**Guide to Complete SPCC Application Using DocuSign**

1. After clicking on the **SPCC Application** link, follow the instructions below.
2. The requester will enter his or her name and email as the Employee along with the SPCC Approver’s and direct Supervisor’s name and email
3. *Approver – person who will be approving SPCC transactions in the Bank of America Works system. Note: this person must attend in-person SPCC training prior to being given a Works login.*
4. *Supervisor – employee’s direct supervisor. Note: this could be the same or different than the Approver depending on roles and responsibilities within the department.*
5. *Even if the Approver and Supervisor are the same, enter the name and email in both Recipient sections.*
6. The SPCC Program Administrator role will not be edited by the requester.
7. The employee will enter their name in the Employee In Person Signature Line. Note: *Do not edit the Procurement role information as this is used to complete the approval flow*
8. Select “Begin Signing” to begin the SPCC application
9. If applicable, select the check box to agree to DocuSign’s electronic records and signatures and then select the “Continue” button located in the top right of the screen.
10. Complete the applicable fields on the form (red indicates a required field). Please note that the application is two pages, and must be completed in its entirety to move through the approval flow.

*Note: The document cannot be edited once submitted. Please review for accuracy prior to sending and refer to the last page for tips.*

1. Select the “Sign” button. Select the style of signature that best suits and then click “Adopt and Sign” to apply the electronic signature
2. Once all fields are completed, select the “Finish” button. *Please note that* *the Total Estimated Spend and Highest Single Transaction Range per Month section will not be available to the cardholder and must be completed by the Approver.*
3. The SPCC Approver will receive an email from DocuSign stating that there is a document waiting for their approval and signature
4. The Approver will select the “Review Document” link in the email
5. If applicable, select the check box to agree to the DocuSign terms then select the “Continue” button
6. SPCC Approver will review the document for accuracy as well as complete the section regarding SPCC limits and restrictions. Once selected, the Approver will scroll down to the signature line and select the “Sign” icon.
7. Apply the digital signature using the DocuSign signature styles and select “Adopt and Sign” to apply the electronic signature
8. The signature will then be applied to the signature line.
9. Select the Finish button
10. A pop up screen will show to create a “FREE DocuSign account”. Please do not create a DocuSign account, instead select “NO THANKS”
11. The document will now be sent to the SPCC Supervisor for approval.

*Note: if Approver and Supervisor are the same individual, that person will need to sign again as the SPCC Supervisor using the same process* *through DocuSign*

1. The SPCC Supervisor will receive an email from DocuSign stating that there is a document waiting for their approval and signature.
2. SPCC Supervisor will select the “Review Document” link in the email
3. Select the check box to agree to the DocuSign terms then select the “Continue” button
4. SPCC Supervisor will review the document for accuracy and then will scroll down to the signature line and select the “Sign” icon.
5. Apply the digital signature using the DocuSign signature styles and select “Adopt and Sign” to apply the electronic signature
6. The signature will then be applied to the signature line
7. Select the Finish button
8. A pop up screen will show to create a “FREE DocuSign account”. Please do not create a DocuSign account, instead select “NO THANKS”
9. The document will now be sent to the SPCC Program Administrator (PA) for review and approval.
10. The PA will then process the application in the Bank of America Works system, and then will complete the Approved by Program Administrator and Date entered into BOA system sections on the DocuSign form.
11. The completed SPCC Application will then be sent to the Procurement Services inbox to await cardholder training and in-person signature upon completion.
12. Employee will sign the SPCC Application in-person with the PA using DocuSign after Classroom training has been completed.
13. Once all required signatures have been obtained, all associated parties will receive an email from DocuSign stating that the document has been completed and will provide a link to the fully signed/approved document.

**Notes/Tips:**

1. If an approver or supervisor denies to sign at any stage of the approval flow, the document will no longer be valid and unable to be edited. The requestor will have to restart the application process over again, incorporating any applicable corrections into the form. Please review form for accuracy prior to sending to Approver.
2. It is recommended that the requestor save the answers to the questions asked on a separate Word document. This will be useful in case the document is denied, avoiding retyping the answers along with making any corrections needed.