

## INTRODUCTION

Inserts are separate forms in Microsoft Word format posted to the “inserts” tab of the online proposal website [dspproposal.com](http://dspproposal.com). RFP Bidders complete all applicable Inserts and provide additional verification on the identity of the signatory when required. Some Inserts require either that the signature be notarized or that the signature be digital and accompanied by a document or information that verifies the identity of the signatory. Other Inserts allow for (i) a scanned wet signature or electronic signature as long as the Insert is submitted by email by the signatory or with the signatory on copy; or (ii) a digital signature with a document or information that verifies the identity of the signatory. Other than Inserts completed with a scanned or electronic signature for which email transmission is required, documents required to support the Part 1 Proposal may be uploaded to the online Part 1 Form.

For purposes of completing an applicable Insert, a “digital” signature is one that is created using commercially available software (such as DocuSign, Adobe Acrobat, or Adobe Sign), which generates an additional document or information that can be used by the Independent Evaluator to verify the identity of the signatory. A digital signature is different from an “electronic” signature, which is computer-generated but is not created using a software that generates additional documentation or information that can be used to verify the identity of the signatory. An example of an electronic signature is an image of a signature.

RFP Bidders may complete all applicable Inserts using a digital signature with an accompanying document to verify the identity of the signatory. However, digital signatures are not required. For each Insert there is an alternative acceptable method for completing the Insert; each Insert contains instructions describing the acceptable methods of completion and submission for that specific Insert.

1. Inserts such as the P1-6 P1 Certifications (A) Insert can be completed as follows:

- a. Submitted with a digital signature with an accompanying document or information verifying the identity of the signatory; or
- b. Signed with the signature notarized. Each such Insert can be uploaded to the online form or sent by email to the Independent Evaluator at [pecoprocurement@nera.com](mailto:pecoprocurement@nera.com).

2. Inserts such as the P1-1 Representative Insert can be completed as follows:

- a. Submitted with a digital signature with an accompanying document or information verifying the identity of the signatory (if digitally signed, the Insert may be uploaded to the

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online form, or sent by email to the Independent Evaluator at [pecoprocedure@nera.com](mailto:pecoprocedure@nera.com));  
or

b. Submitted with a scanned wet signature or submitted with an electronic signature (if not digitally signed the Insert must be sent by email to the Independent Evaluator at [pecoprocedure@nera.com](mailto:pecoprocedure@nera.com) by the signatory or with the signatory on copy).

In this document, the Independent Evaluator provides instructions on how to obtain the additional document or information that verifies the identity of the signatory for Inserts that are digitally signed using DocuSign or a document signing certificate in Adobe Acrobat. This does not preclude an RFP Bidder from using other commercially available software as long as such software generates an additional document or information that can be used by the Independent Evaluator to verify the identity of the signatory.

If electing to complete an Insert with a digital signature created in DocuSign, an RFP Bidder must include with the completed Insert the certificate of completion that is automatically created in DocuSign after completing a document.

- DocuSign offers a 30-day trial. Please see the details here:  
<https://go.docusign.com/o/trial/?tgr=com-trial-hero>
- An individual can create a free DocuSign account to upload and sign documents as long as the account holder is the only signatory to these documents. A paid subscription is required if the documents require the signature of individuals other than the account holder.

If electing to complete an Insert with a digital signature created in Adobe Acrobat, the signatory must have a document signing Certificate in place to validate the digital signature.

