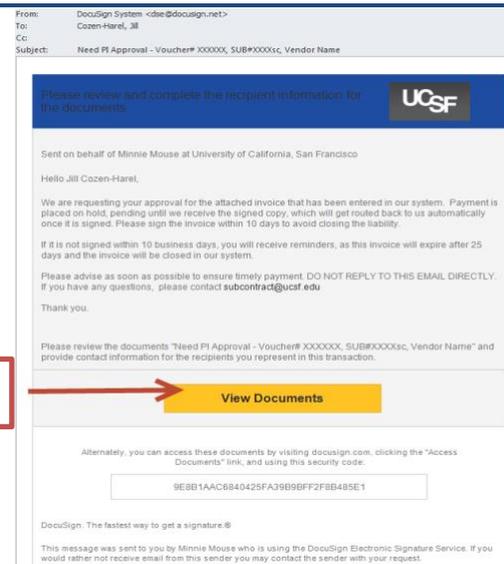


**When a subcontract invoice is ready for you to assign workflow, you will receive an email from DocuSign with this subject line: Need PI Approval - Voucher# (XXXXXXXX), SUB# (XXXX)sc, (Vendor Name).**

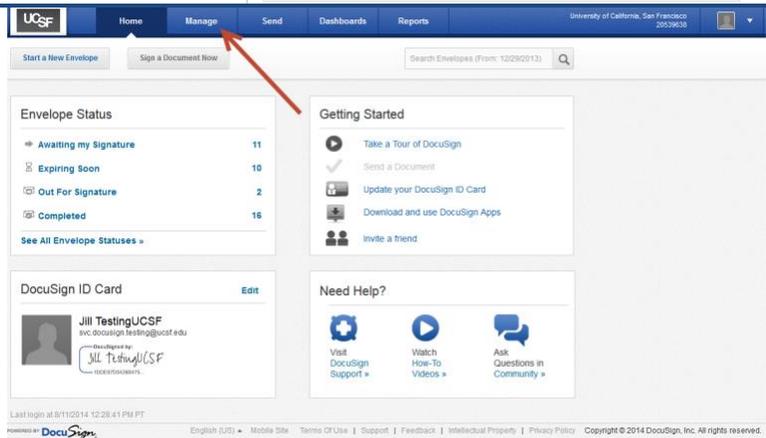
**To assign a single approver**

1. Click on the **View Documents** link in email notification.
2. Log in to DocuSign via MyAccess.



Step 2 – not shown

3. Select the **Manage** tab from the DocuSign home screen.

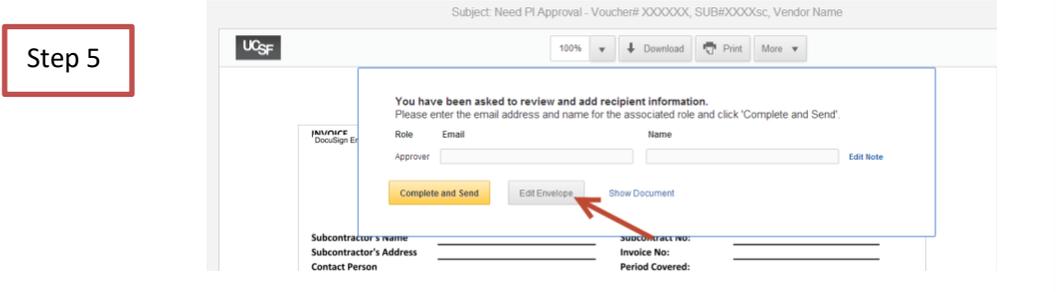


4. Double-click on the invoice that needs to have an approval workflow assigned.

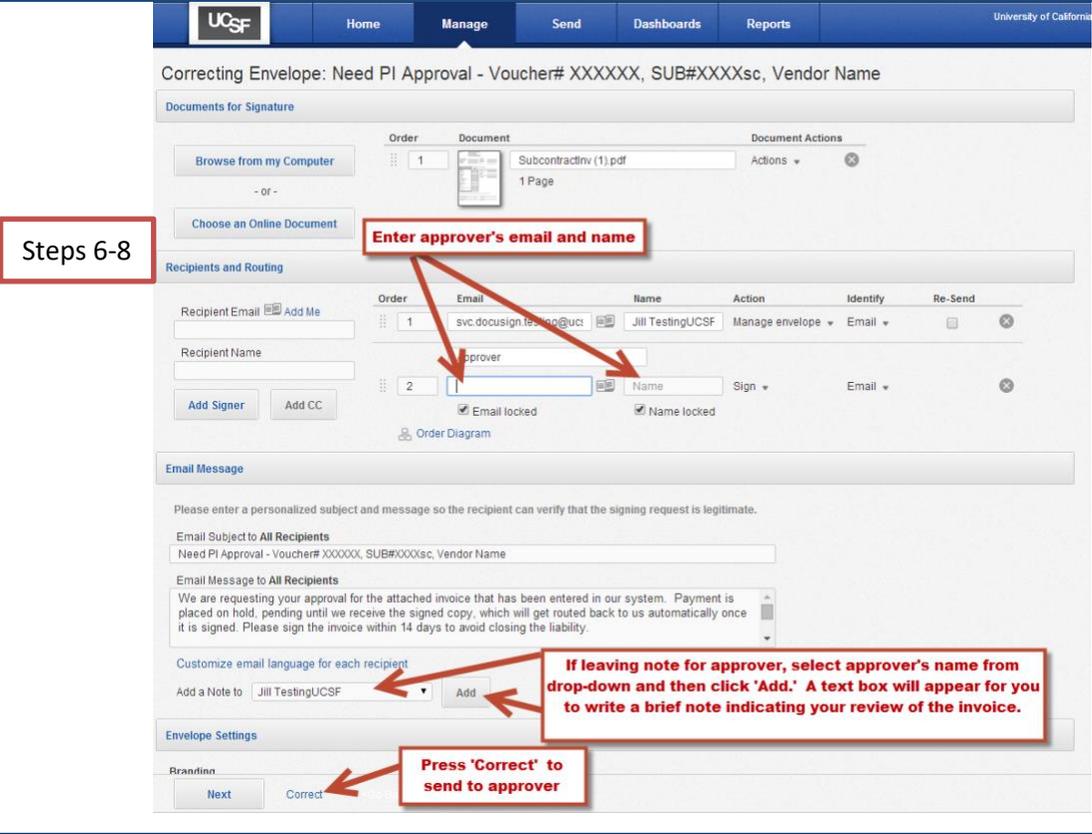


# Workflow Owner Subcontract Invoice Steps in DocuSign

5. When the pop-up appears, click on **Edit Envelope**.



- 6. Enter the approver's email and name.
- 7. Leave a note for the approver, if that is part of your workflow.
- 8. Click **Correct** to send to approver.



## To Add Additional Approver(s) or Reviewers (red = approver; teal = reviewer)

1. Enter first approver's name and email to assign a single approver.
2. Then enter the additional approver or reviewer's email address.
3. Enter additional approver or reviewer's name.
4. Press **Add signer** for an additional approver or press **add cc** for a reviewer. This will add them to the routing order. The default is for both approvers or the approver and the reviewer to receive the invoice simultaneously. To change the routing order, drag and drop the row to its new place in the order or change the number for that recipient in the order column.
5. Press **Correct** if reviewer. This will complete the sending.

## Steps 6-10 are only for adding an approver.

6. If adding an approver, press **Next**.
7. Drag the **Signature** icon to below the signature tag already on the invoice.
