DocuSign Procedures

Request a DocuSign Account
- If your Department already has a Document Unit Coordinator (aka. DUC), contact that person to discussing requesting a new account.
- Otherwise, submit a new user request form to get started.

User Profiles
- Viewer: Can view only.
- Sender: Can send forms and documents to signers.
- Superuser: Can send and forms and documents, as well as create templates and powerforms.
- Signers: Can sign or fill out documents sent to them. Note: signers do not need an account.

Access DocuSign
- Go to docusign.com.
- Enter your SLU email address and your DocuSign password.
- 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 site on Blackboard Learn, located in mySLU tools, for training materials.
- For tips and troubleshooting, contact DocuSign Support: https://support.docusign.com/home

Common training topics
- Sign a Document with DocuSign
- Correcting an In-Flight Document
- Sending Documents in DocuSign
- DocuSign Support Documentation
- Password Resets
- More Videos

Templates and Powerforms
Templates can be created by users who are granted permission by the DocuSign Organizational admin with approval from a DocuSign Unit Coordinator (DUC). Templates can be turned into PowerForms by Superusers and DUCs. PowerForms can be posted online, allowing any user to initiate the document.

DocuSign Unit Coordinators
- Katy Wittwer (Org Admin), Business Services
- Vicki Casey, Development Services
- Jay Haugen, Office of the Registrar