

DocuSign - Important Information

- The **Finance Approver Change Request Form** is now a DocuSign PowerForm. This makes signing and routing the form much easier.
- If you don't have a DocuSign account, please setup an account at <https://it.rutgers.edu/docusign/getting-started-with-docusign/>
- **Always use your Rutgers email address.** Check “Junk” and “Clutter” in your Rutgers email address for DocuSign notifications if you don't see them in your inbox.
- The person who is the requestor can be an admin, department head, or business manager.
- Enter accurate information for the routing of the form. Please check with your supervisor or unit's business manager for the names and email addresses for the individuals who will be signing the form.
- If your department does not require a business manager to sign the form, leave that routing information blank.
- Do not exceed the character limits of each field or your content could be missing important information.
- DocuSign forms can be saved and edited later by clicking “OTHER ACTIONS” or "FINISH LATER" in the top right corner of the form.
- The “FINISH” button will NOT work on any DocuSign form until all of the required information has been entered.
- You must click on the “FINISH” button before the form will route to the next individual in the routing list. **You cannot go back and edit the form once the “FINISH” button is clicked.**
- When all signatures have been obtained on a the Finance Approver Change Request Form, a copy of the fully-executed document is automatically emailed to the individual who initiated the form and all individuals who have signed the form.
- **Once the form is completed with all required signatures, the Requestor should save the form with the requestor's name and name of the form (e.g., Requestor Name- Finance Approver Change Request Form) before emailing to Cloud Access: cloudaccess@finance.rutgers.edu**
- If you have any questions about the Finance Approver Change Request Form, please contact cloudaccess@finance.rutgers.edu

DocuSign FMS PowerForms – Instructions and Important Information

1. The Requestor initiates the PowerForm from the Finance Approver Change Request Form link on the UFA website as shown in the screenshot below.

- The form is located at <https://finance.rutgers.edu/resource-library/universitywide/forms-and-templates>
- The requestor (can be an admin, department head, or business manager) initiates the PowerForm from the Forms and templates page under Resource Library, Financial Information System Access Forms, on the UFA website.
- The requestor enters the routing information into the PowerForm signer information box (see example on next page).
- Before starting the form, the requestor must know the names and email addresses of all required persons who are signing. For assistance, see your Supervisor or Unit's Business Manager.
- Each form has two pages. The first page are the instructions on completing the fields on the form. The second page is the actual form to complete.
- Once completed, all parties will receive a final signed copy of the Finance Approver Change Request Form.
- **Once the form is completed with all required signatures, the Requestor should save the form with the requestor's name and name of the form (e.g., Requestor Name- Finance Approver Change Request Form) before emailing to Cloud Access: cloudaccess@finance.rutgers.edu**

The screenshot shows a web browser window with the URL finance.rutgers.edu/resource-library/universitywide/forms-and-templates. The page header includes the Rutgers University logo and navigation links for 'Visit Rutgers.edu', 'Staff Directory', 'News', 'Events', and 'COVID-19 Updates'. A secondary navigation bar lists 'Financial Services', 'Risk Management', 'Student ABC', 'Strategic Initiatives', 'Resource Library' (which is highlighted with a red underline), and 'Inside UFA'. The main content area is titled 'Financial Information System Access Forms' and contains a bulleted list of links:

- [Expense Management](#)
- [Finance Approver Change Form](#) (for expense management and journal entries)
- [General Access Request Form](#)
- [Central Access Request Form](#) (for use by central units and grant accounting only)

2. To begin, the Requestor enters routing information into the PowerForm Signer Information Box

- The requestor must know the names and email addresses of all required persons who are signing before routing the form. For assistance, see your Supervisor or Unit's Business Manager.
- The requestor who will be entering all the required information on the form needs to enter their own name and e-mail address in the fields labeled "Your Name" and "Your Email" as shown in the example on the right.
- The requestor will also enter the names and email addresses of all required signatures including the Business Manager (if required or leave blank), and the Dean, Director, or Department Chair (Class 1, Grade 8 or above; or Class 1, Grade 33S or above) is required and will be verified.

This information must be correct in order for the form to route to everyone.

Once all the names and emails are entered, Click on **Begin Signing** to start the form



PowerForm Signer Information

Fill in the name and email for each signing role listed below. Signers will receive an email inviting them to sign this document.

