

## DOCUSIGN INSTRUCTIONS – SIGNING THE DOCUMENT

Are you an authorized signer?

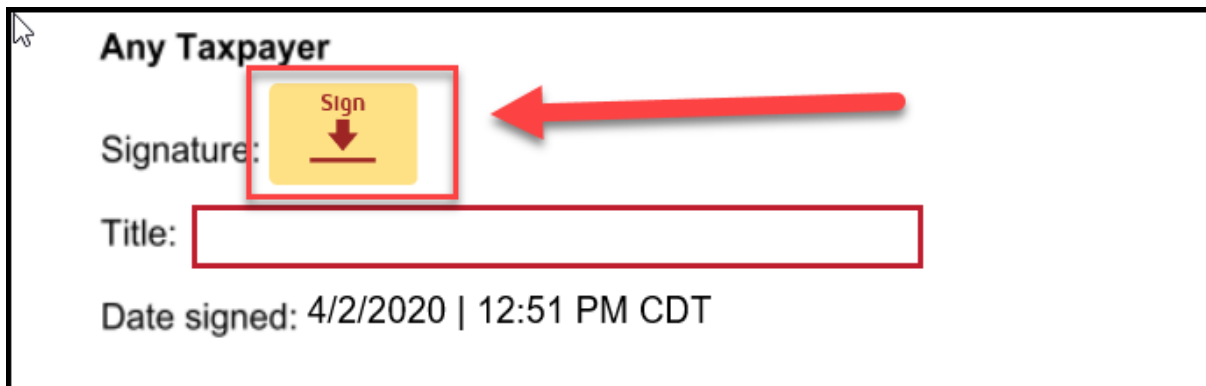
- Yes – Follow Section A instructions to electronically sign the document.
- No – Follow Section B instructions to send document to another person.

### A. Authorized to Sign – Electronically Sign Document

1. Click **link in email** to open document.
2. Select **Continue**.



3. Complete applicable section(s) (e.g., checkboxes, drop-down fields, text fields, or add attachments).
4. Scroll down to the signature area and click **Sign**.



5. If you are new to DocuSign, an **Adopt Your Signature box** will open. Choose one of three methods:
  - Select Style – Change the default signature by clicking on Change Style, scrolling through the options, and clicking on your preferred signature.
  - Draw – Use the mouse and draw a signature.
  - Upload – Upload a saved signature.

When complete, choose **Adopt and Sign**.

**Adopt Your Signature**

Confirm your name, initials, and signature.  
\* Required

**Full Name\***  
Any Taxpayer

**Initials\***  
AT

SELECT STYLE DRAW UPLOAD

**PREVIEW**  
DocuSigned by:  
Any Taxpayer  
F3673677171C40F...  
DS  
AT  
Change Style

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

6. Enter your title in the designated text box (if applicable).

**Any Taxpayer** Required - Signature Applied

DocuSigned by:  
Any Taxpayer  
F3673677171C40F...

Signature:

Title: Comptroller

Date signed: 4/2/2020 | 1:41 PM CDT

7. Click **Finish** on the top right.

FINISH OTHER ACTIONS ▾

8. An email is sent notifying the Department of Revenue (DOR) you have signed the document. After DOR signs the document, **all parties receive an email** with a link to the executed document. DOR does not email a copy of the executed document.

9. Click link **in email** to open document.

10. Choose the **Download icon** and **PDF type** and click **Save**.

- Combined PDF - Zip file with the completed Agreement and Certificate of Signatures
- Separate PDF - PDF of agreement only

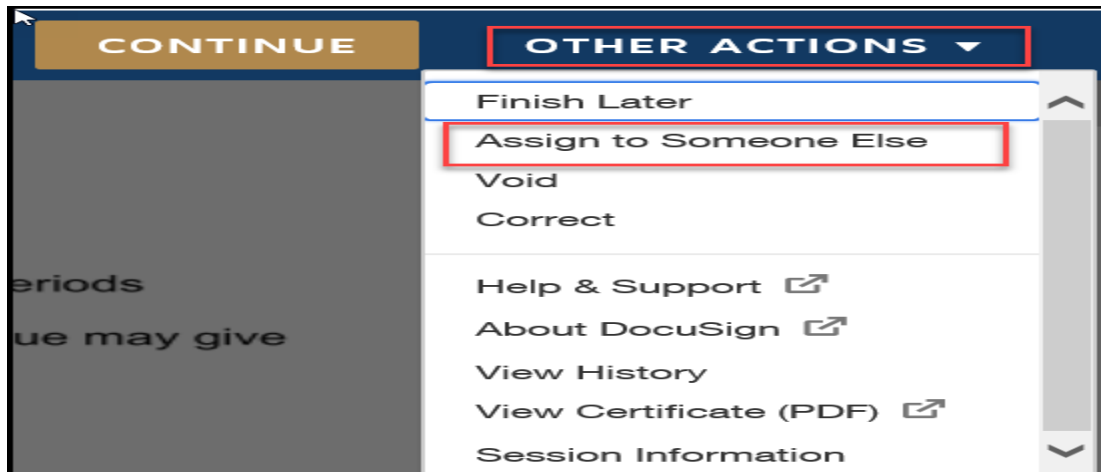
Download icon highlighted.

