OOEF - NEW Docusign process

**Department**
- Prior to an event, dept staff accesses the correct Power Form Template in Docusign
- Dept staff enters their name as the CNS contact (requestor). Must use EID e-mail address to route.
- Dept staff must set first signer aka funding approver - dept authorized signer in GBS (DEFINE). Must use EID e-mail address to route.
- Dept staff completes Power Form and if applicable, uploads attachments.
- Dept staff receives a copy of the request in order to track the status in Docusign. Once completed, Dept staff receives an e-mail in order to access the approved form in order to download it to submit with receipts.
- Process is complete. Dept staff downloads the approved copy and submits with invoice/receipts after event. Don’t forget to complete the bottom section of the form (section 6) when you are submitting the form (section 6).

**Dept funding approver (auth signer)**
- Power Form routes to funding approver. If necessary, funding approver can edit fields before approving forward.
- The editable fields are: Account #, Object code, Purpose of event, Benefit to CNS and University, Justification if they exceed limits.

**Gail Davis, Dean’s delegate**
- Power Form routed to Gail who reviews OOE for completeness and within CNS limits for breakfast/lunch/dinner
- Under $3K - 2 approvals - Dept, Gail
- Once Gail signs, OOE is approved.

**Ricardo Medina, Dean’s delegate**
- Over $3K - 2 approvals - Dept, Ricardo Gail to initial
- Power Form routed to Ricardo if over $3K
- Once Ricardo signs, OOE is approved.