

# DocuSign Instructions and Common Questions

## For Grant Agreements

DNRC Conservation and Resource Development Division has moved to electronic signatures on all agreements using DocuSign.

### How it works:

You'll receive an email from CARDD DocuSign requesting your signature on a document. Simply click on the link, fill in the spaces and click to sign the document. Once you click Finish, DocuSign will automatically send that document back to DNRC for signature. After DNRC signs the agreement, a copy will be sent back to you via DocuSign.

? I'm not ready to sign.

See [What if I'm not ready to sign?](#)

? I'm not the authorized signer.

See [What if I'm not the authorized signer?](#)

? I want to save a copy of this.

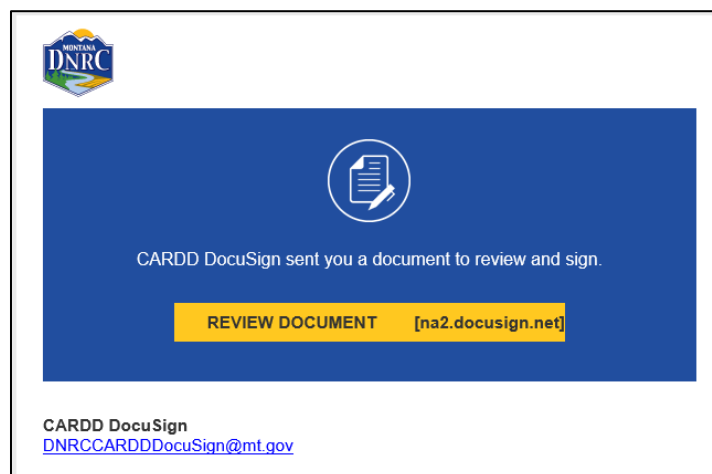
DocuSign will send a copy of the executed agreement to the authorized signer after completion. If you want to download a copy of the agreement before signing it, see [Can I download a copy before signing?](#)

? We need to approve this before signing.

See [What if we still need to approve this agreement before signing?](#)

### How to Sign:

1. DNRC will send an email to the authorized signatory.
2. Open the email. Click **Review Document** button.



3. DocuSign will open on your internet browser. You will see a preview of the document that was sent.

4. To sign, click **Continue**.

Please Review & Act on These Documents

CARD D DocuSign  
Montana Department of Natural Resources and Conservation

Powered by docuSign

Please review the documents below.

Grant Number: [Grant Agreement Number] Submittable ID: [Submission ID]

Recipient: [Recipient Name]

Project Title: [Project Title]

DNRC Contact: [Grant Manager]

**CONTINUE** OTHER ACTIONS ▾

5. Click **Start**

**START**

DocuSign Envelope ID: 621364F5-AA0C-4949-AE4C-998B03083922

CONSERVATION AND  
DEPARTMENT OF NATURAL RESOURCES AND CONSERVATION

6. Click **Sign**

**SIGN**

Required - Sign Here

Sign

Department of Natural Resources and Conservation

By: DNRC Signature

Heidi Anderson Folnagy

7. Click **Finish**

**FINISH** OTHER ACTIONS ▾

I further certify that the project or activity complies with all applicable state, local, and federal laws and regulations.

I further certify that I am authorized to enter into and sign a binding Agreement with the Department of Natural Resources and Conservation.

