

# ASA - DocuSign

## CIRES IT

*How to get your ASA documents uploaded to DocuSign and digitally signed.*



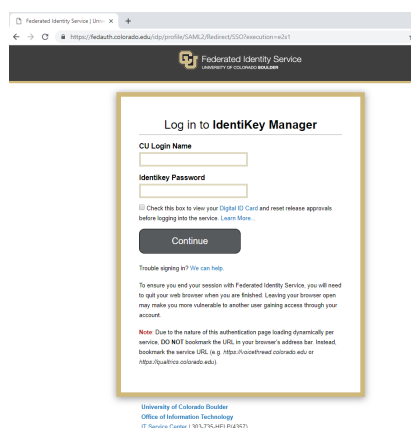
**Please be sure to add signatures on both the merit sheet and supervisor assessment.**

### Step 1

Browse to <https://insidecires.colorado.edu/asa> and download the document you would like to get added to DocuSign (ex. Supervisor Assessment).

### Step 2

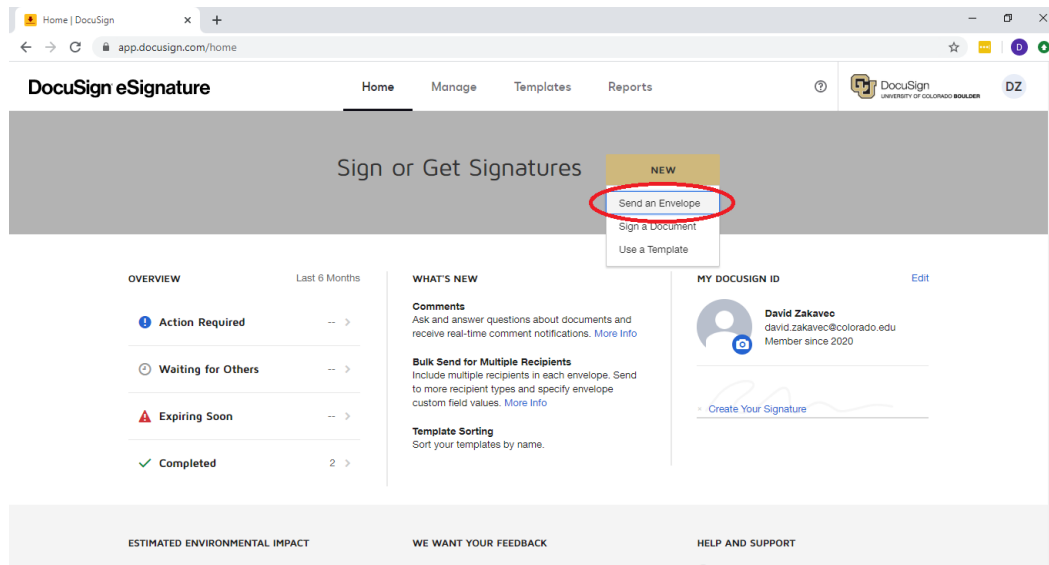
Browse to <http://docusign.colorado.edu/> and login with your IdentiKey and IdentiKey password



The screenshot shows a web browser window with the URL <https://docusign.colorado.edu/>. The page title is "Federated Identity Service" and the header includes the "Federated Identity Service" logo and "UNIVERSITY OF COLORADO BOULDER". The main content area is titled "Log in to IdentiKey Manager" and contains a login form with fields for "CU Login Name" and "IdentiKey Password". Below the password field is a checkbox labeled "Check this box to show your Digital ID Card and need release approvals before logging into the service. Learn More." and a "Continue" button. A note at the bottom states: "To ensure you end your session with Federated Identity Service, you will need to quit your web browser when you are finished. Leaving your browser open may make you more vulnerable to another user gaining access through your account." A footer note reads: "Note: Due to the nature of this authentication page loading dynamically per service, DO NOT bookmark the URL in your browser's address bar. Instead, bookmark the service URL, in g. <https://docusign.colorado.edu/> or <https://insidecires.colorado.edu/>". The footer also includes "University of Colorado Boulder", "Office of Information Technology", and "IT Service Center | 303.735.HELP (4357)".

