

This document serves as a resource so that one will be able to send “non-care, custody, control training” or “Standards of Behavior” electronically through DocuSign.

Sender access allows you to send a DocuSign document to someone to receive their electronic signature. **If you do not already have sender access in DocuSign, you must obtain this first by following the steps below. If you have sender access, skip to the next section for DocuSign steps.**

1. Take sender training on www.go.osu.edu/BuckeyeLearn.
 - a. Once logged on, go to Learning/Browse for Training/eSignature Sender.
 - b. Click on the eSignature Sender training and open curriculum player. Follow instructions from there.
2. Accept conditions on www.my.osu.edu to authorize sender training (see [screenshot](#) if help is needed).
 - a. Log-in.
 - b. On left, under home, select eSignature.
3. Email for sender access: access@osu.edu.

DocuSign steps after access is active (individual recipients to be manually entered):

1. Go to www.docusign.net and enter OSU name.#. Click log-in/next, then you will be prompted for OSU password (see [screenshot](#) if help is needed).
2. Click “start a new envelope,” which is located directly under the home tab at the top (see [screenshot](#) if help is needed).
3. You should now be under the “send” tab. Go to the section labeled “documents for signature,” click “choose an online document” (see [screenshot](#) if help is needed).
4. Under “add from your DocuSign library,” choose “shared templates” (see [screenshot](#) if help is needed).
5. Choose appropriate document- either “Activities and Programs with Minor Participants Non-care, custody, control Training” or “Activities and Programs with Minor Participants Standards of Behavior.” Do NOT choose the bulk version of either of these documents.
6. Select document and click add.
7. You should now be under the “send” tab. Go to the section labeled “Recipients and Routing” (see [screenshot](#) if help is needed).
 - a. In line 1 under “order,” enter the email address of the person you want to send the document.
 - b. In line 2 under “order,” enter your email address (or whomever the activity/program director is if that is not you).
 - c. Under the next section, “email message,” review and edit if necessary.
 - d. Review “envelope settings” section and make changes if necessary.
 - e. Click “send now” at bottom of the page.
8. Repeat beginning at step 2 for each new person. If you have more than a handful of people or don’t want to enter everyone individually and would like to do a bulk send, see instructions below.

DocuSign steps after access is active (bulk recipients):

1. Create spreadsheet roster of people that need the document by following these steps in your worksheet (see [screenshot](#) if help is needed):
 - a. Column A: label as “name” and enter all first and last names into column A
 - b. Column B: label as “email” and enter all complete email addresses into column B
 - c. Save as csv (comma delimited) by going to file > save as > select csv (comma delimited) under “save as type”
9. Go to www.docusign.net and enter OSU name.#. Click log-in/next, then you will be prompted for OSU password (see [screenshot](#) if help is needed).
2. Click “start a new envelope,” which is located directly under the home tab at the top (see [screenshot](#) if help is needed).
3. You should now be under the “send” tab. Go to the section labeled “documents for signature,” click “choose an online document” (see [screenshot](#) if help is needed).

4. Under “add from your DocuSign library,” choose “shared templates” (see [screenshot](#) if help is needed).
5. Choose appropriate document- either “Activities and Programs with Minor Participants Non-care, custody, control Training - BULK” or “Activities and Programs with Minor Participants Standards of Behavior – BULK.” It is very important that you choose the “BULK” version of the desired document.
6. Select document and click add.
7. You should now be under the “send” tab. Go to the section labeled “Recipients and Routing” (see [screenshot](#) if help is needed).
 - a. Click “edit bulk recipient.”
 - b. Select roster from where you saved it.
 - c. Verify list is correct.
 - d. Click “close.”
 - e. In line 2 under “order,” enter your email address (or whomever the activity/program director is if that is not you).
 - f. Under the next section, “email message,” review and edit if necessary.
 - g. Review “envelope settings” section and make changes if necessary.
 - h. Click “send now” at bottom of the page.

Notes:

- When the document is signed by the recipient, whomever was entered as the activity or program director will get an email. Follow the steps in email to sign the form as activity or program director.
- All requests/signed forms/etc. will be under the “manage” tab in DocuSign.
- DocuSign should not be used as the storage vehicle for these forms. You will need to download, save, and/or print forms from the completed folder.

my.osu.edu help:

- Home
- Change My Password
- Security Challenge Responses
- My OSU Identity Information
- Change email Delivery
- BuckeyeBox
- eSignature**
- eSignature Author

Welcome to my.osu.edu

Use the left navigation to manage your Ohio State Username account and password.

Please do not use your browser's back button.

