


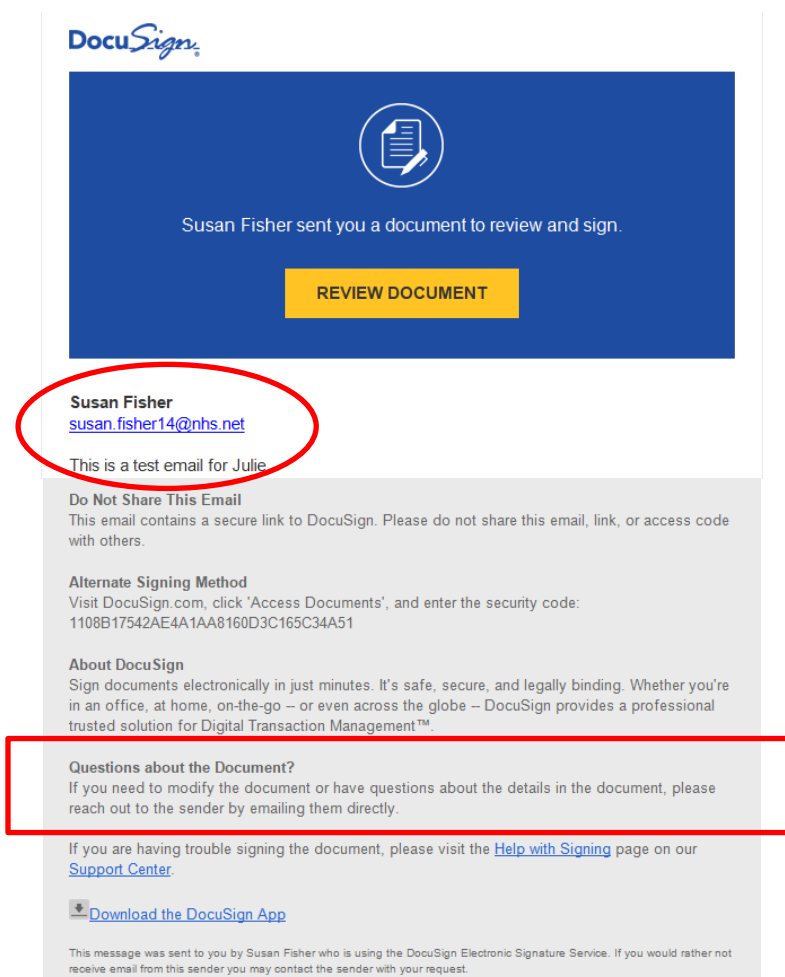
HOW DO I? Sign a document using DocuSign

By using this How Do I..... You will be able to use the DocuSign system to approve a document. DocuSign allows multiple recipients to be sent a document for signing electronically, for example an Information Sharing Agreement might be sent to all 65 GP practices in Somerset for signing.

You can accept and sign a document from your PC, laptop or smartphone. You will receive an email with an invite to sign, it will say the sender's name followed by "via DocuSign":

 Susan Fisher via DocuSign Please DocuSign: Copy SiDeR Overall ISA v1.4 Sign up.docx

Open the email and click the **Review Document** button, please note there may be a message you need to read under the senders name and email address:

