



DHS eSign

User Manual

Version 1.2

Revision History

Date	Version	Description	Author
07/10/20	1.0	DHS eSign Manual	Pamela Okojie
07/27/20	1.1	Modified Generate eSign Request	Jagadesh Nadakuditi
09/25/20	1.2	Added Request Decline Instruction	Pamela Okojie

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1 Introduction

The eSign application is a web-based application used to capture multiple signatures on documents which are routed securely through the eSignature workflow. Additionally, the signed documents are stored in a secured repository.

Purpose

This document is a user manual for the eSign Application. It provides all the necessary information to use this system. The manual includes a description of the system functions and capabilities, step-by-step procedures for system access and use, and incorporates detailed illustrations where possible.

Scope

This manual describes the state of the application as of July 1, 2020.

Website URL

The website address of eSign is:
<https://oitapps.dhs.ga.gov/ENTFORMS/Account/Home/Login> The website can be accessed from the DHS network or by using VPN only.

1.1 eSign Users

The eSign application has different types of users with access to the different modules of the application. These users include:

1. Supervisor
2. Manager

1.1.1 Supervisor

A Supervisor can submit new eSign requests, but they can only view requests submitted by themselves.

1.1.2 Manager

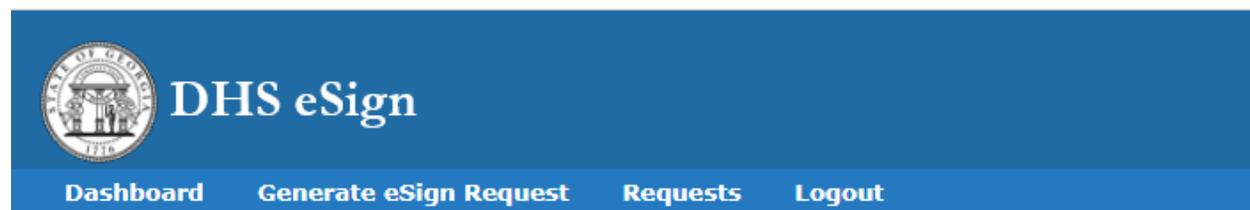
The Manager role can view all requests of the Division/Office/Group to which this user belongs. They can all submit new eSign requests.

2 eSign Functionality

The eSign application has four menu options, however the ability to access and edit these options is dependent on level access granted to the different types of users.

The menu options are as follows:

1. Dashboard
2. Generate eSign Request
3. Request
4. Logout

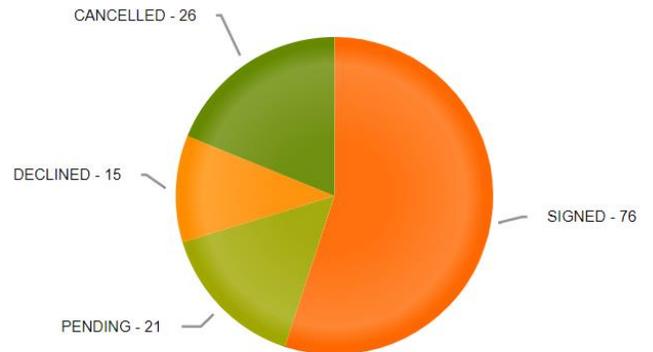


2.1 Dashboard

The dashboard provides a graphical display of the status of various form types.

1. **Select Form** is a prepopulated drop-down field that lists document types available for users to view based on division and role.
 2. By default, "All" is displayed.
 3. The graph is updated when a new form is routed for eSignature or status of existing form is changed.
-

Select Form -All-



— SIGNED — PENDING — DECLINED — CANCELLED

2.2 Generate eSign Request

Documents containing PHI data should not be routed through this application.

Generate eSign Request

Add Signers

Document Type Select Document

Are you filling this request on behalf of someone else?

Please add signers in sequence(Ascending) as per the routing document workflow.

+ Add Signer

Email	Edit	Delete

◀ 0 ▶ No Items to display

Add Files

+ Add Document

Name	Is Add...	Co...	Loade...	Loade...	Downl...
No attachments found					

Please confirm the signers email ID and routing sequence are as per the document workflow.

Send

The Generate eSign Request screen is used to route a new document through the workflow.

2.2.1 Add Signers

1. Select **Document Type** from prepopulated drop down.
2. Check “**Are you filing this request on the behalf of someone else?**” if applicable. If checked, the email address box will be enabled for you enter the other person email ID. Otherwise, this box is disabled.
NOTE: If the person routing the document would like to receive an email after all parties complete signing, they must check the checkbox and enter their own email ID.
3. Click **Add Signers** button.
4. Enter **Email Address** of person to receive document for signature.
5. Repeat steps 3 and 4 until all users have been added.
6. Select **Update** to add, **Cancel** to clear selection, or **Delete** to remove a signer.
7. The signers name will be displayed in the singer grid.

NOTE: Signers must be entered in the sequence you want the document signed.

Generate eSign Request

Add Signers

Document Type Select Document

Are you filling this request on behalf of someone else?

Please add signers in sequence(Ascending) as per the routing document workflow.