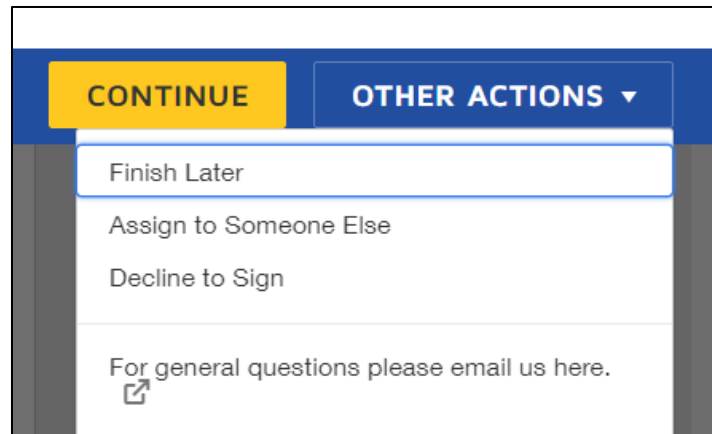
A facsimile, photocopy or electronic copy of the signature below shall have the same force and effect as an original signature and an electronic signature shall be regarded as an original signature.

8. After DNRC signs the agreement, you will receive a copy from DocuSign.

## Common Questions:

### What if I'm not ready to sign?

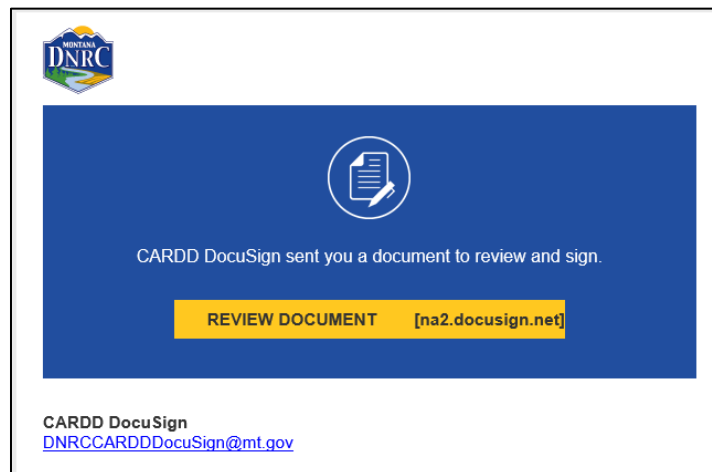
1. Simply close the browser window or click **Other Actions** and **Finish Later**. You'll need to click the link from the email to return to sign the document.



### What if I'm not the authorized signer?

#### Option 1: Assign to Someone Else

1. Open the email. Click **Review Document** button.



2. DocuSign will open on your internet browser. You will see a preview of the document that was sent.

3. Click **Other Actions**

The screenshot shows a document review interface. At the top, a blue bar contains the text "Please review the documents below." and two buttons: "CONTINUE" (yellow) and "OTHER ACTIONS" (blue with a dropdown arrow). Below this bar, there are three rows of information: "Recipient: [Recipient Name]", "Project Title: [Project Title]", and "DNRC Contact: [Grant Manager]". To the right of this information, a dropdown menu is open under the "OTHER ACTIONS" button, showing three options: "Finish Later", "Assign to Someone Else", and "Decline to Sign".

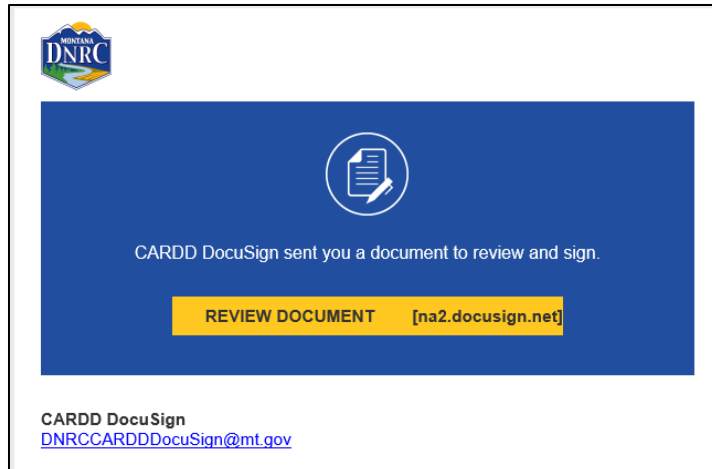
4. Click **Assign to Someone Else**. This allows you to forward the document to a different person for signature. DNRC will see that the document was forwarded.

