

How to Send Part-Time Student Appointment Letters Using DocuSign

This guide will show you how to create and send part-time student appointment (offer) letters through DocuSign, individually or in bulk, using the Bulk Send feature.

This process is for part-time students and does not apply to Full-Time Summer Students (App G). [Click here](#) for the process for requesting an App G appointment letter.

Prerequisites

- A Fleming DocuSign account. [Click here for information on getting started.](#)
- Student names and email addresses prepared.

Prepare Your CSV File for Bulk Send

Before sending appointment letters through DocuSign, you'll need to prepare a **CSV file**. This file acts as a contact list that tells DocuSign who the letters should go to and fills in key details (such as each student's name, email address, and position information).

You can send appointment letters to **one or more students** at a time—you'll add a separate row for each student.

When you are ready to send the letters in DocuSign, you will select a **template** that matches the student's employment status. There are different templates for:

- **New or rehired student employees** (first time working at Fleming, or returning after a 6+ month break), and
- **Returning or current student employees** (have worked at Fleming within the past six months).

Example of a CSV file

Each row represents one student who will receive an appointment letter.

First Name	Last Name	Email Address	Position Title	Start Date	End Date
Sarah	Patel	sarah.patel@flemingcollege.ca	Library Assistant	May 1, 2025	Aug 31, 2025
Jordan	Nguyen	jordan.nguyen@flemingcollege.ca	Research Assistant	May 1, 2025	Aug 31, 2025

IMPORTANT: You may need two CSV files.

For example, it's the start of the Fall 2025 semester:

- **Student A** is a **new hire** (never worked at Fleming), and **Student B** **worked** as a student in the **fall 2024 semester** (over 6+ months ago).
 - Include both in **File 1** (for *new or rehired student employees*).
- **Student C** is **currently active**.
 - Include in **File 2** (for *returning/current student employees*).

Each file corresponds to a different **DocuSign template** (or “envelope type”), so they must be uploaded separately. This ensures each student receives the correct appointment letter.

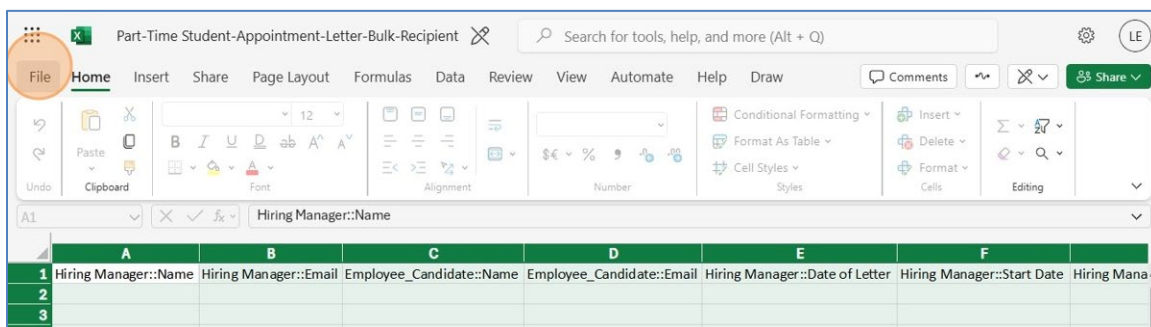
File naming tip- Use clear, consistent names when saving your files, such as:

- New_Rehired Student_Offers.csv
- Current_Returning_Student_Offers.csv

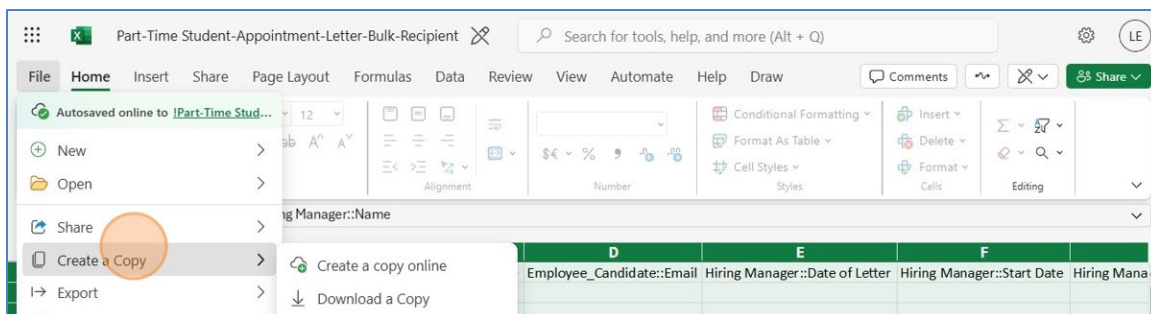
This makes it easier to locate and upload the correct file in DocuSign.

