

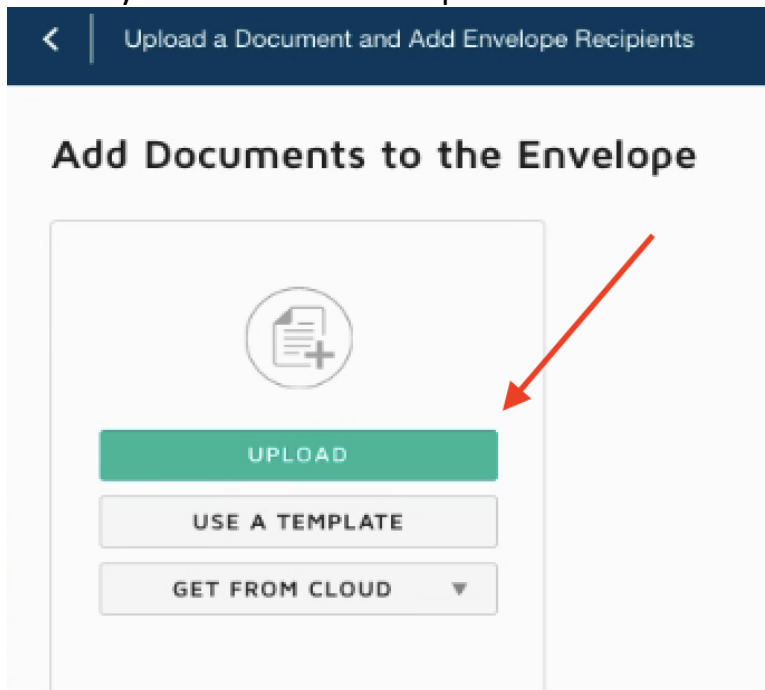
# DocuSign Instructions

\*Review the following instructions for general departmental DocuSign procedures. If you have specific questions regarding signature order or reviewing procedures contact the CAO

1. Go to UCSB [DocuSign](https://docuSign.lsit.ucsb.edu/using-docuSign#project)  
<https://docuSign.lsit.ucsb.edu/using-docuSign#project>
2. Login using your UCSB NetID email
3. Once you are logged in click “new”
4. Select “Send an Envelope” from the drop down

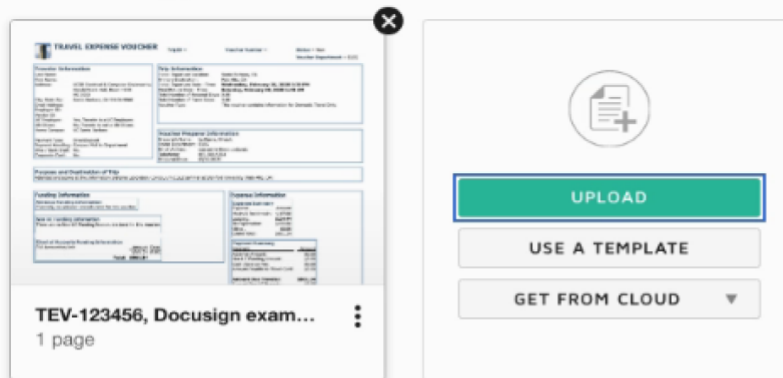


5. To add your reimbursement packet that needs to be signed, click “upload.”



6. After your packet has fully loaded, scroll down and click the “set signing order” box.

### Add Documents to the Envelope



### Add Recipients to the Envelope

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

Set signing order

**Name \*** NEEDS TO SIGN ▾ MORE ▾

**Email \***

7. The reimbursee should be the first to sign.
  - Enter their Legal name. Whatever is entered in the “Name” section on docusign will show up on the final document
  - Enter the email the reimbursee provided on their worksheet
8. Once you have entered the reimbursee’s name and email, select “Add Recipient” to enter the Department Approver’s name and email.
  - Note: For reimbursements that require the Chair or the Dean’s signature you will need more than two assigned signatures. If you are not sure which signatures are needed or in what order they are

supposed to be, please contact the CAO

Set signing order

1

Name \*  
Reimbursee

Email \*  
example@example.edu

NEEDS TO SIGN MORE

ADD RECIPIENT ADD CONDITIONAL RECIPIENT

9. After entering the recipients click “next” in the bottom right hand corner of the page

Add Recipients to the Envelope

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

ADD FROM CONTACTS SIGNING ORDER

Set signing order

1

Name \*  
Reimbursee

Email \*  
example@example.edu

NEEDS TO SIGN MORE

2

Name \*  
Approver

Email \*  
approverexample@ucsb.edu

NEEDS TO SIGN MORE

ADD RECIPIENT ADD CONDITIONAL RECIPIENT

SEND NOW NEXT

10. In the left panel you will see the docusign tools you can use to create fillable fields for your recipients

Reimbursee

144%

Search Fields

Standard Fields

- Signature
- Initial
- Date Signed
- Name
- Email
- Company
- Title
- Text
- Checkbox
- Dropdown
- Radio
- Payment Item

