Welcome to DocuSign
~~Discussion and Training~~

Hosted by International Programs in Agriculture

Facilitators:
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DOCUSIGN TRAINING

DocuSign Process Review

Department Liaison → Department Head → Business Office → International Programs → Department Liaison

- 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

DOCUSIGN TRAINING

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?"

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

Big Picture

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.

☐	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 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
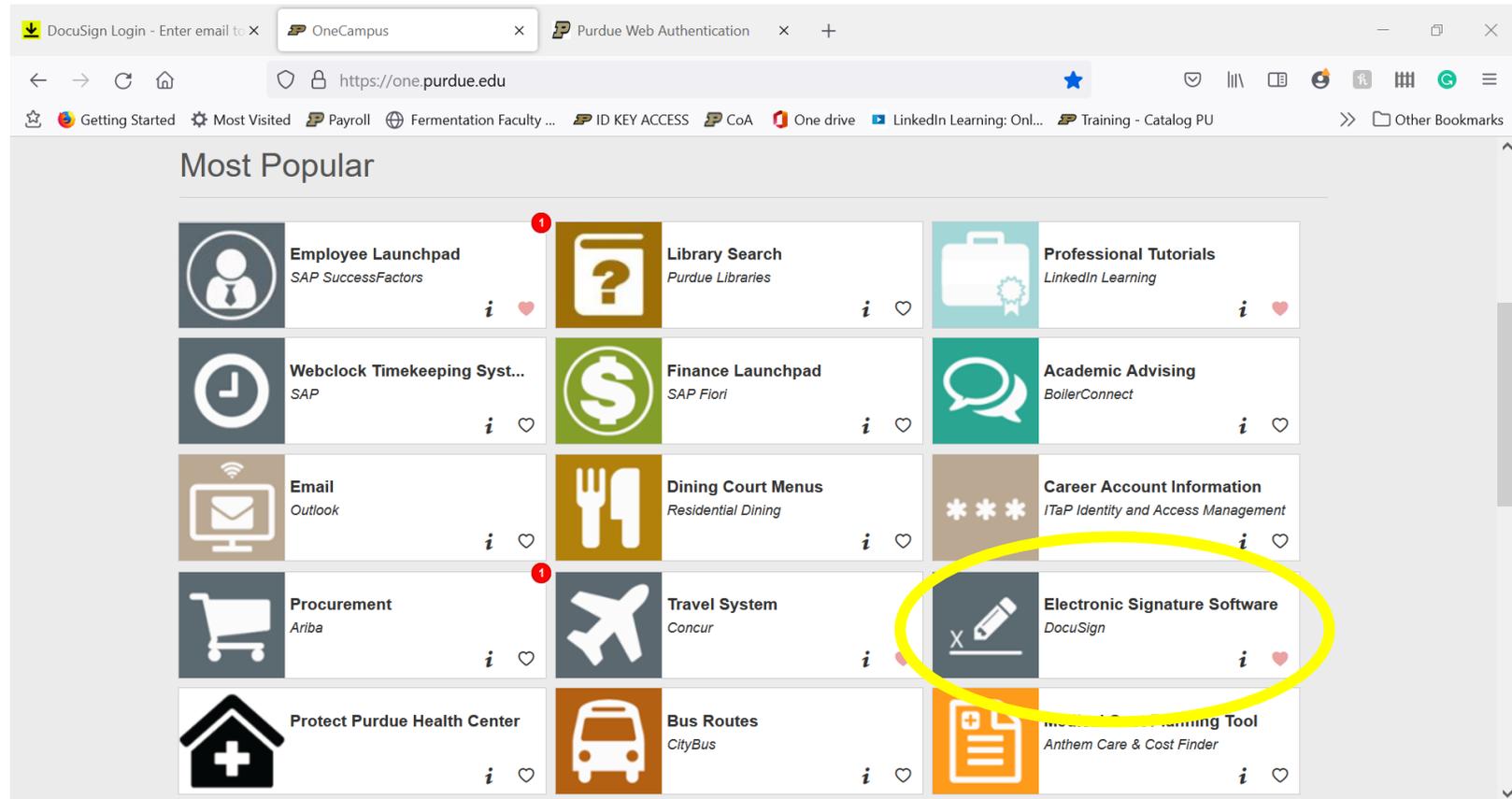
Click "Start", then "Send an Envelope"

Click "UPLOAD" and select 3 forms

Add Documents to the Envelope

Request form.pdf
1 page

Confirmation of English Abili...
1 page

Designee Form.pdf
1 page

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

SEND NOW   NEXT

Add Recipients to Envelope.

