Docusign 101

DocuSign is a HIPPA-compliant resource that allows users to view, create, send, manage, and sign documents electronically.

Use the links below to learn more about DocuSign. Want sending and template access? Fill out this form to request access.

DocuSign vs Adobe | Getting Started | Tutorials | Frequently Asked Questions

DocuSign versus Adobe Digital IDs

DocuSign and Adobe Acrobat both are/have electronic signature solutions, but they are separate programs. DocuSign is a HIPPA-compliant, web-based platform aimed specifically at creating and sending envelopes for electronic signatures. Adobe Acrobat is a standalone program that includes functionality to electronically sign documents, called Adobe Digital IDs. Acrobat is not provided to all School of Medicine users, but if you're interested in a license, please reach out to support@medschool.zendesk.com.

For more information about Adobe Digital IDs, including how to create one, please visit this link.

Getting Started

Navigate to docusign.com in a browser and click Log In located in the top-right corner of the screen.

Enter your @cuanschutz.edu email address into the box and click Continue.

You will be redirected to a CU Passport login page. Log in with your credentials.

That's it!

To learn more about how to utilize DocuSign, click the Tutorial links below or check out the DocuSign instructional videos here.

Tutorials

Signing a document/envelope

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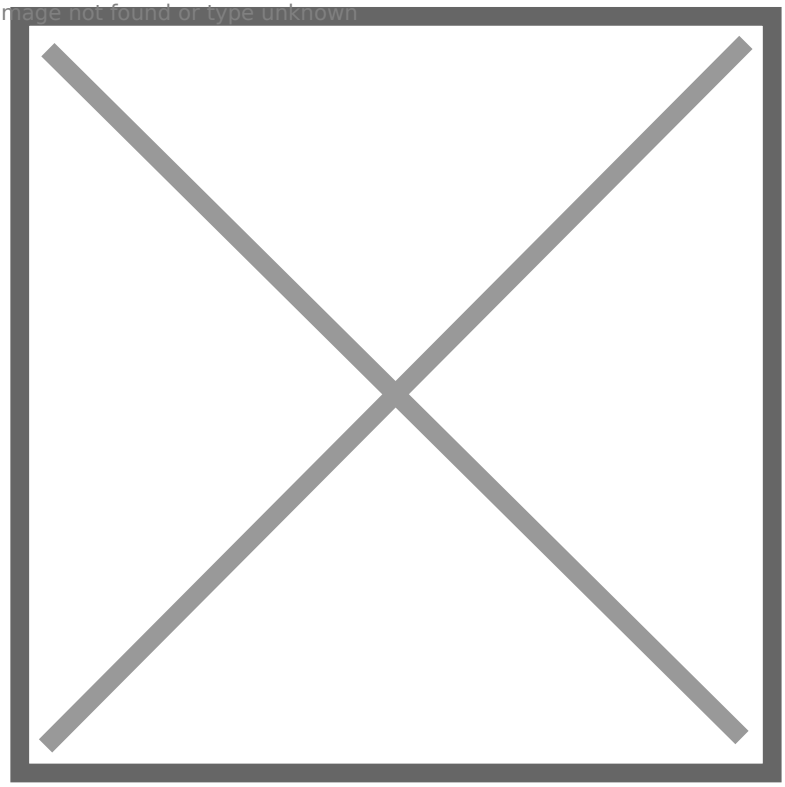

More on signing a document: https://support.docusign.com/en/articles/How-do-I-sign-a-DocuSign-document-Basic-Signing

