

Welcome to DocuSign

~~Discussion and Training~~

Hosted by International Programs in Agriculture

Facilitators:

Sondra Booth, Ag Business Office

Cory Brenner, Food Science

Lynn Cornell, IPIA

D O C U S I G N T R A I N I N G

Current Process Review



1 2 3 4 5 6 7 8 9 10 11

E L E V E N E M A I L S

D O C U S I G N T R A I N I N G

DocuSign Process Review



- Collect information
- Prepare letter
- Upload to DocuSign
- Requests signatures

Same approvers but ALL electronic.

Recipients receive reminders to review, sign and approve

Letters are not “lost” in transit

Status of letters are quickly identified

DOCUSIGN TRAINING

Why DocuSign?

- Uniformity
- Efficiency
- Productivity

D O C U S I G N T R A I N I N G

Why DocuSign? Uniformity

- Letters processed in same manner
 - All signatures are electronic

DOCUSIGN TRAINING

Why DocuSign? Efficiency

- All processes are optimized
- Nothing is wasted (effort, time, energy)
- Uses resources in best way possible

D O C U S I G N T R A I N I N G

Why DocuSign? Productivity

- Increased output per unit of input
 - Completing task successfully
- Measurable and quantitative results

D O C U S I G N T R A I N I N G

Q & A?

- Focus on “Why Transition to DocuSign?”

DOCUSIGN TRAINING

Big Picture

Step 1

Using ISS liaison provides forms using DocuSign

- Move to hands-on training

D O C U S I G N T R A I N I N G

Ask inviting faculty member to provide CV of visitor and to fill out the following 3 forms using DocuSign.

1. Request form

FOOD SCIENCE DEPARTMENT Visiting Scholar / VUG / PostDoc Request Form

Full Name (per passport): _____

D.O.B. _____ Gender: _____

Email Address: _____ Mailing Address: _____

Position (please select one):

- Visiting Scholar
- Visiting Undergraduate Student
- Postdoc

Will Purdue ID card and/or Career Account be requested for this visitor? Yes No

Account to be charged for ISS Filing Fee (\$150)

WBE/Order #

Invitation Letter Information:

Describe fully the Goals/Objectives of visitor's research – a couple sentences or paragraph is sufficient.

Dates of Visit _____ to _____

Living Allowance (VS or VUG) / Rate of Pay (POSTDOC)

(Total) \$ _____ (per month) _____

If no living allowance will be provided, please state "NA"

Account to be charged for Living Allowance or Rate of Pay:

WBE/Order #

Inviting Faculty Signature: _____ Date _____

Business Office Signature: _____ Date _____

Department Head's Signature: _____ Date _____

Ask inviting faculty member to provide CV of visitor and to fill out the following 3 forms using DocuSign.

2. Confirmation of English Ability

Confirmation of English Ability

In order to issue a document allowing a visitor to apply for a J-1 exchange visitor visa, a documented interview must be conducted either in-person, by videoconferencing, or by telephone if videoconferencing is not a viable option. This interview must be conducted in English and confirm that the international visitor possesses sufficient English proficiency for the planned J program.

Visitors Name (as listed in passport):

Surname/Family Name: _____

Given name(s): _____

Date of Birth (month/day/year): _____

Name of Purdue employee conducting interview: _____

Position of Purdue employee conducting interview: _____

Phone number of Purdue employee: _____

Date of Interview: _____

Time of interview: _____

Length of interview: _____

Mode of Interview:

- in person
 videoconference
 other _____

I verify by checking **both** of the boxes below that to the best of my knowledge and belief, the interview above confirmed the English proficiency to be sufficient both:

- to successfully participate in visitor's program in this department and
 to function on a day-to-day basis in the West Lafayette community.

Name of inviting professor: _____

Signature of the inviting professor: _____

Date: _____

Ask inviting faculty member to provide CV of visitor and to fill out the following 3 forms using DocuSign.

