

# DOCUSIGN USER GUIDE

## How to review, delegate and sign funding agreements

May 2026

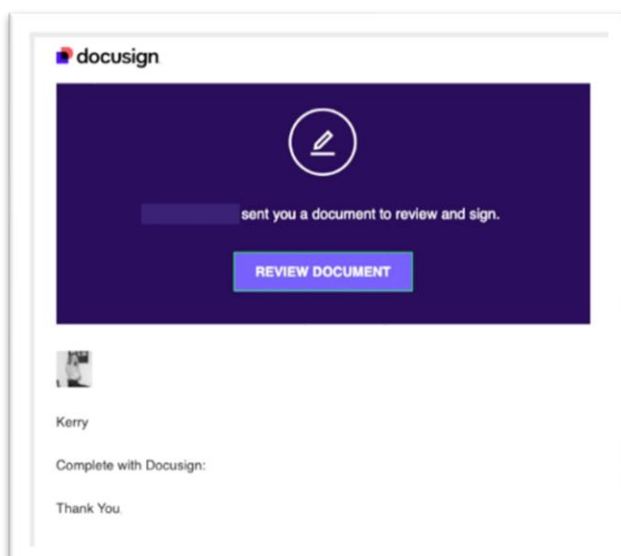
This guide explains how Murray PHN commissioning partners can review, download and execute Murray PHN funding agreements using DocuSign. This includes when and how to specify a signing recipient, how to decline or sign where required, and what happens once all parties have executed the agreement.

*The screenshots shown or referenced within this guide are from a provider/recipient view of DocuSign. Your screen may look slightly different depending on the device and browser being used.*

### 1. Receiving your Murray PHN funding agreement

You will receive an email from DocuSign on behalf of Murray PHN asking you to review and sign a funding agreement or grant.

- The email is akin to receiving a secure electronic ‘envelope’ containing the proposed funding agreement.
- The envelope enables you to:
  - review and download the proposed funding agreement
  - specify who is authorised to sign on behalf of your organisation
  - automatically receive a fully executed copy once all parties have signed.
- The DocuSign envelope is sent to the **designated Contract Reviewer** nominated by your organisation.



## 2. Reviewing the funding agreement

Once the document opens, the DocuSign signing screen will appear. You can:

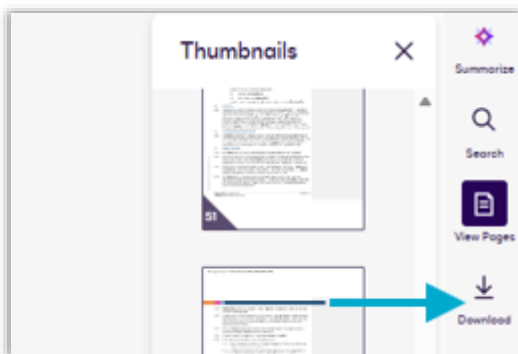
- scroll through the agreement to review all terms and schedules
- use the page **thumbnails or navigation panel** to move between sections
- download or print a copy for offline or internal review.



## 3. Downloading or printing a copy

You can download or print the agreement **before or after execution**. From the signing screen:

- select the Download icon to save a copy (combined or separate PDFs).



- Select the Printer icon to print the document.



**File size note:** Combined PDFs are limited to 100MB. If you receive an error, download the documents as separate PDFs instead.

## 4. Specifying who will sign the funding agreement

### 4.1. When is this used?

The **Specify Recipients** function is used where:

- your organisation has identified a Contract Reviewer as a designated first point for receipt of the funding agreement for review before it is signed by a person with the appropriate authority to sign, or
- the authorised signatory was not known at the time the agreement was issued.

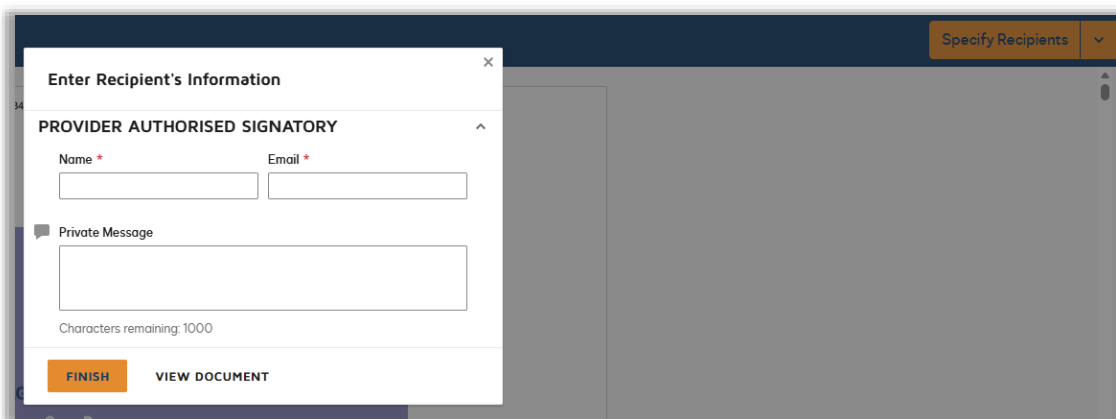
This allows responsibility to be assigned **within your organisation** by recipients when the funding agreement is received and **at a time that is appropriate to the recipient** (such as after internal reviews have occurred at your organisation).

