Review and Approve (sign) an Invoice
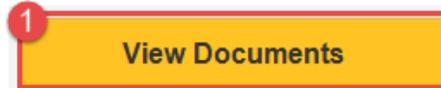
1. Click the "View Documents" link in the email you received from the DocuSign system

View Documents

2. Log on (not shown), if necessary, by clicking the "Next" button. (If the "Next" button is not visible on DocuSign login screen, make sure your UCSF email address is in the EMAIL field, and then click inside the PASSWORD field. This should activate the "Next" button.)

3. Click the "Review Document" link

Request for Signature
From: Jill Cozen-Harel
University of California, San Francisco
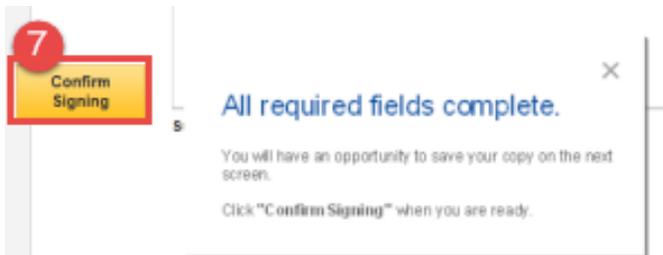Documents (1): Subcontractinv (1).pdf

4. Review the invoice completely before signing. If you wish to decline the invoice for a valid reason, see the "Decline an Invoice" instructions to the right. →

5. Click on the yellow "Sign Here" tab
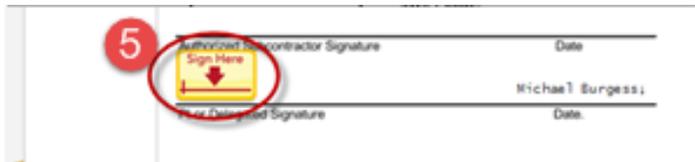
6. **If this is your first time signing,** follow the instructions on the reverse of this quick start guide entitled "Adopt and Sign (first time Approvers)." Note this is only necessary the first time you approve (sign) an invoice.

7. Click the "Confirm Signing" button to complete your signature and approval of the invoice.

- The invoice is now approved

All required fields complete.

You will have an opportunity to save your copy on the next screen.

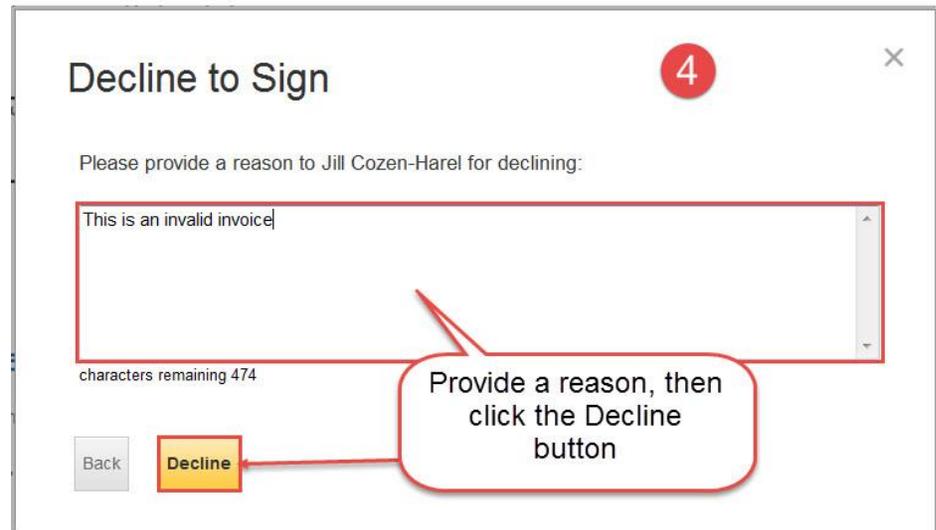Click "Confirm Signing" when you are ready.

Decline an Invoice

1. Follow steps 1-3 in the "Review and Approve an Invoice" column to the left

2. Click the "More" drop-down menu in the upper right of the invoice view.

Print   More ▼
View History
View Certificate
Change Signer
Decline
Finish Later
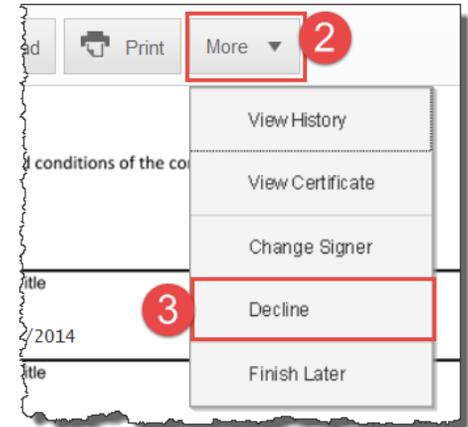
3. Choose "Decline" from the drop-down menu

