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 process of submitting a request for payment and related supporting documents and initiating the approval workflow.

Begin by completing a Request for Payment form. Do not complete any fields in the signature section (below the gray bar labeled “Required for All Requests). Approval recipients will be selected in DocuSign. Save the completed request for payment form.

**Complete this section as you normally do. Note: it is important to use the form, and the latest version of the form, so the signature blocks line up in DocuSign.**

**Complete the printed name and date fields under Requested By. Do not complete anything else in this section - approvers will be selected in DocuSign, and then DocuSign will do the work for you!**
Sign in to DocuSign. To access DocuSign from the WU Portal:

TBD – Link to DocuSign coming to WU Portal soon! In the meantime, once an account has been created for you, you can sign on to DocuSign at https://account.DocuSign.com/

Once you sign in to DocuSign, you will see a home page similar to the following:

![DocuSign Home Page](image-url)
Click the “New” button at the top next to “Sign or Get Signatures” and select “Send an Envelope.”

Select “Upload.”

Browse to your previously completed and saved Request for Payment form, and select it. DocuSign will identify the format as matching the Request for Payment template. Select “Apply.”

**Important Note:** In order to produce archivable and auditable records, it is important to submit one request for payment form per envelope.

**Important Note:** Be sure to select the correct approval level, and if you change the selection, deselect the default. This field is not a toggle.
Once the form has been uploaded and you have applied the correct template, upload additional supporting documents by selecting “Upload.” It is really important to include all necessary supporting documents. Where possible request invoices electronically from vendors, and upload them. If necessary, scan paper documents.
Once all necessary supporting documents have been uploaded, add the approvers in the section “Add Recipients to the Envelope.”

**Important Note:** Each recipient field must have a value. Be sure the appropriate template for the required level of approvals is selected. An individual may appear two or three times. For instance, if you are a Fiscal Officer, and are preparing your own request for a $50,000 payment, you will be the Requestor and Fiscal Officer, and you may be the Budget Officer as well.
Once you have uploaded the form and all supporting documents, and designated the approvers, click the “Send Now” button at the bottom.
Once you click “Send Now,” you will need to sign the document. Click on “Sign Now.”

Then click on “Continue.”

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

Hint: There is not a “send it back” option, or an opportunity for questions. Be sure the payment is ready to be approved, and any questions/issues addressed, before submitting it.
You will have an opportunity to verify or edit your signature.

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

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 in your DocuSign account. If you are the initiator, 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.
Question: What if I make a mistake? What if I need to change something on the Request for Payment form?

Answer: At this point, you cannot modify a request once it has been released for approvals. However, you can void it.

To void a payment request, login to your account on DocuSign, and select “Manage” at the top. Find the transaction you wish to void, and click on the down arrow to view the menu. Select “Void” and

Key in the reason you are voiding the request, and click “Void.”
Question: How do I submit a rush request?

Answer: Rush requests can be submitted with a request for payment through DocuSign.

Complete the Rush Request as you normally would. After uploading the Request for Payment form and supporting documentation, upload the Rush Request. When designating recipients, you will need to designate the “Rush Budget Officer.”

Upload the Rush Request after the Request for Payment and supporting documentation, and apply the template.

In addition to the Request for Payment approver, you will need to designate an approver for the Rush Request.
**Question:** The notifications are overwhelming me! Is there a way to cut down on DocuSign spam?

**Answer:** If you have a DocuSign account, you can adjust your notifications.

To adjust notifications, click on the *Edit* link next to My DocuSign ID.

From the “Personal Information” page, select *Notifications.*
On the “Notifications” page, you will have the opportunity to select options when you are the sender, and when you are the recipient.