3. Designee Form

Name : _____

Visiting Scholar
J-1 visa

Once all information is electronically submitted by the scholar, an email will be queued up and sent to you as the inviting faculty member. This is to confirm your understanding of your commitments to the J-1 program being used to permit this scholar's entry to the US below.

If you wish to designate me as your designee for this portion of the process, please read and place an ✓ in each of the 4 statement below and sign below and return to me.

<input type="checkbox"/>	I verify that to the best of my knowledge and belief, the above documentation or interview confirmed the English proficiency to be sufficient to successfully participate in this scholar's program in this department. *
<input type="checkbox"/>	I further verify this documentation or interview also confirmed the English proficiency to be sufficient to function on a day-to-day basis in the West Lafayette community. *
<input type="checkbox"/>	I confirm the above e-forms are correct regarding the program to which I am inviting/hiring this scholar. *
<input type="checkbox"/>	I or a member of my staff will meet at least monthly with this scholar regarding the research objective listed above. I or a member of my staff will report to the ISS liaison if we have not seen this scholar for more than 30 days. *

I or a member of my staff will report to the ISS liaison if the scholar ends the program more than 30 days early or performs research/teaching at a different worksite than the one(s) in this request. *

I give my authorization to Cory Brenner to serve as my designee for the 4 items listed above.