+ Add Signer

Email	Edit	Delete
<input type="text"/>	<input type="button" value="✓ Update"/> <input type="button" value="⊘ Cancel"/>	<input type="button" value="✕ Delete"/>

1 - 1 of 1 items

2.2.2 Add Files

Additional documents can be attached to the document to be eSigned.

1. Click **Add Document**.
2. The **Edit** popup appears.
3. **Choose File** from local or external drive.
4. Enter **Comments** if necessary.
5. Click **Update** to complete tasks or **Cancel** to abort changes.
6. The document and details are now displayed in the document grid.

If you would like to attach supporting documents to the routing document, follow steps **7** to **11**.

7. Repeat the above steps **1** to **3**.
8. Check **Additional Doc** checkbox.
9. Enter **Comments** if necessary.
10. Click **Update** to complete tasks or **Cancel** to abort changes.
11. The document and details are now displayed in the document grid.

Add Files

+ Add Document

Name	Is Add...	Co...	Loade...	Loade...	Downl...		
No attachments found							

Please confirm the signers email ID and routing sequence are as per the document workflow.

Send

2.2.3 Affirmation

1. Click “Please confirm the signers email ID and routing sequence are as per the document flow.”
2. The **Send** button will be activated.
3. The document is routed.

2.2.4 Adding Fields to Form

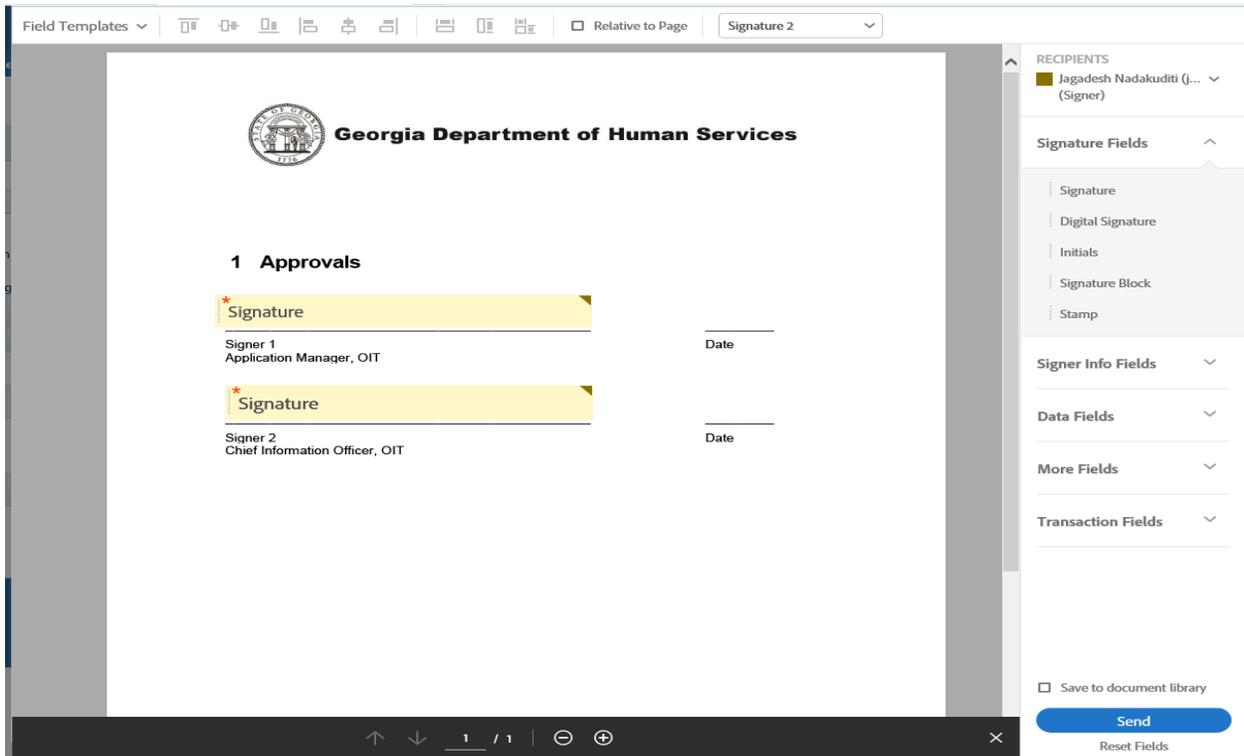
Add signature fields to form:

