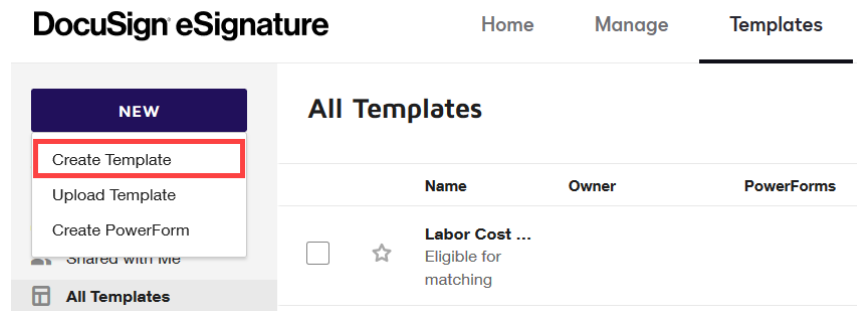


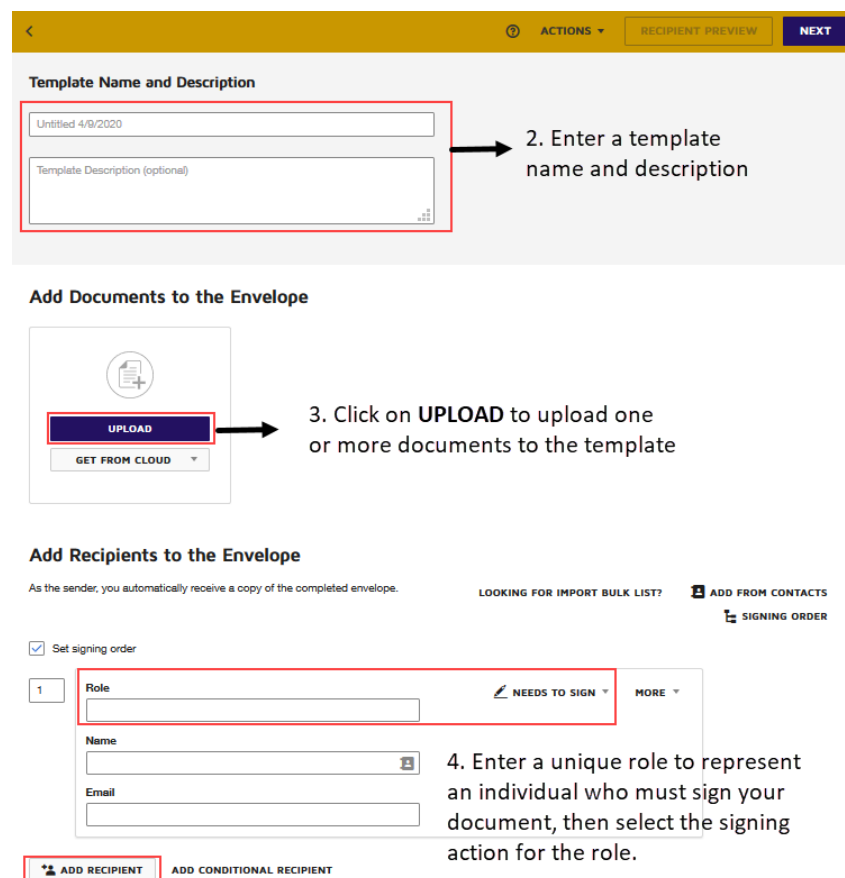
CREATING A TEMPLATE IN DOCUSIGN

Part 1: Setting up the routing

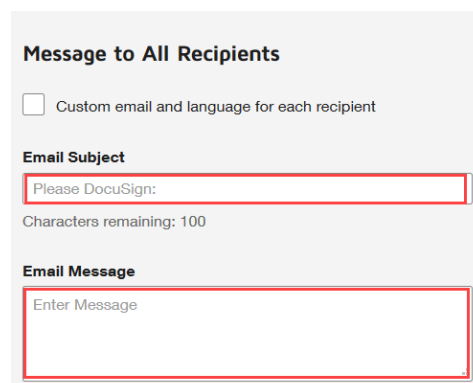
1. From the Templates page, click **NEW** and select **Create Template**.



The prepare view appears where you can add files, recipient roles, and messaging



2. Enter a name and description for your template.
3. Click on **UPLOAD** to upload one or more files to the template.
4. Begin adding recipient roles.
 - a. Enter a unique role to represent each individual who must sign your document. Example: Requestor, Reviewer, Approver.
 - b. Select the signing action for the recipient role.
 - c. To add additional recipient roles, click **ADD RECIPIENT** and repeat steps a-b.



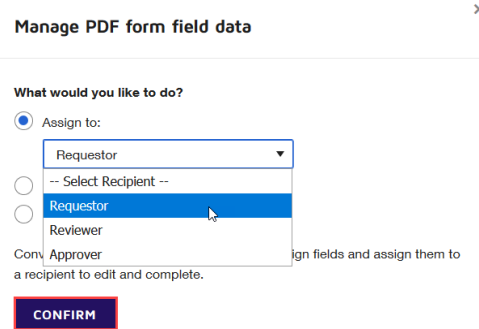
5. Customize the Email Subject and add an Email Message for your template.



6. Click **ADVANCED OPTIONS** on the top right to:
 - a. Set Reminder and Expiration schedules
 - b. Create a password to protect your template from being modified
7. Click on **NEXT** to begin adding fields to your document.

Part 2: Setting up Form Fields

1. If your form is already a fillable PDF, DocuSign will recognize the form fields so that you can assign them to a recipient.



Manage PDF form field data

What would you like to do?