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

Requestor

Your Name: *

Your Email: *

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

Business Manager (Optional)

Name:

Email:

Dean, Director or Dept. Chair

Name: *

Email: *



BEGIN SIGNING

3. Starting the form

- Please read the Electronic Record and Signature Disclosure document before agreeing to use electronic records and signatures.
- Click the box to agree, then click **CONTINUE**.

Please Review & Act on These Documents



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Please read the [Electronic Records and Signature Disclosure](#).

I agree to use electronic records and signatures.

CONTINUE

OTHER ACTIONS ▾

- After clicking **CONTINUE**, read the instructions preceding the form, then click on **START** to begin filling in the required fields.

Please review the documents below. **FINISH** **OTHER ACTIONS** ▾

START

Submitting the

Rutgers' Financial Management System (FMS)

Finance Approver Change Request Form

This is now a DocuSign Powerform

Processing Time: The Access Team is allowed up to 5 business days to complete processing.
Normal processing time is within 24 hours of receipt.
NO Notification of Completion will be sent.


**** Please Note: Employees listed must already have
Active Working Access to the
Expense Management application or RU GL User role.**

Changing the Finance Approver does not give Employees access to any applications.
If Employees do not have active working access to Expense Management or RU GL User,
please use the Expense Management form or General Access form.

4. Filling in the Fields

- When the requestor has the form open:
 - Complete all required fields outlined in **Red**. The requestor's name will be pre-populated.
 - Enter Employee Full Name, Empl ID, New Finance Approver Name and their Empl ID in each field for all employees whose finance approver has changed.
- Click on **FILL IN** to complete the required fields. You can tab to each field until all information is entered.
- When all the required fields are complete, the **FINISH** tab will appear at the top or at the bottom of the window.
- You will not be able to go back and edit or enter information into the form once you click on **FINISH**.
 - **If you can't complete the form now, see how to finish the form later in steps 12 and 13 at the end of this document.**

Please review the documents below. **FINISH** **OTHER ACTIONS** ▾

 **RUTGERS**

Rutgers' Financial Management System (FMS)
Finance Approver Change Request

NOTE: Changing the Finance Approver does NOT give Employees access to any applications.

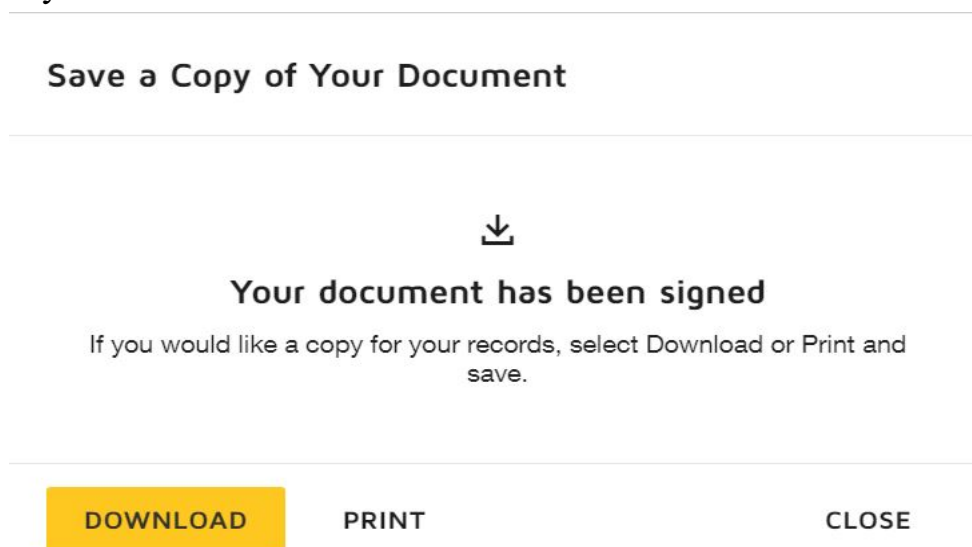
1. Please refer to the full instruction sheet before completing the form.
2. The Requestor's name and email address will automatically be pre-populated.
3. The following must be completed by the Requestor:
 - a. Complete all required fields outlined in **Red** in top part of the form.
 - b. Enter Employee Full Name, Empl ID, New Finance Approver Name and their Empl ID in each field for all employees whose finance approver has changed.
4. The name of the Business Manager (if applicable) and Dean, Director, or Dept Chair will automatically be pre-populated. The NETID and Signature fields need to be entered.
5. DocuSign will automatically email all persons who are required to sign and date the form.
6. Once the form is completed with all required signatures, all signers will receive a copy of the form. The final completed form will automatically be sent to Cloud Access: cloudaccess@finance.rutgers.edu

