

QUICK REFERENCE GUIDE

May 17, 2024

Review and Sign a Contract Document Using DocuSign

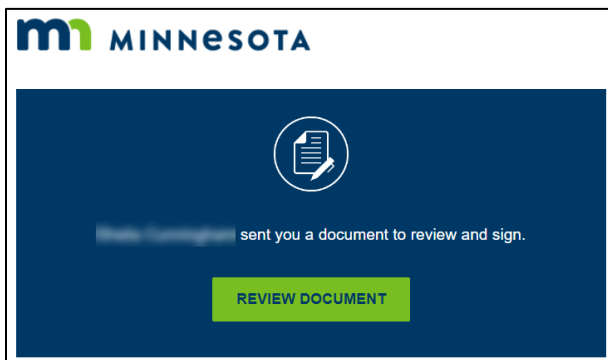
IMPORTANT! SWIFT will send an email with the DocuSign link on it to review and sign a contract document. Save this email invitation. Use it every time you need to access the contract document.

This guide provides the steps to review and sign a contract document sent from 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 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.



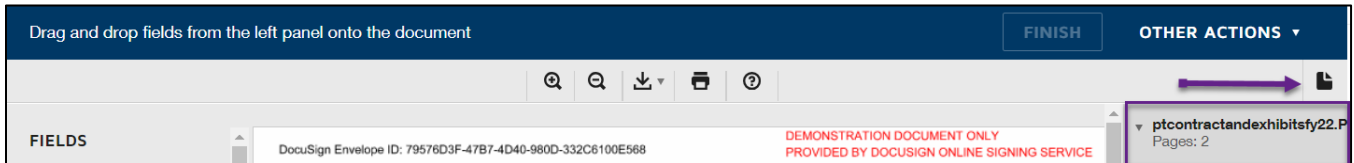
Step 2: Review the contract document and any attachments

1. DocuSign displays the contract document.



SWIFT STATEWIDE INTEGRATED FINANCIAL TOOLS

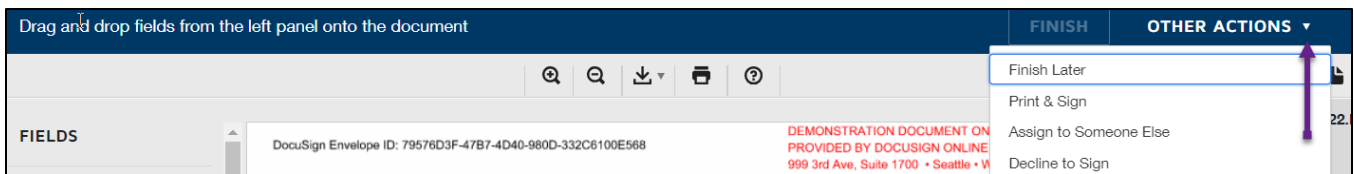
- a. On the top left, you may need to review the message and select the **check box** to agree to use the electronic records and signatures.
 - b. On the right menu, press the **Continue** button.
2. DocuSign opens the contract document for your review.
- a. On the top right, select the **Thumbnails** icon. DocuSign displays the pages of any attachments.



- b. Review the contract document and attachments following the agency's review process.
- c. 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 from DocuSign.



- d. 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

When you are ready to sign, scroll to the page with the signature block.

Drag and Drop Menu

In the **Fields** menu in the left panel, drag the items from the left menu and drop them on the signature section on the signature block. DocuSign will fill in the items from the SWIFT record. Drag and drop the following items.

- **Print Name.** Drag the Name from the left menu.
- **Title.** Drag the Title from the left menu.
- **Date Signed.** Drag the Date Signed from the left menu. DocuSign will input the current date.

- **Text.** If you are adding the SWIFT Contract Number, drag the Text box and fill in the Contract Number.

FIELDS

- Signature
- Initial
- Stamp
- Date Signed
- Name
- First Name
- Last Name
- Email Address
- Company
- Title

Recitals

1. State issued a solicitation identified as [Solicitation identification] [SWIFT Event No.] on [Solicitation date] for

Contract

1. **Term of Contract**

2. **Contractor's Duties**

1. **State Encumbrance Verification**
Individual certifies that funds have been encumbered as required by Minn. Stat. §§ 16A.15 and 16C.05

Print Name:

Signature: _____

Title: Date:

SWIFT Contract No.

3. **State Agency**
With delegated authority

Print Name: _____

Signature: _____

Title: _____ Date: _____

4. **Commissioner of Administration**
As delegated to The Office of State Procurement

Signature

When you select **Signature** from the left menu, DocuSign opens a Signature icon.

- **Adopt Your Signature.** When you move the Signature icon to the Signature line, DocuSign opens the Adopt your Signature window.
- **Change Style.** As an option, you can select the **Change Style** link to change the signature.
- **Adopt and Sign.** When you are done, select **Adopt and Sign**.

Adopt Your Signature

Confirm your name, initials, and signature.

* Required

Full Name* **Initials***

SELECT STYLE **DRAW** **UPLOAD**

PREVIEW [Change Style](#)

DocuSigned by:
Marian Anderson
FF6113DD29574A9... **DS**
MA

By selecting Adopt and Sign, I agree that the signature and initials will be the electronic representation of my signature and initials for all purposes when I (or my agent) use them on documents, including legally binding contracts.

ADOPT AND SIGN CANCEL

Finish/Sign the Contract Document

DocuSign updates the signature block of the contract document showing the fields you dragged and dropped, and it shows the signature as you adopted. If you wish to sign this document, go to the top or bottom of this page and select **Finish**.

1. State Encumbrance Verification <i>Individual certifies that funds have been encumbered as required by Minn. Stat. §§ 16A.15 and 16C.05</i>	3. State Agency <i>With delegated authority</i>
Print Name: <input type="text" value="Marian Anderson"/>	Print Name: _____
Signature: <input type="text" value="Marian Anderson"/>	Signature: _____
Title: <input type="text" value="Contract Administrator"/> Date: <input type="text" value="May 3, 2024"/>	Title: _____ Date: _____
SWIFT Contract No. <input type="text" value="241536"/>	

Ready to Finish?
You've completed the required fields. Review your work, then select **FINISH**.

FINISH

You're Done Signing

1. DocuSign displays a "You're Done Signing" window. Select **Continue**.

You're Done Signing

A copy of this document will be sent to your email address when completed by all signers. You can also download or print using the icons above.

To learn more about signing, click [here](#).

CONTINUE

2. DocuSign opens that says, "Start Sending and Signing Documents." You can close this browser.
3. DocuSign sends an email with a link to view the completed document.
4. 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 contract document electronically using SWIFT.

Other Actions

If at any time, you choose **Other Actions** on from the top menu, DocuSign opens a menu of options. You can finish later, assign it to someone else, decline to sign, and select other options.

Finish Later

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

Assign to Someone Else

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

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.

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

Other options

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