

DocuSign Guide

Participating providers receive an email when agreement documents are available to review and sign in DocuSign. This guide describes the steps necessary to review your documents, attach your signature or reassign agreement documents to the correct legal contract signatory if necessary.

You have the option to create a free DocuSign account for easy access to your agreement documents that require a signature, but it is not required

Important reminders

- You must be the legal contract signatory (duly authorized officer) for your tax ID for documents to be legally binding
- You cannot sign documents with the clinic name
- Do not change information or make marks other than signatures on the documents, or they will need to be reissued
- Do not forward emails received from DocuSign to other individuals for them to sign agreement documents
- Keep information about your tax ID legal contract signatory current by completing our [Electronic Contracting Registration form](#) when information changes

If you are not the legal contract signatory

If you receive an email from DocuSign to sign agreement documents that you are not the legal signatory for:

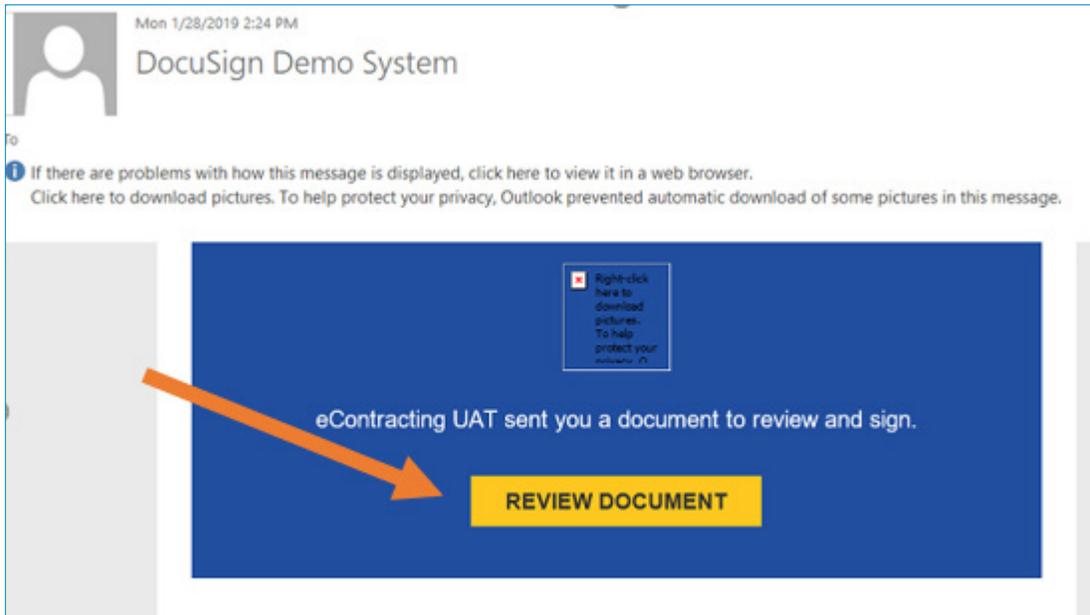
- You cannot forward emails received from DocuSign to another individual to sign the agreement
 - You can assign the documents to someone else from within the DocuSign application
- Update the legal contract signatory information for your tax ID for future contractual notifications by completing our [Electronic Contracting Registration form](#)