TRAVEL EXPENSE VOUCHER

TripID = Voucher Number = Status = Now Voucher Department = ELEG

**Traveler Information**  
Last Name: UCSB Electrical & Computer Engineering  
First Name: Harold Frank Hall, Room 4155  
Address: MC 9560  
City, State Zip: Santa Barbara, CA 93106-9560  
Email Address:  
Vendor ID:  
Employee ID:  
UC Employee: Yes, Traveler is a UC Employee.  
US Citizen: No, Traveler is not a US Citizen.  
Home Campus: UC Santa Barbara

**Trip Information**  
Initial Departure Location: Santa Barbara, CA  
Primary Destination: Palo Alto, CA  
Initial Departure Date - Time: Wednesday, February 26, 2020 5:30 PM  
Final Return Date - Time: Saturday, February 29, 2020 1:45 AM  
Total Number of Personal Days: 0.00  
Total Number of Travel Days: 3.00  
Voucher Type: This voucher contains information for Domestic Travel Only.

**Voucher Preparer Information**  
Preparer's Name: La Pierre, Olivia L  
Home Department: ELEG  
Email Address: cao-admin@uccs.ucsb.edu  
Telephone: 805-893-5364  
Prepared Date: 03/31/2020

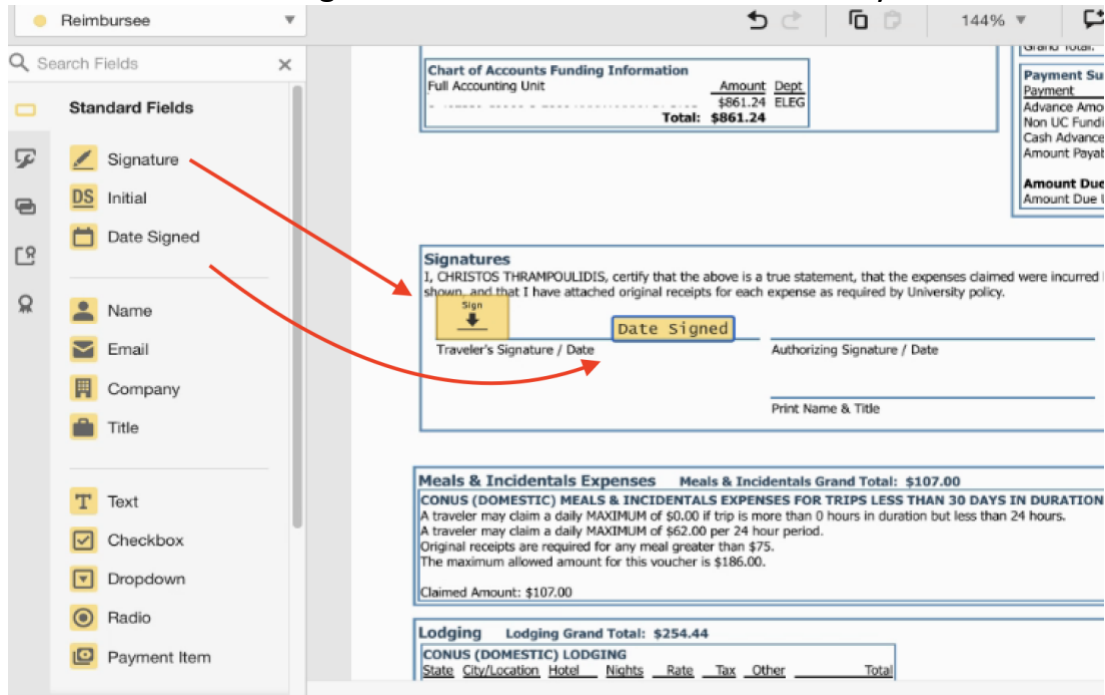
**Purpose and Destination of Trip**  
Attended and spoke at the Information Systems Laboratory Colloquium (ISL) Seminar at Stanford University (Palo Alto, CA)

**Funding Information**  
Advance Funding Information  
Currently, no advance records exist for this voucher.  
Non UC Funding Information

