



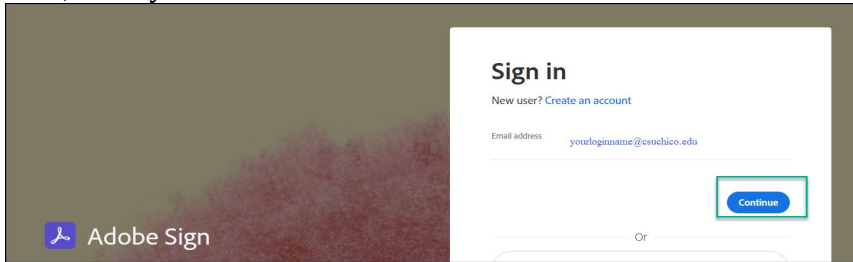
## OVERVIEW

Certain expenditures that support the operational needs of the campus require signature approval. In the electronic realm, appropriate electronic or digital signatures can be used, unless a handwritten signature is explicitly required. Adobe Sign functionality allows for maintaining the integrity of the document to be approved and provides a level of assurance that the authorized/responsible person is approving the document.

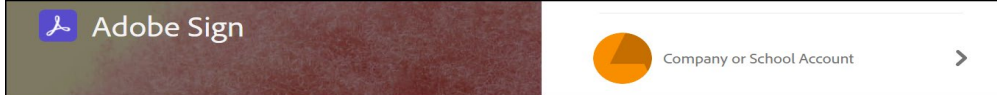
## GETTING STARTED IN ADOBE SIGN

You must be provisioned into the Adobe Sign platform. To complete this step, log a service ticket in [TeamDynamix](#). Once your profile has been created, log in to [Adobe Sign](#).

First, enter your @csuchico.edu email address and click Continue.



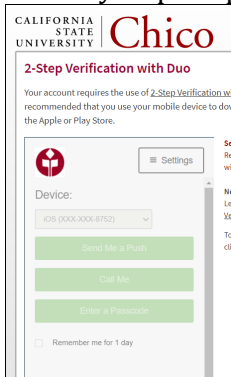
Select Company or School Account



Enter your campus credentials to sign in.