February 2022

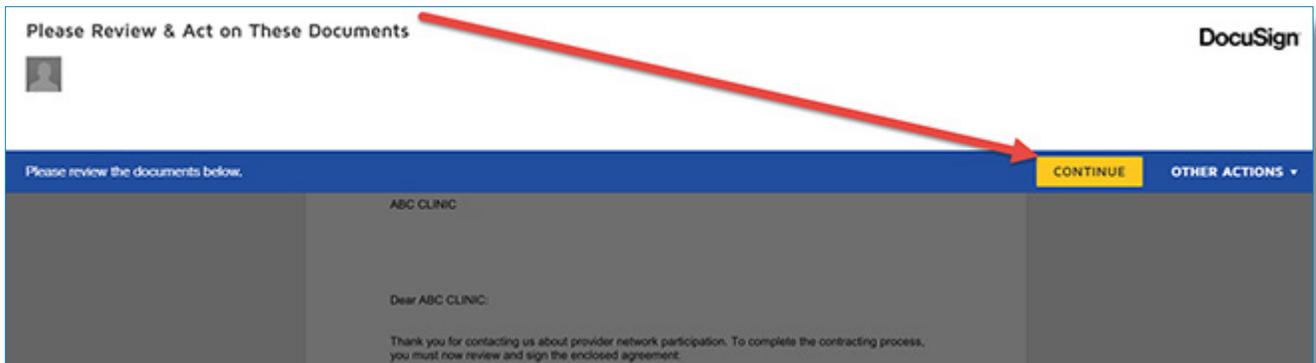


Signing agreement documents

1. Click the **Review Document** button in the body of the email to begin.



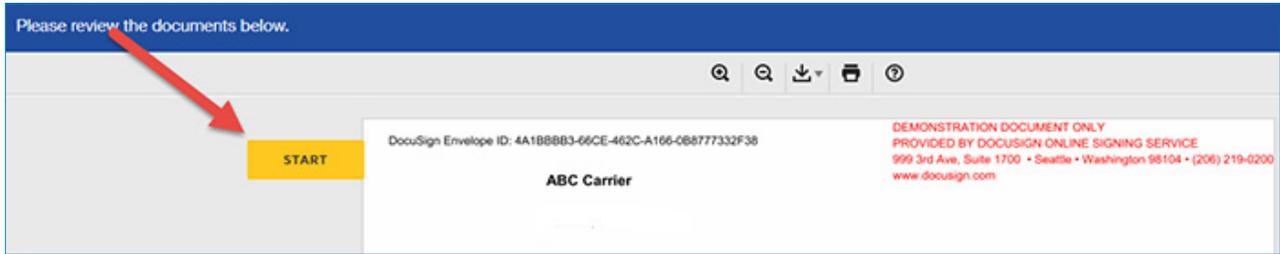
2. Click **Continue** on the right side of the window that opens.



