

ITEM TYPE ACTION FORM

1. LOG IN

- a. To get started, log into your DocuSign account by clicking [here](#)

DocuSign

Log In

lamb@uhcl.edu

Password *

Enter password

LOG IN

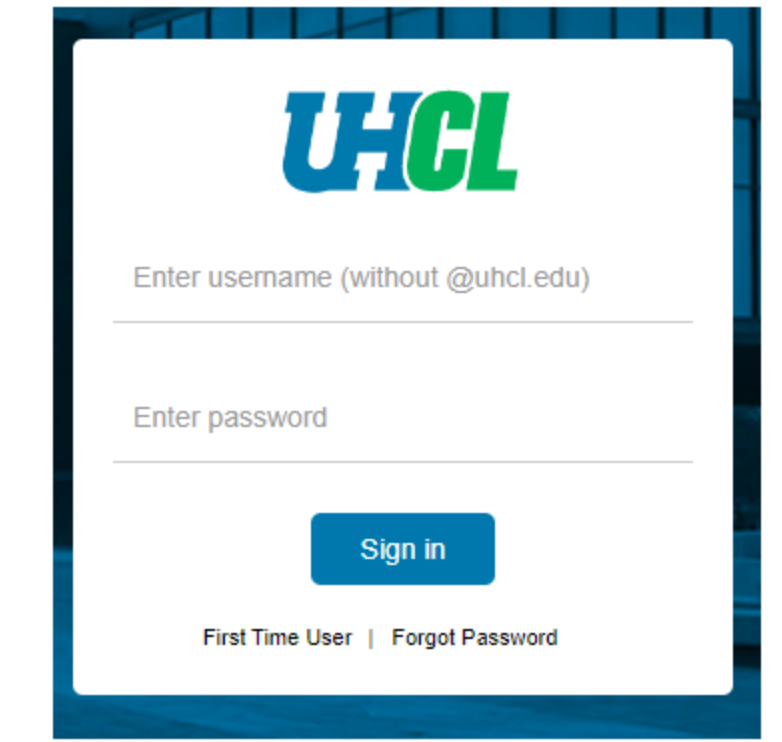
[Forgot password](#) or [Sign in as a different user](#)

USE COMPANY LOGIN

LOG IN WITHOUT PASSWORD

[Learn more about Login Methods](#)

- b. Enter on Use Company Login. It will direct you to another page to enter credentials.
- c. Enter Your UHCL credentials as required and sign in to the DocuSign.

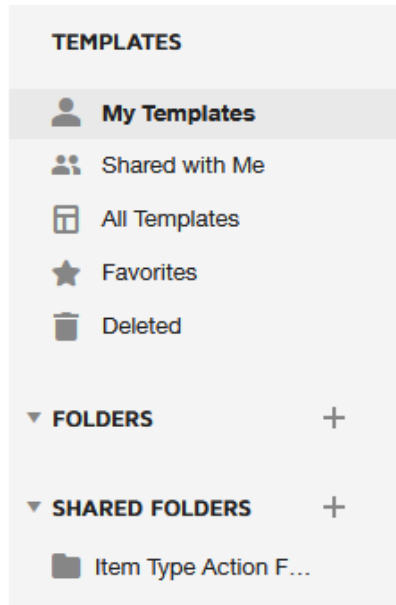


2. TEMPLATE


- a. Go to the Templates Tab.

Home Manage **Templates** Reports

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



c. Click on  button to use the form.

