

## Review and Sign an Imported Contract Document Using DocuSign

There are two ways for agencies to route a contract document through SWIFT to be reviewed in DocuSign.

1. Contract administrators can import an existing contract document into SWIFT and then process the signatures electronically through DocuSign.
2. Contract administrators can create a system-generated contract document within SWIFT and then process the signatures electronically through DocuSign.

Depending on the route the agency uses for electronic signatures, the format of the document you view in DocuSign will be different. If the agency routed it by importing the contract document, the contract document in DocuSign will be in a PDF format. Use this reference guide.

**IMPORTANT!** SWIFT will send an email with the DocuSign link on it. Save this email invitation. Use it every time you need to access the contract document.

This guide provides the steps to review and sign an imported contract document in SWIFT using DocuSign. It describes what happens when you sign the contract document. It also provides a summary of the other actions you can take.

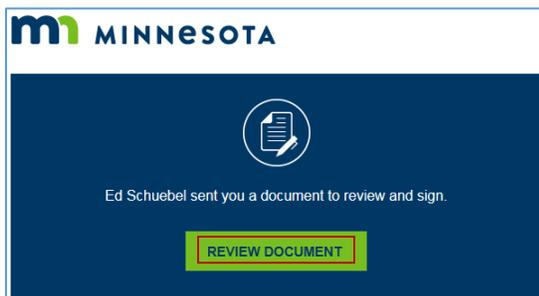
Steps to complete

- Step 1: Access the contract document
- Step 2: Review the contract document and any attachments
- Step 3: Sign the PDF contract document using the Drag and Drop menu

### Steps to review and sign an imported contract document in DocuSign

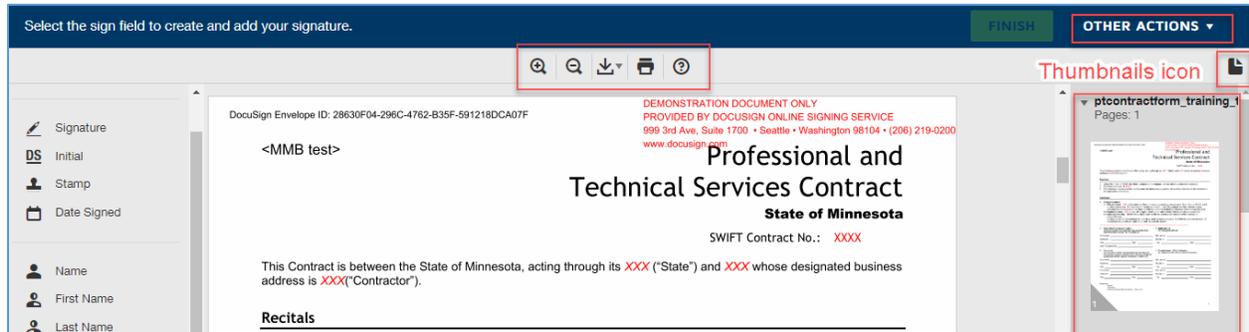
#### Step 1: Access the contract document

As a designated contract signer, you will receive an email notification about the document to review and sign. It is from the State of Minnesota. In the body of the email message, select the **Review Document** button.



## Step 2: Review the contract document and any attachments

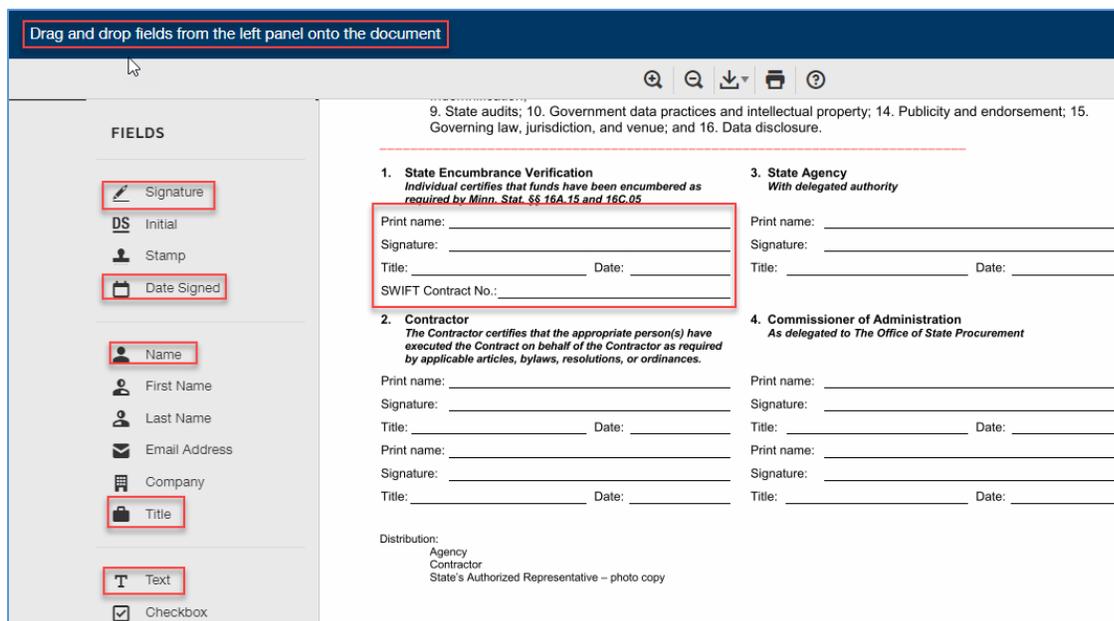
1. DocuSign displays the contract document. Click on the document and DocuSign opens up it up.
2. On the right menu, select the **Thumbnails** icon. DocuSign displays the pages of any attachments.



