

How to access DocuSign Templates

To access DocuSign, log into GT eSignature

<https://esignature.gatech.edu/>

GT Georgia Tech eSignature

LOGIN Get Started Campus Forms FAQ Support

Document Security
Understand Protected Data
Follow These Steps to Send Protected Data!

DocuSign & Protected Data

GT eSignature MS Teams
Access Training Videos
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Get Updates
Click Here to Join!

SIGNATURE AUTHORITY
Understand Georgia Tech and USG signature policies

ESIGNATURE BASICS
Review eSignature Basics in our Support Section

DOCUSIGN CONTACTS
Use the DocuSign Address Book to find GT recipient emails

SUPPORT
Need help? Learn how to get support

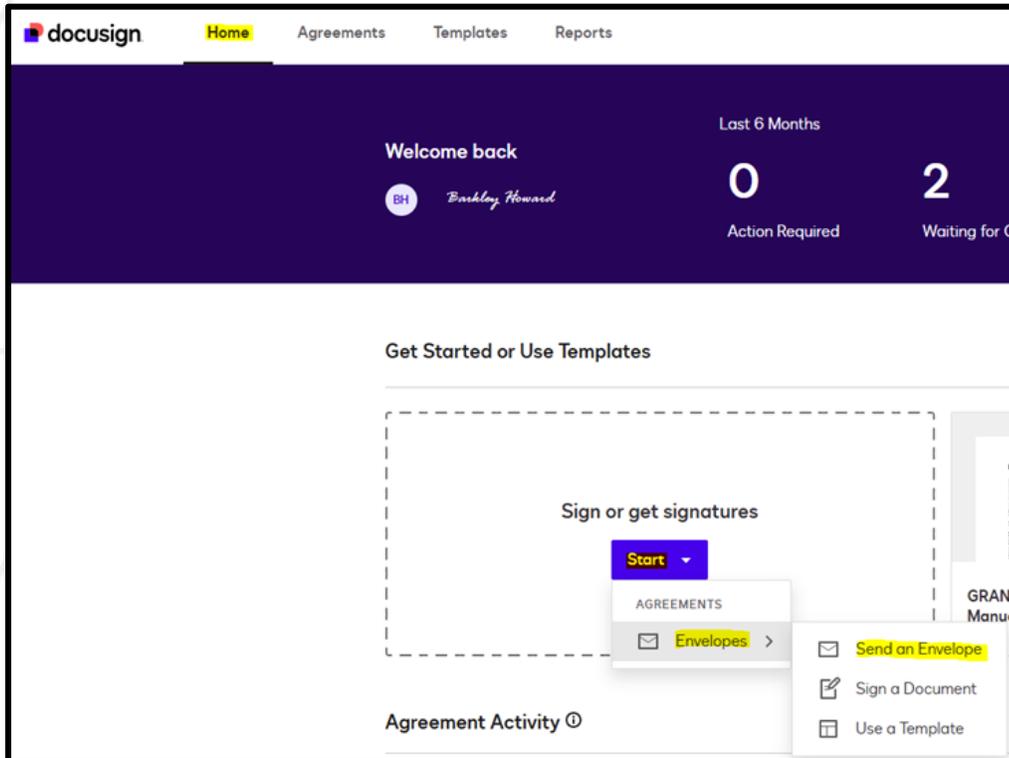
LOGIN
Login using your GT Account and password