Sending an envelope

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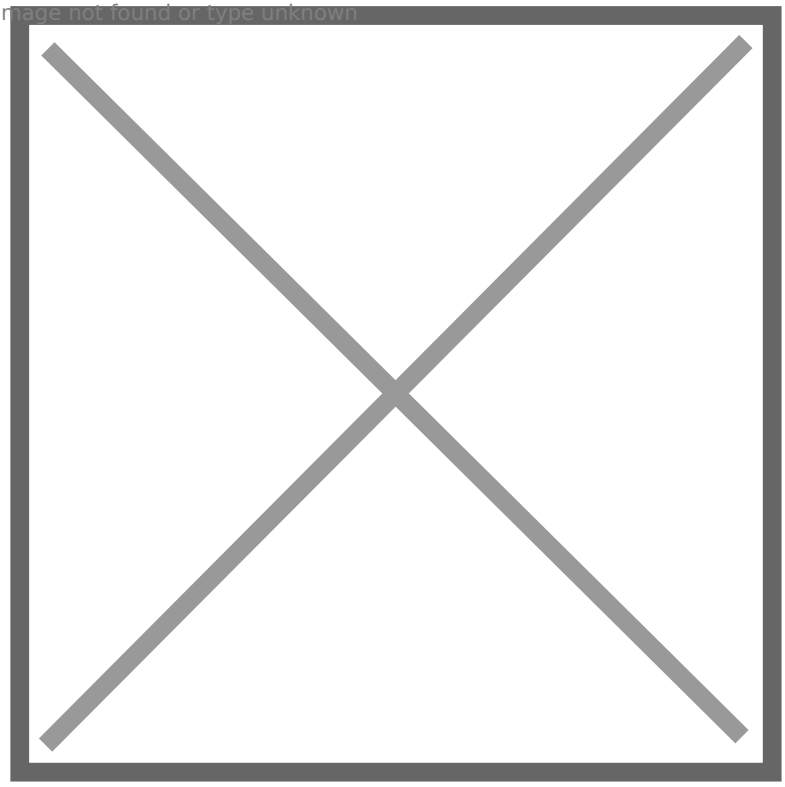

More on sending an envelope: https://support.docusign.com/en/articles/How-do-I-get-signatures-on-a-document-New-DocuSign-Experience

Fields and Labels

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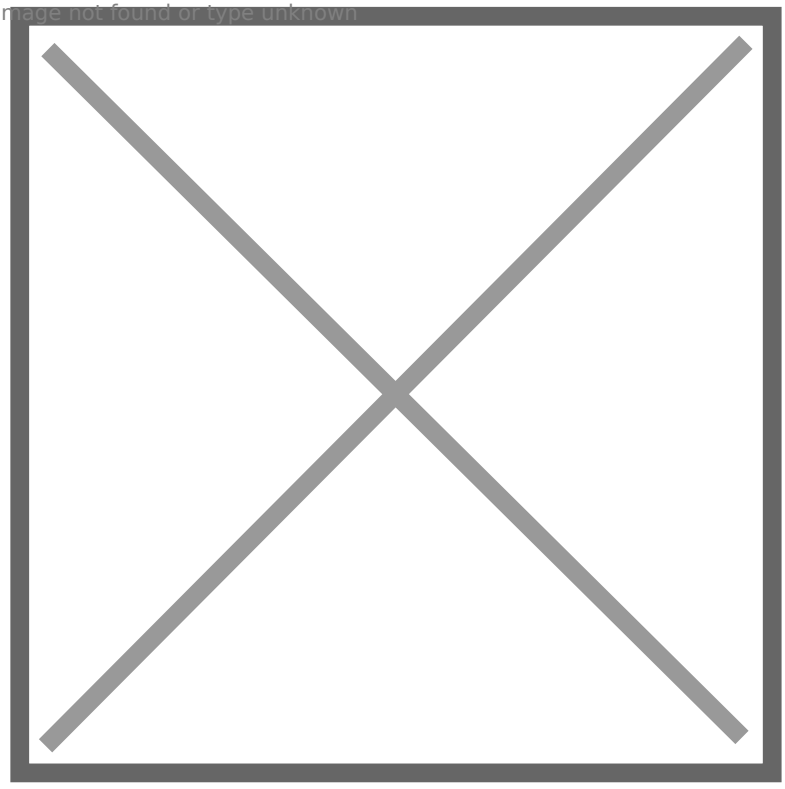

Placing Fields

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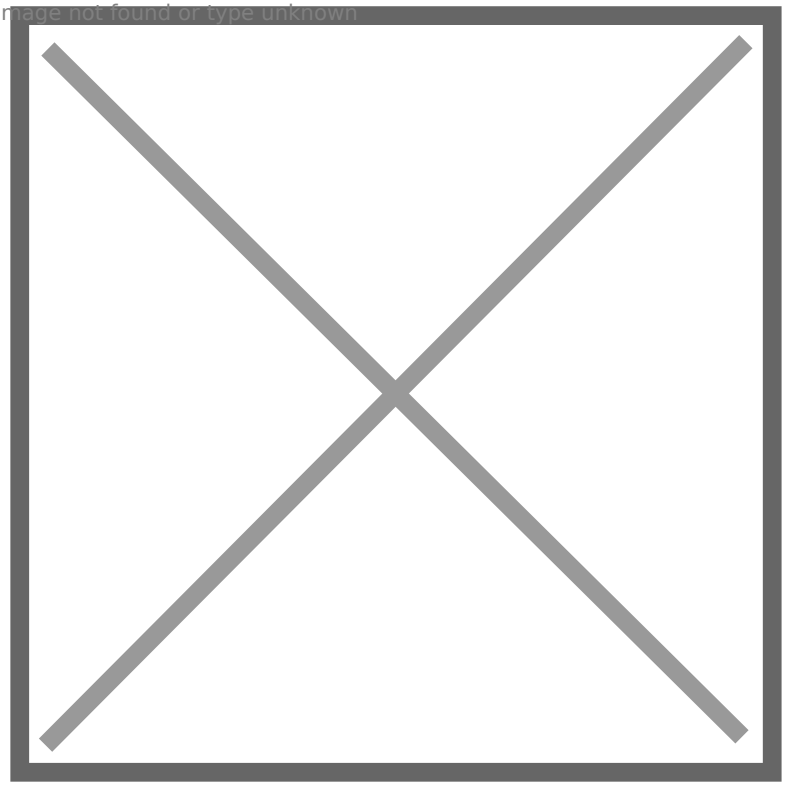

