DocuSign eSignature

Home   Manage   **Templates**   Reports

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- 🗑 Deleted

▾ FOLDERS   +

▾ SHARED FOLDERS   +

📁 Business Travel E...

Templates   Elastic Templates

Business Travel Expense Forms

Name ⬍

☐ ☆ **Amherst Exception Form**
Eligible for matching

☐ ☆ **Amherst Exception Form for Spousal Travel**
Eligible for matching

☐ ☆ **Amherst Prior Approval Form for Events and Contributio...**
Eligible for matching

☐ ☆ **Amherst Approval Form for Departmental Employee Re...**
Eligible for matching

Log into DocuSign with your Net ID and Password

Go to Templates and find the BTE folder which is shared with you.

Business Travel Expense Forms-In DocuSign

Job Aid-How to use the templates as a way to have necessary BTE forms completed and tracked in DocuSign

Step 1.)

Find the template that you are seeking in the BTE forms folder click "use." **Do not** click the down

arrow and select one of the other options.

Business Travel Expense Forms

		Name ⇕	Owner ⇕	PowerForms	Created Date ⇕	Last Change ▼	
☐	☆	**Amherst Exception Form** Eligible for matching	Denise Storm		3/8/2023 02:49:44 pm	3/8/2023 02:54:53 pm	USE ▼
☐	☆	**Amherst Exception Form for Spousal Travel** Eligible for matching	Denise Storm		2/14/2023 04:10:25 pm	3/3/2023 12:06:24 pm	USE ▼
☐	☆	**Amherst Prior Approval Form for Events and Contributio...** Eligible for matching	Denise Storm		3/1/2023 04:34:29 pm	3/3/2023 12:05:30 pm	USE ▼
☐	☆	**Amherst Approval Form for Departmental Employee Re...** Eligible for matching	Denise Storm		3/1/2023 04:33:00 pm	3/3/2023 12:05:02 pm	USE ▼

Business Travel Expense Forms-In DocuSign

Job Aid-How to use the templates as a way to have necessary BTE forms completed and tracked in DocuSign

Step 2.) Add recipients (or signers) that are required and delete out any signers that are not required by selecting the trash icon. The trash icon can be found for any recipient which is not required in the upper right-hand corner. Typically, four signers are required: the initiator, employee responsible for the expense, supervisor of the employee responsible for the expense, and the additional approval of Provost, VC, Dean (or delegate) is required. The Principal investigator is required only on Grant funded exceptions.

Add recipients

Some of the recipients are locked and cannot be changed Learn More...

☑ Set signing order   View | Import Bulk List

Initiator (required)   ✎ NEEDS TO SIGN ▾   CUSTOMIZE ▾

Name *

[1]   [_____] 👤

Email *

[_____]

Employee Responsible for Expense (required - may be the same as submitter)   ✎ NEEDS TO SIGN ▾   CUSTOMIZE ▾

Name *

[2]   [_____] 👤

Email *

[_____]

Supervisor of Employee Responsible for Expense (required)   ✎ NEEDS TO SIGN ▾   CUSTOMIZE ▾

Name *

[3]   [_____] 👤

Email *

[_____]

Business Travel Expense Forms-In DocuSign

Job Aid-How to use the templates as a way to have necessary BTE forms completed and tracked in DocuSign

Step 3.) Send Now **Do Not Hit Next!**

Add message

☑ Custom email and language for each recipient

To: Initiator (required)

Email Language *

English (US) ▾

Email Subject *

Business and Travel Expense Exception Request [[Initiator_UserName]]

Characters remaining: 32

Email Message

A Business and Travel Expense Exception Request has been submitted.
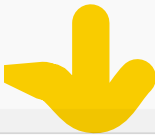
Characters remaining: 9933

To: Employee Responsible for Expense (required - may be the same as submitter)

Email Language *

English (US) ▾

Email Subject *

Action Required: Business and Travel Expense Exception Request

Characters remaining: 38

Email Message

A Business and Travel Expense Exception Request has been submitted requiring your signature.

Characters remaining: 9908

SEND NOW ▾   NEXT

Business Travel Expense Forms-In DocuSign

Job Aid-How to use the templates as a way to have necessary BTE forms completed and tracked in DocuSign

Step 4.) **Sign Now**. As the preparer, you are considered a signer in DocuSign.

After you select sign now, the BTE form will appear on your screen for completion. Hit **Continue** and complete the form and hit **Finish**.

The form will route to the signers, as the preparer you will be able to track the form in your DocuSign account in the manage tab. You will receive an email notice when all signers have signed.

Automatic Reminders will be sent by DocuSign to anyone who has not signed the document within 3 days.

The completed form can be retained with the purchase documentation.