DOCUSIGN TRAVEL INSTRUCTIONS

ENTERING TRAVEL REQUESTS

Go to the DocuSign Website: https://docusign.com

Click “LOG IN” and enter the email address and password used when activating account.

Click on the Templates Icon at the top of the page.

The following instructions were completed with the Out-of-State Travel Request–Institutional Funds Only template, but the information/instructions applies to all templates in DocuSign whether the templates is in the Shared Folders or in the All Templates Folder.
On the left side of the screen, select Shared Folders, and then the Travel Requests subfolder. (The travel requests can also be found under the All Templates Folder).

Select the correct Out-of-State/Country Travel Request

Click the “USE” icon to the right of the template.

Type in the name/email (or select the name from the directory icon) for each recipient.

If you are completing the travel request for someone else, enter your name/email in the “Form Originator” field and the name/email of the person traveling in the “Requesting Party” field. If you are completing the travel request for yourself, enter your name/email in both the “Form Originator” and the “Requesting Party” fields.

- If your Vice President (VP) is the VP of Academic Affairs/Provost, enter Michelle Lineweber’s name/email

- If the traveler is the President, Provost, or VP of Research Affairs they will sign as “Requestor” and the VP of Finance will sign as “President or Vice President.”

- If the traveler is the VP of Finance, they will sign as “Requestor” and the President or Provost will sign as “President or Vice President.”

- If you are the traveler and are a direct report to the President or Vice President that will sign the last line of the OSA form (“President or Division Vice President Signature”), then you do NOT need to also add them to sign as the “Supervisor.” When setting up signatures in the OSA, please just remove the Supervisor signature line and have them only sign the line where the President or Vice President signs.
# SDSMT Out-of-State Travel Request - Institutional Funds Only

## Recipients

1. **Form Originator**
   - Name: Anne Langdell
   - Email: anne.langdell@sdsmt.edu

2. **Requesting Party**
   - Name: 
   - Email: 

3. **Supervisor**
   - Name: 
   - Email: 

4. **President or Executive Council Member**
   - Name: 
   - Email: 

5. **Travel Accountant**
   - Name: David Mettler
   - Email: david.mettler@sdsmt.edu

## Message to All Recipients

- Check the box to send a custom email and language for each recipient.

**Please DocuSign: SDSMT Out-of-State Travel Request - In**

## Advanced Options

- Recipients can sign on paper.
- Recipients can change signing responsibility.
- Incomplete envelopes expire after send date.
- Recipients are warned day(s) before request expires.

**Form Originator - Please complete the form and click finish.**

**Attachments can be added.**

**Requesting Party - Attachments may be added.**

**All Others - Please review and sign.**

Send  |  Advanced Edit  |  Discard
Click the “SEND” icon at the bottom of the window.

The below email will be sent to the form originator; select “REVIEW DOCUMENTS” to begin entering the travel request information
Select the “CONTINUE” icon at the top of the page to begin the request (if for any reason you need to leave the request and want to save the data already entered, go to the “OTHER ACTIONS” icon and select the “Finish Later” option).
Tab or click through the report and enter the required information (red boxes are required).

Out-of-State Travel Request

---INSTITUTIONAL FUNDS ONLY---

THIS TRAVEL REQUEST MUST BE FILED IN THE FINANCE OFFICE FIVE DAYS BEFORE THE DATE OF TRAVEL AND MUST BE COMPLETED AND SIGNED BY ALL PARTIES BEFORE PRE-PAYMENT OF AIRFARE OR REGISTRATION(S) CAN OCCUR.

Requester:

Other Personnel Traveling:

Department:

Destination:

Departure Date:

Return Date:

Purpose of Travel (nature of business and interest of the state to justify the cost involved):

Estimated Cost for this Travel: ________________

Please estimate a sufficient dollar amount.

