

Roles:

Sender – Accounts Payable (AP)

- Prepares and sends invoices to Workflow Owner via DocuSign

Workflow Owner – Post-Award Analysts/Financial Analysts

- Receives invoices from AP and designates approver and any other department-related workflow

Approver(s) – Principal Investigator (PI) or delegate

- Approves and signs invoice

Reviewer(s) – other staff

- Anyone designated by the workflow owner to receive a copy of an invoice

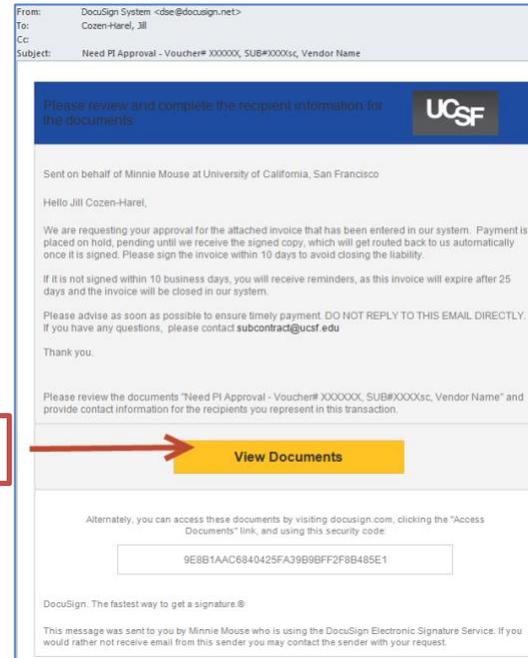
**Note that all receive an email with a link to the signed, completed invoice*

Two Ways to Access DocuSign:

Via Email Notification

1. Workflow Owners and Approvers will receive email notifications when they have an action to take in DocuSign. The recipient (regardless of role) will click on the **View Documents** link in the email. **Approvers** will be directed straight to the invoice when they are signing.

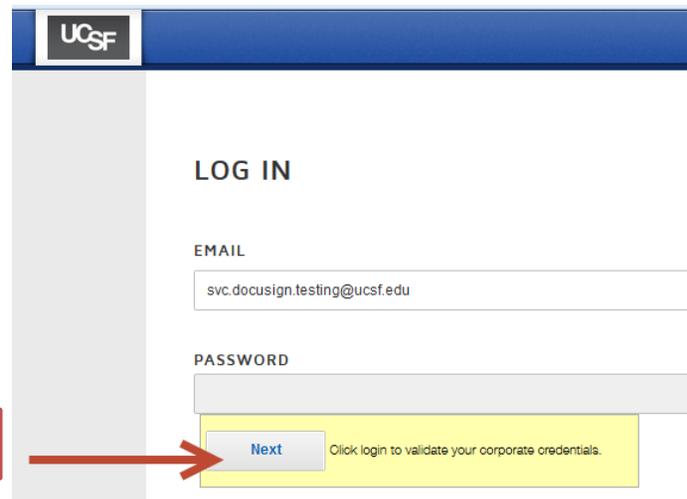
Step 1



Workflow owners will always need to log in, as described here. When **workflow owners, approvers, or reviewers** click through the email notification link to view a completed copy, they will always need to log in through MyAccess.

2. If you are required to log in, you will be directed to the DocuSign login screen. **Click Next** to continue. *Note: You may need to click in the **PASSWORD** field if the Next button is not visible.

Step 2



3. If not already logged into MyAccess, you will be redirected and asked to log in. Once you log into MyAccess, you will then be directed to your DocuSign home screen.

Step 3

MyAccess Login

Username

[User Name Options...](#)

Password

Remember me

Login

Please Note

- Remember to log out if you are on a public or shared computer.
- Only enter your MyAccess ID and Password if the URL for this site reads **dp.ucsf.edu**.

[MyAccess Overview...](#)

Via MyAccess

When logging in directly from MyAccess, select **DocuSign – UCSF** from the list of applications.

☆	DMPTool	The DMPTool (Data Mana data management plans t
★	DocuSign - UCSF	DocuSign is an electronic please submit a ServiceN business process to a Do
☆	DOM OAS (CPWF)	VPN required when acce
☆	E*Value	Educational Evaluation ar

More information is available on the [Supply Chain Management website](#).

To set up your electronic signature, see the “DocuSign – Setting up your DocuSign Signature” job aid.