



# CTR JOB AID

## Using DocuSign for CASL Form-Vendor

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## OVERVIEW

This job aid provides details on how to:

- Electronically fill out, sign, and submit CASL Form.

## BEFORE YOU BEGIN

DocuSign is a cloud-based application for the electronic signature and submission of select CTR forms. This creates efficiencies for both departments and CTR. The use of DocuSign for the CASL must follow the guidelines included in the [Acceptable forms of signature memo](#).

### DocuSign Key Terms

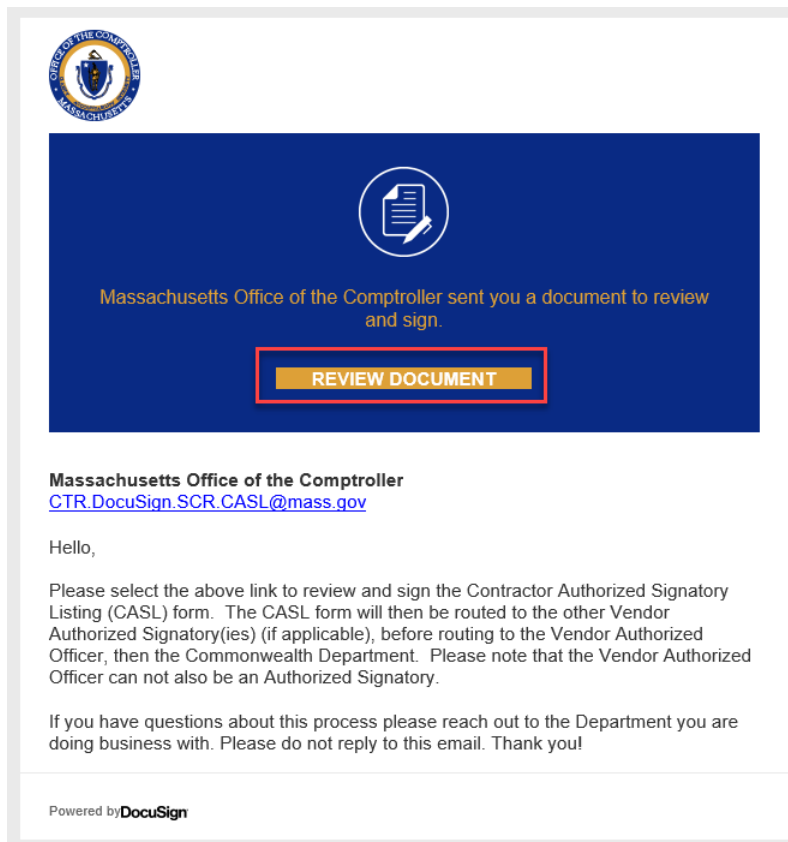
- **Envelope:** a container or "package" that is used to send documents to recipients and manage transactions.
- **Template:** a pre-set envelope with official CTR forms, set recipient roles, tabs, and other business logic. Templates are reusable blueprints for any DocuSign workflow you do repeatedly.
- **PowerForm:** a template that is accessed from a unique, secure URL to generate an envelope.

All that is needed to use the PowerForm is access to a web browser and a valid email address. PowerForms can be filled out using either a PC or mobile device.

## DIRECTIONS

### Step 1: For the Vendor Electronically Signing the Form

1. An email from **Massachusetts Office of the Comptroller via DocuSign** with the subject: **Complete with DocuSign: CASL from[[Commonwealth Department Sender\_UserName]]** will arrive in the email box the Department provided for the Vendor.
2. Open the email and select **Review Document**.



3. The CASL form will open in a new page. To begin filling out the form, select **Continue**.

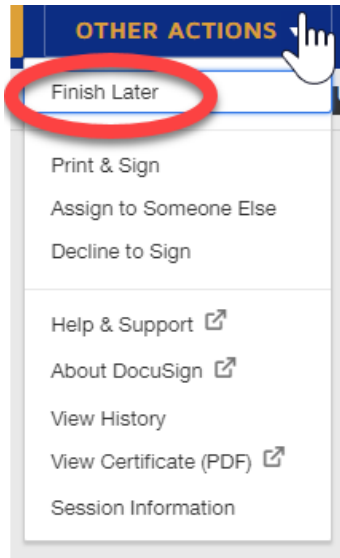


4. You will now be able to begin filling out the form. You can either choose **Start** to be guided through filling out the form or you can select the fields you wish to start with.