Create a New Agreement Envelope

1. Navigate to the home screen.
2. Place an ASR file inside the dashed box labeled "Sign or get signatures."

Alternatively

3. Select Start → Envelopes → Send an Envelope

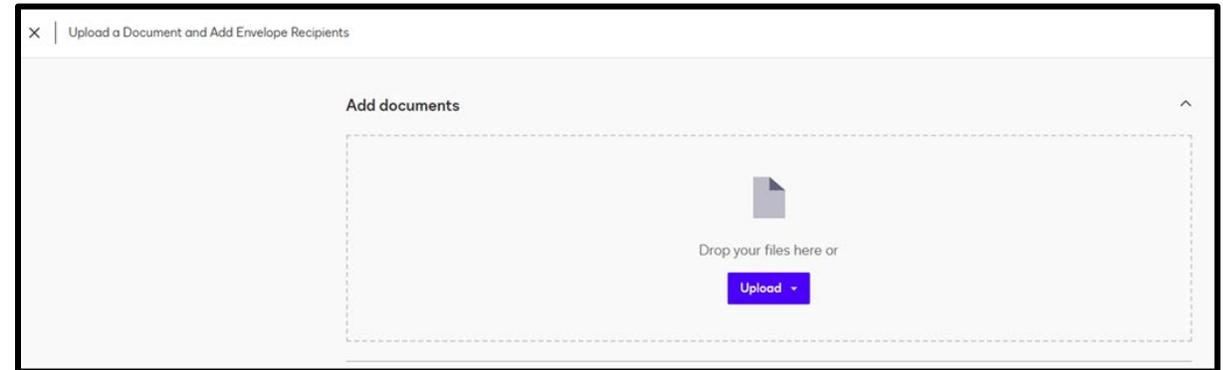


Continue to step four or five only if Step Three was chosen. Skip steps four and five if Step Two was completed.

4. Place an ASR file inside the dotted box labeled "Drop your files here or"

Alternatively

5. Select Upload



Apply Template

- When you upload an ASR file, DocuSign automatically detects the file type and prompts you to select the matching template. There are **two ASR formats** – each with its own set of DocuSign templates:

1. Cognos Version (current ASR website)

- Provided to UFM's by G&C when the annual ASR certification period opens in July.
- DocuSign template names end in **“Cognos”**

2. Tableau Version (LITE off-boarding report)

- Generated from LITE report: *ASR (Effort Reports) for Off-Boarding Employees and Prior Year Cost Transfer*
- Used for employees **leaving before** the July annual certification cycle (graduating students and non-student off-boarding employees)
- DocuSign template names end in **“Tableau”**

The screenshots to the right show how the template pop-up looks for each format.

Select matching templates

Select the matching templates to apply to your uploaded documents.

FY25_ASR Report.pdf ^

Template Name	Match	Pages
<input type="checkbox"/> GRANTS-Manual_ASR_First-Hand_Confirmation_Only_Cognos	84%	1-1
<input type="checkbox"/> GRANTS-Manual_ASR_Individual_Employee_Only_Cognos	84%	1-1

Cancel Apply

Select matching templates

Select the matching templates to apply to your uploaded documents.

FY26 eASR for Geroge Burdell.pdf ^

Template Name	Match	Pages
<input type="checkbox"/> GRANTS-Manual_ASR_First-Hand_Confirmation_Only_Tableau	100%	1-1
<input type="checkbox"/> GRANTS-Manual_ASR_Individual_Employee_Only_Tableau	100%	1-1

