

Directions for Using DocuSign Non Tenured New Faculty Hiring Packet

* Any faculty member that was previously in a less than 100% position, or research faculty position, is considered a new hire.

- Log in to docuSign (make sure access to the template has been added to your account)
- For questions regarding DocuSign access please contact help@colorado.edu. Please specify you are requesting access to the Office of Faculty Affairs offer letter templates.
- Click on “Templates” at the top of the screen
- Click “Shared with Me” from the list on the left side of the screen

Name	Owner	PowerForms	Last Change	
<input type="checkbox"/> SC-6.0B - Contract Amendment - .01. - Less than \$1 Mil Eligible for matching	christine Adams		2/18/2019 12:14:16 pm	USE ▾
<input type="checkbox"/> CA (SC-5.3) - 03. Greater than \$5 million Eligible for matching	AriAnne Gilliland		2/18/2019 12:12:31 pm	USE ▾
<input type="checkbox"/> CA (SC-5.3) - 02. Between \$1 million and \$5 million Eligible for matching	AriAnne Gilliland		2/18/2019 12:05:28 pm	USE ▾
<input type="checkbox"/> CA (SC-5.3) - 01. Less than \$1 million Eligible for matching	christine Adams		2/18/2019 12:02:04 pm	USE ▾

- Find “Office of Faculty Affairs: Faculty Hiring Packet-Non Tenured” from the list of templates. The owner of the template is Mark Diekhoff. Please make sure you do not download the template from any other owner.

	PowerForms	Created Date	Last Change	Folders
<input type="checkbox"/> ★ Office of Faculty ... Eligible for matching		11/30/2018 11:57:56 am	7/20/2020 02:26:16 pm	USE ▾

- Click the drop down arrow to the right of “use” on the line with the template, then click “create a copy.”

- Edit
- Share to Folders
- Create a Copy
- Download
- Share with Users

- The template will now be saved in the “My Templates” section located on the left side of the screen.
- Click on “My Templates” and find the saved copy of the template.
- Click “Use” on the saved copy of the template.
- The screen will display a list of recipients. Click “Advanced Edit” on the bottom of this pop up.

Office of Faculty Affairs: Faculty Hiring Packet - Non Tenured

Recipients

- Liaison** ✍️ NEEDS TO SIGN MORE ▾

Name *

Email *
- Office of Faculty Affairs** ✍️ NEEDS TO SIGN MORE ▾

Name *

Email *
- Signer One** ✍️ NEEDS TO SIGN MORE ▾

Name *

Email *
- Signer Two** ✍️ NEEDS TO SIGN MORE ▾

Name *

Email *

SEND **ADVANCED EDIT** **DISCARD**

- You will be taken to the “Add Documents to Envelope” screen. This screen shows place holders for all documents that need to be replaced for routing. After OFADocucheck has verified all necessary documents are present and the offer letter is correct, the CV and letter of recommendation will be hidden while the document is routing.
- To replace placeholders with necessary documents, click the three dots on the tile with the placeholder, then select “replace.”

Add Documents to the Envelope

- Select the document to replace the placeholder.
- Complete this process for each of the placeholder documents. The faculty pledge and SSN form have been encoded for the candidate to fill in the correct information based on the responses. Do not replace or change the faculty pledge or SSN page.
- Please ensure the offer letter and employment agreement (if needed) are combined into one document. This combined document will be uploaded as the offer letter.
- After the offer letter has been uploaded, the email subject will auto populate to include the name of the offer letter document.
- After all documents have been added, scroll down to “Add Recipients to the Envelope.”

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

[Import a bulk list.](#) Send copies of this envelope to many people at once. ⓘ

Set signing order

1	<p>Liaison NEEDS TO SIGN MORE</p> <p>Name *</p> <p>Email *</p>
2	<p>Office of Faculty Affairs NEEDS TO SIGN MORE</p> <p>Name *</p> <p>Office of Faculty Affairs</p> <p>Email *</p> <p>ofadocucheck@colorado.edu</p>
3	<p>Signer One NEEDS TO SIGN MORE</p> <p>Name *</p> <p>Email *</p>
4	<p>Signer Two NEEDS TO SIGN MORE</p> <p>Name *</p> <p>Email *</p>

- Add the liaison information. It will first route to the liaison to add candidate information to the ssn form.

- The second recipient defaults to OFADocuccheck. OFADocuccheck will check that the offer letter has any required edits, as well as verify all other necessary documents are present. If the incorrect letter has been uploaded or any of the backup documents are missing from the packet, OFADocuccheck will decline to sign and the hiring packet will need to be re-routed with the correct letter and all necessary documents.
- Add signers in the order that they will be signing the offer letter.
- Remove any signers that are not needed. Place the cursor on the signer box, an x will appear to the right of the box, click the x to remove any additional signers that are not needed.

7

Signer Five ✍️ NEEDS TO SIGN ▼ MORE ▼

Name *

⋮

Email *

- The Vice Provost and Associate Vice Chancellor for Faculty Affairs is built into the signing order, to sign immediately before the candidate. If the Vice Provost and Associate Vice Chancellor signs multiple documents in the same packet (i.e. the offer letter and system agreement) OFADocuccheck should have an initial box for each signature. The first initial box is built in, but additional may need to be added to account for each VPAVC signature.
- Click “Add Recipient” if there is a need for more signatures, or to add someone to receive a completed copy.
- After the signers and recipients have been added, scroll down to “Message to All Recipients”

Message to All Recipients

Custom email and language for each recipient

Email Subject *

Characters remaining: 2

Email Message

Characters remaining: 10000

Advanced Options | [Edit](#)

- Recipients can change signing responsibility
- Recipients must be signers to view signed documents
- Recipients can edit
- Incomplete envelopes expire 30 days after send date
- Recipients are warned 5 day(s) before request expires

- You can either choose to send a custom email to each recipient, or one email to all recipients. Do this by either checking or unchecking the “Custom email and language for each recipient” box.
- Add any message in the “Email Message” box you would like to have shown while the offer letter is routing for signatures.
- Change the email subject line to whatever you would like, but DO NOT change [[Candidate_UserName] This will auto populate the candidate’s name.
- Click “Next” on the bottom right of the screen.

- Add signatures for each signatory on the offer letter at the appropriate signature lines. The Vice Provost and Associate Vice Chancellor will automatically have a signature box on the offer letter. Please move the signature box to the appropriate place for the signature on the offer letter.
- The liaison will not need to sign documents, but will be the “first signature” in order to fill out information on the ssn page. OFA Docucheck has an initial line built in to the first page of the offer letter document.
- After all necessary signatures have been added, click “Send” on the bottom right of the screen.
- The packet will first route to you (the liaison) to enter information on the SSN form. Enter the name of the candidate and hiring department in the appropriate boxes.
- Once the document has routed and the letter packet is complete, no further action is required. Faculty Affairs will receive a completed copy from DocuSign.