5. All fields outlined in **RED** are required fields to be filled out by the Vendor.



6. If you need to come back to the form to finish filling it out later, you can select **Other Actions** in the upper right corner and then select **Finish Later**. In order to access the form again, go back to the original email and select **Review Document** again.



7. There are three options when signing the form:

**i. Vendor Role to Sign**

- a. If the person who was sent the form as the Vendor role and who has filled out the form is an Authorized Signatory, then select the **Sign** button on the Authorized Signature line. The **name** and **email address** fields are automatically prefilled and cannot be edited. Please fill out your **title** and **phone number**.

Authorized Signatory Name	Signature (Signature as it will appear on contract or other documents)	Title	Phone Number	Email Address
Gus Gus		Chief	555-555-5555	<input type="text"/>
Kathryn <input type="text"/>		<input type="text" value="Chief"/>	<input type="text"/>	<input type="text"/>

- b. The Office of the Comptroller has elected to accept two forms of electronic signature via DocuSign. You can either draw your signature using your mouse or finger (if working from a touch screen device); or you can upload a picture of your wet signature. The typed text of a signature is NOT an acceptable form of electronic signature.

- c. Verify your First and Last Name are typed into the **Full Name Box** as well as your initials in the **Initials Box**. Then choose either to **Draw** or **Upload** your signature, confirm it is legible, then select **Adopt and Sign**.

**Adopt Your Signature** x

Confirm your name, initials, and signature.

\* Required

**Full Name\***  **Initials\***

**DRAW** **UPLOAD**

**DRAW YOUR SIGNATURE** Clear

By selecting Adopt and Sign, I agree that the signature and initials will be the electronic representation of my signature and initials for all purposes when I (or my agent) use them on documents, including legally binding contracts - just the same as a pen-and-paper signature or initial.

**ADOPT AND SIGN** **CANCEL**

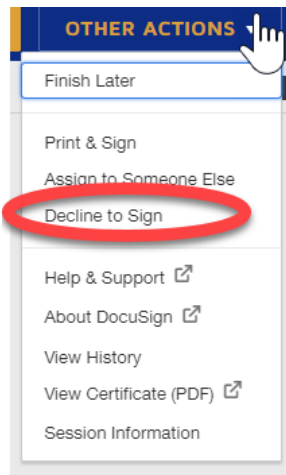
- d. Select **Finish** in the upper right corner. The envelope will now route to the other **Vendor Authorized Signatory roles** (if applicable) and **Vendor Authorized Officer** to sign.



- e. A pop-up box will appear asking if you would like to save a copy of the document. You can either **Download** or **Print**. If you do not wish to save a copy, you can select **Close**. You will receive a complete copy of the document once it has been completed.

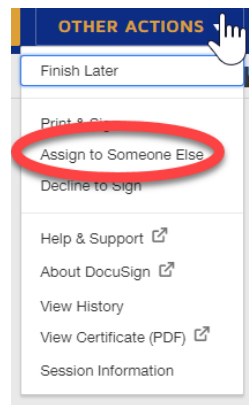
**ii. Decline to Sign**

a. If the Vendor does not want this process to continue and wishes to void the envelope, they can select **Decline to Sign**. Select **Other Actions** in the upper right corner, then select **Decline to Sign** from the Drop-down menu then select **Continue**. A Notification will be sent to the Commonwealth Department Sender that the Vendor has declined to sign and the envelope is void.



**iii. Assign to Someone Else**

a. To assign to someone else, select **Other Actions** in the upper right corner, then select **Assign to Someone Else** from the Drop-down menu.



b. Fill in the required information in the Assign to Someone Else box. Fill in the **email address** and **first and last name** of the **Authorized Signatory for the Vendor (New Signer)**. To reduce the likelihood of errors, please copy and paste the email address into the correct field. Please also provide a reason for changing signing responsibility. Select

**Assign to Someone Else.** An email will now be sent to the Authorized Signatory with a link to open for them to review and sign the form.