Assign to:

Requestor

-- Select Recipient --

Requestor

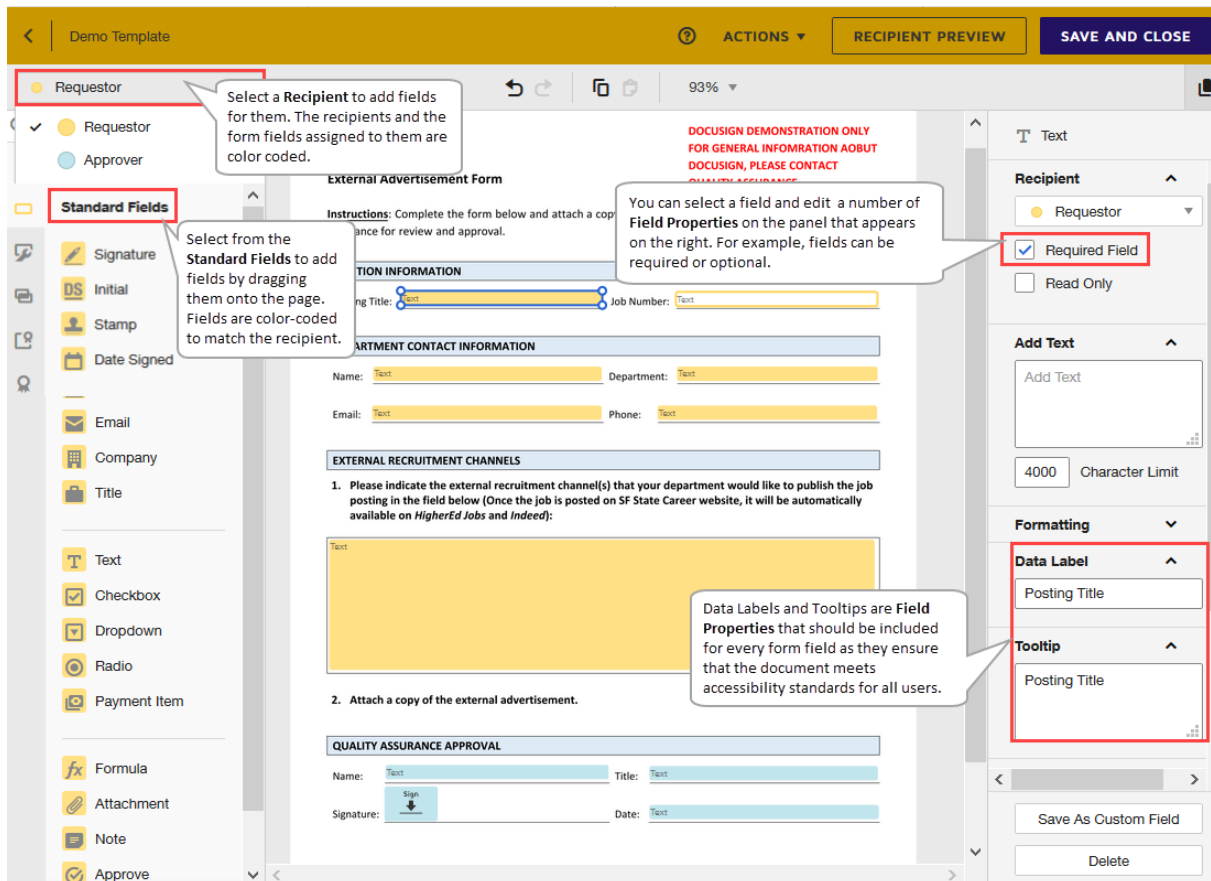
Reviewer

Approver

CONFIRM

If you do not have a fillable PDF, you will have to add the form fields to the document manually.

2. You can begin adding and editing form fields on the document with the tips below.



Recipients. Lists all of the recipients who will receive your documents to sign. The fields you add apply only to the selected recipient and are color-coded to match the recipient's assigned color.

Standard Fields. Displays the set of standard fields you can add to your document. Below are some common standard fields:

Signature – Allows recipients to enter their DocuSign signature on the form with a single click.

Date Signed – The field will automatically populate the timestamp as to when the form was signed by the recipient.

Email – This field automatically populates with the recipient's email address.

Text – Allows recipients to enter text into the field. If you are not working with a fillable PDF, you will have to drag and drop Text fields for every field on your form.

Checkbox – This is a square box for recipients to select one or more options. You can add a single box or a group of multiple boxes. A checkbox group can include a validation rule to enforce how many checkboxes in the group your signer must select.

Radio Buttons – Radio buttons provide options from which recipients can select only one response. Radio buttons are placed as a group, and you can add, remove, or position the individual buttons.

Attachment – The Attachment field allows you to request additional documentation from a recipient. The recipient is asked to upload the documentation. The attachment is added to the final document and can be downloaded or printed.

Field Properties. When you add fields to your documents, you can set a variety of properties. Click on a single field to select it, and the field properties panel will appear on the right-hand side to reveal the settings you can adjust.

Required Field – Specifies whether the field is required or optional.

Add Text – For text fields, you can enter the field contents to present to recipients. Apply the Read Only property if you want to protect your entry. Set a Character Limit to control how many characters recipients can enter into the field.

Formatting - Defines the font family, size, and color, and character styling.

Data Label – Contains field identifiers. **Data Labels and Tooltips should be included for every form as a best practice suggested by DPRC to ensure the document meets accessibility standards for all users.**

Tooltips – Provides use tips that appear when the recipient mouses over the field.

Validation – For text fields, restrict the type of data signers can enter such as just Numbers, Email, Letters, or Date.

Conditional Logic - Set up, review, and edit conditional relationships between fields.