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PCard Policy

Should I use a PCard Requisition Form?

Is the Purchase ONE or MORE of the following?
1. Unplanned - not anticipated or known in advance
2. Urgent - compelling or requiring immediate action or attention
3. Non-routine - commonplace tasks, or duties done irregularly or at sporadic intervals (not monthly or standard recurring)

Purchase < $1000?

Purchase amount is between $1000 - $5000?

Is this Purchase for a Student Event?

Is this Purchase for Research, Study Abroad or Facilities Maintenance?
*corresponding card designation required

Requisition Required

Requisition Exception

Requisition Exception

Requisition Required

Requisition Required

Requisition Exception
Logging into DocuSign

- Open Web Browser and navigate to the web page below. This application is currently not behind TechWorks. Use the link below every time or save to your favorites. 
  http://esignature.gatech.edu
- On the eSignature page, click on the DocuSign icon
- On the DocuSign homepage, click Log in to DocuSign in the top right corner
- On the log in page, use your @gatech.edu account. (i.e. mhandley6@gatech.edu)
- Click continue
- On the password page, click the blue button that says Use Company Login
• Sign into Duo like you would going into TechWorks

Enter your GT Account and Password
Login requested by: idp.gatech.edu

GT Account:
mhandley6

Password:

[Hidden Password]

☐ Warn me before logging me into other sites.

LOGIN  clear
• Once you accept the Duo push or press 1 during the call, you should reach the DocuSign landing page

• End Process.
Approving an Envelope

When there is an envelope for you to review, you will receive an email with a link to view and sign the document. Click the link in the email and follow the steps below.

- When you receive the email, click the review document button

  Marissa Handley sent you a document to review and sign.

  REVIEW DOCUMENT

- When the document opens, click continue

  CONTINUE  OTHER ACTIONS

- Review the document. If everything with the purchase is approved, click Sign

  Marissa Handley

  Sign

  DocSigned by: Marissa Handley

  10:34 AM 10/24/14

- Your signature will populate in the field if you have been in the system before, or it will ask you to adopt signature and sign

- Once the signature is populated click Finish
- End Process.
Declining an Envelope

When there is an envelope for you to review, you will receive an email with a link to view and sign the document. If you do not approve of the purchase follow the steps below to Decline the envelope.

- When you receive the email, click the review document button

![Image 108x450 to 556x646]

Marissa Handley sent you a document to review and sign.

[REVIEW DOCUMENT]

- When the document opens, click continue

![Image 108x382 to 382x433]

- Review the document. If there is something about the purchase that is not approved click Other Actions in the top right hand corner of the screen

![Image 108x317 to 250x349]

- Click Decline to Sign

![Image 108x217 to 334x300]

- Finish Later
- Assign to Someone Else
- Decline to Sign
• Click Continue

**Caution**

If you choose to continue, this document will be void and inaccessible to other signers.

To request changes to this document, please select **FINISH LATER** and contact the sender directly with your request.

• Add a reason detailing why the purchase was declined

**Decline to Sign**

Please provide a reason for declining:

500 characters remaining

• Click Decline to Sign

• The document will close and this message will appear

You have declined to sign.

The sender has been notified that you declined to sign.

If you have any questions, contact the sender.

• End process.
Creating a Contact

- Log into DocuSign
- On the landing page, click the profile icon in the top right-hand corner
- Click my preferences
- On the left-hand side of the page, click contacts
- Click add contact
- Fill out the information for the contact and click save. **FYI** If you do not want everyone to see the contact you just created, do not select the Shared Contact option. This must be a Gatech
authorized approver. This document cannot be sent to any unauthorized approvers

- The Company field can be left blank
- End Process.
Changing Time Zones

If you find that your envelopes have the PST time zone on them follow the steps below to change it.

- Log into DocuSign
- On the landing page, click the profile in the top right-hand corner
- Click on My Preferences
- Click on My Preferences
- On the left-hand side of the page, go to Regional Settings
- Under Time and Date, select Specify a Time Zone
- Change it to the Time Zone you are located. For example, I am in Georgia so I selected Eastern Time

**Time and Date**

- Match my computer’s time zone
- Specify a Time Zone

- Click Save
- End Process.