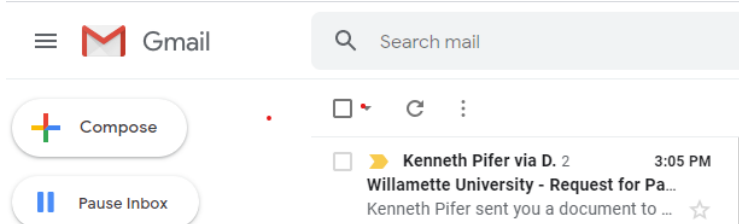


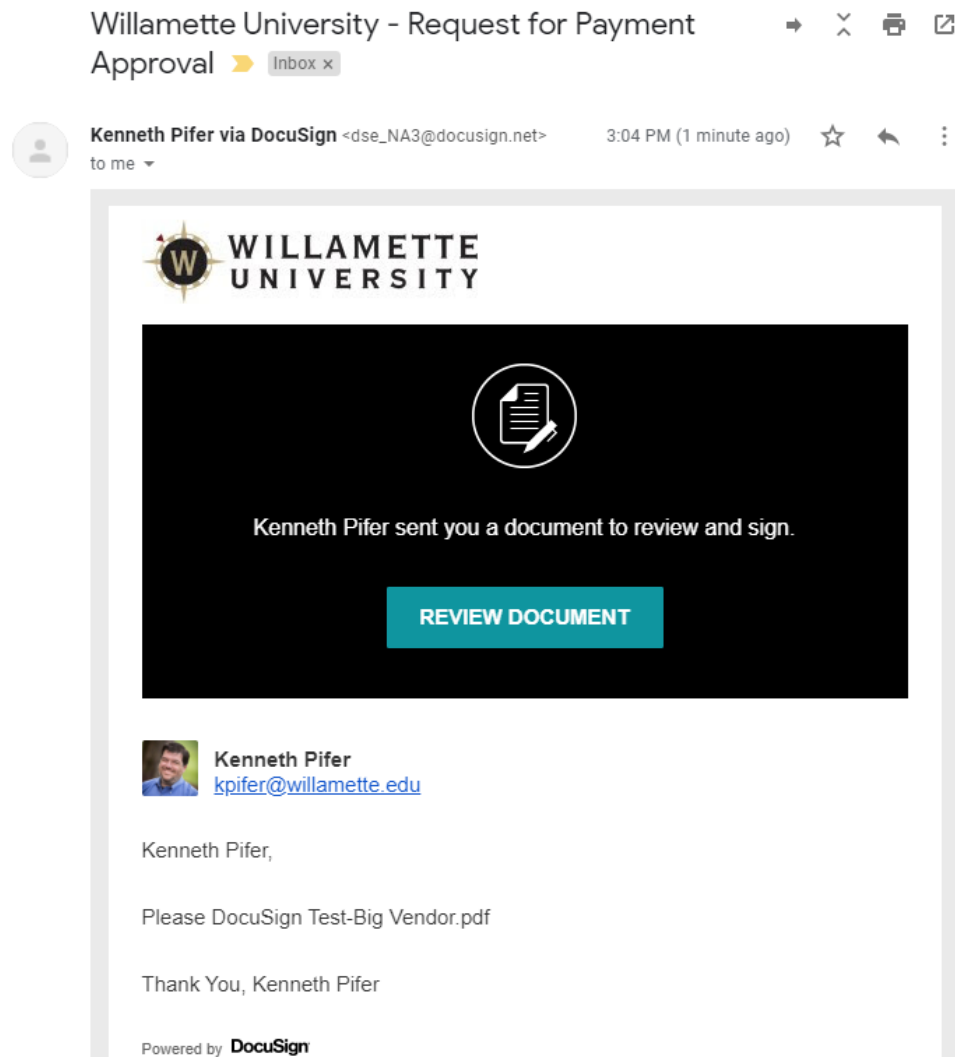
Willamette University will be using DocuSign as a platform for the submission and approval of request for payment documents, beginning on a temporary basis through the COVID-19 crisis. ***This job aid covers the approval of accounting documents, using a request for payment as an example.***

You will receive an email notification when you have a document that needs to be signed.



⇒ *Hint: Please note that you do not have to have a DocuSign account to approve accounting documents.*


The email will look like this:



Click the button labeled “Review Document” to open a window in DocuSign that will allow you to review and the document and supporting materials, and to sign the document indicating approval. Then click “Continue.”

