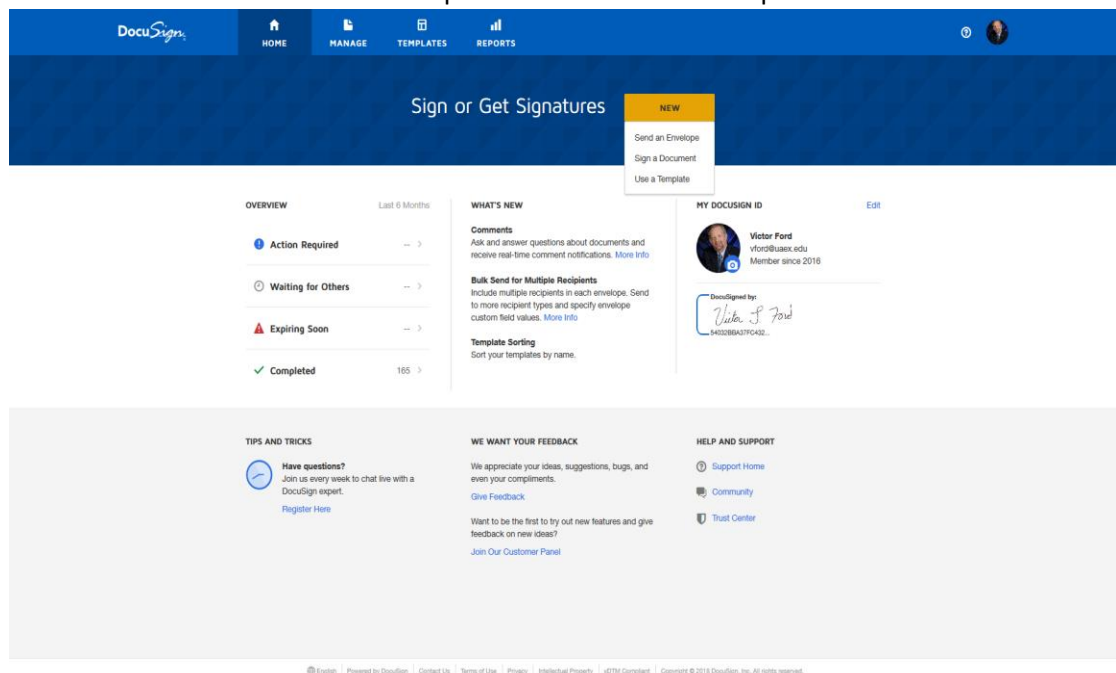


2020 DocuSign Instructions (For Commodity Board Proposal Routing Forms)

2020-2021 Proposals/Awards

1. Extension faculty will use DocuSign and AES faculty will use Adobe Sign.
2. To send documents out using DocuSign you must have access to the program. If you do not have access please email Amy Hedges for a user account.
3. Complete the following before starting DocuSign
 - a. Complete all PI and CO-PI information in the land-use/budget form (this should be the budget that will be submitted with the proposal). Be sure this is the current form with the current fringe benefit rates. Do not use last year's form.
 - b. Proposal document(s).
 - c. Complete the Commodity Board Proposal Routing Form
4. Using DocuSign
 - a. Log into DocuSign
 - b. Click "NEW".
 - c. Click "SEND AN ENVELOPE" at the top of the form from the dropdown menu.



- d. Click “UPLOAD” Folder on the upper left side of the page and select your routing form, proposal, budget, and land use form.

Upload a Document and Add Envelope Recipients

ACTIONS NEXT

Add Documents to the Envelope

UPLOAD
USE A TEMPLATE
GET FROM CLOUD

Add Recipients to the Envelope

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

ADD FROM CONTACTS SIGNING ORDER

☐ Set signing order

Name
Email

NEEDS TO SIGN MORE

ADD RECIPIENT

Message to All Recipients

☐ Custom email and language for each recipient

Please DocuSign:

Enter Message

Advanced Options Edit

- Recipients can sign on paper
- Recipients can change signing responsibility
- Incomplete envelopes expire 120 days after send date
- Recipients are warned 3 day(s) before request expires

- e. DocuSign will find the template **Proposal Routing Form Commodity Board Adobe** and merge the fields when “APPLY” is clicked. You may have other messages but click the X on the upper right side of the box and continue.

