



Using DocuSign Templates for New Hire/Rehire Paperwork

(Updated 12/7/2022)

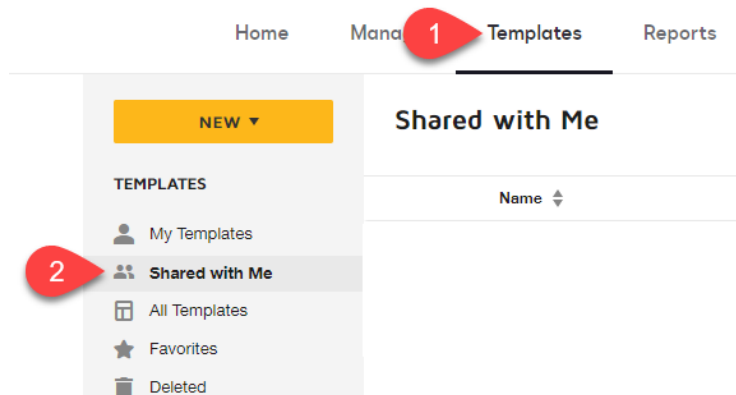
BEFORE USING SHARED TEMPLATES

Payroll-approved DocuSign paperwork templates have been shared with each Business Center Manager on campus. At the discretion of the Business Center Manager, they may further share the templates with HR staff.

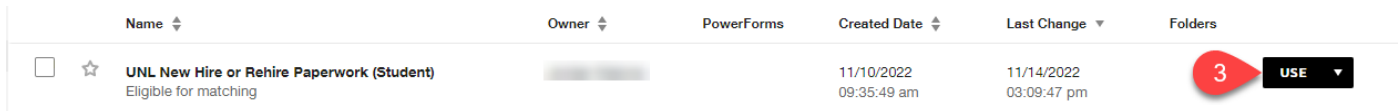
In order to use the templates for new hire or rehire paperwork, authorized HR staff must first obtain a no-cost DocuSign sending license from NU ITS (<https://services.unl.edu/service/docusign-e-signature-workflow-service>).

ACCESS AND USE A SHARED TEMPLATE

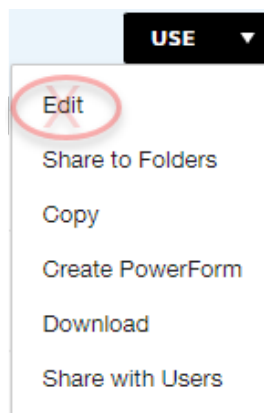
1. Access templates that have been shared with you by clicking **TEMPLATES** on the ribbon.
2. Click on **SHARED WITH ME** on the left-hand side of the screen.



3. Click the **USE** button next to the template that you would like to use.



IMPORTANT: If you click the triangle on the **USE** button, never select **EDIT** from the drop-down menu unless you are the owner of the shared template.



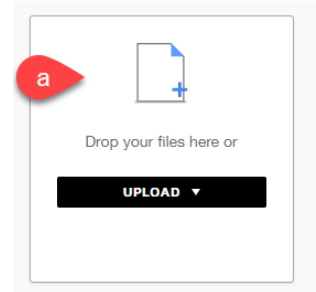


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4. Enter the **NAME** (first and last) and **EMAIL ADDRESS** of the new or rehired employee.
 5. Enter the **NAME** and **EMAIL ADDRESS** of the department contact who will be processing the new hire paperwork.
- Note: No other recipients may be added due to the Voluntary Self Identification of a Disability form within the template and HIPPA laws.*
6. *Optional.* Edit the **EMAIL SUBJECT** and include a customized **EMAIL MESSAGE**.
 7. *Optional.* To add any additional documents or forms that may be required for a department, click on **ADVANCED EDIT**.

- a. Drag and drop each additional document on the tile labeled **DROP YOUR FILES HERE** or click on **UPLOAD**, then **BROWSE** to search and select files from computer. *Please ensure the documents stay in the required order.*
- b. Click **NEXT** in the bottom right-hand corner and assign fields for the recipient(s); click and drag a field from the **FIELDS** menu and place it on the document. *See step-by-step instructions under [ASSIGN FIELDS FOR A RECIPIENT](#) within this document.*



8. When ready, click **SEND** in the bottom right-hand corner. The envelope will be sent to the employee and the department contact at the same time to complete their assigned fields on the documents. Once both parties have done so, they will each receive the final, completed copy via email from DocuSign.