Requestor Information – ALL Fields are Required.		Effective Date:	<input type="text"/>
Name:	Full Name	Employee ID (8-digits):	<input type="text"/>
Job Title:	<input type="text"/>	UDO #: (Unit) <input type="text"/> (Div) <input type="text"/> (Org) <input type="text"/>	
Unit Name:	<input type="text"/>	Employee Class:	<input type="text"/>
Division Name:	<input type="text"/>	Phone:	<input type="text"/>
Org Name:	<input type="text"/>	Email Address:	<input type="text"/>
Campus Address:	<input type="text"/>	Net ID (in CAPS):	<input type="text"/>

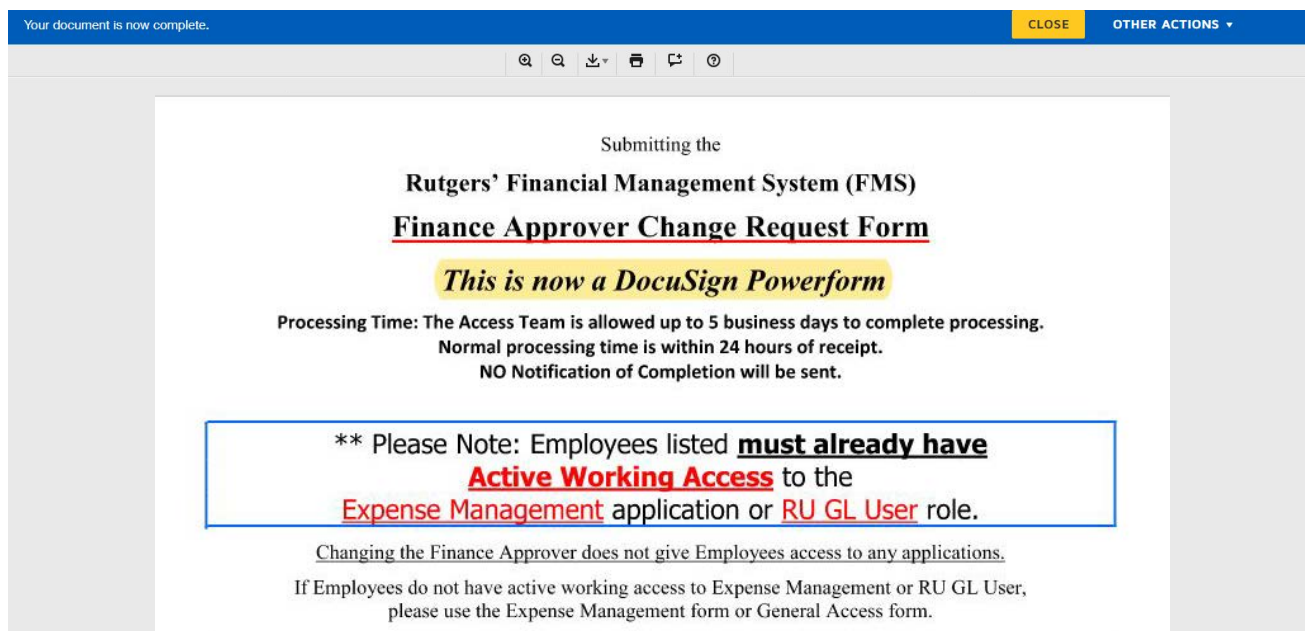
Please Note: Multiple forms will not be accepted. If more than fifteen (15) Finance Approver changes are needed:

5. When the requestor has completed filling in the required fields, click **FINISH**.

- A pop-up screen (shown below) will appear.
- You have the option to download, print, save a copy of the form, or close before it routes to the next signer.
- It is suggested that you save the form.



