CSUN | CALIFORNIA STATE UNIVERSITY NORTHRIDGE

Finance & Trust Accounting

# ADOBE SIGN GUIDE
# STATE TRUST ACCOUNT APPLICATION

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## INTRODUCTION

The State Trust Account Application is available as a Workflow in AdobeSign. 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 application 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

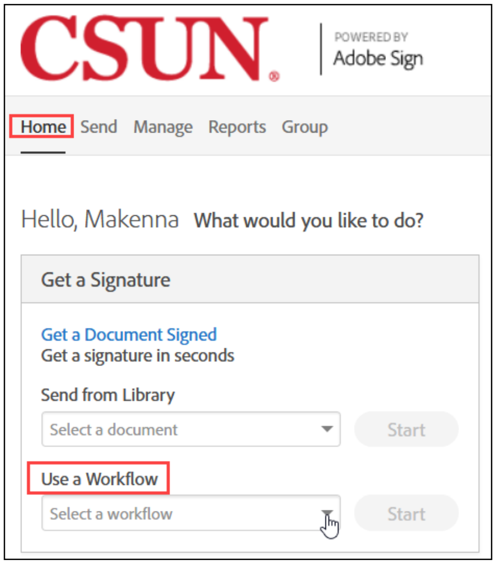
With your CSUN email address and password, click here to log in to Adobe Sign.

## WHO DO I CONTACT FOR HELP?

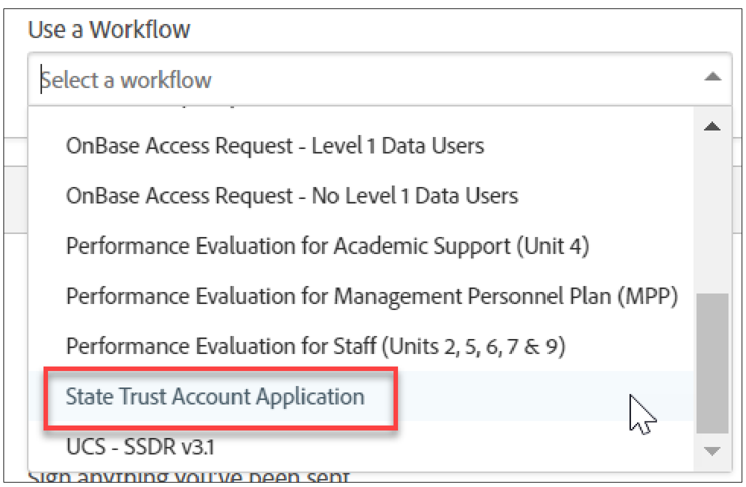
Create a Service Request to Solar Financials or email solarfin@csun.edu for immediate assistance.

## ACCESSING THE WORKFLOW

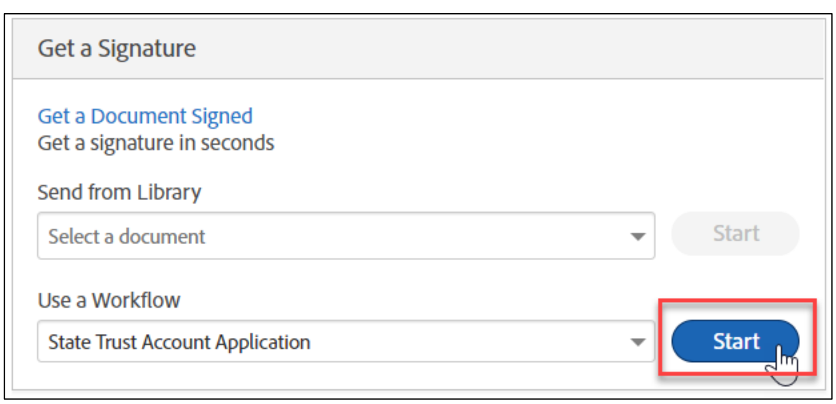
1. From **Home** dashboard, select the **Use a Workflow** dropdown menu.



