

Guide to Tracking and Managing DocuSign Envelopes

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Introduction

Monitoring the status of envelopes in DocuSign is essential for ensuring timely action and follow-up. DocuSign offers built-in tracking tools to help you:

- Confirm when documents have been received
- Check if signatures are still pending
- Verify when an envelope is complete

This guide explains how to:

- Keep track of documents you've sent for signing
- Find and organize documents using folders in DocuSign
- Check if documents have been received, signed, or are still in progress
- Make changes to the contents of envelopes you've already sent, depending on where it is in the signing process
- Cancel an envelope and send a new version if needed
- Share access to your DocuSign account with someone else (e.g., vacation coverage)

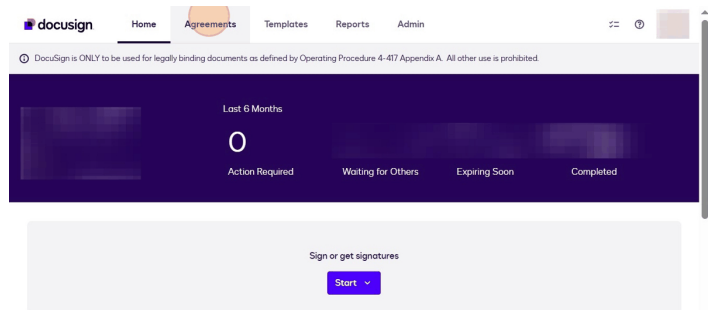
How To Access Envelopes/Documents

DocuSign organizes the envelopes and documents you send into folders to help you easily track and manage their progress.

Accessing Folders in DocuSign

To view your envelopes organized by folders (e.g., Inbox, Sent, Drafts), follow these steps:

1. Go to www.docusign.com and click Login (top right corner). Enter your Fleming credentials.
2. At the top of the screen, click "Agreements" in the main navigation bar. This opens your envelope management dashboard.

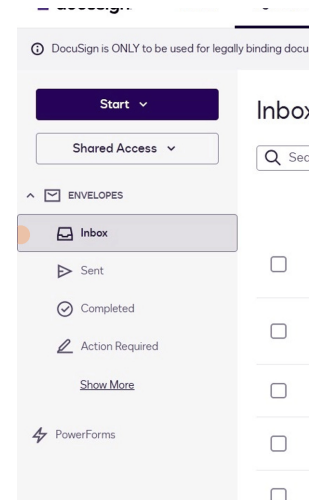


3. View Your Folders: On the left-hand side of the screen, you'll see the Folders panel. Common folders include:

- Inbox – Envelopes sent to you
- Sent – Envelopes you've sent
- Drafts – Envelopes you've started but not sent

You'll use the primary folders: **Sent**, **Completed**, and **Action Required**.

Tip: If you don't see a folder in the left-hand panel, click "**Show More**" or expand the menu to view all folder options.

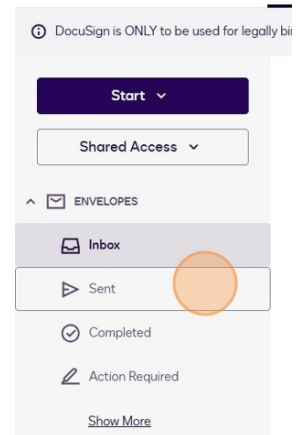


Sent Folder

Purpose: The Sent folder displays all envelopes you have sent out for signatures, including documents awaiting action from one or more recipients.

How to View:

1. From your DocuSign homepage, click “Agreements” on the main menu.
2. Click on the “Sent” option in the left-hand menu.
3. Browse the list to find the envelope you're tracking.
4. Click on the envelope to view recipient status and routing order details.

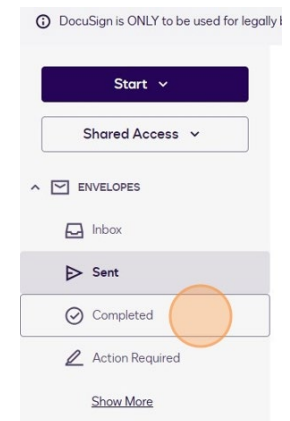


Completed Folder

Purpose: The Completed folder contains all envelopes fully signed by all recipients. These documents are finalized and can be downloaded, printed, or archived for your records.

How to View:

1. In the left-hand menu, select “Completed.”
2. You'll see a list of envelopes that have finished the signing process.
3. Click on any envelope to view or download the final signed document.

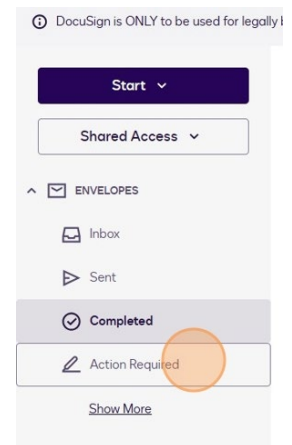


Action Required Folder

Purpose: The Action Required folder contains envelopes that require your attention. This may be because you need to sign a document or complete another action, such as reviewing, approving, or providing additional information.

How to View:

1. Click on “Action Required” in the left-hand navigation panel.
2. This will show documents awaiting your input.
3. Open the envelope and follow the prompts to complete the necessary action.



Understanding Envelope Statuses and Cancellation Rules

After you have sent it, envelopes can have several different statuses, including:

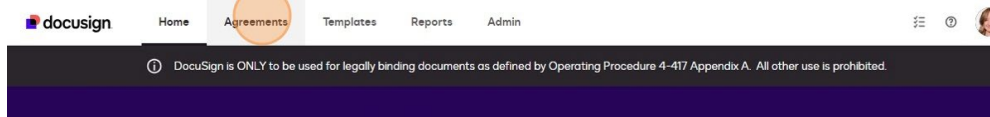
- **Sent** – The envelope has been sent but not yet viewed.
- **Waiting for Others** – The envelope has been sent and is waiting for recipients to sign.
- **Delivered** – The recipient has opened the envelope but has not yet completed it.

- **Completed** – All required actions (e.g., signatures) have been completed.
- **Declined** – A recipient has refused to sign.
- **Voided** – The envelope was cancelled before completion because it was:
 - *Expired* (the signing deadline had passed before all recipients completed their actions) or needs updates. The envelope expires once a deadline has passed, and recipients can no longer sign.
 - *Cancelled*: You can cancel (void) an envelope if it is still in progress; it must be in the Sent or Delivered status. Once the envelope is completed, it cannot be cancelled. While you can't resend a voided envelope directly, this guide shows you how to quickly recreate and send it without starting from scratch.

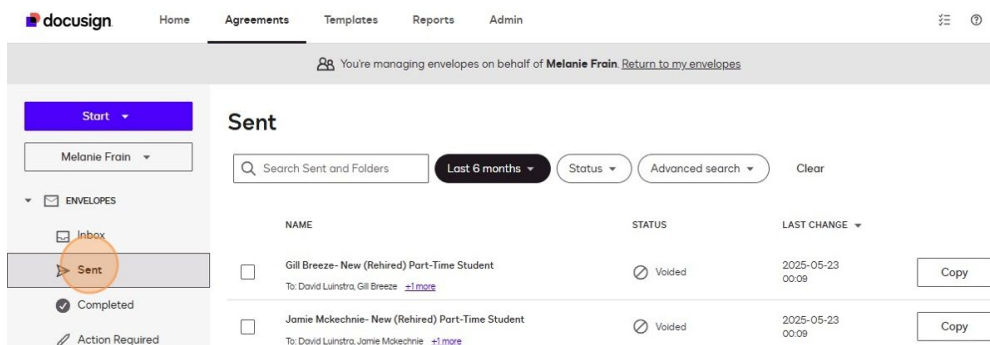
How to Check the Status of Your Envelope

You can log into DocuSign at any time to check the status of the signing process.

