

# GUIDE DOCUSIGN



## Contents

<b>USER GUIDELINES FOR SIGNING WITH DOCUSIGN .....</b>	<b>2</b>
Receiving an email notification .....	2
Opening documents.....	2
Checking and signing documents.....	2
<b>Other Actions .....</b>	<b>4</b>
Finish Later .....	4
Assign to Someone Else.....	4
Decline to Sign.....	5
Specify Recipients .....	6

### USER GUIDELINES FOR SIGNING WITH DOCUSIGN

These guidelines explain how to use the DocuSign service to sign documents electronically. All the relevant background information on DocuSign and e-signing at CHG-MERIDIAN can be found at:

[www.docusign.com](http://www.docusign.com) and [www.chg-meridian.com/tools/DocuSign.html](http://www.chg-meridian.com/tools/DocuSign.html)

**Please note:** Contracts that are signed electronically using DocuSign should always be saved on your local drive or local contract management system together with the respective DocuSign completion certificate.

#### Receiving an email notification

For you, as customers of CHG-MERIDIAN, the electronic signing process starts when you receive an email asking you to sign a document using an electronic signature. This email is sent by DocuSign (DocuSign EU system sender address: **dse@eumail.docusign.net**) on behalf of CHG-MERIDIAN. You will receive a message from the sender as well as a link that allows you to open an electronic envelope containing a document. Click on the link to access the document.

#### Opening documents

After opening the email, click on **Review Document** to access the document. This opens a new browser window and establishes a connection with the secure website of the DocuSign e-signing platform.

Please first agree to using electronic records and signatures by selecting the appropriate checkbox.



#### Checking and signing documents

To first of all review the document, click the  button.

You will immediately see which fields apply to you. Please complete these fields with the required information. For instance, the field requiring a signature looks like this:



**For information:** Please note that fields such as name and date are automatically completed by DocuSign.

When you use DocuSign for the first time, you will be asked for your signature information as soon as you click **sign**. Check whether your name and initials are correctly displayed. Make any necessary corrections. You have four options for adopting a signature:

- Click **Adopt and Sign** to accept the standard signature and suggested initials and proceed to the next step.
- Click **Change Style** to select one of the other pre-formatted fonts from DocuSign.
- Click **Draw** to draw your signature/initials on the touchscreen with your mouse or your finger.
- You also have the option of **Uploading** a scanned signature or a photograph of your signature.

**Please note:** For an electronic signature, it is not important how your signature looks and it can therefore be completely different from your actual signature. It is the mouse click that confirms your agreement with the content of the document.

### Adopt Your Signature ✕

Confirm your name, initials, and signature.

\* Required

**Full Name\***

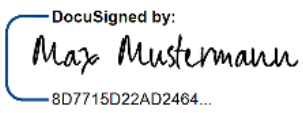
**Initials\***

**SELECT STYLE**    DRAW    UPLOAD

---

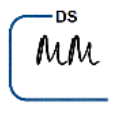
**PREVIEW** [Change Style](#)

DocuSigned by:



8D7715D22AD2464...


DS



By selecting Adopt and Sign, I agree that the signature and initials will be the electronic representation of my signature and initials for all purposes when I (or my agent) use them on documents, including legally binding contracts - just the same as a pen-and-paper signature or initial.

**ADOPT AND SIGN**

CANCEL

By clicking **Adopt and Sign**, you confirm the style you have selected for your signature and this is inserted into the document. Once you have added all the required information, e.g. your title, click on the  button in the top right-hand corner.

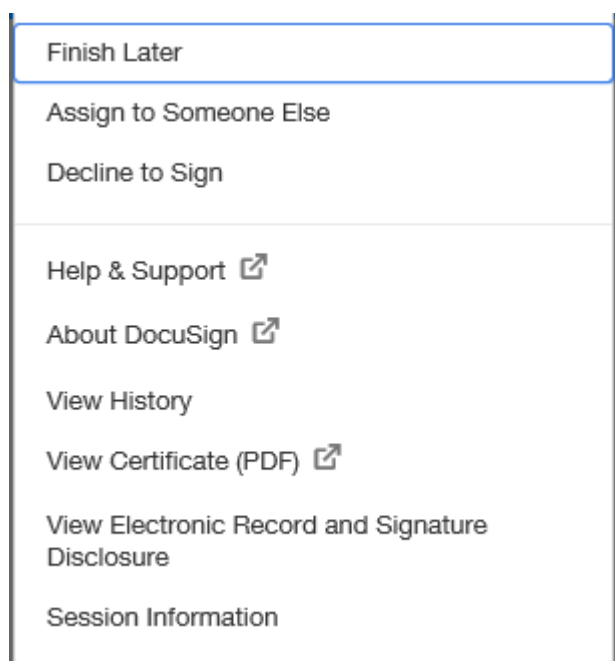
**Please note:** This button will irreversibly insert your electronic signature, complete the signature process, and forward the envelope to the next signer.