### 4.2. Role of the Specify Recipient Manager

If DocuSign prompts you to specify a recipient, you are acting as a **Specify Recipient Manager**. In this role, you can:

- enter the name and email address of the authorised signatory
- add or edit a message associated with the envelope.

Once complete, select Finish to send the agreement to the next recipient in the signing order.



### 4.3. Important warning about messages:

Messages entered in DocuSign form part of the official contract record. Any message added is:

- stored as part of the envelope history
- visible to Murray PHN, relevant recipients, users with shared access, and DocuSign account administrators.

Do not include confidential, sensitive or negotiation-related commentary in DocuSign messages.

## 5. Declining to sign (where required)

If, after review, you are not able to execute the funding agreement, DocuSign provides an option to Decline to Sign.

- Selecting **Decline to Sign** will notify Murray PHN that the agreement has not been executed
- You will be prompted to provide a brief reason for declining (this forms part of the envelope record)
- No changes are made to the agreement through DocuSign.

Where you decline to sign, Murray PHN recommends you **contact your usual Murray PHN contract or program representative** to discuss next steps.

## 6. Executing the funding agreement

When you are ready to execute the agreement:

- a. Select the Start tag to be guided to the required fields

The screenshot shows a DocuSign document execution interface. On the left, there is a vertical bar with a 'Sign' button. The document content includes fields for Title (Michelle Allan), Witness Name, Signature (Director General Counsel, Procurement and Contracts), and Date (07 May 2026 | 3:46 PM AEST). A 'Sign' button is highlighted with a blue box.

- b. Complete each Sign or Initial tag as prompted

The screenshot shows a 'Required - Sign Here' tag. Below the tag is a 'Sign' button with a downward arrow icon.

- c. Apply your signature (draw, select, or upload)

The screenshot shows the 'Adopt Your Signature' dialog box. It prompts the user to confirm their name, initials, and signature. The 'Full Name' field contains 'Test Case' and the 'Initials' field contains 'TC'. The 'SELECT STYLE' tab is selected, and the 'PREVIEW' section shows a signature and initials. The 'Adopt and Sign' button is highlighted.

- d. Select Finish to complete execution

The screenshot shows the DocuSign interface with the 'Finish' button highlighted. Below the button is a list of tags, including a diamond icon, a document icon, a signature icon, a downward arrow icon, and a refresh icon.

This action will progress the agreement to the next signatory.

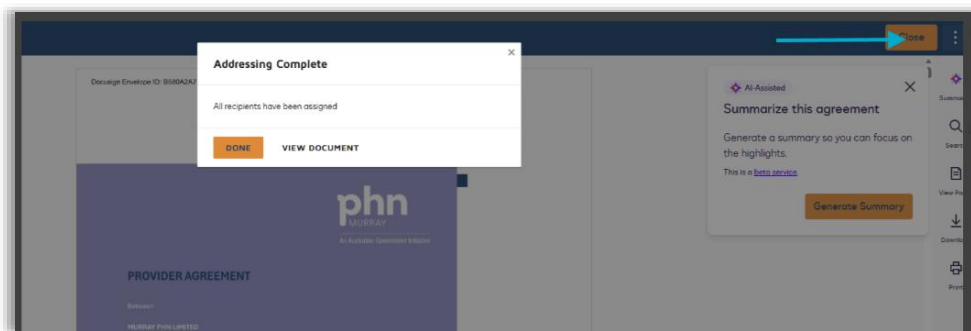
## 7. Finalisation and record-keeping

Once **all parties have executed** the funding agreement:

- A **fully executed copy** is automatically emailed to:
  - all signatories
  - Murray PHN Procurement and Contracts team.
- The agreement is retained as part of Murray PHN's official contract record

You may also download the completed agreement from DocuSign for your own records.

Note: Where the size of the pdf exceeds 5MB, DocuSign will only send a link to the completed contract, not a PDF attachment.



### Further assistance

For technical issues with DocuSign, email [contracts@murrayphn.org.au](mailto:contracts@murrayphn.org.au) or phone 03 4408 5600.

For agreement-related queries or discussions, speak to your Murray PHN contract business partner.