Contract Request Form (CRF) Electronic Signature SOP

**CRF E-Form Flow by Office:**

Project Manager (PM) will verify with the Fund Manager (FM) and the Fiscal office to ensure all funding codes are correct. PM will send the form to the Contracts Assistant II (CA) (Cathy) for CA# issuance/finalizing.

CA will ensure all areas are completed correctly and that all required attachments are complete.

CA will:

Initiate the e-signature process.

Create the routing sheet (RS) to be project specific making sure all approvers and signators are correct.

Create PDF of RS and CRF through the ESign system.

RS progression:

Sender - State Contracting (CA) (Cathy or Estelita)

(

Jimmy

Mindi

Signature – FM

Approver – Fiscal (Initials)

Teresa (all funds)

Robert (YCA)

David (HI-EMA)

Dennis (217,218)

Catherine (217,218)

Sharon (Bond)

Joanne (GMO & OVS)

Signature – Fiscal Officer

Signature – CEO

Approver – DAG secretary (log)

Approver – DAG

Approver – TAG secretary (log)

Signature – TAG

Complete – CA

All above will get an email copy of the completed/signed form automatically.

A hard copy will be sent to the PM by the CA.

**Common Questions:**

Q. How do I sign?

A. Follow the instructions on the screen.

There are three methods for signing the document. Note: all **require** you to type your full name in the “Enter your full name here” field

1. Type: If this is selected a signature will appear at the “Sign Here” field with a pre-selected style/font.
2. Draw: If you have a touch screen device, you will be able to Draw your name in the “Sign Here” field. This option will look closer to your actual signature
3. Image: When you select the “Click to choose image signature” field, a window will open that will prompt you to select the location of your “signature” file.

1. If you are using a military email address you will have to copy and paste the web address.

Q. Who has visibility of the CRF in the process?

A. The Sender has visibility of the CRF and all actions taken at any given time.

Q. How do I make comments?

A. Only the Signators can make comments on the Routing Sheet.

Q. How do I have all of the eSign messages go to one folder in Outlook? We strongly suggest that you do this.

A. While you are in Outlook 2013:

1. Create a New Folder called “ETS eSign”. Right-click “Inbox” -> New Folder”
2. Create a new Rule. Select “HOME” Tab in display bar -> Rules -> Manage Rules & Alerts
3. Select “New Rule” -> Apply rule on messages I recieve -> Next
4. Creating the Rule using the Rules Wizard
   1. Under Step1: Select condition(s), Place a checkmark next to “with specific words in the sender’s address”. Under Step2: Edit the rule description, select “specific words”
   2. Under Specify words or phrases to search for in the sender’s address type echosign and select ADD. Under the Search list “echosign” should appear. Select the OK button.
   3. Under Step 1: Select “move it to the specified folder”. Under Step 2 select “specified” folder.
   4. Select the ETS esign folder and select OK
   5. Select Next again. Note: Nothing is selected under “Are there any exceptions?”
   6. Type in a name for your rule. Select Finish to complete the new rule that you created.
   7. The new rule is now created. Select “Apply” then “OK”

Q: How do I prevent the eSign messages from going into the “Junk Email” folder in Outlook 2013?

1. Select Home -> Junk -> Junk E-mail Options
2. Select the Safe Senders Tab
   1. ADD “message@echosign.com”
   2. ADD “echosign @echosign.com”

Q: What if the person who needs to sign is out of the office or out sick?

A. The person who needs to sign can assign it to go to someone else if they know they will be out or the sender can also bypass that person.

Q: My signature and/or initial block isn’t centered.

A: The blocks may look un-centered as you fill it in but the signatures and/or initials will be in the correct spot when the form is completed.

Q: Why am I receiving a reminder to sign when I already signed the document?

A: Remember after prefilling the fields, to select the “Click to Send” button on the bottom of the screen. There should be a “Processing Document” message followed by a screen indicating the document has been successfully sent for signature. If you opened the document, signed and or filled in the required fields, and closed the browser, the document will not be processed.

Q: What if I choose to not sign the document?

A: In the upper left hand corner under the “ETS State of Hawai’i” logo, select Options -> I will not e-sign. Enter the reason for declining and select “Decline”.

**Rules:**

-No changes can be made to the form once it starts the e-signature process. If the form is declined it will automatically be sent back to the sender and all signatures and initials will be erased.

-Comments are allowed on the Routing Sheet by Signators only.

**Responsibility:**

The whole idea behind e-signing is to speed up the process. If everyone does their part in a timely manner the CRF process should take no more than 2-3 days from sending to completion. If the CRF is stuck at one step for more than a day you will be getting a phone call or an email reminder. For Approvers the email should not be in your inbox for more than a few hours. From April through October 2016 the average time to complete an e-sign CRF was 8.2 days.

Approvers - Responsibilities are to log, verify codes, inform signators that a CRF is awaiting their signature or for their information. Not all Approvers will have to initial the form.

Signators – Responsibilities are to sign the form approving the project.

**Definitions:**

Signature – E-signature

Approver – All Approvers will have an area to initial or to simply approve the form in the case of logging or for your info/comment. This title does not necessarily mean that you are “Approving” the form or action, it is a generic term.

Sender – The person who initiates the form for e-signatures.