1. Go to www.docusign.com and click Login (top right corner). Enter your credentials.
2. From the landing page, click "Agreements" from the top menu.



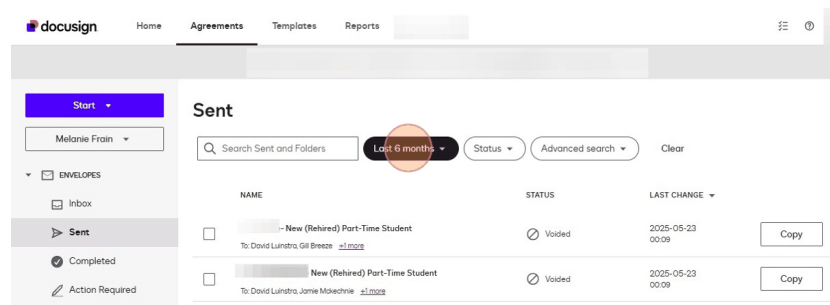
3. Click the "Sent" folder in the left-hand menu. This folder contains all envelopes you have sent that are still in progress.



4. Locate the Envelope:

Browse the list or use the search bar to find the envelope you want to check.

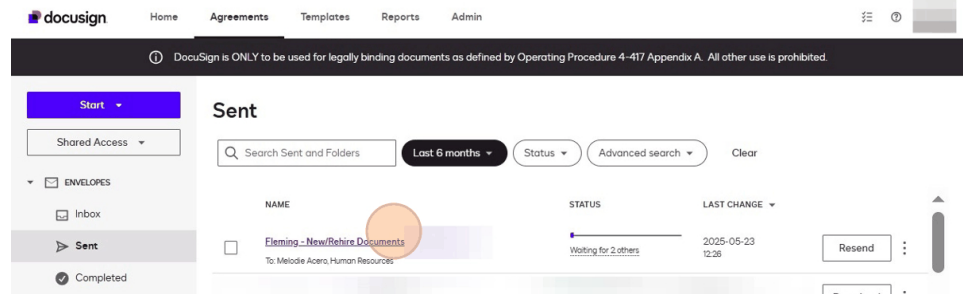
You can search by recipient name, subject line, or envelope ID if you know it.



Note: The system automatically defaults to filtering to the "Last 6 months". If you want to view farther back, click this dropdown menu and you can select a different time frame.

5. View Envelope

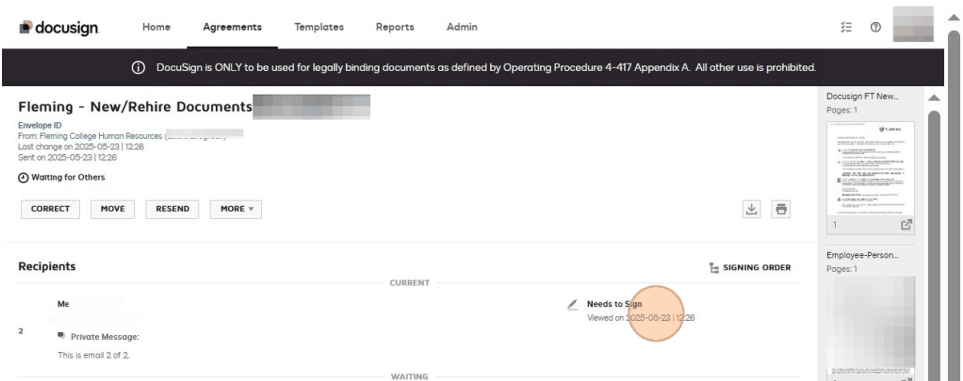
Details: Click on the envelope name or subject line to open it.



6. Check the Status

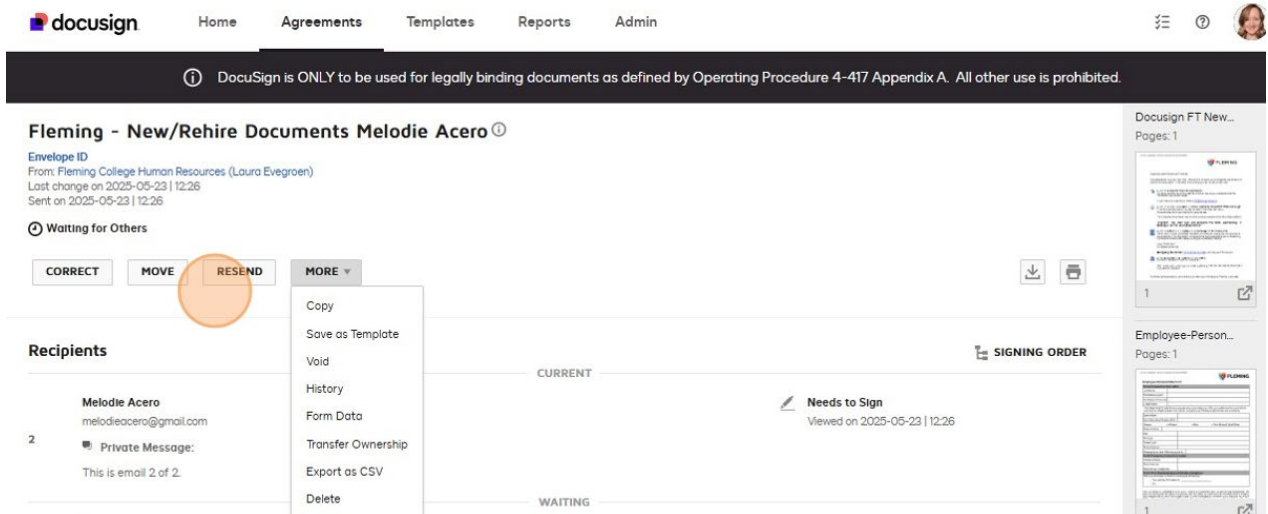
In the envelope details view, you'll see each recipient's status (e.g., "Waiting for Signature," "Viewed," "Signed").

If the envelope is still in progress, you'll see which recipients have completed their actions and who is next in line.



7. Take Additional Actions (if needed). From this view, you can also:

- **Send a reminder** to recipients who haven't signed yet.
- **Correct** recipient details if an error was made.
- **Cancel or void** the envelope if necessary.



Signing Deadlines in DocuSign

All DocuSign envelopes have an expiration setting. After the envelope is sent, it will be voided if all parties do not complete it before it expires. If an envelope you sent will soon expire, you can extend its expiration date to give your recipients more time.

Once a deadline has passed, the envelope is considered Expired, and recipients can no longer sign.

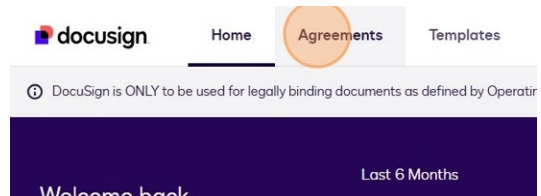
You cannot adjust the deadline after the envelope expires—you'll need to create and send a new one.

