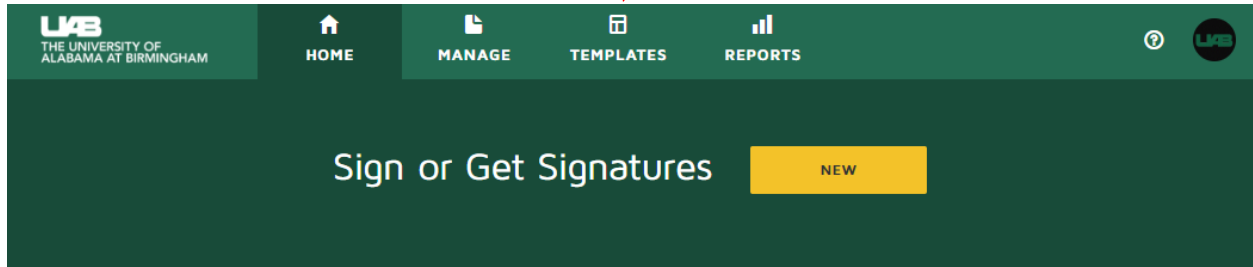


If you ever need help, please visit [uab.edu/esignature](http://uab.edu/esignature) for FAQs or submit a ticket at [uab.edu/askit](http://uab.edu/askit)!

## Extramural e-Checklist

1. From the homepage, select “Templates.”



OVERVIEW Last 6 Months

- Action Required 1 >
- Waiting for Others 2 >
- Expiring Soon -- >
- Completed 1 >

WHAT'S NEW

- Download/Upload Multiple Templates**  
Move multiple templates at once between accounts. [More Info](#)
- Brand Your Account**  
Style your DocuSign account by applying your brand colors and company logo. [More Info](#)
- Payments**  
(Available in the U.S., U.K., Australia, and Canada only) Collect payments with your signed agreements. [More Info](#)

MY DOCUSIGN ID Edit

UAB eSignature  
esignature@uab.edu  
Member since 2018

DocuSigned by:  
UAB eSignature  
5B41131FA5CA42B...

2. On the Templates page, select All Templates on the left panel, search for “Extramural Support Checklist”, and click the blue “Use” button.

DocuSign eSignature Home Manage Templates Reports TP

NEW My Templates  FILTERS

	Name	Owner	PowerForms	Created Date	Last Change	Folders
<input type="checkbox"/> ☆	Extramural Support Checklist Eligible for matching	Timothy Parker		3/12/2020 11:18:52 am	3/13/2020 08:12:35 am	<span>USE</span>

3. The workflow should be established for you already. Under each designated role, enter the recipient's name and email. Enter the Department Personnel that will complete the checklist and the Program Director/Principal Investigator who will be the contact PI.

Extramural Support Checklist

Recipients

1 Department Personnel ✍️ NEEDS TO SIGN MORE ▾

Name \*

Timothy Parker : tmparker@uab.edu

2 Program Director/Principal Investigator ✍️ NEEDS TO SIGN MORE ▾

Name \*

Email \*

3 Program Director/Principal Investigator ✍️ NEEDS TO SIGN MORE ▾

Name \*


**SEND**    ADVANCED EDIT    DISCARD

4. Delete any unnecessary recipients by clicking the X as shown below. You cannot delete the Department Personnel field and complete the checklist. Delete any extra Program Director/Principal Investigators, Division Directors, Department Chairs, Facilities & Planning or Deans that are not required. You must enter an authorized name and email address for each remaining Recipient.