1. Drag the **Signature Fields** type to the document.

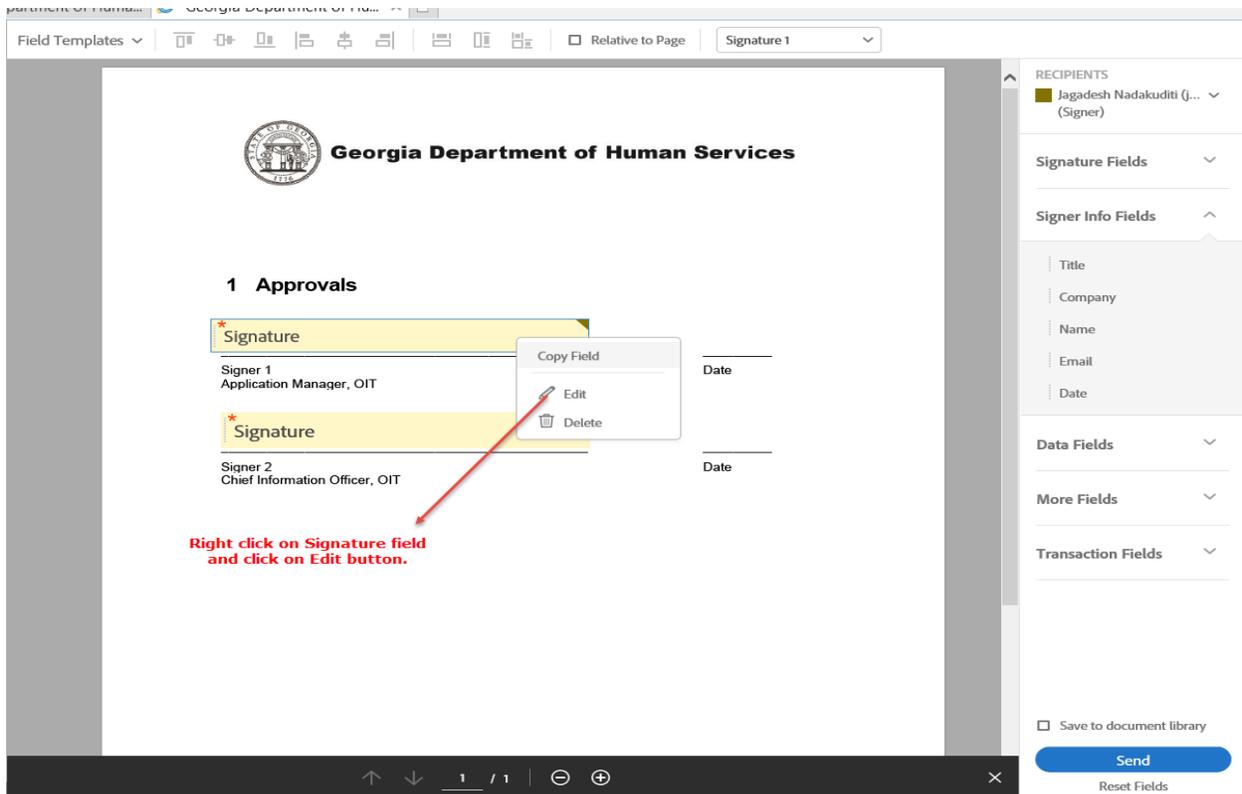
The screenshot displays the eSign application interface. The main document area shows the Georgia Department of Human Services logo and the heading "1 Approvals". Below the heading, there is a red instruction: "Drag the signature field to each signer." Two signature lines are visible, each with a "Date" field to its right. The first signer is "Signer 1 Application Manager, OIT" and the second is "Signer 2 Chief Information Officer, OIT".

The sidebar on the right contains a list of field templates. The "Signature Fields" section is expanded, showing options for "Signature", "Digital Signature", "Initials", "Signature Block", and "Stamp". A red arrow points from the "Signature" option in the sidebar to the red instruction on the document. Other sections in the sidebar include "Signer Info Fields", "Data Fields", "More Fields", and "Transaction Fields". At the bottom of the sidebar, there is a "Save to document library" checkbox and a blue "Send" button with a "Reset Fields" link below it.

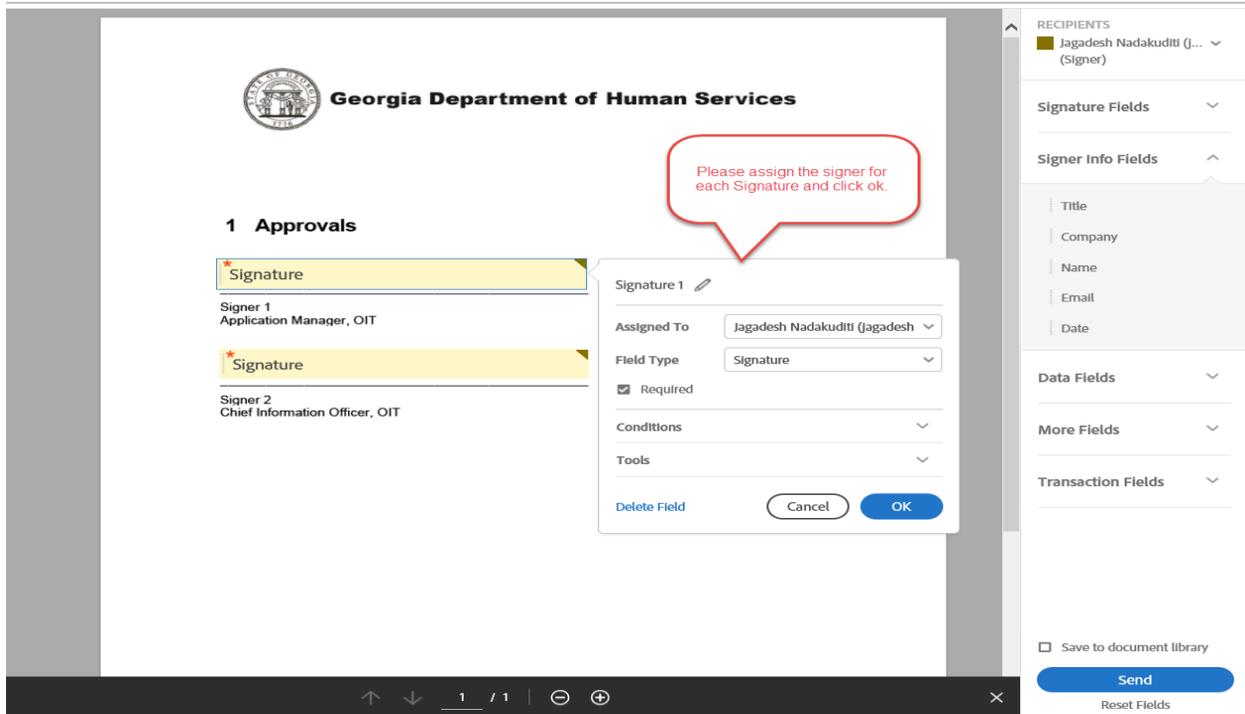
The top of the interface features a toolbar with various icons for document manipulation and a "Navigate to..." dropdown menu. The bottom of the interface shows navigation arrows and a page indicator "1 / 1".