To Extend the Expiration for an Envelope

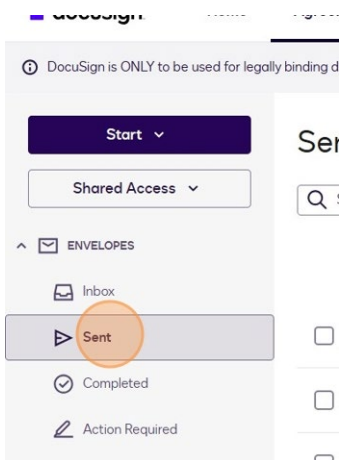
If you need to change the signing deadline after the document has been sent:

1. Go to www.docusign.com and click Login (top right corner). Enter your credentials.

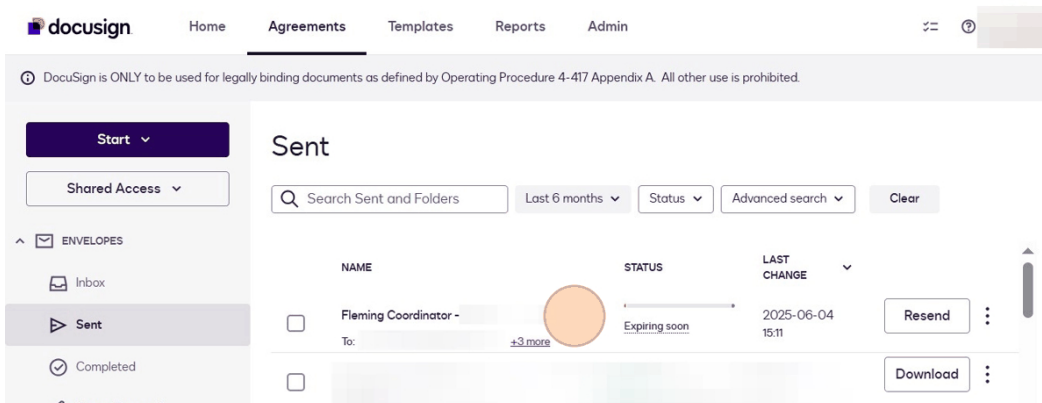
2. After logging in, you'll land on the DocuSign Home page. Click Agreements in the top navigation menu.



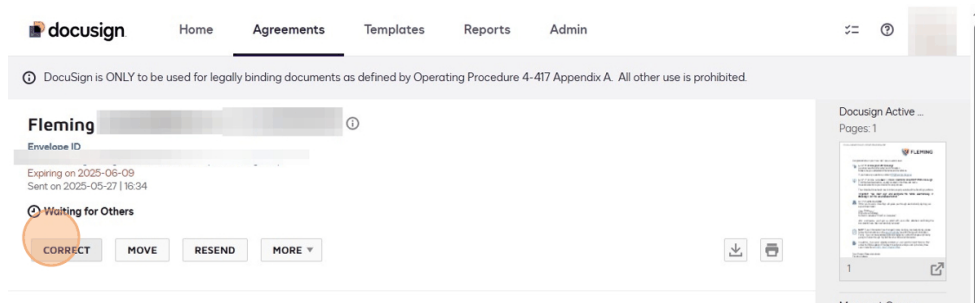
3. Click Sent on the left-hand menu.



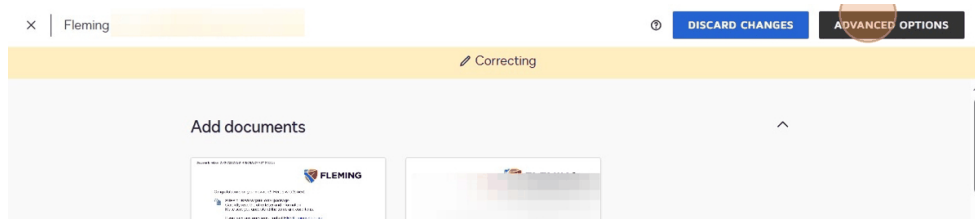
4. Find the envelope you want to update (it must still be in progress) and click to open it.



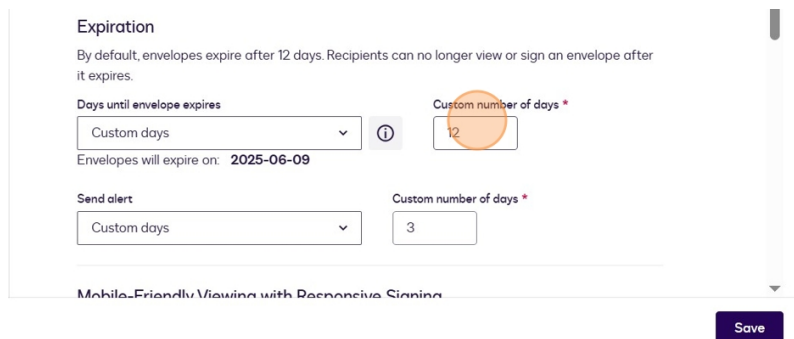
- Click Correct to open the editing screen.



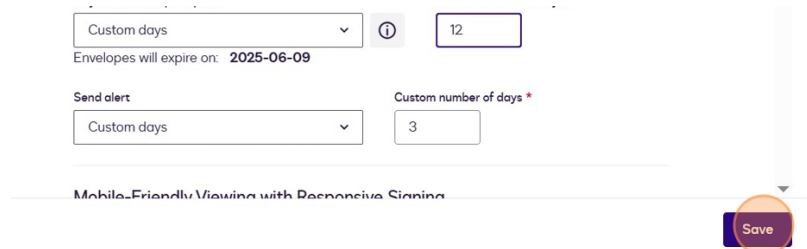
- Click "Advanced Options" on the upper right-hand side of the screen.



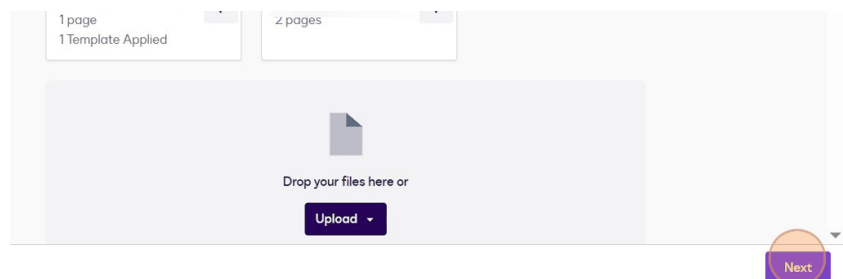
- Scroll down to the "Expiration" section. Click the "Custom number of days*" field.



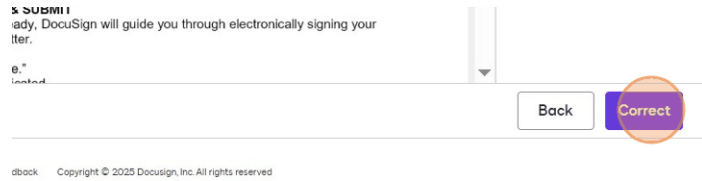
- Click Save



- Click "Next" at the bottom of the screen.



10. Click "Correct."



What Happens Next

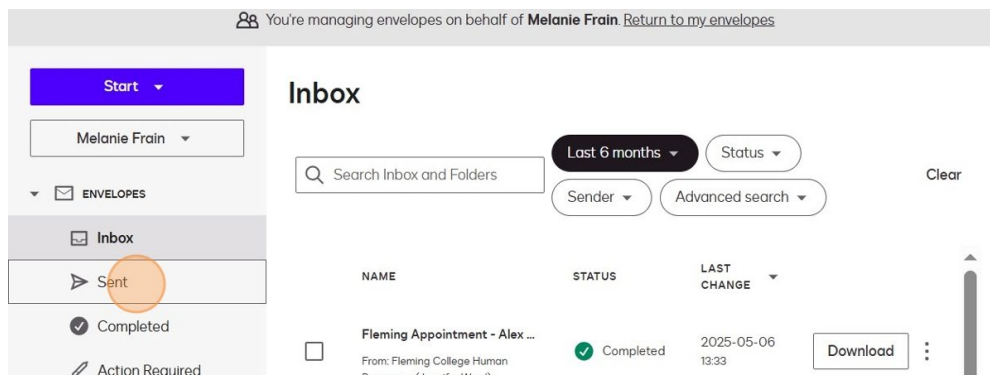
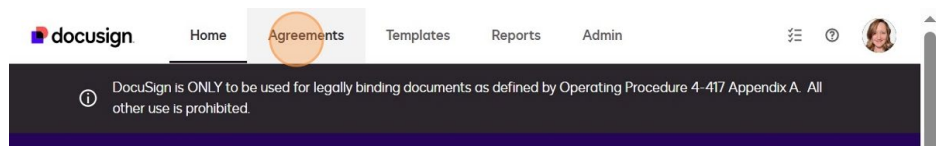
Once you've extended the expiration date for the envelope:

- Recipients can access and complete the envelope until the new expiration date.
- DocuSign will send reminders (if enabled) based on the updated expiration timeline.
- You can monitor the envelope status in your DocuSign dashboard to track whether it has been opened, signed, or completed.
- If no action is taken by the new expiration date, the envelope will expire, and no further signing actions can be completed.

