DocuSign Approver (PI) User Guide

Topics:

- Approving an invoice
- Declining to sign invoice
- Routing to a different approver
- Receiving completion notice with link to signed invoice
- Out of office sharing DocuSign folders

Topic 1: Approving an Invoice

- 1. Click on link in email to open invoice.
- 2. Click on **Review Document**. Click checkbox if you don't want to see pop-up in the future.

		100%	Download	🖶 Print	More 💌		
INIVOICE DocuSign Envelope	ID: ACAE5100-5837-430 Accour San Fra	gents of the University of Ci IF-A891-D07DF1C81228 Iting Office, Box 0812 Incisco, CA 94143-0812	alifornia				Î
	Request	for Signature				•	r
Subcontracto Subcontracto Contact Perso Email Addres Telephone #	From:	Jill Coze	e n-Harel of California, San	Francisco		_	
	Documents (1): Subcontractinv (1).pdf			_	
ITEM Personnel Cost Salaries Bonofite	Review Do	Decline	Finish Later C	hange Signer			
TOTAL PERSON		optional	> ch	eck here to skij	o this information in	n the future	
Operating Cost Consultants Equipment Supplies			IBAN: (European cour BSB (Australia):	ntries & Israel)			

- 3. Review invoice.
- 4. Click on yellow Sign Here tab.

	PROGRAM INCOME (entered as a credit of TOTAL NET COST		
Next	TOTAL EXPENSE REQUEST FOR THIS INVOICE		
	I certify that all expenditures reported are for appr	opriate purposes and in accord	ance with the terms and conditions of the contract.
	Authorized Subcontractor Signature	Date	Print Name and Title
		Minnie Mouse	4/17/2014
	PI or Delegated Signature	Date.	Print Name and Title
	Subcontractiny (1) pdf		

Create signature (first time only)
 *see Quick Guide – Setting up Signature for more details.

Adopt You	ır Signature		
CO _% Confirm your nar	me, initials, and signature		
Full Name	Option 1: If yo	initials	
N Bob Builder	unaw your s	BB	
Select Style	Draw	Ontion 2: If	
<u> </u>		want to pick	ka
Preview		different fo	nt
DocuSie	aned by:	DS	1
ar Bob E	Builder	BB	Change Style
2052A4	04409F412		
By clicking Adopt, I ag for all purposes when I pen-and-paper signatur	ree that the signature and initials w (or my agent) use them on docum e or initial	vill be the electronic representation of ents, including legally binding contra	f my signature and initials cts - just the same as a
pon one poper orginator			

6. Click on **Confirm Signing.** (You must click the yellow **Confirm Signing** tag to finish the task).

Confirm Signing	PROGRAM INCOME (entered as a credit of All required fields complet	× te.		
	Authorized Subcontractor Signature	Date	in accordance with the terms and conditions of the contract. Print Name and Title	_
	ProPoilegimed Signature	Date.	Print Name and Title	-

Topic 2: Declining to sign invoice

- 1. Click on link in email to open invoice (not shown).
- 2. Click on **Review Document**. Click checkbox if you don't want to see pop-up in the future.

		100%	•	Download	🖶 Print	More 🔻		
DocuSign Envelope	ID: ACAE5100-5837-43DF-AA9 Accounting of San Francisco	of the University of 1-D07DF1C81228 Dffice, Box 0812 o, CA 94143-0812	f Califo	ornia				
Subcontracto	Request for	Signatur	e				÷	H
Subcontracto Subcontracto Contact Perso Email Addres Telephone #	From:	Jill Co Universi	zen- ty of (-Harel California, San	Francisco			
	Documents (1):	Subcontractinv	(1).pc	lf				
ITEM Personnel Cost Salaries	Review Docume	nt Decline	Fir	nish Later C	hange Signer			
Benefits TOTAL PERSON		optional		> Che	eck here to ski	p this inform	ation in the future	
Consultants Equipment Supplies				IBAN: (European cour BSB (Australia):	tries & Israel)			

- 3. Review invoice.
- 4. Press **More** and then select **Decline**.

Subject: Need PI Approval - Voucher	# XXXXXX, SUB#XXXXsc, Vendor Name
INVOICE DocuSign Envelope ID: 9CFE8A41-645A-4F66-8889-949D62860ECA Accounting Office, Box 0812 San Francisco, CA 94143-0812 Attn: Accounts Payable/Subcontracts Desk Tel. No: 415-476-2126; FAX #415-920-2503	View History View Certificate Change Signer
Subcontractor's Name Invo Subcontractor's Address Invo Contact Person Peri Email Address Date Telephone # Fina	ice No: Finish Later od Covered:

*Enter a reason for declining and then click **Decline.**

Subject: Need PI Approval - Voucher# XXXXXX, SUB#XXXXsc, Vendor Nar	ne
Decline to Sign	×
Step 1	
ne	
Step 2 acters remaining 500	
Back Decline	



Topic 3: Routing to a different approver

If, for some reason, you received an invoice to sign, but you are not the appropriate person to sign it and you know who should sign it instead, you can designate another approver instead of yourself.