This site uses cookies, some of which are required for the operation of the site. [Learn More](#) OK

Please Review & Act on These Documents

 **Kenneth Pifer**
Willamette University

WILLAMETTE UNIVERSITY
Powered by DocuSign

Thanks for your patience! This test includes delivery to A/P, so we can test both the approval process and the delivery process.
Thanks!
[View More](#)

Please review the documents below. CONTINUE OTHER ACTIONS ▾

ADDRESS	1234 State Street	10-60306-6010	50,000.00
	Salem, OR 97301		

DELIVERY INSTRUCTIONS:

- Direct Deposit (ACH)
- Wire Payment
- Mail Check
- Return check to University and hold for pick up
- CCR (Credit Card)
- ACH Direct Debit(Payroll&HR)

All Rush Requests must be received in Accounting by 8:30 A.M. with a Rush Request form. Controller's approval is required.

- Rush-ACH or standard mail delivery
- Rush-Overnighted Check. Department is responsible for UPS Fee.

TOTAL 50,000.00

GL Description (Briefly describe the purpose of the charge which will post to the General Ledger. Field is required.)

PAYMENT PURPOSE (Enter a detailed explanation of this payment that provides enough information to allow an approver or an auditor to understand).


Now, you will have a chance to review the request and supporting documents, and click on the “Sign” button when you are done.

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Please review the documents below. FINISH OTHER ACTIONS ▾

START

Vendor# 123456



WILLAMETTE UNIVERSITY

Request for Payment

DATE	<u>3/23/2020</u>	AMOUNT	<u>50,000.00</u>
PAYEE	<u>Big Vendor</u>	GL# DISTRIBUTION	PROJECT#
ADDRESS	<u>1234 State Street</u> <u>Salem, OR 97301</u>	<u>10-60506-6010</u>	<u>50,000.00</u>
DELIVERY INSTRUCTIONS:		TOTAL <u>50,000.00</u>	
<input checked="" type="checkbox"/> Direct Deposit (ACH) <input type="checkbox"/> Wire Payment <input type="checkbox"/> Mail Check <input type="checkbox"/> Return check to University and hold for pick up <input type="checkbox"/> CCR (Credit Card) <input type="checkbox"/> ACH Direct Debit(Payroll&HR)		All Rush Requests must be received in Accounting by 8:30 A.M. with a Rush Request form. Controller's approval is required. <input type="checkbox"/> Rush-ACH or standard mail delivery <input type="checkbox"/> Rush-Overnighted Check. Department is responsible for UPS Fee.	

GL Description <small>(Briefly describe the purpose of the charge which will post to the General Ledger. Field is limited to 25 characters.)</small> TEST	PAYMENT PURPOSE <small>(Enter a detailed explanation of this payment that provides enough information to allow an approver or an auditor to understand.)</small> TEST #1 - Docusign workflow with Dan
---	---

REQUIRED FOR ALL REQUESTS

REQUESTED BY: Printed Name: <u>Ken Pifer</u> Signature: _____ Date: <u>3/30/2020</u>	BUDGET OFFICER APPROVAL up to \$10,000: Printed Name: <u>Ken Pifer</u> Signature: _____ Date: <u>3/31/2020</u>
--	--