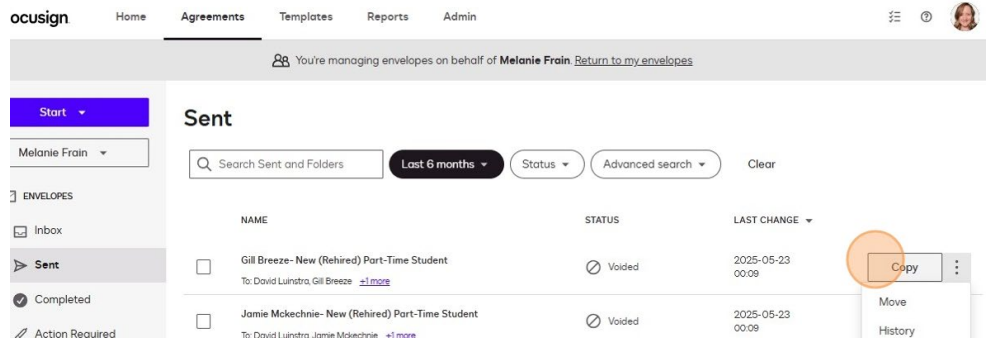
How to Resend a Voided Envelope

Sometimes an envelope is voided because it expired (the signing deadline has passed before all recipients complete their actions). While you can't resend a voided envelope directly, you can recreate and send it without starting from scratch.

1. Go to www.docusign.com and click Login (top right corner). Enter your credentials.
2. Navigate to the "Sent" Folder: From the DocuSign homepage or dashboard, click "Agreements" from the top menu.
3. Click "Sent"



- Beside the envelope you want to reissue, click "Copy"



- Everything in the envelope will be ready; you don't have to read the info or use the bulk sign. Scroll to the bottom of the page and click "Send Now".



Making Corrections to a Send Document

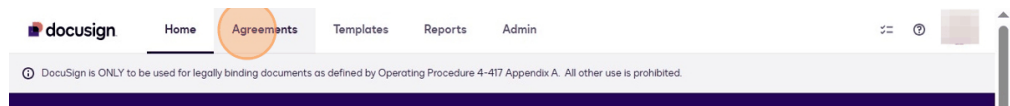
Note: Once the first-person signs, you cannot use the Correct option (see "If Recipients Have Already Signed").

If No One Has Signed Yet

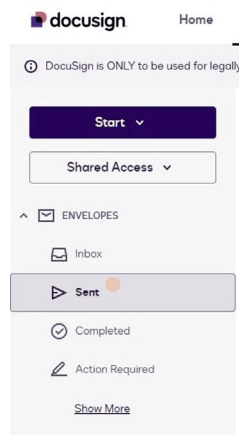
If no recipients have signed the envelope, you can easily make changes using DocuSign's "Correct" feature without starting over.

How to Make Revisions:

- Go to www.docusign.com and click Login (top right corner). Enter your credentials.
- Go to "Agreements" from the top navigation menu



- Click "Sent" on the left-hand menu.



4. Click the drop-down arrow next to the "resend" button. Click "Correct."

STATUS	LAST CHANGE	
Expiring soon	2025-06-05 13:53	Resend
Expiring soon	2025-06-05 13:47	Resend
Completed	2025-06-05 11:02	Move Correct Copy Save as Template Void History Form Data Transfer Ownership Export as CSV Delete
Completed	2025-06-04 18:04	
Completed	2025-06-04 15:00	
Completed	2025-06-04 11:47	
Completed	2025-06-04 00:19	
	2025-06-03	Download

4. Make your changes:

- Update documents (add, remove, or replace files).
- Edit recipients (change names, emails, or routing order).
- Adjust fields (move or add signature/initial boxes).

Fleming Coordinator -

DISCARD CHANGES ADVANCED OPTIONS

Correcting

Add documents

Drop your files here or Upload

Add recipients

Some of the recipients are locked and cannot be changed [Learn More](#)

☒ Set signing order [View](#)

Hiring Manager

Name *

Needs to Sign Customize

Next

5. Click Next to review the envelope.

Fleming Coordinator - Margaret Camp

DISCARD CHANGES ADVANCED OPTIONS

Correcting

4

Email *

5

Name *

CC Receives a Copy Customize

Email *

Add Recipient Add Delay

Add message

Subject *

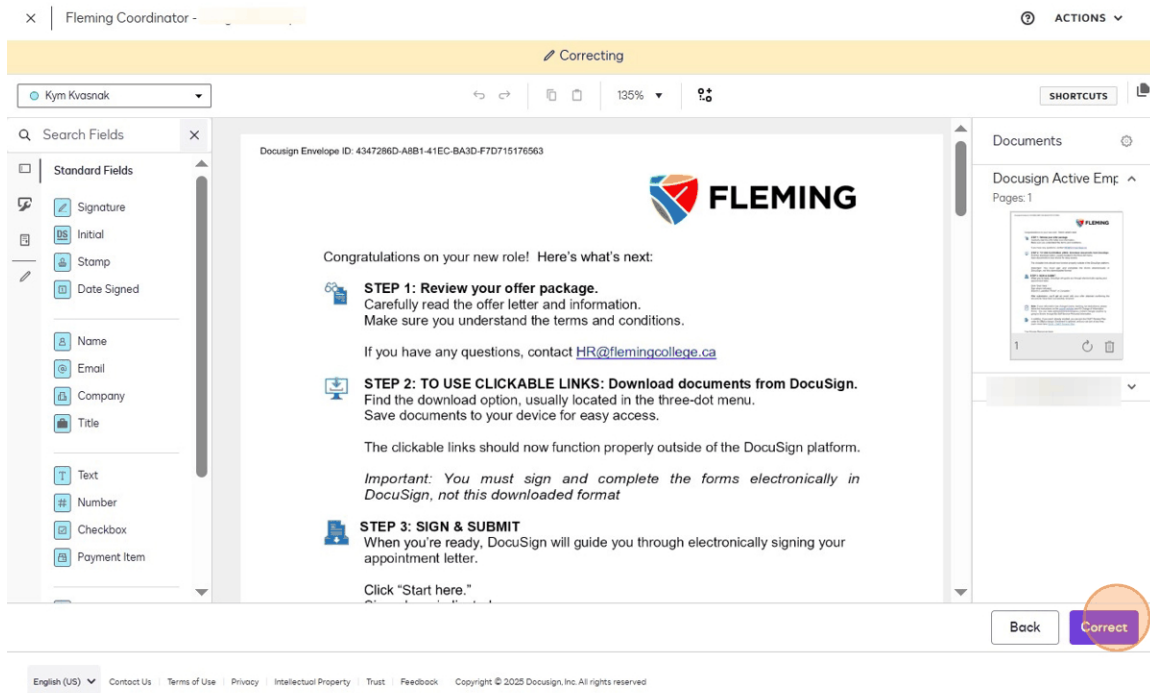
Fleming Coordinator -

35/100

Message

Next

6. When ready, click "Correct" to resend the updated envelope.



If Recipients Have Already Signed

After someone has signed, the envelope is locked, and changes require creating and sending a new envelope. You will need to follow these steps:

1. Void the Current Envelope (*See Cancelling (Voiding) an Envelope*)
2. Make Necessary Edits – you have 2 options
 - a. Sending a Revised Envelope from the cancelled one (*see Copying and Sending a New Envelope from a Cancelled/Voided One*)
 - b. Create a New Envelope - Start a new envelope in DocuSign and upload the revised document.