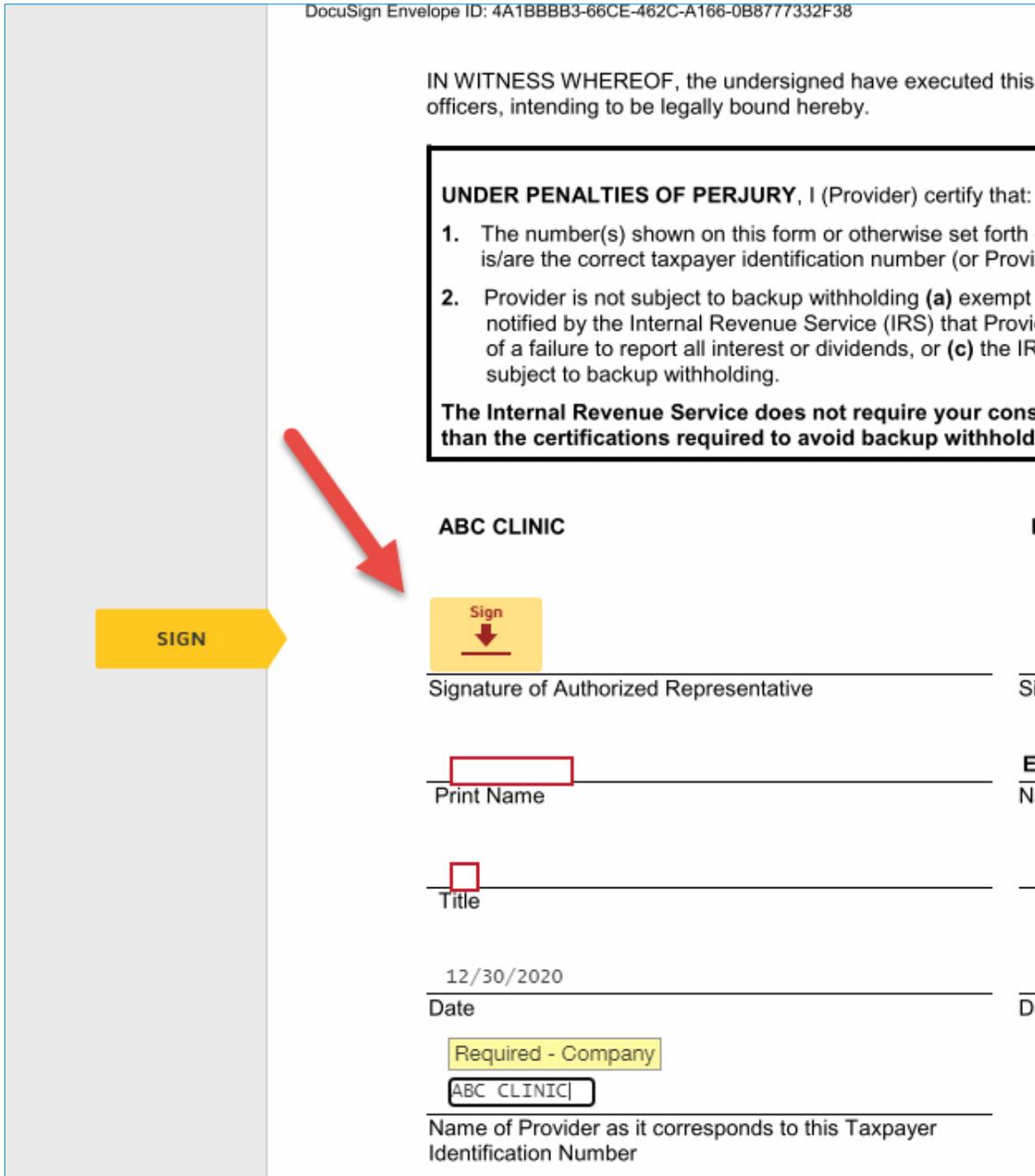
Documents cannot be signed with the clinic name

Emails from DocuSign cannot be forwarded to another individual for electronic signature

3. Once you have reviewed the entire document, click **Start** to begin the signing process.



4. DocuSign will indicate all areas of the agreement where a signature is required. Click each



- Review your information and choose a signature. You may choose a pre-defined signature or create your own.

Using a pre-defined signature

Click **Select Style** and then **Change Style**.

Adopt Your Signature

Confirm your name, initials, and signature.

* Required

Full Name* Jane Doe **Initials*** JD

SELECT STYLE DRAW UPLOAD

PREVIEW Change Style

DocuSigned by: Jane Doe 6A9E370AE9954B9... DS JD

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 - just the same as a pen-and-paper signature or initial.

ADOPT AND SIGN CANCEL

You may then select from several pre-defined styles.

Adopt Your Signature

Confirm your name, initials, and signature.

* Required

Full Name* Jane Doe

SELECT STYLE DRAW UPLOAD

PREVIEW

DocuSigned by: Jane Doe 6A9E370AE9954B9... DS JD

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 - just the same as a pen-and-paper signature or initial.

ADOPT AND SIGN CANCEL

DocuSigned by: Jane Doe 6A9E370AE9954B9... DS JD

Creating a custom signature

You can create your own signature by drawing it with your mouse. Select **Draw**, place your cursor in the **Draw Your Signature** field, and draw it.

Adopt Your Signature

Confirm your name, initials, and signature.

* Required

Full Name* **Initials***

SELECT STYLE **DRAW** UPLOAD

DRAW YOUR SIGNATURE



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 - just the same as a pen-and-paper signature or initial.