If electing to complete an Insert with a digital signature created in Adobe Sign, an RFP Bidder must include with the completed Insert the Final Audit Report that is automatically created in Adobe Sign after completing a document:

- Adobe Sign offers a free trial. Please see the details here:  
<https://acrobat.adobe.com/us/en/sign/free-trial-global.html?trackingid=KLZWW>
- Various tutorials for using Adobe Sign can be found here:  
<https://helpx.adobe.com/sign/tutorials.html>
- Instructions for downloading the Final Audit Report can be found here:  
<https://helpx.adobe.com/sign/using/audit-reports-transaction-history.html>

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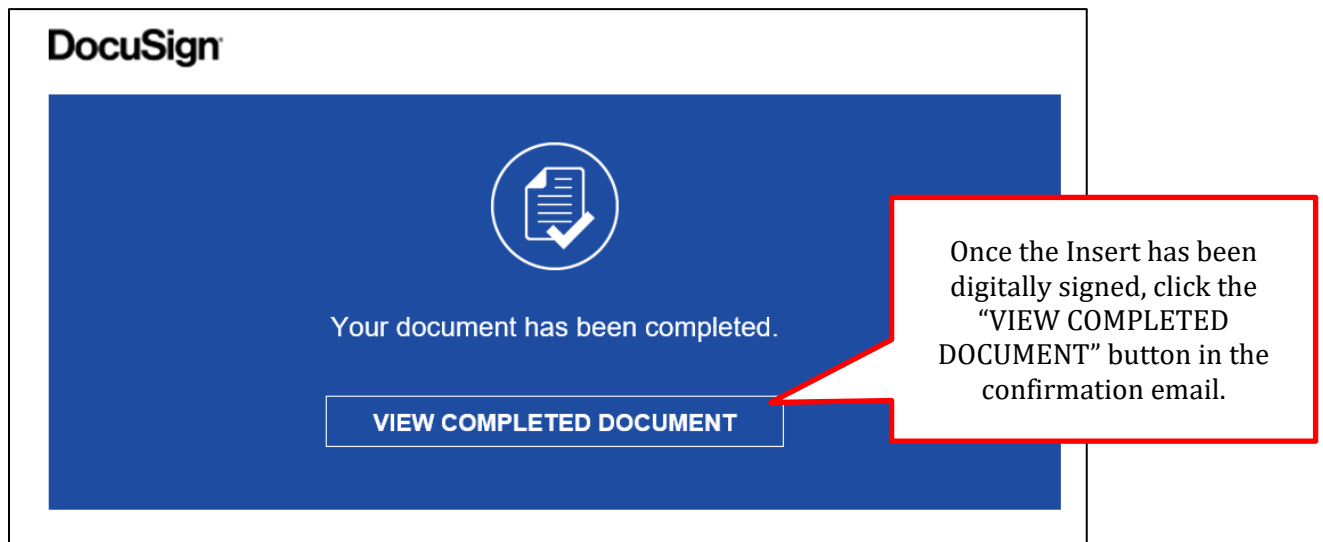
The remainder of this document provides screenshots and guidance to download the certificate of completion using DocuSign as well as using the document signing Certificate in Adobe Acrobat.