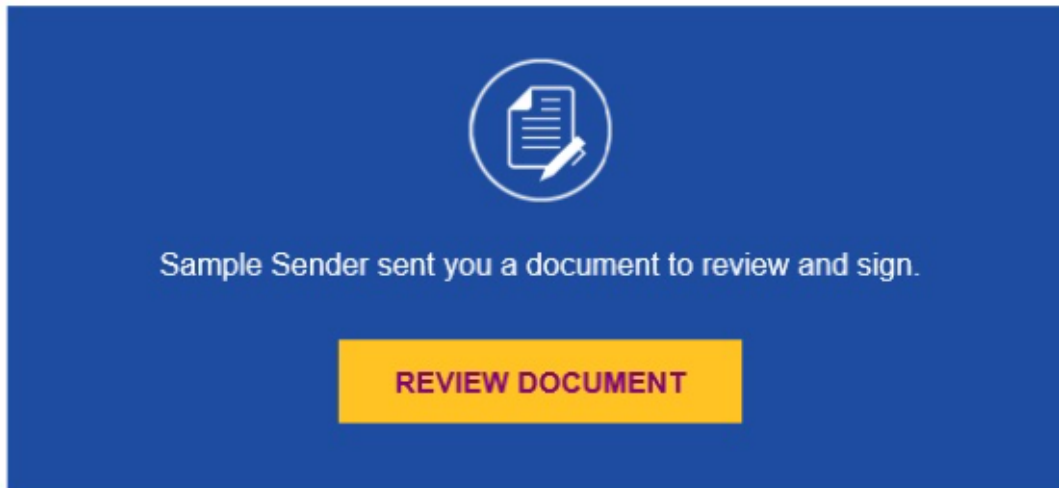
- After closing the pop-up window, another screen will appear showing the document is now complete as shown in top left in screenshot below. You can then close this window. The document will be routed to the first signer.



6. Review Document and Sign

- When the form has been completed, the first signer will receive an email to **REVIEW DOCUMENT** to access the form and complete the signing process as described in Steps 7 and 8.

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7. Beginning the Signing Process

- When you click on **REVIEW DOCUMENT**, the screenshot below will appear.
- Please read the Electronic Record and Signature Disclosure document before agreeing to use electronic records and signatures.
- Click the box to agree, then click **CONTINUE**.

Please Review & Act on These Documents



Powered by **DocuSign**



Please read the [Electronic Records and Signature Disclosure](#).

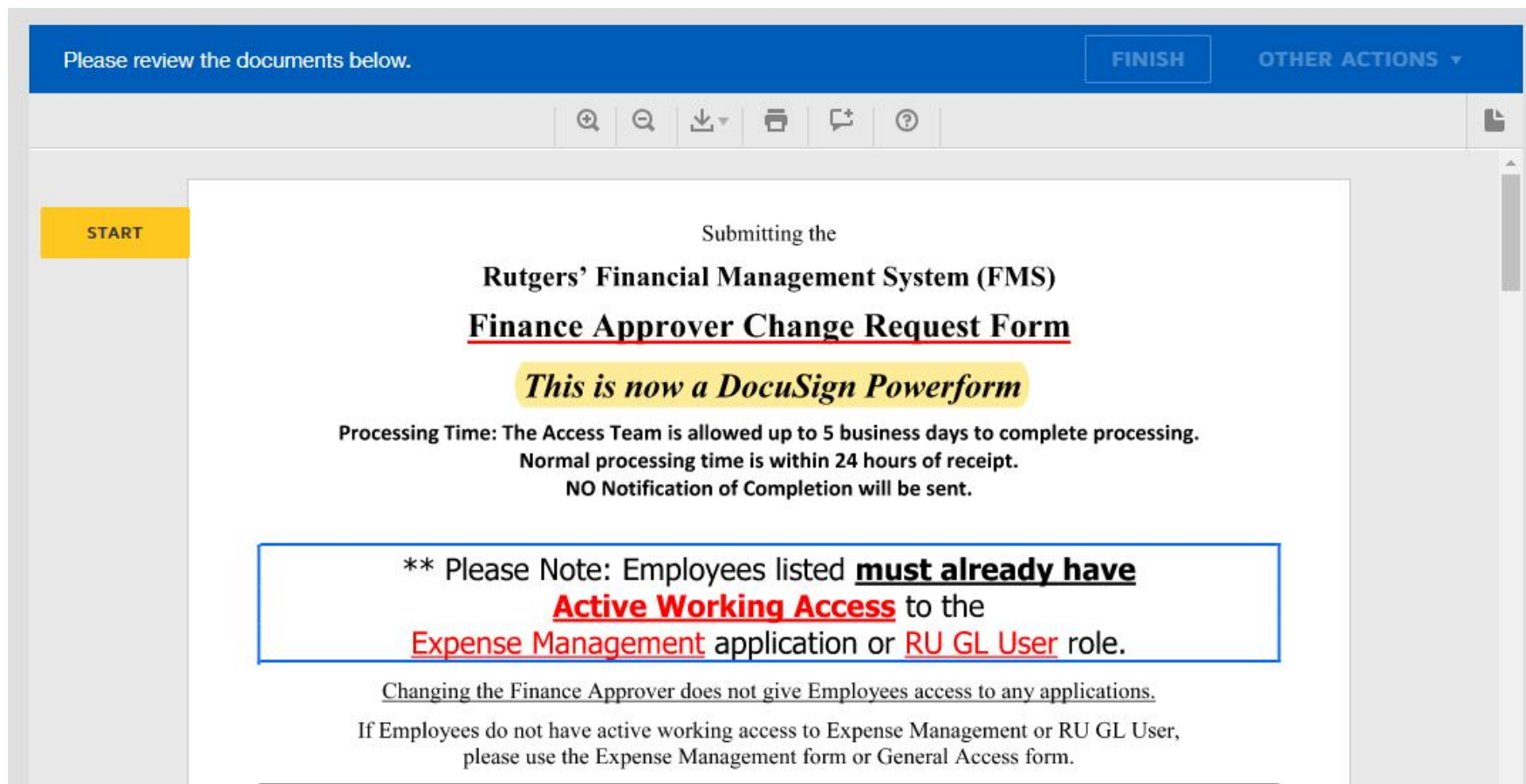
I agree to use electronic records and signatures.

