Guide to Completing, Signing, and Submitting Your Quarterly Invoice Packet in DocuSign

1. Accessing the DocuSign Envelope
- You will receive an email from DocuSign containing a secure link to the invoice packet.
- Click the "**Review Document**" button in the email to open the template in your browser.
- If prompted, agree to the **Electronic Record and Signature Disclosure** to proceed.

2. Understanding the Structure of the Template
The DocuSign template consists of the following documents:
1. **Quarterly Grant Invoice** – Summary of the requested payment.
2. **Quarterly Grantee Financial Expenditure Report** – Detailed breakdown of expenses.
3. **Grant Quarterly Progress Report** – Updates on project activities.
4. **Grant Legislative Progress Report** – Compliance reporting.
5. **Cumulative Grant Progress Report** – Overview of the full grant life.

Each section must be completed directly **within** the DocuSign template to ensure proper processing. Attaching separate expenses/financials spreadsheets in lieu of filling out the DocuSign template will not be accepted for the financial sections.

3. Completing the Invoice & Financial Expenditure Report
- Navigate through the template by clicking "**Next**" to jump to required fields.
- Invoice Section:
  - Enter your Grant Number, Grantee Name, and Invoice Number.
  - Specify the Reporting Period (e.g., Q1 2025).
  - Provide your organization's financial contact details.
- Financial Expenditure Report Section:
  - Manually enter each expense into the corresponding fields.
  - Expense categories include Personnel, Equipment, Supplies, Travel, Other Costs, etc.
  - For each line item, provide:
    - Expense Description
    - Date of Expense (MM/DD/YYYY)
    - Amount ($)

🚨 **Important**:

- **Do not leave required fields blank.**
- **Ensure all values are accurate**, as incorrect or incomplete data may delay payment processing.

For Institutions with Separate Financial Data Entry & Signing Responsibilities
If different staff members are responsible for entering financial data and signing the document, we recommend the following process:
1. The individual responsible for keying in the financial data should complete all required fields but not sign the document.
2. Once all data has been entered, they should click "**Finish Later**" instead of submitting the envelope.
3. The Financial Signer should then be notified that the document is ready for review and signature.
4. The Financial Signer logs into DocuSign, reviews the completed form, and applies their signature.
5. If the signer identifies errors, they can either:
   - Request the preparer to make corrections before signing.
   - Make the corrections themselves.

🚨 **Important: The envelope will not be considered submitted until the designated signer has signed and completed the process in DocuSign.**

4. Completing the Progress Reports
- Type responses directly into the provided text fields for progress updates.
- Ensure responses are clear and concise.

🚨 For responses that exceed the space provided in DocuSign:
- Prepare a separate document with the full response.
- Use the designated attachment upload fields in DocuSign to upload your document.
- Name the document using this format:
  "[Grant Number] – Progress Report – Question #[X]"
  (e.g., "GR123456 – Progress Report – Question #5")
  This ensures that the Department's reviewers can easily match your attachment to the correct question.

5. Signing the DocuSign Packet
Once all required fields are completed:
1. Click the "**Sign**" button in the signature fields assigned to you.
2. Review the completed document for accuracy.
3. Click "**Finish**" to submit the packet.

6. Process for Out-of-Office or Reassignment Situations
🚨 If a designated recipient is out-of-office or has been reassigned, follow these steps:
1. **Before Submission:** If you know in advance that a signer will be unavailable:
   - Contact Research@flhealth.gov to request a reassignment of the envelope to the appropriate staff member.
2. **After the Envelope Has Been Sent:**
   - The current signer can use the "**Assign to Someone Else**" feature in DocuSign to delegate their signing authority to the correct individual.

o If this option is not available, email Research@flhealth.gov immediately with the updated recipient's details.
3. **If the Envelope Has Expired or Needs to Be Voided:**
   o Contact Research@flhealth.gov to request a new envelope be issued to the correct individual.

🚨 **Important: If an envelope is reassigned, the new recipient must ensure that all required data has been properly entered before signing.**

7. Approval & Routing Process
- After submission, the document will automatically route to the next designated signers (e.g., PI, SRO, GM).
- Each recipient will receive an email notification to review and sign.
- Once all required signatures are obtained, the packet is submitted for processing.

🚨 Important Notes:
- **Only submit invoices through DocuSign—other submission methods will not be accepted.**
- **If you need to make changes after submitting, contact Research@flhealth.gov immediately.**

8. Need Help?
For questions or technical issues, please reach out to Research@flhealth.gov or visit the Grant Management Forms and Resources page for additional guidance.
Thank you for your cooperation in streamlining the invoice submission process!