## [DOWNLOADING THE CERTIFICATE OF COMPLETION USING DOCUSIGN](#)

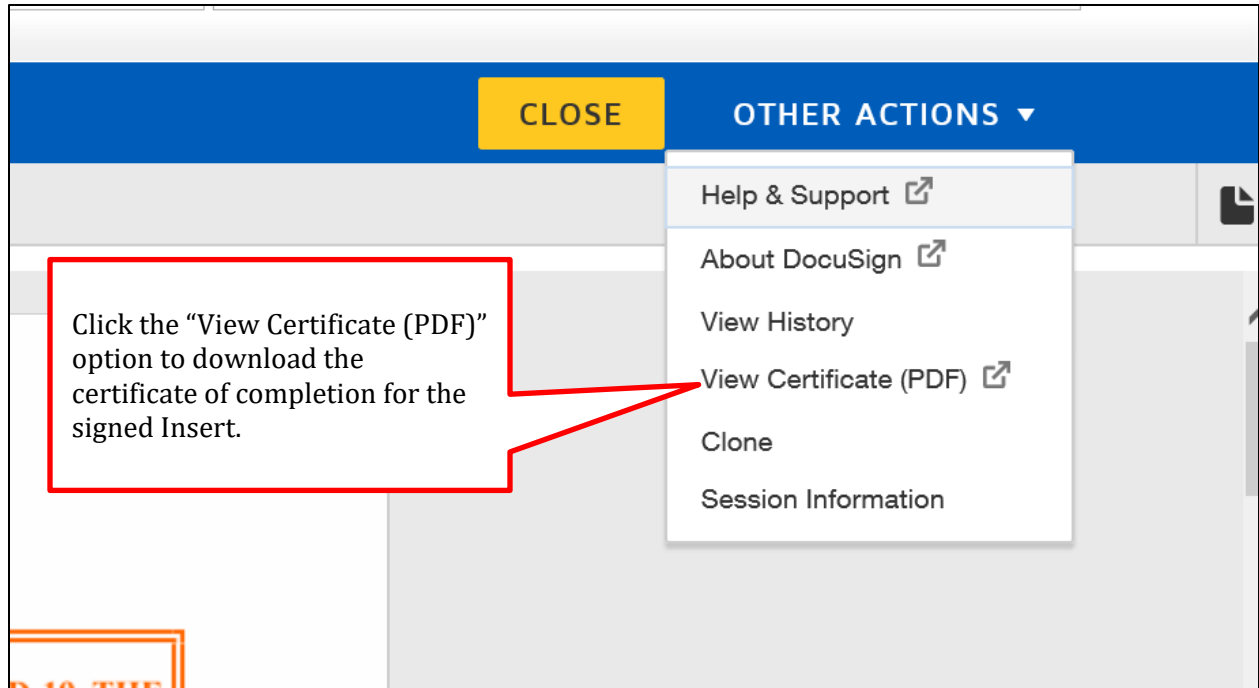
DocuSign provides instructions for uploading the Insert to be signed to its site and completing the digital signature process. Once the Insert is digitally signed, the sender (the individual who uploaded the Insert and prepared the “envelope” in DocuSign) as well as all signatories receive a copy of the signed document. The sender may also add individuals (other than the signatories) who will receive a copy of the signed document. Any individual receiving the signed document can follow the instructions below to download the certificate of completion via either: 1) the confirmation email generated by DocuSign, or 2) their own DocuSign account.

### **1. DOWNLOADING THE CERTIFICATE OF COMPLETION FROM EMAIL**

From the confirmation email, click the “VIEW COMPLETED DOCUMENT” button to be directed to a webpage to download the signed Insert, as shown below.



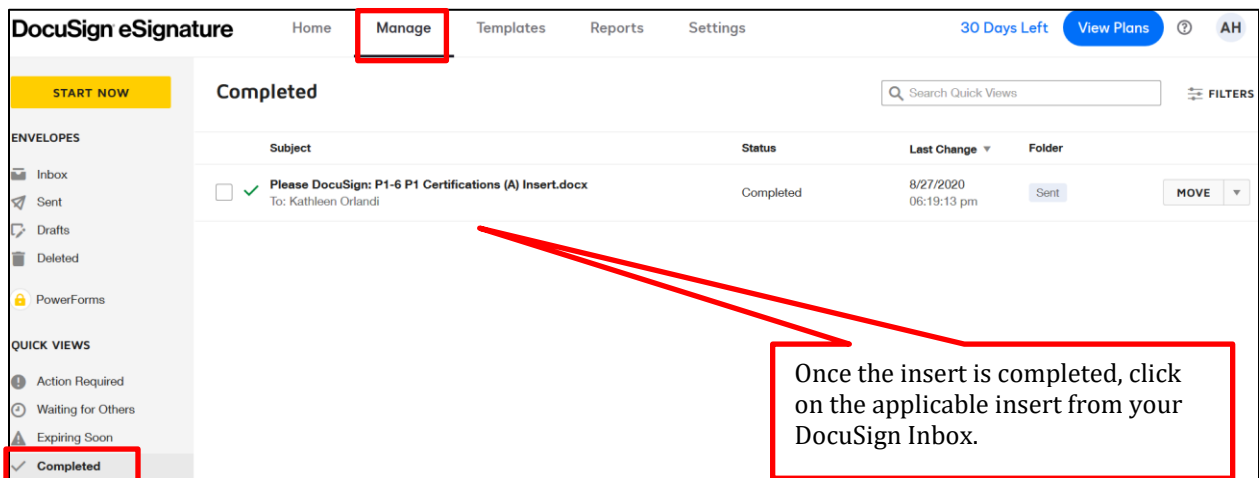
In the upper righthand corner of the webpage that opens, click the “OTHER ACTIONS” drop down menu, and select “View Certificate (PDF)” to download the certificate of completion. See screenshot on next page.