Signature

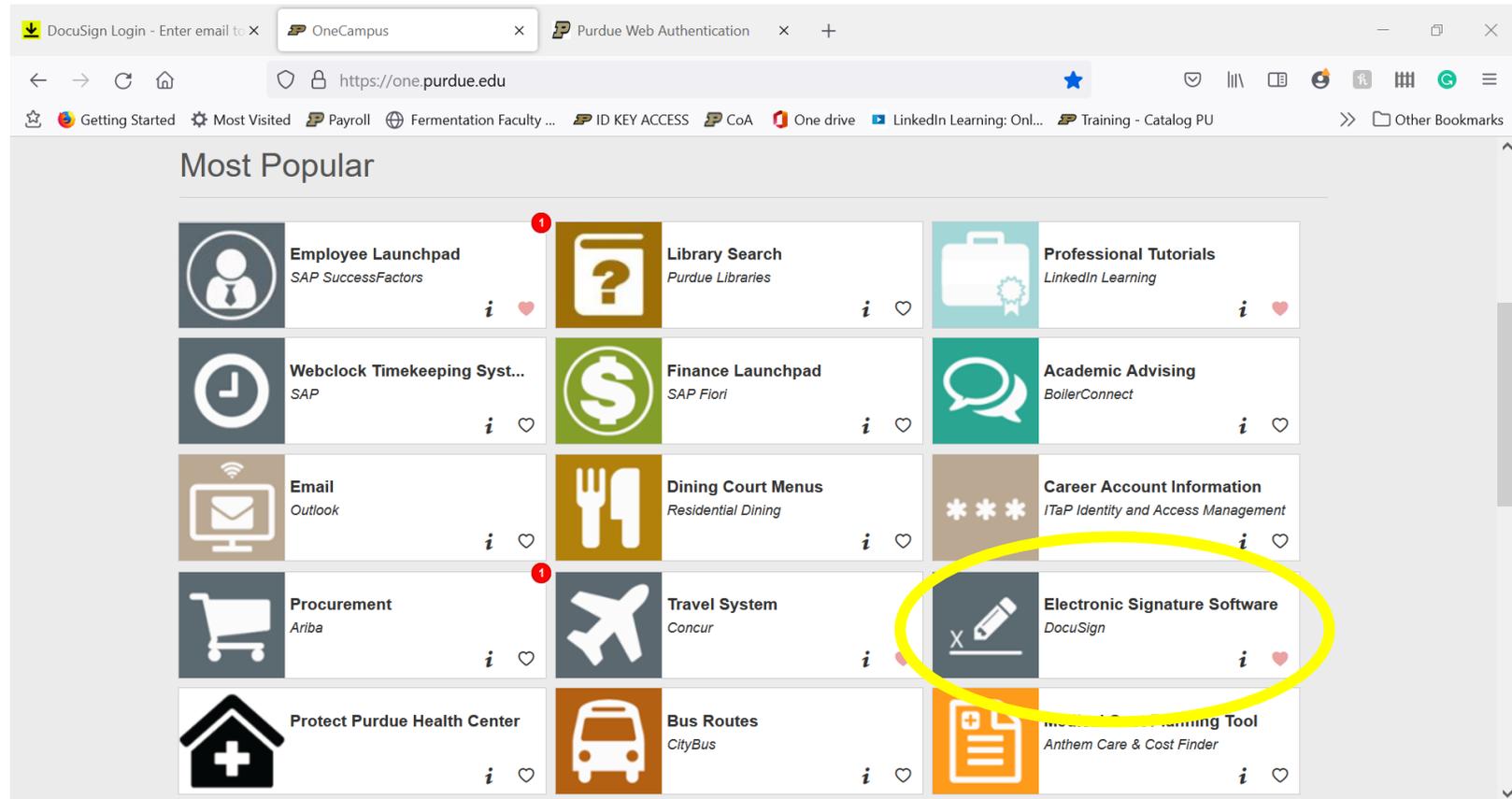
Date

Open DocuSign -

Go to <https://one.purdue.edu>

Select “Electronic Signature Software – DocuSign”

Log in using Boilerkey



Click “Start”, then “Send an Envelope”



Last 6 Months



DocuSigned by:
Coreen Brenner
A807791B40A6460...

0
Action Required

1
Waiting for Others

0
Expiring Soon

59
Completed

Drop documents here to get started

or

- START ▾
- Send an Envelope
- Sign a Document
- Use a Template

Click "UPLOAD" and select 3 forms

Add Documents to the Envelope



UPLOAD

USE A TEMPLATE

GET FROM CLOUD ▾

Add Recipients to the Envelope

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

ADD FROM CONTACTS SIGNING ORDER

Add Documents to the Envelope

Request Form
Visiting Scholar / VUG / PostDoc

Full Name (per passport): _____
 D.O.B. _____ Gender: _____
 Email Address: _____ Mailing Address: _____

Position (please select one):
 Visiting Scholar Will Purdue ID card and/or Career Account be requested for this visitor? Yes No
 Visiting Undergraduate Student No
 Postdoc

Account to be charged for ISS Filing Fee (\$150)

WBE Order #

Invitation Letter Information:
 Describe fully the Goals/Objectives of visitor's research – a couple sentences or paragraph is sufficient.

Confirmation of English Ability

In order to issue a document allowing a visitor to apply for a J-1 exchange visitor visa, a documented interview must be conducted either in person, by videoconferencing, or by telephone if videoconferencing is not a viable option. This interview must be conducted in English and confirm that the international visitor possesses sufficient English proficiency for the planned program.

Visitors Name (as listed in passport):
 Surname/Family Name: _____
 Given name(s): _____
 Date of Birth (month/day/year): _____

Name of Purdue employee conducting interview: _____
 Position of Purdue employee conducting interview: _____
 Phone number of Purdue employee: _____

Date of interview: _____
 Time of interview: _____
 Length of interview: _____

Name: _____
 Visiting Scholar
 J-1 visa

Once all information is electronically submitted by the scholar, an email will be queued up and sent to you as the inviting faculty member. This is to confirm your understanding of your commitments to the J-1 program being used to permit this scholar's entry to the US below.

If you wish to designate me as your designee for this portion of the process, please read and place an "X" in each of the 4 statements below and sign below and return to me.