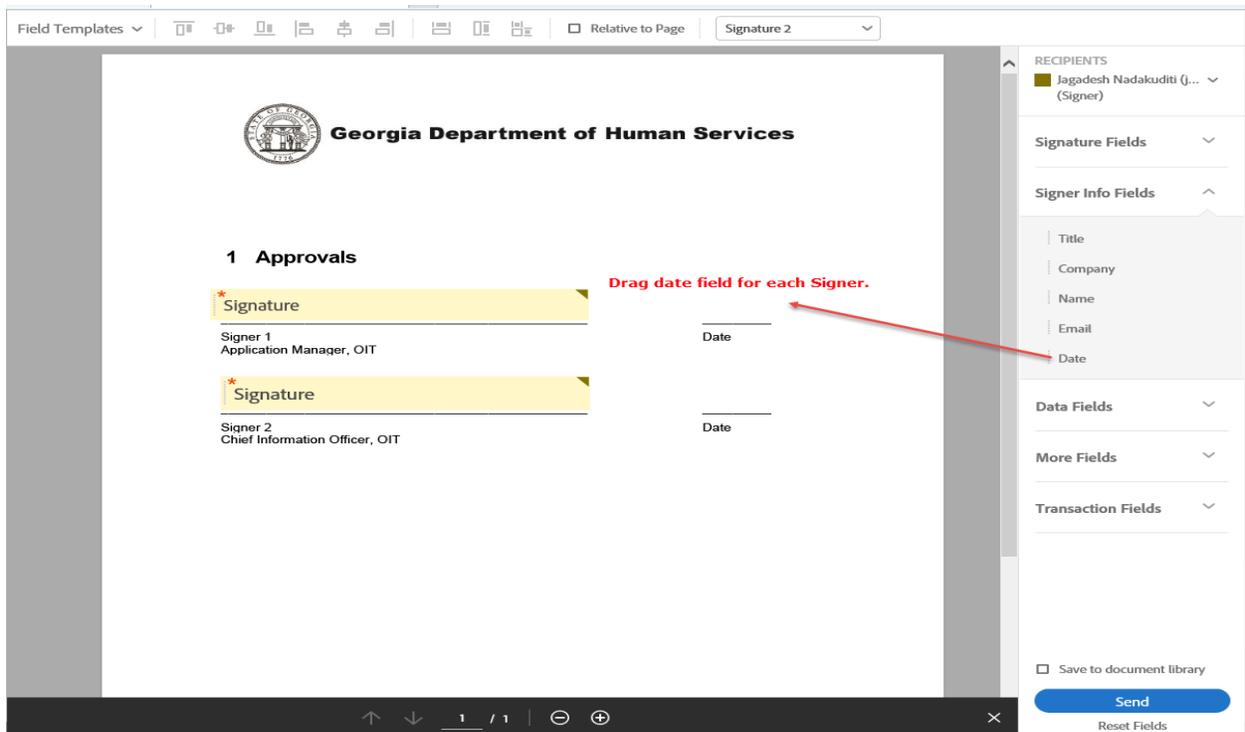
2. Right click on **Signature field** to update field.



