Route an Ad Hoc Contract Document for Electronic Signatures

SWIFT’s Supplier Contracts module allows agencies to create and electronically sign ad hoc contract documents. After you create an ad hoc contract document electronically using SWIFT, you can route it electronically for signatures.

SWIFT uses a limited version of DocuSign for contract document signatures.

This guide provides an overview of using SWIFT for electronic signatures with DocuSign. It lists the steps on how to route an ad hoc contract document for electronic signatures using DocuSign. There is a separate guide for creating and processing ad hoc contract documents through SWIFT.

Steps to complete

• Step 1: Access the ad hoc contract document
• Step 2: Prepare and route the ad hoc contract document for electronic signatures
• Step 3: Complete the document

Overview of Using SWIFT for Electronic Signatures with DocuSign

SWIFT uses DocuSign for contract document signatures.

• Requests for reviewing and signing contract documents go from SWIFT to DocuSign to the signer’s email address.
• Contract signers do not need to log into SWIFT. They can easily review and sign ad hoc contract documents through their email and DocuSign.
• The contract coordinator needs to activate a DocuSign account before routing any contract documents for electronic signatures.
• IMPORTANT! Make sure that your agency knows the correct email addresses for all the signers before routing this document through DocuSign.

Request and set up a DocuSign account.

In order to send contract documents electronically through SWIFT, you will first need to request and activate a DocuSign account.

1. Your agency leadership needs to complete and sign the Request for Access to SWIFT Statewide Systems security form. On the Supplier Contracts section of that form, check the YES – SWIFT DocuSign Account Needed box.
2. MN.IT’s security will review this request. Once approved, the SWIFT Procurement team will send you an email notification to activate your account.
3. You will also receive an additional email from DocuSign with your Access Code.
Ensure correct SWIFT Security Role.
Since SWIFT uses DocuSign, contract signers do not need SWIFT security roles for electronic signatures.

However, as the contract coordinator routing a contract document for electronic signatures, make sure that you have the correct role for routing contract document electronically. Typically, you will need one of these roles.

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<tr>
<th>Role</th>
<th>Description</th>
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<tbody>
<tr>
<td>SC Administrator M_FS_SC_DOC_ADMIN</td>
<td>This role should be given to users responsible for creating, amending, and managing ad hoc documents.</td>
</tr>
<tr>
<td>Contract Administrator M_FS_SC_CONTRACT_ADMIN SC</td>
<td>This role should be given to users responsible for the day-to-day management of contracts and documents. Users can create and amend contracts, documents, and agreements.</td>
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Set up electronic signatures when creating the ad hoc document in SWIFT.
During the Configurator Selector part of creating an ad hoc contract document through SWIFT, the buyer must select the electronic signature process before saving and processing the contract document. Otherwise, SWIFT will not be able to route it for electronic signatures. If you forget this step, you will need to create a new ad hoc contract document.

Routing the ad hoc document to the Office of State Procurement.
When adding the Office of State Procurement for signatures, use this email: OSPHelp.Line@state.mn.us.

Check the Status of the ad hoc contract document.
The ad hoc contract document must be in a “Draft” Status. If you completed the document in SWIFT before routing it for electronic signatures, you will have to press the Edit Document button and restart the workflow process again.

Steps to route an ad hoc contract document for electronic signatures using DocuSign

Step 1: Access the Document Management page

<table>
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<tr>
<th>Navigation Options</th>
<th>Navigation Path</th>
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1. SWIFT opens the Add a Document page. Press the Find an Existing Document link.
2. SWIFT opens the Find an Existing Document page.

Search for the ad hoc document you wish to edit.
- For example, search by Administrator to find all ad hoc documents you created.
- Then, press the Search button.

SWIFT opens the Search Results section.
- Make sure that its Status is “Draft.”
- Press the Document Keys link of the correct ad hoc document.

Step 2: Prepare and route the ad hoc contract document for electronic signatures

1. On the bottom of the Document Management page, go to the Other Document Actions section. Press the Prepare and Route for e-Signature button. The appearance of this button depends upon the Status. It must be “Draft.”

2. SWIFT opens the Send Document for Signing page. Complete it as follows.
“Sign Based on Sign Order”: keep the “Sign Based on Sign Order” default. Otherwise, all your signers will get the email at the same time.

- Use the defaulted Email Address tab to enter the following information for each signer.
  - Email – You will enter these manually.
  - User – Enter the Employee ID of the signer. You can look it up on the search icon.
  - Recipient Name – SWIFT populates this field after entering Employee ID.
  - Sign Order – Enter the number of the order in which each signer receives the email invitation.

- On the Subject area, update it as needed. It will appear in the email’s Subject Line.
- On the Message area, enter a message that will appear in their email.

- Select the Add a New Row icon (plus sign) to add a row for each signer. Complete the information for each signer.
- Select the Send button when you are completely done adding each signer.

SWIFT returns you to that ad hoc document’s Document Management page.

3. Monitor the status of the signatures on the Signing Details section. Select the Expand Section icon to open this area.

When each signer completes their signature, this Sign Status will be “Signed” for that line.
When all signers complete their signatures, the Signature Status will update from “Pending Signatures” to “Signed.”

**Step 3: Complete the document**

When all signers have completed their reviews and the Signature Sign Status is “Signed,” you are ready to complete the document. Press the Complete Document button.

SWIFT updates the Status to “Complete.” This ad hoc contract document is ready for use.

- You can select the Send to Contacts button to show the signers that the signatures are complete.
- You can select the View Document button to see the document at any time.
- You can also now electronically attach it to contract documents created and processed electronically through SWIFT.

You have successfully routed an ad hoc contract document for electronic signatures using DocuSign.