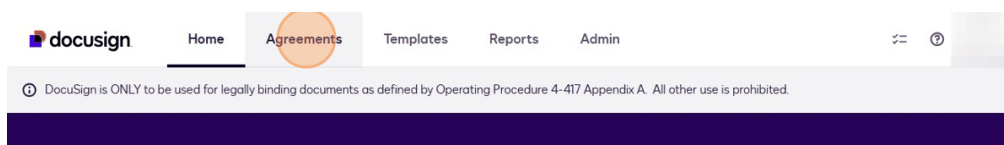
Cancelling (Voiding) an Envelope

Cancelling an envelope may be necessary if:

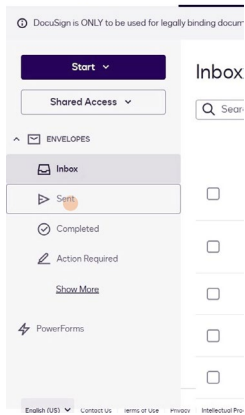
- There is an error in the document, and a recipient has already signed it
- A recipient needs to be changed
- The document no longer needs to be signed

How to Cancel (Void) an Envelope:

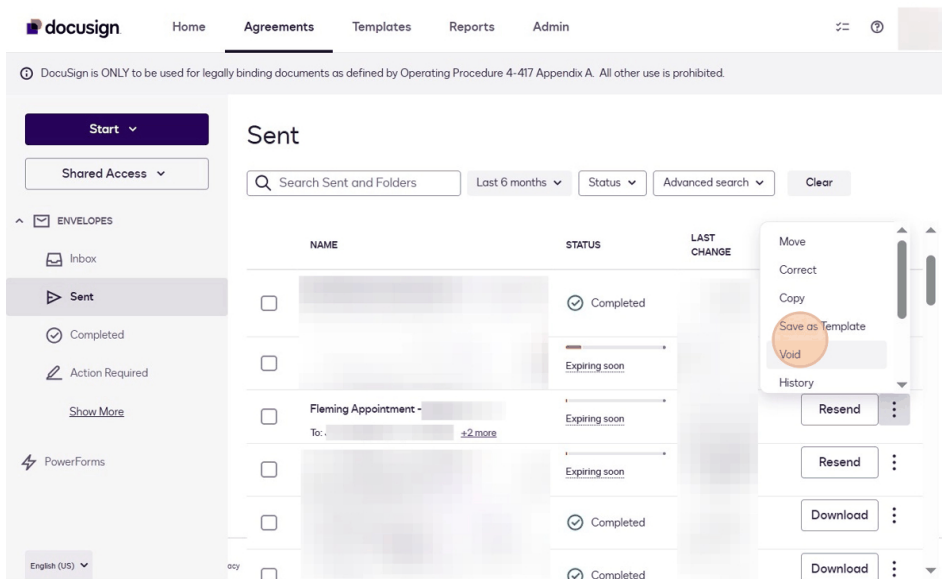
1. From the main landing page, click "Agreements"



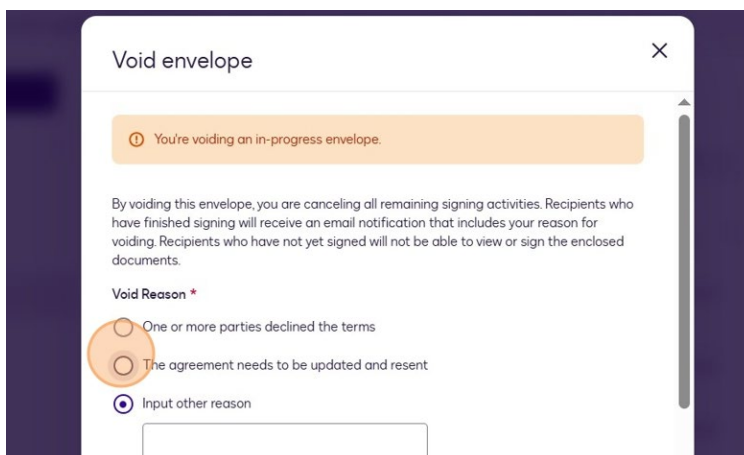
- In the left-hand menu, select the "Sent" tab.



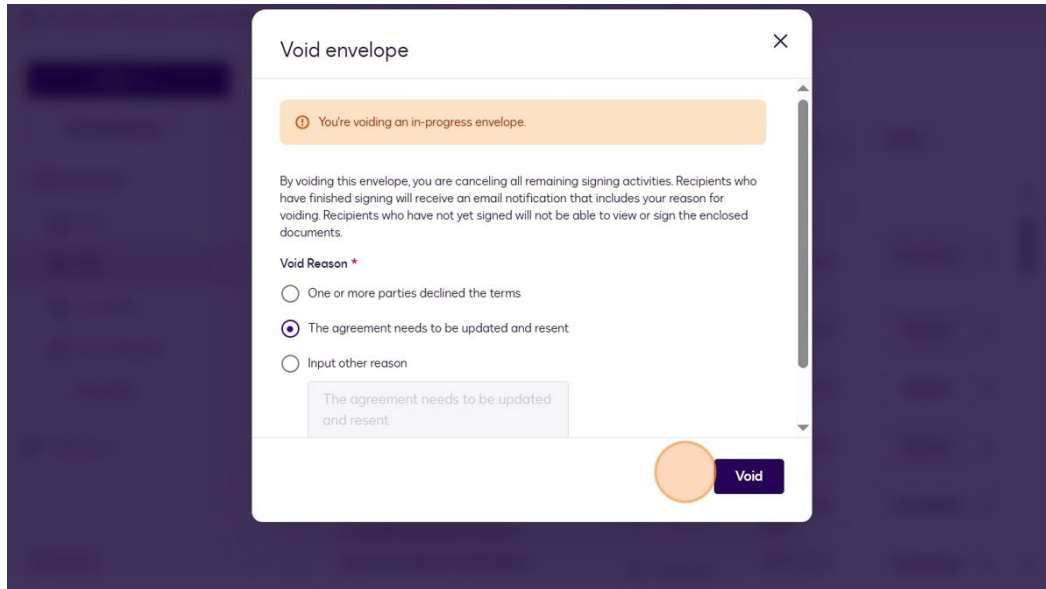
- Locate the envelope and click these dots to open a options menu. Click "Void"



- Click the void reason "The agreement needs to be updated or resent".



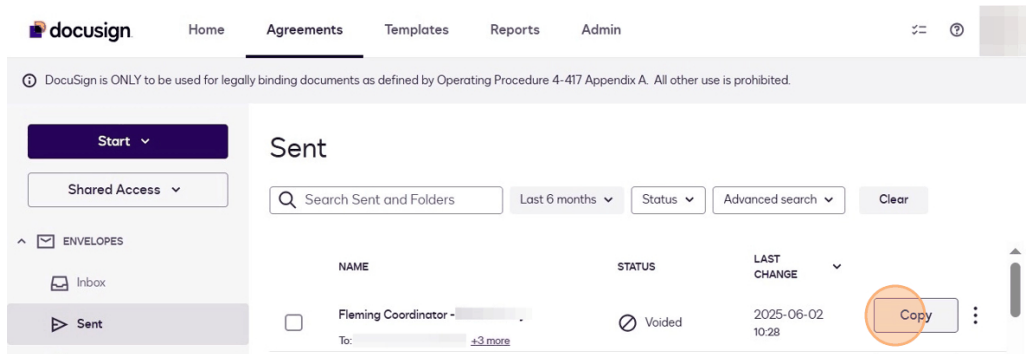
5. Click "Void"



Copying and Sending a New Envelope from a Cancelled/Voided One

Using "Create a Copy" saves time by reusing the original setup.

