

DOCUSIGN HOW-TO GUIDE

Once your project has been approved by MOHCD Community Development staff in GMS and a PDF version of the grant agreement has been generated, please follow these instructions to successfully sign your grant agreement using DocuSign:

1. When your grant agreement is ready to be signed, Community Development's Operations Manager will contact your Executive Director and GMS contact person (if different) by email to request the following information about your signatory:
 - Name
 - Email Address
 - Cell Phone Number

The Name is needed for display on the grant agreement signature page. The Email Address is needed for DocuSign to contact the signatory when the grant agreement is ready to be signed. The Cell Phone Number is needed for two-factor authentication to prove the identity of the signatory. In this email, we will also request a completed version of your Appendix B, which lists your active contracts with all City departments.

You may provide this information directly to michael.king@sfgov.org, or wait to be prompted by Community Development's Operations Manager.

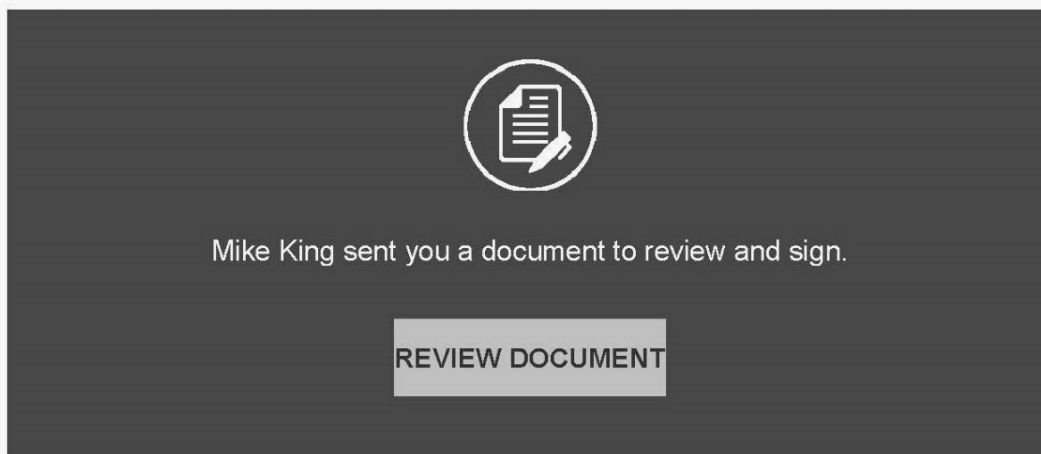
2. Once you provide this information, our Operations Manager will upload your blank grant agreement into DocuSign and set the routing sequence to the appropriate signatories. The grant agreement will route to your signatory first, followed by the City Attorney's Office and MOHCD's Director. The final signatory, the Mayor, will continue to sign hard copy versions of grant agreements.



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3. Your signatory will receive an email from DocuSign that looks like this:

DocuSign



Mike King
michael.king@sfgov.org

Please click the Review Document button to sign your MOHCD grant agreement for project 125206-19.

4. Click the Review Document button. It will open up a DocuSign SMS Authentication request page in your default browser. Click the Send SMS button to receive your access code.
5. You will receive a text message with your access code. Enter the six-digit code in the box provided, and click Confirm.
6. This takes you to a DocuSign webpage asking you to consent to using electronic records and signatures. Check the box next to "I agree to use electronic records



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and signatures, and click the Continue button.

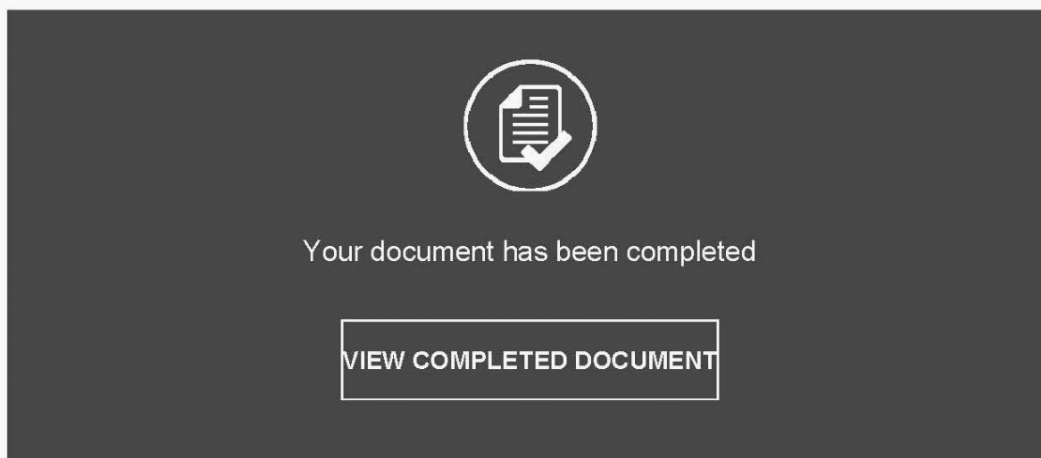
7. You will now see your grant agreement in DocuSign. You can scroll to review the entire document. Click the Start button to go immediately to the part of the grant agreement where you need to sign.
8. Click the Sign button with the downward pointing arrow on the grantee signature line of your grant agreement.
9. This will prompt DocuSign to ask you to Adopt Your Signature. You cannot edit your Full Name or Initials. If you need to change this information, contact michael.king@sfgov.org. You can change the style of your signature by clicking the Change Style link under Select Style and selecting the style of your choice. You also have the option to draw your signature by clicking Draw and using your cursor to write your signature.
10. Once you have finalized your signature, click Adopt and Sign. Your chosen signature will now appear on the grantee signature line of the grant agreement. Your Print Name has already been pre-populated underneath your signature.
11. Enter your Title. You must click on the red box next to Title to type in your official title related to the grantee (e.g., Board President, or Executive Director). Please check the spelling of your title.
12. Click the Finish button. Your signature has been recorded, and your grant agreement will now be routed to the City Attorney's Office for its review and signature.
13. DocuSign will ask if you want to save a copy of the document. We encourage



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you to choose the No Thanks option. You will eventually receive an email (see below) with a PDF version of the document once MOHCD's City Attorney and Director sign:

DocuSign



Mike King
michael.king@sfgov.org

All parties have completed Please DocuSign MOHCD Grant Agreement for Project 125206-19.

Please click the Review Document button to sign your MOHCD grant agreement for project 125206-19.

14. After the Mayor signs your grant agreement, Community Development's Operations Manager will email your Executive Director and GSM contact (if different) the executed PDF version of your agreement. Expect to receive the executed version within three weeks of completing your signature.

