## **ITEM TYPE ACTION FORM**

#### 1. LOG IN

**a.** To get started, log into your DocuSign account by clicking here

# **DocuSign**<sup>\*</sup>

# Log In

Enter email	
lamb@uhcl.edu	
NEXT	

No account? Sign up for free

**b.** Enter your UHCL e-mail as stated in the example. It will direct you to another page to enter credentials.



c. Enter Your UHCL credentials as required and sign in to the DocuSign.

ſ	UHCL
	Enter username (without @uhcl.edu)
	Enter password
	Sign in
	First Time User   Forgot Password

### 2. <u>TEMPLATE</u>

**a.** Go to the Templates Tab.

Home	Manage	Templates	Reports

b. Go to Shared Folders and under that select Item Type Action Form.

	TEMPLATES					
	💄 My Templates	1				
	Shared with M	e				
	All Templates					
	🚖 Favorites					
	Deleted					
	• FOLDERS	+				
	* SHARED FOLDERS	+				
	Item Type Actio	n F				
C.	USE Click on	button to u	se the form	n.		
Name 🔹		Owner 💂	PowerForms	Created Date   +	Last Change ▼	Folders
LI W Item Type Mo Eligible for ma	dification Form New tching	Cindy Lamb		10/20/2022 11:12:07 am	11/2/2022 08:26:40 am	USE

d. Under the Add recipients, enter the recipient's name and email address:

#### Add recipients

1	Initiator Name * Email *	✓ NEEDS TO SIGN ▼	CUSTOMIZE *	î
2	Business Administrator Name *  Email *	✓ NEEDS TO SIGN ∀	CUSTOMIZE ¥	Î
3	Assistant Director of Office for Sponsored Programs. Name * Tarijina Rahman Email * Rahman@uhcl.edu	Z NEEDS TO SIGN V	CUSTOMIZE 🔻	Î

The Initiator will complete the Item Type form. If the Business Administrator is the Initiator they sign under Business Administrator. There is a delete icon on the far right. The Business Administrator can delete the Office of Sponsored Programs recipients if their signature is not needed. If the Office of Sponsored Programs is the Initiator, they fill out the form as initiator, then delete the Business Administrator recipient if the signature is not needed, and sign under Office of Sponsored Programs.

Executive Director of Financial Aid	🖉 NEEDS TO SIGN V CUSTOMIZE V
Name *	
Emeil *	
Accountant III	NEEDS TO SIGN V CUSTOMIZE V
Name *	
Email *	
Director of General Accounting and Financial Reporting	NEEDS TO SIGN V CUSTOMIZE V
Name *	
Name * Mile Bautista	
Name * Mila Bautista Email *	

If the Financial Aid signature is not needed, the Initiator can delete this recipient. Otherwise, Financial Aid is the next signature. The next signature is the Accountant III in General Accounting for review and completion of the form. The form then goes to the Director of General Accounting for signature.

Associate Vice President, Business Operations	🥖 NEEDS TO SIGN 🔻	CUSTOMIZE V
Name *		
Email *		
Director of Student Business Services	🥒 NEEDS TO SIGN 🔻	CUSTOMIZE *
Name *		
Emsil *		
Accountant III	🖉 NEEDS TO SIGN 🔻	CUSTOMIZE V
Name *		
Emeil *		

The form then goes to the AVP of Business Operations for signature. Then the form goes to the Director of Student Business Services for entry into production. Once the Director of SBS signs, the form comes to the Accountant III again for review in production. When the Accountant III signs, the form is complete and everyone gets an email of the completed final copy and the item type is ready for use in production.

Once the Initiator adds their Name and Email, click Send at the bottom right:

ADVANCED EDIT SEN	DV
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The Initiator will receive this screen:

		CONTINUE
Item Type:	Effective Date: 0 4 2 1 2 0 0 3	
Description:	(limited to 30 characters)	
Complets for Add or Modify: GL Interface		
For Term:	For All Terms: select - Vew Cost Center in GL: select - V	
Effective Date:	M M D D Y Y Y Y For General Accounting/Student Business Services Use Only Keywords: 1.	

Click Continue then fill in the form.

Request for Item	Type Action
Item Type: Please visit UHCL's Finance Form	s webpage for instructions for this form.
Create New Item Type	
Modify Item Type	
Set ID: 00797	For GA / SBS Use Only
200080500200	SA System M M D D Y Y Y Y
Item Type: 200080500200	Effective Date: 0 4 2 1 2 0 0 3
Description: Federal SEOG	(limited to 30 characters)
Complete for Add or Modify:	
GL Interface	
For Term: FA22; SP23 For All Terms: Yes	✓ New Cost Center in GL: Yes ✓
M M D D Y Y Y Y	For General Accounting/Student Business Services Use Only
Effective Date: 11/10/2022	Keywords: 1.
DEBIT GL Unit 00759 - ACTUALS	2.
Fund: 5013	3.
Department: C0070	Classification:
Program: H0002	GL Interface Required
Project/Grant: G520129	Default Amount 1098-T Eligible
Account: 55405	Charge Priority List:
Budget Ref:	Payment Overall Priority:
	Refundable Indicator
CREDIT GL Unit 00759 - ACTUALS	Taxable:
Fund: 5013	Priority:
Department: C0070	Pick up Receivable from Charge
Program: H0002	General Accounting/Student Business Services Notes:
Project/Grant: G520129	
Account: 20102	
Budget Ref:	
Process>Set Security after adding new iter	n types.
Now graph nonformance for 52022	
New grant performance for FY2023.	

The radio button lets you choose Create or Modify. Add the item type number if this is an item type modification. Leave the Item Type blank for Creates. Add the description, which must be limited to 30 characters. Enter the terms applicable and if this is a new cost center in GL. Enter a current Effective Date. Enter the debit and credit cost centers with the accounts. Fill in the Budget Reference. The Budget Reference will be blank for Fund 5 cost centers. Fill in the Reason for Item Type Add or Modification box. Click Finish when complete.

Ready to Finish?	FINISH
You've completed the required fields. Review your work, then select <b>FINISH</b> .	

#### 3. SIGNING THE TEMPLATE

#### a. REVIEW THE DOCUSIGN EMAIL-

Open the email and review the message from the sender. Click REVIEW DOCUMENT to begin the signing process.

### b. AGREE TO SIGN ELECTRONICALLY-

Review the consumer disclosure and select the checkbox I agree to use Electronic Records and Signatures. Click CONTINUE.

#### c. START THE SIGNING PROCESS-

- Click the START tag on the left to begin the signing process. You are taken to the first field requiring action.
- Enter all the required fields.
- Click the SIGN tag. You are asked to Adopt Your Signature.

### d. VERIFY YOUR NAME-

Verify that your name and initials are correct. If not, change them as needed.

### e. ADOPT A SIGNATURE-

- Accept the default signature and initial style, or
- Click SELECT STYLE, and select a signature option.

### f. SAVE YOUR SIGNATURE-

Click ADOPT AND SIGN to adopt and save your signature information and return to the document.

### g. CONFIRM SIGNING-

When you finish clicking all signature tags in the document, confirm signing by clicking FINISH.