Osprey Approach: DocuSign Integration

This help guide was last updated on Oct 8th, 2021

The latest version is always online at https://support.pracctice.com/?p=29897

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Who is this guide for?

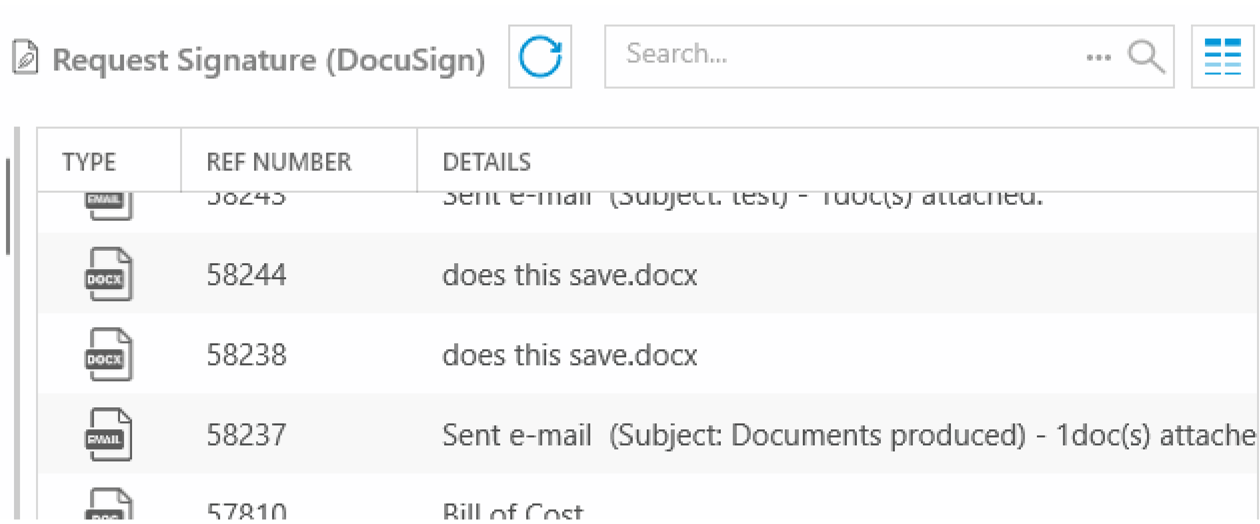
Case Workers

Our Case Management App offers integration with DocuSign which allows you to enable your clients and associates to sign documents through the online portal.

To setup the templates to accept signatures please review our DocuSign Anchor Text guide.

Step 1

Select Case Management and then Documents



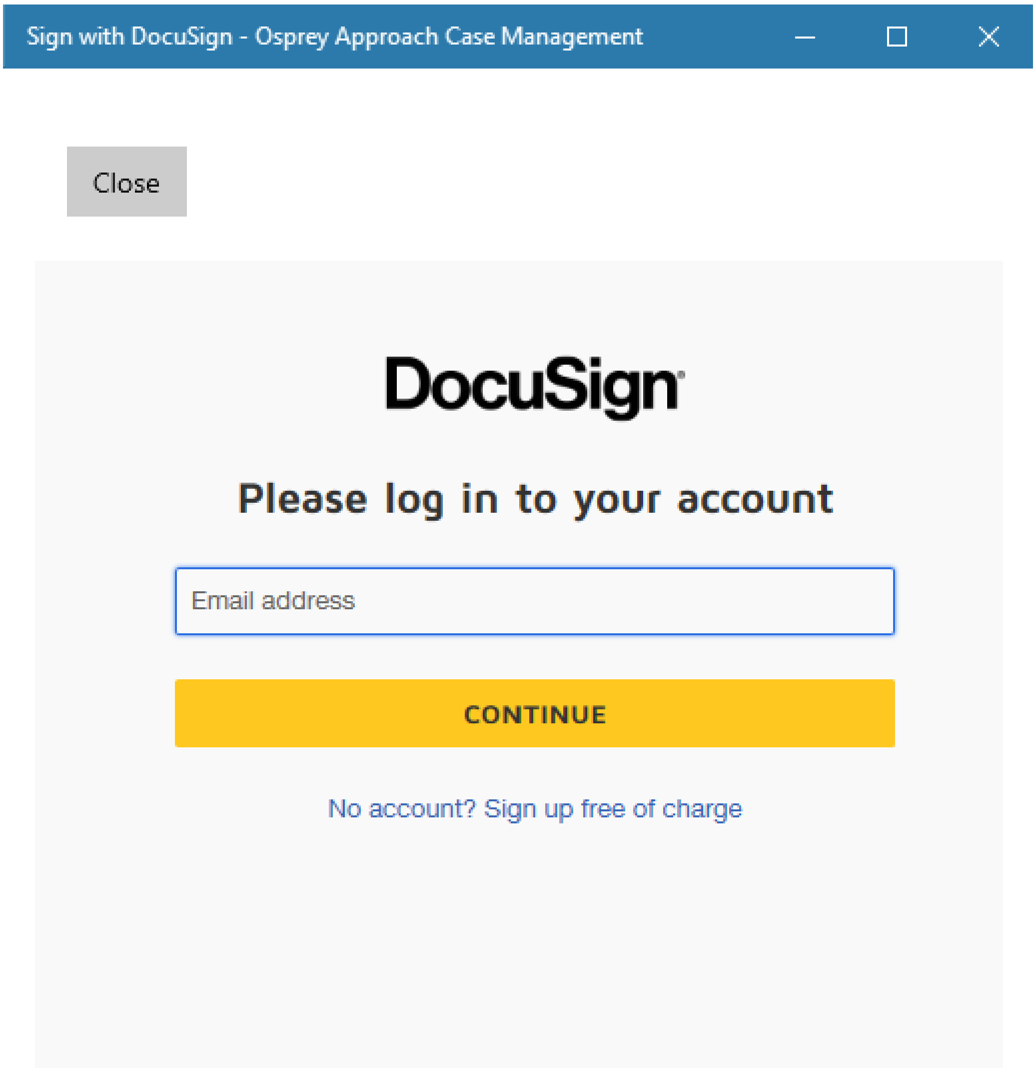
Select a document and then Request Signature (DocuSign)