ADOPT AND SIGN CANCEL

Do's and Don'ts

- Do carefully review all agreement pages
- Do sign agreement documents as soon as notified
- Do keep your office legal signatory information current
- Don't forward DocuSign emails to others
- Don't sign with the clinic name
- Don't make any edits or changes: This will invalidate the agreement and a new one will need to be sent

Documents cannot be signed with the clinic name

Emails from DocuSign cannot be forwarded to another individual for electronic signature

- Review the signature full name and initials. If this information is not correct, place your cursor in the **Full Name** and **Initials** sections and enter the correct information. **Note:** Documents must be signed by an authorized officer within your group to be legally binding. **They cannot be signed with the clinic name.**
- Click the **Adopt and Sign** button to attach your signature.

Adopt Your Signature

Confirm your name, initials, and signature.

* Required

Full Name* **Initials***

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

PREVIEW Change Style

DocuSigned by:  DS 
6A9E370AE9954F...

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 - just the same as a pen-and-paper signature or initial.

ADOPT AND SIGN CANCEL

- The selected signature will be applied to the document signature page.

Required - Signature Applied

DocuSigned by: 

Signature of Authorized Representative

9. Enter your name, title and name associated with the tax ID for this agreement.

DocuSigned by:
Jane Doe, CFO
Signature of Authorized Representative

Jane Doe
Print Name

CFO
Title

12/30/2020
Date

ABC CLINIC
Name of Provider as it corresponds to this Taxpayer Identification Number

10. Click **Finish** to finalize the signing process.

Done! Select Finish to send the completed document.

2. Provider is not subject to backup withholding (a) exempt from backup withholding, or (b) has not been notified by the Internal Revenue Service (IRS) that Provider is subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified Provider that it is no longer subject to backup withholding.
The Internal Revenue Service does not require your consent to any provision of this document other than the certifications required to avoid backup withholding.

ABC CLINIC

DocuSigned by:
Jane Doe, CFO
Signature of Authorized Representative

Jane Doe
Print Name

CFO
Title

12/30/2020
Date

ABC CLINIC
Name of Provider as it corresponds to this Taxpayer Identification Number

Taxpayer Identification Number

Email Address

FINISH

11. You will be asked if you want to log into your DocuSign account. Click **No Thanks** and you will automatically receive a fully signed and executed copy of your agreement via email within 10 minutes.

Log in to DocuSign

A copy of this document has been saved to your DocuSign account. Please log in to view it.