	Name ↕	Owner ↕	PowerForms	Created Date ↕	Last Change ▾	Folders
<input type="checkbox"/> ☆	Item Type Modification Form New Eligible for matching	Cindy Lamb		10/20/2022 11:12:07 am	11/2/2022 08:26:40 am	

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

Add recipients

1	<p>Initiator ✍️ NEEDS TO SIGN ▾ CUSTOMIZE ▾ 🗑️</p> <p>Name * <input type="text"/></p> <p>Email * <input type="text"/></p>
2	<p>Business Administrator ✍️ NEEDS TO SIGN ▾ CUSTOMIZE ▾ 🗑️</p> <p>Name * <input type="text"/></p> <p>Email * <input type="text"/></p>
3	<p>Assistant Director of Office for Sponsored Programs ✍️ NEEDS TO SIGN ▾ CUSTOMIZE ▾ 🗑️</p> <p>Name * <input type="text" value="Tanjina Rahman"/></p> <p>Email * <input type="text" value="Rahman@uhcl.edu"/></p>

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 ▾ CUSTOMIZE ▾ 🗑️

Name *

Email *

Accountant III ✎ NEEDS TO SIGN ▾ CUSTOMIZE ▾

Name *

Email *

Director of General Accounting and Financial Reporting ✎ NEEDS TO SIGN ▾ CUSTOMIZE ▾

Name *

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 ▾

Name *

Email *

Director of Student Business Services ✎ NEEDS TO SIGN ▾ CUSTOMIZE ▾

Name *

Email *


Accountant III ✎ NEEDS TO SIGN ▾ CUSTOMIZE ▾

Name *

Email *

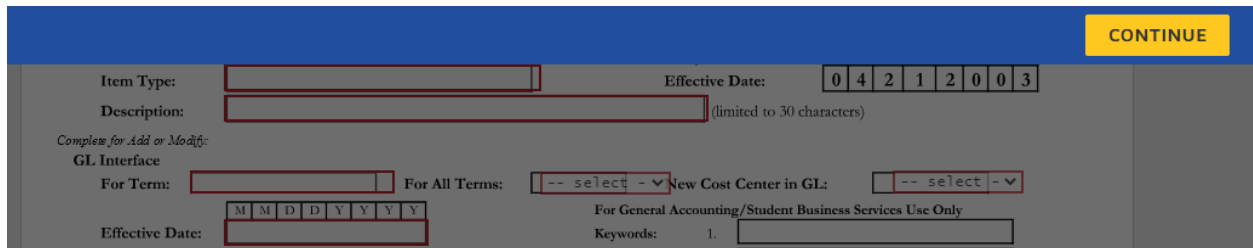
The form then goes to the AVP of Business Operations for signature. Then the form goes to the Director of Student Business Services for entry into production. Once the Director of SBS signs, the form comes to the Accountant III again for review in production. When the Accountant III signs, the form is 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 SEND ▼

The Initiator will receive this screen:



CONTINUE

Item Type: Effective Date: 0 4 2 1 2 0 0 3

Description: (limited to 30 characters)

Completes for Add or Modify:

GL Interface

For Term: For All Terms: -- select -- New Cost Center in GL: -- select --

Effective Date: For General Accounting/Student Business Services Use Only

Keywords: 1.

Click Continue then fill in the form.

Request for Item Type Action

[Please visit UHCL's Finance Forms webpage for instructions for this form.](#)

Item Type:

- Create New Item Type
 Modify Item Type

Set ID: 00797

Item Type:

SA System

For GA / SBS Use Only

Effective Date:

M	M	D	D	Y	Y	Y	Y
0	4	2	1	2	0	0	3

Description: (limited to 30 characters)

Complete for Add or Modify:

GL Interface

For Term: For All Terms: New Cost Center in GL:

Effective Date:

For General Accounting/Student Business Services Use Only

Keywords: 1.
2.
3.

DEBIT GL Unit 00759 - ACTUALS

Fund:
Department:
Program:
Project/Grant:
Account:
Budget Ref:

Classification:

GL Interface Required
Default Amount 1098-T Eligible

Charge Priority List:
Payment Overall Priority:

CREDIT GL Unit 00759 - ACTUALS

Fund:
Department:
Program:
Project/Grant:
Account:
Budget Ref:

Refundable Indicator

Taxable:
Priority:

Pick up Receivable from Charge

General Accounting/Student Business Services Notes:

Run: Setup SACR>Security>Process>Set Security after adding new item types.

Required Item Type Add or Modification:

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?

You've completed the required fields. Review your work, then select **FINISH**.

FINISH

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.