Protect your privacy! **Quit the web browser** when you are done accessing services that require authentication!

Resources


- [Get Help](#)
- [University Password Practices](#)
- [Responsible Use Policy](#)
- [Employee Self Service](#)
- [BuckeyeLink](#)
- [System Status Page](#)
- [IT Service Desk Request](#)
- [OSU Wexner Medical Center IT Help Desk](#)

Faculty/Staff on Department and College Networks:

This site does NOT affect your local department/college network logon ID or password. Go to your local IT support group to change your local password.

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Docu-sign log in:




LOG IN

EMAIL

PASSWORD

Next Click next to validate your corporate credentials.

OR LOG IN USING:



Log in to [DocuSign Transaction Rooms](#) (formerly Cartavi)

[Return to instructions](#)

Envelope help:

OHIO STATE UNIVERSITY

Home Manage Send

Start a New Envelope Sign a Document Now

Envelope Status

➔ Awaiting my Signature	0
⌚ Expiring Soon	0
📧 Out For Signature	0
✅ Completed	1

[See All Envelope Statuses »](#)

[Return to instructions](#)

Routing help:

OHIO STATE UNIVERSITY

Home Manage Send Dashboards Reports

Documents for Signature

[Browse from my Computer](#)

- or -

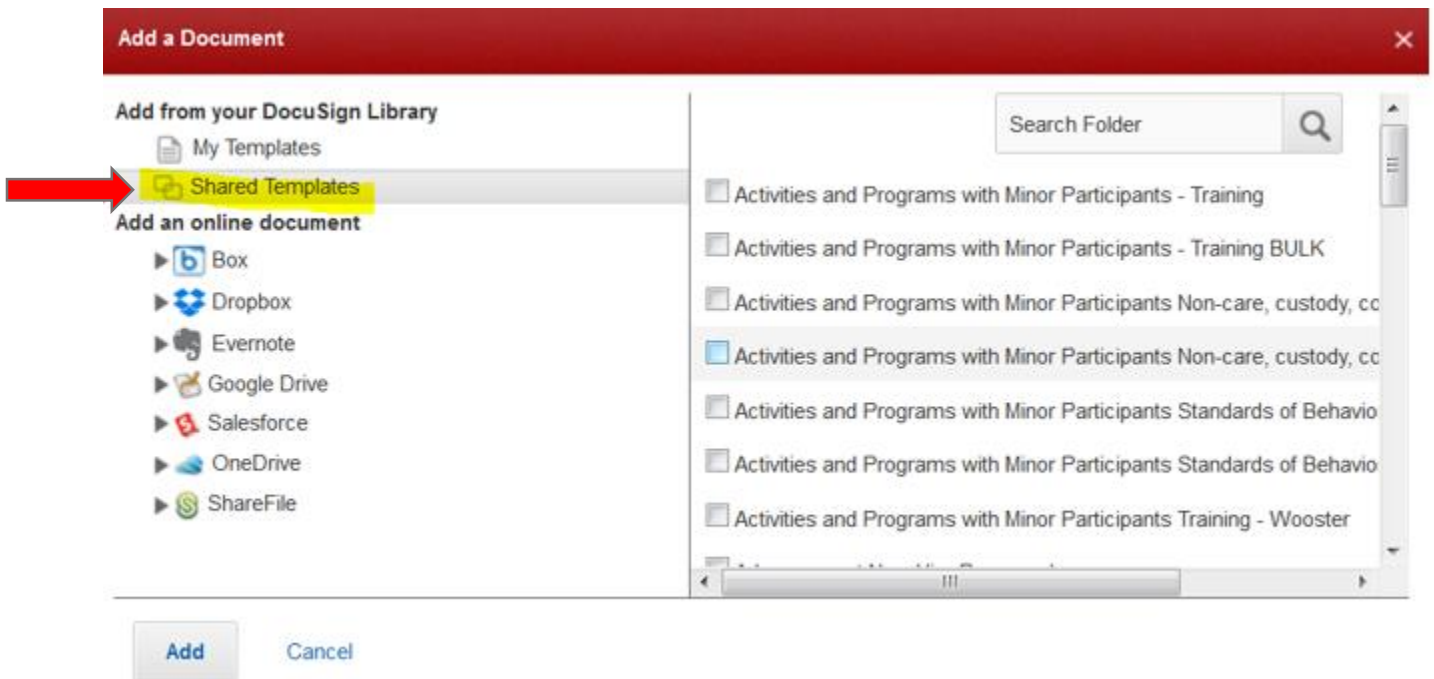
[Choose an Online Document](#)

