Directions for Using Docusign Non Tenured Faculty Reappointment Hiring Packet

- 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

			PowerForms	Created Date	Last Change ▼	Folders	
☐	★	Office of Facult... Eligible for matching	Mark Diekhoff	2/20/2020 11:22:54 am	3/20/2020 03:54:36 pm		USE ▼

(tooltip: Office of Faculty Affairs: Faculty Hiring Packet - Non Tenured Reappointment)

- Find "Office of Faculty Affairs: Faculty Hiring Packet – Non Tenured Reappointment" 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.
- Click the drop down arrow to the right of "use" on the line with the template, then click "create a copy."

		Name	Owner	PowerForms	Created Date	Last Change ▼	Folders	
☐	★	Office of Faculty Affairs: Faculty Hiring Packet -... Eligible for matching	Mark Diekhoff		3/10/2020 10:18:09 am	3/10/2020 11:45:51 am		USE ▼
☐	☆	Honorarium PowerForm Eligible for matching	Monica Martin		7/25/2019 07:45:01 am	3/5/2020 09:10:00 am		Edit Share to Folders Create a Copy Download Share with Users
☐	☆	Honorarium Eligible for matching	Monica Ann Moskovics		12/3/2014 07:50:24 am	3/5/2020 09:07:20 am		
☐	☆	SBP-6.15 - Notice of Award for DBB and DB Lump... Eligible for matching	christine Adams		1/23/2019 09:00:32 am	3/5/2020 07:10:09 am		USE ▼

- 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 Reappointment(3)

Recipients

1   **Office of Faculty Affairs**   ✎ NEEDS TO SIGN   MORE ▾

    Name *

    [OFA]

    Email *

   [ofadocucheck@colorado.edu]

2   **Signer One**   ✎ NEEDS TO SIGN   MORE ▾

    Name *

    [ ]

[**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 OFA Docucheck has verified all necessary documents are present and the offer letter is correct, the CV and PUEC Report/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
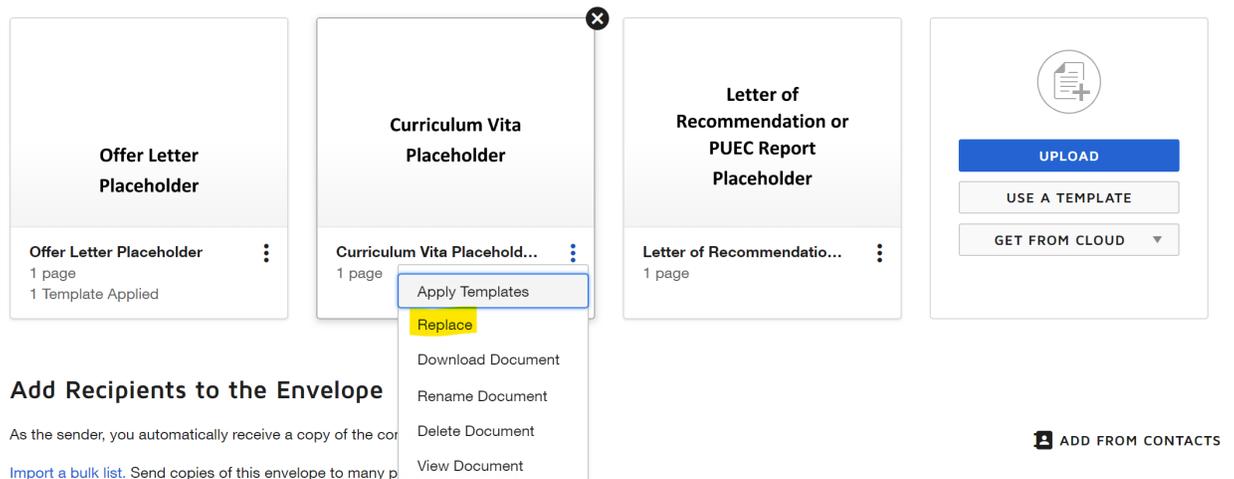
Offer Letter Placeholder	Curriculum Vita Placeholder	Letter of Recommendation or PUEC Report Placeholder	
Offer Letter Placeholder ⋮ 1 page 1 Template Applied	Curriculum Vita Placehold... ⋮ 1 page	Letter of Recommendatio... ⋮ 1 page	UPLOAD USE A TEMPLATE GET FROM CLOUD ▾

Apply Templates
Replace
Download Document
Rename Document
Delete Document
View Document

Add Recipients to the Envelope

As the sender, you automatically receive a copy of the con...

Import a bulk list. Send copies of this envelope to many p...

👤 ADD FROM CONTACTS

- Select the document to replace the placeholder.
- Complete this process for each of the placeholder documents.

- 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."

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. (i)

☑ Set signing order

1	**Office of Faculty Affairs**	✎ NEEDS TO SIGN ▾ MORE ▾
	Name *	
	OFA	
	Email *	
	ofadocucheck@colorado.edu	

2	**Signer One**	✎ NEEDS TO SIGN ▾ MORE ▾
	Name *	
	Email *	

- The first recipient defaults to OFA Docucheck. OFA Docucheck will check that the offer letter has any required edits, as well as verify all other necessary documents are present.
- 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.
- 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"

- 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 for each required signature.
- OFA Docucheck has an initial line built in to the first page of the offer letter document. The OFA Docucheck initial box should be placed near the signature line for the Vice Provost and Associate Vice Chancellor for Faculty Affairs.
- After all necessary signatures have been added, click "Send" on the bottom right of the screen.
- 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.