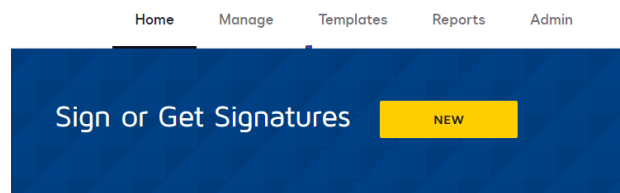
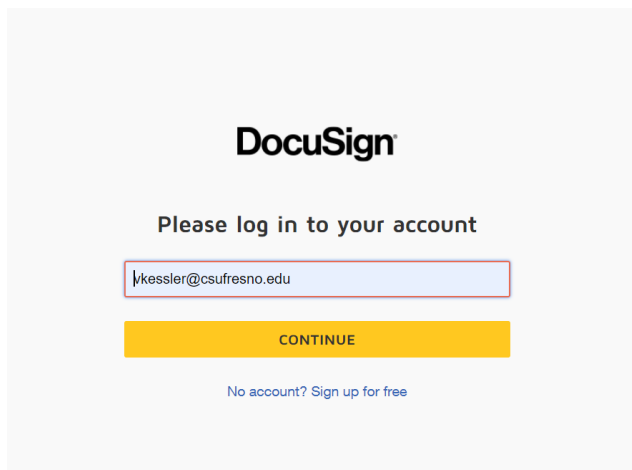
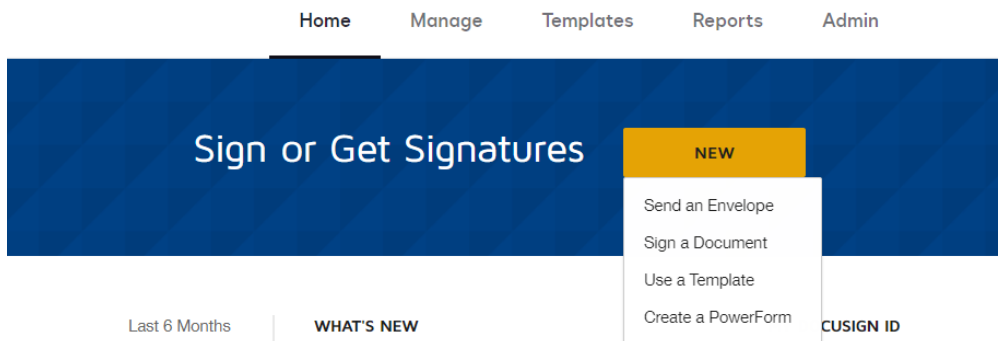


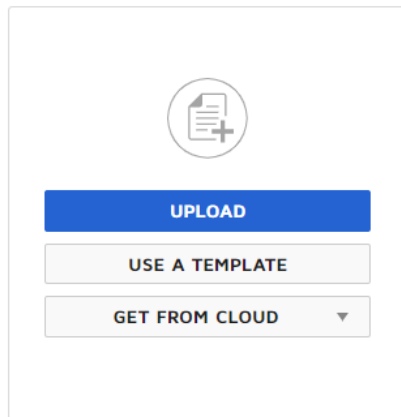
Log into DocuSign <https://account.docusign.com/> with your Fresno State Credentials



Select "New" and "Send" an Envelope



Add Documents to the Envelope

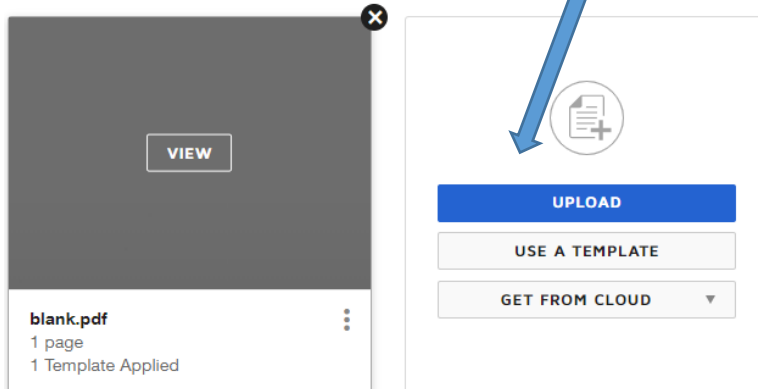


Select "Upload" to select your "Forms" PDF you saved.

