

## Using the ISU Research Participant DocuSign Forms or the ISU Property Receipt DocuSign Forms

- 1) Log into Okta and determine if you currently have access to DocuSign.
  - If you currently have access to DocuSign it will appear as an Okta tile.
  - If you do not have DocuSign as an Okta tile you will need to request DocuSign.
    - 1) Visit : [https://iastate.servicenow.com/it?id=kb\\_article&sys\\_id=acb885b31b0d1c5093ecfff7dc4bcb35](https://iastate.servicenow.com/it?id=kb_article&sys_id=acb885b31b0d1c5093ecfff7dc4bcb35)
      - After clicking on the link above, the Information Technology Services page should open and your name should appear in the upper right corner.
      - If your name does not appear in the upper right corner of the page, click on the word LOGIN. This will take you to a Service Now screen and log you in. Once you've logged in you can click on the link above again and your name should appear in the upper right corner.
    - 2) Click on the link on the right side of the page that reads Request a DocuSign License.
    - 3) When the next page opens, enter your net-id in the box and click order now.
    - 4) Click the checkout button on the order confirmation screen.
    - 5) This will open a Service Now Ticket with your request and IT will add the Okta tile to your dashboard.

Home > IT Service Catalog > Software > Request a DocuSign License

Request a DocuSign License  
Electronic signatures for digital documents and workflows.

DocuSign is an electronic signature platform that can be used to electronically sign documents, forms, or agreements, replacing paper-based processes. Signing a document requires only an email address. To send things out to be signed, or to create online forms for others to sign and submit, a license is required.


- Send unlimited items for signing
- Create templates that can be easily reused
- Create online forms that allow others to sign and submit without your first sending a document

Net-ID of User(s)

Start typing in the text field below to search by full name or Net-ID. Select the name from the list of results and continue searching if additional users are needed.

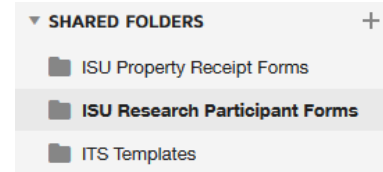
Add to Cart

Order Now

- 2) Click on  from your Okta Dashboard.
- 3) Once in DocuSign, click on the templates tab located at the top of the page.

**DocuSign eSignature**      Home      Manage      Templates      Reports

- 4) In the left column of the Templates tab, click on the triangle next to Shared Folders to reveal a drop down that includes the folders containing the ISU Research Participant Docusign Forms and the ISU Property Receipt Docusign Forms.



- 5) Each of these folders contain individual forms that can be used for:
- Any dollar amount less than \$100.
  - Any dollar amount that is \$100 or more.
  - A \$5, \$10, \$15, \$20, \$25, or \$50 gift card.
- 6) Select the form you would like to use and click use.
- When using either the less than \$100 form **OR** the > or = \$100 form:
    - 1) You will need to enter:
      - The name and email of the individual who will be entering the type and amount of compensation (this may be you) AND
      - The name and email of the individual who needs to sign the form.
    - 2) Click Send.
    - 3) Docusign will send the form to the individual who will be entering the type and amount of compensation.
    - 4) Once that individual has completed their portion of the form, Docusign will route it to the individual who needs to electronically sign the form.
    - 5) After the form has been electronically signed Docusign will send an email to the original sender with a link to the completed document and where a PDF of the completed form can be printed or downloaded.
  - When using a form with a designated gift card amount:
    - 1) You will only need to enter the name and email of the individual who needs to sign the form and then click send.
    - 2) Docusign will send the form to the individual who needs to electronically sign the form.
    - 3) After the form has been electronically signed Docusign will send an email to the original sender with a link to the completed document and where a PDF of the completed form can be printed or downloaded.
- 7) Use the Manage tab to review the forms you have sent and to track the status of those forms.
- All of the sent forms can be found by clicking sent from the menu on the left.
  - Once the form status is Completed you will be able to access the signed form, to download or print the PDF, from the Manage tab.

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