The screenshot shows a dialog box titled "Assign to Someone Else" with a close button (X) in the top right corner. Inside the dialog, there are three input fields: "New Signer's Name \*" (with a red asterisk), "New Signer's Email \*" (with a red asterisk), and a text area labeled "Provide a reason for assigning to someone else" with a speech bubble icon. Below the text area, it says "250 characters remaining". At the bottom of the dialog, there is a note: "The sender and the new signer will be notified of these changes. You will be added as a Carbon Copy (CC) recipient." and two buttons: "ASSIGN" (yellow) and "CANCEL" (gray).

5. Fill in the New Signer's Name, New Signer's Email and provide a reason for assigning to someone else. Remember, agreements must be signed by someone legally authorized to sign them.
6. Click **Assign**. The document will be forwarded to the new signers and DNRC will be notified of the change.

Option 2: Decline to Sign

1. Open the email. Click **Review Document** button.



2. DocuSign will open on your internet browser. You will see a preview of the document that was sent.
3. Click **Other Actions**

Please review the documents below.		CONTINUE	OTHER ACTIONS ▾
Recipient:	[Recipient Name]	Finish Later	
Project Title:	[Project Title]	Assign to Someone Else	
DNRC Contact:	[Genl Manager]	Decline to Sign	

4. Click **Decline to Sign**. You will see the following warning.

Caution

If you select **CONTINUE**, this document will be voided.

To request changes to this document, please select **CANCEL** and contact the sender directly with your request.

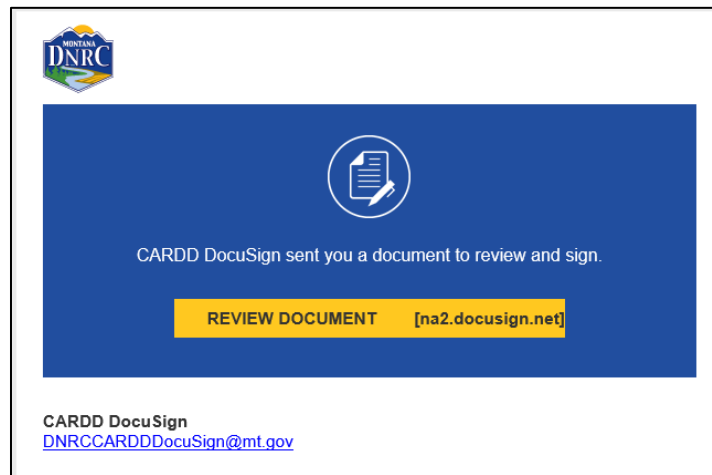
You can exit signing and save the information you've entered by using the **FINISH LATER** option in the **OTHER ACTIONS** menu.

