

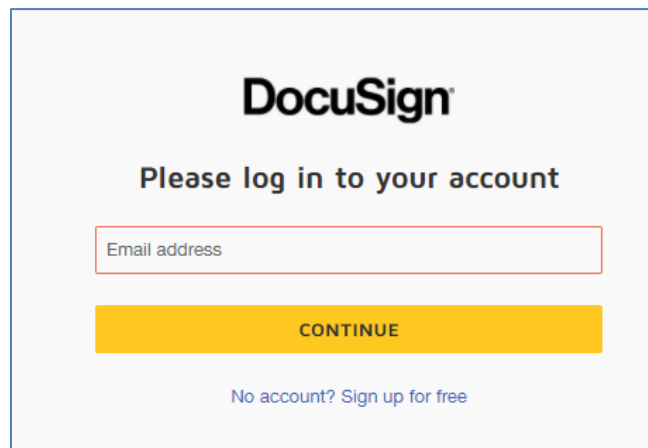
Using University Personnel DocuSign Templates

- 1. You must be logged in with your SJSU account to use SJSU DocuSign templates. If you are not logged in, use your SJSU credentials to access the template.**

DocuSign templates can only be used by people with SJSU accounts. As a student, staff, or faculty, you inherently have a DocuSign account.

This is the most common issue: a user will try to use an SJSU template with a personal account. One that not SJSU.

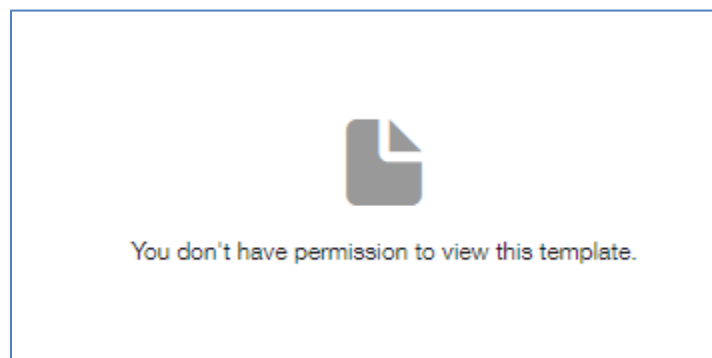
Logging in for the first time you may a screen like this:



The image shows a DocuSign login screen. At the top, the DocuSign logo is displayed. Below the logo, the text "Please log in to your account" is centered. Underneath, there is a text input field labeled "Email address". Below the input field is a yellow button with the text "CONTINUE". At the bottom of the screen, there is a link that says "No account? Sign up for free".

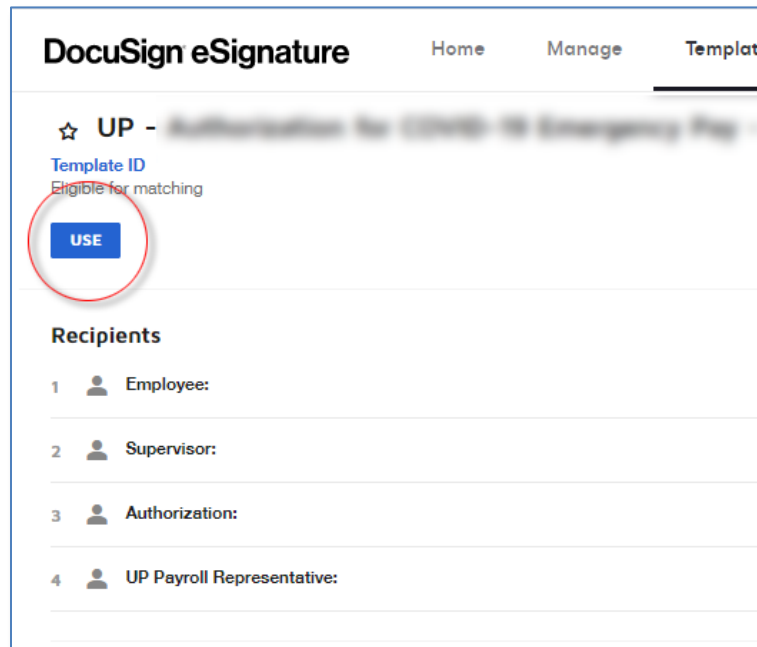
Login using your SJSU email address.

