How to Approve or Reject a p-REQ via Docusign – General Notes:

- A Docusign log-in and password **is not** required to approve/sign, decline/reject a p-REQ.

- You must agree to the Docusign User Agreement to sign the p-REQ.

- Multiple approvals can be requested however the p-REQ is sent to one (1) Approver at a time, starting with the department’s core approvals (i.e. Budget Manager). Special reviews (i.e., Legal, Contracts, Grants, etc.) will be routed last.

- A confirmation email and a completed PDF copy of the p-REQ with signatures will be sent to all Approvers and the requestor.

- If a p-REQ is declined/rejected, the document is immediately cancelled and subsequent Approvers cannot access or view the p-REQ.

- Once a p-REQ is transferred to a purchase order (PO) or cancelled, the p-REQ is closed and cannot be modified.
Approver(s) will receive an email notification.

Please note if the tab feature is used in Google mail, the notification email will be located in the UPDATE tab.
How to Approve A p-REQ Via Docusign - (From a Desktop Computer)

Select ‘View Documents’ or alternately, you can access the p-REQ by visiting docusign.com, clicking the ‘Access Document’ link and use the security code located in the email notification.

Security Code
How to Approve A p-REQ Via Docusign - (From a Desktop Computer)

In a new tab check ‘I agree to use Electronic Records and Signature Disclosure’ and select ‘CONTINUE’.
Scroll to the bottom of the p-REQ and select ‘sign’.
How to Approve A p-REQ Via Docusign – (Desktop Computer)

Select ‘Adopt & Sign’
How to Approve A p-REQ Via Docusign – (Desktop Computer)

Note: After you click on Finish button you will be prompted to log-in to Docusign. This is not required.

Done! Click finish.
To reject the p-REQ, click ‘OTHER ACTIONS’ button. From the pull down menu, select ‘DECLINE TO SIGN’ button.
How to Reject (Decline to Sign) A p-REQ Via Docusign – (Desktop Computer)

A caution notice will pop-up: Declining a p-REQ will void the document and make it inaccessible to other signers. Click continue to decline the p-REQ.

A Decline to Sign response box enables a message to be sent to PAAS. Other signers will not see this message. Click ‘DECLINE TO SIGN’ button one more time. The p-REQ has been declined.
How to Save to Approve/Reject Later:

Click the ‘Finish Later’ button if the approver is not ready to post approval.

To access the document again, return to the e-mail notification and click on the View Documents button.
Approve or Reject from a Smart Phone or Tablet