

DocuSign Upload Instructions

Many of the Foundation forms are interactive and are not compatible to upload directly into DocuSign. The instructions below will guide you to upload your pre-filled forms into DocuSign.

Windows

Mac

Windows:

Steps

1. Download your form from the Foundation Forms, Guides and Policies page.
2. Open the PDF document in Adobe Acrobat or Adobe Reader.
3. Fill out the form so you only need the signatures.
4. Print the document as a PDF.
 - a. This allows the document to be 'flat' without interactive features to upload to DocuSign.
 - b. Click File > Print or Ctrl + P.
 - c. When the Print dialogue box pops up, click the drop down menu for the Printer.
 - d. Select Adobe PDF or Microsoft Print to PDF.
 - e. A 'Save Print Output As' box will pop up.
 - f. Select a location and name the new PDF.
 - g. Click Save.
5. Open DocuSign in your browser.
6. Click New > Send an Envelope.
7. Click Upload to upload your newly created 'flat' document for signatures.
8. Proceed in creating your DocuSign document.

Mac:

Steps

1. Macs do not allow 'Print to PDF' by default so you'll need an app to process it.
2. Go to the App Store
3. Search for 'PDF Printer Lite.'



- a. PDF Printer Lite is a free app.
 - b. PDF Printer Lite is a limited application as it will only 'print' two pages.
 - c. Most documents are not more than two pages but if you are working with documents with more pages, you can pay for the upgrade to PDF Printer or merge PDF documents using Adobe Acrobat.
4. Install PDF Printer Lite.
5. Download your form from the Foundation Forms, Guides and Policies page.
6. Open the PDF document in Adobe Acrobat or Adobe Reader.
7. Fill out the form so you only need the signatures.
8. Print the document as a PDF.
 - a. This allows the document to be 'flat' without interactive features to upload to DocuSign.
 - b. Click File > Print or Command + P.
 - c. When the Print dialogue box pops up, click the drop down menu for the Printer.
 - d. Select PDF Printer Lite.
 - e. A 'Save Print Output As' box will pop up.
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 - g. Click Save.
9. Open DocuSign in your browser.
10. Click New > Send an Envelope.
11. Click Upload to upload your newly created 'flat' document for signatures.
12. Proceed in creating your DocuSign document.