SENDING A HIGH RISK DOCUMENT TO THIRD PARTIES

Step 1: Upload your document

From the Main page, click NEW and select Send an Envelope.

Click UPLOAD to upload a document from your computer. Locate the document you want to upload and click Open. Alternatively, you may click USE A TEMPLATE to use an existing template.

Step 2: Add the recipient(s)

In the RECIPIENTS section, enter the recipient’s name and email address. To add additional individuals who are part of the routing, click ADD RECIPIENT and specify their signing action.

If you are sending a high risk document, click MORE and select Add access authentication to enter a unique access code for each recipient. You will share this access code with the individual by phone or text, not email.
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Step 3: Add the email subject and message

DocuSign automatically adds an email subject when you upload a document. You can customize this subject and add a message to the recipient by filling in the MESSAGE fields. When finished click NEXT.

Step 4: Add signing fields

You can begin adding fields on the document with the tips below. To assign a signature or other field for the recipient, click and drag a field from the Fields Palette and place it on the document.

Step 5: Preview and send your document

Review your document, then click SEND to initiate the envelope.