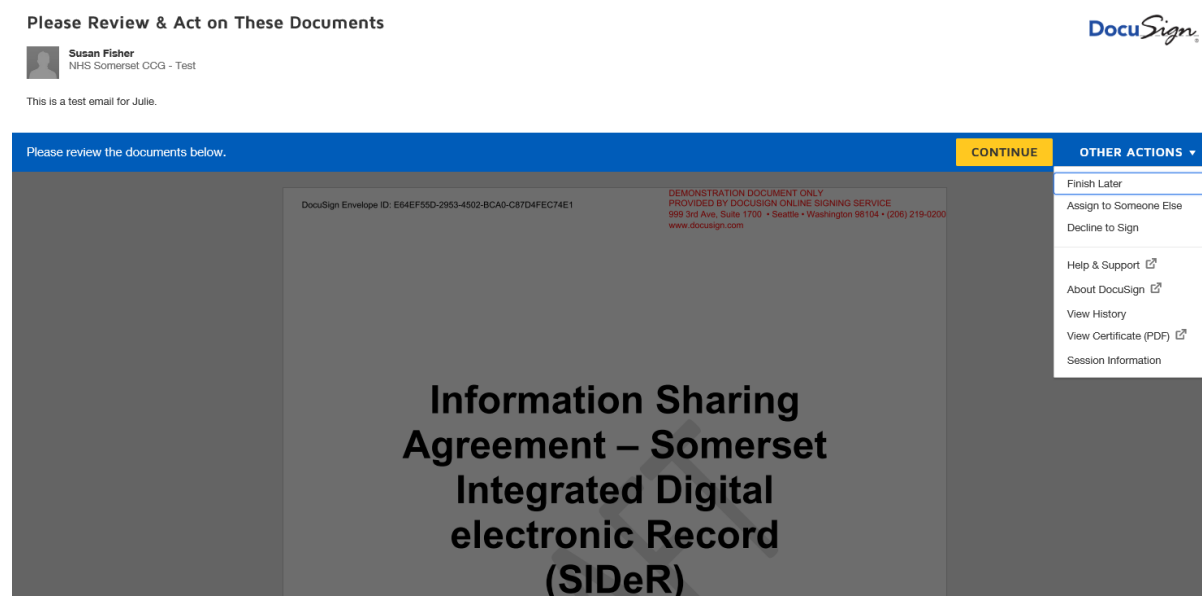


NOTE: If you have any queries regarding the document email the sender direct – their email address is directly under the Review Document button. DO NOT decline the document as that will stop the signing process for all other parties.

On clicking review document a dialog box will open asking which internet browser you wish to use to view it. **Select your choice** (it defaults to internet explorer) and click **OK**

The internet opens with the document greyed out. There may be a pop up asking if you allow DocuSign to track your location. **You do not have to accept this pop up in order to continue:**

The document is displayed with the sender details plus any message they have sent you at the top left of the screen. A menu is at the top right:



You can either choose to click **Continue** which will open the document or you can click on **Other Actions** to display a menu – you may wish to **Assign to Someone Else** in your organisation to sign or **Finish Later** if you do not have time to read the whole document now.

NEVER CLICK ON “Decline to Sign” as this will negate the whole document for everyone, even if all the other organisations have already agreed to and signed the document. If you have any issues with what is written please email the sender with your questions/concerns.

On clicking continue the document opens for you to read – clicking the **Start** or **Finish** button will take you straight to the signing page:



You will see a **sign box** where your signature is required. If other organisations have already signed you will see their signature box already populated:

Select the sign field to create and add your signature. **FINISH** OTHER ACTIONS ▾

13 Processes for data transfer
To be confirmed in each use case.

14 Qualifying standards for partner agency sign up
IG Toolkit level 2 (replace with Data Security & Protection Toolkit compliance). Partners without IGT or DS&PT will be asked to undertake an assessment before they can join SDeR. If they are unable to, then participation will be agreed by exception by the Somerset Information Governance Working Group and Digital Steering Group.

All staff accessing personal data must be up to date (i.e. within last 12 months) with their core Information Governance training.

15 Signatories

Required - Sign Here

Henford Lodge Medical Centre

Ryalls Park Medical Centre

Preston Grove Medical Centre

Oaklands Medical Centre

Somerset CCG

Julie Hill

Kevin Caldwell

Click on **Sign** which will populate your signature in the box:

15 Signatories

Required - Signature Applied

Henford Lodge Medical Centre

Ryalls Park Medical Centre

Preston Grove Medical Centre

Oaklands Medical Centre

Julie Hill

Kevin Caldwell

Click **Finish**. The sender will be emailed to say you have signed. You will be sent an email with the final document attached once all other parties have signed too.

If you have a DocuSign account (you are not required to set one up) this dialog box will open if you wish to access your account:

Log in to DocuSign

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

Email
julie.hill45@nhs.net

LOG IN NO THANKS