

Direct Payment Form Frequently Asked Questions

1. Can the form be edited as it goes through the workflow?

Unfortunately, no. If something needs changed, the form would need to be declined and re-submitted.

2. If there are any errors once it hits AP, will they send an email or decline it?

Depending on the situation, AP has the ability to send an email and request what is needed in order to eliminate the need to decline the form at that point.

3. Typically, the AAs add the dean's signature once they approve. Are they able to sign for them in DocuSign?

No, the actual approver will have to sign in DocuSign.

4. What if my chair/supervisor is the same as the dean/director?

You will want to enter in your dean/director for both the chair/supervisor and dean/director sections and dean/director will have to sign the form twice.

5. Does DocuSign send continuous email notifications for the approver to review and approve?

Yes, after 2 days, the needed approver will receive reminder emails every 2 days until the signature is obtained or the form is declined.

If the form was started and not finished by the requestor, they will receive a reminder every 2 days for 120 days. The email notification will stop (for that person) after the form is signed, declined, or 120 days has been reached. After 120 days from start of the form, the envelope will expire and no longer be able to be signed by any recipients.

6. If declined by someone in the workflow, does it go back to the original point of contact?

Yes, the original point of contact (the requestor) will receive an email that the form has been declined.

7. Once I receive the email that notifies me that the Direct Pay Form Envelope has been completed, what does that mean?

This means that Accounts Payable has entered the payment for this form to be processed. Once entered, payments typically process on Thursdays.

8. Does my chair/supervisor or dean/director require the administrative assistants review prior to their signature?

Please work with your Department and dean/director to determine if they require such review. If yes, mark the applicable box and input the required reviewers name and the form will automatically route to them. **Note** for the chair/supervisor and dean/director, Accounts Payable will not be auditing this to know if the Department or dean/director requires a review. It is the Department and dean/director's responsibility to ensure those reviewer approvals are obtained as needed.

9. I am having trouble filling out this form and keep receiving notifications that all fields are not complete. What should I do?

Please watch the how to video on our website as it contains helpful tips in filling out this form. If you are still having issues, please contact [Linda Moore](#).

10. Will users be able to see their form's progress in DocuSign as it moves through approval?

Yes, all users in the approval work flow will be able to see the forms status in DocuSign, however, the requester will need to keep track of the original email received when submitting the form for approval in order to track the status of the form. While not ideal for the requester, DocuSign has confirmed this is a bug issue that they are working on, but there was no timeline received for when it will be resolved.

11. Can external users complete this form?

No, the form is restricted to only SRU employees. No one else will be able to gain access.

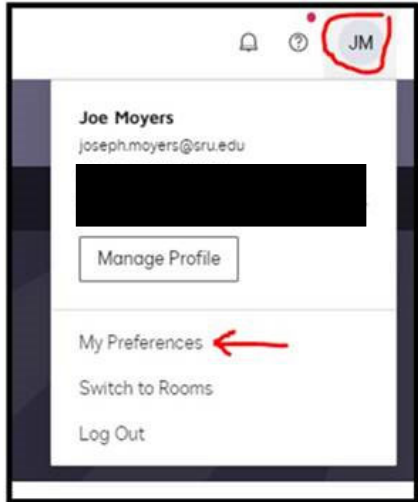
12. Should Students be completing this form?

No

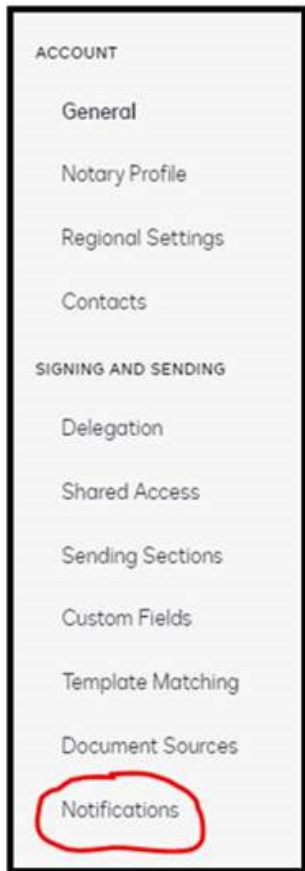
13. What if I am not receiving the completed document emails?

You may need to log into DocuSign and update your preferences.

Once you are logged in, click on your initials in the upper right corner of the page. Then when the menu appears, click on "My Preferences".



On the next page, click on the “Notifications” link on the left side.



Make sure the checkboxes below are checked. If not, check them and click the “Save” button at the bottom right of the page.

Notifications

Sending Notifications

Notify me when I am the sender and:

- Select All
- An envelope is complete
- A signer assigns or delegates an envelope to someone else
- A signer declines to sign
- A signer withdraws consent to do business online
- The first time each recipient views an envelope
- Envelope delivery to a recipient fails
- A signer's offline signature fails to synchronize
- Documents will be purged from the system
- When a response-limited Powerform hits either 70% or 100% of the responses limit
- A comment is posted in an envelope I've sent
 - All comments
 - Only comments that mention me or are private to me

Recipient Notifications

Notify me when I am a recipient and:

- Select All
- I have an envelope to sign
- An envelope is completed
- I am a copy-only recipient
- I am an acknowledge recipient
- Another signer declines to sign

