

Using DocuSign Templates for I-9s

BEFORE USING SHARED TEMPLATES

Payroll-approved DocuSign I-9 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, authorized HR staff must first obtain a no-cost DocuSign sending license from NU ITS (<u>https://services.unl.edu/service/docusign-e-signature-workflow-service</u>).

NOTE: Due to the sensitive nature of the information being collected and to ensure compliance with the electronic completion of the I-9, the template is locked and cannot be edited, nor can additional signers be added to the routing.

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 UNL- Form I-9 template.





Payroll Services

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- (Updated 8/22/2023) 4. Enter the NAME (first and last) and EMAIL ADDRESS of the individual needing to complete the I-9.
- 5. Enter the NAME and EMAIL ADDRESS of the authorized UNL Human Resources professional who will complete the remote document verification and employer section of the I-9.

NOTE: This field must be an individual's name and email address and cannot be a shared/department name and/or email address.

6. When ready, click **SEND** in the bottom right-hand corner. The envelope (document) will be sent to the employee, and after they complete their assigned fields, it will be sent to the department contact to complete theirs. After the envelope is complete, each individual will receive the final, completed envelope via email from DocuSign.

	Employee	_	NEEDS TO SIGN 🔻	CUSTOMIZE 🔻		
1	Name *				R	
	HR Representative	_	NEEDS TO SIGN V	CUSTOMIZE 🔻		
2 5	Email *					
					6 SEND	•





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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 I-9 template is 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.

Ho 1 M	anage T	emplates Reports				0
SHARED ACCESS ¥ Sent				Q Search Sent and Folders		
NEW T	Filtered by: [Date (Last 6 Months) Edit				
		Subject	Status		Last Change 🔻	С
		Please DocuSign: New Employee Paperwork To:	a Waiting for Others	0/2 done	11/16/2022 03:46:27 pm	RESEND
🛛 Sent 📃 2						Move
🕞 Drafts			WAITING FOR			Correct
Deleted	• Sent on 11/16/2022 03:46:			27 pm	Сору	
E Bulk Send				27 pm		Save as Template Void
PowerForms						History
QUICK VIEWS						Form Data
Action Required						Export as CSV
Waiting for Others						Delete