2

Program Director/Principal Investigator ✍️ NEEDS TO SIGN MORE ▾

Name \*

Timothy Parker 


Email \*

tmparker@uab.edu

3

Program Director/Principal Investigator ✍️ NEEDS TO SIGN MORE ▾

Name \*

Timothy Parker 

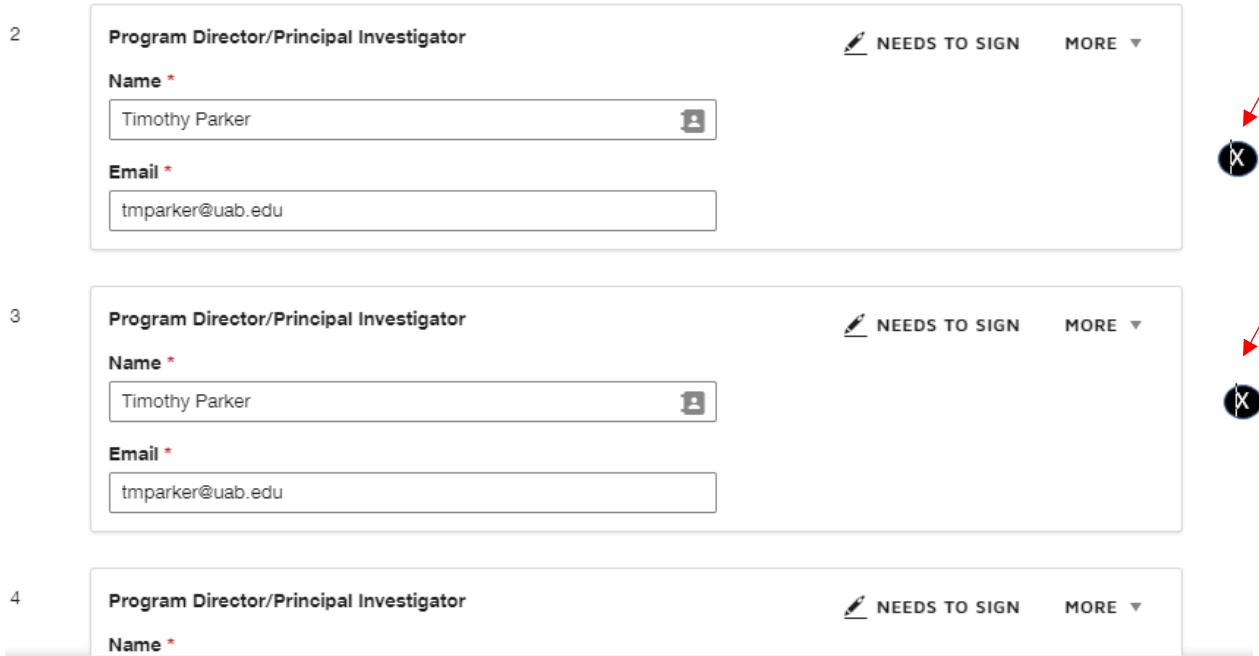
Email \*

tmparker@uab.edu

4

Program Director/Principal Investigator ✍️ NEEDS TO SIGN MORE ▾

Name \*



5. Modify the recipient messaging as necessary.

**Message to All Recipients**

Custom email and language for each recipient

To: Department Personnel

