Using DocuSign with eMMA
Quick Reference Guide

Overview

This Quick Reference Guide (QRG) shows how to incorporate DocuSign into your contract workflow in the eMaryland Marketplace Advantage (eMMA). In this process, a "signee" represents a user involved with the contract (Vendor, Legal Approver, and/or authorized state officer) who needs to sign one or more contract documents.

NOTE: For best results, use the Google Chrome browser to access eMMA.

NOTE: Make sure you follow ALL instructions in this QRG, including the Prerequisite Steps.

Prerequisites

Prerequisite Steps

This QRG assumes your solicitation is complete, apparent awardee selected and that you have created a contract workspace in eMMA. This process shows the signature process for **two** Contract Documents.

1. Make sure you have uploaded any relevant documentation into eMMA related to the contract in the Documents tab, including the Certificate of Standing and the Tax Clearance (See 13 eMMA QRG Create a Contract from Scratch, Steps 16-25).
2. Enter as much information into your Contract Document as possible, so that the only thing left to do is obtain signatures, initials, and dates of signatures.
3. Make sure you have uploaded **at least one unsigned** Contract Document(s) to eMMA in the existing contract (See 13-eMMA QRG Create a Contract from Scratch, Steps 26-28).
4. Make sure you have the names and emails of anyone who is a signee (a person who signs the document).

Step-by-Step Instructions

Prepare Contract Documents for DocuSign in eMMA

NOTE: Do not start this process without completing the Prerequisite Steps (above).

1. Navigate to eMMA at https://emma.maryland.gov and click the **State SSO Login (Secure Auth)** button or the **MDOT SSO Login (MSAzure)** button, and log in with your credentials, if necessary.

2. Click the **Contracts** tab at the top of the webpage to open the drop-down menu and select the **Browse Contract** option.

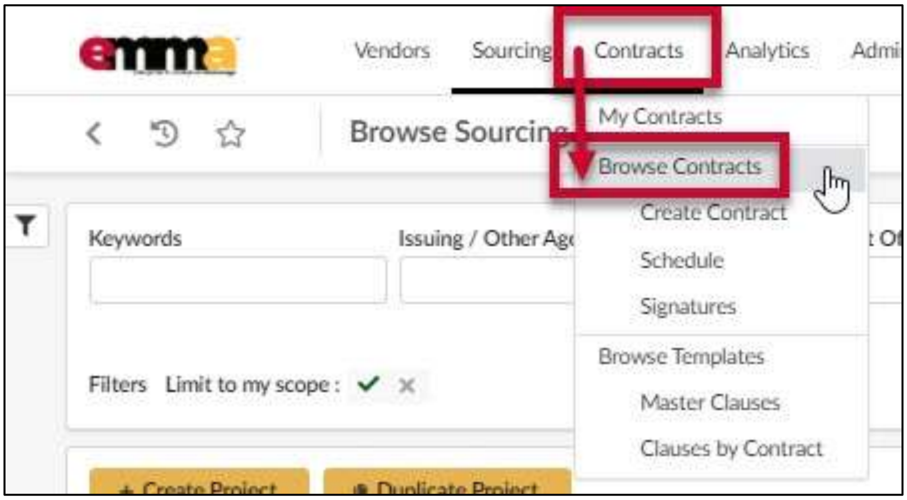

Figure 1: The Contracts tab and the Browse Contracts option.

3. Use the Search fields and filters to find your contract.
4. Click the Edit (pencil) icon to the left of the contract or blue links under the **Contract ID**, or **Contract Title** columns to open your contract in eMMA.

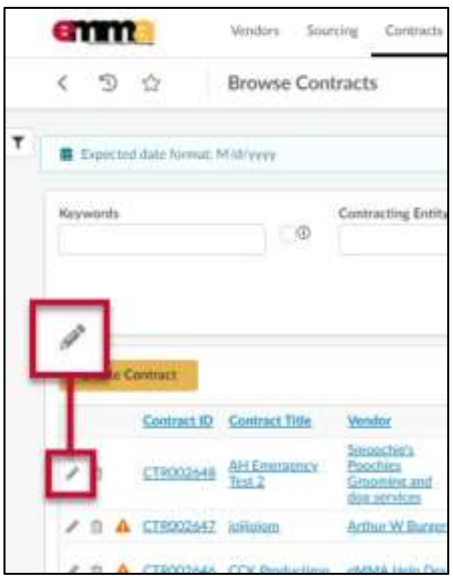

Figure 2: The Edit (pencil) icon for a contract in eMMA.

5. Click the **Launch Workflow** button at the top of the Contract window.

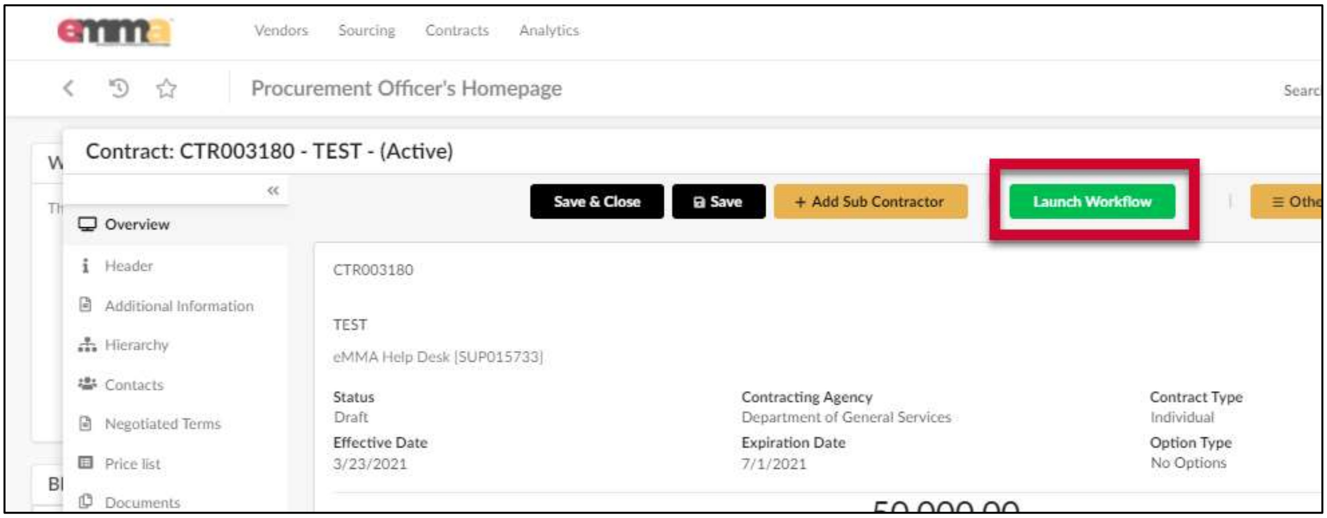

Figure 3: The Launch Workflow button for a Contract in eMMA.

6. Click the **Workflow** tab on the left-hand side-panel and click the **DocuSign** button at the top of the webpage to initiate the DocuSign portion of the Workflow.

