Review and Approve (sign) an Invoice

1. Click the “View Documents” link in the email you received from the DocuSign system.

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.

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.

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.

3. Choose “Decline” from the drop-down menu.

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

   • The invoice is now declined.

   Provide a reason, then click the Decline button.
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

For more information on Subcontract Invoices and DocuSign, see the Supply Chain Management website.