ADDITIONAL APPROVAL AS NEEDED

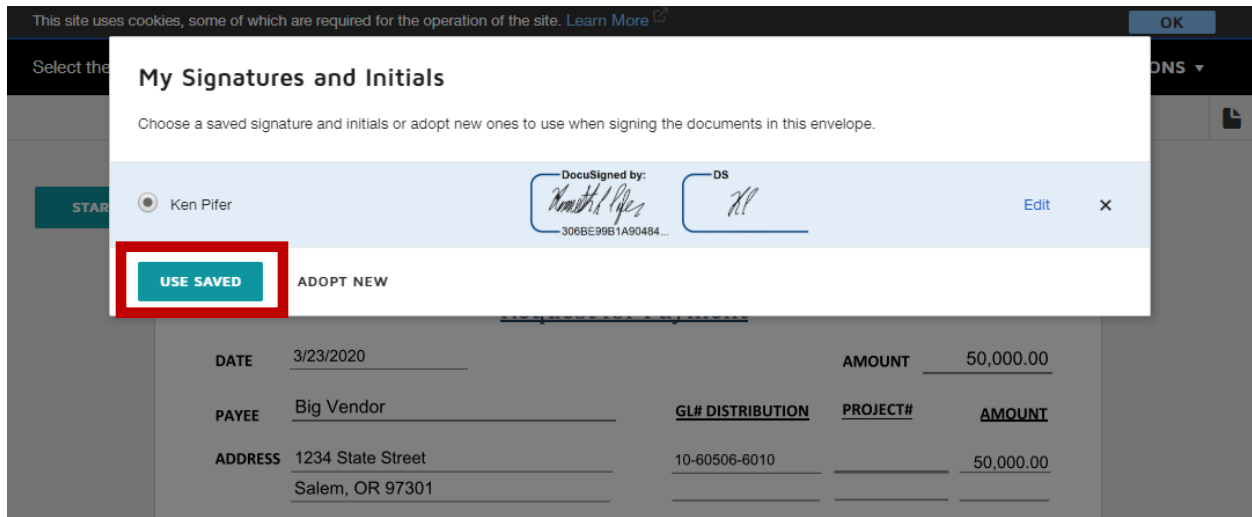
FISCAL OFFICER APPROVAL \$10,000-50,000: Printed Name: _____ Signature: _____ Date: _____	Sr. VP or VP of Division APPROVAL \$50,000 and above: <small>(Note: Payment Request between \$50,000-\$100,000 requires two signatures from VP or Dean. Payment Request above \$100,000 must be signed by the President or VP for Finance & Controller. Signature requirements must be completed before submitting to Accounting.)</small> Printed Names: _____ Signatures: _____ Dates: _____
---	---

Attach all original invoice(s). For new vendors, please submit the company's W-9 with ACH Payment Authorization form. Forms can be found in WU Portal under Forms tab or click [here](#).

Test-Big Vendor.pdf
1 of 1

⇒ Hint: There is not a “send it back” option, or an opportunity for questions. We are requestors to coordinate any questions/issues addressed with issuers prior to submission.


You will have an opportunity to verify or edit your signature.



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Select the **My Signatures and Initials**


Choose a saved signature and initials or adopt new ones to use when signing the documents in this envelope.

Ken Pifer DocuSigned by:  DS 306BE99B1A90484... Edit ×

USE SAVED ADOPT NEW

DATE	3/23/2020	AMOUNT	50,000.00
PAYEE	Big Vendor	GL# DISTRIBUTION	PROJECT#
ADDRESS	1234 State Street Salem, OR 97301	10-60506-6010	50,000.00

And once the signature is affixed to the document, you can click “Finish.”



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Done! Select Finish to send the completed document. FINISH OTHER ACTIONS

Vendor# 123456

WILLAMETTE UNIVERSITY
[Request for Payment](#)

DATE	3/23/2020	AMOUNT	50,000.00
PAYEE	Big Vendor	GL# DISTRIBUTION	PROJECT#
ADDRESS	1234 State Street Salem, OR 97301	10-60506-6010	50,000.00
		TOTAL	50,000.00

DELIVERY INSTRUCTIONS:

Direct Deposit (ACH) All Rush Requests must be received in Accounting by 8:30 A.M. with a Rush Request form. Controller's approval is required.

Wire Payment

Mail Check

Return check to University and hold for pick up Rush-ACH or standard mail delivery

CCR (Credit Card) Rush-Overnighted Check. Department is responsible for UPS Fee.

ACH Direct Debit(Payroll&HR)

GL Description (Briefly describe the purpose of the charge which will post to the General Ledger. Field is limited to 25 characters.)
TEST

PAYMENT PURPOSE (Enter a detailed explanation of this payment that provides enough information to allow an approver or an auditor to understand).
TEST #1 - DocuSign workflow with Dan

REQUIRED FOR ALL REQUESTS

REQUESTED BY: **BUDGET OFFICER APPROVAL up to \$10,000:**

Printed Name: Ken Pifer Printed Name: Kenneth Pifer

Signature:  Signature: 

Date: 3/30/2020 Date: 3/31/2020

ADDITIONAL APPROVAL AS NEEDED

FISCAL OFFICER APPROVAL \$10,000-50,000: **Sr. VP or VP of Division APPROVAL \$50,000 and above:**

