

**Mission:**

To protect, promote and improve the health of all people in Florida through integrated state, county and community efforts.



**Ron DeSantis**  
Governor

**Joseph A. Ladapo, MD, PhD**  
State Surgeon General

**Vision:** To be the Healthiest State in the Nation

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# DocuSign Quarterly Grant Invoice Packet

## Frequently Asked Questions (FAQ)

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### 1. What is the DocuSign Quarterly Grant Invoice Packet?

The DocuSign Quarterly Grant Invoice Packet is a standardized, electronic submission package used to collect all required quarterly grant invoicing and reporting documentation. The packet includes the Quarterly Invoice, Expenditure Totals by Budget Category Report, Quarterly Financial Report, and all required Principal Investigator (PI) Progress Reports (Quarterly, Legislative, and Cumulative). This digital process ensures compliance with reporting requirements and enables automated Department review and processing, resulting in more timely payments.

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### 2. Why was the process transitioned to DocuSign?

As part of the Department's ongoing commitment to operational efficiency and service improvement, the invoice submission process has been fully digitized. The use of DocuSign enhances accuracy, strengthens compliance controls, reduces administrative burden, and expedites payment processing.

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### 3. What happens if I submit invoice documents or Progress Reports outside of DocuSign?

Invoices, Financial Reports and Progress Reports submitted outside of the approved DocuSign system will be rejected and returned without processing and may result in payment delays. All required documentation must be submitted using the official DocuSign template to ensure timely and compliant processing.

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#### **4. Should I attach detailed expense reports and supporting documentation?**

Yes. Supporting documentation is required. While summary totals must be entered in the designated fields, all detailed expense reports, receipts, payroll documentation, travel records, and other required financial records must be uploaded as attachments. Please use the paperclip icons throughout the template to submit supporting materials.

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#### **5. What if my response exceeds the space provided in the form?**

If your response cannot be fully accommodated within the available field:

- Attach a separate document containing your complete response.
  - Upload the file using the paperclip icon.
  - Clearly name the document (e.g., “[Grant Number] – Progress Report – Question #5”).
  - Provide a brief note in the field indicating that a full response is attached.
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#### **6. What should I do if I receive a packet in error?**

If you are not the appropriate recipient:

- Do not complete or sign the document.
  - Use the “Assign to Someone Else” feature in DocuSign to redirect the envelope.
  - If reassignment is not possible, contact [Research@flhealth.gov](mailto:Research@flhealth.gov) immediately to request an update.
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#### **7. What if I need to make corrections after submitting the envelope?**

Once an envelope has been signed and submitted, entries cannot be modified. If an error is identified:

- Contact [Research@flhealth.gov](mailto:Research@flhealth.gov) immediately to request assistance.
  - If the envelope has not yet completed routing, it may be voided and resubmitted in corrected form, when appropriate.
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## **8. What if an assigned signer is unavailable or no longer with the organization?**

If an assigned signer is unavailable:

- **Before submission:** Contact [Research@flhealth.gov](mailto:Research@flhealth.gov) to update recipient information prior to routing.
  - **After submission:** The current recipient may use the “Assign to Someone Else” feature to delegate signing authority.
  - If the envelope is delayed due to signer unavailability, contact [Research@flhealth.gov](mailto:Research@flhealth.gov) for resolution.
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## **9. When is my quarterly invoice due?**

Invoices must be submitted by the deadline specified in Attachment II of your grant agreement. Late submissions may result in delayed payment and may be subject to contractual penalties.

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## **10. How long will it take for the Department of Health to process my invoice?**

Upon submission through DocuSign, complete and compliant invoices are typically processed within five (5) business days. Processing times may vary based on documentation completeness, compliance review, and required internal approvals.

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## **11. How will I know when my invoice has been fully processed?**

Once all required parties have signed the packet, you will receive a DocuSign Certificate of Completion confirming successful execution of the envelope.