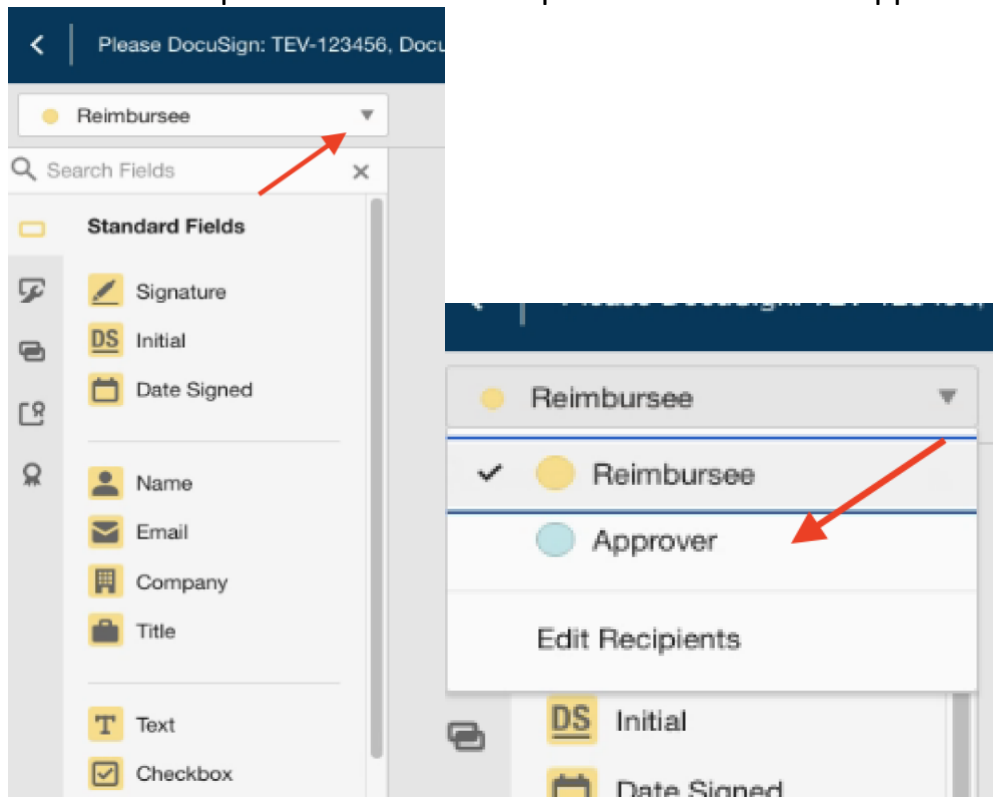
**Expense Information**  
Expense Summary  
Expense Amount  
Meals & Incidentals: \$107.00  
Lodging: \$254.44

Documents  
TEV-123456, Docusign...  
Pages: 1

11. Select a tool and drag the field to the correct location on your document



12. The fillable fields will be different colors for each recipient. This means when the recipient receives the document they will only be able to fill the field that is designated for them. To change the fields so that they belong to a another recipient click on the drop down menu in the upper left corner.



13. Drag and drop the required fields. Include Fields for the authorizing signer's full name and title (note: when completing a Supplies reimbursement Admin Assistants will input the Authorizing Signer's name and title in the disbursement voucher, so only their signature and date is needed if their name and title already appears on the document)

The screenshot shows a document editor interface. On the left is a sidebar titled "Standard Fields" with a search bar and various field types: Signature, Initial, Date Signed, Name, Email, Company, Title, Text, Checkbox, Dropdown, Radio, and Payment Item. On the right is a document form with several sections:
 

