

DocuSign Instructions

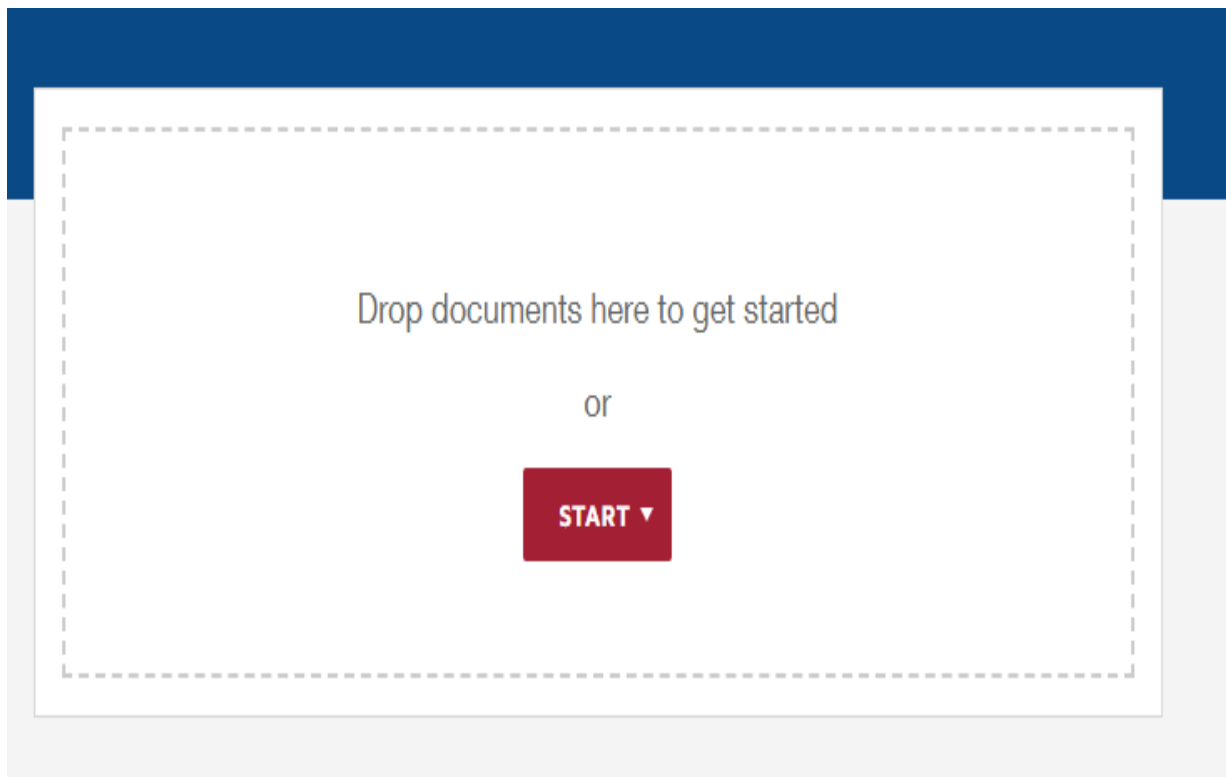
Employees and/or their manager should complete the OVC FlexWork Form and name the completed form with this naming convention: “Office name_ Employee first initial last name_ month year”.

Either the employee or the manager will upload the completed FlexWork form to DocuSign for signatures by the employee, manager and office head (or designee such as AO or HR contact).

As the initiator:

Go to: <http://docusign.mit.edu> (log in using your email and Touchstone)

You should see this screen:



Upload your flexwork form saved with this naming convention: “Office name_ Employee first initial last name_ month year”.

Once your form is uploaded, you’ll be taken to the page to “Add Recipients to the Envelope.” Please enter the names and email addresses of all who need to sign the form and add Y-Chie Primo (yprimo@mit.edu) as a CC: Receives a Copy.

The image shows a vertical list of four recipient cards in a document signing interface. Each card contains the following information:

- Name ***: EMPLOYEE, MANAGER, OFFICE HEAD, Y-Chie Primo
- Email ***: Employee@mit.edu, Manager@mit.edu, officehead@mit.edu, yprimo@mit.edu
- Status**: NEEDS TO SIGN (for the first three), CC RECEIVES A COPY (for the last one)
- Actions**: A 'CUSTOMIZE' dropdown menu is present on each card.

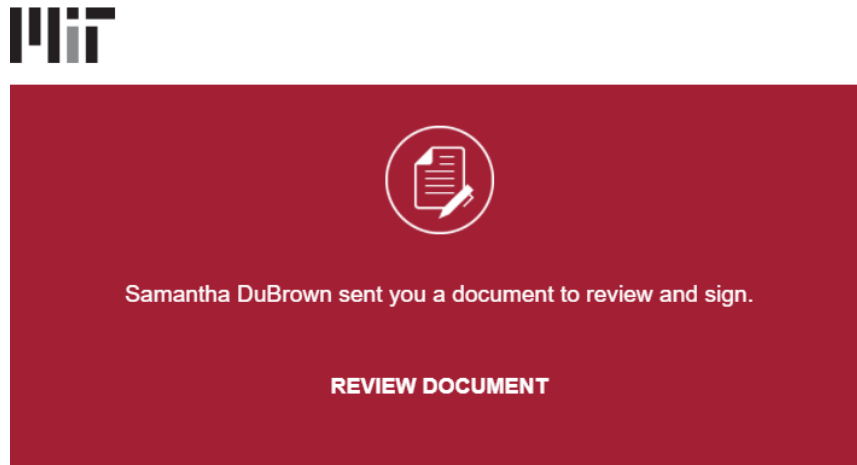
Add your name as Sender Name and edit your message to recipients (if you would like)