I verify that to the best of my knowledge and belief, the above documentation or interview confirmed the English proficiency to be sufficient to successfully participate in this scholar's program in this department. *

I further verify this documentation or interview also confirmed the English proficiency to be sufficient to function on a day-to-day basis in the West Lafayette community. *

I confirm the above e-forms are correct regarding the program to which I am inviting/hiring this scholar. *

I or a member of my staff will meet at least monthly with this scholar regarding the research objective listed above. I or a member of my

UPLOAD

USE A TEMPLATE

GET FROM CLOUD ▾

Request form.pdf
1 page

Confirmation of English Abili...
1 page

Designee Form.pdf
1 page

Add Recipients to the Envelope

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

ADD FROM CONTACTS

SIGNING ORDER

SEND NOW

NEXT

Add Recipients to Envelope.

Add Recipients to the Envelope

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

 ADD FROM CONTACTS

 SIGNING ORDER

Set signing order

Name *

 NEEDS TO SIGN ▾

CUSTOMIZE ▾



Email *

 ADD RECIPIENT

Click the box “Set signing Order”

Add:

1. Inviting Faculty
2. Business office
3. Department Head

SEND NOW

NEXT

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

Set signing order

1

Name * ✍️ NEEDS TO SIGN ▾ CUSTOMIZE ▾ 🗑️

⋮

Dr. Purdue Pete 👤

Email *

PurduePete@purdue.edu

2

Name * ✍️ NEEDS TO SIGN ▾ CUSTOMIZE ▾ 🗑️

⋮

Marla Carey 👤

Email *

careym@purdue.edu

3

Name * ✍️ NEEDS TO SIGN ▾ CUSTOMIZE ▾ 🗑️

⋮

Dr. Department Head 👤

Email *

DH@purdue.edu

Click "NEXT"

SEND NOW **NEXT**

- Click “Keep PDF form data”
- Click “Confirm”
- Fill out the form fields.

Please DocuSign: Confirmation of English Ability.pdf, Designee Form.pdf, Request form.pdf

Dr. Purdue Pete

Search Fields

Standard Fields

- Signature
- Initial
- Date Signed
- Name
- Email
- Company
- Title
- Text
- Checkbox
- Dropdown
- Radio
- Formula
- Attachment
- Note
- Approve
- Decline

Full Name (per passport)

D.O.B. _____

Email Address: _____

Position (please select one)

- Visiting Scholar
- Visiting Undergraduate
- Postdoc

Account to be charged for ISS Filing Fee (\$150)

CONFIRM

What would you like to do?

- Assign to:
-- Select Recipient --
- Keep PDF form data
- Delete data

PDF form data is preserved and read-only on the envelope; data cannot be edited.

[Learn More](#)

CONFIRM

Documents

- Request form.pdf
- Confirmation of English...
- Designee Form.pdf

BACK SEND

- After all fields on the 3 forms are complete, click “SEND”
- Fill out the message box. Naming convention:
 - VS/VUG forms - Last name, First name

The screenshot shows a mobile application interface for creating an email. At the top, there is a black header with a back arrow and the text "VS/VUG forms - Doe, Jane". Below the header is a white button with a plus icon and the text "ADD RECIPIENT". The main content area is white and contains the following elements:

- Message to All Recipients**: A checkbox labeled "Custom email and language for each recipient" which is currently unchecked.
- Email Subject ***: A text input field containing "VS/VUG forms - Doe, Jane". Below the field, it says "Characters remaining: 75".
- Email Message**: A large text area containing the placeholder text "Please fill out the necessary fields and sign where indicated." and a green circular icon with a white 'G' in the bottom right corner. Below the text area, it says "Characters remaining: 9938".

- Click “NEXT”
-
- A close-up of the bottom right corner of the form, showing two buttons: a white "SEND NOW" button and a yellow "NEXT" button. Above the buttons is a dropdown menu with a chevron icon and a right-pointing arrow.
- This will begin the signature process.
 - Each time a recipient views, or signs the envelope you will get an email.