Procedure

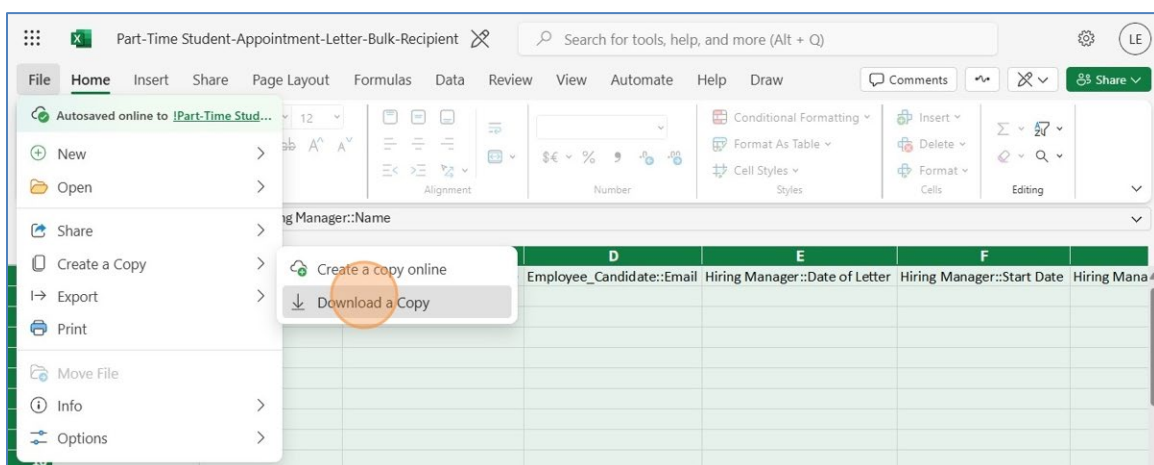
- 1) Download the Bulk Upload Template CSV file. [Click here](#)
- 2) Save a copy to your computer. Click "File"



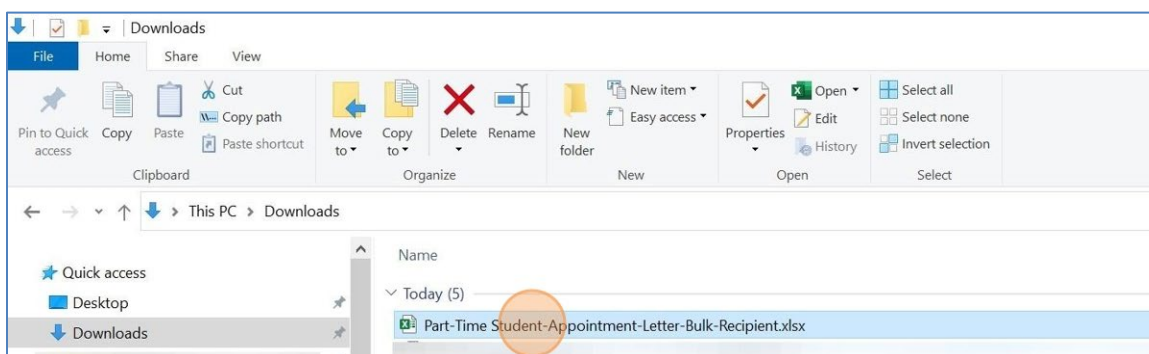
- 3) Click "Create a Copy"



4) Click "Download a Copy"



5) Open the downloaded file in Excel or Google Sheets.



6) Enter recipient details carefully. Reminder: Each row = one student letter

	A	B	C	D
1	Hiring Manager::Name	Hiring Manager::Email	Hiring Manager::Job Title	Employee_Candidate::Name

Tips:

- Press Ctrl + A, then double-click between column headers to auto-size columns.
- **Do not** change column headers
- **Avoid** special characters like () : ; < > @

IMPORTANT: All columns must have text. Blank values will cause errors during the DocuSign Bulk Send process.

CSV Columns Explained (Sample responses)

- **Hiring Manager::Name** - *John Smith*
- **Hiring Manager::Email**- *john.smith@flemingcollege.ca*
- **Hiring Manager::Job Title**- *Operations Manager, Research*
- **Employee_Candidate::Name** - *Student's full name*
- **Hiring Manager::Date of Letter** - *January 2, 2025*
- **Hiring Manager::Start Date** - *January 4, 2025*
- **Hiring Manager::End Date** - *April 18, 2025*
- **Hiring Manager::Position** - *Fish and Wildlife Lab Assistant*
- **Hiring Manager::Department**- *School of Environmental and Natural Resource Sciences*
- **Hiring Manager::Campus Location** - *Peterborough (Sutherland) Campus*
OR Lindsay (Frost) Campus OR Haliburton Campus

Important Note: If the employee is working at a location other than those above, type the specific location name and physical address.

