

Volunteer Driver AcrobatSign Workflow Guide

Introduction:

The Volunteer Driver AcrobatSign Workflow has been built to streamline the process of signing up volunteers to drive on University business. Please follow these instructions to initiate the workflow and get your volunteers on the road!

Step One - Department Initiation:

This task must be performed by a Sac State employee, normally the department supervisor, or whomever is directing the work/driving of volunteer. If the volunteer attempts to initiate the form, it will not work! Start by clicking the “Volunteer Driver AcrobatSign Workflow” link on the Volunteers website:

<https://www.csus.edu/administration-business-affairs/human-resources/employment-services/volunteers.html>

- 1) Enter the department supervisor email address in the “Supervisor’s Email” field if it is someone other than yourself.
- 2) Enter the volunteer’s email address in the “Volunteer’s Email” and “Re-type volunteer’s email address” fields.
- 3) Enter “HR” as the group name in “Recipient Group” field. Click on “Enter group name” to do so.
- 4) Click “Send” at bottom of page.

The screenshot shows the 'Recipients' section of a form. It contains four rows of input fields, each with a dropdown menu for 'Email'.

- Supervisor's Email:** The dropdown menu is set to 'Myself'.
- Volunteer's Email:** The input field contains the placeholder text 'Enter recipient email'.
- Recipient Group:** The dropdown menu is set to 'Enter group name'. Below it, two email addresses are listed: 'hr-empservices@csus.edu' and 'rklewis@csus.edu'. The input field below the list contains the placeholder text 'Enter recipient email'.
- Please Re-type volunteer's email address:** The input field contains the placeholder text 'Enter recipient email'.

At the bottom left of the form, there is a 'CC' icon and the text 'Hide'.

Step Two – Completing Department Information:

If the workflow was initiated by someone other than the department supervisor, the workflow will alert the supervisor to sign into AcrobatSign and complete the following required sections.

- 1) Complete all required fields on Department Information page of Volunteer Registration Form, then sign.
- 2) Sign the Vehicle Operation Authorization Form. The remaining information will be completed by the volunteer at the next step.
- 3) Sign the STD. 261 Authorization to Use Privately Owned Vehicles on State Business form. If this form is not needed for the specific volunteer assignment you are working on it will be discarded.

What Happens Next:

The remaining steps in the workflow will be completed by the volunteer, Human Resources-Employment Services, and Risk Management.

Step Three – Volunteer Signs:

The volunteer will receive an email prompting them to complete the volunteer information page and necessary driving registration forms.

Step Four – Human Resources-Employment Services Review:

HR-Employment Services will review Volunteer Registration portion of documents and assign a Sac State ID # to the volunteer if one does not exist. This number will be added to the form documents and visible to the Volunteer and the department supervisor. After review and approval, the workflow will return to the Volunteer.

Step Five – CSU Learn, Defensive Driver Training Instructions:

Volunteer will receive instructions to perform the following tasks:

- 1) Create a SacLink account if one does not already exist.
- 2) Complete the mandatory Defensive Driver Training course in CSU Learn.
- 3) Enter Defensive Driver Training course completion date onto the form.

Step 6 – Workflow Completed and Risk Management Receives Documents:

With all pre-requisites completed, Risk Management will now receive the completed documents and complete the process of registering the volunteer as a University driver.