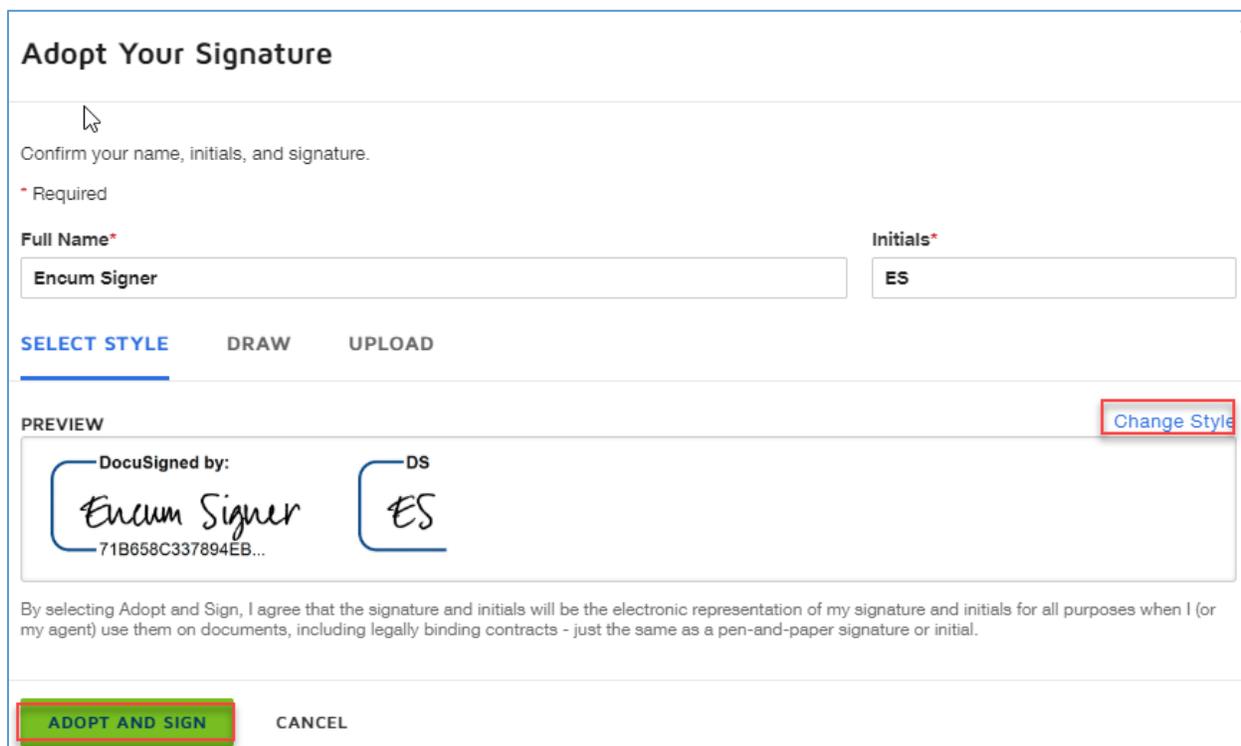
3. Review the contract document and attachments following your agency's review process.
4. At the middle of the top banner, there are other icons to select. For example, you can download the document, print it, zoom in or zoom out, or get help.
5. At the top right of the banner, you can take other actions. You can finish it later, assign it to someone else, decline to sign, get help or select other options. These actions are described at the end of this guide.

