How to Send Part-Time Student Appointment Letters Using DocuSign

Quick Start Guide

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Part 1 — Before You Start

You will need **A Fleming DocuSign account**

1. If you already have a Fleming DocuSign account, proceed to Part 2.
2. If you need to create an account
   - Click here to log in to DocuSign with your Fleming credentials.
   - Follow the on-screen prompts to complete your setup.
   - When your account is active, return to this quick start guide and continue with Part 2.

Part 2— Download and Save 2 Copies of the Bulk Send CSV template.

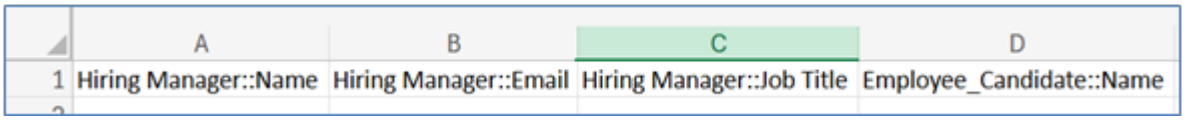
1. Download the Bulk Send CSV template by clicking here.
2. When you send the letters in DocuSign, you must choose the template that matches the student's employment status. There are two options:

   - **New or Rehired Student Employees** – students who are working at Fleming for the first time OR are returning after a 6+ month break.
   - **Returning or Current Student Employees** – students who have worked at Fleming within the past six months.

3. Save **two copies** of the CSV file (one for each student group).

Part 3— Fill in the CSV file

1. Open the appropriate file based on the group of student employees you are sending letters to (New/Rehired or Returning/Current).
2. Fill in the rows.



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

   You can send appointment letters to one or more students at a time— type a separate row for each student.

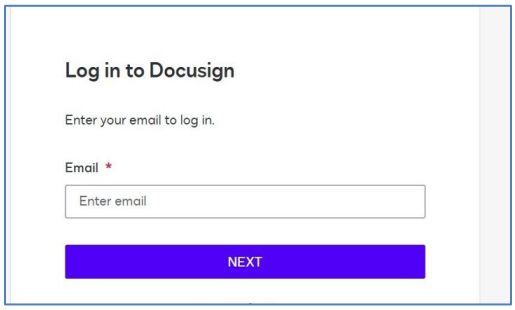
   Important Reminders:

   - **Fill in all columns** (*see Appendix A for detailed descriptions for each column*)
   - **Format dates** using the format "March 14, 2012" (*see Appendix B for steps to change the date format*).
   - **Do not** change column headers
   - **Avoid** special characters like ( ) : ; < > @

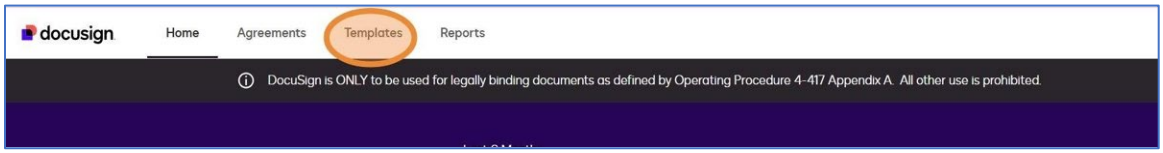
3. Save the file as a CSV. Do NOT reopen the CSV file after saving.

Part 3 — Send Letters in DocuSign

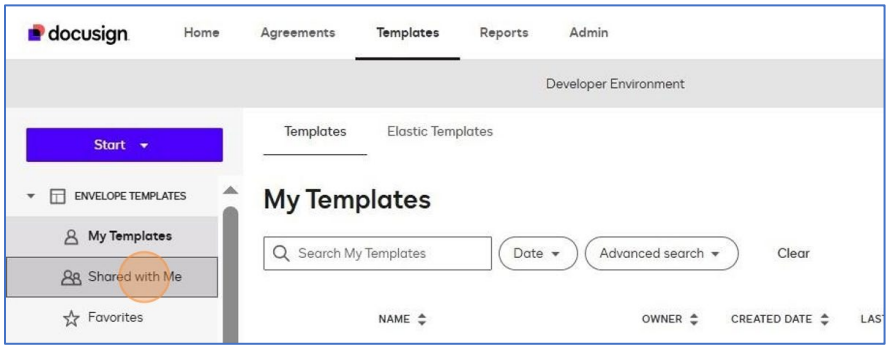
1. Log in to DocuSign.