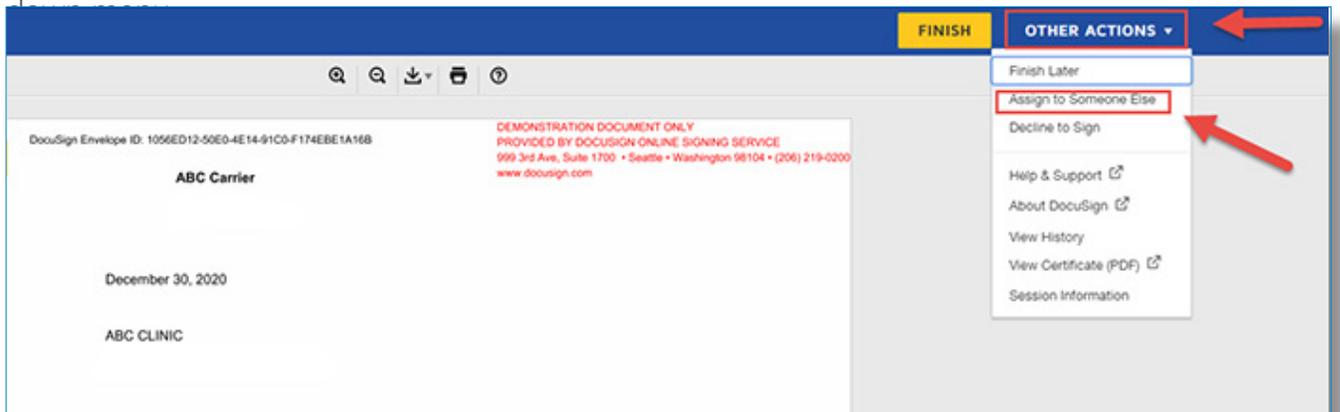
Email

LOG IN NO THANKS

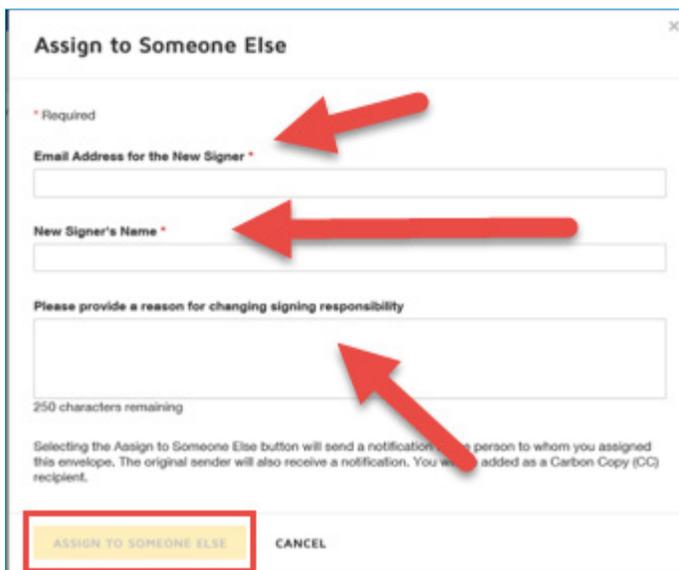
Reassigning agreement documents

If you receive agreement documents via email from DocuSign for which you are not the legal contract signatory, you will need to assign the task to the correct individual from within the DocuSign application. Only the original recipient of the email can access and sign agreement documents. You cannot forward the email for this purpose.

1. In the DocuSign application, select **Assign to Someone Else** from the **Other Actions** drop-



2. Add the New Signer's email address and name and provide a reason for changing the signing responsibility to someone else. To complete the process, click **Assign to Someone Else**.

A screenshot of the 'Assign to Someone Else' form. The form has a title bar with a close button. It contains three required fields: 'Email Address for the New Signer', 'New Signer's Name', and 'Please provide a reason for changing signing responsibility'. The text area for the reason has a '250 characters remaining' indicator. At the bottom, there are two buttons: 'ASSIGN TO SOMEONE ELSE' (highlighted with a red box) and 'CANCEL'. Red arrows point to each of the three input fields.

Technical assistance

- Review our recontracting [frequently asked questions](#)
- Complete the [technical support form](#)

Replacing or correcting a signature

Follow these steps if DocuSign has attached the wrong signature to your agreement or you need to change your signature.

1. If DocuSign does not produce the **Adopt and Sign** dialogue box when **Sign Here** is clicked, place your mouse cursor above the signature and **left-click**. A menu will allow you to change or clear the signature. Select **Change**.

The screenshot shows a DocuSign document interface. At the top, a blue bar contains the text "Done! Select Finish to send the completed document." and two buttons: "FINISH" and "OTHER ACTIONS". Below this is a toolbar with icons for search, zoom, download, print, share, and help. The document content includes a DocuSign Envelope ID, a red warning about a demonstration document, and a section titled "UNDER PENALTIES OF PERJURY, I (Provider) certify that:". Below this, there are two columns for signatures. The left column is for "BLUE LAKES CHIROPRACTIC PA" and the right for "REGENCE BLUESHIELD OF IDAHO". The left signature area shows a signature for "ABC Clinic" with a red arrow pointing to it. A menu is open below the signature with "Change" and "Clear" options. The "Change" option is highlighted with a red box.