CONTINUE

OTHER ACTIONS ▾

8. The Signing Process continued

- After clicking **CONTINUE** in step 7, the screenshot below will appear.
- After reading the instructions preceding the form, click on **START** to begin filling in the required fields.



Please review the documents below. **FINISH** OTHER ACTIONS ▾

START

Submitting the
Rutgers' Financial Management System (FMS)
Finance Approver Change Request Form

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Processing Time: The Access Team is allowed up to 5 business days to complete processing.
Normal processing time is within 24 hours of receipt.
NO Notification of Completion will be sent.

**** Please Note: Employees listed must already have
Active Working Access to the
Expense Management application or RU GL User role.**

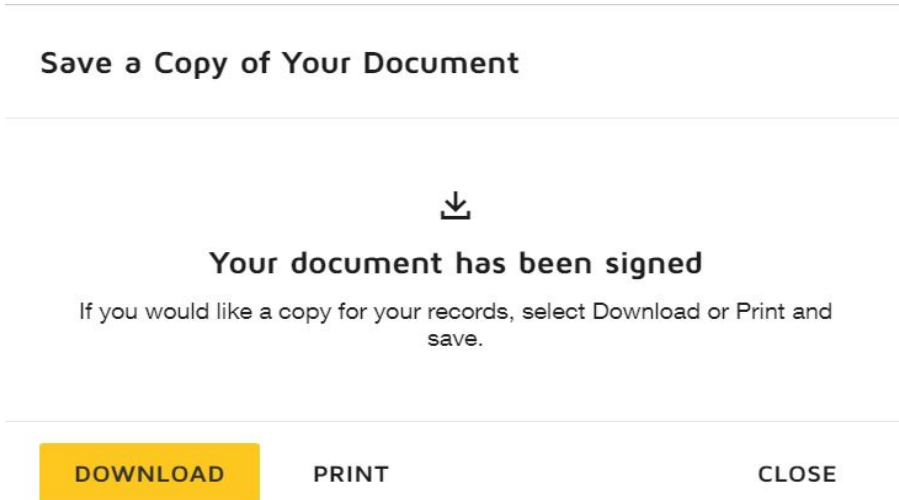
Changing the Finance Approver does not give Employees access to any applications.
If Employees do not have active working access to Expense Management or RU GL User,
please use the Expense Management form or General Access form.