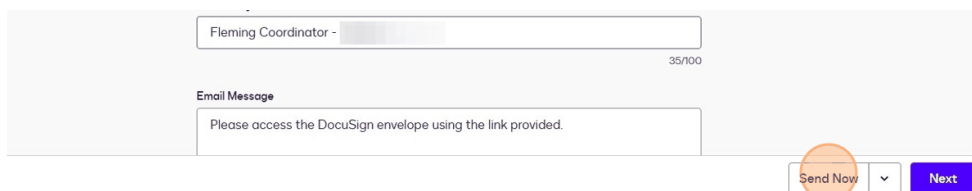
1. Back on the Sent Screen, find the voided envelope. Click "Copy".



On the Upload page:

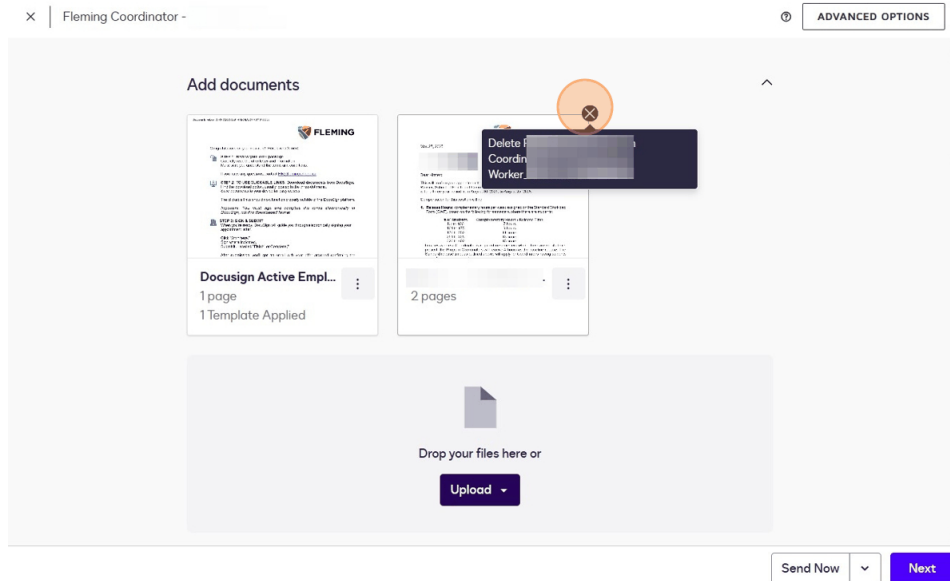
Using the Same Document (Without Changes)

1. Make any required changes to recipients and message details.
2. Click "Send" directly on the upload page to resend the envelope with the original field placements.
3. Once you have made any revisions, click "Send."

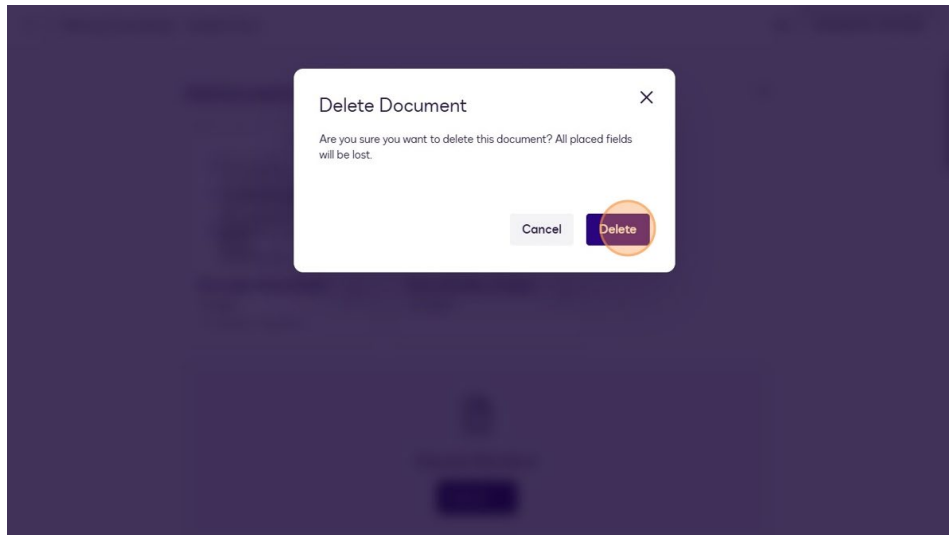


Upload a Revised Document Version

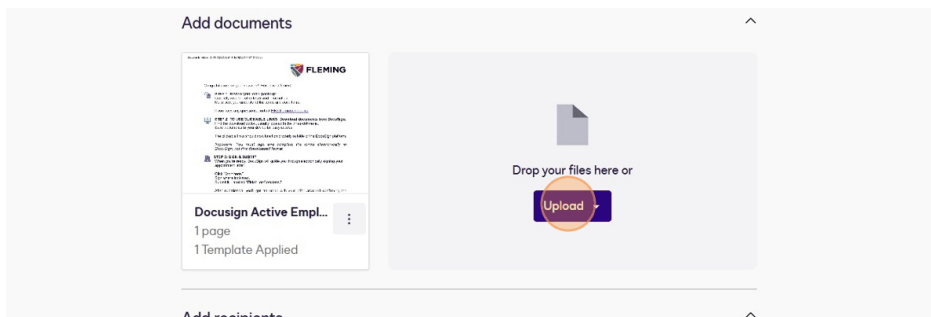
1. Remove the original document (if needed) and upload the revised version.



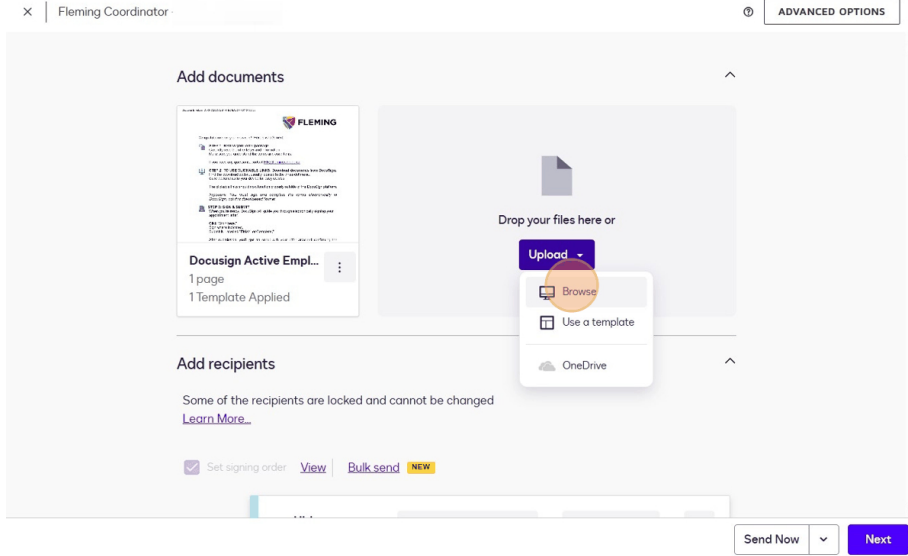
2. Click "Delete"



