Here are the steps for using the blank PRF Template:

1. You complete the blank PRF form in Excel as you always have, but you leave the signature fields empty. Save this spreadsheet to your computer in a location where you can find it with a name that describes your purchase (example: *PRF to Purchase New Computers.xlsx*).
2. Then you login to DocuSign, click the big yellow button that says **NEW** and choose **Send an Envelope.**
3. Click the blue button that says **UPLOAD** and then upload the Excel spreadsheet you filled out (based on the blank PRF Template).
4. Once it uploads, you'll be prompted to Apply Template, say yes to that.
    - If you aren't prompted to apply the template, you can click the three **vertical dots** to the right of the filename you uploaded. Click those dots and choose **Apply Templates**.
    - Browse to find the **PRF Template (9/27/2019)** and click the box next to it, then click **Apply Selected**.
5. That will create signature fields and some will be blank, requiring you to identify yourself as the **Requestor** and then your **Supervisor** and **Cabinet Supervisor**.
6. The signature fields for Budget Analyst, Controller, Accountant, and CFO will already be filled in.
7. To make this PRF easy to find when you're searching for it, update the Email Subject at the bottom of this page to something relevant to your purchase (example: *Please DocuSign PRF to Purchase New Computers*), then click the yellow **NEXT** button.

When you submit the document you'll be prompted to sign it as the **Requestor**. Go ahead and follow the directions on the screen to do that. Once you do, your Supervisor will get an email notification telling them they need to sign a form in DocuSign.

The 4-minute training video we created that shows these steps is here:

https://docusign.zoom.us/recording/share/hx1G8duw3vWyeSdZUeoSrmUydhqpPfRH0M-B8jpyCx6wIumekTziMw

Please let me know if you have any questions.
— Dave Ayersman