A sample digitally signed Insert and corresponding certificate of completion appear on pages 7-9 of this guide.

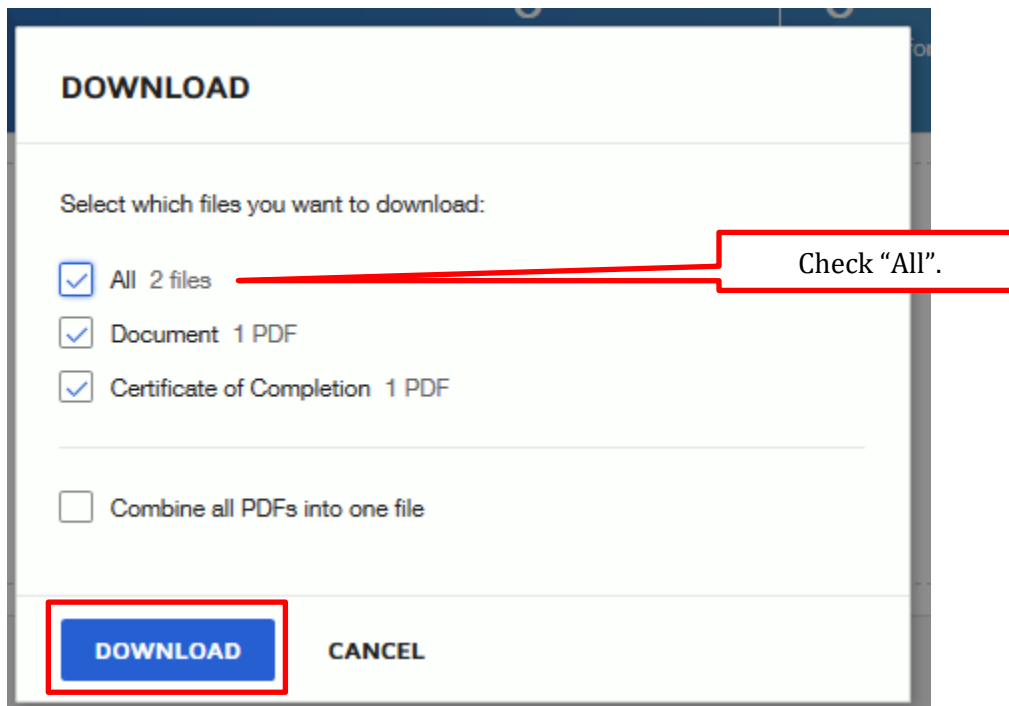
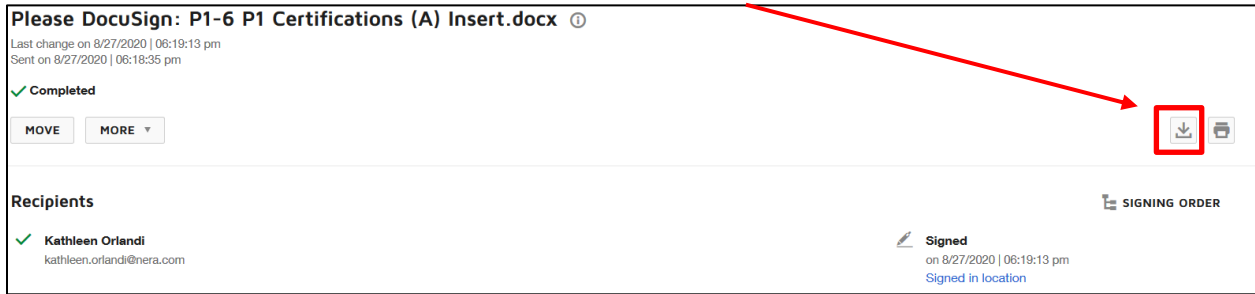
## 2. DOWNLOADING THE CERTIFICATE OF COMPLETION FROM A DOCUSIGN ACCOUNT