Select and upload documents from your computer, your template library, or the Internet

- Create or alter the document order by dragging a document or entering a new order number
- Apply a reusable template from your library to save time

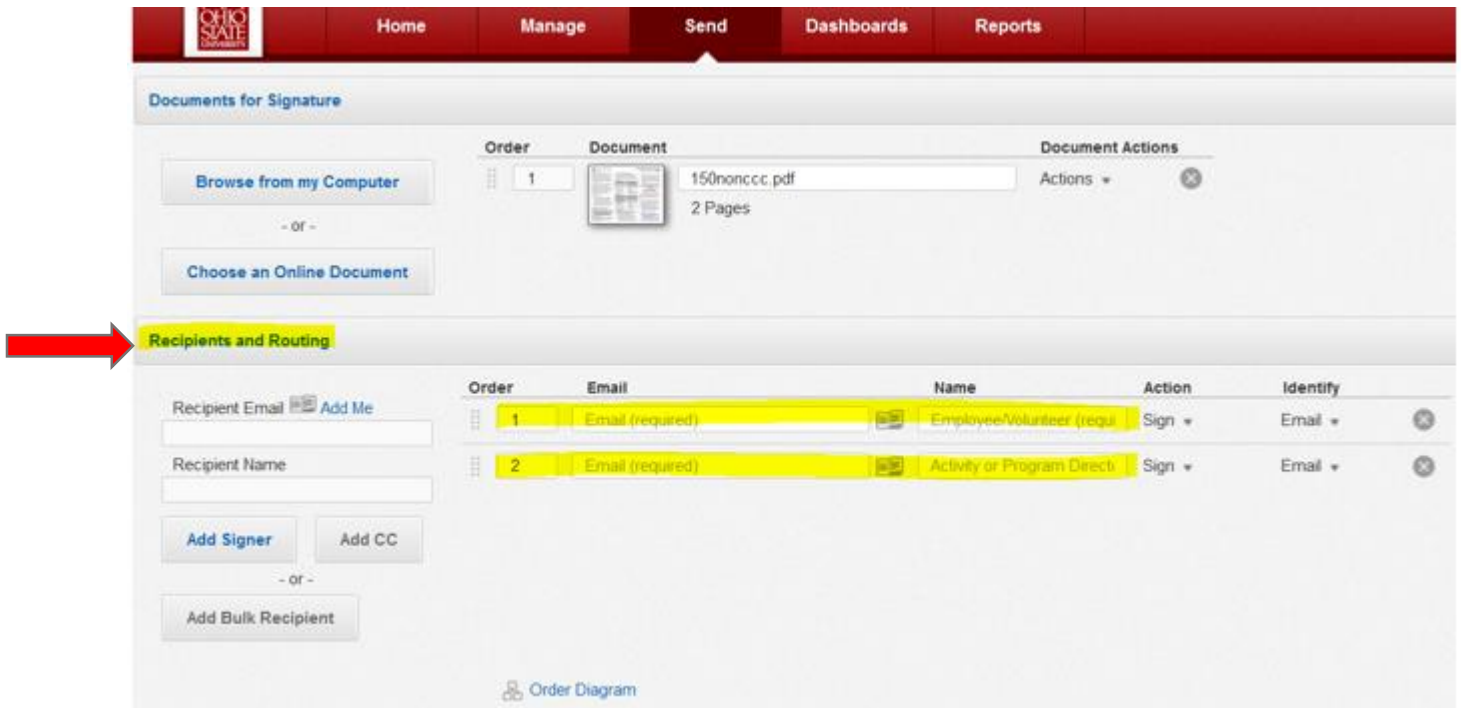
[Return to instructions](#)

Add document help:



[Return to instructions](#)

Recipients, manually add help:



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Recipients, bulk add help:

The screenshot shows the 'Documents for Signature' interface. At the top, there are buttons for 'Browse from my Computer' and 'Choose an Online Document'. Below these, a document '150nonccc.pdf' (2 Pages) is listed. The 'Recipients and Routing' section is highlighted with a red arrow. It contains a table with the following data:

Order	Email	Name	Action	Identify
1	Bulk Recipient	Bulk Recipient	Sign	Email
2	Email (required)	Activity or Program Direct	Sign	Email

Below the table are buttons for 'Add Signer', 'Add CC', and 'Edit Bulk Recipient'. There are also input fields for 'Recipient Email' and 'Recipient Name'.

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Spreadsheet help:

	A	B
1	Name	Email
2	Brutus Buckeye	buckeye.1@osu.edu
3	Ohio State	state.1870@osu.edu
4		

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