

Utilization of the DocuSign General Authorization (GA)

1. Choose desired DocuSign General Authorization (GA) version:
 - Version 1: **Dean Signature Required.** Please use this version to route all purchasing requests that do not utilize contract and/or grant funds as a funding source.
 - All requests for purchasing utilizing a School of Social Work program budget (i.e. MSW, BSW, PhD, Dean, etc.), endowment income funds, Capstone funds, Carry forward funds, and/or discretionary funds require the Dean's signature.
 - **ALL** requests for **HIRING** regardless of the funding source (staff or student hiring) require the Dean's signature.
 - A Program Director/Coordinator's signature should be entered on this version if applicable.
 - Please allow a minimum 7-days for review and approval.
 - Version 2: **Dean's Signature NOT required.** Please use this version to route all purchasing requests (EXCEPT hiring) that are utilizing contract/grant funds as the funding source.
 - A PI's signature will be required with this version.
2. Once you have chosen the GA based on the purchasing request funding source, enter the appropriate signature route based on the funding source:
 - For example, requests using a **Dean Signature Required GA** funded by a program budget require the signature of a Program Director; requests funded by discretionary funds, Capstone funds, and Carry forward funds do not require the signature of a Program Director... only require the Dean's signature; requests funded by endowment income funds only require the Dean's signature, etc.
 - Requests using a **Dean's Signature NOT required GA** which utilize contract/grant funds would need to route through (a) the Program Director/Coordinator (if applicable) AND (b) the PI (required).
 - You do not have to enter Fiscal into the approval route. All GAs will route through the Fiscal Manager and the Fiscal Office automatically.
 - After you have entered the name and email addresses for all approvers, click **BEGIN SIGNING** to enter information into your GA document.
3. Begin entering information into the DocuSign document. **Please attach any necessary documentation to the document (i.e. pre-trip approvals, student hiring grids, price quotes, invoices, branding/sponsorship approval, etc.).** Documentation will need to be converted to .pdf format and combined into one file. Please note, your document will be declined if necessary documents are not attached.
 - Enter Description of Item Needed
 - Enter the Item Purpose
 - Enter the Essential Purchase Justification

- Enter Additional Comments (optional)
 - Date GA is Needed
 - Attach Necessary Documents
 - Enter FOAP for purchase (related to the funding source)
 - Enter Funding Source
 - Once you have entered all required fields, submit your GA by clicking FINISH
4. To monitor your GA along the approval route:
- Log into DocuSign
 - At the top of the homepage, select the **Manage** tab
 - Select **Inbox** - The Inbox only shows envelopes (General Authorization Forms) for which you were a recipient in the routing queue.
 - Select **Sent** - The Sent box will show documents that you initiated yourself.
 - If the status is “Waiting for Others”, you can click on that hyperlink and the entire routing queue and individual status for each signer will be displayed.
5. Once your GA is fully executed:
- As the initiator, you will receive a copy
 - The Fiscal Manager will receive a copy
 - The Fiscal Office will receive a copy
 - Please note, if a program budget is utilized, the applicable program assistant will also receive a copy.
6. Uploading Attachments in DocuSign
- You can only upload **ONE** pdf attachment in DocuSign. Please see instructions below for instructions to convert your supporting documentation into a pdf file and upload as one single attachment in DocuSign.
 - [Save or convert Word, Excel, or other file to a PDF](#)
 - [Combine multiple pdf documents into one single file](#)