- **Hiring Manager::Hours Per Week** - *up to 12 OR 12 etc.*
- **Hiring Manager::Initial Anticipated Hours of Work** – *Monday to Friday, 8:30 a.m. to 4:30 p.m. OR Monday to Friday, 8:30 a.m. to 8:30 p.m.*

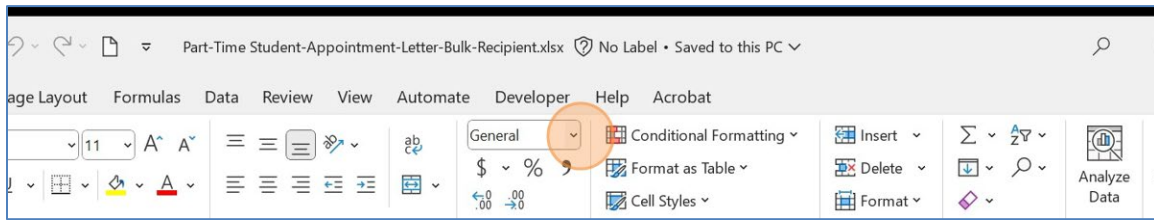
Important note: These are the anticipated hours of work, based on the standard hours for this student position. Any further details about the student's availability and schedule can be discussed during orientation.

- **Hiring Manager::Dept # for Payroll**- **five digit # (no spaces)**
- **Hiring Manager::FWSP Funded** – **Yes OR No OR PENDING**
- **Hiring Manager::ISEP Funded**- **Yes OR No OR PENDING**
- **Hiring Manager::Additional Information** – *e.g. Except Reading Week OR N/A*

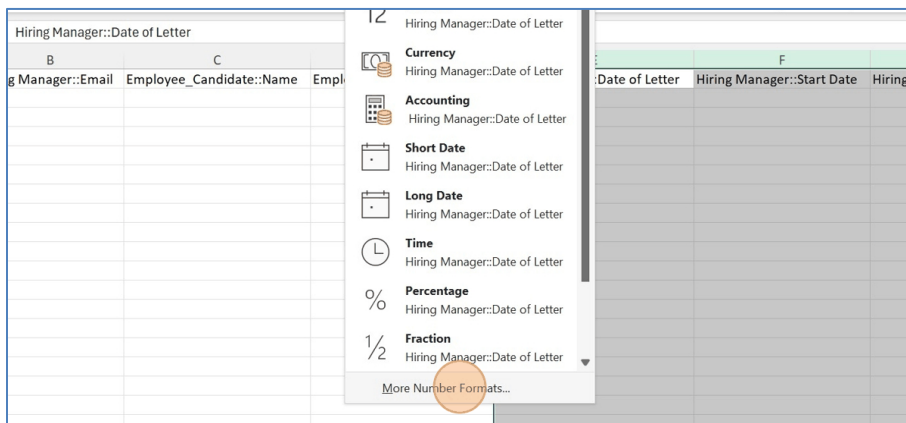
- 7) Format columns F, G and H (dates) using the format "March 14, 2012".
Highlight columns F, G and H.

Undo		Clipboard		Font		Alignment		Number		Styles		Cells	
F1				Hiring Manager::Date of Letter									
	B	C	D	E	F	G	H						
1	Manager::Email	Hiring Manager::Job Title	Employee_Candidate::Name	Employee_Candidate::Email	Hiring Manager::Date of Letter	Hiring Manager::Start Date	Hiring Manager::End Date						
2													

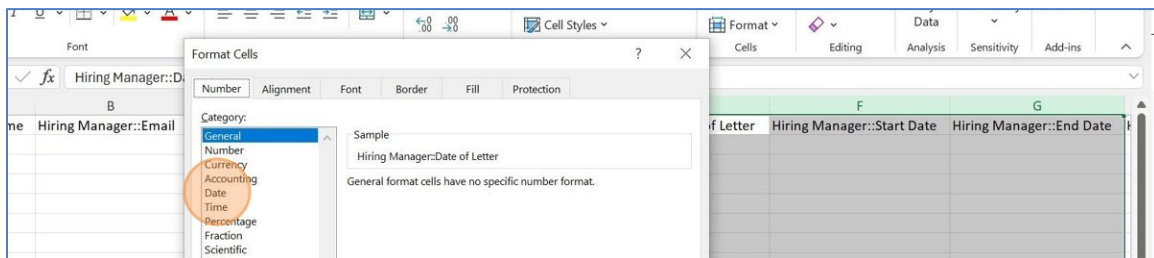
8) Click the down arrow beside "General" in the number section.



