

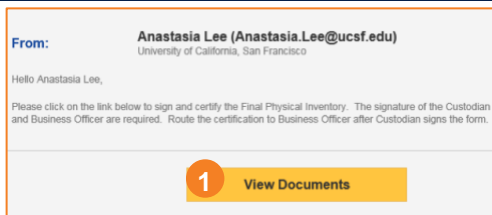
# Completing the Physical Inventory Certification in DocuSign

## for Equipment Custodians

UCSF Capital Equipment & Accounting uses **DocuSign** to send Physical Inventory Certification Forms to Equipment Custodians. Custodians use DocuSign to sign, or “certify,” their forms and forward them to their Manager for approval. For more help using DocuSign, see the [DocuSign homepage](#).

### Opening the DocuSign Envelope

- 1 You will receive an email from the Capital Equipment & Accounting team linking to the **DocuSign** envelope containing your Physical Inventory Certification Form.



Click the **View Documents** button in the email body.

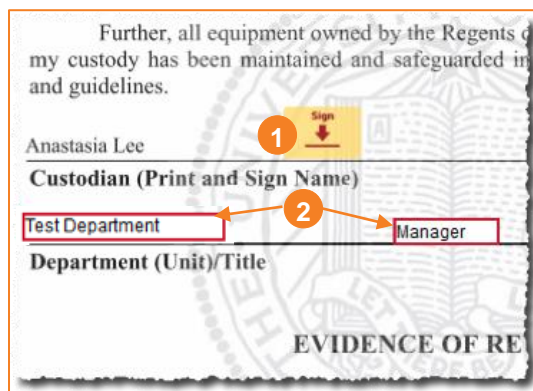
If currently signed into MyAccess, DocuSign will open in a new browser window. Otherwise, sign into MyAccess and DocuSign will open.

- 2 When DocuSign opens, click the **CONTINUE** button in the upper right-hand corner of the homepage



### Signing the Physical Inventory Certification Form

- 1 Review the document carefully, then click the **Sign** tab to populate your electronic signature. Follow the on-screen prompts to set your signature style if this is your first time signing with **DocuSign**.



- 2 Enter your Department name and title in the red boxes provided

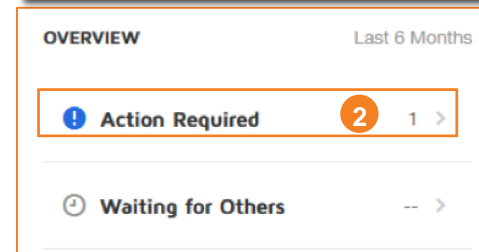
- 3 Click **FINISH** in the upper right-hand corner of the homepage to complete the signing.

### Forwarding your Physical Inventory Certification Form to your Manager

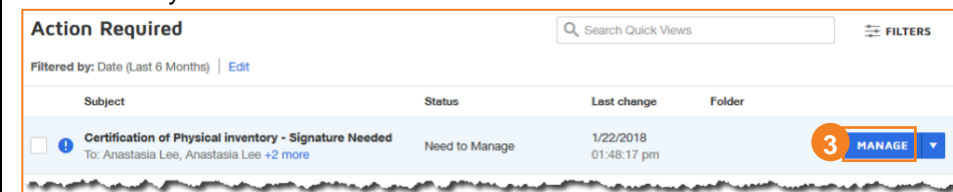
- 1 Click the **Home** tab from the DocuSign toolbar



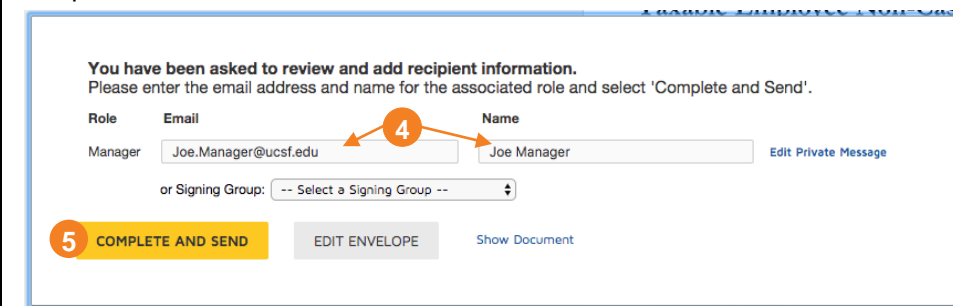
- 2 Select **Action Required** from the **Overview** menu. All DocuSign envelopes requiring your action display.



