

PROCESSING INVOICES FOR PAYMENT USING ELECTRONIC SIGNATURES – USING ADOBE SIGN

The goal is to have the appropriate budget manager and/or designee sign the invoice and send to Business Services (Accounts Payable) for processing of payment. There is a special step needed to help Business Services complete the process electronically.

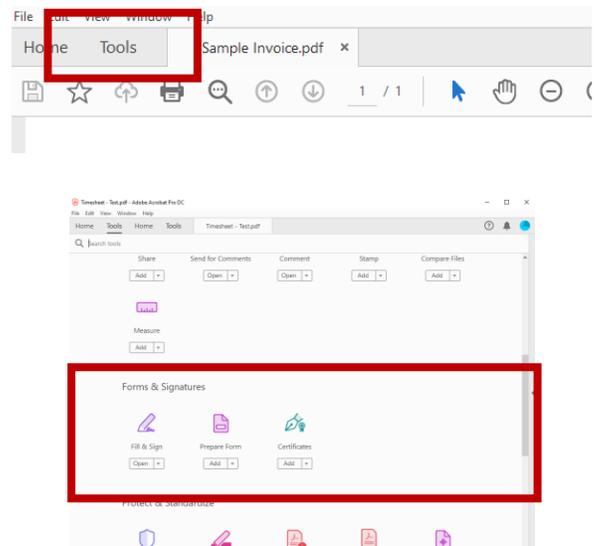
Scenario – Budget Manager will send and initiate the invoice and Accounts Payable will receive the invoice and add additional comments such as PO number on the electronic form. In this case, the initiator may be the budget manager or someone else like the administrative assistant. If the administrative assistant initiate, they do not need to sign.

It may be possible that additional levels of signature are needed prior to submitting the invoice to Business Services (example, Measure G related invoices). The initiator needs to add a second recipient signature before sending to Business Services to facilitate this process.

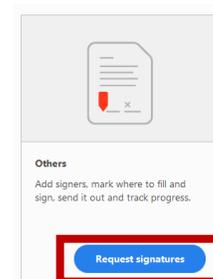
STEPS

1. Open the invoice in **Adobe Acrobat DC**. If you do not have Adobe Acrobat DC, please contact Technology Services for help.
2. To start the signature process with the employee and the supervisor, click on **Tools** on the right top part of the screen.
3. Scroll down to the Forms and Signatures section. Click on the **Fill & Sign** icon.

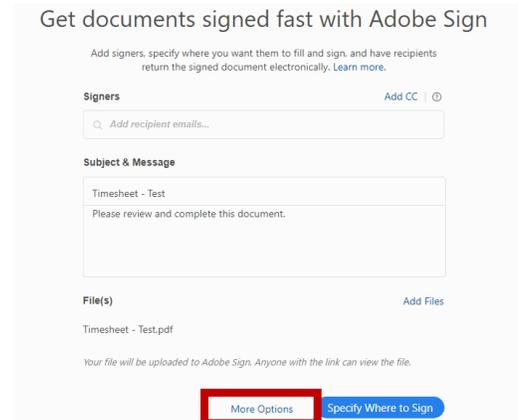
DIAGRAM



4. Click on **Request Signatures**.



5. Click on **More Options** found at the bottom of the screen next to the Specify Where to Sign button.

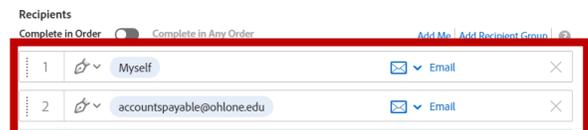


6. Adobe Acrobat is now preparing the document for electronic signatures.
7. As the initiator that needs to sign the document before sending. Click on the **Add Me** link and **Myself** will be added automatically on the first recipient row.



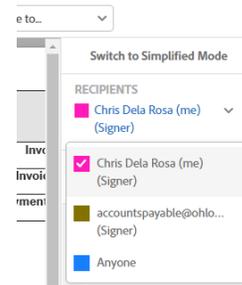
If there is second manager to sign, typically for Measure G related invoices, add the email address of the second manager on the second recipient line.

