DocuSign Letter Tips for Departments

- If you need access to DocuSign, follow this link: https://medschool.zendesk.com/hc/en-us
- Draft each letter in a Word document utilizing the approved template
- DocuSign TIP: You can use the Outlook Directory or the Employee Directory to accurately identify email addresses for each recipient
  - https://directory.ucdenver.edu/
  - Make sure that you are selecting the correct employees
- Send a DocuSign Envelope
  - Be sure to check “Set the Signing Order” (see image below)
    1. SOM HR inbox (SOM.HR@ucdenver.edu) for initial – SOM HR must be first
    2. DFA for initial
      - Based on department processes, LOO can have others initial off as well (e.g. Division Administrator, Director, HR Administrator etc.).
    3. Division Head/Supervisor
      - Based on department processes, LOOs may include Division Head/Supervisor signature line
    4. Department Chair/Delegate
    5. Dean/Delegate
      - For University Staff – Chris Smith (christopher.2.smith@cuanschutz.edu) signs on behalf of the Dean
      - For Post-docs – Cheryl Welch (cheryl.welch@cuanschutz.edu) signs on behalf of the Dean
    6. Candidate
    7. If desired, you can also add additional people to receive a copy as well. For these, make sure to change the drop down from “Needs to Sign” to “CC Receives A Copy”

![Image of DocuSign Envelope Setup](image-url)
- Add a Message that includes the candidate’s name
  1. e.g. Please review and sign for “candidate”

**Message to All Recipients**

- Custom email and language for each recipient

**Email Subject**

Please DocuSign: Candidate’s name - Effective date

Chars remaining: 50

**Email Message**

Please review and sign letter for “Candidate”

Chars remaining: 9555

- Click “Next”
- To change Initialer/Signer click drop where “DFA” is circled
- Add Initial Fields as needed – Click “Initial” and drag to appropriate area
- Add signature and date fields as needed – Click “Signature” or “Date Signed” and drag to appropriate area

- Double and Triple Check DocuSign for Accuracy!!!
- Submit Envelope
  - Periodically check the status of the letters and any that have been pending with the same signer for more than a few days, resend the envelope as necessary
    1. Log into DocuSign and click “Manage”
    2. On left hand side, click “Waiting on Others”
    3. Click “Resend” on the LOO that is still pending