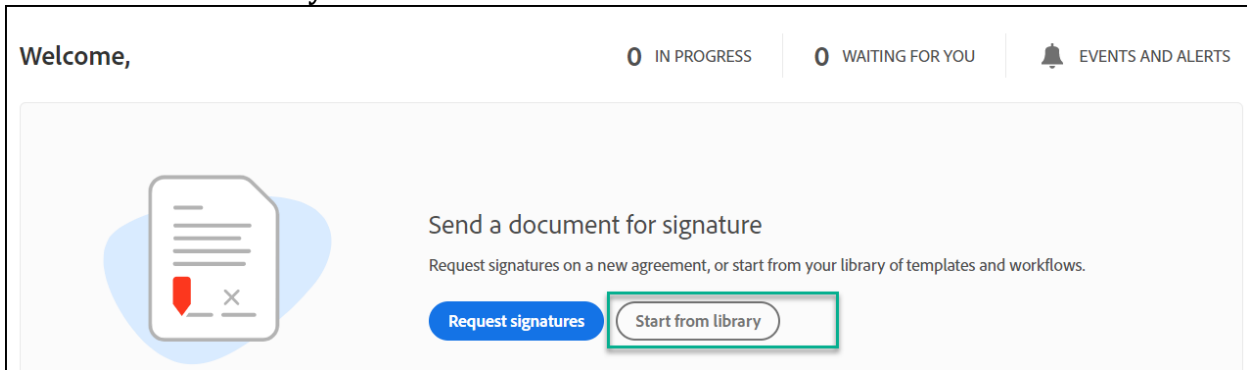


You may be prompted for Duo two step authentication

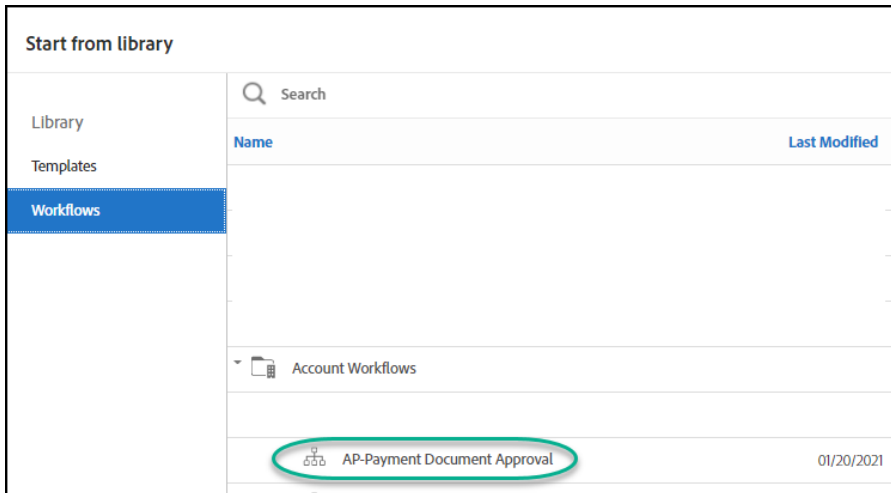


# ROUTING DOCUMENTS FOR APPROVAL

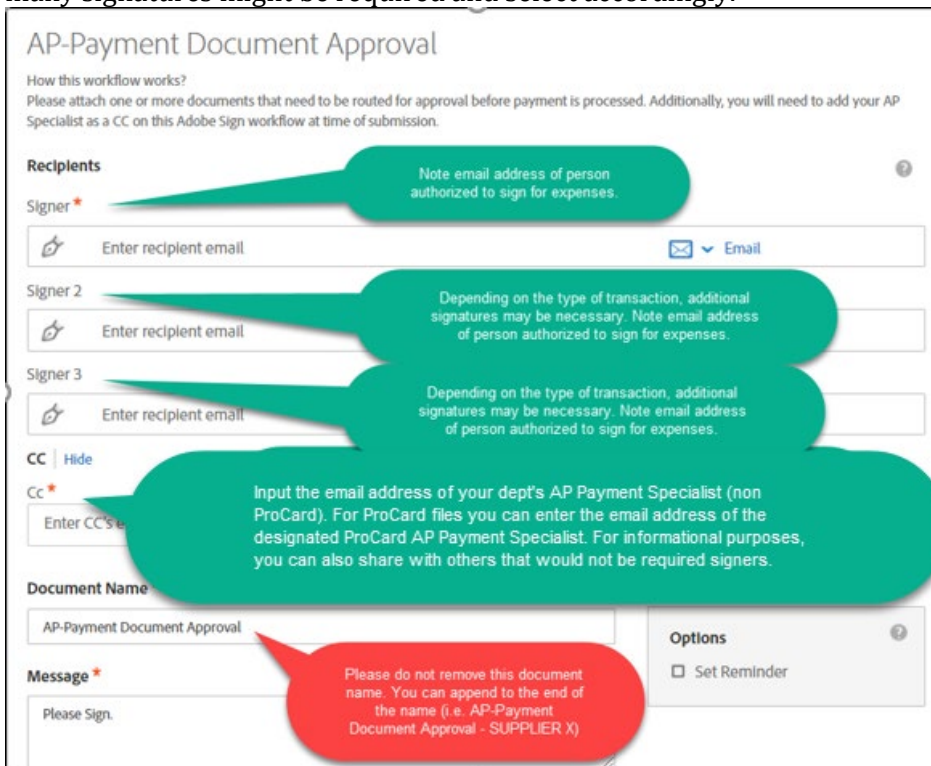
- Select **Start from library** from the main dashboard



