

CALIFORNIA STATE UNIVERSITY, NORTHRIDGE FOUNDATION

**SIGNATORY AUTHORITY GUIDANCE FOR ADOBE SIGN
FOR DIVISIONS, COLLEGES, DEPARTMENTS, INSTITUTES, CENTERS, AND PROGRAMS**

CSUN Foundation strongly encourages the use of Adobe Sign for all paperwork.

Within Adobe Sign, we only utilize two roles: **Signer and Acceptance**. We do not utilize the Approver role. **Signers sign. Acceptors accept.**

All signatures must always be dated.

As a reminder, an approver cannot sign for an expenditure in which they are a participant.

Given the different forms, we recommend the following naming structure for the agreement name within Adobe Sign document (Form Code followed by Fund followed by a brief description). This will make it easier for both the initiator, signers, and acceptors to find them in the Adobe Sign archives.

Template: **FORM CODE-FUND-INVOICE NUMBER-VENDOR-DESCRIPTION**

Examples:

CHK A1000 108925 IDME Promotions Pens

PURREQ S9300 C2100395 CSUN Chargeback

Form	Code	Payee	First Signer	Second Signer	Foundation Signer	Acceptance
Check Request	CHK	Required for CSUN employees	Department Chair / Program Director / Center Director	Division / College Director of Finance and Operations	Ira Unterman, Chief Financial Officer ira.unterman@csun.edu	Eddie Alvarez, Accounting Technician eddie.alvarez@csun.edu
Purchase Requisition / Chargebacks with AUX Funding	PURREQ		Department Chair / Program Director / Center Director	Division / College Director of Finance and Operations	Ira Unterman, Chief Financial Officer ira.unterman@csun.edu	Eddie Alvarez, Accounting Technician eddie.alvarez@csun.edu
Fund Transfer Request	FNDTFR		Department Chair / Program Director / Center Director	Division / College Director of Finance and Operations	Ira Unterman, Chief Financial Officer ira.unterman@csun.edu	Julie Gastelum, Foundation Accounting Manager julie.gastelum@csun.edu
Scholarship Check Request	SCR		Department Chair / Program Director / Center Director	Division / College Director of Finance and Operations	Ira Unterman, Chief Financial Officer ira.unterman@csun.edu	Eddie Alvarez, Accounting Technician eddie.alvarez@csun.edu
Foundation Credit Card Reconciliation	CCREC	Cardholder (Required)	Direct Supervisor	Division / College Finance Manager	Ira Unterman, Chief Financial Officer ira.unterman@csun.edu	Eddie Alvarez, Accounting Technician eddie.alvarez@csun.edu

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Form	Code	Payee	First Signer	Second Signer	Foundation Signer	Acceptance
Gift-in-Kind Acceptance	GIK		Department Chair / Program Director / Center Director	Dean of the College / Division Vice President	Ira Unterman, Chief Financial Officer ira.unterman@csun.edu	Delia Escobar, Development Data Analyst delia.escobar@csun.edu
Request for Invoice from University	RFI		Department Chair / Program Director / Center Director	Division / College Director of Finance and Operations	Ira Unterman, Chief Financial Officer ira.unterman@csun.edu	Eddie Alvarez, Accounting Technician eddie.alvarez@csun.edu
Transfer of State Funds Request	UNITFR		College Director of Finance and Operations		Ira Unterman, Chief Financial Officer ira.unterman@csun.edu	Barbara Raymond, Financial Services Liaison barbara.raymond@csun.edu

Please copy Justin Cabanting on this transaction (justin.cabanting@csun.edu) - Transfer of State Funds Request

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HOSPITALITY AND EVENT FORMS

		First Signer	Second Signer	Third Signer	
Hospitality and Request for Alcohol Use Form	HOSP	Department Chair / Program Director / Center Director	College Dean	Division Vice President	Justin Cabanting, Administrative Analyst justin.cabanting@csun.edu

Form	Code	First Signer	Second Signer	Third Signer	Foundation Signer	Acceptance
Event Proposal Submission Form	EVENT	Department Chair / Program Director	Division / College Director of Finance and Operations	Division Vice President / College Dean	Ira Unterman, Foundation Chief Financial Officer ira.unterman@csun.edu	Justin Cabanting, Administrative Analyst justin.cabanting@csun.edu

TRAVEL AUTHORIZATIONS AND EXPENSE CLAIMS

Form	Code	Payee	First Signer	Second Signer	Third Signer	Acceptance
Approval of Travel Request (Authorization)	TAUTH	Required for CSUN employees	Employee / Student	Department Chair	College Dean	Eddie Alvarez, Accounting Technician eddie.alvarez@csun.edu

Form	Code	Payee	First Signer	Second Signer	Foundation Signer	Acceptance
Travel Expense Claim	TEC	Required for CSUN employees	Department Chair	Division / College Director of Finance and Operations	Ira Unterman, Chief Financial Officer ira.unterman@csun.edu	Eddie Alvarez, Accounting Technician eddie.alvarez@csun.edu

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SERVICE PROVIDERS

				First Signer	Second Signer	Third Signer	Acceptance
Guest Performer / Lecturer / Service Provider (Before Services are rendered)	SERV			Department Chair (Before Services are rendered)	Guest Performer / Service Provider (Before Services are rendered)	Not Applicable	Not Applicable

Fund Manager retains form until services have been performed.

				First Signer	Second Signer	Foundation Signer	
Guest Performer / Lecturer / Service Provider (After Services are rendered)	SERV			Department Chair	College Director of Finance and Operations	Ira Unterman, Foundation CFO ira.unterman@csun.edu	Eddie Alvarez, Accounting Technician eddie.alvarez@csun.edu

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The screenshot shows the Adobe Sign 'Recipients' configuration page. It features a list of five recipients, each with a role icon (pen for signers, envelope for acceptors) and an email address field. The first three recipients are circled in red and labeled 'SIGNERS' with a blue arrow pointing to them. The fourth recipient is circled in red and labeled 'ACCEPTOR' with a blue arrow pointing to them. The fifth recipient is a text input field labeled 'Enter recipient email'. Below the list are sections for 'Message*' (containing a sample message about a reimbursement form) and 'Files*' (with a 'Drag & Drop Files Here' area). To the right, an 'Options' panel includes checkboxes for 'Password Protect' and 'Completion Deadline', and a 'Recipients' Language' dropdown set to 'English: US'.

ADDITIONAL NOTE

All signatures must be dated using the Signer Info Field for "Date."

The use of this method automatically dates the signature when affixed.

Signer Info Fields

- Title
- Company
- Name
- Email
- Date**