The screenshot shows the DocuSign envelope configuration interface. It includes two recipient sections: 'Employee' and 'Preparer or HR Coordinator'. Each section has 'Name' and 'Email' fields. Below these are options to 'Add envelope custom fields' and 'Add message'. The 'Add message' section includes a checkbox for 'Custom email and language for each recipient', an 'Email Subject' field (with a callout '6'), and an 'Email Message' text area. At the bottom right, there are 'ADVANCED EDIT' and 'SEND' buttons, with callouts '7' and '8' respectively.



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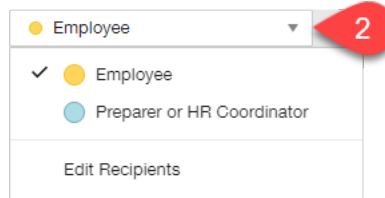
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ASSIGN FIELDS FOR A RECIPIENT

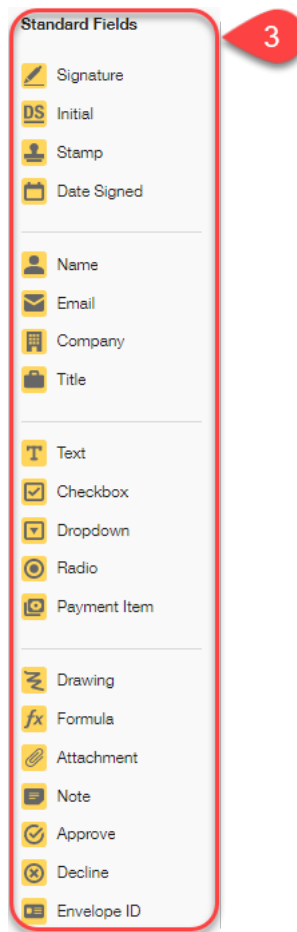
The following step-by-step instructions are for item **7.b.** under [ACCESS AND USE A SHARED TEMPLATE](#) within this document.

1. Scroll through the envelope documents until you see the added document that needs fields added.
2. In the recipients list at the top right-hand corner of the page, select a person to add fields for completing.

Note: The fields you add apply only to the selected recipient and are color-coded to match the recipient's color.



3. Click and drag a field from the **STANDARD FIELDS** menu and place it on the document





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4. *Optional.* To adjust the look, the assigned recipient, or other characteristics of a field, click on the field you added to the document and a **FIELD PROPERTIES** panel will slide over the page guide on the right side of your screen. Some common field property actions are listed below.

Note: The fields within the New Hire/Rehire Paperwork templates are restricted from being changed or deleted. Users of these templates will only be able to add fields to the current documents or any documents that have been added.

- a. Drop down menu to change assigned recipient of field
- b. Check or uncheck box to make field required or not required
- c. Click to open the field's **FORMATTING PROPERTIES**. *The example shown is the font formatting used throughout the New Hire/Rehire Paperwork templates.*

Formatting

Calibri

10

B *I* U

Bright Blue

Hide text with asterisks

Fixed Width

Text

Recipient

Employee

Required Field

Read Only

Rules

OPEN RULES

Add Text

4000 Character Limit

Formatting

Data Label

Tooltip

Validation

Location

Collaboration

Conditional Fields

SAVE AS CUSTOM FIELD

DELETE



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MANAGE SENT ENVELOPES

1. Access envelopes that you have sent by clicking **MANAGE** on the ribbon.
2. Click on **SENT** on the left-hand side of the screen.
 - a. *Optional.* Hover your mouse over **WAITING FOR OTHERS** in the Status column on an incomplete envelope and a pop-up window will appear showing who still needs to complete their required fields.
 - b. *Optional.* Click the **RESEND** button on an incomplete envelope to resend the DocuSign notification email to all signers who have not completed their required fields.

Note: The New Hire/Rehire Paperwork templates are set up to automatically resend the envelope every 3 days to signers who have not completed their required fields.

- c. *Optional.* Click the triangle on the **RESEND** button for additional options.

The screenshot displays the DocuSign interface for managing sent envelopes. At the top, the 'Manage' tab is selected, indicated by a red callout '1'. The left sidebar shows the 'Sent' folder selected, indicated by a red callout '2'. The main area shows a table of envelopes with columns for Subject, Status, and Last Change. One envelope is highlighted with a status of 'Waiting for Others', indicated by a red callout 'a'. A pop-up window shows the details of the 'WAITING FOR' status, including the date and time sent. The 'RESEND' button is visible, and its dropdown menu is open, showing options like Move, Correct, Copy, Save as Template, Void, History, Form Data, Export as CSV, and Delete, indicated by a red callout 'b' and 'c'.



