

## How To send a Start Date Amendment - DocuSign



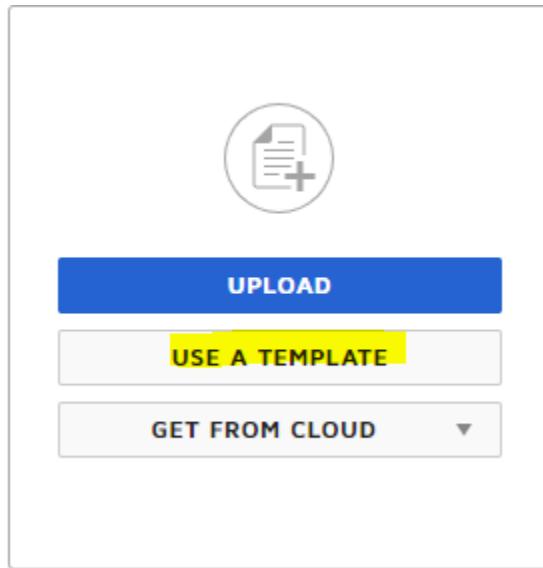
1. Log into your DocuSign Account.



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



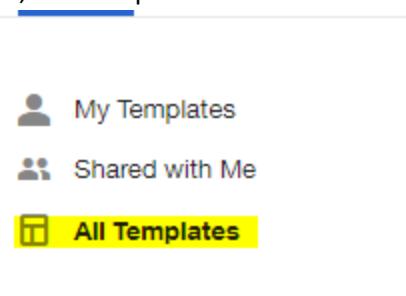
3. On the next page click on, “USE A TEMPLATE.”



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



5. 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.

A screenshot of a 'Select Templates' dialog box. On the left, there's a sidebar with 'BROWSE' and 'SELECTED' tabs, and buttons for 'My Templates', 'Shared with Me', and 'All Templates' (which is selected). Below that is a 'Folders' section with 'Shared Folders'. The main area has a search bar containing 'Start Date Amendment'. A table lists several templates, each with a checkbox, name, owner, and last change date. Some names and parts of names are highlighted with yellow boxes.

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

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- 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

Start Date Amendment

Name	Owner	Last Change
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
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

freedom

RE: AMENDMENT DE CONTRAT

Please review the following amendment to the Debt Reduction Program.

Please review the following Amendment to the Debt Reduction Agreement you entered into with us.

This document contains information that is confidential and privileged. It is intended for your eyes only. If you have received this document in error, please return it to us.

Amount and Account:

FDR Start Date Amendment\_09...  
1 page  
1 Template Applied

**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	NEEDS TO SIGN	MORE
Name: Jaclyn Armijo	<input checked="" type="checkbox"/>	
Email: jarmijo@freedomdebtrelief.com	<input checked="" type="checkbox"/>	

**ADD RECIPIENT**

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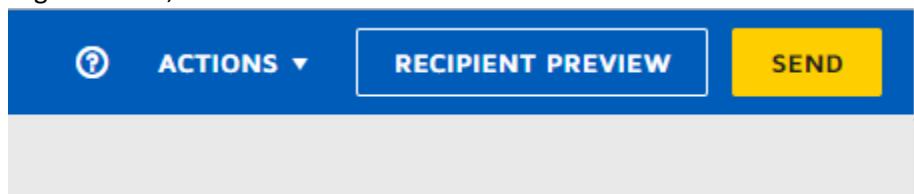


8. Once the Signers are filled in, click on, "NEXT." (The NEXT button will be in the upper and lower right hand of the screen.) The Recipient View is pretty cool, as it lets you see how the client views the document from their desk top, tablet, or phone.



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.