**Email Language \***

English (US) ▾

**Email Subject \***

Please DocuSign: Extramural Checklist for [[Program Direct

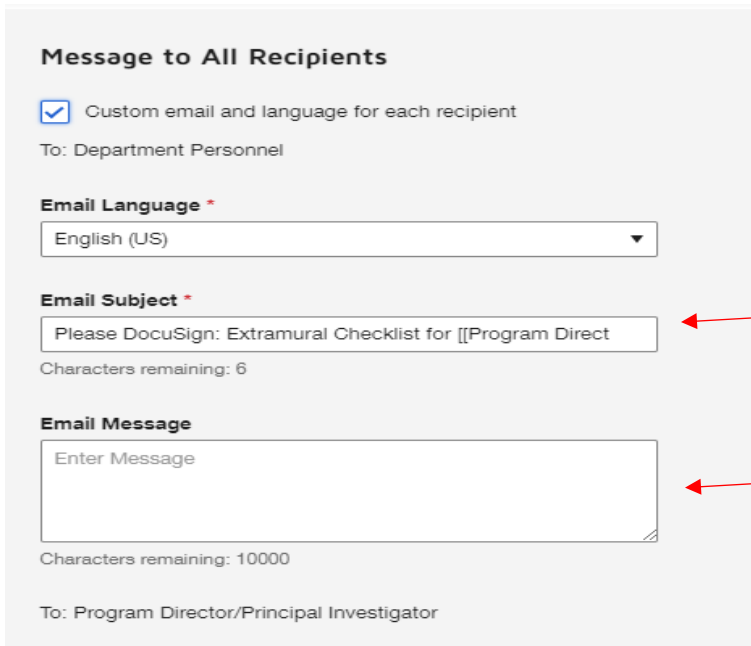
Characters remaining: 6

**Email Message**

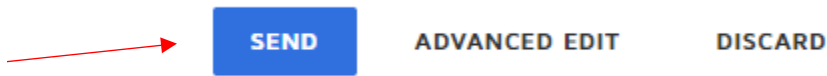
Enter Message

Characters remaining: 10000

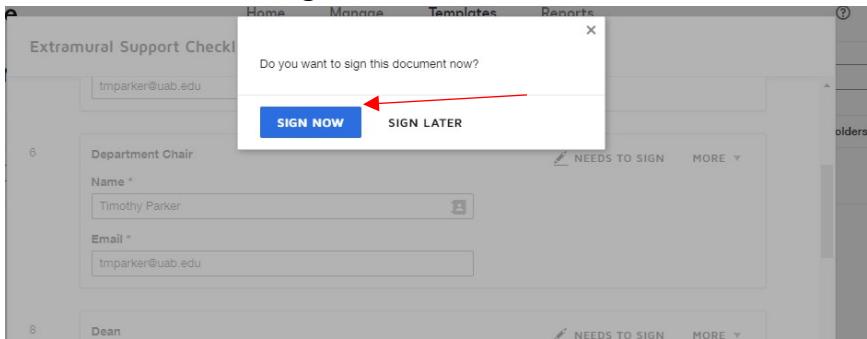
To: Program Director/Principal Investigator



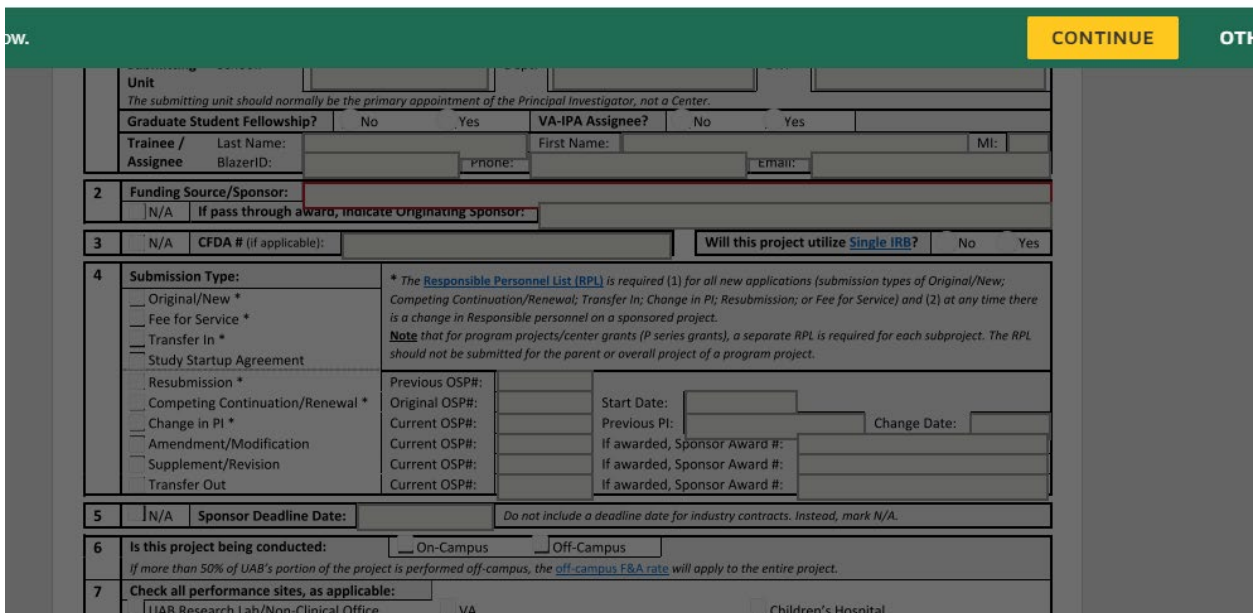
6. Once you are done entering information, click the blue “Send” button.



