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## Doing Business with DCF: Using DocuSign

The Department of Children & Families (DCF) has implemented a process for routing and signing contracts electronically using the DocuSign process. Agencies do not have to wait for a paper contract to arrive in the mail; the designated signer for the agency will receive notification via email, where the contract will be available to be reviewed and signed, then submitted back to DCF through the DocuSign website. The agency may print or save a PDF copy of the contract. At the conclusion of the electronic signing process, a fully-signed copy of the contract will be sent to all signers and people designated to receive a copies (CC's). ***Please note someone must be designated to electronically sign the contract; DCF must have a DocuSign signature. The DCF Bureau of Finance will not accept PDF or paper contracts submitted outside of the DocuSign process.***

Agencies will confirm the designated signer of the contract with their DCF Bureau of Regional Offices Area Administrators 45 days prior to the start of the contracts routing for signature. Agencies will also have the opportunity to identify any other persons, such as agency directors, fiscal managers, and attorneys, who may copied on the emails sending out the contract. ***Only one "signable" version of the contract will be sent out, and only to the person who the Agency designates as their authorized signer. All other copies will be "read-only".***

The contract documents are converted, saved, and routed electronically in PDF format. The following describes the process:

- 1) The authorized signer receives an email from DocuSign, asking them to agree to do business with DCF electronically.
- 2) After accepting the terms, the contract opens in DocuSign displaying the documents with "eTabs" identifying the location(s) for the person to sign. This allows only the specified signatory to sign in the appropriate location(s) in the document. If the contract must be signed by someone other than the person receiving the notification, it may be forwarded to the correct person in DocuSign.
- 3) After "signing", the contract is automatically forwarded to the next signer.
- 4) Once the contract has been completely routed and all required signatures confirmed, a complete, signed contract is sent back to all signers and any others CC'd in the process. Contracts are saved and archived in DCF's electronic filing system, and the Agency may download and save as many copies of the fully signed version as they wish.

### **Suggested steps to prepare for electronic routing:**

**Watch the Video.** There is a helpful video showing the entire signing process:

<https://support.docusign.com/en/videos/New-Signing-Experience>

**Know who your authorized signer is.** The designated signer is the only one who will be able to access the signable version. Everyone else will receive a copy when the signer is sent the envelope electronically. Once the signature is complete and submitted, everyone (including those identified to receive copies) will be sent a fully signed copy for their records.

**Know where the contract is coming from.** Occasionally, signers disregard the email message from DocuSign.net, and wait to receive something from “DCF Finance” or “Child Support” or a key specific person in DCF. All initial requests, CC’s, and reminders will come from DocuSign. **The sender’s name will usually be “DCF via DocuSign” and the address will be: dse@docusign.net.**

**Check your spam filter frequently.** If you think you are supposed to be included, the message may actually be in your spam box (depending on your spam filter or network settings.)

**“Whitelist” Docusign.net as a friendly domain.** Asking your IT support personnel to “whitelist”, or pre- approve DocuSign.net as a safe sender means any email you get requesting a signature or reminding you to view and sign a document makes it to your inbox smoothly.

**Check your screen resolution.** Sometimes when a signer’s screen resolution is set too low (ex. 800x600 pixels), the part of the message containing the link you must click to review the documents falls below the screen and cannot be seen. Setting your monitor to a higher resolution setting (such as 1280x1024 pixels) can help resolve this issue.

**Don’t be afraid to call with questions.** The DCF Contract Specialists are always willing to answer questions and help you problem solve. They may be reached at:

[Morris.Danielson@wisconsin.gov](mailto:Morris.Danielson@wisconsin.gov) (608) 422-6392

or

[CraigT.Jeranek@wisconsin.gov](mailto:CraigT.Jeranek@wisconsin.gov) (608) 422-6375