CONTINUE

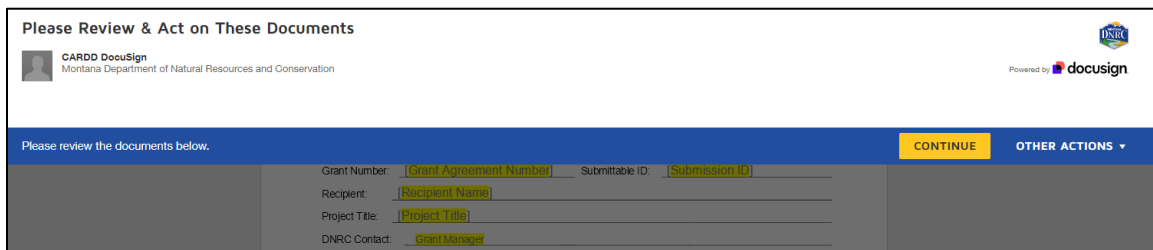
CANCEL


## Can I download a copy before signing?

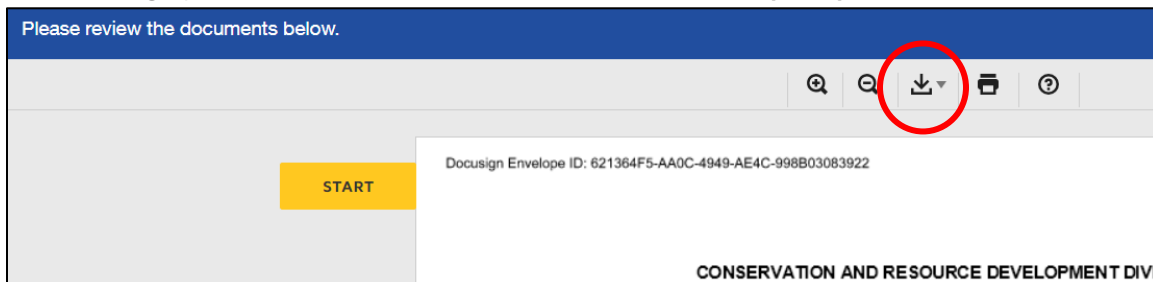
1. Open the email. Click **Review Document** button.



2. DocuSign will open on your internet browser. You will see a preview of the document that was sent.
3. Click **Continue**.



4. On the grey bar above the document click the **download** (  ) button.



## What if we still need to approve this agreement before signing?

### Option 1: Wait to Sign

1. Simply wait to sign the agreement by following the instructions to [Finish Later](#).
2. The link in the DocuSign email will stay active. When you have been approved to sign, simply return to the email and follow the steps above (see [How to Sign](#)).

### Option 2: Send agreement to appropriate staff to hold for signature

1. Please let your grant manager know if the agreement needs to be sent to a different staff member before signature. DNRC will only send it to one staff member for signature and cannot send it to multiple members. Your grant manager will contact the CARDD DocuSign team.

The agreement is not effective if an unauthorized person has signed the agreement.

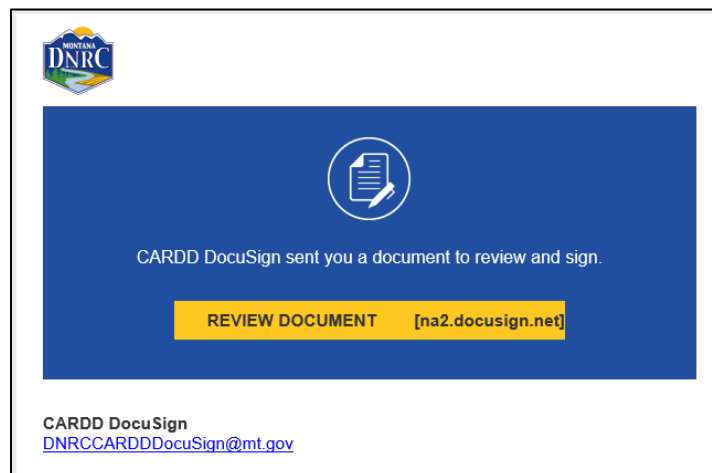
2. Once the agreement has been approved, the designated staff member must forward the signature delegation to the authorized person by following the instructions to [Assign to Someone Else](#).

### Option 3: Additional Signatures Required to be Effective

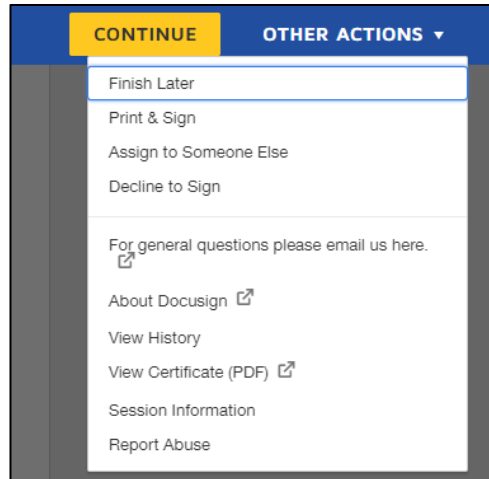
See [What if we need additional signatures for approval?](#)