Log into a DocuSign account (<https://account.docusign.com/#/password>) and click on the Manage tab in the top navigation bar. Next, click on the Completed link at the bottom of the left-hand navigation bar.



## Digital Signatures Instructions

On the righthand side of the page click the download icon.



A sample digitally signed Insert and corresponding certificate of completion appear on the following pages of this guide.

**PECO DSP V**

**Bidder A, LLC**

*Name of RFP Bidder*

**THE INDEPENDENT EVALUATOR IS ACCEPTING A DIGITAL SIGNATURE OR A NOTARIZED SIGNATURE FOR THIS INSERT.**

This Insert may be completed as follows:

- *Signed by the Officer of the RFP Bidder with the signature notarized;*

*or:*

- *Submitted with a digital signature (using commercially available software such as DocuSign) with an accompanying document or information verifying the identity of the signatory. Digital signatures are not required to be notarized.*

This Insert and any accompanying document or information may be submitted as follows:

- *Uploaded to the online Part 1 Form;*

*or:*

- *Sent by email to the Independent Evaluator at [PECOProcurement@nera.com](mailto:PECOProcurement@nera.com).*

**P1 CERTIFICATIONS (A) INSERT (#P1-6)**

*(First Item in Section 4 of the Part 1 Form)*

**An RFP Bidder found to be acting in concert with another RFP Bidder may be disqualified by the Independent Evaluator.**

I certify that:

- (1) I am an officer, a director, or an individual otherwise authorized to undertake contracts (including the PECO Energy Company - Pennsylvania Default Service Supplier Master Agreement) and bind the RFP Bidder.
- (2) All information provided in this Part 1 Proposal is true and accurate to the best of my knowledge and belief.
- (3) If, for any reason or due to any circumstance, any information provided in this Part 1 Proposal changes or any previous certification fails to remain valid before the sixth business day after the Bid Date, I or the Representative will notify the Independent Evaluator of such changes as soon as practicable but in no event later than one (1) day before the Bid Date.
- (4) This Part 1 Proposal will remain valid and remain in full force and effect until six (6) business days after the Bid Date.

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DocuSign Envelope ID: C09D1654-4245-4743-A1FD-3D41F7AFB154

**PECO DSP V**

- (5) The RFP Bidder is not part of a bidding agreement, a joint venture for purposes of participating in any solicitation for this RFP, a bidding consortium, or any other type of agreement related to bidding in any solicitation of this RFP.

DocuSigned by:  
*Matt Pettit*  
47D36C6589F6481

\_\_\_\_\_  
Signature of the Officer of the RFP Bidder

\_\_\_\_\_  
Date

**Matt Pettit**  
Printed Name

\_\_\_\_\_  
Signature and Seal from Notary Public

\_\_\_\_\_  
Date





**Certificate Of Completion**

Envelope Id: C09D165442454743A1FD3D41F7AFB154 Status: Completed  
 Subject: Please DocuSign: P1-6 P1 Certifications (A) Insert.pdf  
 Source Envelope:  
 Document Pages: 2 Signatures: 1 Envelope Originator:  
 Certificate Pages: 1 Initials: 0 Matt Pettit  
 AutoNav: Enabled [Redacted]  
 Enveloped Stamping: Enabled  
 Time Zone: (UTC-08:00) Pacific Time (US & Canada)


**Record Tracking**

Status: Original Holder: Matt Pettit Location: DocuSign  
 7/22/2021 9:08:12 AM [Redacted]

**Signer Events**

Matt Pettit  
 [Redacted]  
 NERA  
 Security Level: Email, Account Authentication (None)