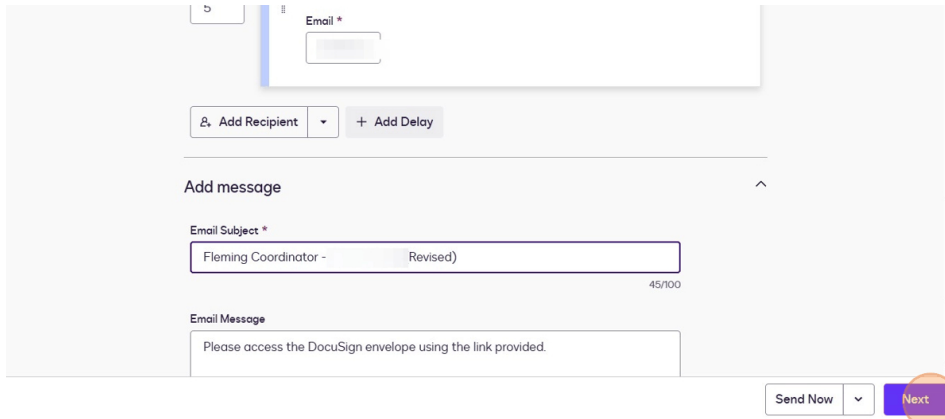
3. Click "Upload"



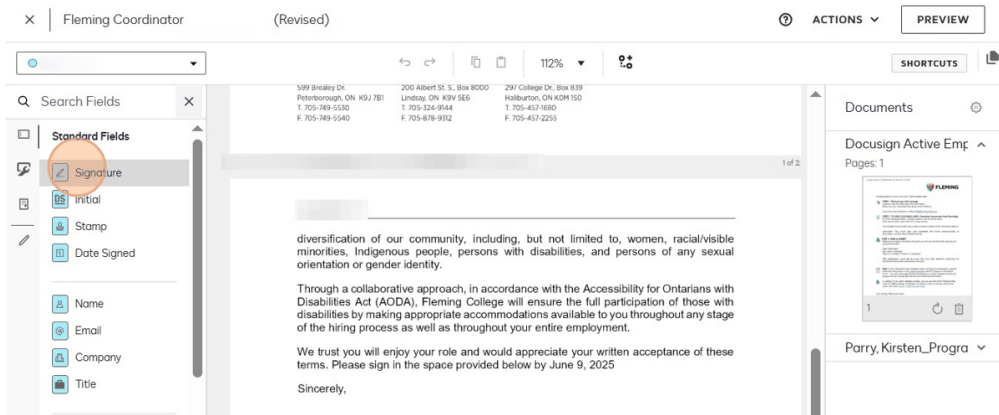
- Click "Browse" and locate the new version of your document.



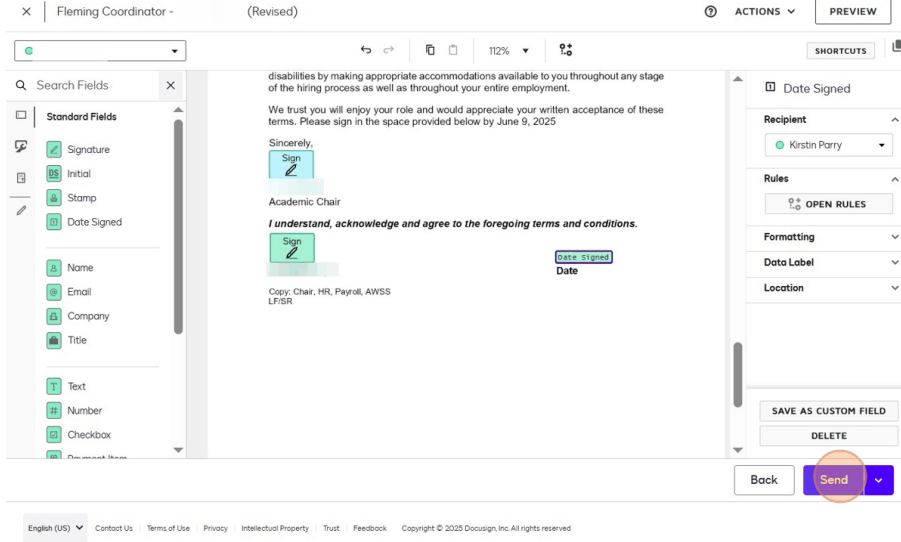
- After uploading a revised document, you must manually re-add all required fields (e.g., signatures, initials, dates, and text boxes) to the revised version. Click "Next."



- Add standard fields to your updated document, as you would when sending other envelopes (e.g., signature and date fields).



7. Click "Send."



Preparing for Time Off: Managing DocuSign Access with Shared Status or Delegate

When managing coverage in DocuSign, you have two main options: **Setting a Shared Status** or **Assigning a Delegate**.

- **Shared Status (For Users Sending Envelopes/Documents):** allows others to *view and take action on envelopes* within your account, making it ideal for broader coverage (e.g., vacations or leaves).
- **Assigning a Delegate (For Leaders Signing Offers):** routes *documents sent to you directly* to another person for action—best for short-term or specific delegation needs.

Setting Up Shared Status (For Envelope/Document Senders)

The **Shared Status** feature in DocuSign allows designated users to view and manage each other's envelopes during a defined **coverage period**, such as when a team member is on vacation, extended leave, or temporarily unavailable. This ensures continuity in document workflows, allowing another team member to monitor, send reminders, or take necessary action on envelopes during the absence.

Note: To share access, your colleague must have an active Fleming DocuSign account. They can create an account by following IT's instructions, which are [located here](#).

How to Set Up Shared Access

1. Navigate to <https://account.docusign.com/#/username>, enter your credentials and click "Next".

Log in to Docusign

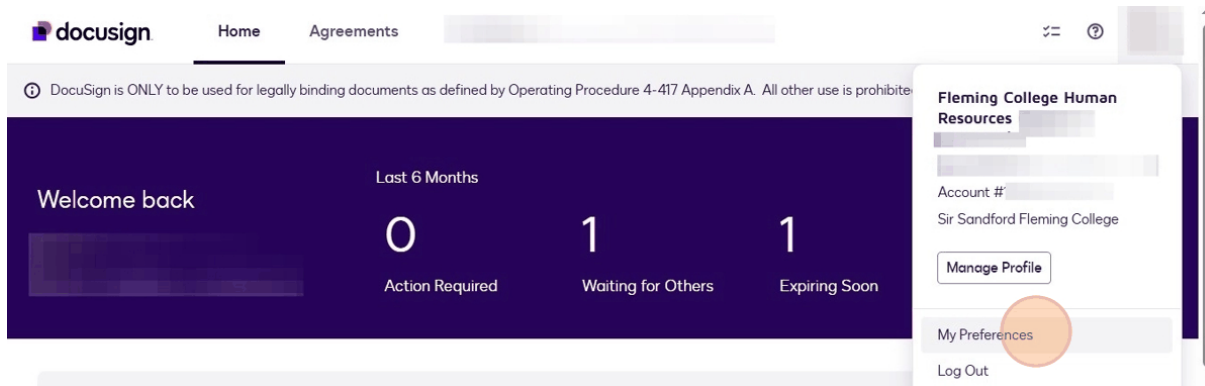
Enter your email to log in.

