

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.

PowerForm Signer Information

DEPARTMENTAL PAYMENT FORM

Fill in the name and email for each signing role listed below.

Signers will receive an email inviting them to sign this document.

The Paying Department - Preparer will complete the FOAP information.

Please enter your name and email to begin the signing process.

Paying Department - Preparer

Your Name: *

Your Email: *

Please provide information for any other signers needed for this document.

Document Tracking - same as Preparer (required)

Name: *

Email: *

Paying Department - Approval #1

Name: *

Email: *

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.

Please DocuSign: Departmental Payment Form



DocuSign Demo System <dse_demo@docusign.net>
To: Meredith Boteler

 Reply



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Financial Accounting sent you a copy.

REVIEW DOCUMENT

Financial Accounting
finacctng@ua.edu

DEPARTMENTAL PAYMENT FORM

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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.

[CLOSE](#) [OTHER ACTIONS](#)

DocuSign Envelope ID: 7AC0246D-2CEB-4E62-833C-1824B91D7E78

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www.docusign.com

THE UNIVERSITY OF ALABAMA

Division of
Finance and Operations
Financial Accounting and Reporting

DEPARTMENTAL PAYMENT FORM

PAYING DEPT: test

DATE: March 30, 2021

PREPARED BY: Meredith Boteler - Preparer

EMAIL: mbbotele@ua.edu

DESCRIPTION OF TRANSACTION:

test

FOAP(S) to be CHARGED:

Check if FOAP information included on attachment

CHART OF ACCOUNTS	FUND	ORGN	ACCT	PROG	ACTV	AMOUNT (Debit + / Credit -)	Debit(D) / Credit (C)
1 A	11000	502401	71210	600		900	D - Debit
2							
3							
4							
5							
6							
7							
8							

TOTAL: 900.00

APPROVED BY: _____

DATE: _____

APPROVED BY*: _____

DATE: _____

*Optional Secondary Approval

BILLING DEPT: test

DATE: _____

RECEIVED BY: _____

EMAIL: _____

Under Other Actions, choose View History to see actions taken on this particular document.

[CLOSE](#) [OTHER ACTIONS](#)

DocuSign Envelope ID: 7AC0246D-2CEB-4E62-833C-1824B91D7E78

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THE UNIVERSITY OF ALABAMA

Division of
Finance and Operations
Financial Accounting and Reporting

DEPARTMENTAL PAYMENT FORM

PAYING DEPT: test

DATE: March 30, 2021

PREPARED BY: Meredith Boteler - Preparer

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6							

APPROVED BY: _____

DATE: _____

APPROVED BY*: _____

DATE: _____

*Optional Secondary Approval

BILLING DEPT: test

DATE: _____

RECEIVED BY: _____

EMAIL: _____

[CLOSE](#) [OTHER ACTIONS](#)

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[Session Information](#)

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)

Envelope History

Activity History

Time	User	Action	Activity	Status
March 30, 2021 18:22	Financial Accounting (English (US)) [Web130.160.7.151]	Registered	The envelope was created by Financial Accounting	Created
March 30, 2021 18:22	Meredith Boteler - Preparer (en) [Web130.160.7.151]	Opened	Meredith Boteler - Preparer opened the envelope [documents:(DocuSign - Departmental Payment Form.pdf)]	Sent
March 30, 2021 18:22	Meredith Boteler - Preparer (en) [Web130.160.7.151]	Viewed In-Session	Meredith Boteler - Preparer viewed the envelope in a session hosted by University of Alabama - TEST [documents:(DocuSign - Departmental Payment Form.pdf)]	Sent
March 30, 2021 18:22	Meredith Boteler - Preparer (en) [Web130.160.7.151] Signed in Location	Signed	Meredith Boteler - Preparer signed the envelope	Sent
March 30, 2021 18:22	Financial Accounting (en) [Web130.160.7.151]	Sent Invitations	Financial Accounting sent an invitation to Meredith Boteler - Track [mbbotele@ua.edu Document Tracking - Preparer (required)]	Sent
March 30, 2021 18:22	Financial Accounting (en) [Web130.160.7.151]	Sent Invitations	Financial Accounting sent an invitation to Meredith Boteler - Approver [mboteler15@gmail.com Paying Department - Approval #1]	Sent
March 30, 2021 18:22	Meredith Boteler - Preparer (en) [Web130.160.7.151]	Viewed In-Session	Meredith Boteler - Preparer viewed the envelope in a session hosted by University of Alabama - TEST [documents:(DocuSign - Departmental Payment Form.pdf)]	Sent

CLOSE

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.

