DocuSign Subcontract Invoice Process

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.

Via MyAccess

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

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.