



Requirements for using DocuSign

DocuSign is the University approved electronic signing software which will be used to digitally sign agreements and other documents on behalf of the University.

All users of the DocuSign software need to ensure that they have read, understood and will adhere to the [Document Signing Delegations Policy](#) and these Requirements which outline when a document may be signed electronically and by whom.

The Policy and these requirements will be strictly enforced in order to protect the University and its staff.

Failure to follow these constitutes a breach by a staff member of their employment obligations.

1. Pre-requisites for access to DocuSign

- 1.1 You must be an eligible DocuSign user (see section two) and ensure the security of your device at all times.
- 1.2 Authorised signatories are required to submit an [Authorised Signatory Declaration Form](#) before they can use DocuSign to electronically sign on behalf of the University. This is to declare that they will not:
 - allow someone else to sign documents on their behalf,
 - permit another person to use their login details to sign on behalf of the authorised signatory.
- 1.3 Administrative users need their manager's approval to use DocuSign and must submit a [Request For Administrative Access Form](#).
- 1.4 [Training](#) is a requirement for using DocuSign (see section four).

2. Eligible DocuSign users

There are two different categories of DocuSign users:

- 2.1 **Authorised signatories:** are those with delegated authority to sign agreements and other documents on behalf of the University. Please refer to the current [Delegations](#) to see those with delegated authority.
- 2.2 **Administrative users:** are the staff who distribute documents for signing by Monash staff and external parties, or those with authority to sign documents for university internal use.

Section four of this document outlines the different training for these users.

3. When can DocuSign not be used?

DocuSign or any other authorised electronic signing system should not be used in certain situations. Specific advice is available from the [Office of the General Counsel](#) however generally the excluded situations include:

- 3.1 Deeds;
- 3.2 Any agreement involving the transfer of an interest in real property (ie. Land);
- 3.3 An agreement entered into with an international connection (a party is resident outside Australia, the agreement is to be performed at least in part outside Australia, or the governing law or jurisdiction is not that of an Australian jurisdiction) unless:
 - a. that connection is the UK, USA, Canada, Singapore or New Zealand;
 - b. specifically authorised to do so by the Office of the General Counsel;
- 3.4 Agreements relating to Student Services Amenities Fees (SSAF), financial assistance to students; or
- 3.5 Where the document expressly prohibits signing electronically.

For these types of documents follow the current process and [request legal assistance](#) from the OGC.

4. Training for eligible DocuSign users

Training is mandatory. The type of training required depends on the category of user:

4.1 Authorised signatories:

These signatories are to watch the Sign a Document in DocuSign training video. Alternatively (or additionally), they can also request assistance from [eSolutions](#) for a one- on-one demonstration of the software and to assist with the setup of their DocuSign profile.

The training video is available on the [How to Access and Use Systems](#) web page.

Note: Authorised signatories must complete an [Authorised Signatory Declaration Form](#) before accessing the system for the first time.

4.2 Administrative users:

These users are to watch the Sending Envelopes in DocuSign and Correcting In-Process Envelopes training videos. Administrative users that will also be creating templates and workflows in DocuSign will need to complete the Template Learning Plan too.

Users wishing to use DocuSign for internal administration purposes must also watch the Sign a Document in DocuSign training video.

The training videos and learning plan are available on the [How to](#)

[Access and Use Systems](#) webpage.

Note: Administrative users need their manager's approval to use DocuSign and must submit a [Request For Administrative Access Form](#).

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