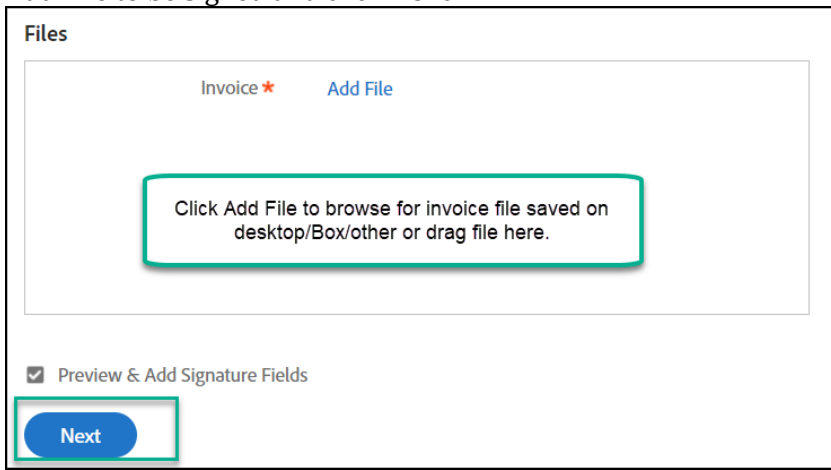
- Select **Workflows** on left hand navigation of pop-up then choose **AP-Payment Document Approval** from list of available workflows.



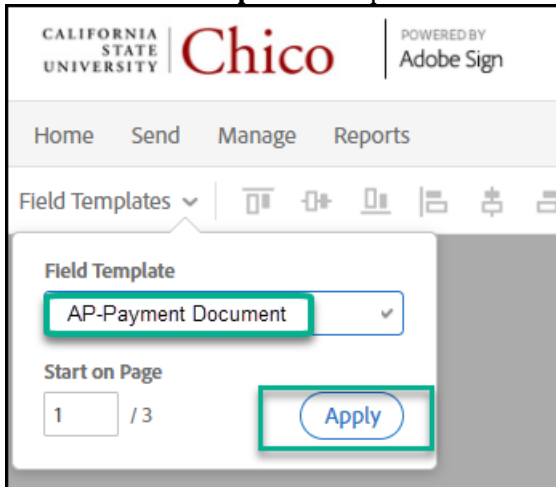
- Click **Start** and complete fields as shown below. Think about the form you are going to be using and how many signatures might be required and select accordingly.



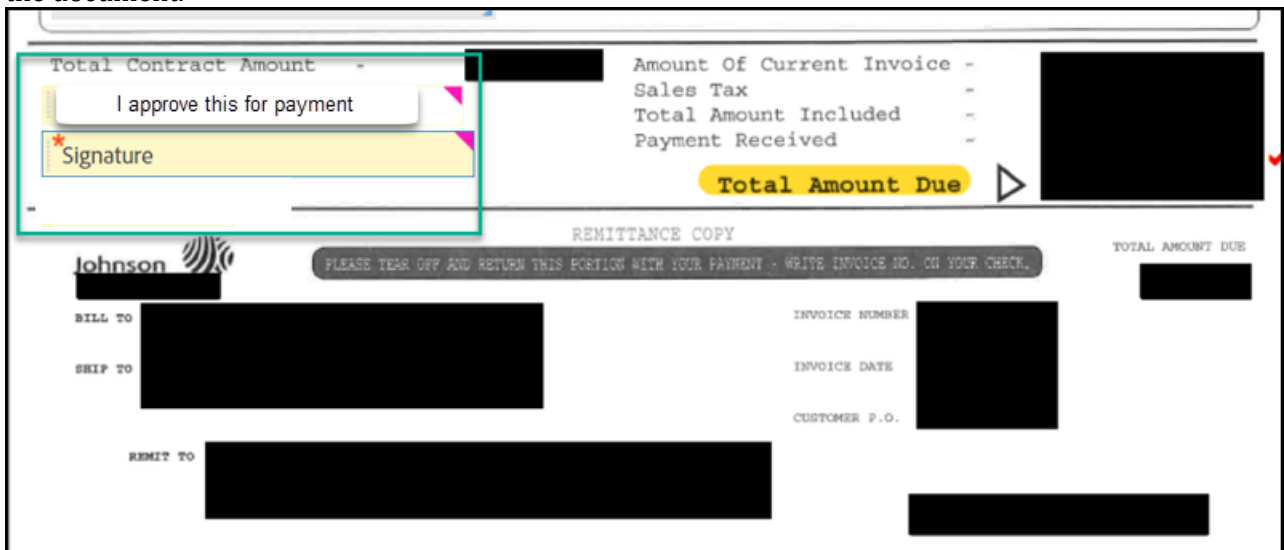
- Add File to be signed and click **Next**



