# Docusign Accessibility Training

1. Create a visual form in Word or Docs (don’t use PDF)
   1. use Headings, Lists, etc.
   2. Use underscore to indicate places to enter information
   3. Use 5 underscores (or 1 tab) to make space for radio buttons or checkboxes
   4. Use a minimum of 1.25 line spacing to ensure room for form controls.
2. Login to Docusign (https://account.docusign.com/#/username)
3. From the home page select the NEW button, choose SEND AN ENVELOPE
4. Click the UPLOAD button if you have a Word document; or GET FROM CLOUD to use your Google Doc
5. Select your document. It will appear on your Docusign page.
6. Add a Recipient to the envelope (Full name and email address)
7. Click on the NEXT button
8. You are now in the form editing screen. You will add the appropriate text input boxes, radio buttons, checkboxes, and signature areas.
9. On the left side of the screen are the Standard Fields. Some are specific like Name, Email, and Title. Some are general like Text, Checkbox, and Radio. We will use these to make boxes on the form so the user can input requested information. These all use a click and drag interface.
10. You will be adding information to these fields. The information added will NOT appear on the screen, but all will be spoken by the screen reader.
11. Adding a Name box (same for Email, Company, Title, and Text boxes)
    1. Find the place on the form where the user will need to type their Name (this is not the signature).
    2. In the STANDARD FIELDS (left side of the screen) click and drag the NAME box to the proper place on the form.
    3. On the right side of the screen, field information appears. These allows you to add accessibility information and change the formatting (font size and family)
    4. First you choose FULL NAME, FIRST NAME, or LAST NAME as appropriate.
    5. Next set the FORMATTING of the text to be entered. Always set font-family (Verdana or Arial) and font-size (minimum 12 point)
    6. Leave the DATA LABEL alone
    7. TOOLTIP is where you add **unique** short instructions of what the user is supposed to type in the box you have created. This is critical for accessibility.
       1. For example, a form has 2 name areas, one for students name and one for parents name. You would create a unique tooltip for each box… “Student name” and “Parent Name”
       2. If you have 2 or more fields with the same name, number them in the tooltip… Session 1 title, Session 2 title
       3. If there are additional related times, number them also… Session 1 Description, Session 2 Description, etc.
12. Add CHECKBOX(es)
    1. In the STANDARD FIELDS click and drag the CHECKBOX box to the proper place on the form.
    2. In the Field Information on the right side choose if the checkbox should start as checked or unchecked.
    3. FORMATTING - choose at least 14 as font size to make it easy to see.
    4. TOOLTIP - add appropriate text. Be sure to include important parts of the question in the answer. E.g. if the question is   
       Empty my bank account? Yes No.   
       Then the tooltip for the Yes/No would be   
       “Yes - empty my bank account” or “Empty my bank account - Yes”  
       “No - empty my bank account” or “Empty my bank account - No”
    5. If you have a 2 part question where you have a checkbox followed by a text box make sure they on the same level
       1. [ ] Special room configurations (describe): \_\_\_\_\_\_\_\_
       2. In the field information look for LOCATION, PIXELS FROM THE TOP. Make sure the numbers for checkbox and textbox are the same, or the checkbox is at least one less than the number for the textbox. That is, the checkbox is at least one pixel closer to the top of the page, and the edit box is lower. This ensures that the checkbox is read by the screen reader first.
    6. If there are multiple checkboxes that are related, use the tooltip to indicate the number of items
       1. Audio Visual needs 8 items - 1 Microphone
       2. 2 document projector
       3. 3 Internet access ...
13. Add RADIOBUTTON(s)
    1. In the STANDARD FIELDS click and drag the RADIOBUTTON box to the proper place on the form.
    2. In the Field Information on the right side choose if the radiobutton should start as checked or unchecked.
    3. GROUP LABEL - is the overall title or **question** for the group of radio buttons. A dotted blue line will surround all radiobuttons in the same group.
    4. RADIO BUTTON VALUES - for each radio button enter the appropriate text to be spoken.
    5. FORMATTING - choose at least 14 as font size to make it easy to see.
14. You can edit/replace the underlying document and leave the Docusign fields intact. When you replace the documents, simply drag the fields to their proper location.
    1. From Templates, click on the down triangle next to the USE button on the right
    2. Choose Edit
    3. Under the “Add Documents to the Template” find the thumbnail of the document.
    4. Click on the 3 dot Menu (says “More Options” when you hover on it) on the right below the thumbnail.
    5. Choose REPLACE
    6. Choose your local document from the file tool that pops up.
    7. Hit ENTER
    8. Adjust form field placement as needed.