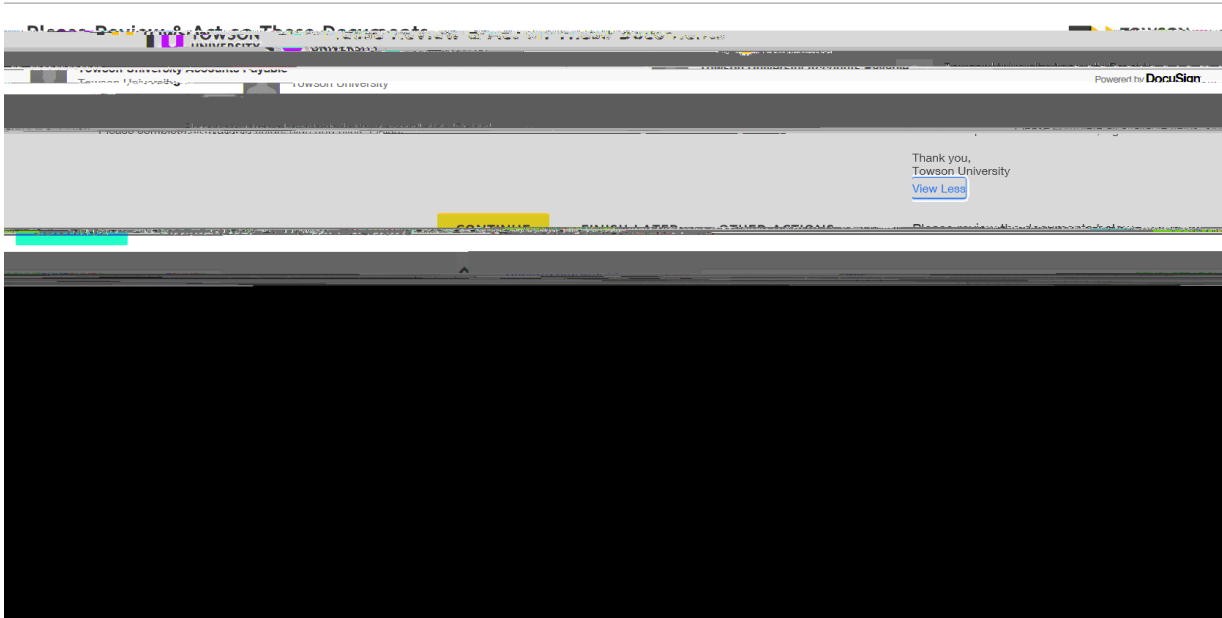Once the information on the initial DocuSign page is completed click on

When you click Begin Signing, the system will take you into DocuSign to begin filling in the form.

DocuSign may ask you to agree to their terms and conditions, click the check box to agree if it appears and click Continue.

You will now begin filling in the form.

In the drop down next to Reason for Payment, select the appropriate reason for payment. Then include a brief description in the Reason for Payment box. If the red attachment symbol is present, you will need to attach backup documentation, be sure to include all appropriate backup documentation. You are also required to attach the individual's completed W-9. If the W-9 is not completed properly or there is missing backup documentation, the form will be rejected by the AP office and a new form will need to be created.
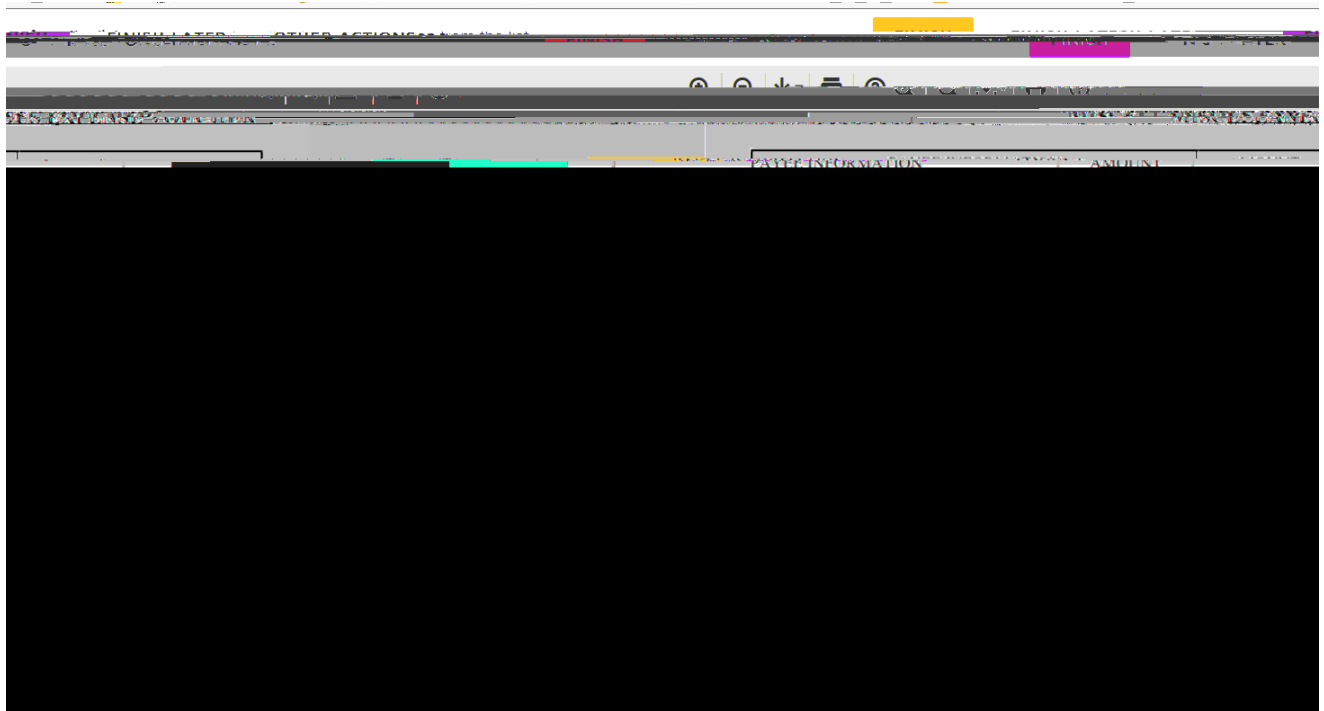
Attach all required back-up documentation for the purchase by clicking on the Required Attachment link and upload all of the back-up documentation. All uploaded documents will appear as additional pages as you scroll down through the document so you can review and make sure you upload all backup documentation.