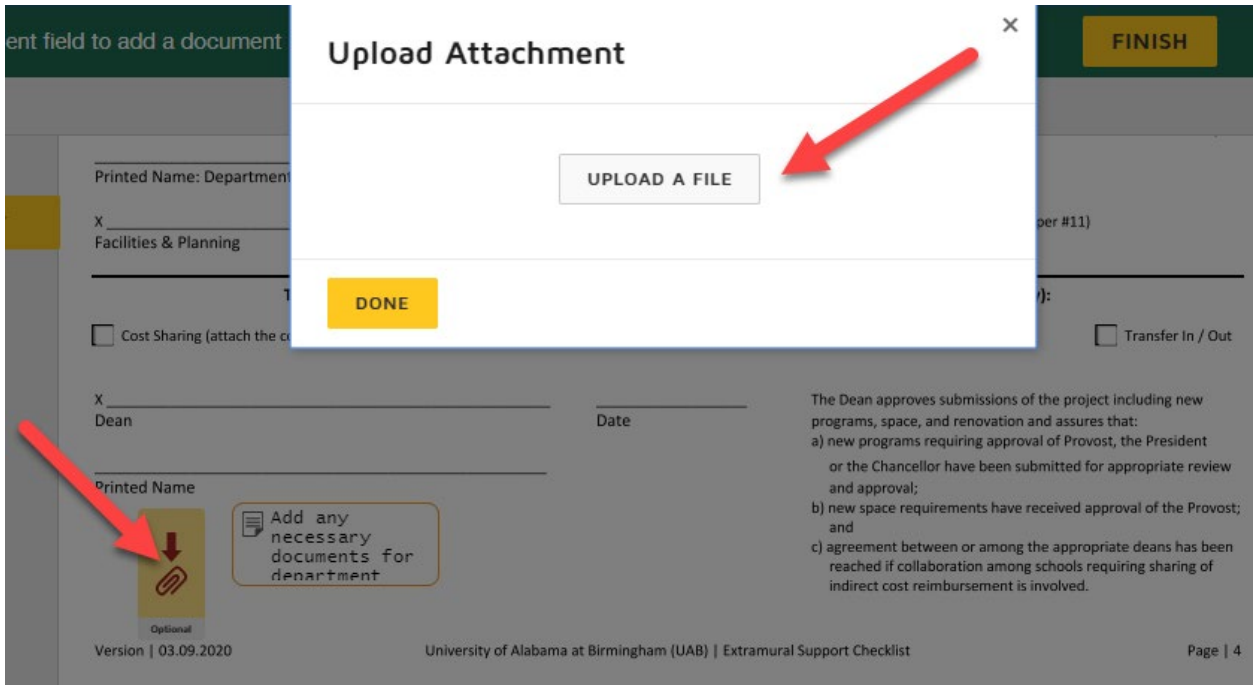
7. You will be asked to Sign it.



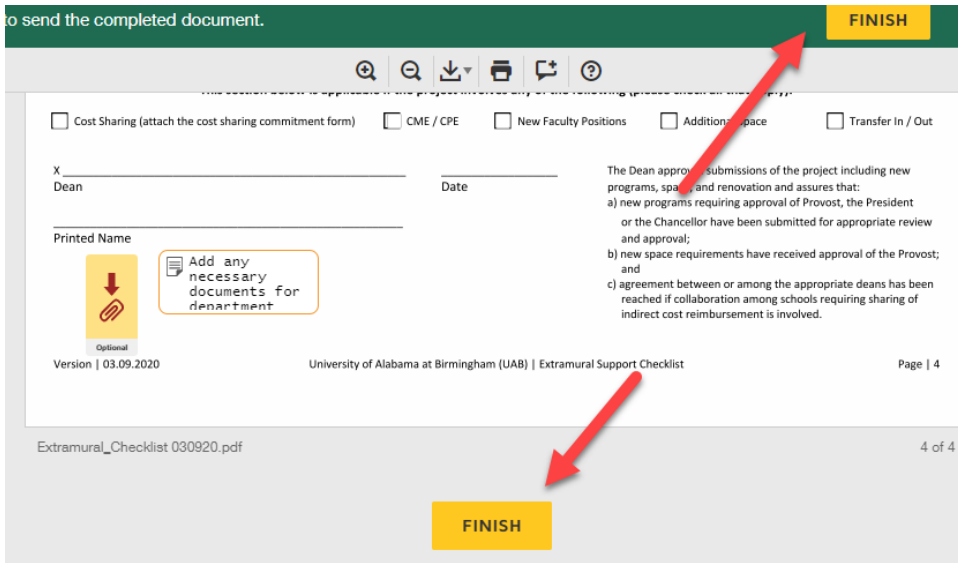
8. Click “Continue” to start editing the checklist.



9. If you need to add documents for internal departmental review during the signature process, then please add the attachments to the bottom of the checklist. Click on the paperclip and then an Upload Attachment box should appear. Click on the Upload a File.



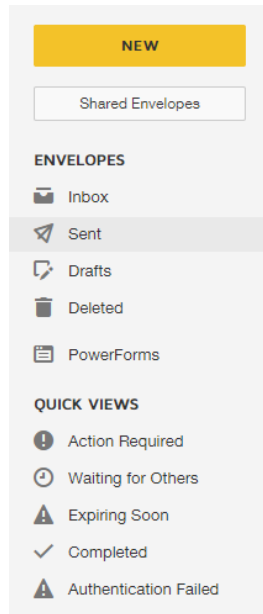
10. After completing editing the checklist click on Finish at either location.