Assign to Someone Else ×

\* Required

**Email Address for the New Signer \***

**New Signer's Name \***

**Please provide a reason for changing signing responsibility**

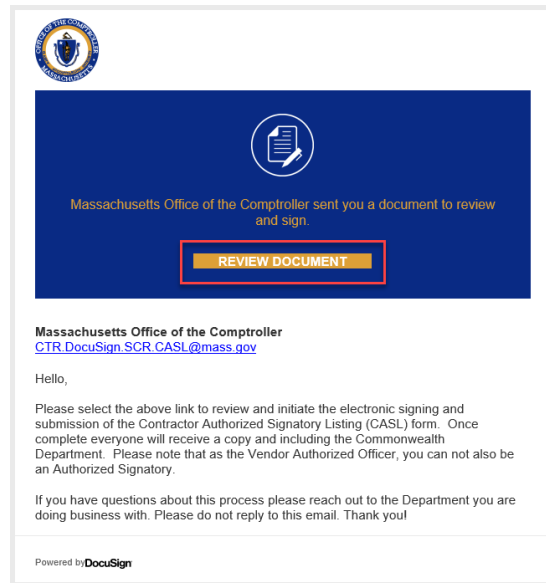
250 characters remaining

Selecting the Assign to Someone Else button will send a notification to the person to whom you assigned this envelope. The original sender will also receive a notification. You will be added as a Carbon Copy (CC) recipient.

**ASSIGN TO SOMEONE ELSE**      CANCEL

## Step 2: For the Vendor Authorized Officer

1. After the Authorized Signatory(ies) has completed filling out the form, an email from **Massachusetts Office of the Comptroller via DocuSign** with the **DocuSign: Complete with DocuSign: CASL from[[Commonwealth Department Sender\_UserName]]** will arrive in the email address provided for the Vendor Authorized Officer on the PowerForm Signer Information Page.
2. Open the email and select **Review Document**.



3. The CASL form will open in a new page.
4. Review the information that is included on the CASL and confirm that those listed on the form are Authorized Signatories.
5. Once all required fields have been filled out, the **Authorized Officer can electronically sign** the document. Please note that the Authorized Officer cannot also be an Authorized Signatory.
6. There are three options when signing the form:
  - a. **Vendor Authorized Officer Role to Sign**
    - i. If the person who was sent the form as the Vendor Authorized Officer role is an Authorized Officer, then select the **Sign** button on the Authorized Officer line. The **name, date** and **email address** fields are automatically prefilled and cannot be edited. Please fill out your **title** and **phone number**.

Signature	Date
Print Name	Phone Number
Title	Email Address

- ii. The Office of the Comptroller has elected to accept two forms of electronic signature via DocuSign. You can either draw your signature using your mouse or finger (if working from a touch screen device); or you can upload a picture of your wet signature. The typed text of a signature is NOT an acceptable form of electronic signature.
- iii. Verify your First and Last Name are typed into the **Full Name Box** as well as your initials in the **Initials Box**. Then choose either to **Draw** or **Upload** your signature, confirm it is legible, then select **Adopt and Sign**.

x

### Adopt Your Signature

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Confirm your name, initials, and signature.

\* Required

Full Name\*

Initials\*

DRAW
UPLOAD

DRAW YOUR SIGNATURE
Clear

By selecting Adopt and Sign, I agree that the signature and initials will be the electronic representation of my signature and initials for all purposes when I (or my agent) use them on documents, including legally binding contracts - just the same as a pen-and-paper signature or initial.

ADOPT AND SIGN
CANCEL

- iv. Select **Finish** in the upper right corner. The envelope has now been completed, everyone will automatically receive a completed copy, including the Department you are doing business with.

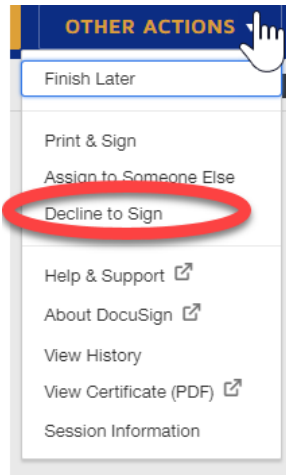


- v. A pop-up box will appear asking if you would like to save a copy of the document. You can either **Download** or **Print**. If you do not wish to save a copy, you can select **Close**. You will receive a completed copy of the document once it has been completed.



