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. In order 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

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 State Trust Account Applications: 1) State Trust Account Application with 2 Authorized Approvers and 2) State Trust Account Application with 3 Authorized Approvers.

Select the appropriate option based on the number of authorized approvers for the account application.

Note: If there is only one signer on the account, select the State Trust Account Application with 2 Authorized Approvers and enter the persons email twice. See Step 5 for additional instructions.

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.

![Send dashboard](image)

5. Complete the **Recipients** section according to the workflow selected, either 2 or 3 Authorized Approvers.

- All Recipients are required on both workflows.
- The Financial Manager is included as one of the Authorized Approvers.
- If there is only one signer on the account, please contact Finance & Trust Accounting for prior approval and further instructions.

![Recipients section](image)

*This image is the Recipients list for a State Trust Account Application with 2 Authorized Approvers. 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.

![Document Name and Message](image)
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.