Transportation:
- [ ] Airfare
- [ ] Commercial Air
- [ ] Charter Air
- [ ] Check the box if airfare will be pre-paid by PO
- [ ] Liability Statement for Advance Airfare Purchase: I understand that if I do not travel for any reason other than illness or an event beyond my control, I am responsible for reimbursing the state for any portion of the registration/airfare for which a refund is not obtained. I also understand that in the event that I do not attend the meeting, it is my responsibility to assure a refund of the prepayment.
- [ ] Personal Vehicle
- [ ] State Vehicle
- [ ] Rental Car (Written justification is required when this request is submitted)
- [ ] Other Transportation

Meals:

Lodging:
- [ ] Excess Lodging Requested (Over $175 to a maximum of $275): $__________ (Cost per night without tax)
- [ ] Excess Lodging Approved: $__________ (Executive Council Member’s Initials)

Registration(s):
- [ ] Check the box if registration will be pre-paid by PO or P-Card
- [ ] Liability Statement/Workshop Statement: I understand that if I do not attend the workshop for a reason other than illness or an event beyond my control, I am responsible for reimbursing the state for any portion of the registration/airfare for which a refund is not obtained. I also understand that in the event that I do not attend the meeting, it is my responsibility to assure a refund of the prepayment.
- [ ] Other Expenses (Describe):

Accounts to Charge:

Other Attachments (e.g. Agenda, Registration Form, Flight Itinerary, etc.):

If the Rental Car checkbox is selected, a written justification must be attached using the paper clip icon next to the line.

To add a document

Total Estimated Cost for this Travel: ________________

Approval of Travel

FINISH
To attach a document, click on the paper clip icon, select “Upload,” then click “CONTINUE,” find and select the required file, and select “DONE.”

If processing a Grant funded travel request, you will need to attach the required Grant tracking spreadsheet and the Cognos Grant budget report. Click on the paper clip icon (they will NOT display “Optional” underneath), select “Upload,” then click “CONTINUE.”
find and select the spreadsheet, and select “DONE.” Follow the same steps when attaching the Cognos Grant budget report. If there is also Institutional funding in the same request, you MUST include the **FGIBAVL** for the institutional index(es).

To retrieve the **FGIBAVL** go to Banner and type in **FGIBAVL**

![Welcome](image)

Then put in your index and “70” for account to get operating expenses. The rest will auto-populate.

![Chart](image)

Then select **GO** and take a screen shot of available balance and attach in required spot.
After entering all of the required data, click the “FINISH” icon at the bottom or the top of the template.

Select “NO THANKS” in the pop-up window.

If you are also the “Requestor,” you will receive an email to sign the travel request. Click the “REVIEW DOCUMENTS” icon and then click “SIGN” icon and “FINISH” to send the document on to the next signatory.

The travel request will now flow through the specified recipient order for signatures and a final copy with all signatures and attachments will be sent to your email (and will also be available in DocuSign).
If there is a correction that needs to be made, DO NOT VOID the travel request. Contact OSP and they will work with the DocuSign Administrator (Kharla Vock) to determine if a correction (with documentation) can/should be completed.
Out-of-State Travel Request

—GRANT FUNDS—

THIS TRAVEL REQUEST MUST BE FILED IN THE FINANCE OFFICE FIVE DAYS BEFORE THE DATE OF TRAVEL AND MUST BE COMPLETED AND SIGNED BY ALL PARTIES BEFORE PRE-PAYMENT OF AIRFARE OR REGISTRATION(S) CAN OCCUR.

Requestor: Kharla Vock
Employee: ❌ Student: ✔

Other Personnel Traveling:

Department: Business and Finance Destination: Denver, CO

Departure Date: 11/05/19 Return Date: 11/07/19

Purpose of Travel (nature of business and interest of the state to justify the cost involved):

Training

Estimated Cost for this Travel: (If actual costs exceed this authorized estimate, a revised authorization will need to be obtained per State rules. Please estimate a sufficient dollar amount.)

