📄 *How to Safely Pass Around a DocuSign Envelope (Without Breaking Anything or Losing Any Data Entered Already)*

🔧 1. Start Filling Out Your Section

- Open the DocuSign email you received.
- Click "Review Documents".
- Start filling in your assigned sections.
- IMPORTANT: Do NOT click "Finish" yet if someone else still needs to help.

- **🔧 2. Save Your Work**
  - Click "Finish Later" when you're ready to pass the envelope to someone else.
  - This saves everything you entered so far.

- **🔧 3. Open the Original DocuSign Email**
  - Find the original DocuSign email you were sent.
  - DO NOT forward the email — forwarding will break the link!

- **🔧 4. "Reply" the Email to the Helper**
  - Open the original DocuSign email.
  - Click "Reply" (NOT Forward).
  - Delete the original sender's email and enter your helper's email address instead.
  - Example note to include:
    "Hi [Name],
    Please click the link below to complete your portion. Remember to click 'Finish Later' once you are done!"
  - Send the email.

- **🔧 5. Helper Completes Their Section**
  - Helper clicks the "Review Documents" link from the Reply email.
  - Completes their fields.
  - Clicks "Finish Later" when done (not "Finish").

- **🔧 6. Helper Replies It Back**
  - Helper opens the email they received.
  - Clicks "Reply".
  - Removes their own email from the "To" field.
  - Enters the original recipient's email address back in.
  - Example note to include:
    "Finished my part — sending it back to you!"
  - Send it back.

- **🔧 7. Final Completion**
  - Original person (FC or PI) opens the reply email.
  - Clicks the Review Documents link.
  - Completes any remaining fields.
  - Finally, clicks "Finish" to submit the entire packet.

⚠ REMINDERS

- Always click "Finish Later" if you're passing it along.
- Always use "Reply", NEVER "Forward".

- Always use the original DocuSign email.
- Only click "Finish" when the entire packet is complete.