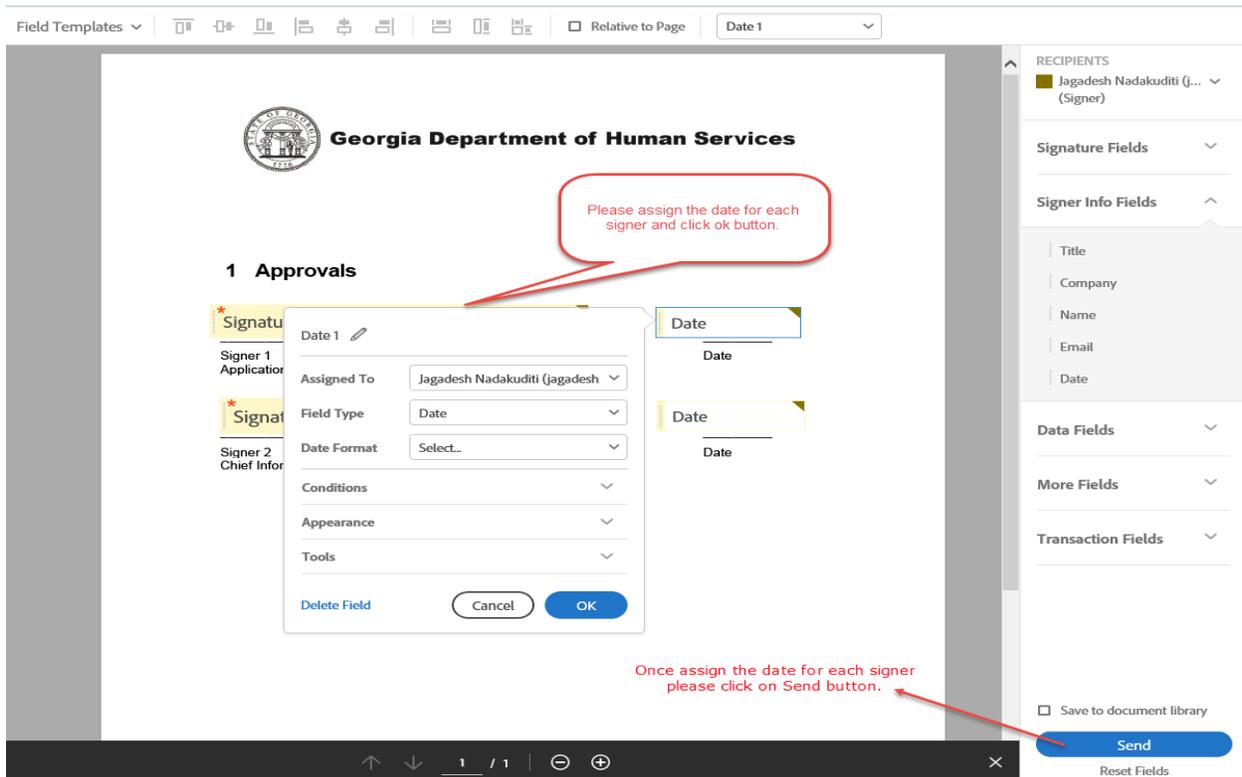
3. Click **Edit**.
4. Select username from **Assigned To** drop down.
5. Click **OK**.



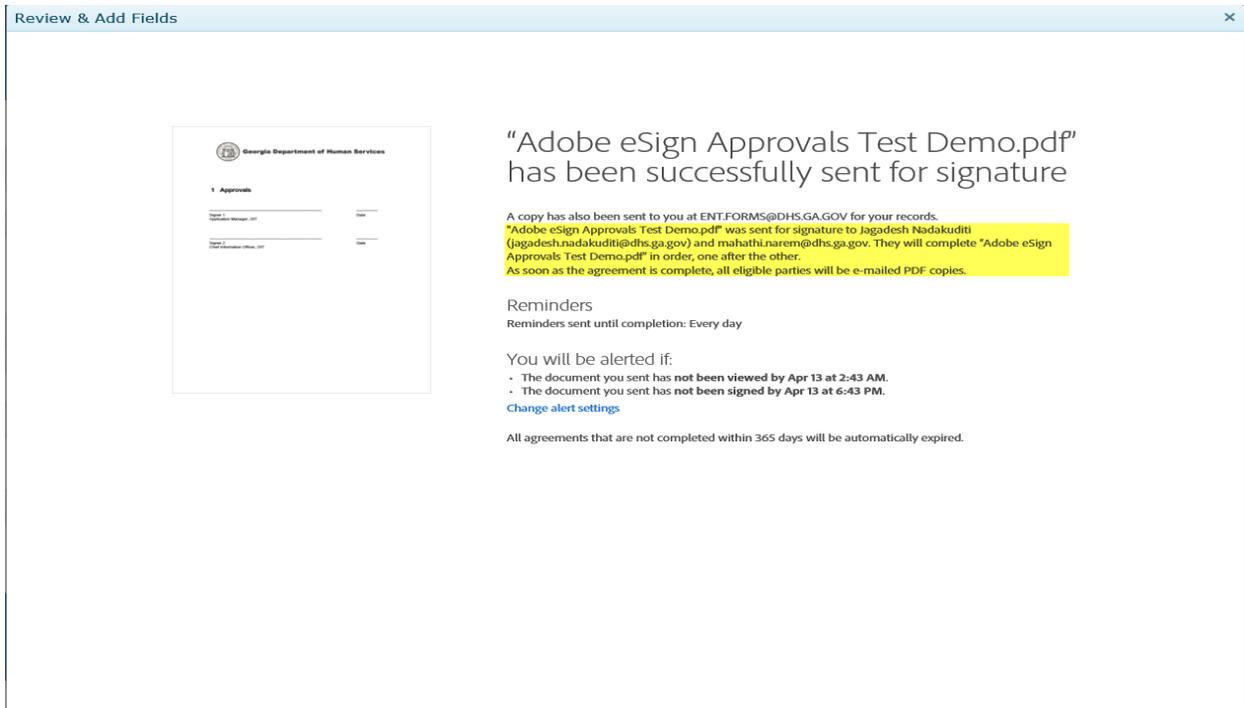
6. Drag **Date** field to form from **Signer Info Fields**.