- 3 Click the **Manage** button to the right of the Certification of Physical Inventory



- 4 A pop-up displays. Enter your Manager's **Email** and **Name** in the fields provided.



- 5 Click **COMPLETE AND SEND**

The document is routed to your Manager, who will complete the signing process as you did in the previous section. All parties will receive a copy of the final signed document.

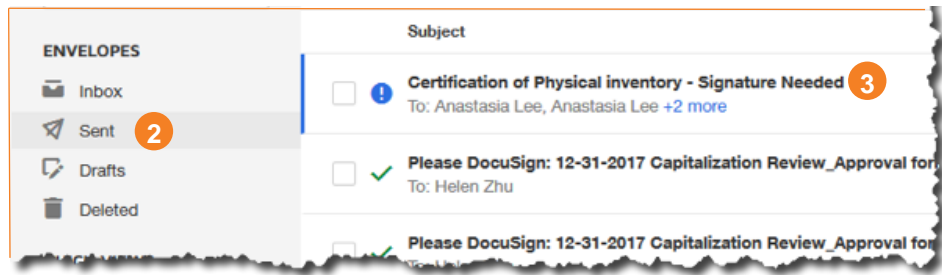
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## for Equipment Custodians

### Resending a Physical Inventory Certification Form

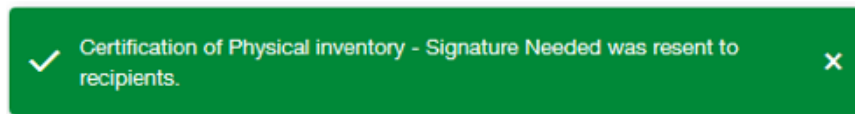
If the **DocuSign** process expires before completion of the signing process, resend the document so the required signers will be re-notified.

- 1 Click the **Manage** tab from the DocuSign homepage



- 2 Click **Sent** from the **ENVELOPES** menu
- 3 Click the **Subject** of the envelope you are resending; the selected envelope displays
- 4 Click the **RESEND** button (not shown)

A green pop-up message displays:



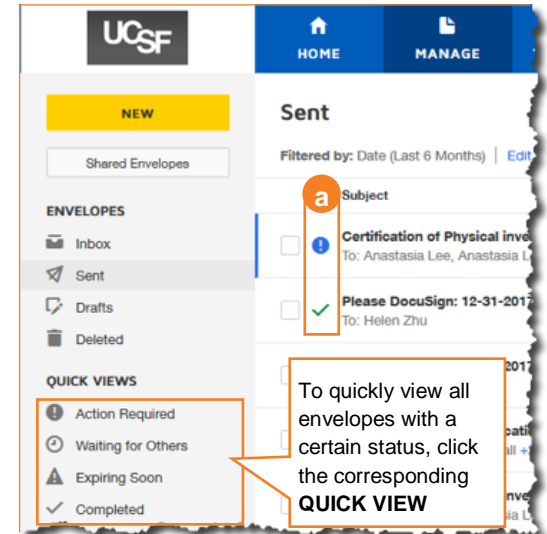
Wait for the box to disappear or click the **X** to dismiss.

### Checking the Status of an Envelope

To check the signature status of a sent envelope:

- 1 Click the **Manage** tab from the DocuSign homepage  
Click **Sent** from the **ENVELOPES** menu  
Icons in front of each **Subject** (a) indicate the current status of an envelope:

- ! Action Required
- ⌚ Waiting for Others
- ⚠ Expiring Soon
- ✓ Completed



To quickly view all envelopes with a certain status, click the corresponding **QUICK VIEW**