2. In the **My Signature and Initials** dialogue box, select **+ADD**.

The screenshot shows the "My Signatures and Initials" dialogue box. It has a title bar with a close button. Below the title, there is a "+ ADD" button highlighted with a red box. Below that, there is a list of signatures. The first signature is for "ABC Clinic" and is selected with a radio button. To the right of the signature name, there is a preview of the signature "ABC Clinic" and a preview of the initials "ABC". Below the signature name, there is a DocuSigned ID: "0680E49486F240F...". To the right of the initials, there is an "Edit" button and a close button. At the bottom, there are two buttons: "ADOPT" and "CANCEL".

3. The **Adopt Your Signature** dialogue will open.

Adopt Your Signature

Confirm your name, initials, and signature.

* Required

Full Name* **Initials***

SELECT STYLE DRAW UPLOAD

PREVIEW [Change Style](#)

DocuSigned by: *ABC Clinic* DS *ABC*
0689E49466FB40F...

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 - just the same as a pen-and-paper signature or initial.

ADOPT AND SIGN CANCEL

4. Enter the correct name and initials, confirm the signature preview then select **Adopt and Sign**.

Adopt Your Signature

Confirm your name, initials, and signature.

* Required

Full Name* **Initials***

SELECT STYLE DRAW UPLOAD

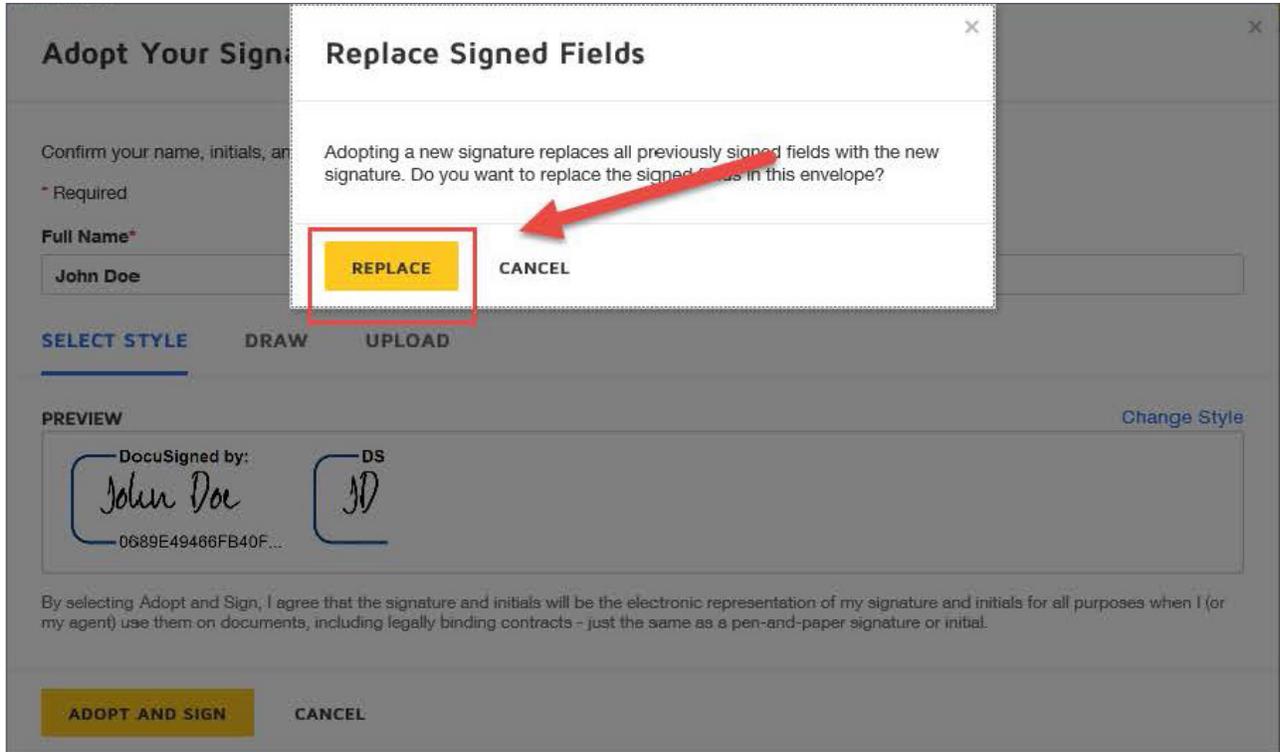
PREVIEW [Change Style](#)

DocuSigned by: *John Doe* DS *JD*
0689E49466FB40F...