After that, a pop-up window will appear, inviting you to sign up for a free DocuSign account and save your settings. On the next screen, DocuSign will notify you that the process has been completed.

Once all parties have signed the document, you will receive a confirmation email. Attached to this email are a copy of the signed documents in PDF format and the certificate of completion showing a summary of signing events. This will happen regardless of whether you have set up a DocuSign account or not.

### Other Actions

Once you have opened the document, you can perform other actions by clicking the **Other Actions** button in the top right-hand corner of the screen:



### Finish Later

This option allows you to sign the document at a later time if required. You can return to the document at any time by clicking the link in the email notification. If you have an account, you can also view your envelopes on the DocuSign dashboard.

### Assign to Someone Else

This option can be used to send the document to another person for signing. Click **Assign to Someone Else**. This opens a pop-up window. Enter the name and email address of the new signer as well as a message to the person who created the envelope, giving a reason for the change.

### Assign to Someone Else ✕

\* Required

Email Address for the New Signer \*

New Signer's Name \*

Please provide a reason for changing signing responsibility

250 characters remaining

Selecting the Assign to Someone Else button will send a notification to the person to whom you assigned this envelope. The original sender will also receive a notification. You will be added as a Carbon Copy (CC) recipient.

**ASSIGN TO SOMEONE ELSE**      CANCEL

The change of signer is confirmed in a new window and you will be added as a cc recipient for the envelope. Click **Close**.

The person you named as the new signer will be notified by email that you have assigned the envelope to him/her.

The person who created the envelope will also receive an email notification about the change of signer.

The person whom you assigned will sign the document as described above. When all parties have signed the document, you will also receive a copy.

**Please note:** If the document should be signed by someone else, use the option available in DocuSign. Click the **Assign to Someone Else** button under **Other Actions**. Do not forward your email notification to others or give anyone else access to your inbox to sign the contract. This could result in another person signing a document using your details, without this being apparent from the contract or the certificate of completion.

### Decline to Sign

Using this option, you can make the document invalid and inaccessible to other signers.

**Please note:** We would strongly advise that you contact the sender before declining the document or declaring it invalid. This would result in the entire transaction being closed and the envelope being rendered invalid. The envelope must then be resent to all participants, which would delay the process.

If you click **Decline to Sign**, a pop-up window opens.

### Caution

If you choose to continue, this document will be void and inaccessible to other signers.

To request changes to this document, please select **FINISH LATER** and contact the sender directly with your request.

**CONTINUE**    **FINISH LATER**    **CANCEL**

If you still want to decline the document despite having contacted your representative at CHG-MERIDIAN, click **Continue**. Select **Finish Later** to request changes or click **Cancel** to return to the document.

If you still wish to decline the document, you will be asked to give a reason. To do this, click **Decline to Sign**.

### Decline to Sign

Please provide a reason for declining:

500 characters remaining

**DECLINE TO SIGN**    **CANCEL**

### Specify Recipients

If you are required to **Specify Recipients**, you will see this in the email notification, which will ask you to complete the information about the recipients.

Please review and complete the recipient information.

**REVIEW DOCUMENT**

You will see the following input screen:

**You have been asked to review and add recipient information.**  
Please enter the email address and name for the associated role and select 'Complete and Send'.

<b>Role</b> Head of Innovation Management	<b>Email</b> <input type="text"/>	<b>Name</b> <input type="text"/>	<a href="#">Edit Private Message</a>
---	--------------------------------------	-------------------------------------	--------------------------------------

**COMPLETE AND SEND**      [Show Document](#)

You will generally be sent this task if the sender of the document is not certain of the names of the people who are authorized to sign. Please assist the sender by adding information to the process. You will need to fill in a valid email address and the full first and last names of the authorized signers in this process. The details in the 'first name and last name' field are used to automatically create a signature template.

The **Complete and Send** button forwards the process to the signer or signers who were added to the process.