More on adding fields to envelopes: https://support.docusign.com/en/guides/ndse-user-guide-add-fields

Creating Templates

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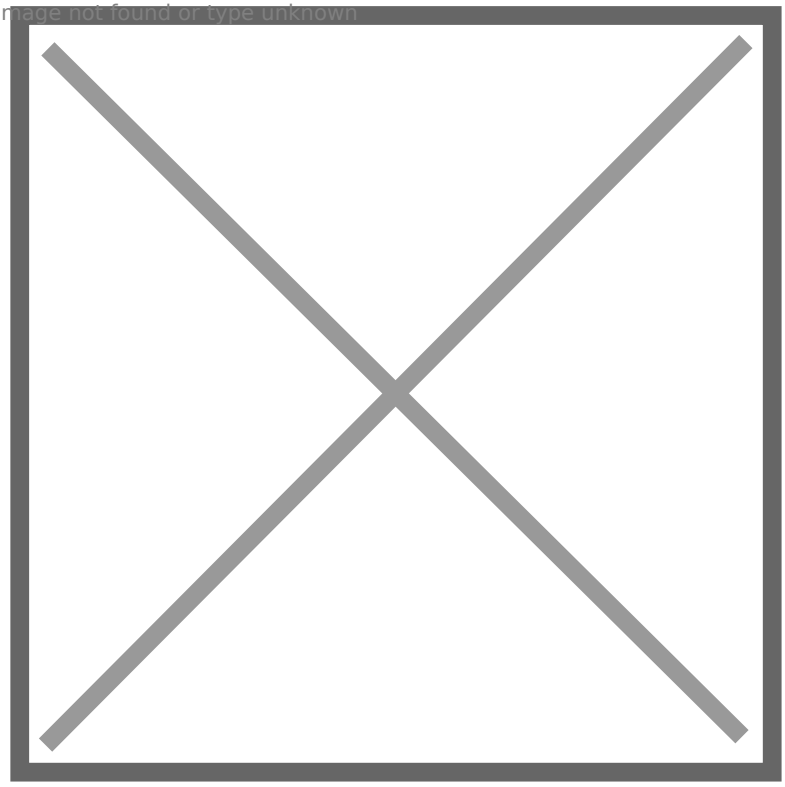

More on creating templates: https://support.docusign.com/en/guides/ndse-user-guide-create-templates

Send Envelope Using a Template

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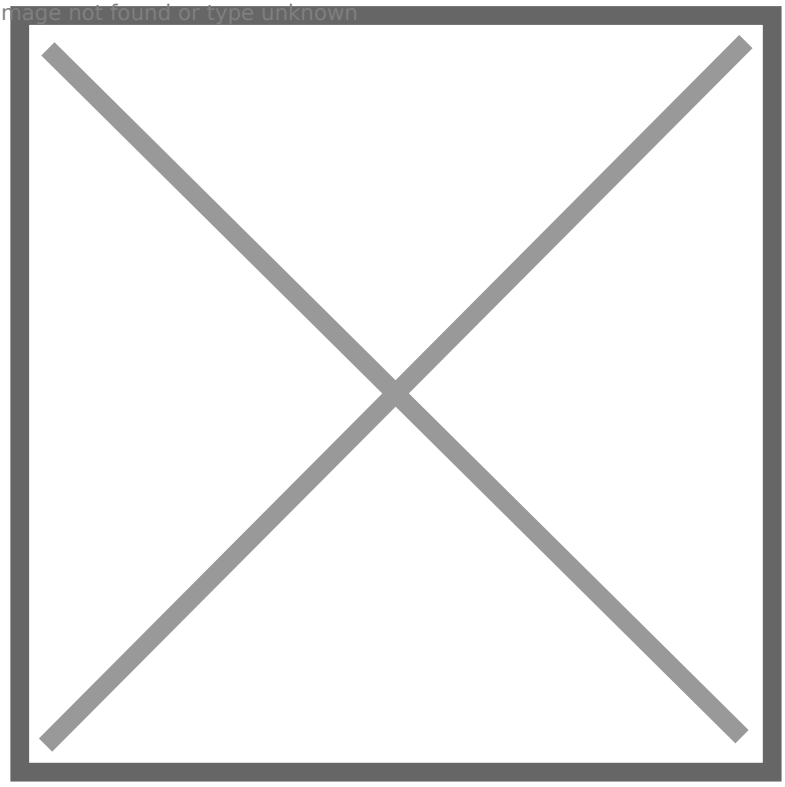