7. Click **Edit**.
8. Select username from **Assigned To** drop down.
9. Click **Ok**.



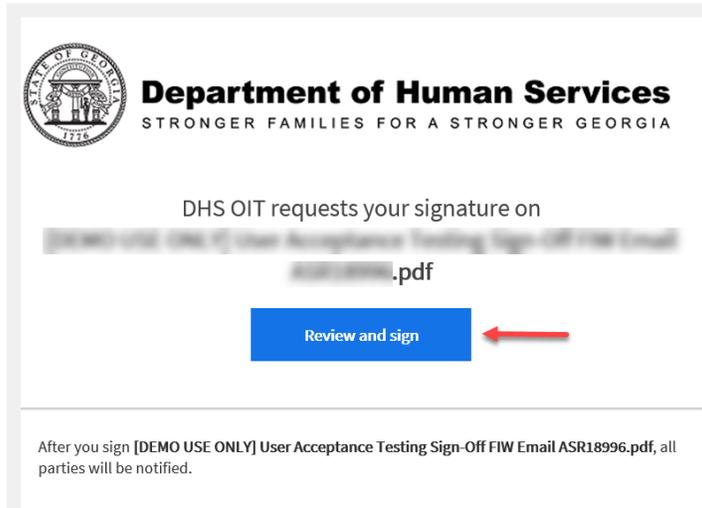
10. Click **Send** to start the routing process.
11. The message will appear confirming the email has been sent.



2.2.5 Signing Process

After the eSign document has been successfully sent, each user will receive an email in sequence. The initial email will be sent to the name that appears first under **Signers**. Once the first signer has completed their signature portion, the document will be routed to the next signer.

1. The designated signer(s) will receive an email.
2. Click **Review and Sign**.



3. Sign designated fields.

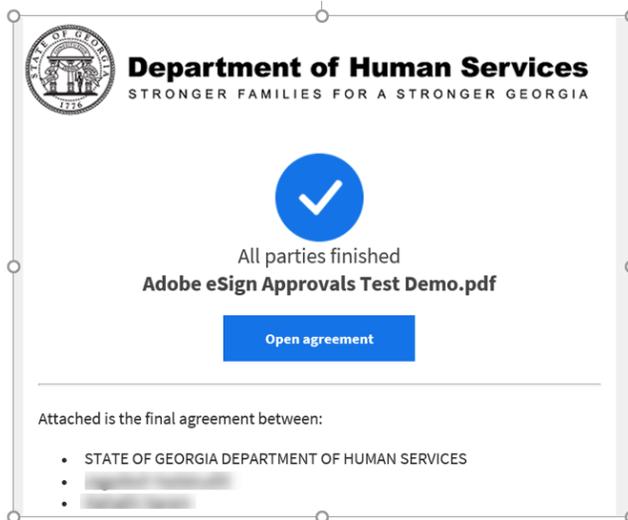


4. Click **Sign**.

5. A message will appear indicating the document has been successfully signed.



6. Once all signers sign the document, an email will be sent to all signers indicating all parties have signed.



2.2.6 Alternate Signatures

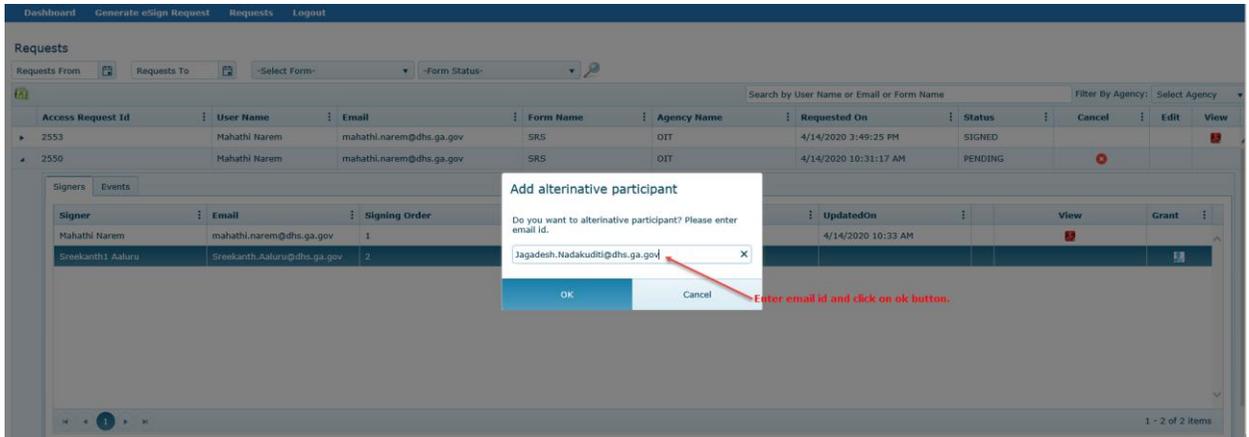
In the event a Signer is not available and alternative signer can be designated.

1. Select **Request** from the menu option.
2. Click the arrow next to the desired ID **Access Request ID** column.
3. On the **Signers** tab, click the person icon  under the **Grant** column.