   NOTE: The electronic signature (DocuSign) process must happen in tandem with the contract approval process. This means that when one signee signs the document, the Procurement Officer must move the workflow forward for the next signee.

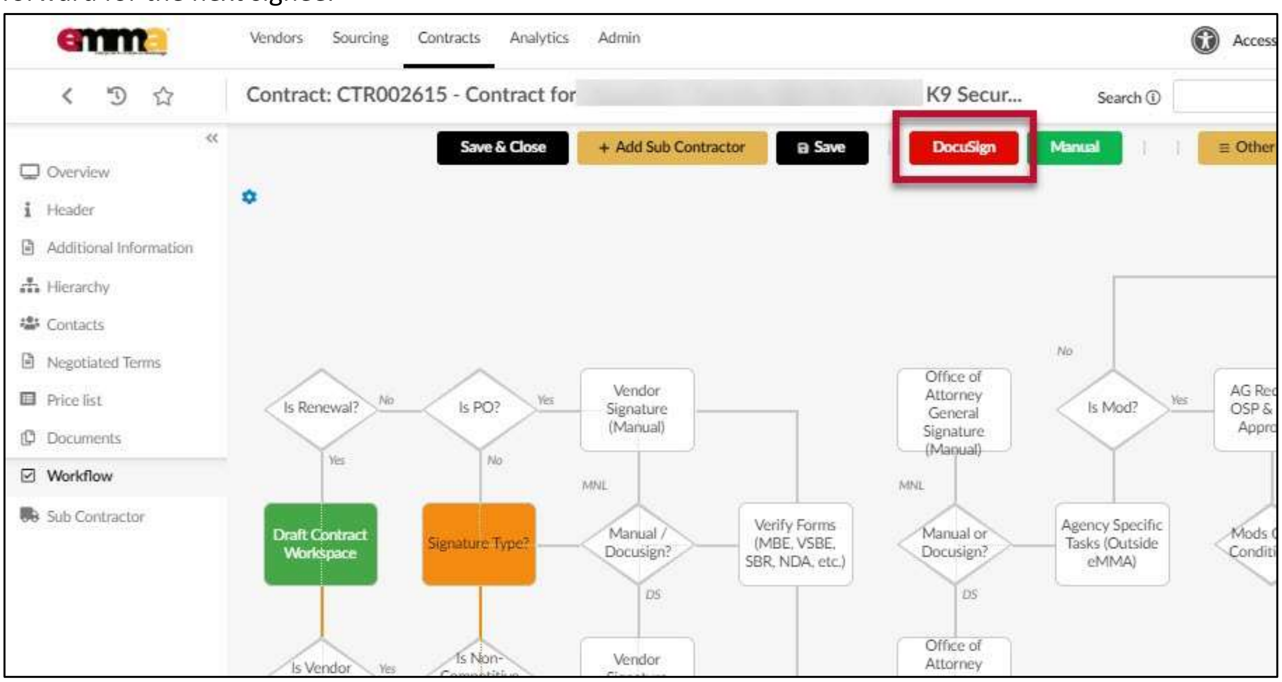

Figure 4: The DocuSign button in eMMA.

7. Select the **Documents** tab from the left-hand side-panel.

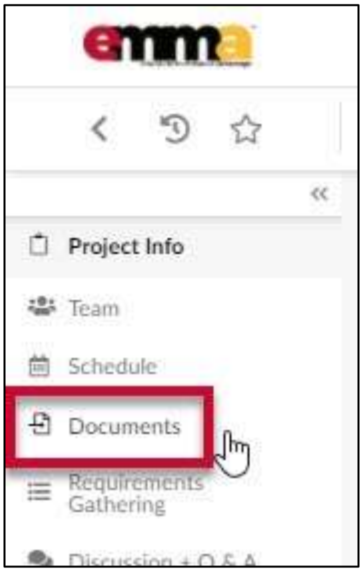

Figure 5: The Documents tab in the left-hand side-panel.

8. Click the checkbox(es) to the left of the uploaded contract document(s) you wish to put through DocuSign. You can select one, or more documents to sign if both documents need to be signed by the same signees. When you select two documents, as this process does, DocuSign treats them as one document and has the signees sign both documents seamlessly at the same time.

   NOTE: These instructions follow selecting two (multiple) documents to be signed in DocuSign.

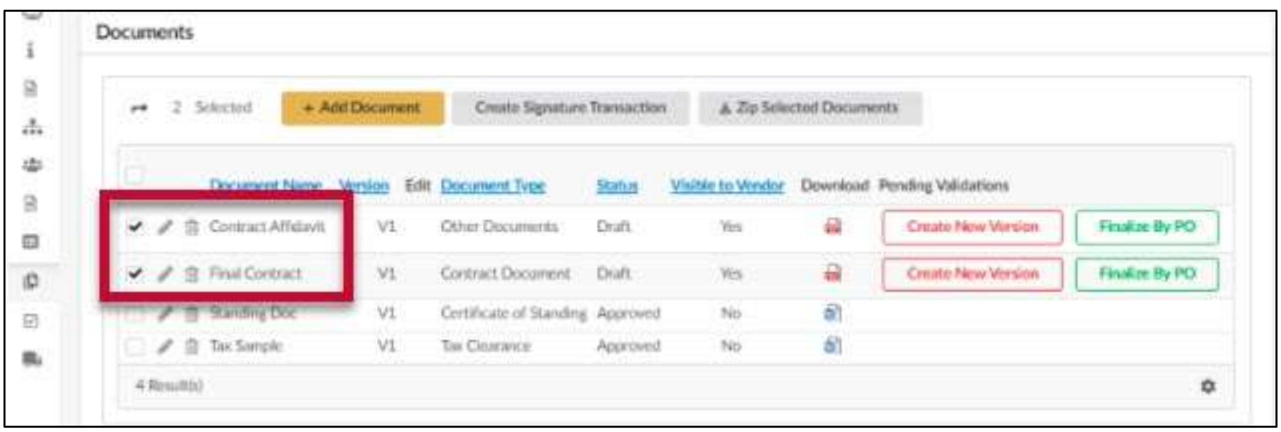

Figure 6: Two selected contract documents uploaded in eMMA.

9. Click the **Create Signature Transaction** button above the list of uploaded documents. DocuSign opens a new browser window.