4. Fill in a reason for declining and then click the "Decline" button

Decline to Sign

Please provide a reason to Jill Cozen-Harel for declining:

This is an invalid invoice

characters remaining 474

Back   Decline

Provide a reason, then click the Decline button
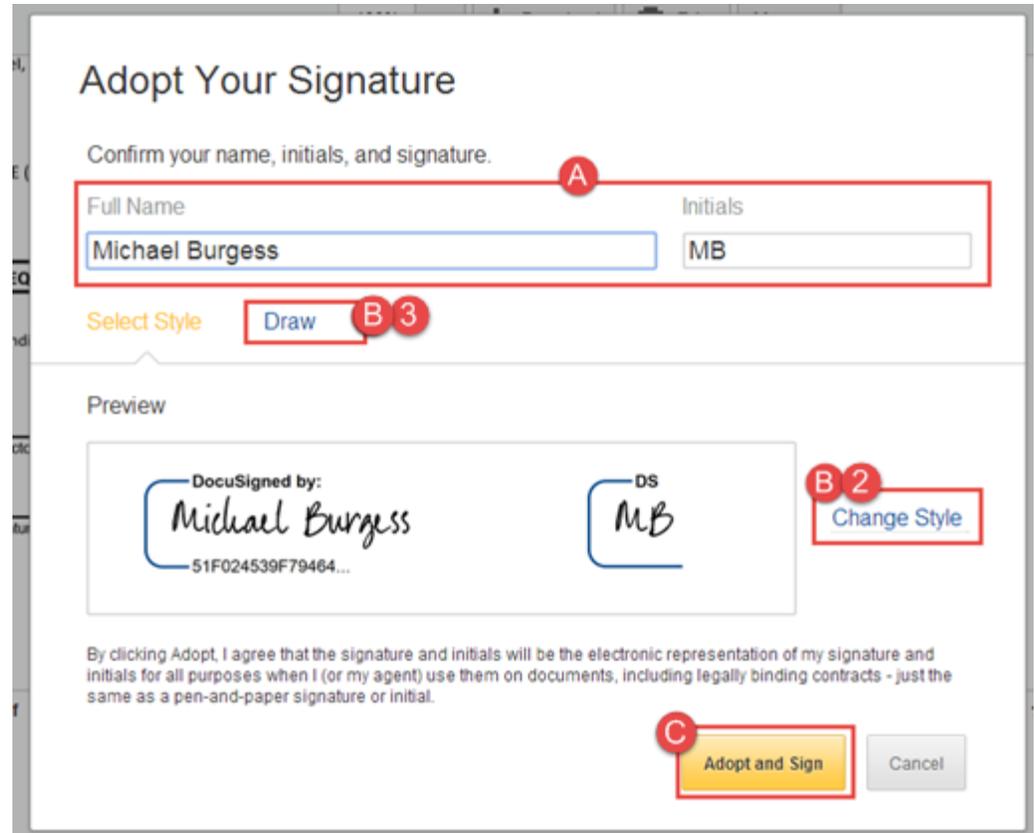
- The invoice is now declined

Adopt and Sign (First-Time Approvers)

A   Review and correct, if necessary, the format of your Full Name and Initials

B   You have three choices:

   1.   Accept the default and skip to step C
   2.   Click "Change Style" to select a different predefined signature style
   3.   Click the "Draw" link to draw your own signature using the mouse

   4.   ***Note**: Your "signature" in DocuSign does not need to resemble your actual signature. To save time, use the default style.*

      If desired, you can change your "signature" style at a later time.

C   When satisfied, click the "Adopt and Sign" button

D   (Not shown) Go back to step 7 in the "Review and Approve an Invoice" (on the reverse) to finalize your first signature using DocuSign

Your signature is now saved and available for future use

Adopt Your Signature

Confirm your name, initials, and signature.

Full Name — Michael Burgess
Initials — MB

Select Style   Draw

Preview

DocuSigned by: Michael Burgess
51F024539F79464...

DS MB

Change Style

By clicking Adopt, I agree that the signature and initials will be the electronic representation of my signature and initials for all purposes when I (or my agent) use them on documents, including legally binding contracts - just the same as a pen-and-paper signature or initial.

Adopt and Sign   Cancel

For more information on Subcontract Invoices and DocuSign, see the [Supply Chain Management website](https://supplychain.ucsf.edu).