Envelope History					
March 30, 2021 18:24	Meredith Boteler - Track (en) [Web130.160.7.151]	Viewed	Meredith Boteler - Track viewed the envelope [documents: (DocuSign - Departmental Payment Form.pdf)]	Sent	
March 30, 2021 18:29	Meredith Boteler - Approver (en) [Web130.160.7.151]	Opened	Meredith Boteler - Approver opened the envelope [documents: (DocuSign - Departmental Payment Form.pdf)]	Sent	
March 30, 2021 18:29	Meredith Boteler - Approver (en) [Web130.160.7.151]	Viewed	Meredith Boteler - Approver viewed the envelope [documents: (DocuSign - Departmental Payment Form.pdf)]	Sent	
March 30, 2021 18:29	Meredith Boteler - Approver (en) [Web130.160.7.151] Signed in Location	Signed	Meredith Boteler - Approver signed the envelope	Sent	
March 30, 2021 18:29	Financial Accounting (en) [Web130.160.7.151]	Sent Invitations	Financial Accounting sent an invitation to Meredith Boteler - billing [mboteler15@gmail.com Billing Dept - Receipt]	Sent	
March 30, 2021 18:29	Meredith Boteler - Approver (en) [Web130.160.7.151]	Viewed	Meredith Boteler - Approver viewed the envelope [documents: (DocuSign - Departmental Payment Form.pdf)]	Sent	
March 30, 2021 18:29	Meredith Boteler - Track (en) [Web130.160.7.151]	Viewed	Meredith Boteler - Track viewed the envelope [documents: (DocuSign - Departmental Payment Form.pdf)]	Sent	
March 30, 2021 18:29	Meredith Boteler - billing (en) [Web130.160.7.151]	Opened	Meredith Boteler - billing opened the envelope [documents: (DocuSign - Departmental Payment Form.pdf)]	Sent	

- 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.

Envelope History

30, 2021 18:31	Meredith Boteler - billing (en) [Web130.160.7.151]	Viewed	Meredith Boteler - billing viewed the envelope [documents: (DocuSign - Departmental Payment Form.pdf)]	Delivered
March 30, 2021 18:31	Meredith Boteler - billing (en) [Web130.160.7.151] <small>Signed in Location</small>	Signed	Meredith Boteler - billing signed the envelope	Completed
March 30, 2021 18:31	Financial Accounting () [Web130.160.7.151]	Printable Copy Attached to Email	Financial Accounting was sent the document (DocuSign - Departmental Payment Form.pdf) attached to the completed email	Completed
March 30, 2021 18:31	Meredith Boteler - Preparer () [Web130.160.7.151]	Printable Copy Attached to Email	Meredith Boteler - Preparer was sent the document (DocuSign - Departmental Payment Form.pdf) attached to the completed email	Completed
March 30, 2021 18:31	Meredith Boteler - Track () [Web130.160.7.151]	Printable Copy Attached to Email	Meredith Boteler - Track was sent the document (DocuSign - Departmental Payment Form.pdf) attached to the completed email	Completed
March 30, 2021 18:31	Meredith Boteler - Approver () [Web130.160.7.151]	Printable Copy Attached to Email	Meredith Boteler - Approver was sent the document (DocuSign - Departmental Payment Form.pdf) attached to the completed email	Completed
March 30, 2021 18:31	Meredith Boteler - billing () [Web130.160.7.151]	Printable Copy Attached to Email	Meredith Boteler - billing was sent the document (DocuSign - Departmental Payment Form.pdf) attached to the completed email	Completed
March 30, 2021 18:31	Meredith Boteler - billing (en) [Web130.160.7.151]	Viewed	Meredith Boteler - billing viewed the envelope [documents: (DocuSign - Departmental Payment Form.pdf)]	Completed

If the document is declined, the Document Tracker will now receive a declined notification. The reason for decline can be viewed in history.

Declined: Please DocuSign: Departmental Payment Form



DocuSign Demo System <dse_demo@docuSign.net>
To: Meredith Boteler

Reply

Reply All



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Meredith Boteler declined to sign.

REVIEW DOCUMENT

Financial Accounting
finacctng@ua.edu

Meredith Boteler declined DocuSign - Departmental Payment Form.pdf. As a result, the documents cannot be completed.

Powered by

March 30, 2021 18:50	Meredith Boteler (en) [Web130.160.7.151]	Viewed	Meredith Boteler viewed the envelope [documents:(DocuSign - Departmental Payment Form.pdf)]	Sent
March 30, 2021 18:51	Meredith Boteler (en) [Web130.160.7.151]	Declined	Meredith Boteler declined the envelope [Reason: wrong]	Declined
March 30, 2021 18:56	Meredith Boteler (en) [Web130.160.7.151]	Viewed	Meredith Boteler viewed the envelope [documents:(DocuSign - Departmental Payment Form.pdf)]	Declined

CLOSE

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.


Completed: Please DocuSign: Departmental Payment Form

DocuSign Demo System <dse_demo@docusign.net>
To: Meredith Boteler

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We could not verify the identity of the sender. Click here to learn more.
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DocuSign - Departmental Payment Form.pdf
289 KB

[Open PDFs in /](#)



Your document has been completed

[VIEW COMPLETED DOCUMENT](#)

Financial Accounting
finacctng@ua.edu

All parties have completed Please DocuSign: Departmental Payment Form.

DEPARTMENTAL PAYMENT FORM

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.