How to Release and Return Equipment Using DocuSign

Scope

This process explains how to create, send and track the Asset Off-Campus Stewardship Form OSU Marion in DocuSign. This process aims to provide a process to ensure assets that are taken off-campus and/or are theft prone are appropriately recorded and released. This process also serves to ensure compliance of tracking non-capital assets with physical tagging and disposal in accordance with the University’s policies and procedures for surplus property.

Procedure: Issuance of Asset

1. Navigate to www.DocuSign.net
2. Log in with your OSU name.# and password
3. Select the red “New” button
4. Select “Send an Envelope”
5. Select “Use a Template”
6. Select “All Templates”
7. Search for “Asset Off Campus Stewardship Form OSU Marion”
8. Click the check box next to the form
9. Click “Add Selected” at the bottom
10. Enter the Name and Email of the individual who is signing out the equipment as the first recipient
11. Enter your Name and Email as the second recipient
12. You can not change recipients # 3-4
13. Select “Next”
14. Enter information into all fields in Sections I and II
15. Once you have verified all information is correct, select “send”
16. Once the Individual Signing Out equipment, Individual Releasing Equipment, Equipment Coordinator and the Senior Fiscal Officer sign off, the equipment may be released

Procedure: Return of Asset

1. Navigate to www.DocuSign.net
2. Log in with your OSU name.# and password
3. Click on “Completed”
4. Find and select the completed form used for the issuance of this asset
5. Click “More”
6. Click “Create a Copy”
7. Verify the recipient information is correct
8. Select “Next”
9. Verify the asset information is correct
10. Select “Send”