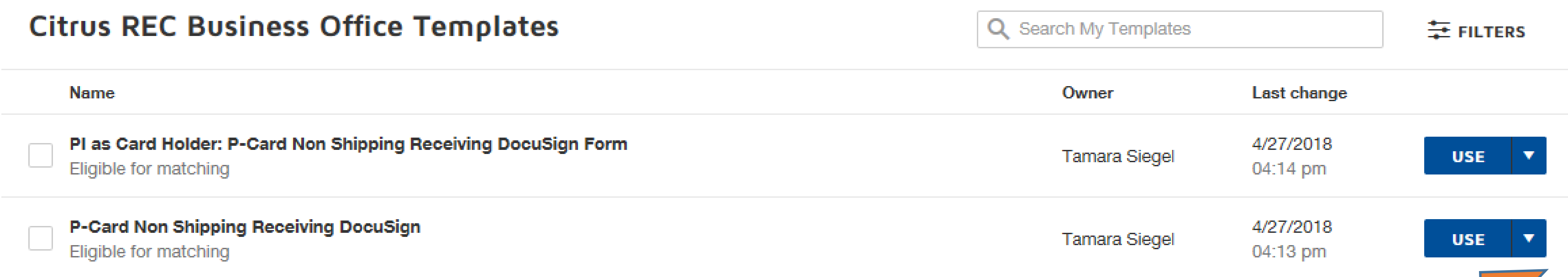
Using Shared Forms for Purchases

1) Log into DocuSign using your UF credentials

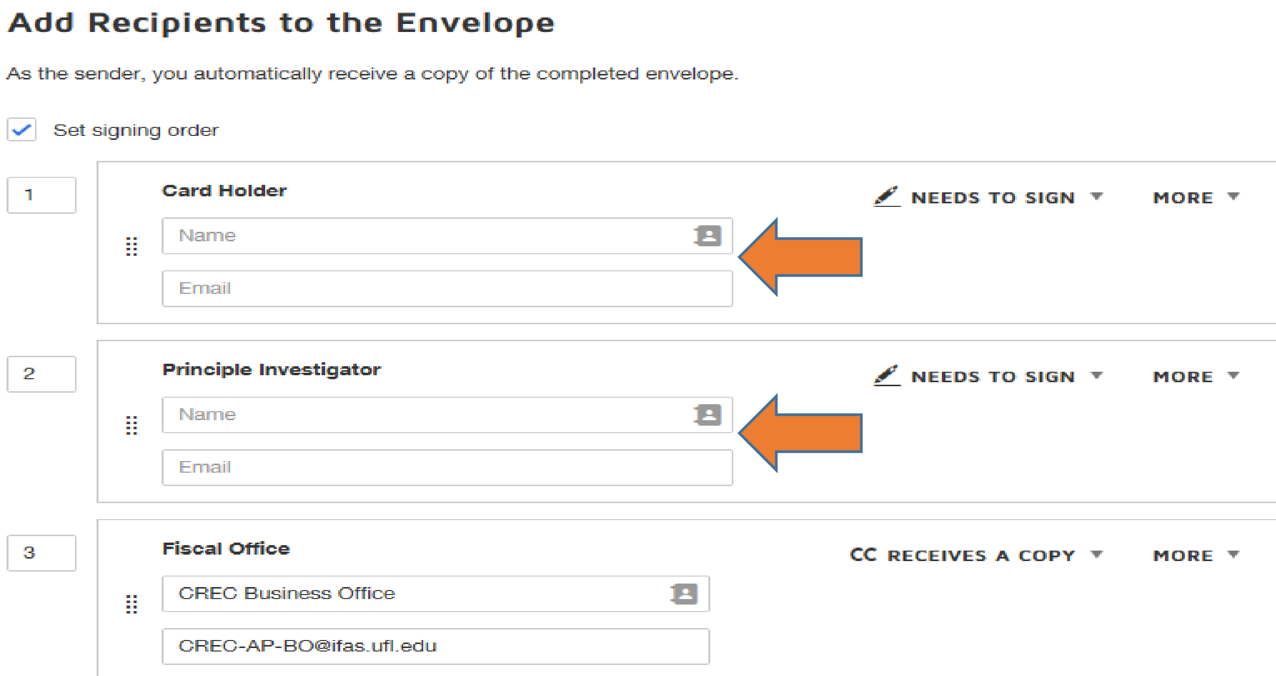
2) Select “Templates” header along the top of screen and then select “All Templates” on the left hand side.

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



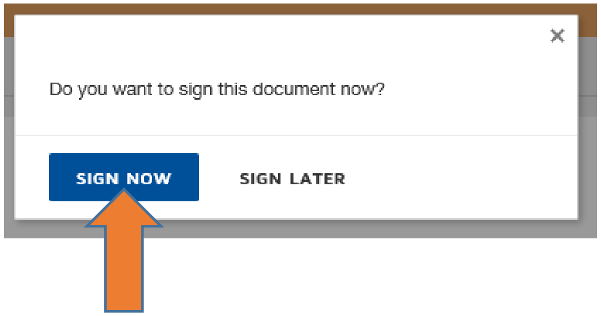
The PI as Card Holder form should only be used if you are the signing authority for the funds being used to pay for expense.

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.



5) Select "Send" in lower left hand corner

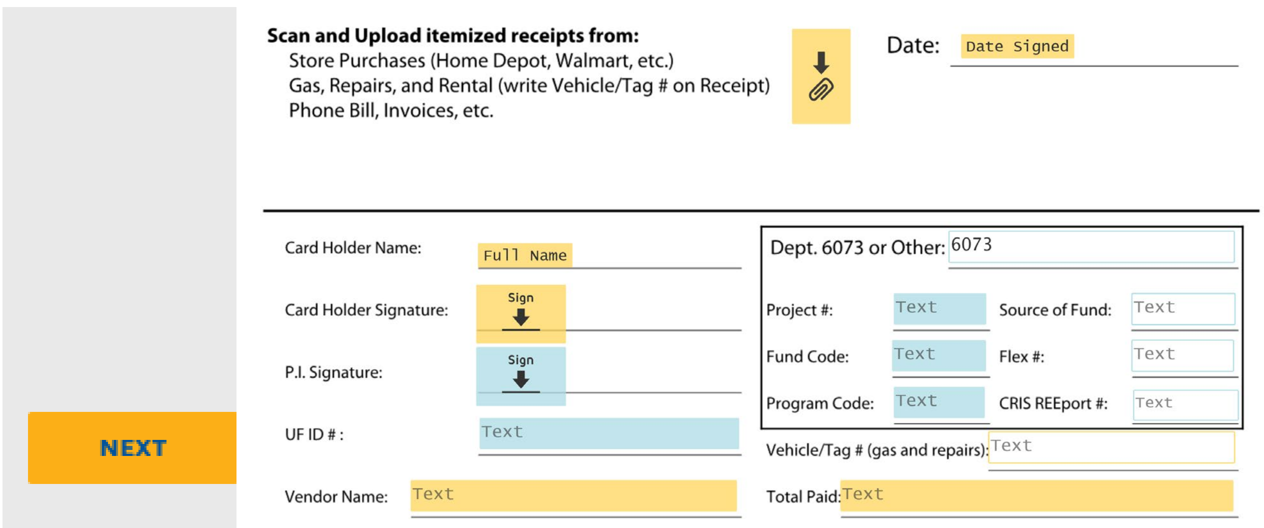
6) Option will be given to sign now or later. Select the "sign now".



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.



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.