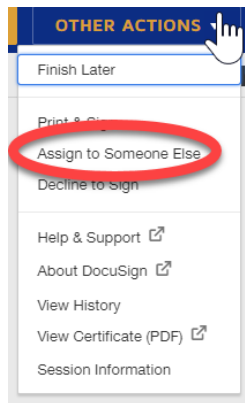
**b. Decline to Sign**

- i. If the Vendor Authorized Officer does not want this process to continue and wishes to void the envelope, they can select **Decline to Sign**. Select **Other Actions** in the upper right corner, then select **Decline to Sign** from the Drop-down menu then select **Continue**. A Notification will be sent to the Commonwealth Department Sender that the Vendor has declined to sign and the envelope is void.



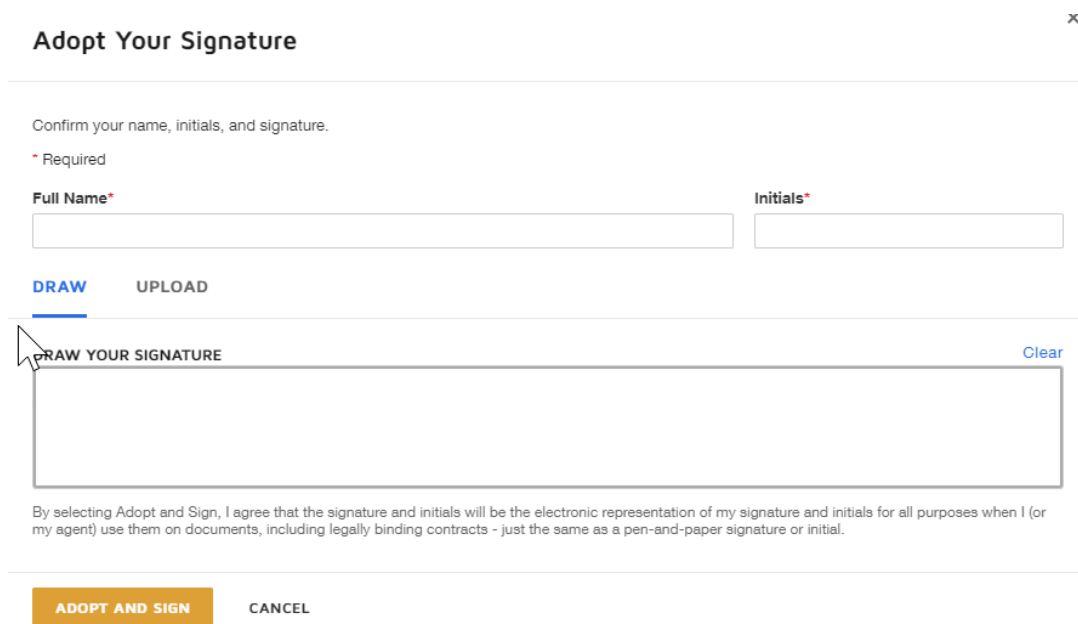
- c. **Assign to Someone Else:** If the person who was sent the form as the Vendor Authorized Officer role is not an Authorized Officer, then the form will need to be reassigned to the Authorized Officer.

- i. To assign to someone else, select **Other Actions** in the upper right corner, then select **Assign to Someone Else** from the Drop-down menu.



- ii. Fill in the required information in the Assign to Someone Else box. Fill in the **email address** and **first and last name** of the **Authorized Officer** for the Vendor (New Signer).

To reduce the likelihood of errors, please copy and paste the email address into the correct field. Please also provide a reason for changing signing responsibility. Select **Assign to Someone Else**. An email will now be sent to the Authorized Signatory with a link to open for them to review and sign the form.



iii. Select **Finish** in the upper right corner. The envelope is now complete, and a copy has been sent to all parties.



iv. A pop-up box will appear asking if you would like to save a copy of the document. You can either **Download** or **Print**. If you do not wish to save a copy, you can select **Close**.

7. The Envelope for the CASL is now complete. All parties will receive an email notification that the envelope has been completed.

## DISCLOSURE

You are responsible for actions made under your signature.

## **FOR ADDITIONAL QUESTIONS**

**If you have questions about this process, please contact the department you are doing business with.**