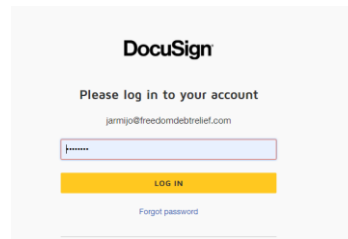


## How To send a Start Date Amendment - DocuSign



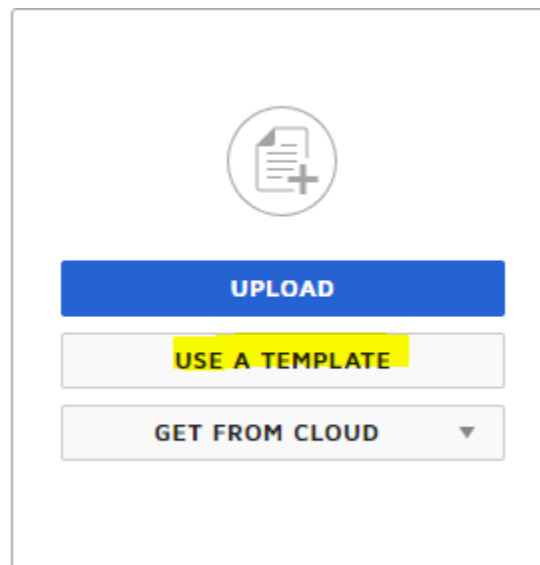
1. Log into your DocuSign Account.



2. On the home page, click on "NEW." Then in the drop down click on, "Send an Envelope."



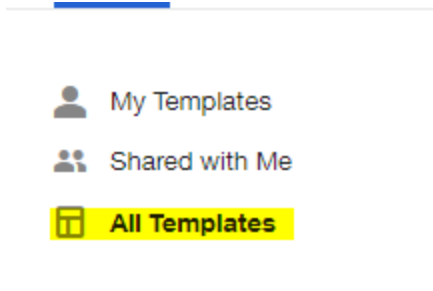
3. On the next page click on, "USE A TEMPLATE."



## How To send a Start Date Amendment - DocuSign



- Another window will pop up, now click on, "All Templates."



- In the search field, type, "Start Date Amendment." After you hit enter all Amendments for Start Date will populate. Please select the according Amendment, based on the file being for 1 or 2 clients and the draft frequency selected by the client.

### Select Templates

**BROWSE**   **SELECTED**

My Templates

Shared with Me

All Templates

Folders

▶ Shared Folders

Name	Owner	Last Change ▾
<input type="checkbox"/> FDR Start Date Amendment_091012_Two Clients	John Smith	8/21/2019   02:27:19 pm
<input type="checkbox"/> FDR Start Date Amendment_091012_Single Client	John Smith	8/21/2019   02:26:47 pm
<input type="checkbox"/> FDR_Bi-Weekly Draft Start Date Amendment_One Client_052511	John Smith	7/31/2019   01:03:57 pm
<input type="checkbox"/> FDR_Start Date Amendment_Monthly Draft Amount	Lizette Galvan	7/30/2019   01:33:21 pm
<input type="checkbox"/> FDR_Split Draft Start Date Amendment_One Client_052511	John Smith	7/29/2019   10:28:21 am
<input type="checkbox"/> FDR_Start Date Amendment_Immediate_One Client_071510	John Smith	7/18/2019   01:58:07 pm
<input type="checkbox"/> FDR_Bi-Weekly Draft Start Date Amendment_Two Clients_052511	John Smith	6/25/2019   08:52:41 am
<input type="checkbox"/> FDR_Start Date		

## How To send a Start Date Amendment - DocuSign



- Once you have selected the correct Amendment, check mark the box next to the stated documents and then click on, "ADD SELECTED."

Select Templates

BROWSE    SELECTED (1)

My Templates

Shared with Me

All Templates

Folders

Shared Folders

Start Date Amendment

Name	Owner	Last Change
<input type="checkbox"/> FDR Start Date Amendment_091012_Two Clients	John Smith	8/21/2019   02:27:19 pm
<input checked="" type="checkbox"/> FDR Start Date Amendment_091012_Single Client	John Smith	8/21/2019   02:26:47 pm
<input type="checkbox"/> FDR_Bi-Weekly Draft Start Date Amendment_One Client_052511	John Smith	7/31/2019   01:03:57 pm
<input type="checkbox"/> FDR_Start Date Amendment_Monthly Draft Amount	Lizette Galvan	7/30/2019   01:33:21 pm
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<input type="checkbox"/> FDR_Bi-Weekly Draft Start Date Amendment_Two Clients_052511	John Smith	6/25/2019   08:52:41 am
<input type="checkbox"/> FDR_Start Date		

ADD SELECTED    CANCEL

- The pop up window will disappear and then you will enter the fields for Name and Email in the Signer box. Add additional recipients as necessary. Please make sure each recipient is set to, "NEEDS TO SIGN."

Please DocuSign this document: FDR Start Date Amendment\_091012\_One Client.pdf

Add Documents to the Envelope

Upload

USE A TEMPLATE

GET FROM CLOUD

Add Recipients to the Envelope

As the sender, you automatically receive a copy of the completed envelope.

☐ Set signing order

Signer

Name \*

Jaclyn Armijo

Email \*

jarmijo@freedomdebtreief.com

NEEDS TO SIGN

ADD RECIPIENT

## How To send a Start Date Amendment - DocuSign

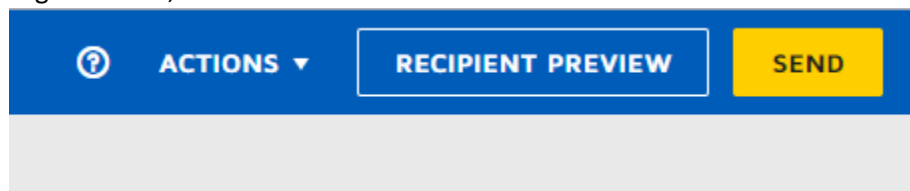


8. Once the Signers are filled in, click on, “NEXT.” (The NEXT button will be in the upper and lower right hand of the screen.) The Recipient View is pretty cool, as it lets you see how the client views the document from their desk top, tablet, or phone.



9. Now you will fill in the new draft information. There will be a text box, once you double click on the text box, it will allow you to enter in text. Or you can use the Column to the left as a box will appear to enter text.

10. Now once everything is filled in, click on “SEND.”



11. Once client signs you will receive an email with the completed docs, upload them to the CAP file and status as needed for UW to review.