Select upload again to add your scanned receipts.

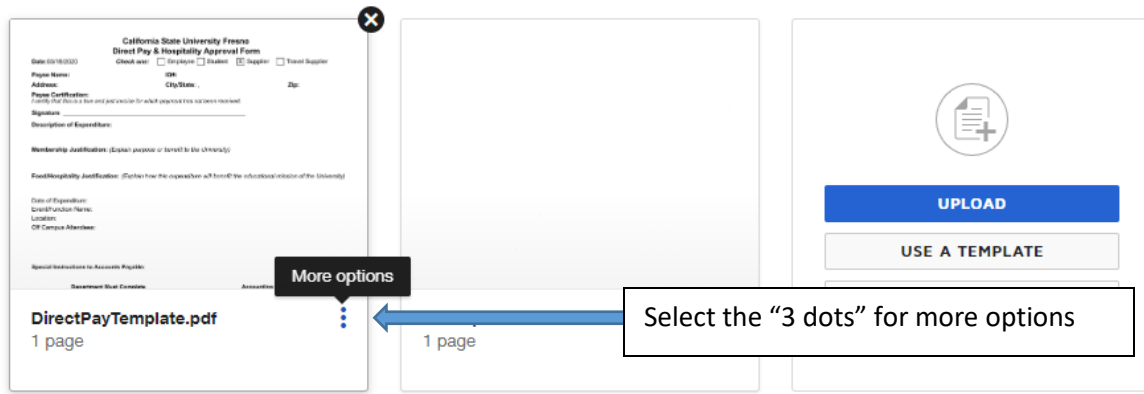
NOTE: When you upload, DocuSign may pop up a template it thinks you need. Disregard it by canceling the pop up window and apply the template per the instructions below.

Add Documents to the Envelope

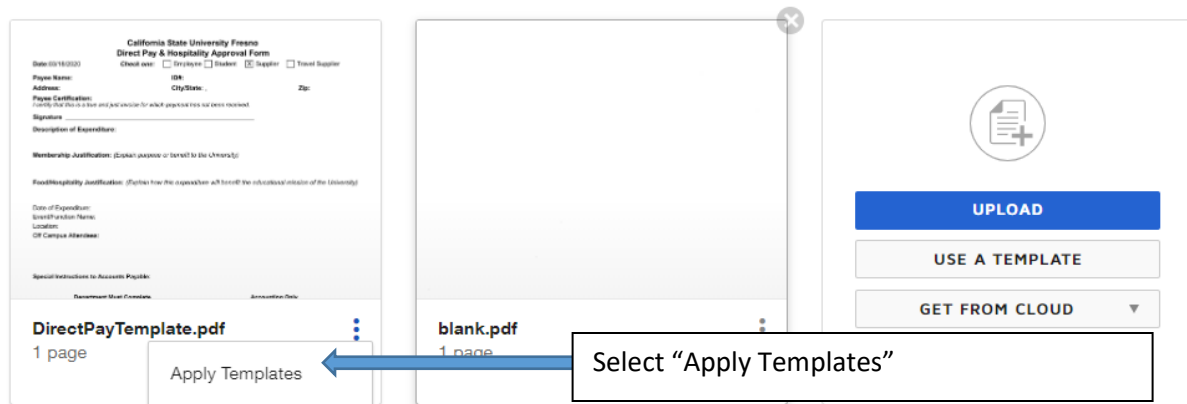


NOTE: If you are uploading **multiple** Direct Pay Forms you must apply the template to each of the pages where you need the approval signatures. Repeat the process below until the template is applied to each signature page.

