

# DocuSign Procedures

## Request a DocuSign Account

If you are interested in a DocuSign Account, please fill out the new user request form: <https://na3.docusign.net/Member/PowerFormSigning.aspx?PowerFormId=d311d27f-add9-4d50-a538-551ca3749fa5&env=na3-eu1&acct=78a17721-b77c-458a-82bc-a64b04e64482>.

*If your Department has a Document Unit Coordinator (aka. DUC), contact that person to establish a new account.*

## User Permission Profiles

Viewer: Can view only.

Sender: Can send forms and documents to signers.

Super user: Can send and forms and documents, as well as create templates and powerforms.

1. Go to [docusign.com](https://docusign.com).
2. Enter your SLU email address and your DocuSign password.
3. You will be directed to your DocuSign account home page.

DocuSign Sandbox Test Site: <https://account-d.docusign.com/#/username>

## Training Resources

Visit the DocuSign training site on Blackboard Learn, located in mySLU tools, for more information.

Common topics:

- [Sign a Document with DocuSign](#) (Video)
- [Correcting an In-Flight Document](#) (Video)
- [DocuSign Support Documentation](#)
- [Document Retention and Purging Envelopes](#)
- [Sending Documents](#) (Video)
- [More Videos](#)

## Templates

Templates can be created by users who are granted permission by the DocuSign Organizational admin with approval from a DocuSign Unit Coordinator (DUC).

## PowerForms

Templates can be turned into PowerForms by Power Users and DUCs. PowerForms can be posted online, allowing any user to initiate the document.

## Troubleshooting

DocuSign Support: <https://support.docusign.com/home>

## DocuSign Unit Coordinators

DocuSign Org Admin: Katy Wittwer, Business Services, [katy.wittwer@health.slu.edu](mailto:katy.wittwer@health.slu.edu)

Development: Vicki Casey

Office of the Registrar: Jay Haugen