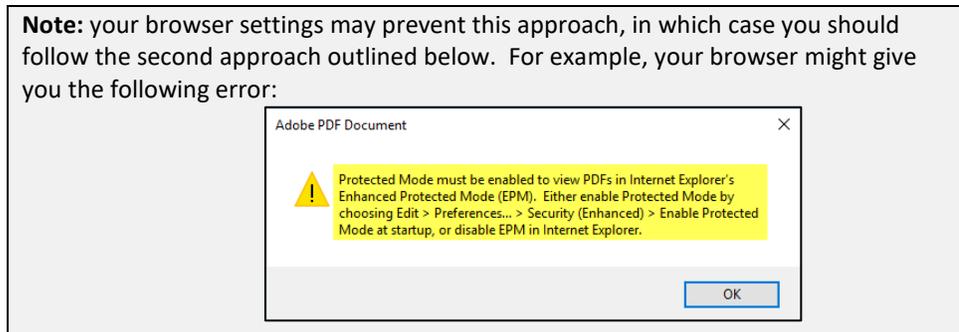
Once you have been contacted by the DGS Contract Administrator.

### 7.3. How do I save and/or print an eSigned document for my own records?

- To only print the eSigned document:



**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:



- 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](mailto:OBASHelpline@dgs.ca.gov).