Printed Name: _____ Printed Names: _____

Signature: _____ Signatures: _____

Date: _____ Dates: _____

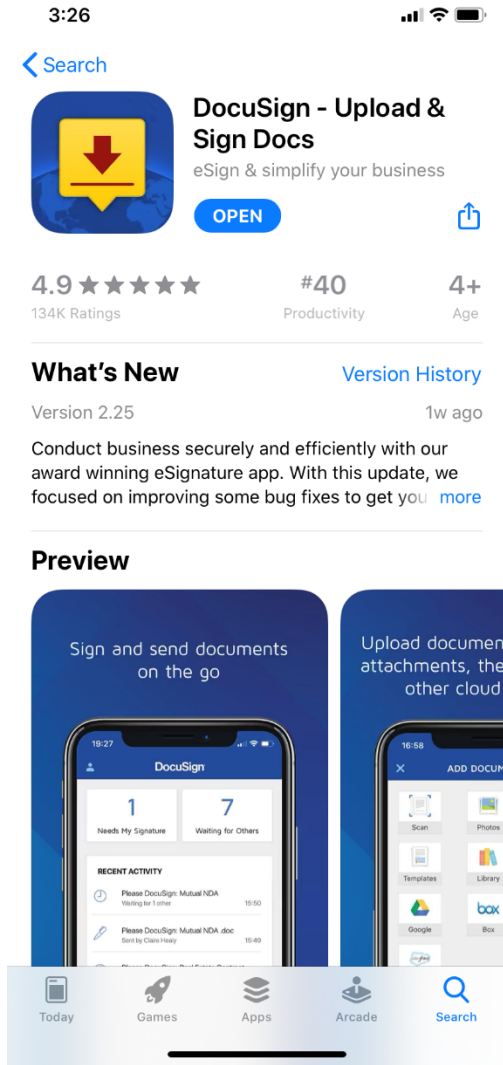
Attach all original invoice(s). For new vendors, please submit the company's W-9 with ACH Payment Authorization form. Forms can be found in WU Portal under Forms tab or click [here](#).

Test-Big Vendor.pdf 1 of 1

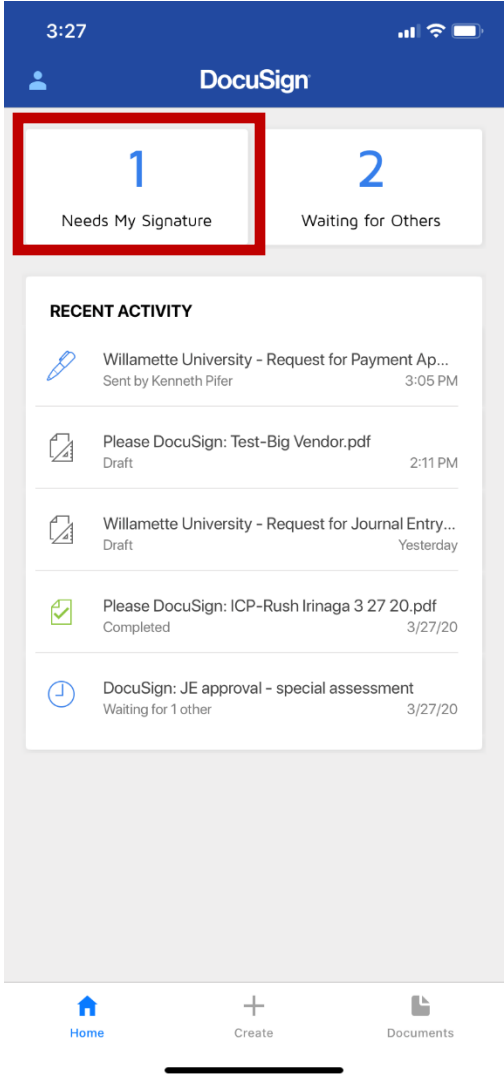
Once you click “Finish,” you will receive a confirmation by email, and the next approver will receive a notification.

⇒ *Hint: You can view items you have submitted or approved in the Manage screen if you have a DocuSign account. If you are the requester, your requests will show in the Inbox and the Sent box. If you are an approver, you will see requests routed to you for approval in the Inbox.*

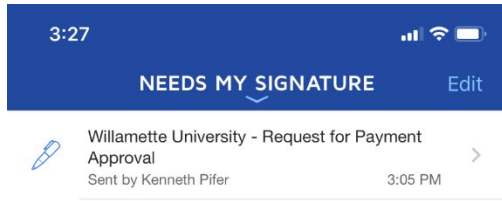
If you have a DocuSign account, you can download the DocuSign mobile app, which allows you to review and approve documents through a simple mobile app.