Access Request Id	User Name	Email	Form Name	Agency Name	Requested On	Status	Cancel	Edit	View
2553	Mahathi Narem	mahathi.narem@dhs.ga.gov	SRS	OIT	4/14/2020 3:49:25 PM	SIGNED			
2550	Mahathi Narem	mahathi.narem@dhs.ga.gov	SRS	OIT	4/14/2020 10:31:17 AM	PENDING			

Signer	Email	Signing Order	Alternative Participant	Status	UpdatedOn	View	Grant
Mahathi Narem	mahathi.narem@dhs.ga.gov	1	No	SIGNED	4/14/2020 10:33 AM		
Sreekanth1 Aaluru	Sreekanth1.Aaluru@dhs.ga.gov	2	No	PENDING			

4. Enter the **email address** of the alternate signer.
5. Click **Ok**.



6. The user will be added to the Signers grid.

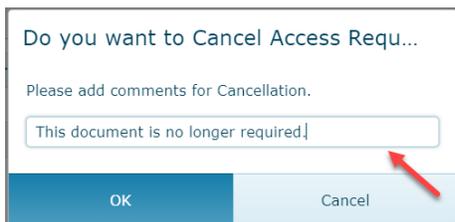
2.2.7 Cancel Workflow

If a document no longer requires signatures or must be removed for other reasons, the workflow can be cancelled.

1. Select **Requests** from the menu options.
2. Navigate to the **request**.
3. Click the arrow next to the **Access Request Id**.
4. Under the **Cancel** column click the **red x** icon.



5. A popup will appear to enter **cancellation reason**.
6. Enter **reason**.



7. Click **Ok**.

Access Request has been Cancelled Successfully



8. The **Status** field will now show Cancelled.

Requests

Requests From Requests To -Select Form- -Form Status-

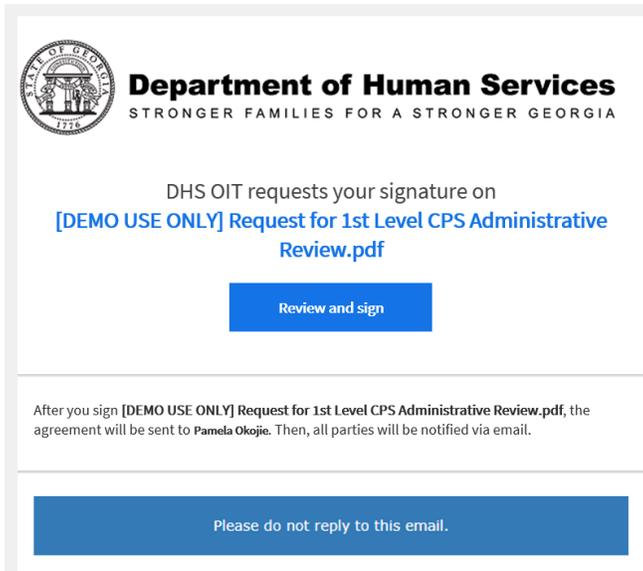
Search by User Name or Email or Form Name

Access Request Id	User Name	Email	Form Name	Agency Name	Requested On	Status
▶ 2883	Pam Okojie	pamela.okojie@dhs.ga.gov	SRS	Admin	7/13/2020 10:25:00 AM	SIGNED
▶ 2863	Pam Okojie	pamela.okojie@dhs.ga.gov	SRS	Admin	7/10/2020 1:44:43 PM	CANCELLED

2.2.8 Decline Request

A requested signer has the option to decline to e-sign the document sent to them. When a signer declines to sign, the request is canceled. The sender and all signers are notified by email that the document has been cancelled.

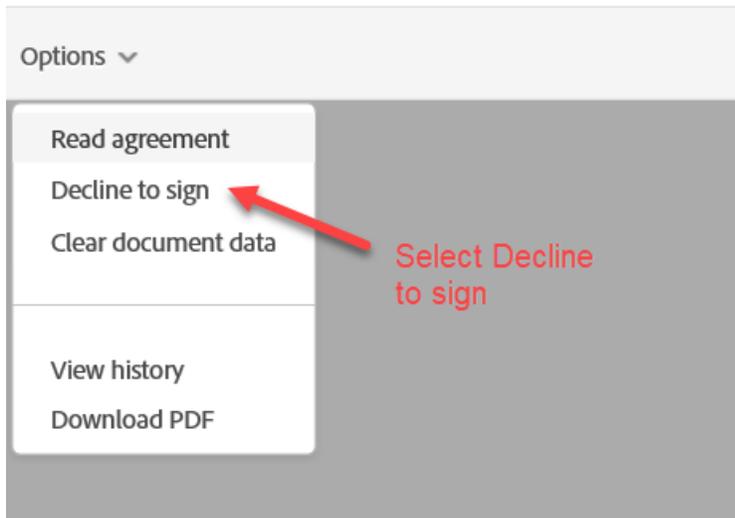
1. Request to e-sign received.



2. Click **Review and Sign**.

3. Click **Options** arrow found at top left of document.

4. Select **Decline to sign**.



5. Enter reason for declining.

Decline this agreement

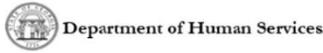
Please provide a reason for declining this agreement.

This document is not complete.

Cancel Decline

6. Click **Decline**.

7. The requested signer will receive an email stating “You have declined to sign...”



You declined to sign “[DEMO USE ONLY] Request for 1st Level CPS Administrative Review.pdf”.

