

Subrecipient Invoice Processing-Using DocuSign

The Controller's Office implemented an electronic signature process to expedite the processing of subrecipient invoices effective 7/13/15.

The electronic signature service that UMass Amherst currently uses is DocuSign. By using DocuSign, we have eliminated the need for paper invoices and we have greatly reduced the amount of time it takes to process subrecipient invoices.

OMB Uniform Guidance (UG), effective 12/26/14, requires the payment of federally sponsored subrecipient invoices within 30 days, unless the invoice is improper. While UG applies to federally sponsored subcontracts, it is our goal to ensure timely payment of all subrecipient invoices, regardless of funding source. DocuSign helps our University track these invoices and ensure timely payment. As a part of our Single A-133 audit, subrecipient invoices are tested to ensure that we have the proper controls in place to monitor our subrecipients and ensure timely payment.

An electronic signature -also known as an "e-signature" - is a simple and legally recognized way to approve a digital document. DocuSign automatically generates an audit trail that tracks every step in the signature process-from initial document preparation through signing and archiving. This comprehensive audit trail is stored securely and can be used to know who and when a document is signed.

How this works: An email is sent to you by the DocuSign administrator in the Controller's Office who received the invoice in *rainvoices@admin.umass.edu*. The email will let you know that a document is ready for your signature. You click where indicated and follow the simple instructions. With a few clicks, you can open, review, and sign.

This can be done from any web browser or mobile device, no special software is required. There is no need for you to establish a DocuSign account. Along with the invoice, you will receive a standard memo which provides instructions for department administrators and PI's as to the steps which must be taken in respect to preparing and approving subrecipient invoices as an important step in our subrecipient monitoring process.

The invoice will be set up for review and signature by a department administrator, PI, and Accounts Payable.

Please contact Denise Storm at *dstorm@admin.umass.edu* or 5-7011 if PI delegation of signing authority is necessary for subrecipient invoice(s). A delegation specific to subrecipient invoice approval will be required and maintained. In this case, the Controller's Office will have the subrecipient invoices routed to the delegated individual rather than the PI.

All signers will receive a final signed copy of the invoice by DocuSign.

University policy requires all subrecipient invoices to be received in *rainvoices@admin.umass.edu* and to be approved electronically.

For more information about electronic signatures and DocuSign, go to:

<https://www.umass.edu/it/support/software/docusign-faq>