## What if we need additional signatures for approval?

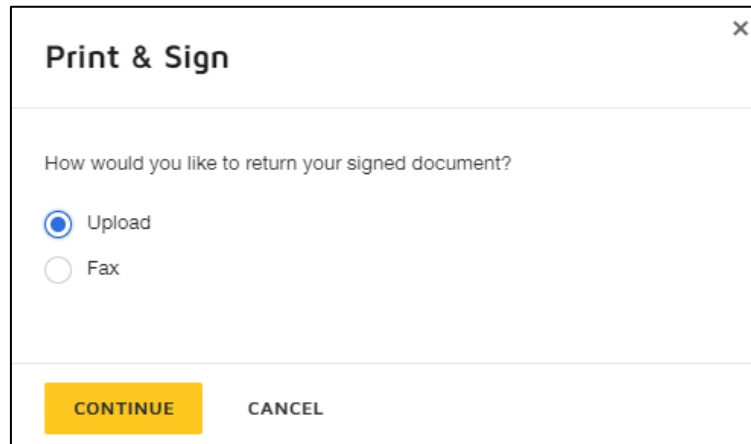
1. Please let your grant manager know if you need to add additional signatures. Your grant manager will contact the CARDD DocuSign team to let them know to turn on [Print & Sign](#) for your agreement.
2. Open the email. Click **Review Document** button.



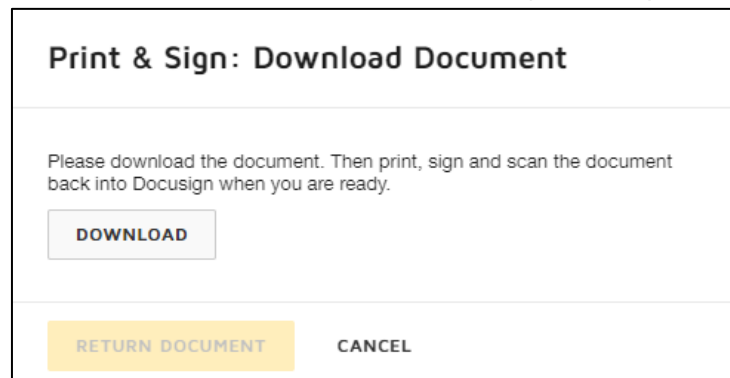
3. DocuSign will open on your internet browser. You will see a preview of the document that was sent.
4. Click **Other Actions**



5. Click **Print & Sign**
6. On the pop-up, choose to upload the document



7. Click **Download**. This will download the document to your computer for you to print.



8. Move the printed document through your internal process and add signatures as needed to the signature page only. Do not cover the space for DNRC Signature. Do not modify the document in any other way.
9. Scan the signature page only. Do not return the other pages of the agreement.
10. Return to the DocuSign email. Follow Steps 2 – 3 above.



11. Click **Return Document**

### Print & Sign: Download Document

Please download the document. Then print, sign and scan the document back into DocuSign when you are ready.

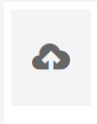
DOWNLOAD

RETURN DOCUMENT CANCEL

12. Click **Upload a File** or drag and drop the document into the space provided.

### Print & Sign: Return Document

UPLOAD A FILE



**Drag & drop document here**  
or use **UPLOAD A FILE** to browse and select

FINISH CANCEL

13. Click **Finish**. DocuSign will automatically return the document to the DNRC Team to review and send for DNRC signature. You will receive a copy of the executed agreement once it is signed.

### Print & Sign: Return Document

Complete\_with\_Docusign\_Clerk\_Agreement\_Examp.pdf  
14 pages

FINISH CANCEL