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.

![DocuSign Login](image1)

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

![DocuSign Templates](image2)

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.”
# SDSMT Out-of-State Travel Request - Institutional Funds Only

## Recipients

<p>| | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Form Originator</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Name</td>
<td><strong>NEEDS TO SIGN</strong></td>
</tr>
<tr>
<td></td>
<td>Anne Langdell</td>
<td><a href="mailto:anne.langdell@sdsm.t.edu">anne.langdell@sdsm.t.edu</a></td>
</tr>
<tr>
<td>2</td>
<td>Requesting Party</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Name</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Email</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Supervisor</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Name</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Email</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>President or Executive Council Member</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Name</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Email</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>Travel Accountant</td>
<td></td>
</tr>
<tr>
<td></td>
<td>David Mettler</td>
<td></td>
</tr>
<tr>
<td></td>
<td><a href="mailto:david.mettler@sdsm.t.edu">david.mettler@sdsm.t.edu</a></td>
<td></td>
</tr>
</tbody>
</table>

## Message to All Recipients

- 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 days after send date
- Recipients are warned day(s) before request expires

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 PAYMENT OF AIRFARE OR REGISTRATION(S) CAN OCCUR.

Requestor: ____________________________
Employee [ ] Student [ ]

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: ____________

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 unforeseen fault of my own, I am responsible for reimbursing our school for any portion of this airfare which is non-refundable.*
- [ ] Personal Vehicle
- [ ] State Vehicle
- [ ] Rental Car (Written justification is required when this request is submitted)
- [ ] Other Transportation

Meal(s):

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 unforeseen fault of my own, I am responsible for reimbursing our school for any portion of this registration/workshop for which is non-refundable.*
- [ ] Other Expenses (Describe): ____________

Total Estimated Cost for this Travel: ____________

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.

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

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

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.
Below is an example of a completed document with signatures, dates and requested changes.

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**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></th>
</tr>
</thead>
<tbody>
<tr>
<td>☐ Airfare: ☐ Commercial Air ☐ Charter Air ☑ Check the box if airfare will be pre-paid by PO</td>
<td></td>
</tr>
<tr>
<td>☑ Excess Lodging Requested (over $175 to a maximum of $275): 200 (Cost per night without tax)</td>
<td></td>
</tr>
<tr>
<td>☑ Excess Lodging Approved: [ ] (Executive Council Member’s Initials)</td>
<td></td>
</tr>
<tr>
<td>☑ Rental Car (Written justification is required when this request is submitted)</td>
<td></td>
</tr>
</tbody>
</table>

Meal(s):

<table>
<thead>
<tr>
<th>Meal(s)</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>☑</td>
<td>200</td>
</tr>
</tbody>
</table>

Lodging:

<table>
<thead>
<tr>
<th>Lodging</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>☑</td>
<td>200</td>
</tr>
</tbody>
</table>

Registration(s):

<table>
<thead>
<tr>
<th>Registration(s)</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>☑</td>
<td>Registration fee charged to $300</td>
</tr>
</tbody>
</table>

Other Expenses (Describe):

<table>
<thead>
<tr>
<th>Other Expenses (Describe)</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>☑</td>
<td>200</td>
</tr>
</tbody>
</table>

Accounts to Charge:

<table>
<thead>
<tr>
<th>Accounts to Charge</th>
<th>Amount charged to</th>
</tr>
</thead>
<tbody>
<tr>
<td>X X X X X X X $</td>
<td>900 $</td>
</tr>
<tr>
<td>X X X X X X X $</td>
<td>1,000 $</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Other Attachments</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>☑</td>
<td></td>
</tr>
</tbody>
</table>

**APPROVAL OF TRAVEL**

Requestor Signature: [ ]  
Date: 10/25/19 1:25:44 PM MDT

Supervisor: [ ]  
Date: 10/25/19 1:39:05 PM MDT

Grant PI Signature: [ ]  
Date: 10/25/19 1:41:50 PM MDT

Sponsored Programs Signature: [ ]  
Date: 10/25/19 1:43:00 PM MDT

VP of Research Signature: [ ]  
Date: 10/25/19 1:43:06 PM MDT

President or Executive Council Member Signature: [ ]  
Date: 10/25/19 1:43:33 PM MDT

In accordance with the provisions of SDCL 3-9-5.2, content is hereby given for travel as requested in the foregoing application.

*SDCL 3-9-1, 3-9-2, 4-1-4, 80R 5:12, 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.

If you have any questions, please contact Kharla Vock at 394-2371 or at Kharla.vock@sdsmt.edu