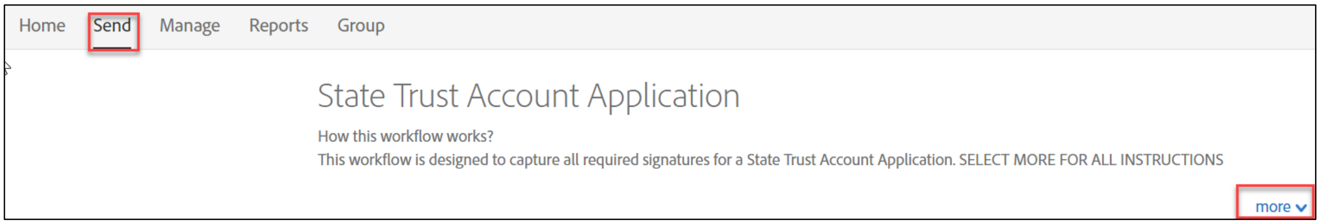

2. Select the **State Trust Account Application** Form




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

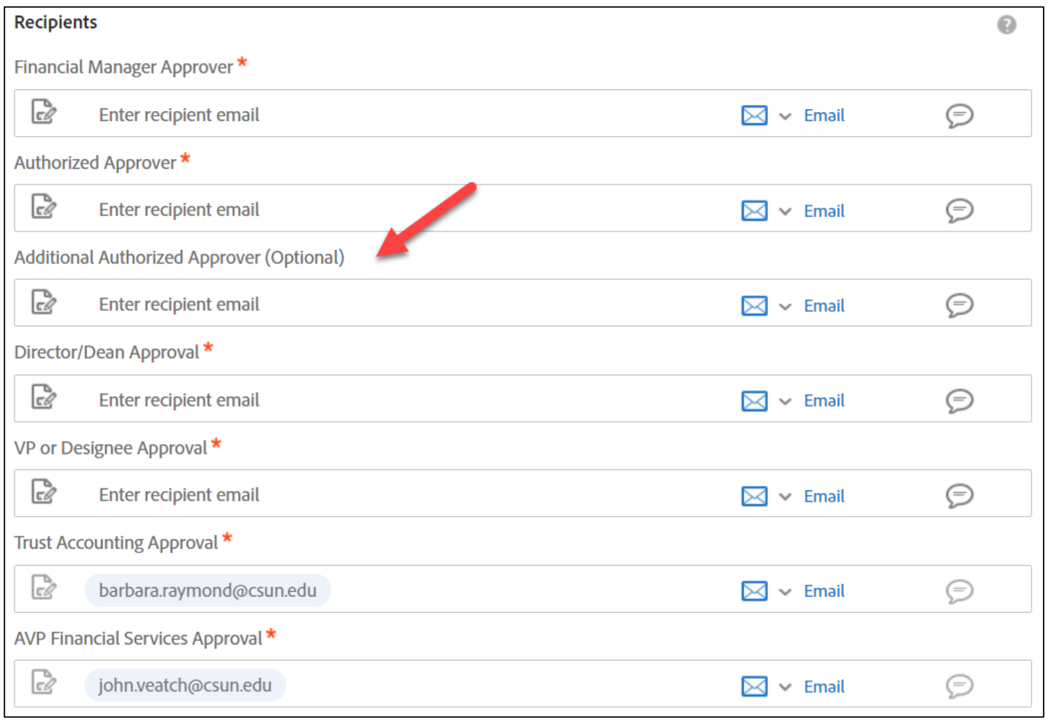


4. Under the **Send** dashboard, read all the instructions for the workflow, select more to view all.




5. Complete the **Recipients** section:

- Enter all required Recipients, a minimum of two authorized approvers are required.
  - A third, optional approver is available but not required. The workflow will skip this approver level if the field is left blank.
- The Financial Manager is included as the first Authorized Approver.
- If there is only one signer on the account, please contact Finance & Trust Accounting for prior approval and further instructions.

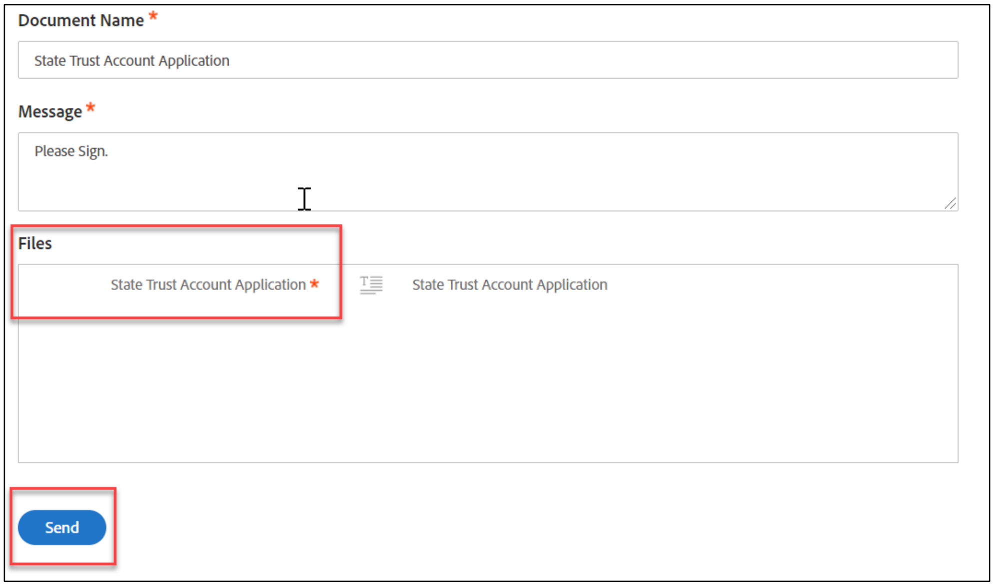



*Trust Accounting Approval and AVP Financial Services Approval are not editable.

6. The Document Name and Message can be edited. This is what will appear in the email to each of the recipients.

7. The **Files** cannot be edited. The State Trust Account Application 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.**




8. **Complete the State Trust Account Application and submit, all fields have been assigned to the appropriate recipient.**