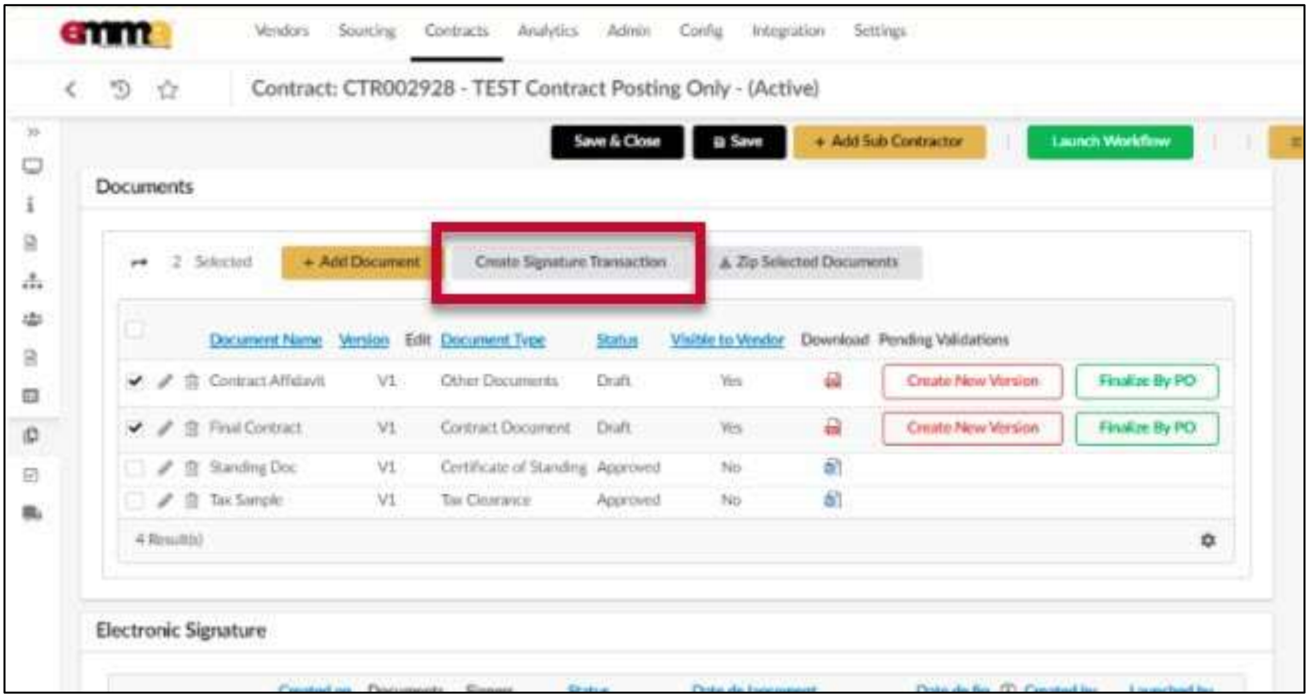

Figure 7: The Create Signature Transaction button.

Set Up Signees for the Contract Document in DocuSign

This process shows you how to set up your document(s) to be signed by your signees. It demonstrates setting up fields for signatures, initials, and date signed in the document(s) for the signee to sign. It continues from the last step in the previous process.

NOTE: You should only need to complete Steps 10-12 once.

10. In the new window, click the **Electronic Record and Signature Disclosure** link on the left side of the page and read the advisory, if necessary, and click the **X** in the corner of the disclosure to close it.

Figure 8: The Electronic Record and Signature Disclosure link.

11. Select the checkbox below that link to indicate that you agree to the terms and conditions.

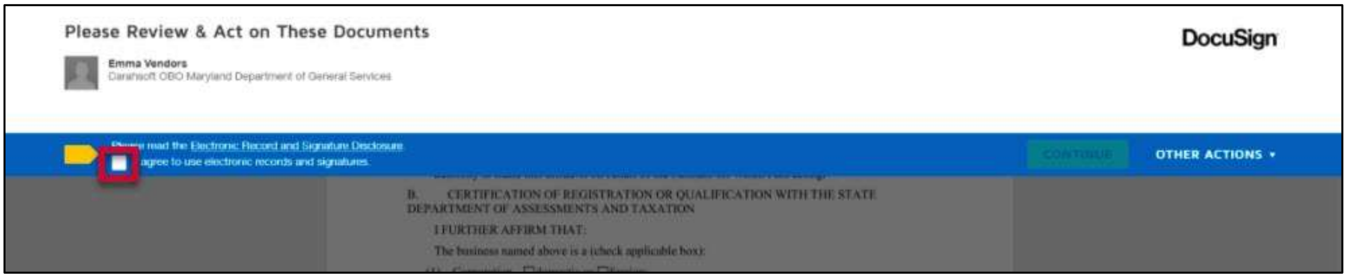

Figure 9: The checkbox to agree to the terms in the Disclosure.

12. Click the **Continue** button that displays on the upper right side of the page. The DocuSign window now displays the first page of your loaded documents.

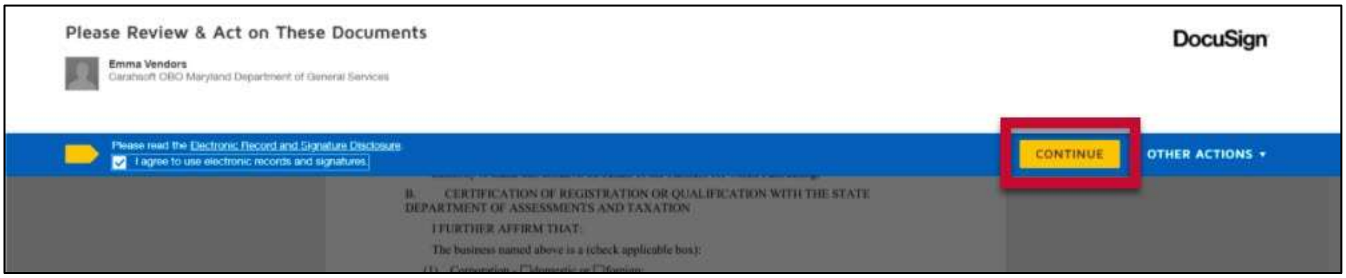

Figure 10: The Continue button in DocuSign.

13. Click the **Add Recipients** button in the upper left-hand corner of the page. The **Edit Recipients** window opens.

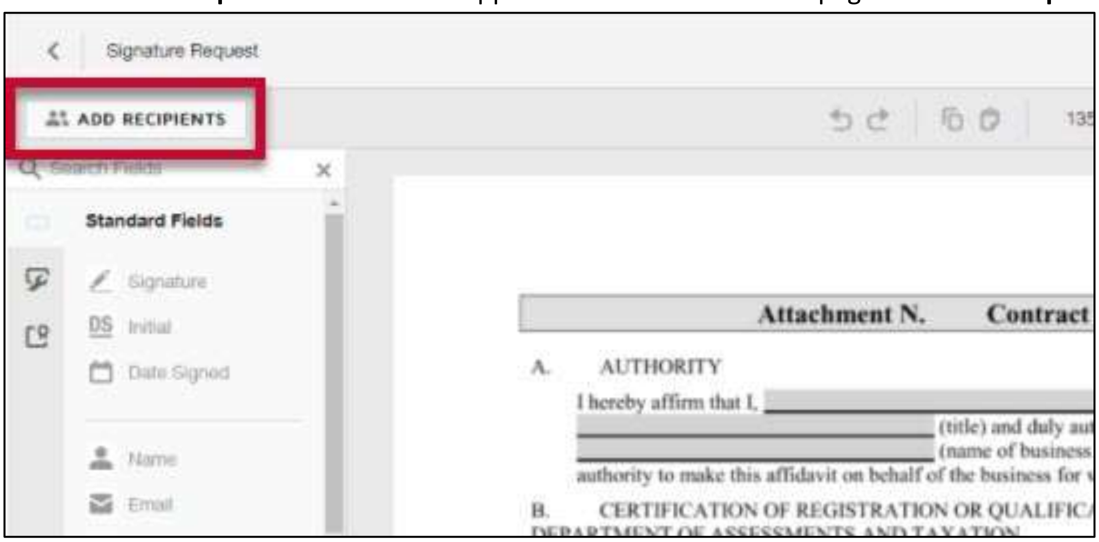

Figure 11: The Add Recipients button in DocuSign.