**Signature**

DocuSigned by:  
  
 47D3C65589F9461...  
 Signature Adoption: Pre-selected Style  
 Using IP Address: [Redacted]

**Timestamp**

Sent: 7/22/2021 9:13:53 AM  
 Viewed: 7/22/2021 9:14:00 AM  
 Signed: 7/22/2021 9:14:20 AM  
 Freeform Signing

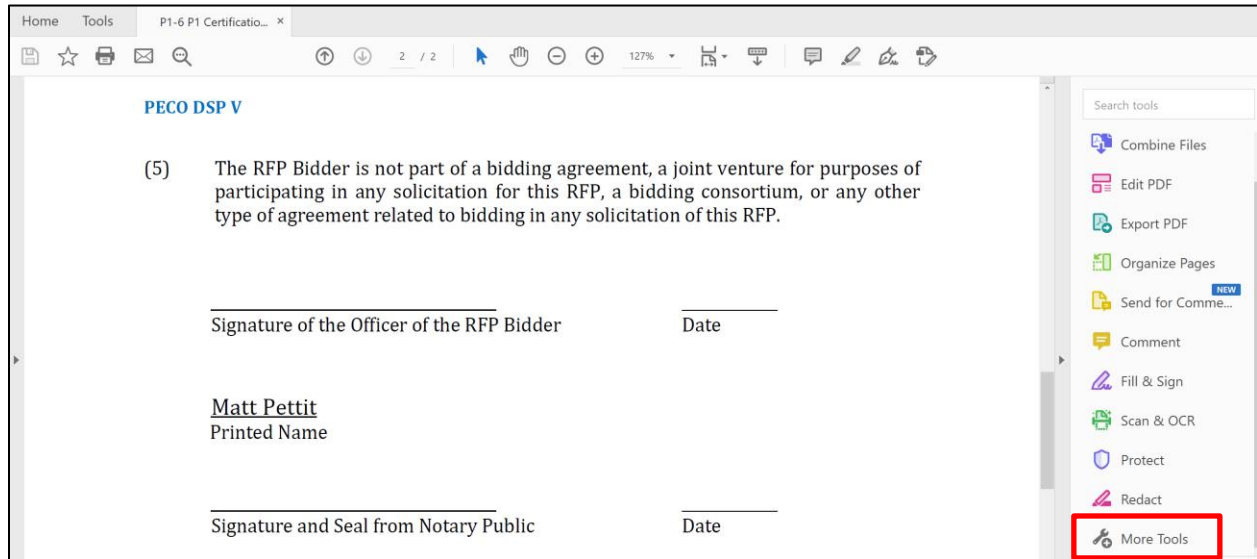
Electronic Record and Signature Disclosure:  
 Not Offered via DocuSign

In Person Signer Events	Signature	Timestamp
Editor Delivery Events	Status	Timestamp
Agent Delivery Events	Status	Timestamp
Intermediary Delivery Events	Status	Timestamp
Certified Delivery Events	Status	Timestamp
Carbon Copy Events	Status	Timestamp
Witness Events	Signature	Timestamp
Notary Events	Signature	Timestamp
Envelope Summary Events	Status	Timestamps
Envelope Sent	Hashed/Encrypted	7/22/2021 9:13:53 AM
Certified Delivered	Security Checked	7/22/2021 9:14:00 AM
Signing Complete	Security Checked	7/22/2021 9:14:20 AM
Completed	Security Checked	7/22/2021 9:14:20 AM
Payment Events	Status	Timestamps

