



CALIFORNIA  
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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**

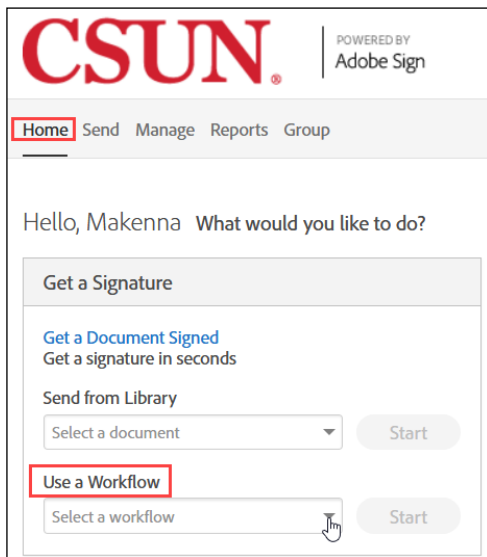
With your CSUN email address and password, click [here](#) to log in to Adobe Sign.

### **WHO DO I CONTACT FOR HELP?**

Create a [Service Request](#) to Solar Financials or email [solarfin@csun.edu](mailto:solarfin@csun.edu) for immediate assistance.

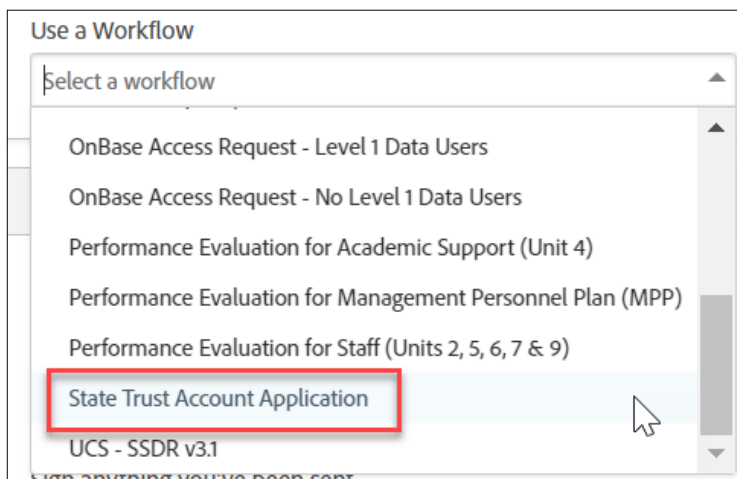
## ACCESSING THE WORKFLOW

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



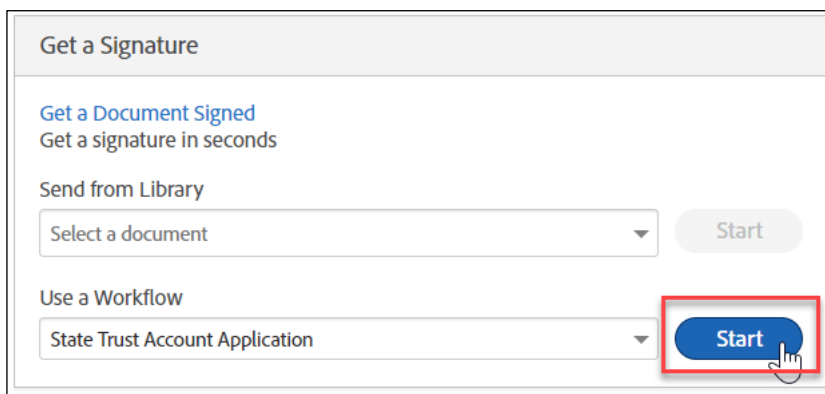
The screenshot shows the CSUN Home dashboard. At the top left is the CSUN logo and 'POWERED BY Adobe Sign'. Below the logo is a navigation bar with 'Home', 'Send', 'Manage', 'Reports', and 'Group'. The main content area says 'Hello, Makenna What would you like to do?'. There are two sections: 'Get a Signature' and 'Get a Document Signed'. The 'Get a Document Signed' section has a 'Send from Library' dropdown menu with 'Select a document' and a 'Start' button. The 'Use a Workflow' section has a dropdown menu with 'Select a workflow' and a 'Start' button. The 'Use a Workflow' section is highlighted with a red box.

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



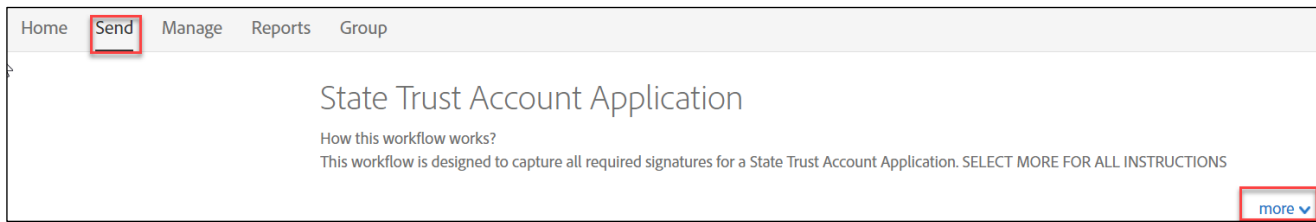
The screenshot shows the 'Use a Workflow' dropdown menu. The dropdown is open, showing a list of workflows. The 'State Trust Account Application' option is highlighted with a red box. The list includes: 'OnBase Access Request - Level 1 Data Users', 'OnBase Access Request - No Level 1 Data Users', 'Performance Evaluation for Academic Support (Unit 4)', 'Performance Evaluation for Management Personnel Plan (MPP)', 'Performance Evaluation for Staff (Units 2, 5, 6, 7 & 9)', 'State Trust Account Application', and 'UCS - SDR v3.1'. A mouse cursor is pointing at the 'State Trust Account Application' option.

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



The screenshot shows the 'Use a Workflow' section. The dropdown menu is now closed, and 'State Trust Account Application' is selected. The 'Start' button to the right of the dropdown is highlighted with a red box. A mouse cursor is pointing at the 'Start' button.

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.

A screenshot of the 'Recipients' section in the application. It shows a list of approval roles, each with a text input field for an email address, a dropdown menu for the communication method (set to 'Email'), and a speech bubble icon. The roles are: Financial Manager Approver \*, Authorized Approver \*, Additional Authorized Approver (Optional), Director/Dean Approval \*, VP or Designee Approval \*, Trust Accounting Approval \*, and AVP Financial Services Approval \*. The 'Additional Authorized Approver (Optional)' field is highlighted with a red arrow. The 'Trust Accounting Approval' field contains the email 'barbara.raymond@csun.edu' and the 'AVP Financial Services Approval' field contains 'john.veatch@csun.edu'. A question mark icon is visible in the top right corner of the section.

\*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.

A screenshot of the 'Document Name' and 'Message' fields. The 'Document Name' field is highlighted with a red box and contains the text 'State Trust Account Application'. The 'Message' field is also highlighted with a red box and contains the text 'Please Sign.'.

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.**

The screenshot shows a form with the following elements:

- Document Name \***: A text input field containing "State Trust Account Application".
- Message \***: A text area containing "Please Sign." with a cursor at the end.
- Files**: A section containing a file attachment "State Trust Account Application \*". The file name is highlighted with a red box. To its right is a document icon and the text "State Trust Account Application".
- Send**: A blue button with the text "Send", also highlighted with a red box.

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