Click “send now”

**As the initiator and required signer, you will have the option to sign now before it is sent out

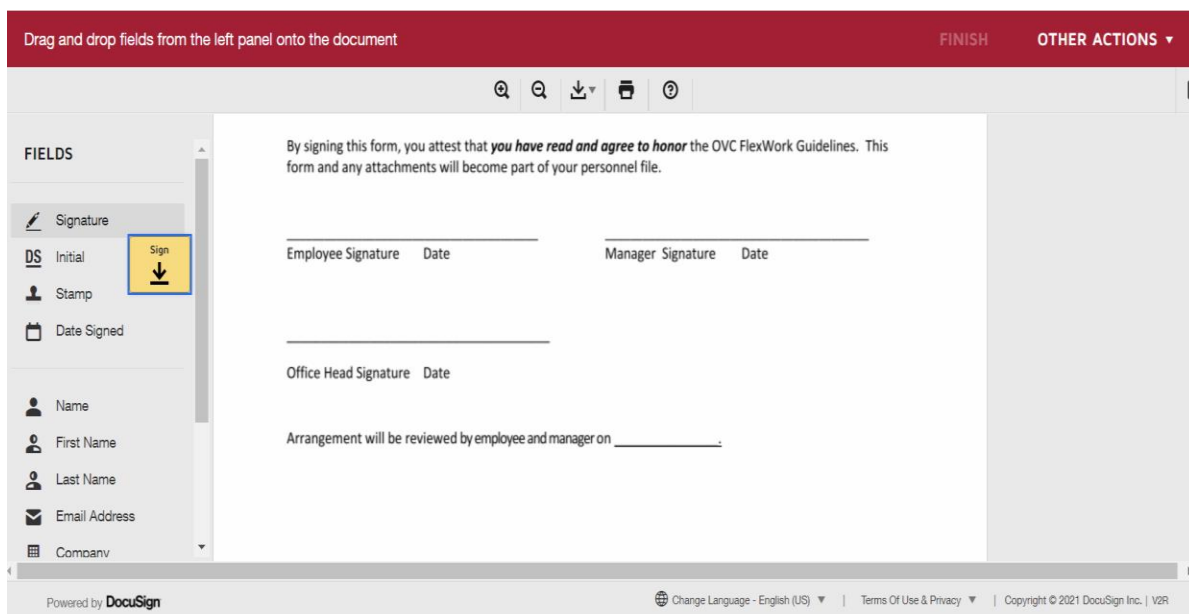
As a receiver:

You will receive a notification similar to the one below:



Click on “Review Document” and the DocuSign should open up in a new window.

- 1) Please review the Electronic Record and Signature Disclosure and check off that you agree. Hit “continue”
- 2) Scroll down and review the form.
- 3) Once you’re ready to sign, click on the Signature field on the left of the screen to drag and drop your signature to the appropriate line.



- 4) Once you drop it on the signature line, a box will pop up asking you to “Adopt Your Signature”

- 5) Choose your signature style and hit “Adopt and Sign”

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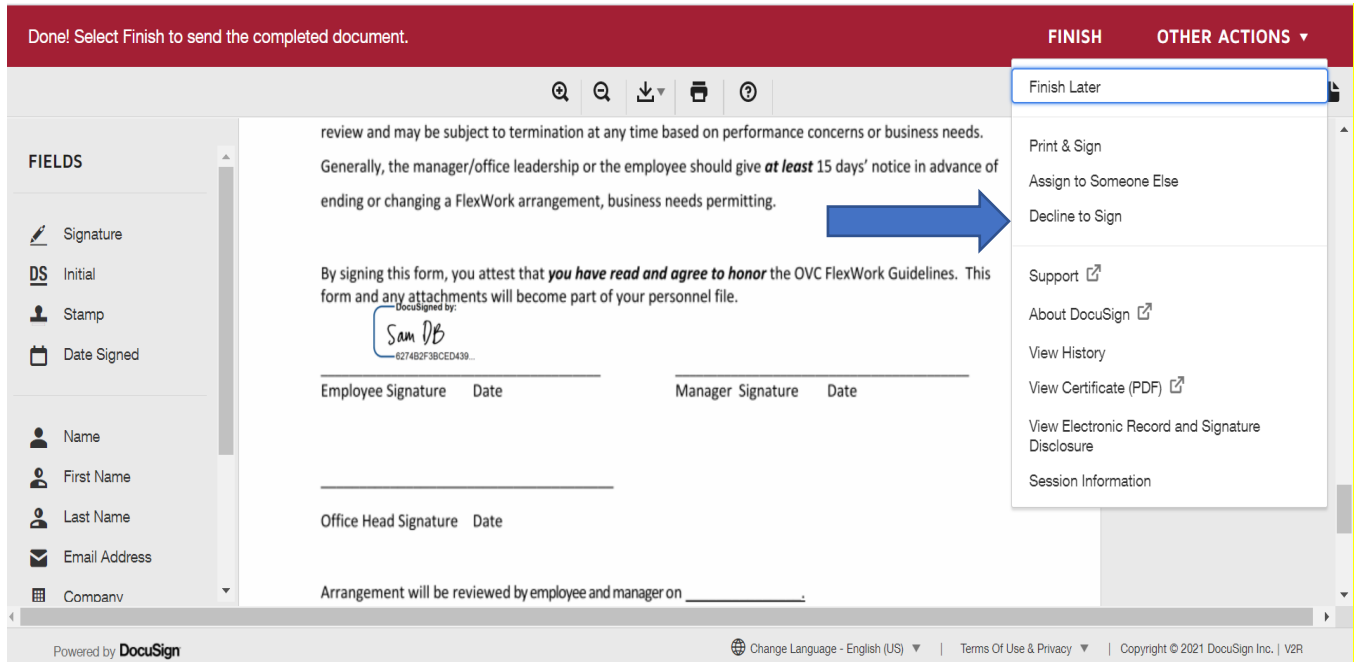
- 6) To add the date, click and drop “Date Signed”

