

Workflow Owner Subcontract Invoice Steps in DocuSign



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5. When the pop-up appears, click on Edit Envelope .		Subject: Need PI Approval - Voucher# XXXXXX, SUB#XXXXXsc, Vendor Name
	Step 5	5
		You have been asked to review and add recipient information. Please enter the email address and name for the associated role and click 'Complete and Send'. Nonvert Booding E Approver Complete and Send Edit Enviroper Subcontractor's Address Subcontractor's Address Period Covered:
6. Enter the approver's email and name.		Home Manage Send Dashboards Reports University of California
7. Leave a note for the approver, if that is part of your		Correcting Envelope: Need PI Approval - Voucher# XXXXXX, SUB#XXXXsc, Vendor Name
workflow.		Documents for Signature
8. Click Correct to send to approver.		Order Document Document Actions Browse from my Computer I Subcontracting /1) off Actions =
		-or-
		Choose an Online Document Enter approver's email and name
	Steps 6-8	Recipients and Routing
		Recipient Email 🗐 Add Me Order Email Name Action Identify Re-Send
		Recipient Name pprover
		Add Signer Add CC
		Crider Diagram
		Email Message
		Please enter a personalized subject and message so the recipient can verify that the signing request is legitimate.
		Email subject to Ail Necipients Need PI Approval - Voucher# XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX
		Email Message to All Recipients We are requesting your approval for the attached invoice that has been entered in our system. Payment is placed on hold, pending until we receive the signed copy, which will get routed back to us automatically once it is signed. Please sign the invoice within 14 days to avoid closing the liability.
		Customize email language for each recipient If leaving note for approver, select approver's name from
		Add a Note to Jill TestingUCSF Add Add a Note to Jill TestingUCSF Add to write a brief note indicating your review of the invoice.
		Envelope Settings
		Brandline Press 'Correct' to send to approver

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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.

UCSF	Home	Manage	Send	Dashboards	Reports		Unive	rsity
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ecipients and Routing	Step 2							
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Standa Step 7	IOTAL	EXPENSE REQUES	POR THIS INVOICE	-				
Signature	I certify	that all expenditures	reported are for app	ropriate purposes and in	accordance with the te	rms and condition	is of the contract	
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Optional Initial	j N.							
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Full Name +	Authoriz	ed Subcontractor Sign	lature	Date	Print Nam	e and The		
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Title Control	Sub-	Step 10						
Title Ca Date Signed Ca Approve Step 9 Decline Correct	B Sub Preview <	Step 10	rd 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

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