Guide to reroute a form

Welcome student org members! DocuSign allows us to send requests and gather all required signatures electronically. This includes: requesting a reimbursement, a purchase order, or approval of an Event Proposal.
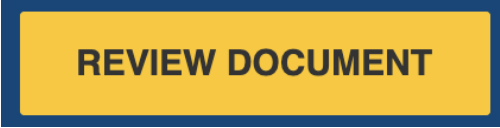Below is a step by step guide to initiate a request in DocuSign and reroute to a signer.

1. Choose the form you will need from the **SOMeCA forms** 📅 Event Proposal Forms 💲 Financial Forms	**2.** Complete all the required fields <u>except</u> for the "Authorized Representative" field Sign ⬇ Authorized Representative:
3. Select "Finish Later" on the top right and "SAVE & CLOSE" **FINISH LATER** **SAVE & CLOSE**	**4.** You will receive an email to "Review Document" which will re-open the document **REVIEW DOCUMENT**
5. Review the required fields to ensure accuracy and select "Other Actions" to "Assign to Someone Else" **FINISH** **OTHER ACTIONS ▼** Finish Later Assign to Someone Else Decline to Sign	**6.** Add the name, email, and a brief message to the Authorized Representative and Assign **New Signer's Name** * New Signer **New Signer's Email** * signer@ucsc.edu