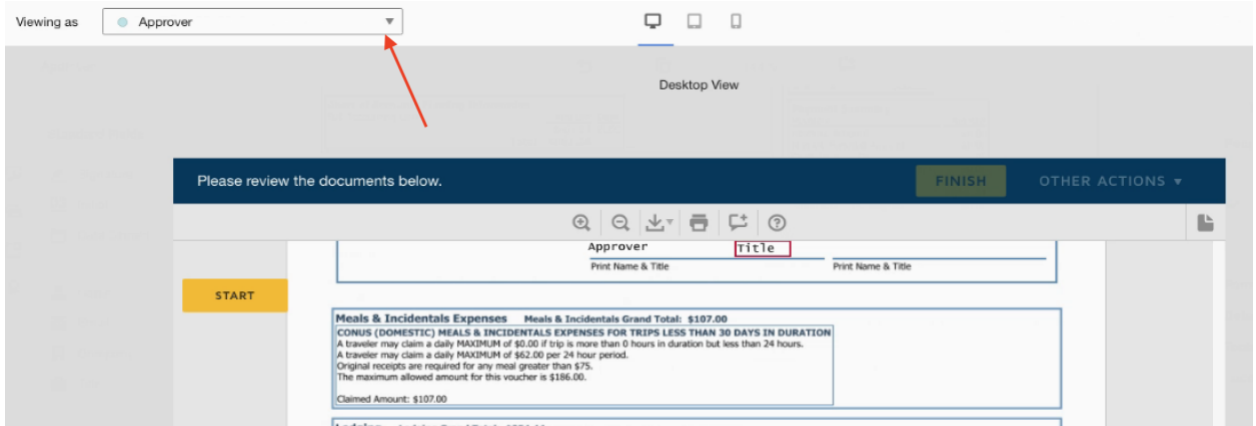
- Chart of Accounts Funding Information:** A table with columns for Full Accounting Unit, Amount, and Dept. It shows a total of \$861.24 for ELEG.
- Payment Summary:** A table with columns for Payment and Amount. It lists Advance Amount, Non UC Funding Amount, Cash Advance Fee, Amount Payable to Travel Card, Amount Due Traveler (\$861.24), and Amount Due UC Regents (\$0.00).
- Signatures:** A section with a statement and two signature lines. Each line has a "Sign" button, a "Date Signed" field, and a "Print Name & Title" field. Red arrows point from the "Name" and "Title" fields in the sidebar to these "Print Name & Title" fields.
- Meals & Incidentals Expenses:** A section with a heading, a grand total of \$107.00, and detailed rules for claiming expenses.
- Lodging:** A section with a heading, a grand total of \$254.44, and a table for logging expenses.

14. To review your document and view what your recipients will see click "recipient preview"

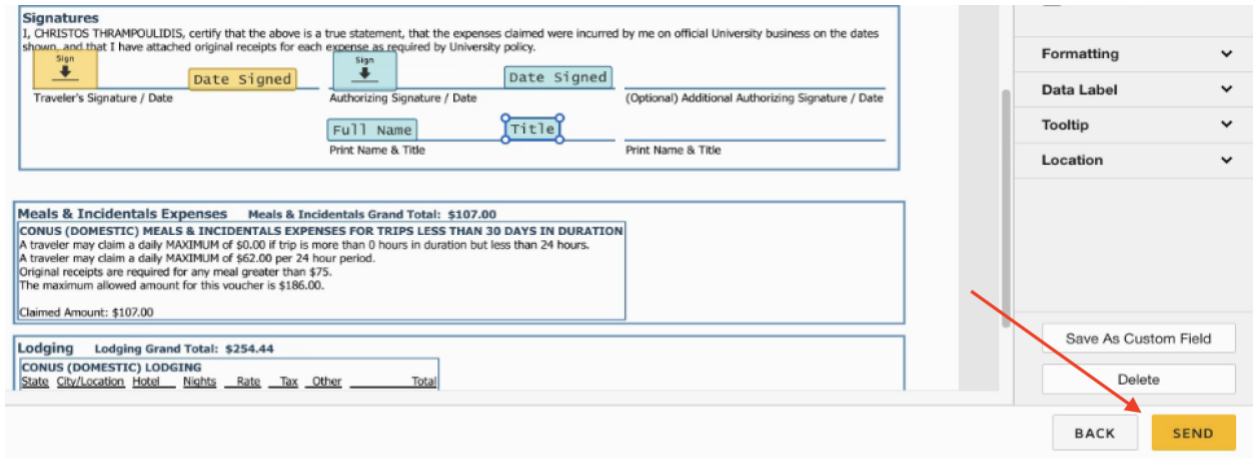
The screenshot shows the document editor interface with a focus on the "RECIPIENT PREVIEW" button in the top right corner. A red arrow points to this button. The document form is visible in the background, and a sidebar on the right shows recipient settings:
 

- Recipient:** Approver (selected)
- Required Field
- Read Only
- Formatting:** (dropdown)
- Data Label:** (dropdown)
- Tooltip:** (dropdown)
- Location:** (dropdown)
- Buttons: Save As Custom Field, Delete

15. To change to a different recipient's view, select from the drop down menu in the upper left corner



16. Once you have reviewed your document and made sure all names and emails are correct click send



If you have any questions about this process contact [cao-admin@ece.ucsb.edu](mailto:cao-admin@ece.ucsb.edu)