8. On the next recipient line, add the email address accountspayable@ohlone.edu. This is the distribution list that Business Services uses to receive electronic invoices. The AP staff has access to receive emails from this distribution list.
9. Verify that everything looks good. Then, click **Next**.
10. The next step, is the signing page. Scroll down to the area where you want to set the signature and date sections for all recipients.



In the case of invoices, there is no specific section for signatures. You can add the signature and date fields anywhere on the form that can be seen. Usually, this is done on top of the page.

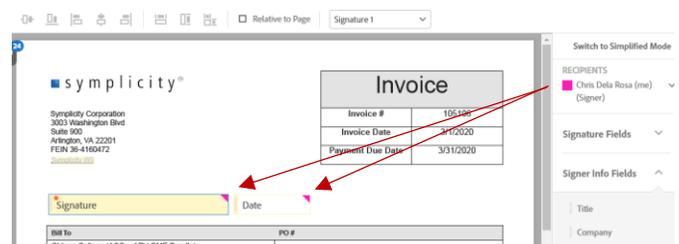
11. On the right panel, choose the name of the recipients. The emails are listed based on the order to sign.



12. Make sure to click on the **Switch to Advance Mode** at the bottom of the right pane.



13. To start specifying the area you want the recipients to sign electronically, expand the **Signature Fields**. Then, drag the **Signature field** to the area you want to have the recipient sign. Do the same for the **Date** field found on the **Signer Info Fields**.

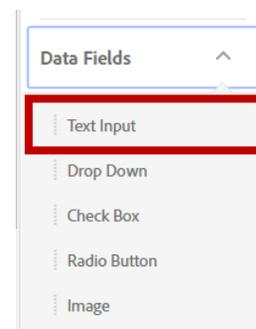


Notice that the color of the field (top right) matches the color of the recipient.

The field box size is also adjustable. It can be expanded if need be.

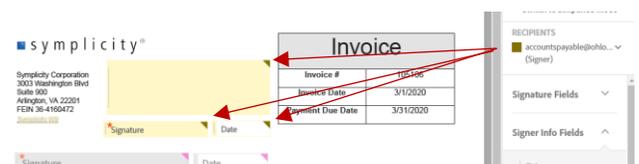
Do the same step if you need another person to sign.

14. Once the fields for all the recipients (except for the accountspayable@ohlone.edu recipient is complete, you are ready to specify the fields for Business Services.

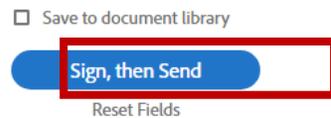


Unlike the budget manager, Business Services will need an extra field on top of the signature and date field. Business Services needs a space for adding comments such as a BPO/PO number. This can be addressed by using the **Text Input** field under the **Data Fields** section.

Add the Text Input field in the form.

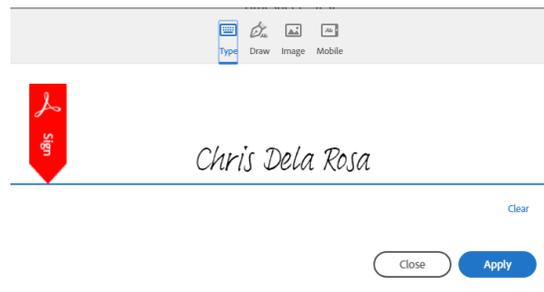


15. When you are done, click on **Sign, then Send**.



16. The document is ready to sign. Follow the tabs for signing. The **Date** field will automatically be filled based on your device's date settings.

17. To sign for the first time, a window will pop up to enter the electronic signature. The choices are type signature, draw, image, or mobile. For simple signatures, use **Type**. Then, click **Apply**.



18. When done, click on the **Click to Sign** button.

19. The document will now be routed to the next recipient.

20. Once all the recipients complete signing the document, the initiator will get an email with the document completely signed with the audit report attached.

It is important to keep the audit report. This provides the document the historical tracking.