- Once all signatures are submitted, you will get an email.
- Download and save the forms
- Submit RPS for the VS/VUG
- Use information on forms to write letter of invitation.
- Once you get Approval for Invitation Letter from ISS, begin the next envelope. This envelope includes the following documents:
 1. Letter of invitation
 2. CV
 3. Confirmation of English Ability
 4. Approval for Invitation from ISS

- Set signing order
 1. Inviting Faculty, PurduePete@purdue.edu
 2. Department Head, DH@purdue.edu
 3. Visiting Scholar, JaneDoe@gmail.com
 4. Beth Siple, sibleb@purdue.edu – Viewer
 5. Sondra Booth, booths@purdue.edu – Assigner
 6. IPIA signature, Peter Hirst, hirst@purdue.edu
 7. IPIA copy, Lynn Cornell, lcornell@purdue.edu - Copy
 8. Dept Copy, FSBO, FSBO@purdue.edu – Copy
- After fields are assigned to the letter, click “SEND”

1

Name *
Dr. Department Head

NEEDS TO SIGN CUSTOMIZE

Email *
DH@purdue.edu

2

Name *
Dr. Purdue Pete

NEEDS TO SIGN CUSTOMIZE

Email *
Purdue.Pete@purdue.edu

3

Name *
Jane Doe

NEEDS TO SIGN CUSTOMIZE

Email *
JaneDoe@gmail.com

4

Name *
Beth Siple

NEEDS TO VIEW CUSTOMIZE

Email *

5

Name *
Sondra Booth

SPECIFY RECIPIENTS CUSTOMIZE

Email *
booths@purdue.edu

6

Role *
IPIA signature

NEEDS TO SIGN CUSTOMIZE

Name *

Email *

7

Role
IPIA copy

CC RECEIVES A COPY CUSTOMIZE

Name *
Lynn Cornell

Email *
lbergfel@purdue.edu

8

Role
FSBO copy

CC RECEIVES A COPY CUSTOMIZE

Name *
FSBO

Email *
FSBO@purdue.edu

- Fill out the message box. Naming convention:
 - LASTname, FIRSTname, VS/VUG, Dept
 - Add Message
- Click “SEND”

+ ADD RECIPIENT

Message to All Recipients

Custom email and language for each recipient

Email Subject *

LastNAME, FirstNAME, VS/VUG, Dept

Characters remaining: 67

Email Message

Please sign where indicated in the offer letter. Additional documents as required by IPIA attached.
Thanks!

Characters remaining: 9891

SEND NOW

NEXT

Click "SEND"

Visiting Scholar Liaison Process

Step 1

- Using DocuSign ask inviting faculty member to fill out the following forms
 - Request form
 - This form will provide necessary information about the visiting scholar to begin the ISS process. It will also provide the Account number to be used for the ISS filing fee and the living allowance should one be provided.
 - Signatures collected on this form will include: inviting faculty, Business office, and Department head.
 - Confirmation of English Ability
 - Designee Form
- Ask the faculty member to provide the CV for the visiting scholar.

Step 2

- ISS liaison enters the new person to myISS for the visiting scholar.
- Initiate an RPS (restricted party screening) by export control in myISS.
- Email approval is received, move on to step 3.

