



**MEMORANDUM**

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**Date:** October 9, 2023

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**To:** AMS, DFO, CAO's

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**From:** Sanish Samuel, Controller and Director of Financial Services

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**Re:** **Updates to Guide to Financial Management to Include E-signature and Electronic Document Retention Guidelines**

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Dear Colleagues,

The Guide to Financial Management (GTFM) has recently been updated to include a new section, '[Electronic Signatures and Document Retention for Internal Financial Documents](#)'. The updated version is now available on our website and is applicable from this point forward.

Financial Services began work on the E-Signatures guidelines in April 2023. This involved initial consultations with various stakeholders across the University, including representatives from Divisional Financial Officers, Divisional Business Officers, and Chief Administrative Officers. Our aim was to develop e-signature and document retention guidelines that built on the efficiencies gained during the pandemic.

I am deeply grateful to our community for the rich, detailed feedback you shared in reviewing the draft version that has helped inform the final version of the guidelines. These guidelines will provide an opportunity to standardize expectations and practices related to authorization and document retention of financial records across the University.

**Further Questions and Support:**

As a companion to the updated guidelines, we have created two support resources. Please see the '[How to Guide](#)' for creating and applying E-Signatures and signoffs for financial documents. There is also an [FAQ](#) for the E-Signatures addition to the GTFM available on our website. The FAQ will be updated on a regular basis.

For technical questions about using DocuSign, Adobe Reader, or other non-Microsoft 365 end user computing applications should go [here](#) and select 'End User Computing' to submit a ticket.

Best,  
Sanish Samuel  
Controller & Director Financial Services