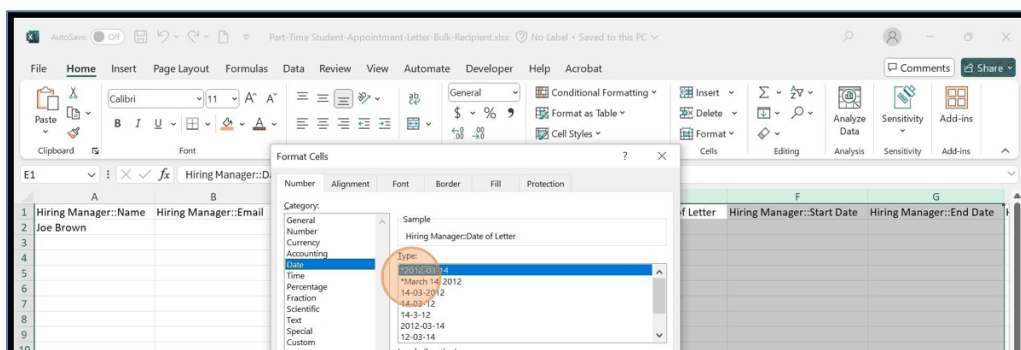
9) Click "More Number Formats..."



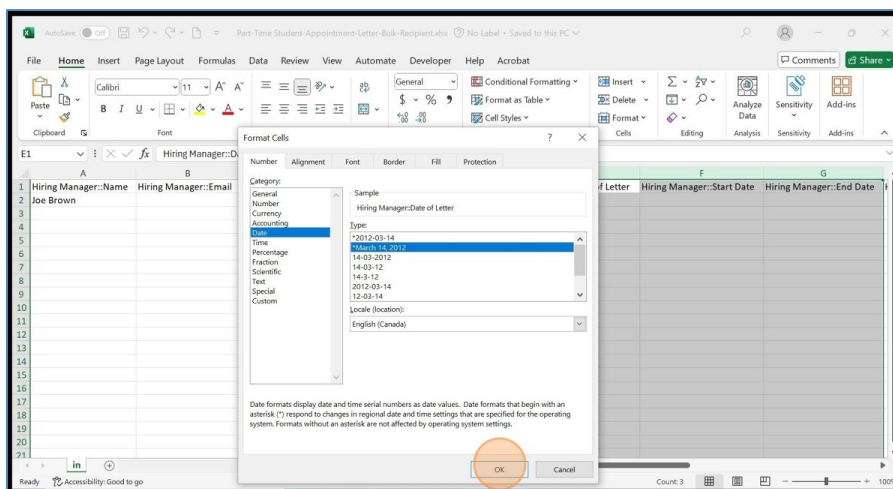
10) Click "Date"



11) Click the formatting that matches "March 14, 2012"

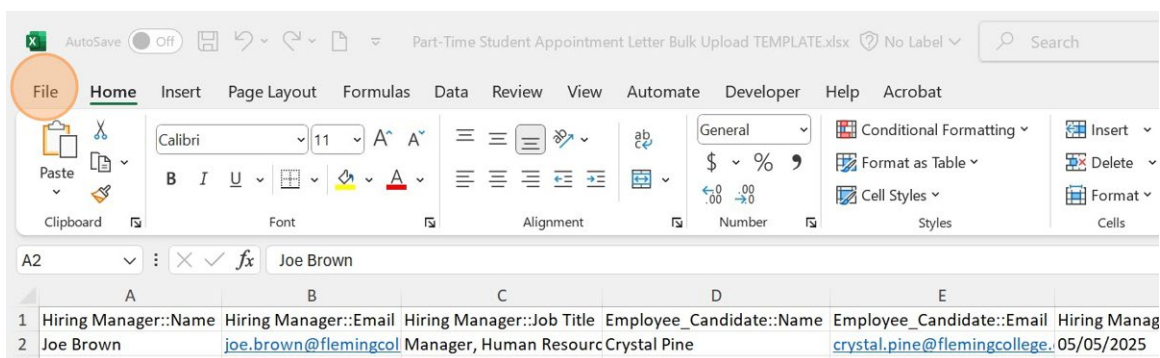


12) Click "OK"

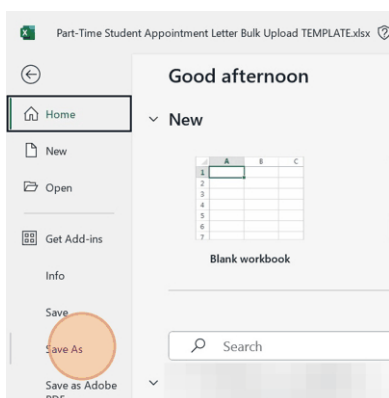


IMPORTANT: At this point, the CSV file should contain all the required information as outlined in Step 6 above.