You should review the form to make sure everything is correct, all backup documentation is attached and then click Finish. The next person in line is the 1st Department Approver, they will get an email to review and sign the document.
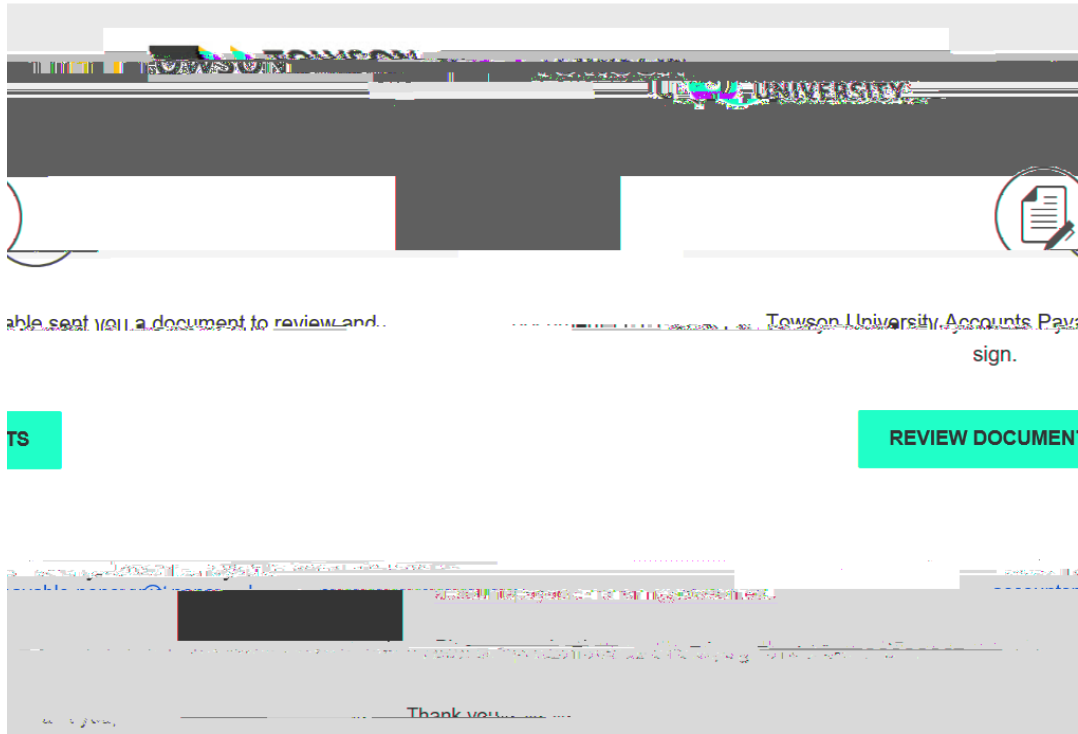
The individual in the 1st Approver role will complete the code block and sign as an approval on the form. It is important to make sure the correct account number is being listed because if a wrong account number is on the form, the AP office will have to reject the form and a new one will need to be created.

It is also important to make sure the total $ amount in the code block, matches the total $ amount at the top of the form, if the two amounts do not match, the form will be rejected by the AP office.