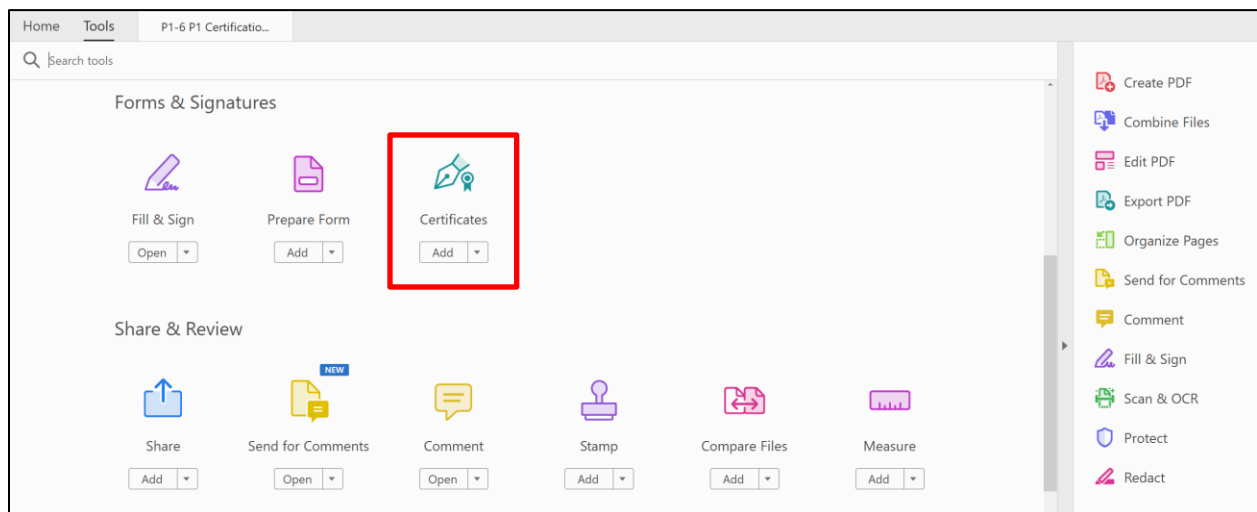
## USING A DOCUMENT SIGNING CERTIFICATE IN ADOBE ACROBAT

**NOTE: This section outlines the steps to Certify and apply a digital signature using a document signing Certificate purchased through a certificate authority that is compatible with Adobe Acrobat. This example is not related to the software Adobe Sign.**

Convert the Insert to a pdf file and open this file with Adobe Acrobat. Click on “More Tools” on the menu bar.



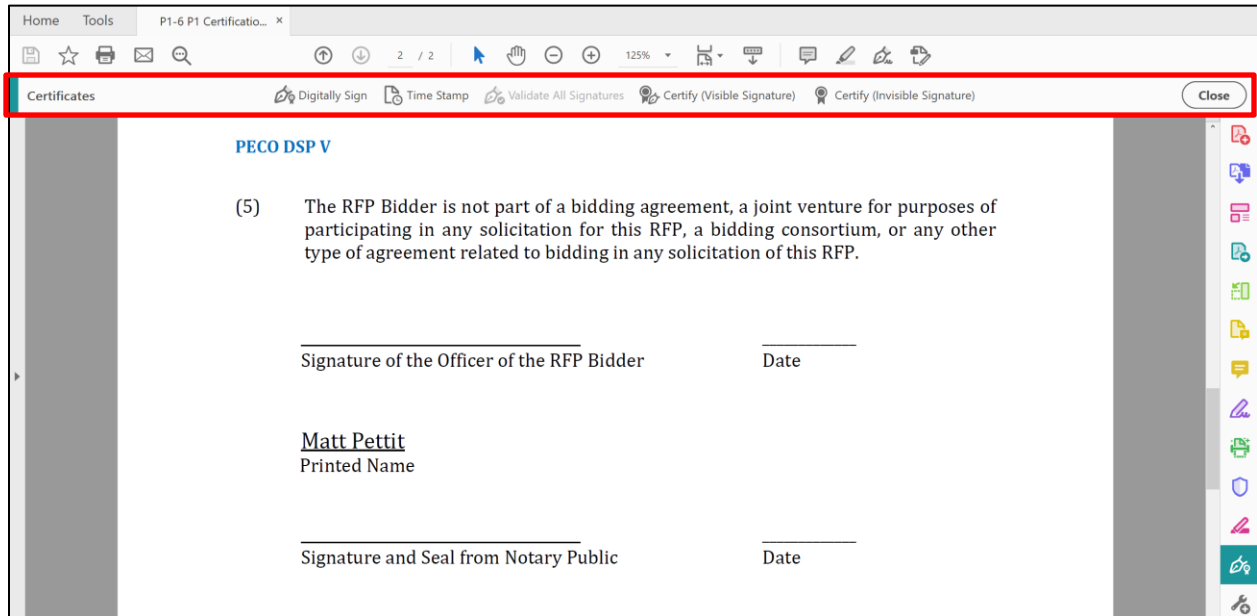
Next, click on the “Certificates” Icon under the header Forms & Signatures.



