Montana Acquisition & Contracting System (eMACS)

Preparing a Contract for eSignature

OVERVIEW

The goal of this task is to prepare a contract for eSignature in Total Contract Manager. The eMACS eSignature feature provides the ability to sign contracts electronically using an integration with DocuSign, making it easy and efficient to submit contracts to several different parties for their approval and signature.

In order to prepare a contract for eSignature, it must be in *Draft* status (when the contract is being created). You must be a Contract Manager, and the contract must be currently checked out to you.

If you have questions or for more information, contact the eMACS Support Unit, emacs@mt.gov.

ADDING ESIGNATURE TO A CONTRACT

1. Navigate to **Catalogs and Contracts > Contracts > Search Contracts.** (If you are in the process of creating a contract, skip to step 3.)
2. Search for the contract to which eSignature should be added, and once found, click on the contract.
3. Click **Header** from the contract creation menu on the left.
4. Choose **Yes** next to **Use eSignature for this contract?**, in the **Contract Header** section of the page.

ADDING SIGNERS TO A CONTRACT

1. In the contract creation menu on the left, click **eSignature**.
2. Click the **Add Signer** button.
3. In the **Add Signer** pop-up window:
   - **Contract Party**: choose which party will be signing the contract.
   - **Choose a contact**: choose which contact person will represent that party. If a different contact person is needed than those listed, choose **Manually Enter Signer** and enter the contact's **Name, Email,** and **Title** (optional).
   - Click **Save Changes** to add this signatory to the contract.
4. Repeat this process to add more signers to this contract.
5. If needed, use the **Edit** drop-down menu on the right side of the screen to edit each signer's details, and re-order the sequence of signatures.

RELEASING THE CONTRACT INTO APPROVAL WORKFLOW

1. Continue with creating the contract, and once all sections of the contract are complete, release it into the contract approval workflow:
   - Select **Submit for Approval** on the left side of the screen.
   - The contract's status will change to *Pending Signature*.
2. Be aware that once the contract is in approval workflow, you cannot add more signers or update any sections of the contract.

PREPARING THE CONTRACT FOR ESIGNATURES

1. Once the contract has successfully passed through approval workflow, return to the contract in Total Contract Manager, and click **Contract Actions** from the top right corner.
2. From the drop-down menu, select **Launch eSignature**.
   - This action will open DocuSign and allow you to prepare the document for eSignatures as well as send it to the signers.
   - Refer to the Total Contract Manager Handbook for further instructions on DocuSign.

EXPLORING THE SIGNERS' PROCESS

1. All signers will receive a notification asking them to electronically sign the contract.
2. If a signer does not have access to Total Contract Manager, they will receive an email with a link to open the contract in the eSignature tool and submit it as usual.
3. The contract will open in DocuSign, and can be electronically signed and submitted.

LAST STEP: UPLOADING THE FULLY EXECUTED CONTRACT

1. Once all of the approval eSignatures have been collected, return to the contract in Total Contract Manager, and click **Amendment Actions** from the top right corner.
2. From the drop-down menu, select **Upload Fully Executed Contract**.
3. The contract will return to its regular workflow, eventually ending in the *Executed* status.