## Step 3: Sign the PDF contract document using the Drag and Drop menu

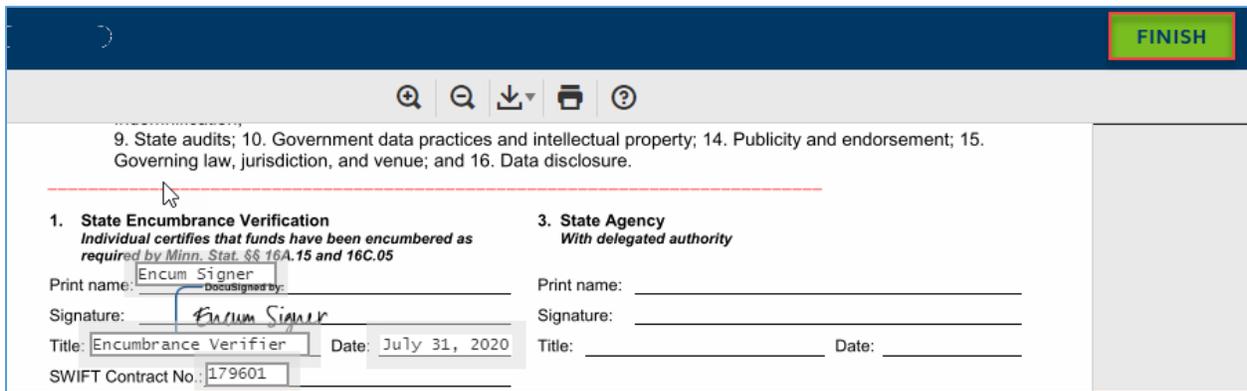
1. When you are ready to sign, use the scroll on the right side to go to the page with the signature block.
2. Notice the Drag and Drop menu on the left panel. Drag the items from the left menu and drop them on your signature section on the signature block. DocuSign will fill in the items from the SWIFT record.
3. Drag and drop the following items:
  - On the Print Name field of the PDF document, drag the Name from the left menu.
  - On the Title field, drag the Title from the left menu.
  - On the Date field, drag the Date Signed from the left menu. DocuSign will input the current date.
  - If you are adding the SWIFT Contract No., drag the Text box and fill in the Contract Number.



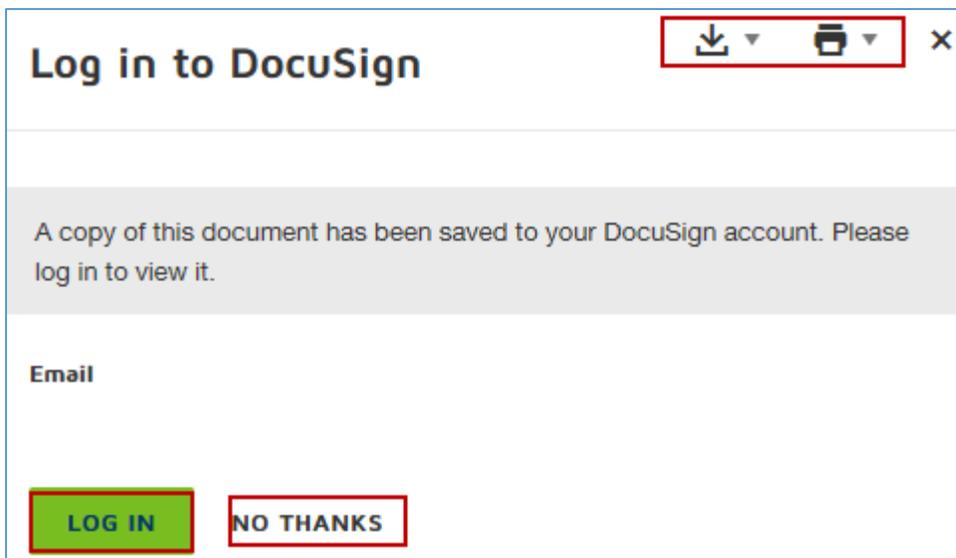
- When you select Signature from the left menu, DocuSign opens a Signature icon.
  - When you move the Signature icon to the Signature line, DocuSign opens the *Adopt your Signature* window.
  - You can select the Change Style link to change the signature.
  - When you are done, select Adopt and Sign.



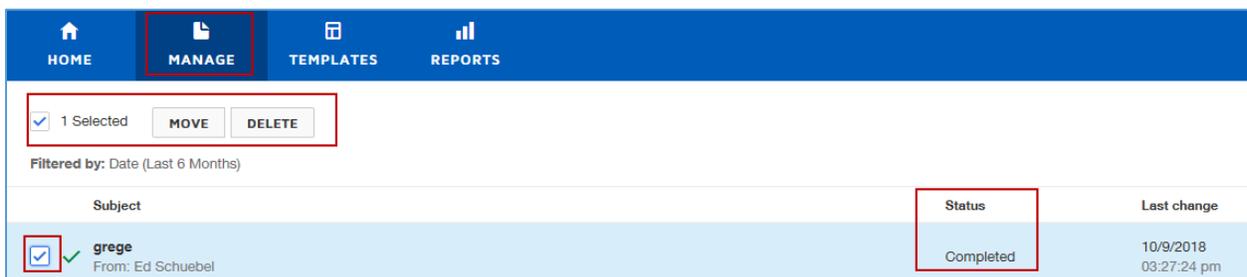
- DocuSign updates the signature block of the contract document showing the fields you dragged and dropped, and it shows the signature as you adopted. Go to the top of this page and select **Finish**.