14. Select the checkbox for **Set Signing Order** on the left side of the Edit Recipients window. This enforces the consecutive order in which the signees sign the document.

Figure 12: The Set signing order checkbox.

15. Enter the signee name and email address in the **Name** and **Email** fields, respectively. A red asterisk indicates a required field.

    NOTE: By default, each user you enter here is set to sign the document. Note that the action to the right of the name says "Needs to Sign".

Figure 13: The Name and Email fields for a signee.

16. Click the **+ Add Recipients** button at the bottom of the Edit Recipients window to add more signees.

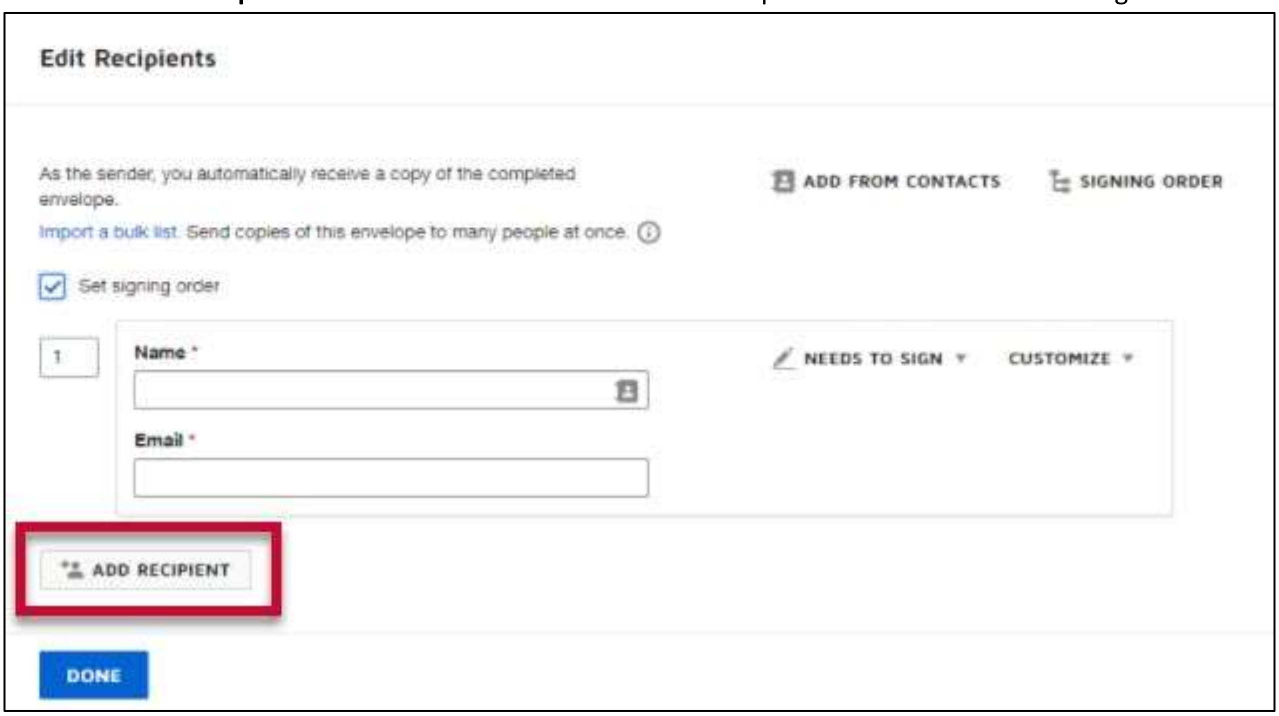

Figure 14: The Add Recipient button.

17. (Optional) To send yourself a copy after each signee completes the document, follow these steps:
    a. Enter your name and email address in the **Name** and **Email** fields, respectively.

b. Click the **Needs to Sign** option to the right of your information to open the drop-down menu and select the **CC Receives a Copy** option.

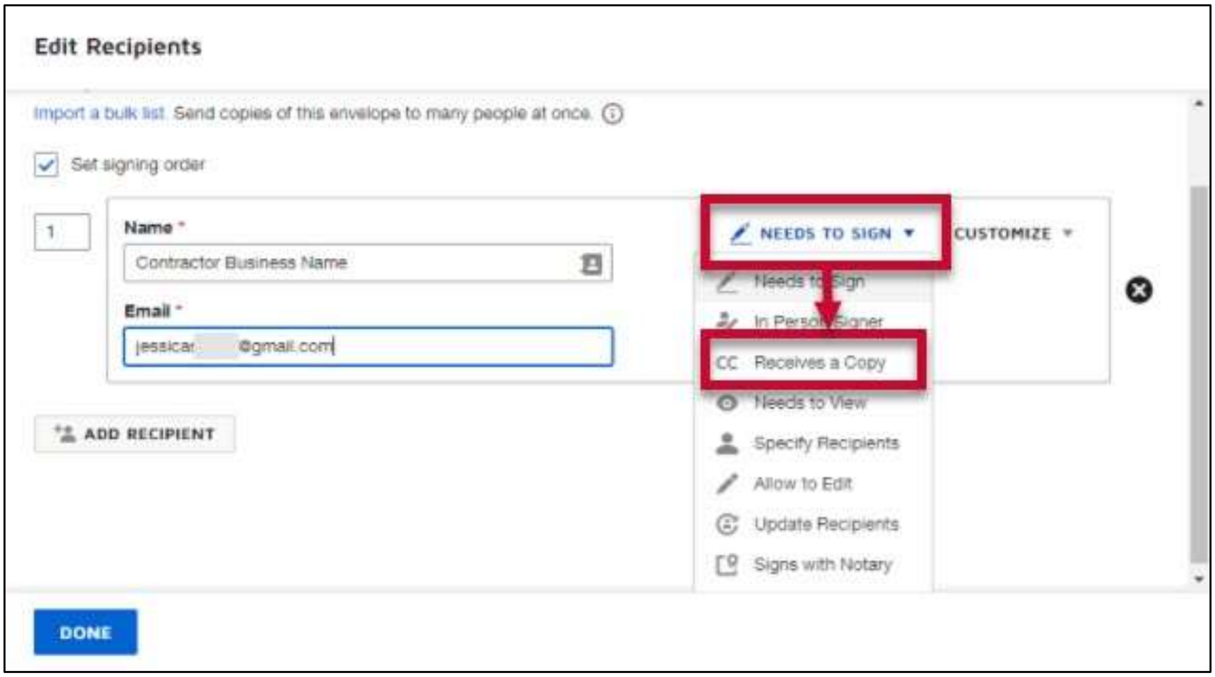

Figure 15: The Needs to Sign drop-down menu and the Receives a Copy option.

c. Repeat Steps 16a-16b **after** entering and assigning the **Needs to Sign** action to each signee**.**

18. Repeat Steps 15-16 as many times as necessary until all signees are listed and assigned the **Need to Sign** action. The number to the left of the recipient's information indicates their position in the order of signing.
19. Click the blue **Done** button at the bottom of the Edit Recipients window.