## Digital Signatures Instructions

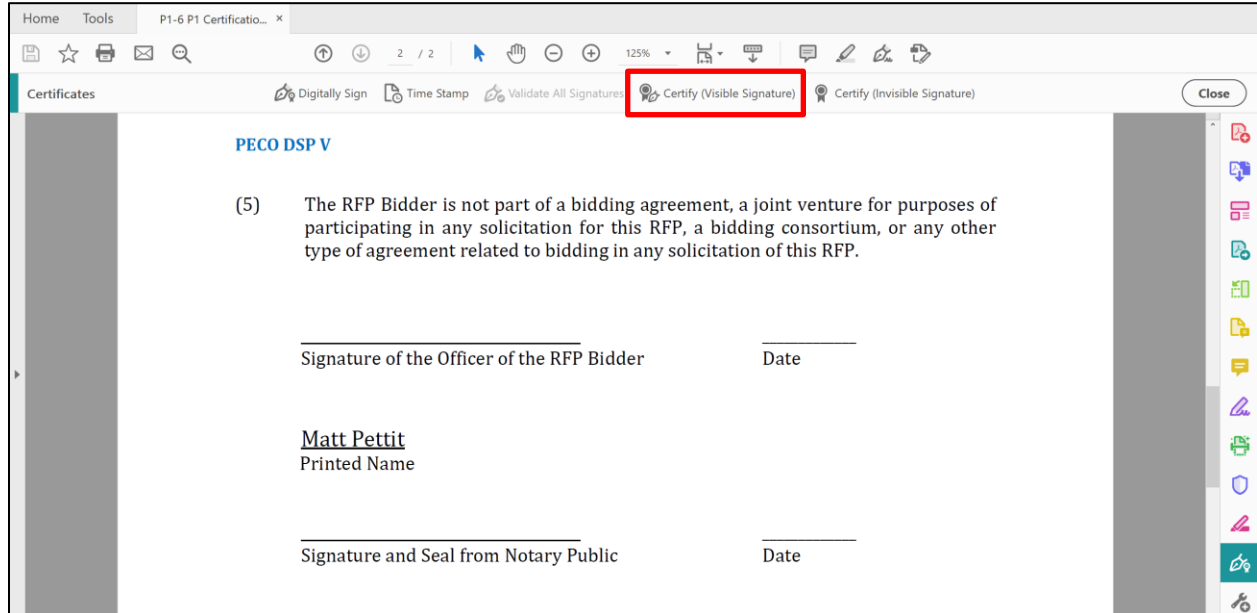
Locate the Certificates banner at the top of the Insert.

- If you see the option “Certify (Visible Signature)”, then you are able to Certify and apply a digital signature using a document signing Certificate using Adobe Acrobat.
- If you do not see the option “Certify (Visible Signature)”, you must first purchase a document signing Certificate that is compatible with Adobe Acrobat before you can validate the digital signature in Adobe Acrobat. Please see the link provided below for vendors approved by Adobe. The Independent Evaluator is not aware of a free-trial option for these vendors.  
<https://helpx.adobe.com/acrobat/kb/certified-document-services.html>



## Digital Signatures Instructions

Click the option to “Certify (Visible Signature)” and complete the digital signature process.



Once completed, you will see a banner at the top of the digitally signed Insert with the additional information that the signature has been certified as shown below.