- DocuSign displays a **Log In** message.



- At the top of the page, you can select icons that let you download or print the updated copy.
- You can select **Log In** to see the document if you have a DocuSign Account. Once in your account, you can create folder and organize your documents.



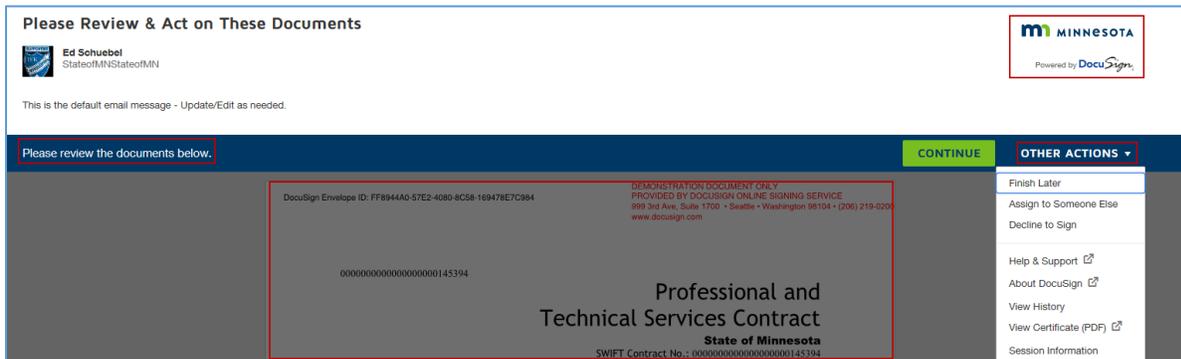
- You can select **No Thanks** and DocuSign will log you out.

SWIFT notifies the contract coordinator that all signers completed their signatures on the contract document. The contract coordinator executes the contract document.

**You have successfully reviewed and signed a imported contract document electronically using SWIFT.**

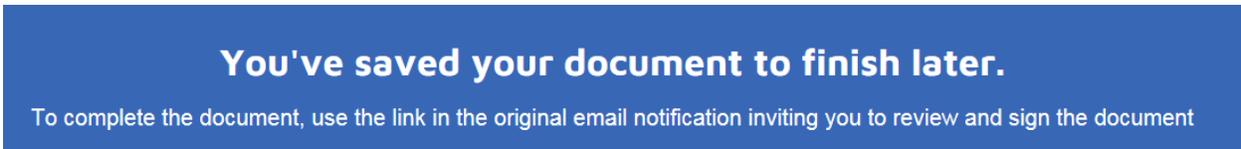
## Summary of other actions you can take

If at any time, you choose **Other Actions** on from the top menu, here is what DocuSign displays.



### 1. Finish Later:

DocuSign logs you out of the contract document. Access it again from the original email notification.



### 2. Assign to Someone Else:

Add your email address, name and a reason for changing the assignment. Select the **Assign to Someone Else** button. DocuSign will send an email notification to the new signer and the original signer.

### Assign to Someone Else

\* Required

**Email Address for the New Signer \***

**New Signer's Name \***

**Please provide a reason for changing signing responsibility**

I will be going on medical leave. This change has been approved by the financial director.

157 characters remaining

Selecting the Assign to Someone Else button will send a notification to the person to whom you assigned this envelope. The original sender will also receive a notification. You will be added as a Carbon Copy (CC) recipient.

**ASSIGN TO SOMEONE ELSE**      CANCEL

### 3. Decline to Sign:

If you select **Decline to Sign**, DocuSign opens up the **Caution** page.

- Select the **Continue** button to decline or deny this contract document.
- Or, select **Finish Later** and contact the sender of this contract document.
- In either case, provide a reason for declining this contract document to its sender.

### Caution

If you choose to continue, this document will be void and inaccessible to other signers.

To request changes to this document, please select **FINISH LATER** and contact the sender directly with your request.

**CONTINUE**      **FINISH LATER**      CANCEL

**NOTE:** If any of the signers declines to sign a contract document, SWIFT notifies the contract coordinator and stops the signature routing.

4. Select other options such as get help, view the history or view the certificate of completion.

Please review the documents below.

**CONTINUE**
**OTHER ACTIONS** ▾

DocuSign Envelope ID: FF844A0-57E2-4080-8C58-169478E7C984

000000000000000000000000145394

**Professional and Technical Services Contract**  
State of Minnesota  
SWIFT Contract No.: 000000000000000000000000145394

Finish Later

Assign to Someone Else

Decline to Sign

Help & Support [↗](#)

About DocuSign [↗](#)

View History

View Certificate (PDF) [↗](#)

Session Information