How To Reassign a DocuSign Request to Another Individual for Signature

You've received an email from an individual at Zurich North America, via DocuSign. The subject line of the email includes the client company name, and advises you that there are documents for your signature.

Once you open the email, you are asked to Review and Sign the documents, using the provided link.





Actions/Steps	Screen
 Click Review Document link in blue box. The document 	NOTE: You are not required or committed to sign the document just because you checked the Agree box.
 will display in background as a PDF, with embedded signature links. 2. To enable any actions, you must check the Agree box to use the DocuSign electronic records and signature. 3. This enables you to Continue, and opens the document for full review. 	Image:
IF you determine you are not the person who should be signing these documents: 1. Select the Other	NOTE: Decline to Sign will conclude this request and disable any other actions! Print & Sign indicates you are opting to sign and return hardcopy, rather than electronically.
Actions, to the right of the Continue button. This is also	CONTINUE OTHER ACTIONS
available at the end of the document	FINISH LATER ASSIGN TO SOMEONE ELSE
after you've clicked Continue to enable document review. 2. Select the option to Assign to Someone	Save the document in its current state and finish the signing process at a later time. Should someone else be signing? Provide the new signer's email address and send the document to them for signature.
Else	DECLINE TO SIGN
	Notify the sender that you refuse to sign the document.

Process for Assigning the Signing of Documents to Another Individual



Actions/Steps Screen 1. Complete the Please Review & Act on These Documents DocuSign reassign screen Kim Assign to Someone Else withName and Email Address for the New Signer email of individual Please read the <u>Electronic Re</u> I fagree to use electronic Insured Signer's email who should be New Signer's Name Insured Signer's name signing, along with a Please provide a reason to Kim for changing signing responsibility brief reason for To Insured for signature **changing** the signing responsibility. 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. 2. Click the *Assign to* Someone Else ASSIGN TO SOMEONE ELSE CANCEL button to finish reassignment. 1. Click Close You will receive onscreen confirmation, SIGNING RESPONSIBILITY CHANGED and will automatically become a Carbon You have successfully changed signing responsibility. Copy recipient for You have been added as a Carbon Copy recipient. this DocuSign transaction. CLOSE You will immediately receive an email, similar Kim via DocuSign <dse@docusign.net> 8:17 AM (3 minutes ago) 📩 to me 💌 to the first one, which shows you were sent a Docu Sign copy. The Review Document link now opens a Read Only PDF, without signature flags or Other Action options Kim sent you a copy. REVIEW DOCUMENT Kim @zurichna.com Learn. Grow. Achieve.

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