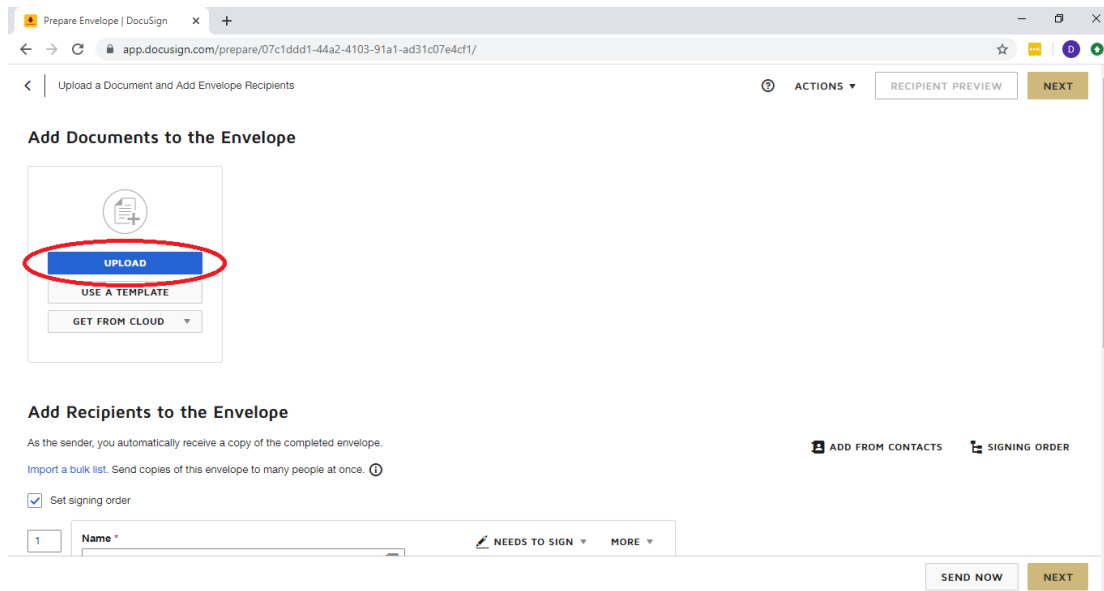
### Step 3

Once logged in click the "New" button and click "Send an Envelope"



## Step 4

Click the Upload button and browse to where you saved the ASA document that you need signed. Select the document and click open.



## Step 4

You will see a small preview of the document that you just uploaded. Now it's time to add the recipients that will need to sign the document (this includes yourself). Scroll down to the "Add Recipients to the Envelope" section.

Prepare Envelope | DocuSign

app.docusign.com/prepare/d9654961-b367-4993-acdd-edc6e4b382db/

Upload a Document and Add Envelope Recipients

### Add Recipients to the Envelope

As the sender, you automatically receive a copy of the completed envelope.

[Import a bulk list.](#) Send copies of this envelope to many people at once.

☒ Set signing order

**1**  NEEDS TO SIGN MORE

**ADD RECIPIENT**

**Message to All Recipients**

☐ Custom email and language for each recipient

**Email Subject**

**Advanced Options** | [Edit](#)

- Recipients can change signing responsibility
- Incomplete envelopes expire 30 days after send date
- Recipients are warned 5 day(s) before request expires
- Senders can use either quick send or advanced edit

**SEND NOW** **NEXT**

## Step 5

Enter your name and email in the first recipient box. Then click the Add Recipient button.

Prepare Envelope | DocuSign

app.docusign.com/prepare/d9654961-b367-4993-acdd-edc6e4b382db/

Upload a Document and Add Envelope Recipients

### Add Recipients to the Envelope

As the sender, you automatically receive a copy of the completed envelope.

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**1**  NEEDS TO SIGN MORE

**ADD RECIPIENT**

**Message to All Recipients**

☐ Custom email and language for each recipient

**Email Subject**

**Advanced Options** | [Edit](#)

- Recipients can change signing responsibility
- Incomplete envelopes expire 30 days after send date
- Recipients are warned 5 day(s) before request expires
- Senders can use either quick send or advanced edit

**SEND NOW** **NEXT**

## Step 6

Enter the name of your employee and their email address. Click the Add Recipient button.

Prepare Envelope | DocuSign

app.docusign.com/prepare/d9654961-b367-4993-acdd-edc6e4b382db/

Upload a Document and Add Envelope Recipients

**Add Recipients to the Envelope**

As the sender, you automatically receive a copy of the completed envelope.  
[Import a bulk list.](#) Send copies of this envelope to many people at once.

☒ Set signing order

1

Name \*  
Supervisor Name

Email \*  
supervisor@colorado.edu

NEEDS TO SIGN MORE

2

Name \*  
Employee Name

Email \*  
employee@colorado.edu

NEEDS TO SIGN MORE

ADD RECIPIENT

SEND NOW NEXT

## Step 7

Enter CIRES HR for the Name of the last recipient and enter [ciresasa@colorado.edu](mailto:ciresasa@colorado.edu) for the email. Click on the down arrow next to “Needs to sign” and select – Receives a Copy

Prepare Envelope | DocuSign

app.docusign.com/prepare/2a5725c4-6d99-49b9-b5a3-c32101a4a996/

Upload a Document and Add Envelope Recipients

**Add Recipients to the Envelope**

1

Name \*  
Supervisor Name

Email \*  
supervisor@colorado.edu

NEEDS TO SIGN MORE

2

Name \*  
Employee Name

Email \*  
employee@colorado.edu

NEEDS TO SIGN MORE

3

Name \*  
CIRES ASA

Email \*  
ciresasa@colorado.edu

NEEDS TO SIGN MORE

- Needs to Sign
- In Person Signer
- CC: Receives a Copy
- Needs to View
- Specify Recipients
- Allow to Edit

ADD RECIPIENT

SEND NOW NEXT

## Step 8

Scroll down and make any adjustments to the message that the recipient will receive. Click Next when done.