Please note that only Word documents can be used. If a PDF is selected, then a warning will appear advising of this.

You may also select multiple Word documents.

Step 2

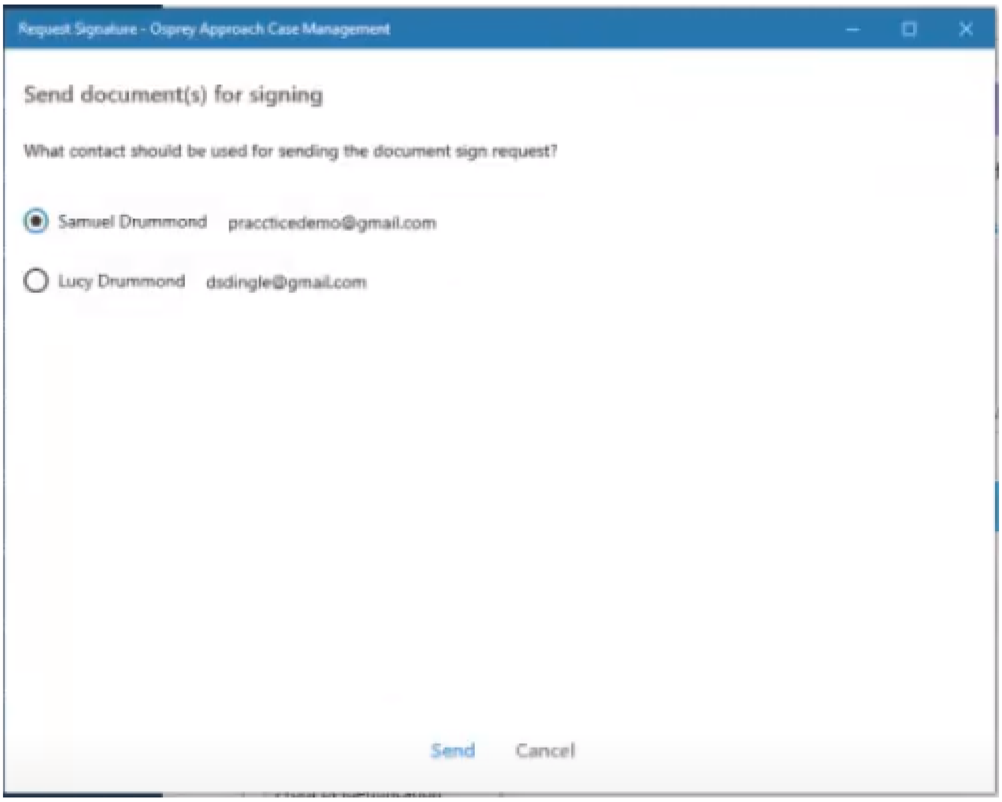
You will now be prompted to log into DocuSign. Enter your email address, password and encryption code.