7/23/2021 | 11:15:39 AM EDT | 6274B2F3BCED439

- 7) Hit “Finish” at the bottom of the page
- 8) You can either download or print your form for your records.
 - a. If you choose to download separate PDFs, you will receive a copy of the form plus a Summary (certificate of completion)

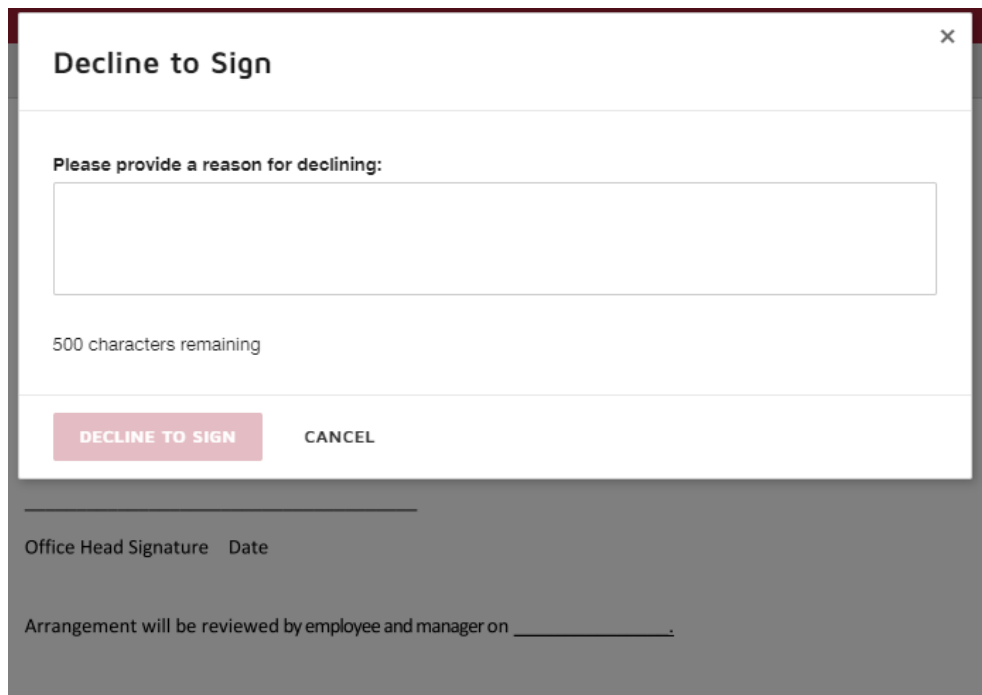
As a receiver who does not wish to sign (further changes needed):

Go to “Other Actions” > Decline to Sign



The screenshot shows the DocuSign interface with a document ready for review. The top bar indicates "Done! Select Finish to send the completed document." and has buttons for "FINISH" and "OTHER ACTIONS". The "OTHER ACTIONS" dropdown menu is open, showing options like "Finish Later", "Print & Sign", "Assign to Someone Else", and "Decline to Sign". A blue arrow points to the "Decline to Sign" option. The document content includes a warning about termination, a notice of 15 days' advance notice, and a signature field for the employee. The footer shows "Powered by DocuSign" and "Change Language - English (US)".

You will be asked to provide a reason for declining:



The dialog box is titled "Decline to Sign" and contains a text input field for providing a reason for declining. Below the input field, it says "500 characters remaining". At the bottom of the dialog, there are two buttons: "DECLINE TO SIGN" and "CANCEL". The background of the dialog shows the same document content as the previous screenshot, including the signature field and the review date.

Hit “Decline to Sign” and the form initiator will receive an email notification with your reason for declining.