9. Fill-In Required Fields

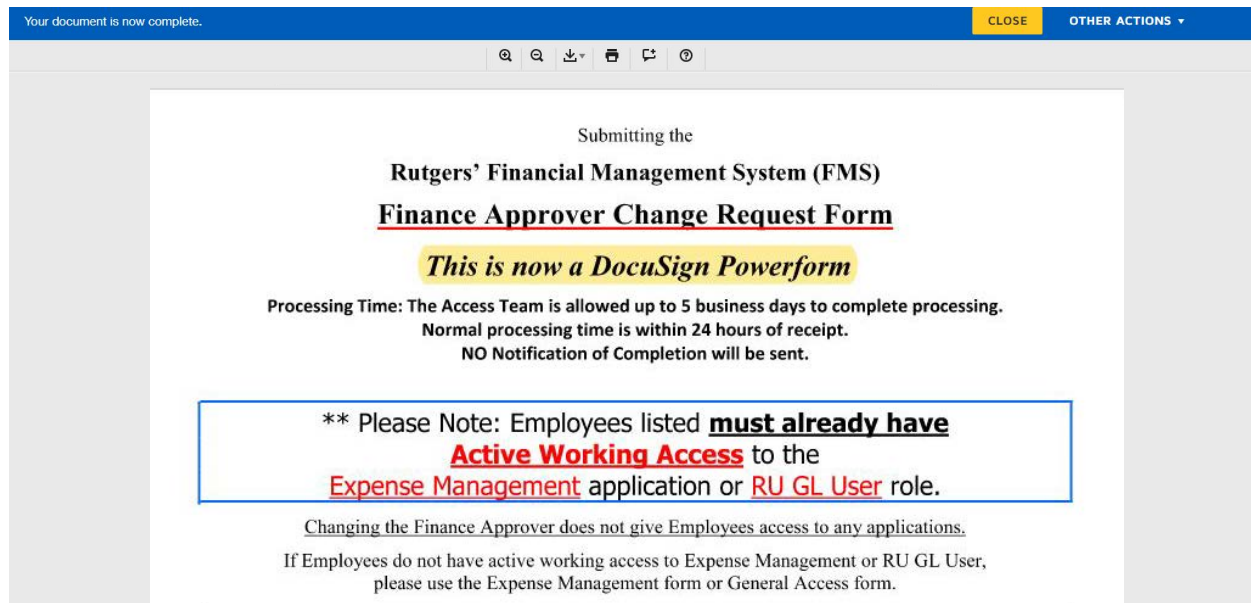
- Click on **FILL IN** to complete the required fields at the bottom of the form.
- The NETID and Signature fields are required. Your Name and Date are pre-populated.
- You can tab to each field until all information is entered.
- When all the required fields are complete, the **FINISH** tab will appear at the top or at the bottom of the window.
- You will not be able to go back and edit or enter information into the form once you click on **FINISH**.

10. When you are done signing, click **FINISH**.

- A pop-up screen (shown below) will appear.
- All parties have the option to download, print, save a copy of the form, or close before it routes to the next signer.
- It is suggested that you save the form.



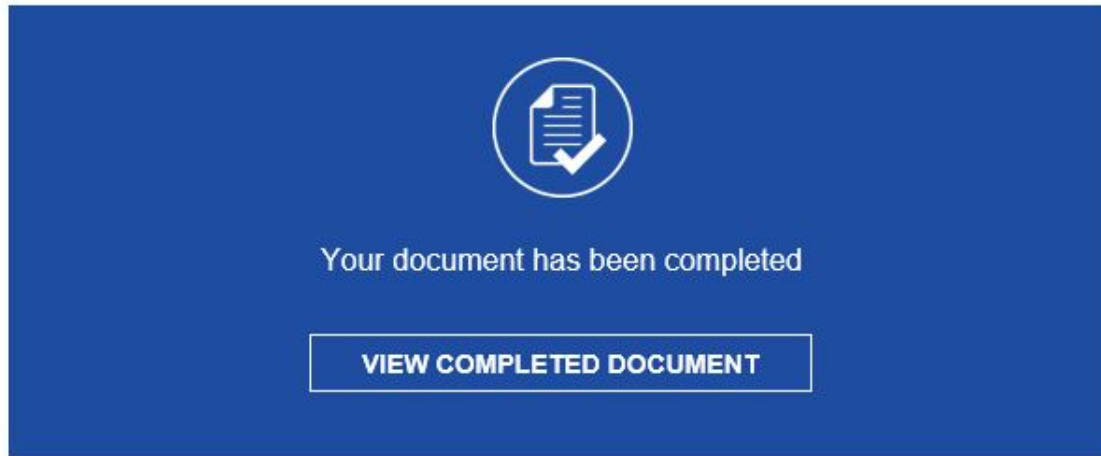
- After closing the pop-up window, another screen will appear showing the document is now complete as shown in top left in screenshot below. You can then close this window. The document will be routed to the next signer if required.



