DocuSign Procedures

Request a DocuSign Account
If you are interested in a DocuSign Account, please fill out the: new user request form.
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.

Log in to DocuSign
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
Development: Vicki Casey
Office of the Registrar: Jay Haugen