

Using Shared Forms for Purchases

1) Log into DocuSign using your UF credentials

2) Select “Templates” header along the top of screen and then select “All Templates” on the left hand side.



3) Locate the appropriate form to be used for your item. Select the blue “Use” button to the right.

Citrus REC Business Office Templates			Search My Templates	FILTERS
Name	Owner	Last change		
<input type="checkbox"/> PI as Card Holder: P-Card Non Shipping Receiving DocuSign Form Eligible for matching	Tamara Siegel	4/27/2018 04:14 pm	USE	▼
<input type="checkbox"/> P-Card Non Shipping Receiving DocuSign Eligible for matching	Tamara Siegel	4/27/2018 04:13 pm	USE	▼



The PI as Card Holder form should only be used if you are the signing authority for the funds being used to pay for expense.

4) Add recipient names and email addresses to assign roles of Card Holder and Principle Investigator. Leave signing order and Fiscal Office information as is.

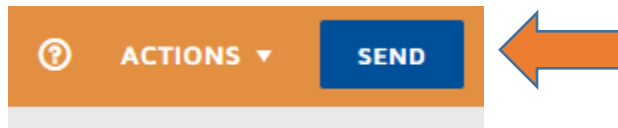
Add Recipients to the Envelope

As the sender, you automatically receive a copy of the completed envelope.

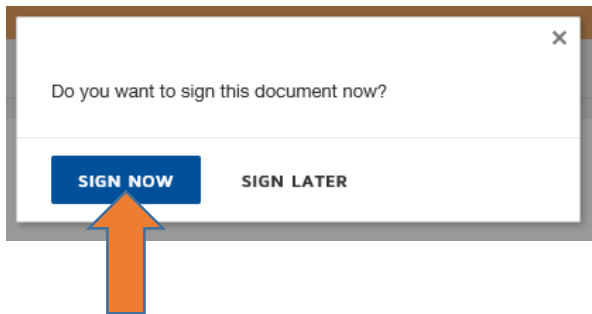
Set signing order

1	Card Holder Name Email NEEDS TO SIGN MORE
2	Principle Investigator Name Email NEEDS TO SIGN MORE
3	Fiscal Office CREC Business Office CREC-AP-BO@ifas.ufl.edu CC RECEIVES A COPY MORE

5) Select "Send" in lower left hand corner



6) Option will be given to sign now or later. Select the "sign now".



7) DocuSign will prompt you to complete information or signatures required by you.

7A) Select paperclip icon to attach the receipt(s).

7B) You as the card holder, should fill in the information you know. The PI will be provided an opportunity to change this information once form gets to them.

Scan and Upload itemized receipts from:
 Store Purchases (Home Depot, Walmart, etc.)
 Gas, Repairs, and Rental (write Vehicle/Tag # on Receipt)
 Phone Bill, Invoices, etc.

Date:

Card Holder Name:

Card Holder Signature:

P.I. Signature:

UF ID #:

Vendor Name:

Dept. 6073 or Other:

Project #: Source of Fund:

Fund Code: Flex #:

Program Code: CRIS REEport #:

Vehicle/Tag # (gas and repairs):

Total Paid:

NEXT

8) Select the “Finish” in upper righthand corner. This will move document to faculty member and upon completion will be sent to fiscal office. This will remain in your DocuSign home page until it is completed by both yourself and the faculty member.