Cancel Apply

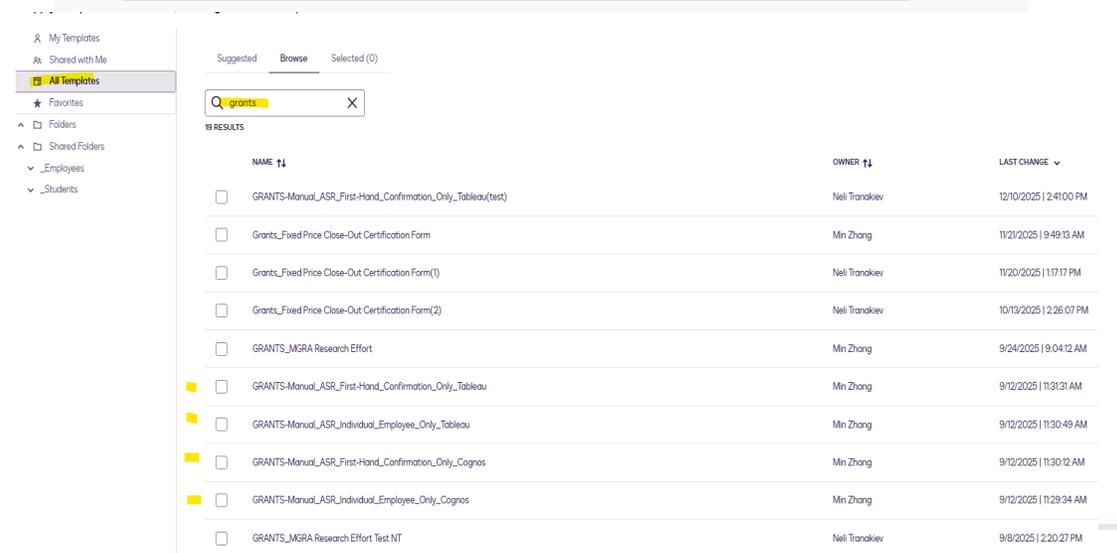
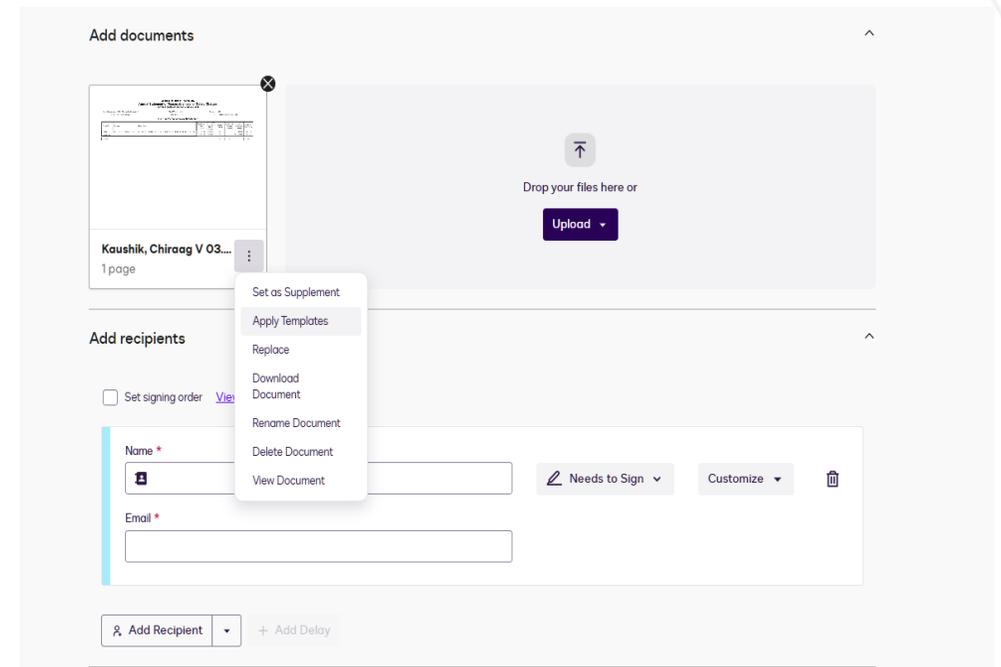
Apply Template

Which Template Should You Select?

- Select **Individual Employee** if the employee is self-certifying
- Select **First-Hand Confirmation** if a PI or supervisor is certifying on the employee's behalf
- Select **only one** template box before clicking Apply

If No Auto-Match Appears – Apply Manually:

1. Start a new envelope: Go to **Start** → **Envelopes** → **Send an Envelope**
2. Upload the ASR file (drag-and-drop or click **Upload**)
3. If the template pop-up does **not** appear: click the **three dots** (“More Options”) on the uploaded document, then select **Apply Templates**
4. Search **GRANTS** in the template search bar, then select the appropriate template:
 - GRANTS-Manual_ASR_Individual_Employee_Only_[Tableau/Cognos]
 - GRANTS-Manual_ASR_First-Hand_Confirmations_Only_[Tableau/Cognos]



Add Recipients

Add recipients

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

Set signing order [View](#)

1

First-Hand Confirmation Needs to Sign Customize

Name *

Email *

2

Sender Needs to Sign Customize

Name *

Email *

1. Recipient 1: Enter the name and email address of the certifying employee or the first-hand knowledge confirmer, depending on the selected template.

Note: If the covered employee is unable to complete the ASR, the certification may be signed by the employee's supervisor, principal investigator (PI), or another organizational unit head. The signer must have firsthand knowledge of all the employee's activities and use appropriate means of verification to confirm that the work was performed.

2. Recipient 2: Enter the name and email address of the Unit Financial Manager (UFM) certifying the ASR.

Note: UFM's must ensure that the reported amounts on the ASR align with department payroll and commitment accounting records before signing. However, UFM's are not required to know the exact effort of each employee.

3. Select Send Now.

Note: After all signatures are obtained, the completed ASR will automatically route to the G&C Cost Accounting team.