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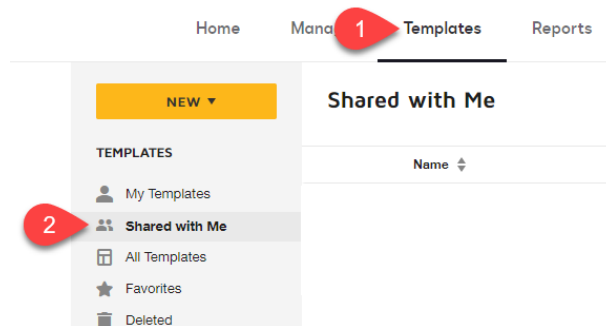
(Updated 12/7/2022)

CREATE A COPY OF A SHARED TEMPLATE

For departments who have additional documents or forms required of employees and do not wish to add them each time they use the template, they may create a **COPY** of the shared template and use it as a starting point for a new template that better meets their department needs.

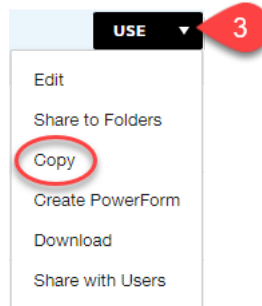
Note: When changes are made to the original template by the template's owner, copies of the template do not retain these changes.

1. Access templates that have been shared with you by clicking **TEMPLATES** on the ribbon.
2. Click on **SHARED WITH ME** on the left-hand side of the screen.

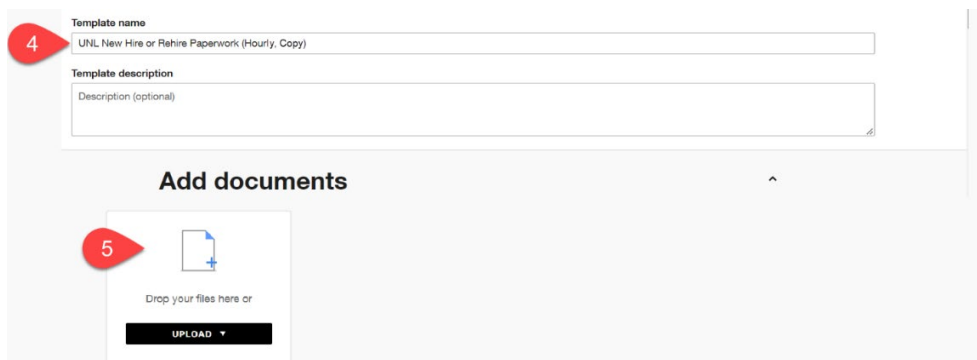


3. Click the triangle on the **USE** button and select **COPY** from the drop-down menu next to the template of which you would like to make a copy. A copy of the template will open in edit mode.

IMPORTANT: Never select **EDIT** from the drop-down menu unless you are the owner of the shared template.



4. *Optional.* Edit the template name.
5. Drag and drop each additional document on the tile labeled **DROP YOUR FILES HERE** or click on **UPLOAD**, then **BROWSE** to search and select files from computer. *Please ensure the documents stay in the required order.*





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6. Click **NEXT**.
7. Assign fields for the recipient(s); click and drag a field from the **FIELDS** menu and place it on the document. See *step-by-step instructions under [ASSIGN FIELDS FOR A RECIPIENT](#)* within this document.
8. Click **SAVE AND CLOSE**.
9. *Optional.* To share a template with other users, locate your template under *Templates > My Templates* and click the triangle on the **USE** button and select **SHARE WITH USERS** from the drop-down menu.

The screenshot shows a table of templates. The first row is highlighted and contains the following information:

<input type="checkbox"/>	<input type="checkbox"/>	UNL New Hire or Rehire Paperwork (Hourly, Copy) Eligible for matching		11/18/2022 01:18:38 pm	11/20/2022 06:30:10 pm	USE
						<ul style="list-style-type: none">EditMoveShare to FoldersCopyCreate PowerFormInclude in MatchingExclude from MatchingDeleteDownloadShare with Users

A red circle with the number '9' is placed over the 'Share with Users' option in the dropdown menu.