Designate Areas in the Contract Document for the Signees to Sign

This process continues from the last step in the previous process.

Now that you have the signees assigned and ordered, you can start creating target fields in the document for signees to sign. When finished, DocuSign will guide each signee in order through the target fields in which you want them to sign. This process shows you how to create those assigned target fields that tell the signee where to sign, initial, or include the date.

20. (Optional) To save your document and come back to it later, click the **Actions** button in the upper right-hand corner to open the drop-down menu, and select the **Save and Close** option.

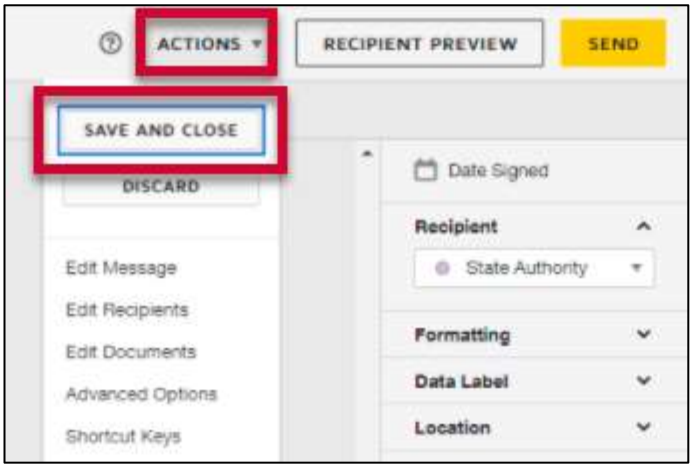

Figure 16:The Actions button and the Save and Close option.

21. In the Standard Fields section on the left-hand side-panel, click the **Signature**, **Initials**, or **Date Signed** option and click the first spot, or target area, on which you need one of those options completed.

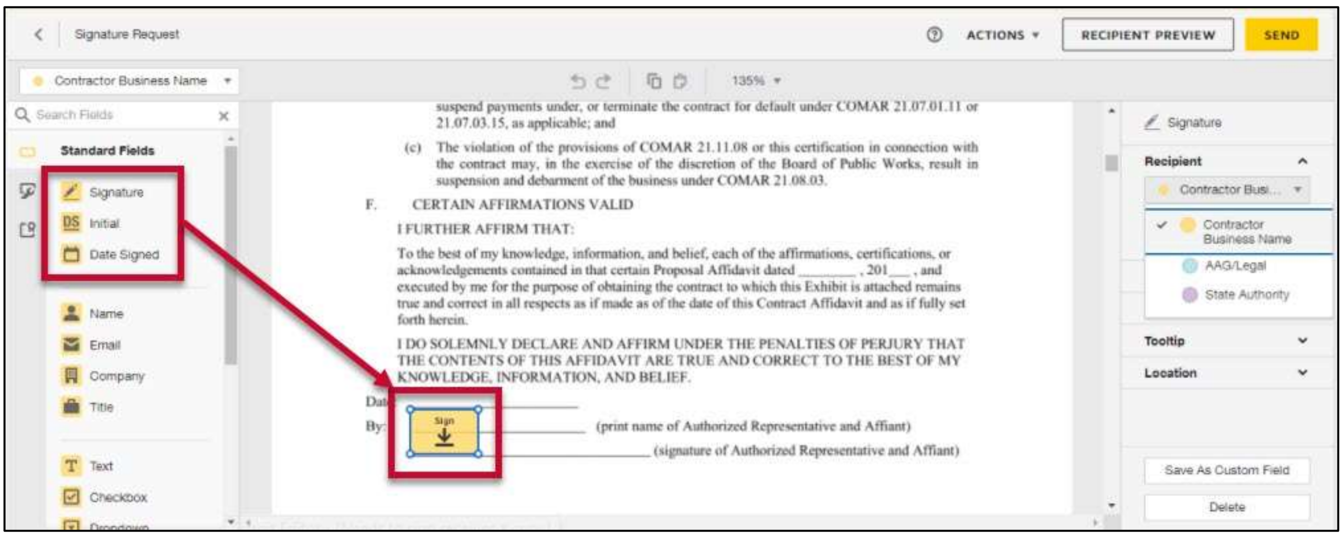

Figure 17:The Standard Fields and a target area for a signature.

22. Click the **Recipients** drop-down menu on the right-hand side of the window and select the signee you want to sign that target area. Each signee you added is assigned a color that corresponds with the target area in which they sign, initial or date the document. Once you select the signee from this list, the target area changes to the

color of that signee.

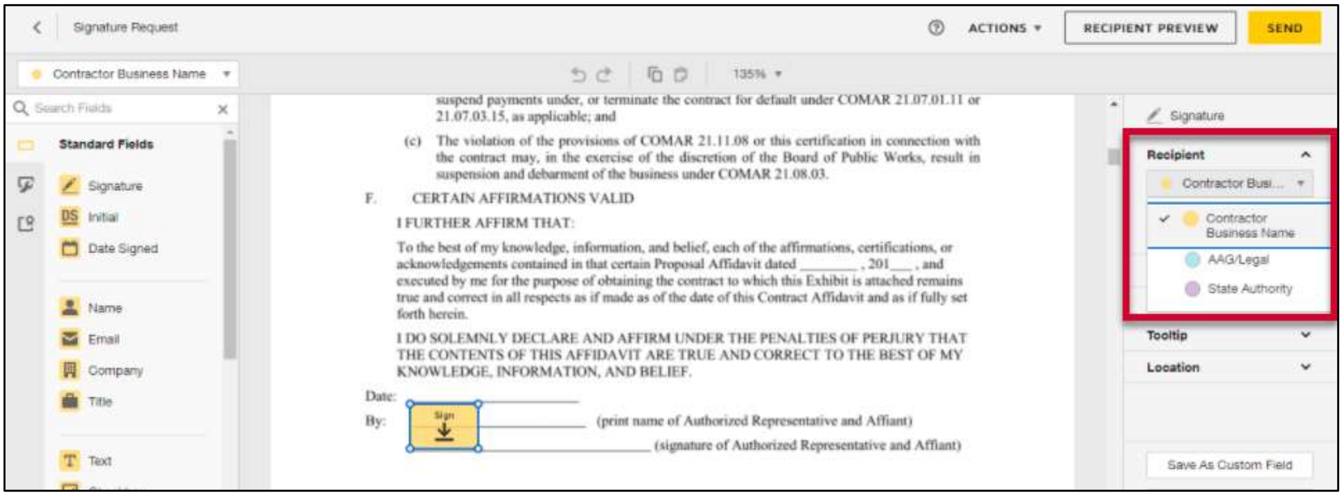

Figure 18: The target area and the corresponding recipient selected.

23. Repeat Steps 20-21, as necessary, until all target areas have been created and assigned to the appropriate signees.
24. (Optional) If you want to see this document the way that your signee will see it, click the **Recipient Preview** button in the upper right-hand corner.