We'll notify all relevant parties that you declined to sign.

8. Additionally, an email will be sent to all parties notifying them the document has been cancelled.

AS Adobe Sign <echosign@echosign.com>
To Okojie, Pamela

Reply Reply All

If there are problems with how this message is displayed, click here to view it in a web browser.



Department of Human Services
STRONGER FAMILIES FOR A STRONGER GEORGIA

[DEMO USE ONLY] Request for 1st Level CPS Administrative Review.pdf Agreement Exchange Canceled

Reason: Will not sign this document: This document is not complete.

Document Title: [DEMO USE ONLY] Request for 1st Level CPS Administrative Review.pdf

Status: Canceled

Parties:

Pamela Okojie ()

Pamela Okojie ()

DHS OIT (DHS OIT)

Pamela Okojie () has terminated

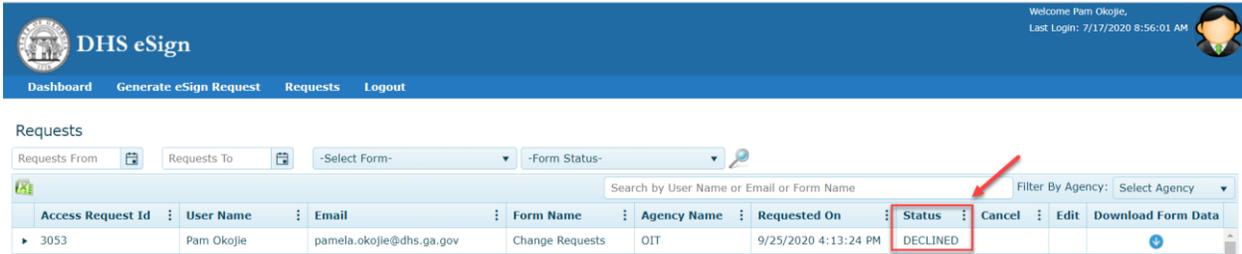
the agreement exchange for [DEMO USE ONLY] Request for 1st Level CPS Administrative Review.pdf.

All parties to the transaction have been notified

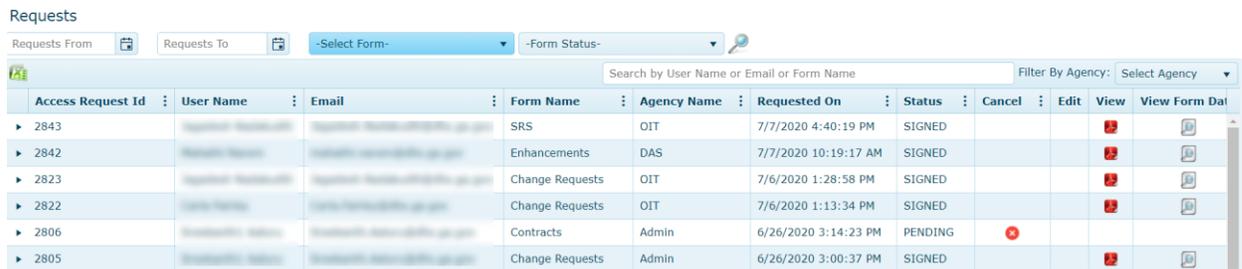
accordingly, and the document has been deleted from

all parties' Adobe Sign accounts.

9. The status will be changed to **Decline** on the Request Tab.



2.3 Request



The request screen lists of eSign documents that have been generated. There are multiple filters available to help navigate through the data:

Filters

- Request From Date
- Request To Date
- Select Form
- Select Status
- Search field – Enter User Name, Email or Form Name
- Agency

Once filter(s) are selected the grid below will be populated.

Grid Columns

- Access Request ID
- User Name
- Email
- Form Name
- Agency Name
- Requested On
- Status

- Pending
- Signed
- Declined
- Cancelled
- Cancel
- Edit View
- View Form Data
- Download Data

To search for a record using the Username:

1. Enter the users name in the **Search** field.
2. The grid will automatically start to update based on the information being entered.

Requests

Requests From  Requests To  -Select Form- -Form Status- 

Access Request Id	User Name	Email	Form Name	Agency Name	Requested On	Status	Cancel	Ec
▶ 2687			GA DOL - Form DOL-4N	OFS	4/24/2020 5:08:19 PM	SIGNED		
▶ 2686			Basic Expenditure Form	OFS	4/24/2020 5:03:45 PM	SIGNED		

To search for a record using Date Parameters:

1. Enter **Request From** date in format “1/1/2020” or select date from date selector tool.
2. Enter **Request To** date in format “1/1/2020” or select date from date selector tool.
3. Click **Search** icon.

Requests

1/1/2020  7/1/2020  -Select Form- -Form Status- 

Access Request Id	User Name	Email	Form Name	Agency Name	Requested On	
▶ 2687			GA DOL - Form DOL-4N	OFS	4/24/2020 5:08:19 PM	
▶ 2686			Basic Expenditure Form	OFS	4/24/2020 5:03:45 PM	

3 Disclaimer

1. All the information used for preparing the User Manual is fictitious including the names.
2. For the current UAT URL, please check with your immediate manager.