CSUN | CALIFORNIA STATE UNIVERSITY NORTHRIDGE

Financial Services

ADOBE SIGN GUIDE
AUTHORIZED SIGNATURE FORM

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INTRODUCTION

The Authorized Signature Form is available as a workflow in AdobeSign. Two forms are available: 1) New Signers/Renewals and 2) Removals. This guide is designed to provide instruction on how to access and complete the workflow in AdobeSign. To access the workflow, a user must have Sender access in Adobe Sign. If you do not have Sender access, please contact the IT Help Center.

All signatures on the form must be the true facsimile (exact image) of the approver's actual signature. This can be done using a smartphone or tablet. The application cannot be approved using the predefined signature font. For help setting up a permanent electronic signature that is stored in AdobeSign for later use (not Adobe DC or Adobe Pro), please contact the IT Help Center.
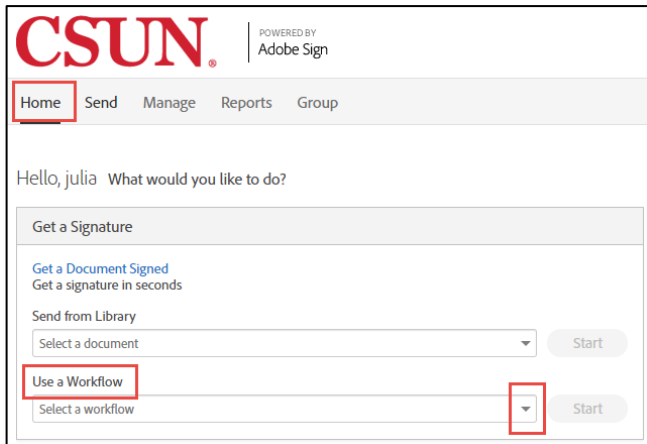
LOGGING IN TO ADOBE SIGN

Using your CSUN email address and password, log in to Adobe Sign at: https://secure.echosign.com/public/login.

WHO DO I CONTACT FOR HELP?

Create a Service Request to Solar Financials or email solarfin@csun.edu. For immediate assistance contact SOLAR Financials by phone (818) 677-6685.

ACCESSING THE WORKFLOW

1. From **Home** dashboard, select the **Use a Workflow** dropdown menu.
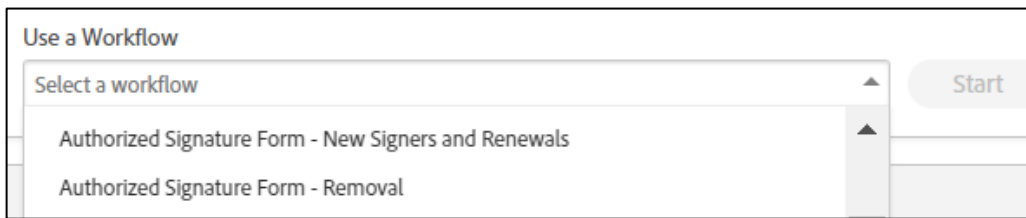
2. There are two Authorized Signature Forms: 1) **Authorized Signature Form - New Signers and Renewals** and 2) **Authorized Signature Form - Removal.**
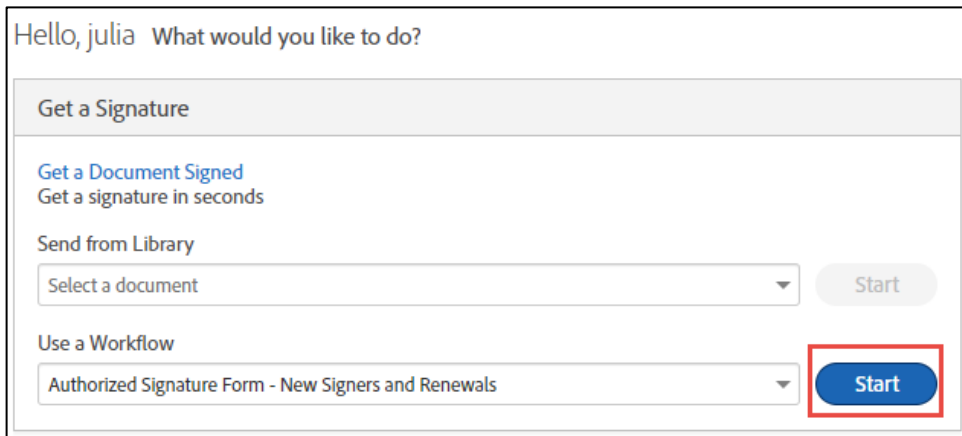
   Select the appropriate option.

3. Select the Start button to the right of the dropdown menu.

4. Under the **Send** dashboard, read all the instructions for the workflow, select more to view all.

5. Complete the **Recipients** section according to the workflow selected.

    • '**New/Renewal Authorized Signer**' is the person who has signature authority. This is **NOT** required for '**Authorized Signature Form – Removals**'.
    • 'Authorized by' is the Financial Manager or Dean. This form must be authorized by a person at a higher level than the signatory's position within the organization. Supervisors and Managers are not allowed to approve their own signature authorization.
    • Financial Services approval is not editable.

6. The **Files** cannot be edited. The Authorized Signature Form is attached and required. Select the **Send** button to begin filling out the application.

    Note: Selecting Send will not initiate the approval workflow, it will launch the fillable application.

7. **Complete the Authorized Signature Form and submit, all fields have been assigned to the appropriate recipient.**