Departmental Payment Forms – Document Tracking

The Departmental Payment Form is a DocuSign PowerForm. This allows users without a DocuSign account to initiate a DocuSign document to be routed for approval and signature. The PowerForm does not keep the preparer of the document informed throughout the DocuSign process. As a work around, Financial Accounting is adding a new signer to the process. The Document Tracking signer should be the same name and email as the preparer in the preceding block.
After the preparer completes the signing roles above and the Departmental Payment Form, the Document Tracking signer will receive an email with a copy of the document in process. This will allow the preparer to view history and locate where the document currently resides.

Note the message for the Document Tracking below – Financial Accounting sent you a copy. There is no step to complete. You are not required to review the document at this time. The document goes directly to the next step in the process – Paying Department – Approval #1 in our case.

Choose the Review Document button in order to see the current state of the document and to view history.
The document opens in its current state of In Process. To view the activity of the document, choose Other Actions in the top right corner.

Under Other Actions, choose View History to see actions taken on this particular document.
History shows all the activity initiated on this document.

- The envelope was created via Financial Accounting’s PowerForm link.
- Preparer opened and viewed in session (basically completed the fields in the form)
- Preparer signed the envelope (chose Finish)
- Email invitations were sent to the Document Tracker and the Approver #1 (email addresses are listed here)

As the process continues to the approver, you may return to the initial Document Tracking email received to review the document again. The history continues to update as actions are taken on the document.
The history continues:

- The approver opened the envelope, viewed it and signed it.
- Email invitation was sent to the Billing Department.
- The Document Tracker viewed the document again.
The billing department then viewed the envelope and signed it (chose Finish).

Notice the Status of the document to the right changed to Completed.

The Completed document is sent to parties related to the document:
- Financial Accounting as the owner of the template
- Preparer
- Document Tracker
- Approver
- Billing

Note the drawback to adding the new signing role: The preparer will receive 2 copies of the completed document.
If the document is declined, the Document Tracker will now receive a declined notification. The reason for decline can be viewed in history.

Financial Accounting will no longer forward a copy of the decline email.
The completed form will be accompanied by a pdf of the document and Completed in the subject.

When a document fails due to an email delivery failure, these notifications are only received by the Financial Accounting email and will be corrected as quickly as possible.