Add Documents to the Envelope



Add Documents to the Envelope



Add Recipients to the Envelope

As the sender, you can add recipients to the completed envelope. You can add recipients to many people at once. [Import a bulk list.](#)

Apply Templates for DirectPayTemplate.pdf

SUGGESTED **BROWSE** **SELECTED (1)**

1. Select "Browse"

2. Select "Shared Folders"

3. Select "Accounting"

4. Select "Direct Pay" Approval Template

5. Select "Apply Selected"

APPLY SELECTED

Name	Owner	Last Change
<input checked="" type="checkbox"/> Direct Pay Approval Template	Valerie	
<input type="checkbox"/> Invoice Approval - Verify Received - Manager	Valerie Kessler	3/16/2020 12:25:01 pm
<input type="checkbox"/> Invoice Approval - Manager	Valerie Kessler	3/16/2020 12:23:02 pm

The template is designed to represent the signature flow of the **Direct Pay Form**. You can remove any unwanted signature blocks below, by pressing the “X” to remove. (See screen shot at bottom)

Add Recipients to the Envelope

As the sender, you automatically receive a copy of the completed envelope.

[Import a bulk list](#). Send copies of this envelope to many people at once. ⓘ

Set signing order

1 Payee Certification NEEDS TO SIGN MORE

Name *

Email *

2 Approval Signature NEEDS TO SIGN MORE

Name *

Email *

3 Authorized Signature NEEDS TO SIGN MORE

Name *

Email *

4 VP Approval NEEDS TO SIGN MORE

Name *

Email *

5 Accounting NEEDS TO SIGN MORE

Name *

Marie Cunningham

Email *

mariec@csufresno.edu

Enter the Appropriate contact information

4 VP Approval NEEDS TO SIGN MORE

Name *

Email *

Select “X” to remove additional unwanted approval blocks

It is **very important** to enter the **Vendor or Payee name** in the Email Subject field. The approval form will go to a list serve and the accounting technician will download based on that name.

Message to All Recipients

Custom email and language for each recipient

Email Subject*

Please DocuSign: DirectPay VENDOR NAME

Characters remaining: 61

Very important to enter the **Vendor or Payee name**

Email Message

Hello,
Please approve the direct pay for processing.

Characters remaining: 9948

Customize message as needed

SEND NOW **NEXT**

Select "Next" to Review

**California State University Fresno
Direct Pay & Hospitality Approval Form**

Date: 03/18/2020 Check one: Employee Student Supplier Travel Supplier

Payee Name: _____ ID#: _____
 Address: _____ City/State: _____ Zip: _____

Payee Certification:
 I certify that this is a true and just invoice for which payment has not been received.

Signature  _____ Date Signed 

Description of Expenditure:

Membership Justification: (Explain purpose or benefit to the University)

Food/Hospitality Justification: (Explain how this expenditure will benefit the educational mission of the university)

Date of Expenditure:
 Event/Function Name:
 Location:
 Off Campus Attendees:

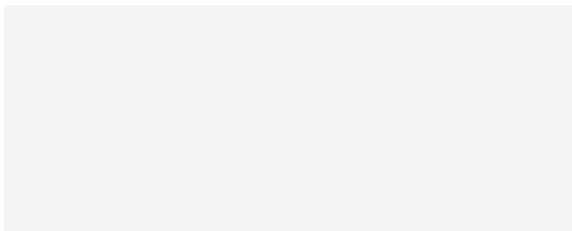
Special Instructions to Accounts Payable:

NOTE: You might need to move and align these fields with your uploaded Direct Pay.

Department Must Complete		Accounting Only	
Contact Person Valerie Kessler	Phone	Group #	Voucher #
Department Name MIS		Payee / Loc#	Invoice Date
Amount .00		Invoice #	
Authorized Name (Print) Full Name	Authorized Signature Sign Full Name	Amount	Due Date
Approval Signature Full Name	Sign Full Name	Use Tax	Corp / 1099
Procurement Signature	Financial Aid (if applicable)	Check Date	Check #
		Comments	

PeopleSoft Chartfields					Amount
Account	Fund	Department	Class	Project	
					.00
					.00

Attach only one invoice per Direct Pay & send to Accounts Payable @ JA 58



Once you Select "Send" the form will be sent to your designated approvers you assigned and then to the Accounting office. You will receive a notification once the document is complete.