13) Save your information. Click "File Tab"

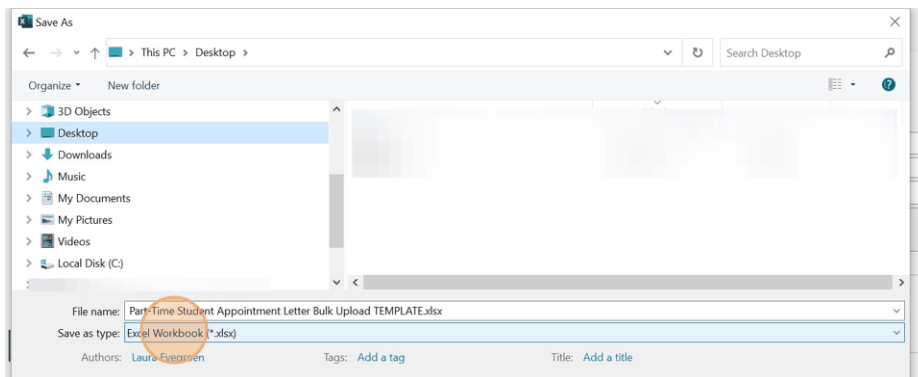


14) Click "Save As"

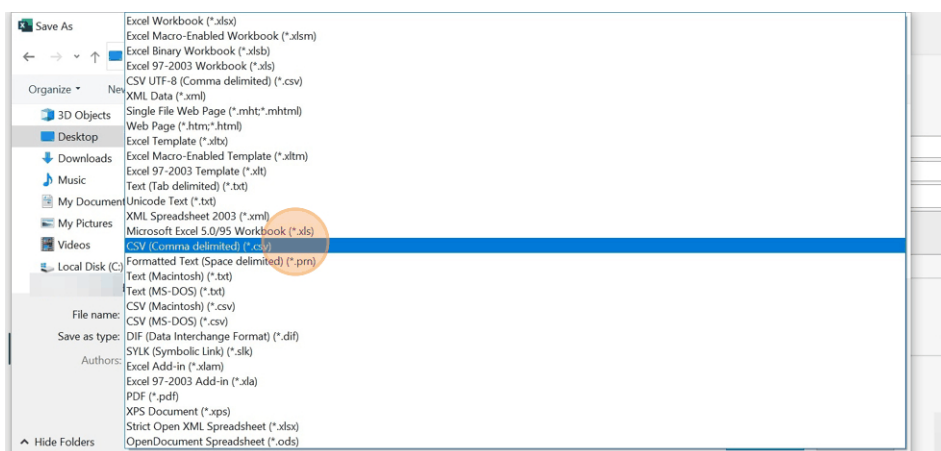


15) Choose your location to save the file. You can save it to your Desktop, Local Drive (e.g., C:), or a Shared Drive, depending on where you want it stored.

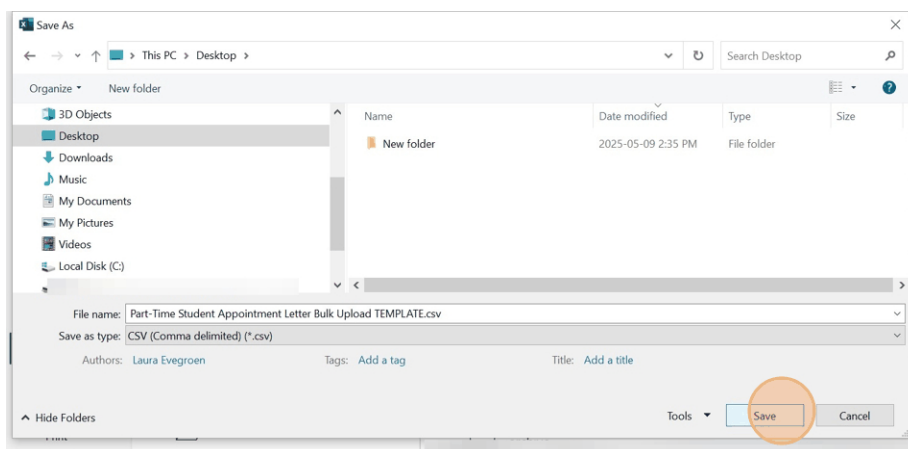
16) Click the "Save as type" drop-down menu (below the file name field),



17) Select "CSV (Comma delimited) (*.csv)" from the list.