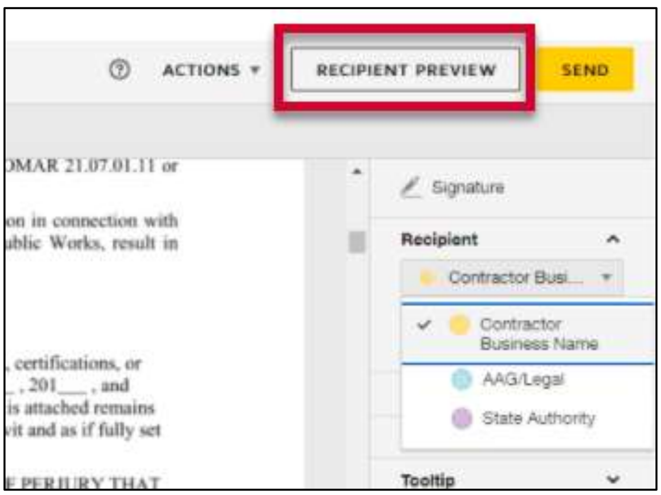

Figure 19: The Recipient Preview button.

a. Click the **Viewing As** field in the upper left-hand corner and select a specific signee from the drop-down menu to see how he/she sees the document. A checkmark indicates the selected signee.

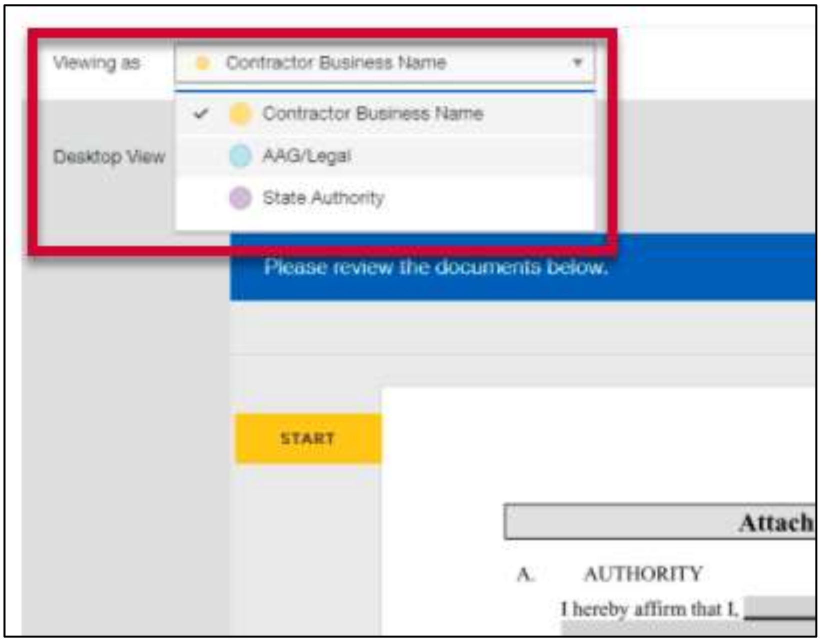

Figure 20: The Viewing as drop-down menu and a selected signee.

b. Click the **X** in the upper right corner of the preview to close.

25. When you have finished adding signatures, initials, and dates signed for all the signees, click either **Send** button in the upper or lower right-hand corners of the webpage. The first signee receives an email from DocuSign about the document. This starts the actual signing process by the signees. Once the first signee finishes, the Procurement Officer must log out and log back in to eMMA and then click the button that moves the workflow forward to the next point. DocuSign then notifies the next signee to sign it, via email.

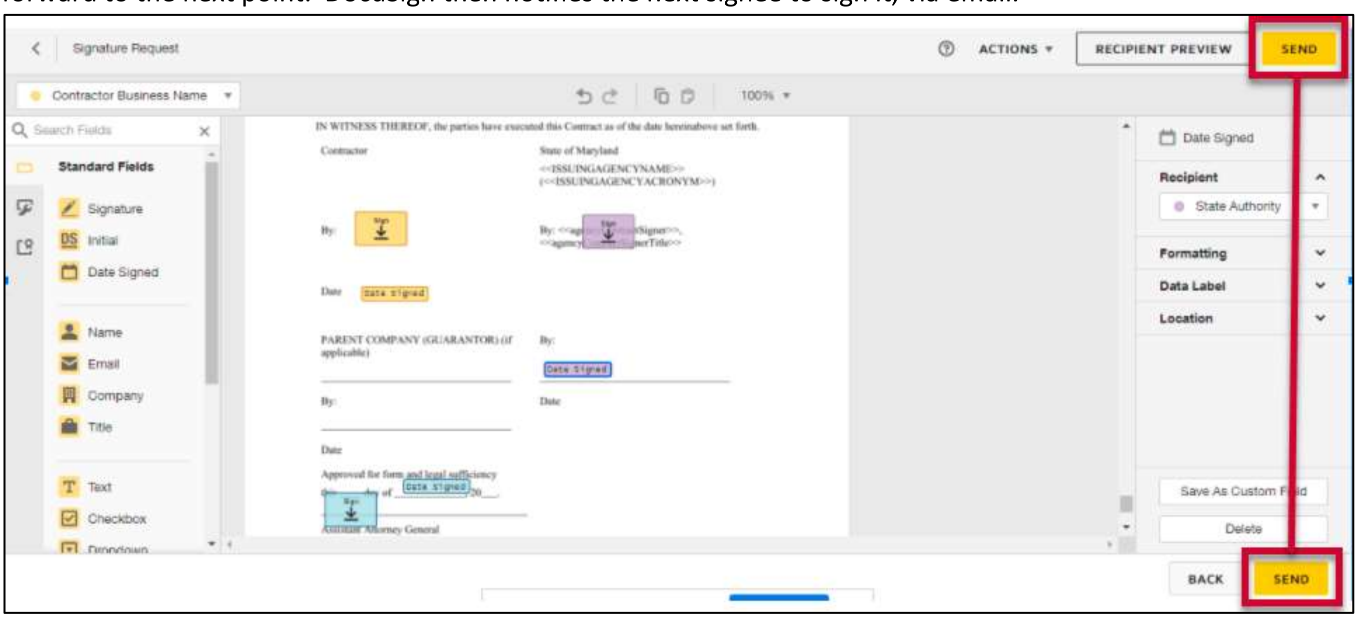

Figure 21: The Send buttons in DocuSign.

IMPORTANT: The Procurement Officer must log out and log back in to eMMA and then click the button that moves the workflow forward to the next point. That button changes depending on who the signee is and what the step is. For example, after the Vendor signs the document, the Procurement Officer navigates to the Contract Workflow in eMMA and clicks the Vendor Execute button at the top of the eMMA webpage. No communication is sent within eMMA as the document's signatures progress, but it is crucial to move the contract approval workflow forward. Once the document is signed and complete, all signees get an email from DocuSign with the fully signed copy. The Procurement Officer should monitor and shepherd the forward movement of the contract approval workflow, including communicating with signees to perform their task in a timely manner.

Checking the Signature Progression in eMMA

This step continues from the last step in the previous process.