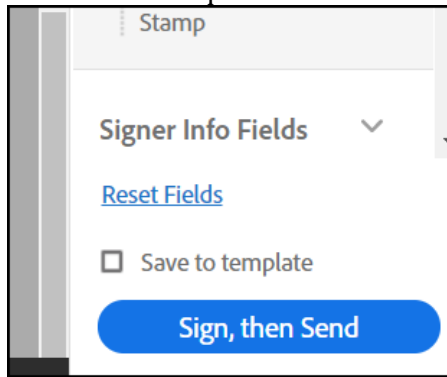
- Choose **Field Templates** dropdown and then select the Field Template named “AP-Payment Document.”



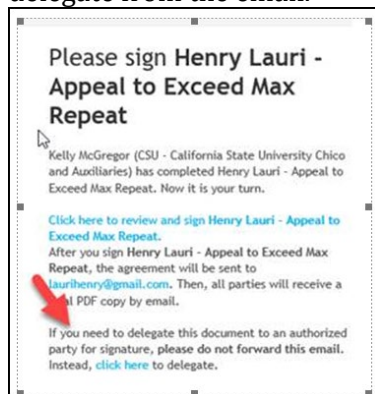
- Move signature block into a place on page that makes the most sense and will not cover up pertinent items on the document.



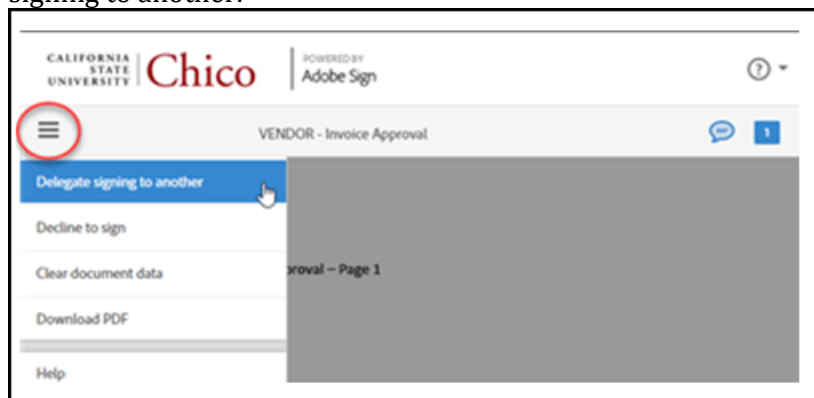
- Select the **Sign, then Send** button on the right hand side to approve and send to the next person in the workflow, as applicable. The next person in line will receive an email notification that they have an item to review in their queue.