ACTIONS ⌄   ADVANCED OPTIONS   NEXT

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

SEND NOW   NEXT

Click the box "Set signing Order"
Add:
1. Inviting Faculty
2. Business office
3. Department Head

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

☑ Set signing order

1

Name *
Dr. Purdue Pete   👤

✎ NEEDS TO SIGN ▾   CUSTOMIZE ▾   🗑

Email *
PurduePete@purdue.edu

2

Name *
Marla Carey   👤

✎ NEEDS TO SIGN ▾   CUSTOMIZE ▾   🗑

Email *
careym@purdue.edu

3

Name *
Dr. Department Head   👤

✎ NEEDS TO SIGN ▾   CUSTOMIZE ▾   🗑

Email *
DH@purdue.edu

Click "NEXT"

⌄

›

SEND NOW   NEXT

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

- 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

- Click "NEXT"

- 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"

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

ACTIONS ⌄   ADVANCED OPTIONS   NEXT

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.
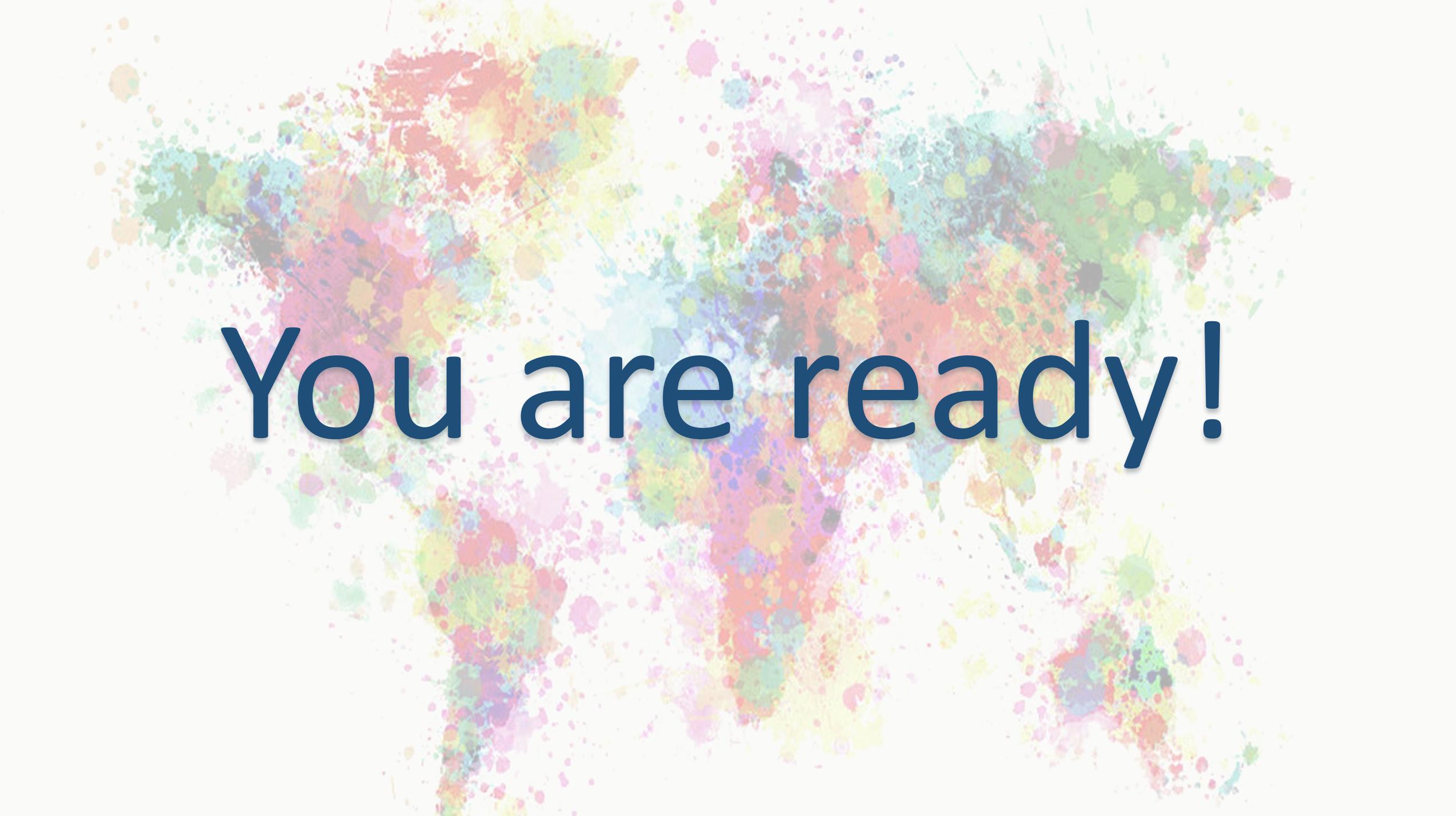- Email approval is received, move on to step 3.

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!