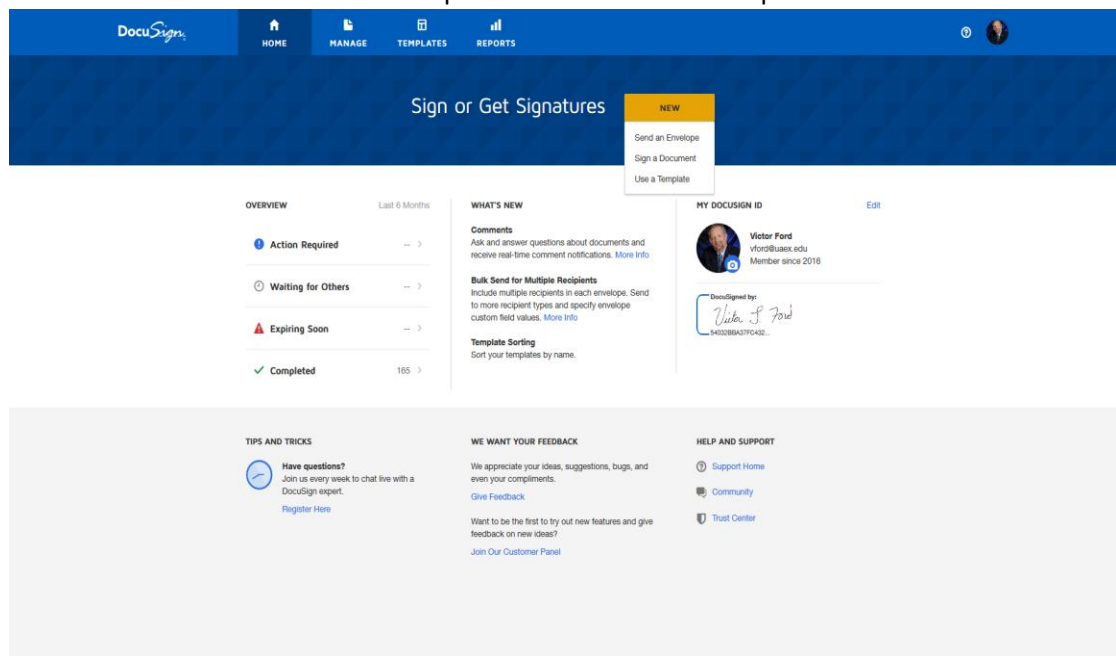


2018 DocuSign Instructions (For Commodity Board Proposal Routing Forms)

2019-2020 Proposals/Awards

1. Extension faculty will use DocuSign and AES faculty will use Adobe Sign.
2. To send documents out using DocuSign you must have access to the program. If you do not have access please email Amy Hedges for a user account.
3. Complete the following before starting DocuSign
 - a. Complete all PI and CO-PI information in the land-use/budget form (this should be the budget that will be submitted with the proposal). Be sure this is the current form with the current fringe benefit rates. Do not use last year's form.
 - b. Proposal document(s).
 - c. Complete the Commodity Board Proposal Routing Form
4. Using DocuSign
 - a. Log into DocuSign
 - b. Click "NEW".
 - c. Click "SEND AN ENVELOPE" at the top of the form from the dropdown menu.



- d. Click “UPLOAD” Folder on the upper left side of the page and select your routing form, proposal, budget, and land use form.

- e. DocuSign will find the template **Proposal Routing Form Commodity Board Adobe** and merge the fields when “APPLY” is clicked. You may have other messages but click the X on the upper right side of the box and continue.

- f. Enter the name and email address of PI’s, Department Heads, and Station Directors.

- g. Check for open signatories and remove them by moving the cursor to the right site of the boxes without entries, click the “X”, and confirm deletion. **THIS STEP IS CRUCIAL.**

The screenshot shows the DocuSign interface for a 'Proposal Routing Form for Commodity Check-Off Funds'. The top navigation bar includes a back arrow, the document title, and 'ACTIONS' and 'NEXT' buttons. The main content is divided into two sections:

- Add Documents to the Envelope:** This section shows a preview of a document titled 'Proposal Routing Form Commo...' with 1 page and 1 template applied. To the right are three buttons: 'UPLOAD', 'USE A TEMPLATE', and 'GET FROM CLOUD'.
- Add Recipients to the Envelope:** This section includes a note that some recipients are locked and cannot be changed. It features a 'Set signing order' checkbox and three recipient slots:
 - Principal Investigator:** Slot 1, with fields for Name and Email, and a 'NEEDS TO SIGN' indicator.
 - Co-PI 1:** Slot 2, with fields for Name and Email, and a 'NEEDS TO SIGN' indicator.
 - Co-PI 2:** Slot 2, with a field for Name, and a 'NEEDS TO SIGN' indicator.

- h. Click “NEXT”.

- i. On the box at the center of the page click “Keep PDF form data”.

This screenshot shows the DocuSign interface with a 'Manage PDF form field data' dialog box open. The dialog box asks 'What would you like to do?' and offers three options:

- Merge data with template fields: This option is selected. It includes an 'Assign to:' dropdown menu.
- Keep PDF form data
- Delete data

 A 'CONFIRM' button is at the bottom of the dialog. The background shows a form for the University of Arkansas System, Division of Agriculture Research & Extension. The form includes fields for PI Name, Co-PI Name, and Proposal Title, along with commodity selection checkboxes (Beef Council, Corn/Grain Sorghum, Cotton, Rice, Soybean, Wheat). A 'SEND' button is visible in the top right corner of the interface.

- j. Click “SEND” at the top and right of the screen.

- k. You and those that were identified on the document will receive an email from DocuSign to attach a signature to the document.
- l. At this point, you may continue submitting proposals or leave DocuSign.