11. Signed and Completed Document.

- When the last signer has completed the form, all parties will receive an email to review the completed document.
- A Completed document will also be an attachment.
- **Once the form is completed with all required signatures, the Requestor should save the form with the requestor's name and name of the form (e.g., Requestor Name- Finance Approver Change) before emailing to Cloud Access: cloudaccess@finance.rutgers.edu**

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12. How to **FINISH** the form **LATER**

- This is an option if you have the PowerForm open and cannot complete it at this time.
- To save information that has been entered so far, click on **OTHER ACTIONS** located at the top or bottom right of the screen.
- Click on **FINISH LATER**. This will close the form. You can only do this if you have not already clicked on **FINISH**.

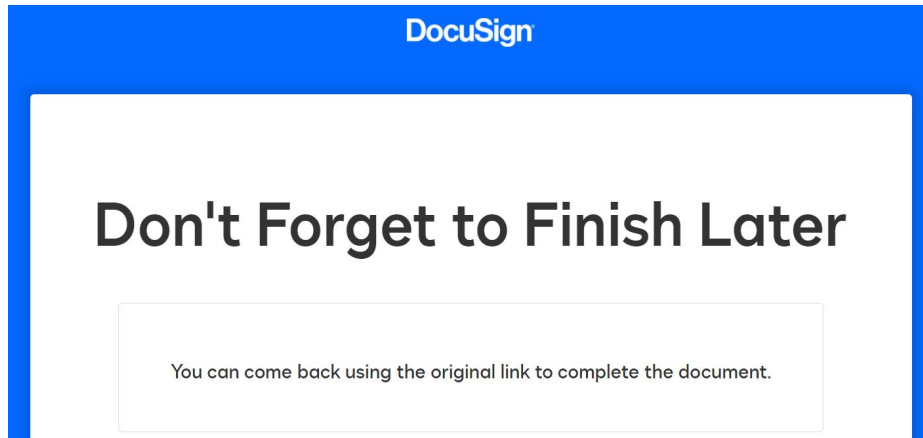
Finish Later

Enter your email to receive a link to finish this document later. Your completed entries will be saved.