If you are logged in to a non SJSU account, you may encounter a screen like this:

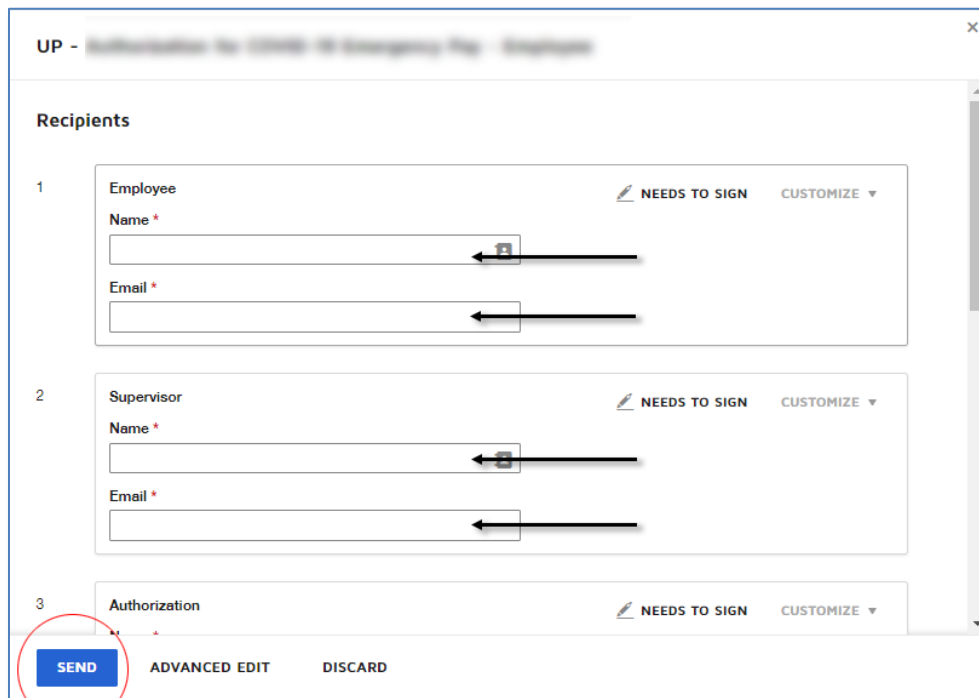


If you see this screen, log out, and log back in with your SJSU email address.

2. Once you gain access to the template, click the blue USE button in the upper left.



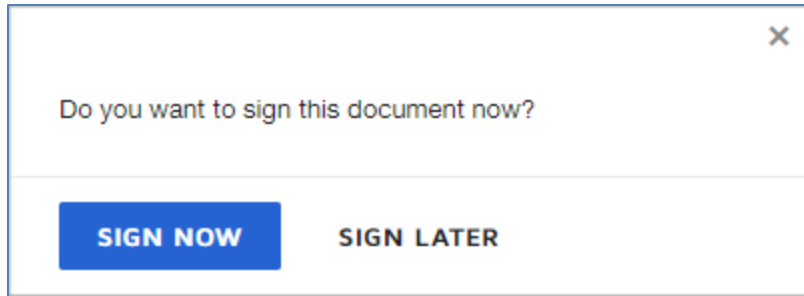
- 3. Enter the Names and Emails for any recipients that are needed.
- 4. Click SEND.



NOTE: Some templates will contain predefined recipients and their Name and Email will not be editable.

The process will now start by sending an email to the first recipient in Recipient List/Signing Order.

If you are the first recipient in the list, basically sending the envelope to yourself, you may be asked if you want to sign now or sign later.



That is up to you. Regardless, you will still get an email in your inbox.

Note: DocuSign names prefaced with "UP" are created and owned by University Personnel. Information contained in this document is specific to UP templates. Templates from other departments may behave differently.

If you questions, please contact the UP Webmaster at up-webmaster@sjsu.edu.