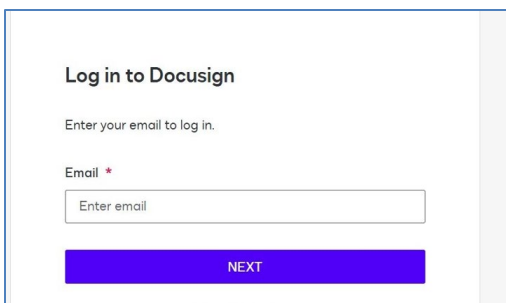
18) Give the file a name if needed. Click "Save"



IMPORTANT: After saving the file as a CSV, do not reopen it in Excel or Google Sheets, as date formatting may revert to an incorrect format. If you need to make changes, reopen your original spreadsheet (not the CSV), make your edits, then repeat steps 5–10 to re-save as a CSV before uploading to DocuSign.

Open DocuSign

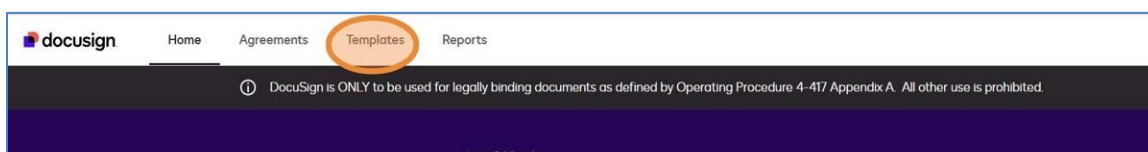
19) Sign in to your Fleming DocuSign account.



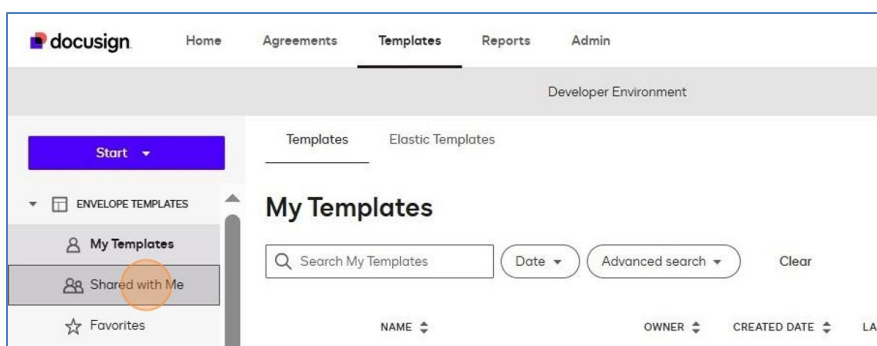
The image shows the DocuSign login interface. It has a title "Log in to Docusign". Below it is the instruction "Enter your email to log in." followed by an "Email" label with a red asterisk. There is a text input field with the placeholder "Enter email". At the bottom is a blue button labeled "NEXT".

Choose the Right Template

20) Go to the "Templates" page.



21) Select "Shared with Me".



22) Choose the correct template:

There are four templates. *OARI-specific templates, with language regarding funding, should be selected as appropriate.*

- **New or Rehired (6+ months):** This template will automatically send the new hire onboarding forms after the student signs their offer letter.

- **Active (Rehired Less Than 6 Months Break):** Students currently employed at Fleming or within the last 6 months.

Click Use

Part-Time Student New_Rehire (+ 6 month break) Eligible for matching	Fleming College Human Resources (Laura Evegroen)	2025-03-18 15:11	2025-06-05 13:36	Use
Part-Time Student Active (Rehired Less Than 6 Month B... Eligible for matching	Fleming College Human Resources (Laura Evegroen)	2025-03-18 15:34	2025-08-20 11:56	Use
Part-Time Student New_Rehire OARI Revised (+ 6 mont... Eligible for matching	Fleming College Human Resources (Laura Evegroen)	2025-08-26 09:36	2025-08-26 10:05	Use
Part-Time Student Active OARI Revised (Rehired Less T... Eligible for matching	Fleming College Human Resources (Laura Evegroen)	2025-08-26 09:15	2025-08-26 10:11	Use

23) Scroll down and click "Advanced Edit"

characters remaining: 38

Mail Message

Enter Message

[ADVANCED EDIT](#) [SEND](#)

Upload CSV File and Send Letter(s)

24) Click "Bulk Send."

Drop your files here or [Upload](#)

Optional_CAAT_Enrol...
1 page

Add recipients

☒ Set signing order [View](#) [Bulk send](#) **NEW**

Hiring Manager [Needs to Sign](#) [Customize](#)

25) Click "Upload a CSV" and click Next.

