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DocuSign Envelope Update

Resend or request a change to DocuSign envelope(s)

 **STATE PROCUREMENT BUREAU**

DocuSign Envelope Update

* Action to take on this envelope?

Resend signature request Update envelope

Enter additional recipient(s) that should also receive updates on this request

Lookup by name

If unable to locate recipient(s) by name, the email address(es) may be entered here

Comma separated: John@example.com, Jane@example.com

Add additional people that need to be notified of this change

Complete
Select Submit

Submit

Required information
Action to take on this envelope?

Required Information
This shows all the fields you need to complete.

Attachment
Click here to add an attachment if needed.

Add attachments

Select Action Type

- Resend signature request
- Update envelope

*Go to Page 2 for details on Action Type

ACTION TYPE– Resend Signature

Resend signature request

***NOTE:** If you have more than 4 contracts to resend, attach a document with the required information.

Resend signature request:

1. Select Resend signature request
2. Select No: one –four signatures
Select Yes: four or more signatures
- Proceed below depending on your answer.
3. Add any additional information pertaining to the request.

* Use the check box if you have more than one contract to resend.

- One-four signatures**
- Enter in contract information, if necessary enter in additional information.
- Four or more signatures**
- Use the paperclip icon in the lower right hand corner to attach a file containing the contract names and number (Word and Excel documents will upload).
 - Once you have attached the document, hit **Submit**.

ACTION TYPE-Update Envelope & Update Document

Update envelope– Add new envelope recipient

* Action to take on this envelope?
 Resend signature request Update envelope

* Contract Name 1 * Contract Number

How would you like to update this envelope? 2

Add new envelope recipient

* New Recipient First Name 3 * Assign an action to this recipient 4
 Receive a CC after envelope is complete
 Required to sign
 Required to view document

* New Recipient Last Name

* New Recipient Email Address * Where in the signing order will the signer need to sign? 5
Example - 3rd in order, before Joe after Jane.

Update current signer
 Update document

Any additional information? 6

UPDATE ENVELOPE

Add new recipient

1. Select Update envelope– enter in contract information
2. Select Add new envelope recipient.
3. Enter in First, Last name, and email address.
4. Assign what action is needed: Required to sign, Receive a CC after envelope is complete, or Required to view document.
5. Assign signing order
6. Add any additional info

Update current signer

1. Select Update envelope– enter in contract information
2. Select update current signer
3. Enter in current signer, then enter in the new signer.
4. Add any additional info

Update envelope—Update current signer

* Action to take on this envelope?
 Resend signature request Update envelope

* Contract Name 1 * Contract Number

How would you like to update this envelope? 2

Add new envelope recipient

Update current signer

* Current Signer First Name 3 * New Signer First Name

* Current Signer Last Name * New Signer Last Name

* Current Signer Email Address * New Signer Email Address

Update document

Any additional information? 4



ACTION TYPE-Update Document

Update envelope—Update document

Update document- NO

1. Select No
2. Use the paperclip icon to attach the corrected document
3. Please describe where on the document signatures are needed.

Update document

* Has the document been signed? 1 2  Use the paperclip icon in the lower right to attach the revised contract document

No Yes

* Please describe where on the document signers will need to sign. 3

John Doe will need to sign on Pages 10, 12, and 15. Jane will need to sign on pages 10 and 15.

Update document- YES

Update document

* Has the document been signed?

No Yes

Changes to the envelope cannot be made after it has been signed by anyone. Please return the contract record back to draft in Total Contract Manager, correct the contract, and resend for signatures.

Questions? Please contact the eMACS Help Desk at 406-444-2575 or email emacs@mt.gov.