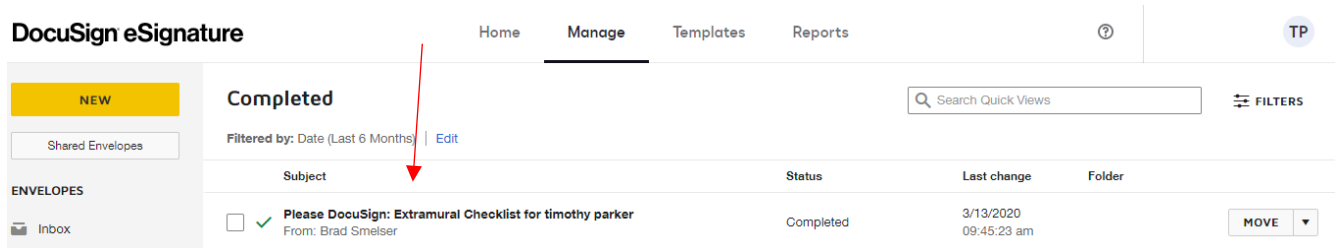
11. To view the status of an envelope, click the "Manage" button at the top of the page.



12. On the Manage page, from the left sidebar, select the correct menu option. For example, if you are looking for the status of an envelope you sent out for signature, click “Sent.”



13. In the appropriate folder, you can now click on the name of the envelope.



14. On the envelope page, you’ll have many options depending on where the envelope is in the signing process. If the signing process is complete and you want to download copy, click the download button as shown below, and then click the blue “Download” button.

Please DocuSign: Extramural Checklist for timothy parker ⓘ

From: Brad Smelser  
Last change on 3/13/2020 | 09:45:23 am  
Sent on 3/13/2020 | 09:41:28 am

✓ Completed

MOVE MORE ▾



Recipients

SIGNING ORDER

✓ **Brad Smelser**  
1 smelser@uab.edu

Signed  
on 3/13/2020 | 09:43:12 am  
Signed in location

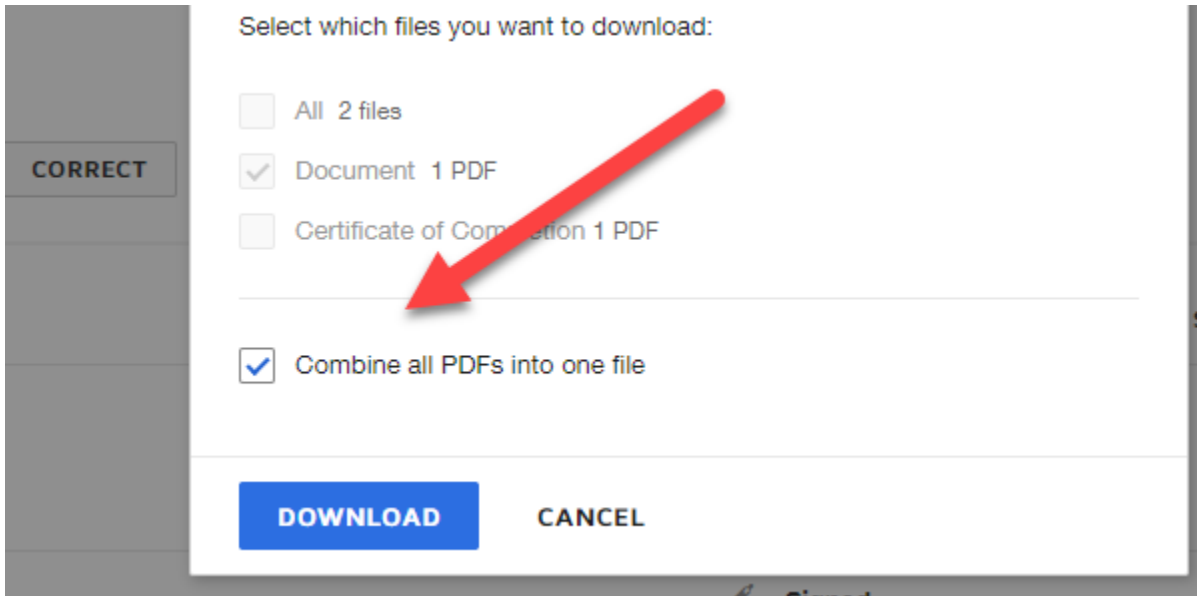
✓ **Timothy Parker**  
2 tmparker@uab.edu

Signed  
on 3/13/2020 | 09:45:23 am  
Signed in location

Message

No message has been entered.

15. Now select Combine all PDFs into one file and download.



Congrats! You now know how the whole DocuSign sender life cycle works!

16. Email your completed Extramural Support Checklist and other required documents to osp@uab.edu.