Email *

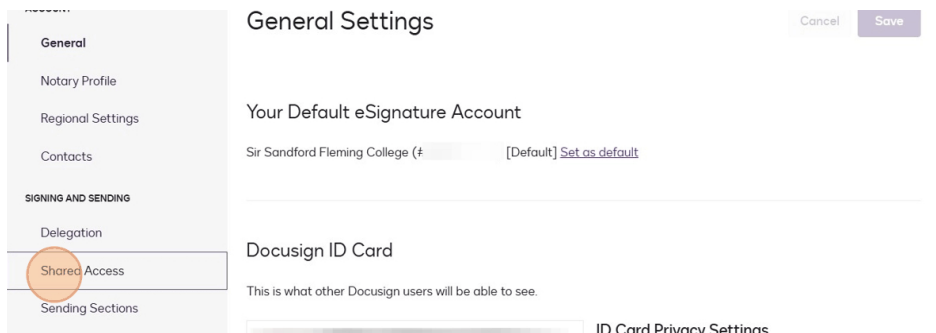
NEXT

Sign Up for Free

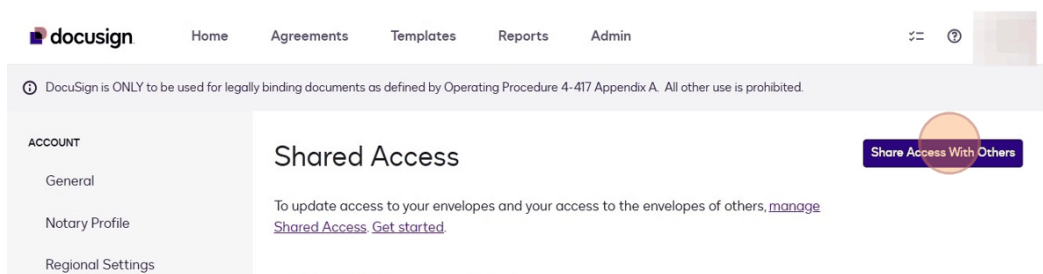
- From the main landing page, access the Preferences Menu. On the top navigation bar, click your profile icon or initials. Select Preferences from the dropdown menu.



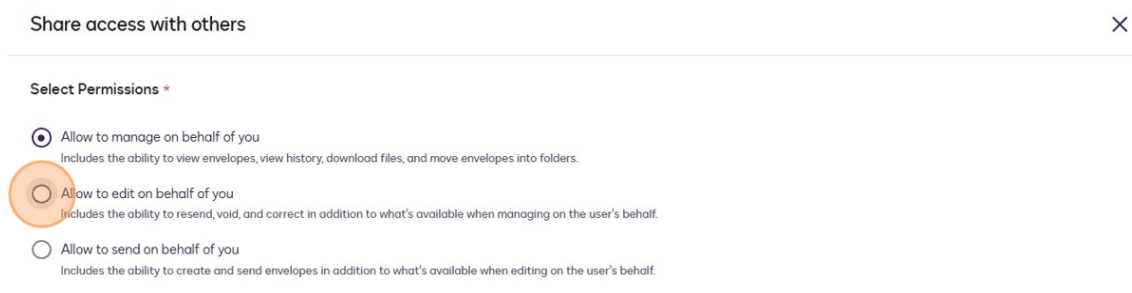
- Navigate to Shared Access Settings. Click "Sharing" or "Shared Access" in the left-hand panel.



- Click "Share Access with Others"



- Choose the level of access you want to give (typically, allow to edit on behalf of). Use this setting if you will have envelopes in process when you leave and want to allow your colleague to view them and make changes if needed while you are away.



- Set the start and end date for the coverage period. This ensures access is only granted during the specified timeframe.

☐ Allow to send on behalf of you
Includes the ability to create and send envelopes in addition to what's available when editing on the user's behalf.

Start Date * End Date

(YYYY/MM/DD) (YYYY/MM/DD)

- Select user. In the dialogue box, enter the name of the user who will have shared access to your envelopes. *Reminder: If their name does not appear, they do not have an active Fleming DocuSign account. Contact them and ask them to create one, using the above link.*

Select Users *

Available Users Selected (0)

Search by Search

☐ Name Email Shared Envelopes Access ⓘ

- Click on their account name. Click "Add"

Available Users Selected (1)

Search by

☒ Name Email Shared Envelopes Access ⓘ

☒

- Confirm the setup. Review the access details to ensure everything is accurate.

COUNT

General

Notary Profile

Regional Settings

Contacts

SHARING AND SENDING

Delegation

Shared Access

Sending Sections

Custom Fields

Template Matching

Notifications

Shared Access

Share Access With Others

To update access to your envelopes and your access to the envelopes of others, [manage Shared Access](#). [Get started](#).

Shared With Others Shared With Me

NAME	EMAIL	STATUS	START DATE	END DATE	PERMISSIONS
Ward)		Scheduled	2025-06-01	2025-06-13	Edit Remove

✓ You are sharing access with

Optional: Notify the Delegate

Let the person know they now have shared access to check the “Shared with Me” section in their DocuSign account during the coverage period.

What Happens Next?

- During the set coverage period, the selected delegate can monitor envelope statuses, send reminders, and take limited actions based on the permissions granted.
- After the end date, access automatically expires, and your account returns to private status.

Assigning Another Leader as Delegate to Sign on Your Behalf

Delegation allows you to assign a delegate (e.g. your direct supervisor) to your account at a time.

- **Only assign another leader (e.g., your supervisor or another people leader).**
 - *HR cannot accept appointment letters signed by non-leaders (e.g., support staff or faculty).*
- The delegate must have an active Fleming DocuSign account. They can create one by following IT's instructions, which are [located here](#).
- While active, the delegate will receive, access, and complete envelopes on your behalf.
 - Once removed (access expires), they can still complete any previously received envelopes, but won't receive new ones.

IMPORTANT: Delegates must be another leader covering while you are off.

Steps to Assign a Delegate

1. Navigate to [DocuSign](#) and enter your Fleming credentials

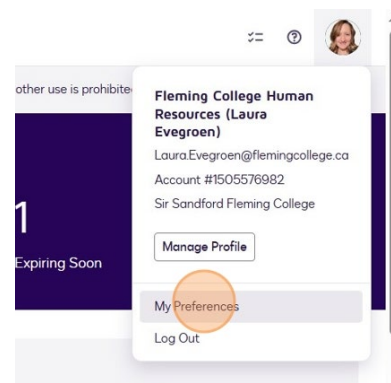
Log in to Docusign

Enter your email to log in.

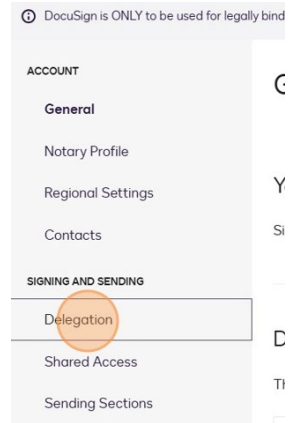
Email *

NEXT

2. Select your **profile image** and **My Preferences**.



3. Select Delegation from the menu on the left side of the screen under the “Signing and Sending” section.



3. Select **Add Delegate** and complete the following:
 - a. Select a user from the list of users on your account.
 - b. Select a start date. Delegation activates at midnight on the start date, based on your account's time zone.
 - c. Select an end date

Delegation

Delegate someone to sign on your behalf. You can have 1 active or scheduled delegate at a time. [Learn More](#).

My Delegates		Delegated to Me	
NAME	START DATE ▲	END DATE	STATUS

My Delegates

Speed up agreement completion times with delegated signing.

[Add Delegate](#)



4. Review the delegate status information:

Active. The delegation is in effect. The start date has passed; if there is an end date, it is in the future.

Scheduled. The start date is in the future; the delegation is not yet in effect.

Delegation

Delegate someone to sign on your behalf. You can have 1 active or scheduled delegate at a time. [Learn More](#).

My Delegates		Delegated to Me	
NAME	START DATE ▲	END DATE	STATUS
Amy Adams Amy.Adams@summitdemo.org	7/24/2024	7/26/2024	● Scheduled



What Happens Next?

Notifications with details of the delegation assignment are sent to you and the delegate. Once the delegate is active, they receive all new envelopes sent to you to sign. As needed, they can complete them on your behalf.