More on adding supplemental documents to an existing template:

https://support.docusign.com/en/guides/ndse-user-guide-add-files

Editing a Template

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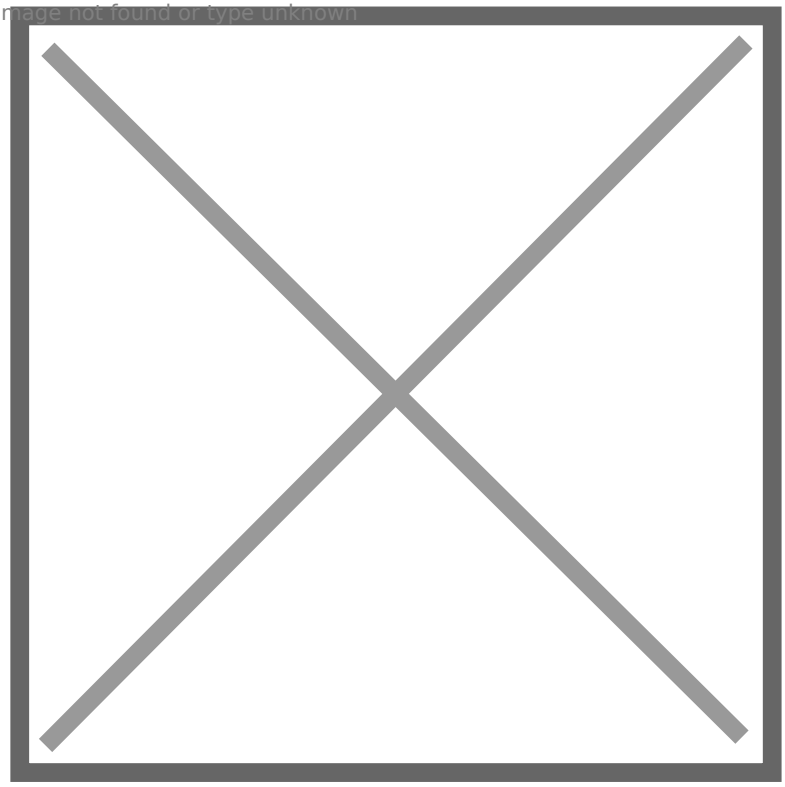

More on editing a template: https://support.docusign.com/en/guides/ndse-user-guide-edit-templates

Frequently Asked Questions

Q: Is DocuSign HIPPA-compliant?
A: Yes, DocuSign is HIPPA-compliant.

Q: Are there other resources I can use for HIPPA-compliant electronic signature forms?
A: RedCap

Q: Is our DocuSign 21 CFR Part 11 compliant?
A: No, the School of Medicine's instance of DocuSign is not Part 11 complaint.

Q: Do we have to pay for CU users to have access to DocuSign?
A: No, DocuSign accounts are provided for users in the School of Medicine.

Q: What is an envelope?
A: An envelope is a term that refers to a document package that needs a signature or signatures.

Q: We have multiple people authorized to sign certain documents for our group/department. Can all users receive alerts when a document needs to be signed?
A: Yes, this is possible. Please put in a ticket at support@medschool.zendesk.com for information about this.

Q: I logged into DocuSign using my credentials but I cannot send envelopes. What's going on?
A: The default user type is Viewer. If you did not request a DocuSign account with upgraded permissions, you will only be able to view and sign envelopes. If you need upgraded permissions to allow you to send envelopes or create templates, please fill out this form.

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