8. Drag the **Full name** icon to below the full name tag already on the invoice.
9. Drag the **Date Signed** icon to below the full name tag already on the invoice.
10. Press **Correct** to send.

The screenshot displays the DocuSign interface for a 'Correcting Envelope'. The top navigation bar includes 'UCSF', 'Home', 'Manage', 'Send', 'Dashboards', and 'Reports'. The main content area is titled 'Correcting Envelope: Need PI Approval - Voucher# XXXXXX, SUB#XXXXsc, Vendor Name'. It shows 'Documents for Signature' with a table of documents, 'Recipients and Routing' with a table of recipients, and 'Email Message' with 'Next', 'Correct', and 'Discard Changes' buttons. Red arrows labeled 'Step 2' through 'Step 6' point to various elements in the 'Recipients and Routing' section. A second screenshot below shows the 'Tag for:' section with a list of tags and a 'Sign Here' button. Red arrows labeled 'Step 7' through 'Step 10' point to specific tags and the 'Sign Here' button.

Order	Document	Document Actions
1	SubcontractInv (1).pdf 1 Page	Actions

Order	Email	Name	Action	Identify	Re-Send
1	ucsfdocusigntest@gmail.c	DocuSign TestGr	Manage envelope	Email	
2	ucsfdstest3com@gmail.		Sign	Email	

Tag for:

- Harry Potter [ucsfdstest4@gmail.com]
- Minnie Mouse [ucsfdstest2@gmail.com]

Standards: Signature, Optional Signature, Initial, Optional Initial, Signer Attachment, Full Name, First Name, Last Name, Email Address, Company, Title, Date Signed, Approve, Decline

Sign Here

Correct Preview <Go Back Discard Changes

### To Track Status of Invoice

When an invoice is signed by all approver(s), you will receive an email notification with a link to the signed invoice. You will receive a similar notification if the approver declines to sign.

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