<table>
<thead>
<tr>
<th>Transportation</th>
<th>Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>Airfare: Commercial Air</td>
<td>☐</td>
</tr>
<tr>
<td>Charter Air</td>
<td>☐</td>
</tr>
<tr>
<td>Check the box if airfare will be pre-paid by PO:</td>
<td>☐</td>
</tr>
<tr>
<td>Liability Statement for Advance Airfare Purchase:</td>
<td>☑</td>
</tr>
<tr>
<td>&quot;I understand that if I do not travel for any reason other than through no fault of my own, that I am responsible for reimbursing SD School of Mines and Technology for any portion of this airline ticket which is non-refundable.&quot;</td>
<td>❌</td>
</tr>
<tr>
<td>Personal Vehicle</td>
<td>☑</td>
</tr>
<tr>
<td>State Vehicle</td>
<td>☑</td>
</tr>
<tr>
<td>Rental Car (Written Justification is required when this request is submitted)</td>
<td>☑</td>
</tr>
<tr>
<td>Other Transportation</td>
<td>☑</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Meal(s):</th>
<th>Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>Excess Lodging Requested (over $175 to a maximum of $275):</td>
<td>☑</td>
</tr>
<tr>
<td>Excess Lodging Approved:</td>
<td>☑</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Registration(s):</th>
<th>Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>Check the box if registration will be pre-paid by PO or P-Card:</td>
<td>☑</td>
</tr>
<tr>
<td>Liability Statement/Meeting Workshop Statement:</td>
<td>☑</td>
</tr>
<tr>
<td>&quot;I understand that if I do not attend the workshop for any reason other than through no fault of my own, that I am responsible for reimbursing the state for any portion of this registration/workshop fee which is non-refundable. I also understand that in the event that I do not attend the meeting, it is my responsibility to secure a refund of the prepaid fees. I also agree to deduct any meals provided by the conference from the reimbursement for the given time period.&quot;</td>
<td>☑</td>
</tr>
<tr>
<td>Registration fee charged to P-Card:</td>
<td>☑</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Other Expenses (Describe):</th>
<th>Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Estimated Cost for this Travel:</td>
<td>$900.00</td>
</tr>
</tbody>
</table>

New total estimated cost is $1,000

Accounts to Charge:

<table>
<thead>
<tr>
<th>Account</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>XXXXXX</td>
<td>$900.00</td>
</tr>
<tr>
<td>YYYY</td>
<td>$1,000</td>
</tr>
</tbody>
</table>

Other Attachments (e.g. Agenda, Registration Form, Flight Itinerary, etc.)

Requestor Signature: Kharla Vock
Supervisor Signature: Kharla Vock
Grant PI Signature: Kharla Vock
Sponsored Programs Signature: Kharla Vock
VP of Research Signature: Kharla Vock
President or Executive Council Member Signature: Kharla Vock

APPROVAL OF TRAVEL

Dates: 10/25/2019 | 1:26:44 PM MDT

In accordance with the provisions of SDCL 3-9-6.2, consent is hereby given for travel as requested in the foregoing application.

*SDCL 3-9-1, 3-9-2, 4-1-4, 30-1-3, Admin Rules 5:01:02, 5:01:03, 3:05:03
CHECK THE STATUS OF A TRAVEL REQUEST

Select the Manage Icon at the top of the screen

Select one of the “Quick Views” options:

Action Required—Displays documents you need to complete

Waiting for Others—Shows where a request is in the signing order

Completed—Lists finalized documents with a copy of the completed document
HOW TO FIND A TEMPLATE

DocuSign “hides” templates that were created 6 months ago or prior to that time.

There are two ways to find/search for a template:

1. Click on the Shared Folder that you wish to search. If you do not see the template you require, click the Filters option at the top right of the page and in the Date filter select “All,” and then click “APPLY.” The template should appear and can be selected for use. If unsuccessful, see #2 below.

2. Click on the All Templates Folder. If you do not see the template you require, click the Filters option at the top right of the page and in the Date filter select “All,” and then click “APPLY.” All templates that have been created will be displayed and can be selected for use.
TRAVEL REQUEST REVISIONS

If a travel request needs to be revised after it has been completed, you will need to print off the approved travel request and write “REVISED” at the top. Make whatever changes are needed and attach a new/current FGIBAVL or Cognos Grant Budget Report for trip funding. The authorizing signatures will then need to initial and date by their original signature. After the authorizing signatures have reviewed and initialed, please submit to Accounts Payable for support for the travel reimbursement.

QUESTIONS

Questions on DocuSign, please contact Kharla Vock at 394-2371, or Kharla.vock@sdsmt.edu.