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## **12. Can I save my progress and complete the packet later?**

Yes. DocuSign automatically saves your entries as you work, however, we recommend you also click “Finish Later” before exiting the envelope to ensure all entries are saved. You may exit the envelope at any time and return later using the original email link, provided the envelope has not yet been submitted or reassigned.

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### **13. What if I accidentally delete or lose the DocuSign email link?**

If you are unable to locate your original DocuSign notification email, please contact [Research@flhealth.gov](mailto:Research@flhealth.gov). The Department can resend the envelope notification or provide access instructions.

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### **14. Who should I contact if I experience technical issues with DocuSign?**

For technical difficulties related to system access, document loading, or electronic signatures, please contact [Research@flhealth.gov](mailto:Research@flhealth.gov) and provide a brief description of the issue, including screenshots when possible. This will allow for faster troubleshooting and resolution.

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### **15. Can multiple staff members collaborate on completing the packet?**

Yes. Multiple staff members may collaborate internally prior to submission. However, only the designated recipients listed in the DocuSign envelope are authorized to complete and sign the official submission. Internal coordination should occur before final routing.

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### **16. Are electronic signatures legally valid for grant invoicing?**

Yes. DocuSign electronic signatures are legally recognized and compliant with applicable federal and state electronic transaction laws. All electronically signed submissions carry the same legal standing as handwritten signatures.

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### **17. What happens if required attachments are missing?**

Submissions that are incomplete or missing required documentation will be returned for correction and resubmission. This will delay processing and payment. Applicants are responsible for ensuring that all required attachments are included prior to submission.

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### **18. Can I submit revised documents after the invoice has been processed?**

Once an invoice has been fully processed and submitted for payment, revisions are generally not permitted. If exceptional circumstances require a correction, contact [Research@flhealth.gov](mailto:Research@flhealth.gov) immediately for guidance.

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## **19. How do I confirm that my attachments uploaded correctly?**

Before submitting the envelope, review each attachment to ensure files are visible, readable, and correctly associated with the appropriate section. You may click each attachment within DocuSign to verify successful upload.

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## **20. Is there a file size limit for attachments?**

Yes. DocuSign imposes file size limitations. If your documentation exceeds the allowable size, please combine files, compress documents, or contact [Research@flhealth.gov](mailto:Research@flhealth.gov) for assistance with alternative submission options.

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## **21. What file formats are acceptable for attachments?**

Accepted formats include PDF, Excel, Word, and common image files (JPG, PNG). All documents must be clearly legible and professionally formatted.

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## **22. What should I do if financial totals do not match across reports?**

All financial figures must be internally consistent across the Quarterly Invoice, Expenditure Totals Report, and supporting documentation. Discrepancies must be resolved prior to submission. Inconsistent submissions will be returned for correction.

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## **23. Can I view the status of my submission?**

Yes. DocuSign automatically sends email notifications as the envelope progresses through each signing stage. You may also access status updates through your DocuSign account, if applicable.

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## **24. What happens after the Department completes its review?**

After compliance review and internal approval, approved invoices are forwarded to Financial Services for payment processing. Payment timelines may vary based on state financial processing schedules.

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## **25. Are amendments or supplemental invoices allowed?**

Amendments or supplemental submissions are permitted only when authorized under the terms of the grant agreement. Prior written approval from the Department is required before submitting amended documentation.

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## **26. What if my organization changes its authorized signatory?**

Organizations are responsible for promptly notifying the Department of any changes to authorized signatories. Updated authorization documentation must be submitted before future invoices are processed.

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## **27. How long should I retain copies of submitted invoices and supporting documents?**

Grantees must retain all financial and programmatic records in accordance with the record retention requirements specified in their grant agreement and applicable state and federal regulations.

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## **28. What if my organization is audited?**

All submitted documentation must be maintained and made available upon request for audit or compliance review. The Department may request additional records to support reported expenditures.

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## **Need Further Assistance?**

If you need any further assistance, please reach out to us @ [Research@flhealth.gov](mailto:Research@flhealth.gov) or contact your grant manager directly.