DocuSign Quick Reference Guide

Step 1:
Open the email & click “REVIEW DOCUMENT”

Step 2:
Please read the records & disclosure document then select the box to agree & click CONTINUE

Step 3:
Information is pre-populated. Please review for accuracy.

Very Important: Only initial if you are the Program Director (PD). If you are authorized to sign for the PD, continue on for steps on how-to to reassign.
Step 4: Scroll down. Review and complete Unusual Circumstance questions

Step 5:

If you initialed above as the Program Director complete the certification/attestation section, then click FINISH

If you are the Coordinator or authorized to sign on behalf of the Program Director, select OTHER ACTIONS from top right dropdown & click “Assign to Someone Else”

Step 6: Type in YOUR email & tab to next box. Your name will automatically appear
Step 7: Select RESET from the blue hyperlink under your name

Step 8: After you click RESET, the box will be blank. Type in the name of the Program Director.

Insert a message (optional).

Select “Assign to Someone Else”
**Step 9:** The verification portion has been completed. You will receive a DocuSign Notification message page to confirm you have “assigned to someone else”.

![Image of DocuSign Notification](image_url)

**Step 10:** You will receive a **new email** with the “REVIEW DOCUMENTS” link to complete the signature portion.
Step 1:
The new email will look similar to the email from Step 1. Select REVIEW DOCUMENT.

FSMB QA
fsmbqa@fsmb.org

Step 2:
Select NO THANKS, as you are not required to sign in or create an account.

Step 3: Initial & complete the certification/attestation portion.
Step 4: Select FINISH

YOU ARE DONE!

Simple and secure. Now, you can exit out of this browser.