Please DocuSign: Proposal Routing Form Commodity Board Adobe SAMPLE.pdf

ACTIONS NEXT

Add Documents to the Envelope

Proposal Routing Form Commodity Board Adobe SAMPLE.pdf

1 page

GET FROM CLOUD

Add Recipients to the Envelope

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

ADD FROM CONTACTS SIGNING ORDER

☐ Set signing order

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Enter Message

Advanced Options Edit

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Select Matching Templates

We found form fields for Proposal Routing Form Commodity Board Adobe SAMPLE.pdf.

Select the matching template

Proposal Routing Form Commodity Board Adobe SAMPLE.pdf

☒ Proposal Routing Form for Promotion Board Matching: 100% Pages: 1-1

APPLY CANCEL

- f. Enter the name and email address of PI’s, Department Heads, and Station Directors.

- g. Check for open signatories and remove them by moving the cursor to the right site of the boxes without entries, click the “X”, and confirm deletion. **THIS STEP IS CRUCIAL.**

The screenshot shows the DocuSign interface for a 'Proposal Routing Form for Commodity Check-Off Funds'. The top navigation bar includes a back arrow, the document title, an 'ACTIONS' dropdown, and a 'NEXT' button.

Add Documents to the Envelope

On the left, a preview of the 'Proposal Routing Form Commo...' is shown with '1 page' and '1 Template Applied'. On the right, there are three buttons: 'UPLOAD' (highlighted in blue), 'USE A TEMPLATE', and 'GET FROM CLOUD'.

Add Recipients to the Envelope

Below this section, a note states: 'Some of the recipients are locked and cannot be changed [Learn More...](#)'. To the right are links for 'ADD FROM CONTACTS' and 'SIGNING ORDER'. A sub-note says: 'As the sender, you automatically receive a copy of the completed envelope.' A checkbox for 'Set signing order' is checked.

Three recipient slots are listed:

- 1 Principal Investigator**: Fields for Name and Email. A 'NEEDS TO SIGN' status and a 'MORE' dropdown are to the right.
- 2 Co-PI 1**: Fields for Name and Email. A 'NEEDS TO SIGN' status and a 'MORE' dropdown are to the right.
- 2 Co-PI 2**: Field for Name. A 'NEEDS TO SIGN' status and a 'MORE' dropdown are to the right.

- h. Click “NEXT”.

- i. On the box at the center of the page click “Keep PDF form data”.

The screenshot shows the 'Manage PDF form field data' dialog box overlaid on a proposal form. The dialog box has a title bar with a close 'X' button. Inside, it asks 'What would you like to do?' with three radio button options: 'Merge data with template fields' (selected), 'Keep PDF form data', and 'Delete data'. Below these is an 'Assign to:' dropdown menu with the text '— Select Recipient —'. A 'CONFIRM' button is at the bottom of the dialog.

The background form is the 'Proposal Routing Form for Commodity Check-Off Funds' from the University of Arkansas System. It includes fields for PI Name, Co-PI Name, and Co-PI Name, each followed by a list of commodity checkboxes: Beef Council, Corn/Grain Sorghum, Cotton, Rice, Soybean, and Wheat. A text area for 'Proposal Title' contains the text: 'My proposal is the best proposal in the whole wide world. It's going to solve all of our rice, soybean and cotton problems and we will grow the most crops of any state in the country.'

At the bottom of the form, there is a section titled 'All investigators have read and understood UA's conflict of interest policies...' followed by a paragraph about the proposal's compliance with federal standards and a final paragraph about the PI and co-PIs' responsibilities.

The top navigation bar of the DocuSign interface is visible, showing the document title, 'ACTIONS' dropdown, and a 'SEND' button.

- j. Click “SEND” at the top and right of the screen.

- k. You and those that were identified on the document will receive an email from DocuSign to attach a signature to the document.
- l. At this point, you may continue submitting proposals or leave DocuSign.