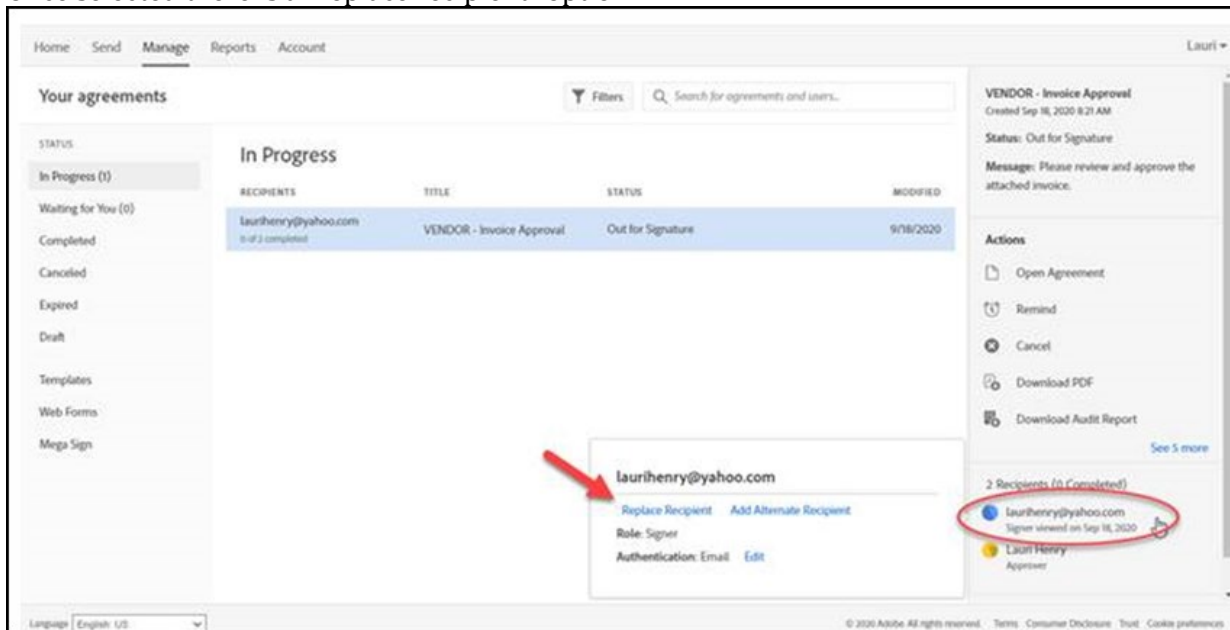
- Your AP team member will receive the final completed document and will process under normal procedures. As is currently the case, when you look at your transaction reports you will see data reflected once the transaction has been processed for payment.
- If by chance a document is routed to an incorrect signer, the document can be re-routed to a delegate. There are a few ways this can be accomplished:
  - If the Signer Delegates
    - When they receive the email notifying them of the item in their queue to sign they can select a delegate from the email.



- Or, they can log in to Adobe Sign, click the “hamburger” in the top left corner and select “delegate signing to another.”



- If the Sender needs to change the Signer
  - While in Adobe Sign, choose Manage then In Progress and select the agreement to hover on the recipient in the bottom right corner.
  - Once selected there is a “replace recipient” option



### MISCELLANEOUS PROCESS NOTES

- All department review/discussion steps need to be completed before a document is sent for approval in Adobe Sign. It is important that an approver is not surprised by the request or is lacking enough information to delay signing of documents. In addition, once signed and sent on to the next step it can be challenging to retract and cease payment processing.
- Your AP Payment Specialist should be CC'd on the submission.
- Consider what document you are routing for approval and get all signers in the workflow (i.e. for employee reimbursement the Procurement Specialist needs to be included).
- Completed documents will not be sent to all signers via email. AP is the source department for these final records. The goal with the email suppression is to eliminate duplication of files throughout campus as well as reduce emails for all involved.

### REFERENCES

- [ICSUAM 8100.S01 Electronic and Digital Signatures](#)
- CSU Chico – Video Playlist
  - [Video – Logging in to Adobe Sign](#)
  - [Video – Adobe Sign Workflow Initiation](#)

**Original Implementation Date:** January 2021

**Revision Dates:** N/A