2. Click Templates.



3. Click Shared with Me.



4. Choose the correct template. Click “Use” on the right of the template.

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

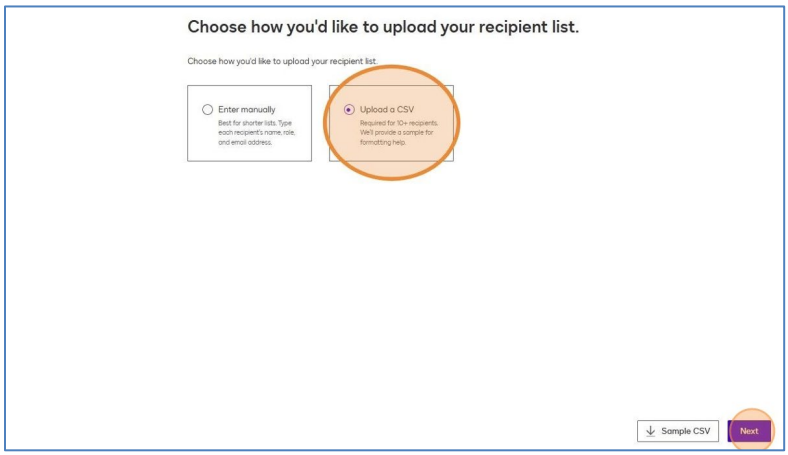
   - **New or Rehired (6+ months):** This template will automatically send the new hire onboarding forms after the student signs their offer letter.
   - **Active (Rehired Less Than 6 Months Break)**: Students currently employed at Fleming or within the last 6 months.

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

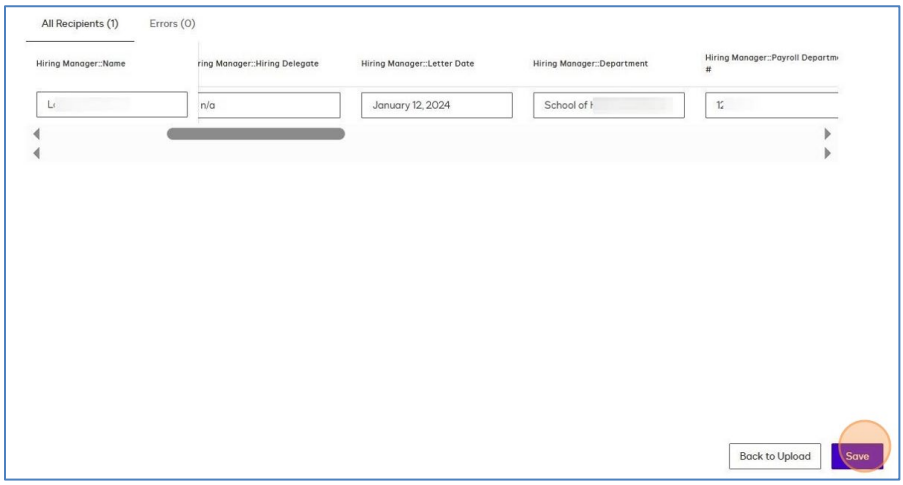
5. Scroll down and click Advanced Edit.

6. Click Bulk Send.

7. Upload your CSV and click “Next”.



8. Review your recipient information. Click Save.



9. (Optional) Add CC recipients. 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.

10. Scroll to the bottom of the page and click “Send Now”.

Part 4 — What Happens Next

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

Appendix A — CSV Field Descriptions

This section includes the detailed explanations for each CSV field.