After logging in once, this will create a login token, so you will not need to log in again.

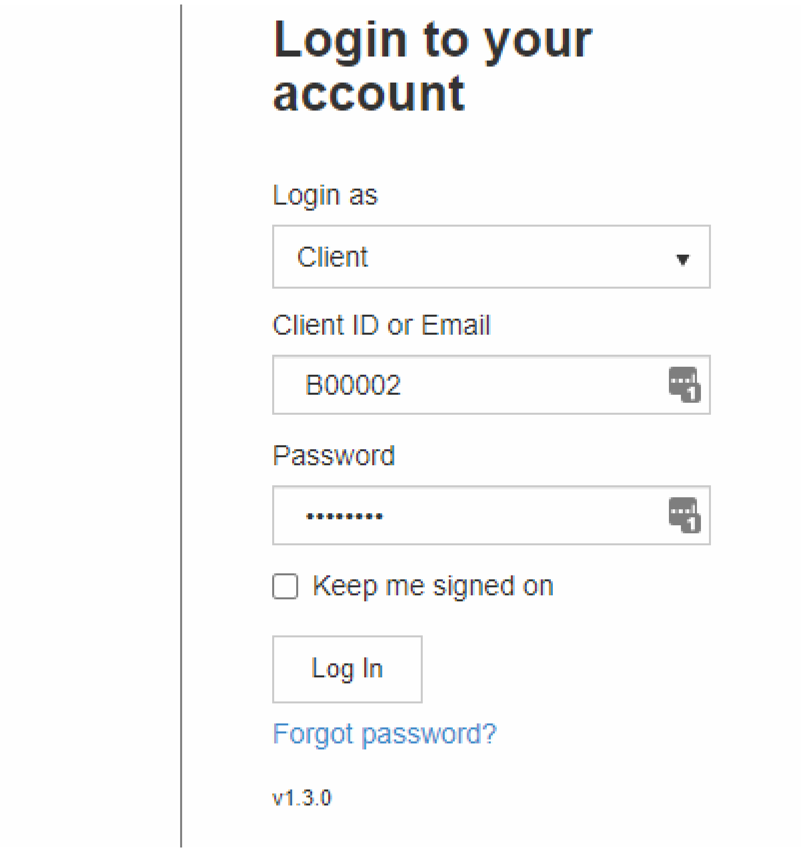
Step 3

You can now select a contact to send the signature request to.



Step 4

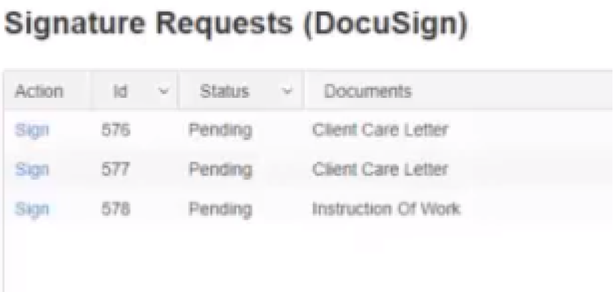
Now that this has been sent, the recipient can log into the Client Access Portal, providing they have been given access.



Once logged in they can select the appropriate matter

Step 5

Navigating to the bottom of this screen will show any pending signatures.



Signature Requests (DocuSign)

Action	Id	Status	Documents
Sign	576	Pending	Client Care Letter
Sign	577	Pending	Client Care Letter
Sign	578	Pending	Instruction Of Work

The user can select Sign to view the document.

Step 6

Once open, the signature and date can be dragged and dropped into the document wherever they need to go.

Other fields are available if required.

Step 7

Select Finish. The user can then close the document.

Step 8

Now if we navigate back to the Case Management App.

We can see that the document has now been changed to a PDF. Indicating that this document has been signed by the client or associate.

You will receive an email when your client or associate views and signs the document.

Selecting Signature Requests in Documents shows the status of any requests

ACTION	STATUS	SIGNER ID	REF NUMBER(S)	NAME	EMAIL	DETAILS
	Pending	WO0009	59497	Richard Wood	richard@pracctice.net	Client Care Letter
	Pending	WO0009	59498	Richard Wood	richard@pracctice.net	Client Care Letter
	Completed	WO0009	59543	Richard Wood	richard@pracctice.net	Instruction Of Work

Pending requests may also be removed.