Email *

SAVE & CLOSE

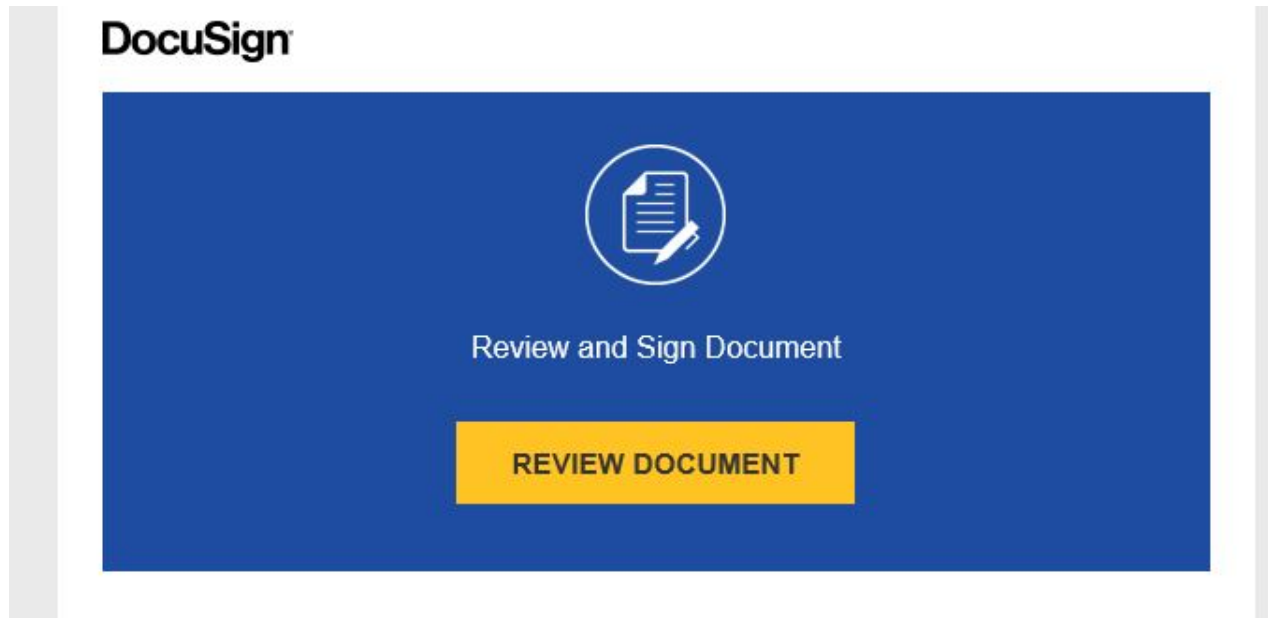
CANCEL



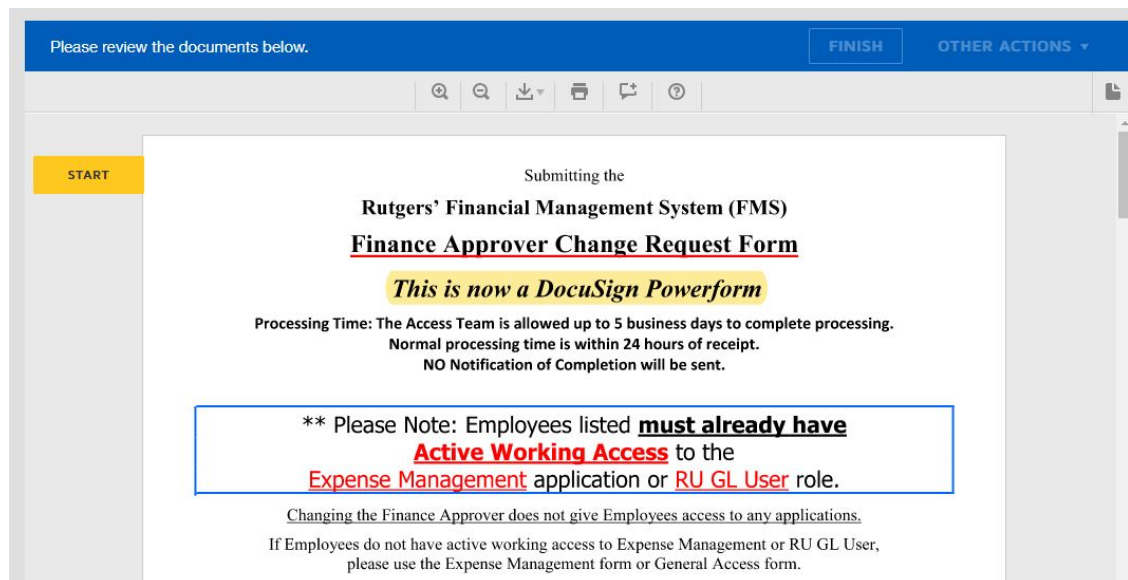
- You will receive an email to re-open the form to complete any required fields and resume the signing process starting with step 6.

13. Resume Completing the document if it was saved.

- If you had saved the form to work on later, open the email you received to review and sign document.



- When you click on "Review Document" it will open up the first page to **CONTINUE**.



14. When you are done signing, click **FINISH.**

- A pop-up screen (shown below) will appear.
- All parties have the option to download, print, save a copy of the form, or close before it routes to the next signer.
- It is suggested that you save the form.

Save a Copy of Your Document



Your document has been signed

If you would like a copy for your records, select Download or Print and save.

DOWNLOAD

PRINT

CLOSE

15. Signed and Completed Document.

- When the last signer has completed the form, all parties will receive an email to review the completed document.
- A Completed document will also be an attachment.
- **Once the form is completed with all required signatures, the Requestor should save the form with the requestor's name and name of the form (e.g., Requestor Name- Finance Approver Change) before emailing to Cloud Access: cloudaccess@finance.rutgers.edu**

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