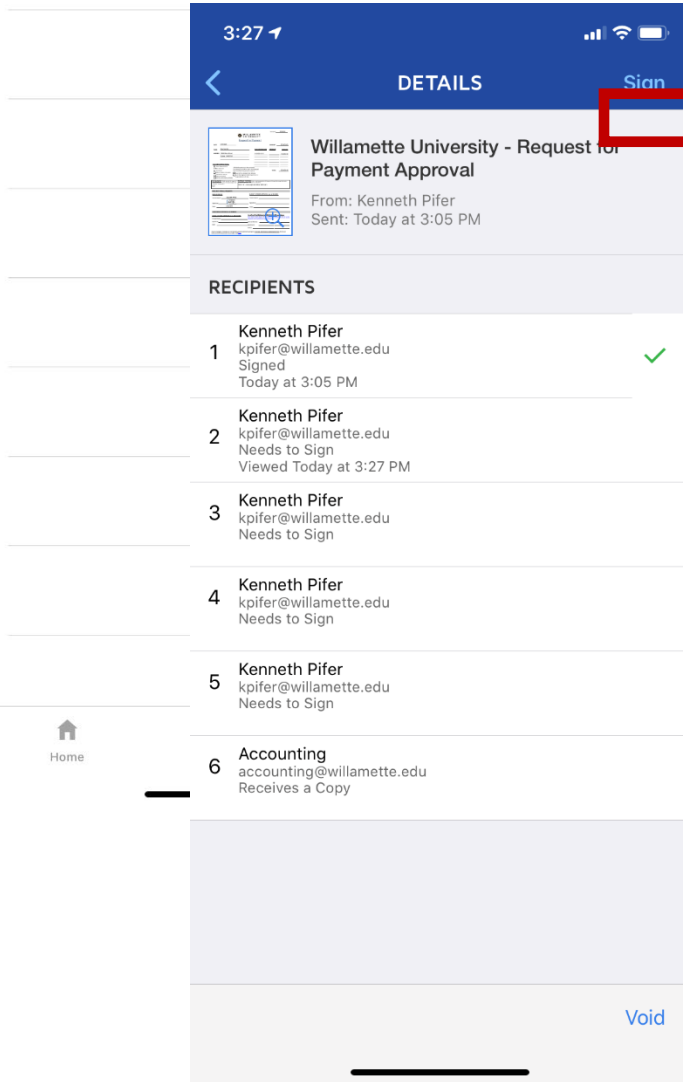
Download the DocuSign app from the App Store.



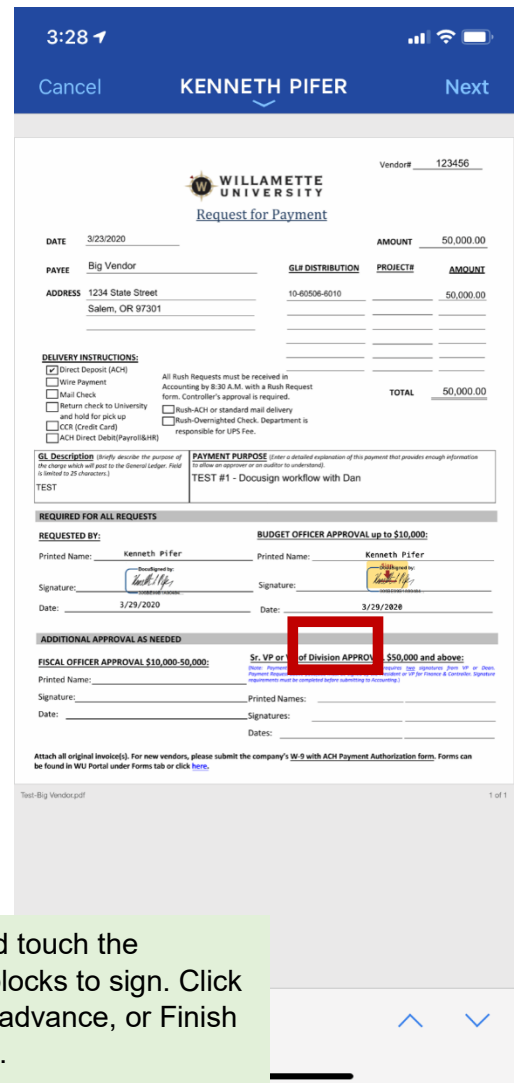
You will see a dashboard when the open the app. Select the box in the upper left corner, "Needs My Signature."



Select the document you wish to review.



You will see a summary of the workflow steps. Select "Sign" to proceed with the next step.



Review and touch the signature blocks to sign. Click on Next to advance, or Finish when done.