Step 3

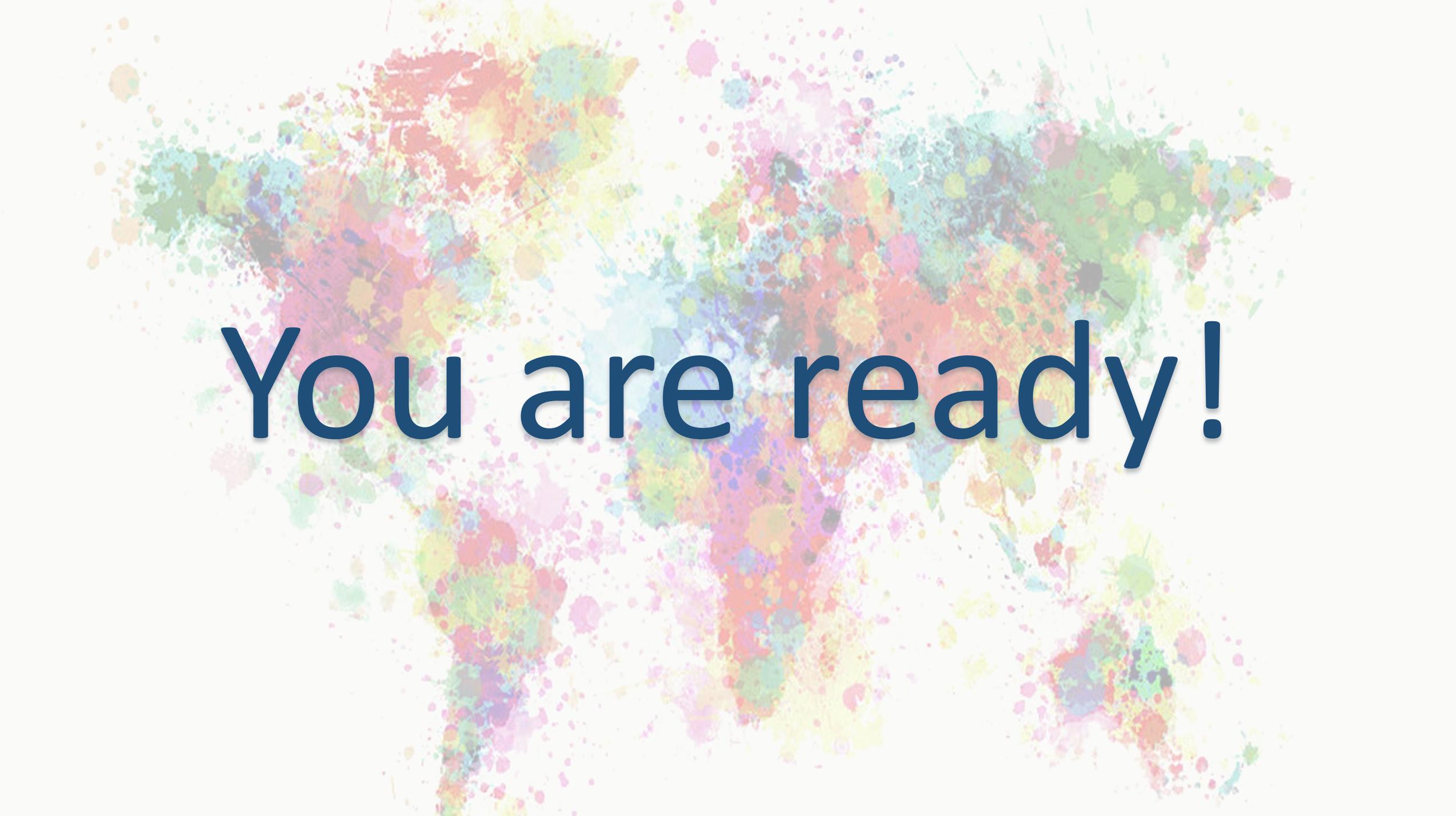
- ISS Liaison drafts invitation letter.
- A DocuSign envelope should be initiated including the following documents:
 - Invitation Letter
 - Visiting Scholar CV
 - Confirmation of English Ability
 - RPS approval

This envelope is routed with signing order:

1. Inviting Faculty (Signer)
2. Department Head (Signer)
3. Visiting Scholar (Signer)
4. Beth Siple (Viewer)
5. Sondra Booth (Assigner)
6. IPIA Signature (Signer – usually Peter Hirst)
7. Lynn Cornell (IPIA Copy)
8. Department Business office (Copy)

Step 4

Proceed with the normal steps within myISS.



You are ready!