Combined PDF ↗

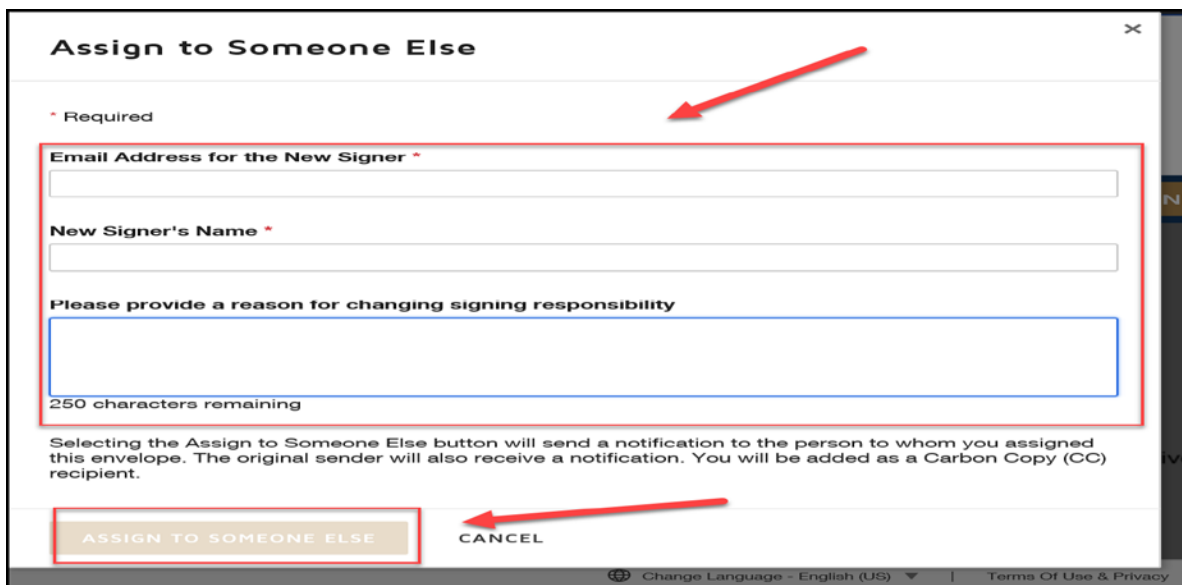
Separate PDFs ↗

## B. Not Authorized to Sign – Send to Another Person

1. Click link in email to open document.
2. Select drop-down arrow, **Other Actions** and choose **Assign to Someone Else**.



3. Complete
  - Email address for new signer.
  - New signer's name.
  - Reason box – Enter reason for sending to another for signature. **Example:** Not authorized to sign. Forwarding WI extension to VP.
  - Click **Assign to Someone Else**.

A screenshot of the 'Assign to Someone Else' dialog box. The title is 'Assign to Someone Else'. Below the title, there is a red asterisk and the word 'Required'. There are three input fields: 'Email Address for the New Signer \*', 'New Signer's Name \*', and a larger text area for 'Please provide a reason for changing signing responsibility'. Below the text area, it says '250 characters remaining'. At the bottom, there are two buttons: 'ASSIGN TO SOMEONE ELSE' and 'CANCEL'. Red arrows point to the 'Required' label, the 'ASSIGN TO SOMEONE ELSE' button, and the 'CANCEL' button. At the bottom of the dialog, there is a footer with 'Change Language - English (US)' and 'Terms Of Use & Privacy'.

4. Email is sent to the new signer and auditor.
  - New signer: Reason for changing signing responsibility from Step 3 is in the email. Follow Section A to sign document.
  - Auditor: Email subject line is "Change in Signer." It is for informational purposes only. No action is required by the auditor.