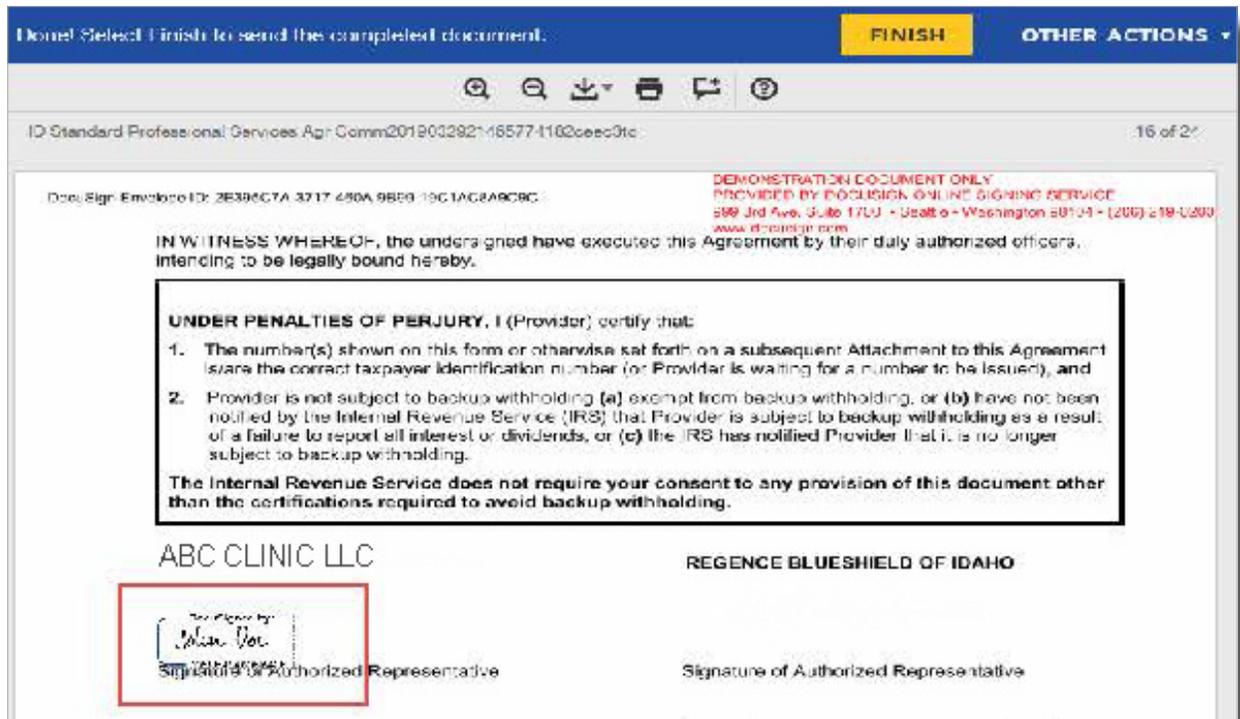
By selecting Adopt and Sign, I agree that the signature and initials will be the electronic representation of my signature and initials for all purposes when I (or my agent) use them on documents, including legally binding contracts - just the same as a pen-and-paper signature or initial.

ADOPT AND SIGN CANCEL

5. Select **Replace** in the **Replace Signed Fields** dialogue.



6. Your new signature will be attached to the agreement. **Note:** The printed organization name will remain the same.



7. Select **Finish** to complete the signature process.