26. Navigate to the Contract in eMMA, if necessary.
27. Click the **Documents** tab on the left-hand side-panel.
28. In the **Electronic Signature** section, click the **Refresh** icon to the left of the contract document to refresh the document status.

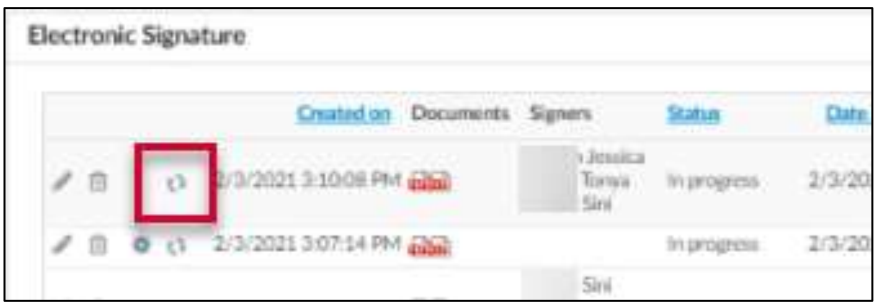

Figure 22: The Refresh icon in eMMA.

29. Click the **Edit** (pencil) icon in eMMA next to the document(s) to see its progress. The Signature Transaction Page opens. The **Signatories (in order of processing)** section shows you who signed and when. You will see green checkmarks next to document icons In the **ID** column for each signee that has signed. The **Status** column lets you see if that step is complete.

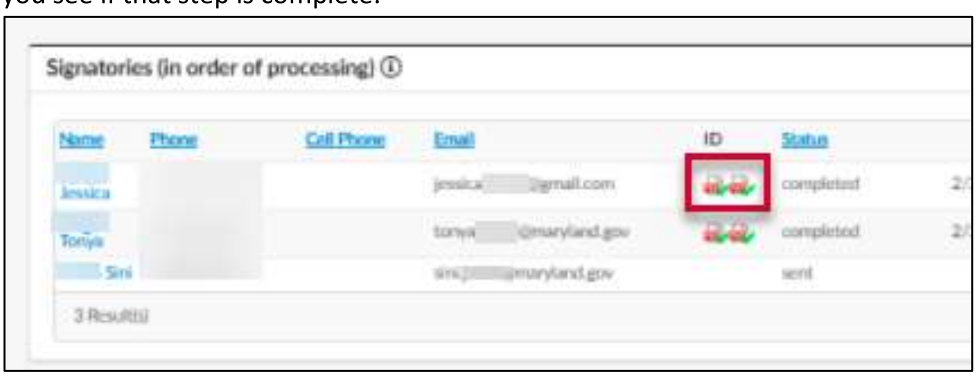

Figure 23: The green checkmarks next to document icons in the ID column.

Finalizing the Completed Document in eMMA

This step continues from the last step in the previous process. You will receive an email copy of the final document from DocuSign once everyone has signed. These steps show you how to complete the process of finalizing the Contract Document(s) in eMMA and publishing the Contract.

30. When the document has been completed, the Procurement Officer receives a final email regarding the document. Open the DocuSign email with the final document signed by the designated signees, and click the **View Completed Documents** button in the email.

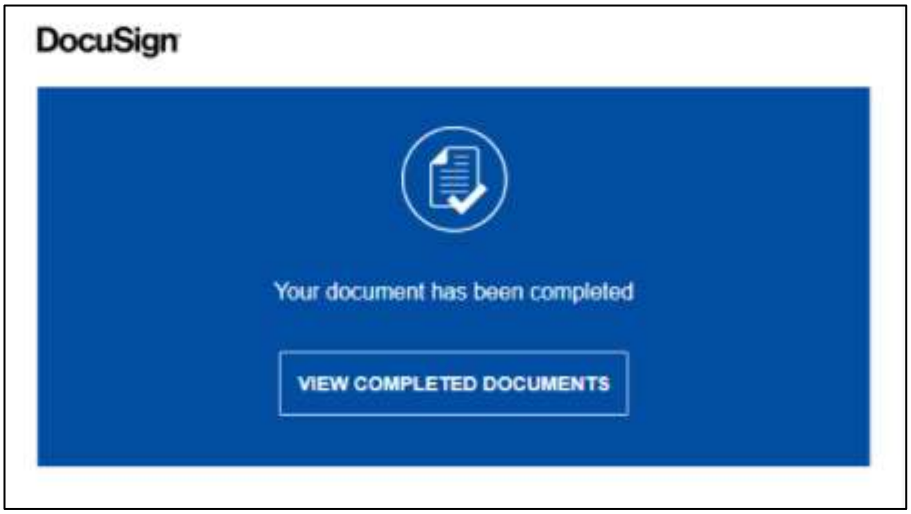

Figure 24: The View Completed Documents button in the DocuSign email.

31. Click the **Download** (downward arrow) icon above the document to open the drop-down menu. Here, you can choose to keep the documents together or apart.

Figure 25: The Download icon and the options menu.

c. Click the **Combined PDF** option to keep the multiple documents as one document.
d. Click the **Separate PDF** option to separate the documents.

NOTE: If you chose to separate the completed documents, you must finalize **each signed document** in eMMA before you publish.

32. Return to eMMA and locate your contract.
33. Click the **Documents** tab and click the **Refresh** icon to the left of the document in the Electronic Signature section. If the document has all signature sets completed, you will see a check mark symbol on the document icon.

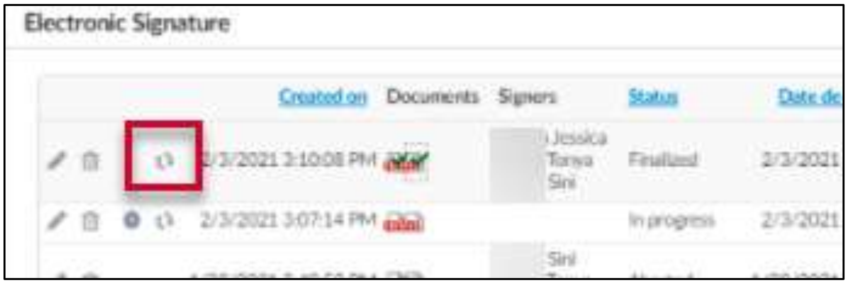

Figure 26: The Refresh icon for a document in eMMA.

NOTE: It is recommended that the completed version(s) of your DocuSign document(s) be added to the General Documents section for visibility.

e. Download the final-signed version of the document(s) by clicking on the check-marked document icon and saving the file to your computer.

Figure 27: The document with checkmarks icon in eMMA.

34. Click the Edit (pencil) icon to the left of **original unsigned** document in the **Documents** section (above the Electronic Signature section). A new window opens.