Choose how you'd like to upload your recipient list.

Choose how you'd like to upload your recipient list.


☐ Enter manually
Best for shorter lists. Type each recipient's name, role, and email address.

☒ Upload a CSV
Required for 10+ recipients. We'll provide a sample for formatting help.

[Sample CSV](#) [Next](#)

26) Click "Select File"

Upload a CSV



Drag and drop file here
Supported Formats: CSV

Select File

For help formatting your list, download the sample CSV.

27) Confirm recipient information. *Tip: While reviewing recipient information, you can make any necessary edits here before proceeding.*

Bulk Send

Recipients

All Recipients (1) Errors (0)

Hiring Manager::Name	Hiring Manager::Email	Student::Name	Student::Email	Hiring Manager::Hiring Delegation
L...	...@flemingco...	J...	...@flemingcolle...	n/a

28) Click "Save"


All Recipients (1) Errors (0)

Hiring Manager::Name	Hiring Manager::Hiring Delegate	Hiring Manager::Letter Date	Hiring Manager::Department	Hiring Manager::Payroll Department #
L...	n/a	January 12, 2024	School of ...	12

Back to Upload **Save**

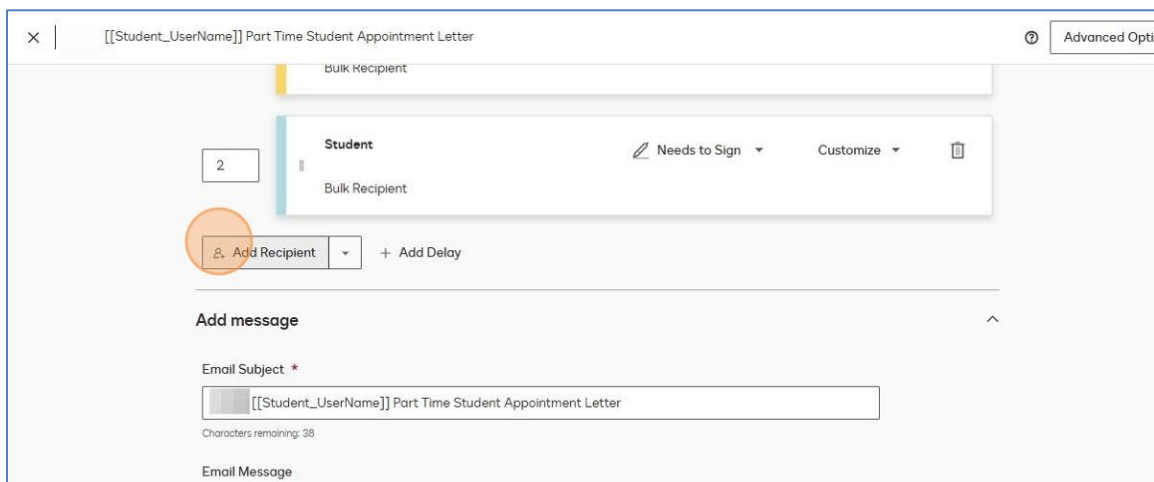
Optional: Add CC Recipients

Optional: Add a CC recipient (e.g. admin) via Add a Recipient. These individuals **will not need to sign**—they will receive a copy after signing the document.

 **Do not add HR or the person creating the letter** —copies will be sent automatically after the student signs.

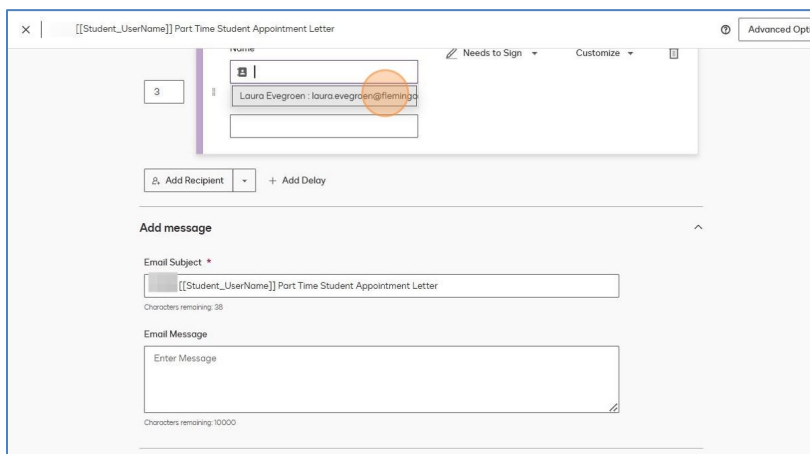
Skip to Step 33 below if you are not adding additional recipients.