Prepare Envelope | DocuSign

app.docusign.com/prepare/2a5725c4-6d99-49b9-b5a3-c32101a4a996/

ASA Signature

Email \*

ciresasa@colorado.edu

ADD RECIPIENT

Message to All Recipients

☐ Custom email and language for each recipient

Email Subject\*

ASA Signature

Characters remaining: 87

Email Message

Please review and sign your ASA Assessment

Characters remaining: 9957

Advanced Options | Edit

- Recipients can change signing responsibility
- Incomplete envelopes expire 30 days after send date
- Recipients are warned 5 day(s) before request expires
- Senders can use either quick send or advanced edit

SEND NOW NEXT

## Step 9

Scroll down to where your signature needs to be. Make sure your name is selected in the dropdown in the top left. Click the signature icon and drag it to the signature line. Click where you want to place it.

Add Fields | Envelope | DocuSign

app.docusign.com/prepare/efbc519a-1eb9-4085-8325-03ce9848318d/add-fields

ASA Signature

Supervisor Name

Standard Fields

- Signature
- Initial
- Date Signed
- Name
- Email
- Company
- Title
- Text
- Checkbox
- Dropdown
- Radio

Signatures

Supervisor and employee must sign. Both signatures are Required.

Employee: \_\_\_\_\_ Date: \_\_\_\_\_

Supervisor: \_\_\_\_\_ Date: \_\_\_\_\_

The signature indicates only that the rating has been discussed with the person rated and does not necessarily imply consent. The person rated is to receive a copy of the signed form.

BACK SEND

## Step 10

Click the Date Signed icon and drag it to the date line. Click where you want to place it.

ASA Signature

Supervisor Name

Search Fields

Standard Fields

- Signature
- Initial
- Date Signed**
- Name
- Email
- Company
- Title
- Text
- Checkbox
- Dropdown
- Radio

Far Exceeds Expectations

Exceeds Normal Expectations

X Meets Normal Expectations

Below Expectations

Unsatisfactory/Failed to Meet Expectations

**Signatures**

Supervisor and employee must sign. Both signatures are Required.

Employee: \_\_\_\_\_ Date: \_\_\_\_\_

Supervisor: \_\_\_\_\_ Date: **Date Signed**

The signature indicates only that the rating has been discussed with the person rated and does not necessarily imply consent. The person rated is to receive a copy of the signed form.

Documents

Example\_ASA\_Sup...  
Pages: 2

1

BACK SEND

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SHORTCUTS | FEEDBACK

## Step 11

Repeat steps 9 and 10 for the employee signature, make sure to change the drop down to the employee's name.

ASA Signature

Employee Name

Search Fields

Standard Fields

- Signature
- Initial
- Date Signed
- Name
- Email
- Company
- Title
- Text
- Checkbox
- Dropdown
- Radio

Far Exceeds Expectations

Exceeds Normal Expectations

X Meets Normal Expectations

Below Expectations

Unsatisfactory/Failed to Meet Expectations

**Signatures**

Supervisor and employee must sign. Both signatures are Required.

Employee: \_\_\_\_\_ Date: **Date Signed**

Supervisor: \_\_\_\_\_ Date: **Date Signed**

The signature indicates only that the rating has been discussed with the person rated and does not necessarily imply consent. The person rated is to receive a copy of the signed form.

Documents

Example\_ASA\_Sup...  
Pages: 2

1

BACK SEND

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SHORTCUTS | FEEDBACK

## Step 12

Click the Send button.

## Step 12

Since your name is the first recipient a pop up should show up that asks if you want to sign the document now, click Sign Now. If you don't see this, you will be brought back to where you can Manage your sent documents. Click on the Sign button next to the one you just created.

## Step 13

Follow the DocuSign prompts to sign the document. Once you are done, an email will automatically be sent to your employee notifying them that they need to sign the document. After they've signed the document you'll receive an email from DocuSign letting you know the document has been completed. It includes a link to the signed document. The CIRES ASA team will also receive a copy of this email. Please email [ciresithelp@colorado.edu](mailto:ciresithelp@colorado.edu) if you have any trouble or questions about the process.

# Need Additional Help?

Please contact CIRES IT with any question or comments you may have.

Email: [ciresithelp@colorado.edu](mailto:ciresithelp@colorado.edu)

Phone: 303-735-4200

Main Office: CIRES 216