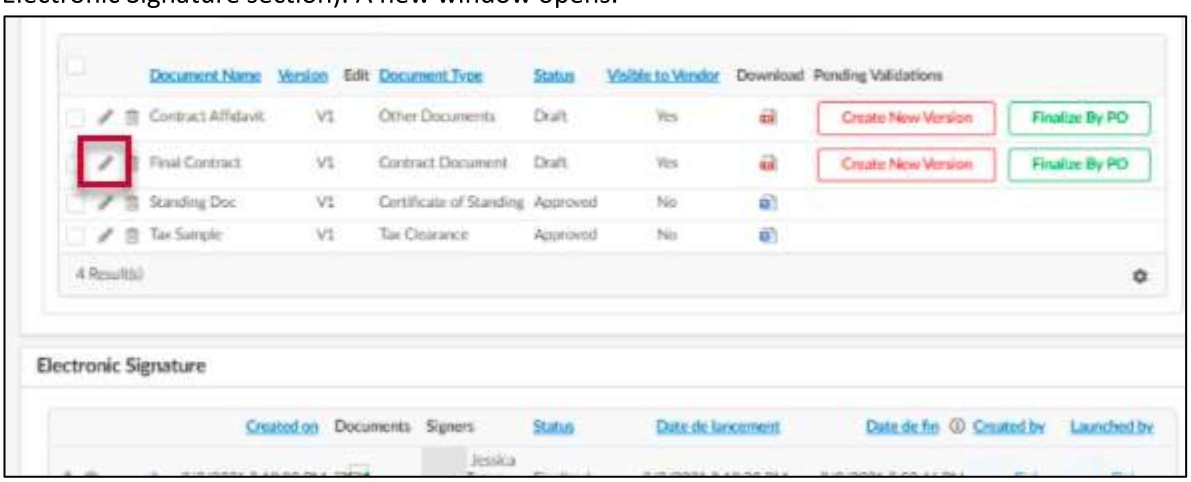

Figure 28: The Edit icon for a document in eMMA.

35. Enter the appropriate information in the fields and upload the final DocuSign document that you downloaded to your computer in Step 33a.
36. Click the **Save & Close** button at the top of the Documents pop-up window.
37. Click the **Finalize By PO** button to the right of the completed Contract Document. A prompt opens, click **OK**.

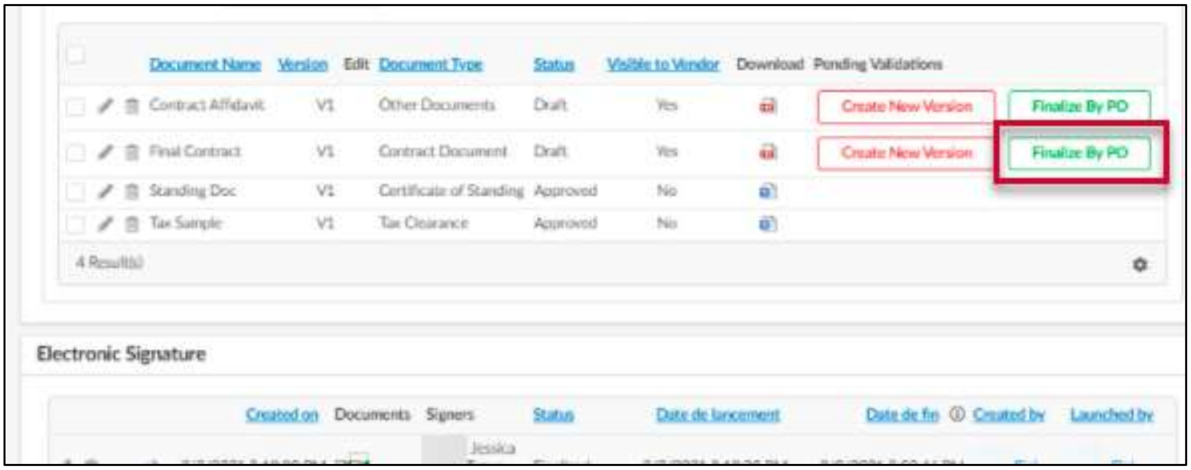

Figure 29: The Finalize By PO button in eMMA.

38. Click the **Workflow** tab in the left-hand side-panel and click the **Publish** button at the top of the page.

NOTE: Once you click the Publish button, the contract record in eMMA is locked and any changes (data fields, or docs) can only be edited by creating a modification.

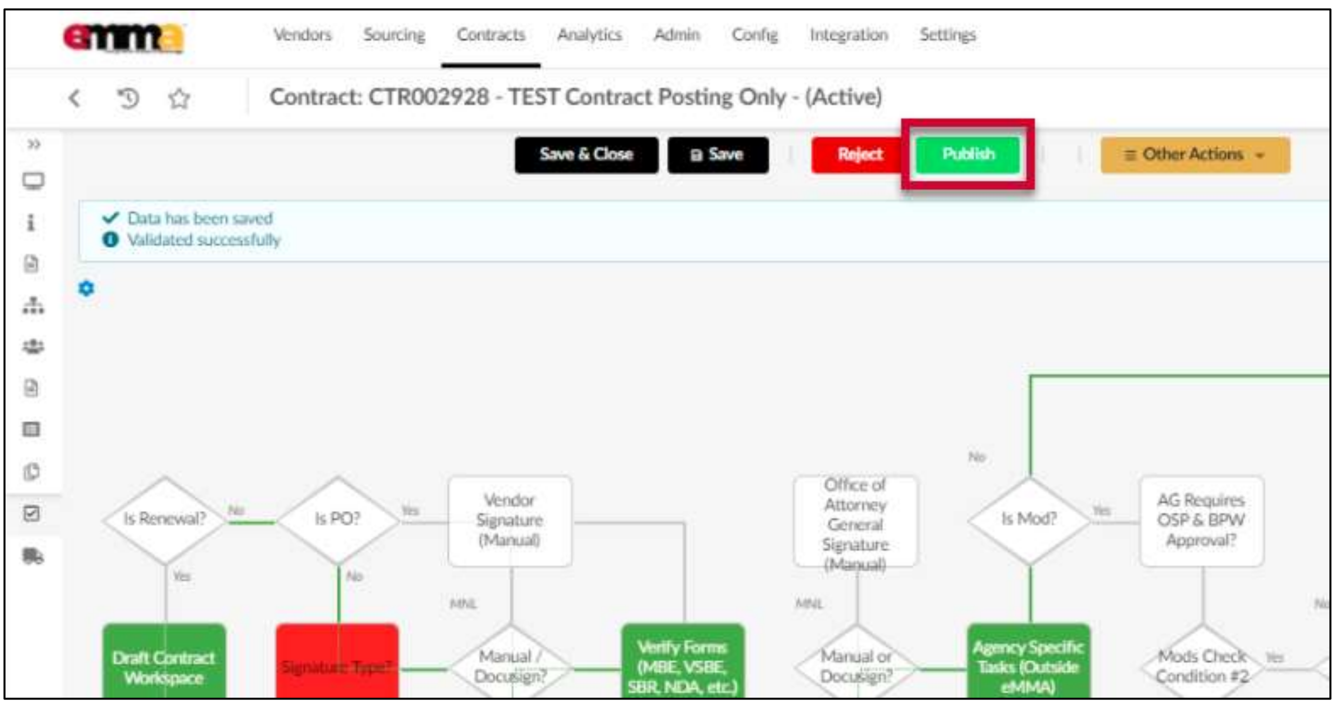

Figure 30: The Publish button in the Workflow tab.