1. Select Change Signer.

Envelope ID:	SBBUUZCE+7654A1E-9826+9801146AAA Accounting Office, Box 0812 San Francisco, CA 94143-0812 Attn: Accounts Payable/Subcontracts Desk Tel. No: 415-476-2126; FAX #415-920-2503
ractor's ractor's Person	Request for Signature
ldress ne #	From: Jill Cozen-Harel University of California, San Francisco
	Documents (1): Subcontractinv (1).pdf
<u>I Costs</u> s ts RSONNE	Review Document Decline Finish Later Change Signer
<u>z Costs</u> tants nent 25	Check here to skip this information in the future
t Care ions/Renova	CLABE (Mexico):

2. In the pop-up Change Signer window, enter the name and email of the new signer as well as a reason for why you are making this change. This reason will be sent back to Accounts Payable (AP). After clicking **Change Signer**, you will become a cc recipient on this envelope and the new approver will receive a notification that you designated him or her as the new signer.

Change Signer	
mail Address for the New Signer	* = Required
Name*	
Please provide a reason to Jill Cozen-Harel for cha	anging signing responsibility:
×	
characters remaining 250	
	otification to the person to whom
Clicking the Change Signer button will send a no you assigned this envelope. The original sender wi will be added as a Carbon Copy (CC) recipient.	iii also receive a noulication. Fou
Clicking the Change Signer button will send a nu you assigned this envelope. The original sender wi will be added as a Carbon Copy (CC) recipient.	in also receive a nouncation. You

Topic 4: Receiving completion or declination notice with link to invoice

A. Completion – When the approver(s) have signed the invoice, all parties (AP, workflow owner (you), approver(s), and any reviewers) will receive an email notification that the signing process has been completed. The email will contain a link to the signed invoice, which can then be printed or downloaded as needed.

ocuSign S	ystem [dse@ sting	docusign.net]	on behalf of Jill	Monday, August	Act
Your docum	ent has been co	mpleted	UCg	F	
Jill Testing All parties h SUB#XXXX	CSF, ave completed th sc, Vendor Name	ne envelope 'Need e'.	PI Approval - Vouch	er# XXXXXX,	
To view, do	vnload or print th	e completed docur	nent click below.		
		w in DocuSign			
Alternately,	rou can access these do	ocuments by visiting docusig ink, and using this security of	n.com, clicking the "Access D code:	ocuments"	
	3B1E8EE8B7	7D45C299E09AAC	378FEC351		

You will be directed to the signed invoice.

	100% 🔻	🗜 Download 🖶 Print More 💌	×
Louismanna Louisment Supples Tranel Cave Tranel Cave Tranel Cave Tranel Core Cave Cav		www. ((uropean countries & Inrael) BSB (Australat): CLABE (Menico): with the terms and conditions of the contract. Price Name and Title	> Hide Subcon

B. **Declination –** If you decline to sign, all parties will receive a notice stating that you declined. Only AP will receive the reason that you listed for declining.



See below for AP's view:

Declined: Need PI Approval - Voucher# XXXXXX, SUB#XXXXsc, Vendor Name

DocuSign System <dse@docusign.net>

Sent: To:	Fri 4/18/2014 4:20 PM Cozen-Harel, Jill
	Envelope declined
	Sent on behalf of DocuSign Support
	DocuSign TestGmail has declined the envelope 'Need PI Approval - Voucher# XXXXXX, SUB#XXXXsc, Vendor Name' (ID:50136b95-39f0-4408-ace7-ae7b2a9510bf) for the following reasons:
(Wrong voucher number As a result, the envelope has been marked as declined and cannot be completed.
	To view the declined document, click below:
	View Documents

You, as the approver, and your post-award analyst/RSA will receive a notification such as this:

Envelope Declined	UC _{SF}
From:	Jill Cozen-Harel (jill.cozen-harel@ucsf.edu) University of California, San Francisco
Jill TestingUCSF,	
DocuSign TestGmail has declined the envelope 'Need PI Approval - Voucher# XXXXXX, SUB#XXXXsc, Vendor Name' (ID:178a5c8c-0b6d-4071-a37d- e2aa63382fed). As a result, the envelope has been marked as declined and cannot be completed.	
To view the declined document, click the link below:	
	View in DocuSign

Topic 5: Out of office – sharing DocuSign folders

DocuSign does not currently have a delegation feature. To preempt your being out of office for five business days or more, we ask that you submit a <u>ServiceNow ticket</u> with the name of the person who will be given access to your DocuSign folders. Ask that co-worker to check your folders every day or two while you are away.