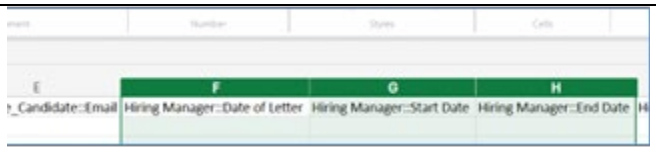
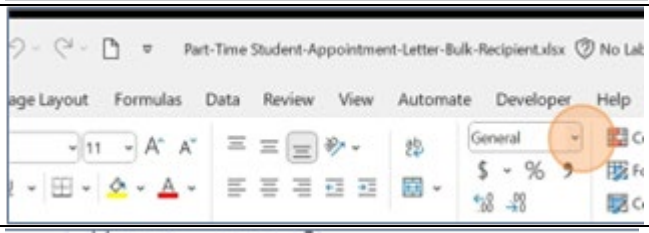
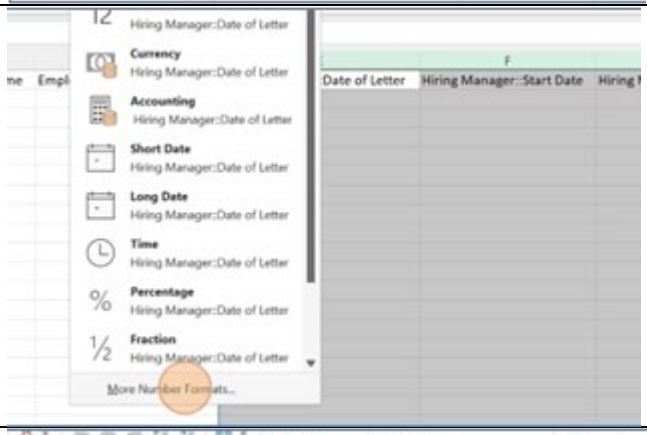
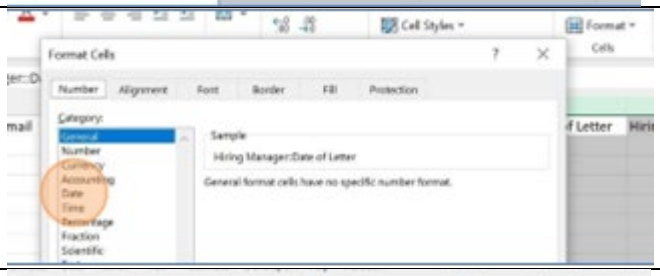
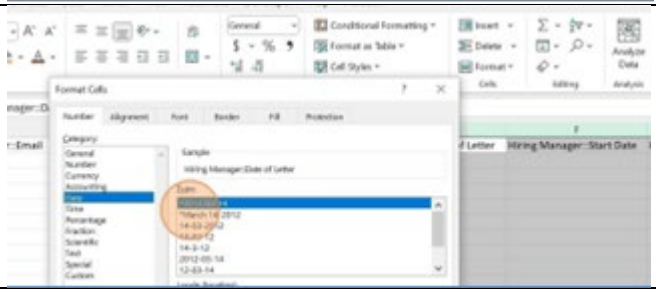
- **Hiring Manager::Name** - *John Smith*
- **Hiring Manager::Email-** *john.smith@flemingcollege.ca*
- **Hiring Manager::Job Title**- *Operations Manager, Research*
- **Employee_Candidate::Name -** *Student's full name*
- **Hiring Manager::Date of Letter -** *January 2, 2025*
- **Hiring Manager::Start 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*

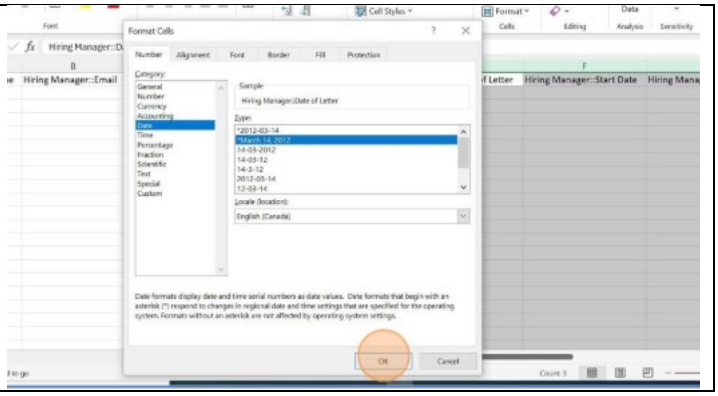
  Important Note: If the employee is working at a location other than those above, type the specific location name and physical address.
- **Hiring Manager::Hours Per Week -** *up to 12* OR *12 etc.*
- **Hiring Manager::Initial Anticipated Hours of Work –** *Monday to Friday, 8:30 a.m. to 4:30 p.m.* OR *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*

Appendix B— How to Format Dates

You need to format columns F, G and H (dates) using the format "March 14, 2012".

1. Highlight columns F, G and H.	
2. Click the down arrow beside "General" in the number section.	
3. Click "More Number Formats..."	
4. Click "Date"	
5. Click the formatting that matches "March 14, 2012"	

6. Click "OK"	 Format Cells Number Alignment Font Border Fill Protection Category: General Number Currency Accounting Date Time Percentage Fraction Scientific Text Special Custom Sample Hiring Manager::Date of Letter Type: *2012-03-14 *March 14, 2012 14-03-2012 14-03-12 14-3-12 2012-03-14 12-03-14 Locale (location): English (Canada) Date formats display date and time serial numbers as date values. Date formats that begin with an asterisk (*) respond to changes in regional date and time settings that are specified for the operating system. Formats without an asterisk are not affected by operating system settings. OK Cancel Hiring Manager::Email Hiring Manager::Start Date