29) Click "Add Recipient"



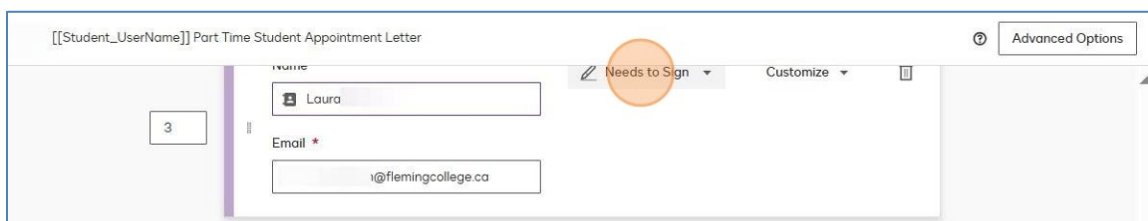
The screenshot shows the DocuSign interface for adding a recipient. The title bar reads "[[Student_UserName]] Part Time Student Appointment Letter". A dropdown menu is open, showing "Student" and "Bulk Recipient". The "Add Recipient" button is highlighted with an orange circle. Below the dropdown, there is a section for "Add message" with a text box for "Email Subject" containing "[[Student_UserName]] Part Time Student Appointment Letter" and a character count of 38. The "Email Message" field is empty.

30) Enter their Name and Email

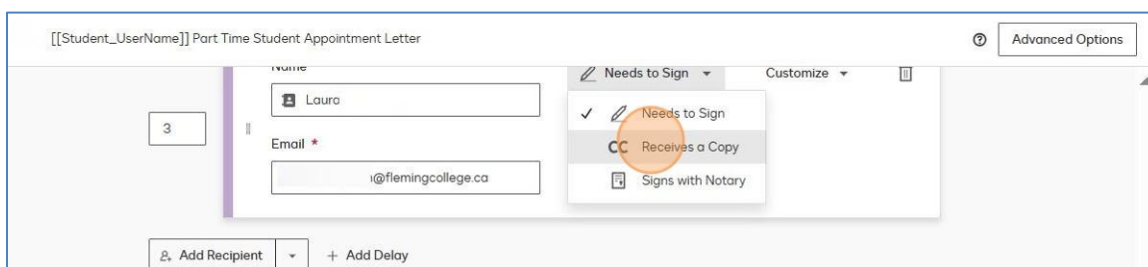


The screenshot shows the DocuSign interface for adding a recipient. The title bar reads "[[Student_UserName]] Part Time Student Appointment Letter". A dropdown menu is open, showing "Student" and "Bulk Recipient". The "Add Recipient" button is highlighted with an orange circle. Below the dropdown, there is a section for "Add message" with a text box for "Email Subject" containing "[[Student_UserName]] Part Time Student Appointment Letter" and a character count of 38. The "Email Message" field is empty.

31) Click "Needs to Sign".

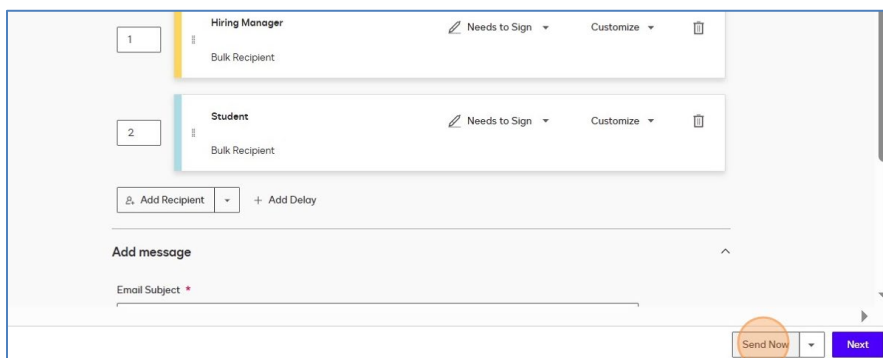


32) Choose "Receives a Copy"



Send Your Letters

33) Scroll down to the bottom of the screen and click "Send Now."



What's Happens Now?

1. The envelope is first sent to the hiring manager.
2. Once they sign, it is automatically sent to the student.
3. After the student signs, all parties (including the sender, even if they are not a signatory) receive a copy.

If you used:

- *Active Student template*: You're done!
- *New/Rehire template*: Student receives follow-up forms automatically.
 - HR will contact you in 5 days if the forms have not been completed and ask you to remind the student to do so.

Need Help?

- Contact: HR@flemingcollege.ca
- Additional resources:
 - Next: [How to Track and Manage Envelopes](#)
 - [DocuSign Tutorials](#)
 - [Information for Managers: Student Workers website](#)