Direct Payment Request

1. Click on the Direct Payment Request link to start the form.
2. You will be prompt to log in to Adobe Sign.
   a. In the email address line, type in your full saclink email address, including @csus.edu (ex. 
      xxxxx@csus.edu) (see figure 1. for the Adobe Sign-In screenshot).
   b. Click the Continue button.
   c. You will see an Adobe Sign splash screen as it routes you to the Adobe Sign Send page.

![Figure 1. Adobe Sign-In screenshot](image-url)
3. Once on the Adobe Sign Send page (see figure 3. for the Send page screenshot)
   a. Navigate to the Recipient fields listed and enter the primary email address. To ensure you are using the primary email address, navigate to directory.csus.edu to confirm the email address.
      i. Department Approving Official field (Signature must be on file in Delegation of Authority list in CFS)
      ii. Authorized Signer field (see figure 2. for the Authorized signer criteria screenshot) is required for exception to policy payments

Direct Payment Exception Requests up to $2,500 - Department’s Manager or Chair shall sign the Direct Payment Requests Direct Payment Exception Requests from $2,501 to $10,000 - AVP or Dean shall sign the Direct Payment Requests Direct Payment Exception Requests over $10,000 - requires both AVP/Dean and ABA/CFO approval

Figure 2. Authorized signer criteria screenshot

iii. Procurement field – Required for all exceptions – use lack@csus.edu
iv. VP/CFO field – Required if over $10,000.00 – use bowman@csus.edu and use the CC field below to add vp-cfo@csus.edu.
b. The Accounts Payable email address auto-populates in and you will not be able to change this.
c. In the CC field, enter email(s) if applicable.
d. In the Document Name field, after Direct Payment Request – type the Vendor Name (e.g. Direct Payment Request – All American Football Foundation).
e. Navigate to the Receipt fields. Click on Add File to attach the receipt(s).
f. In the Justification field, attach a justification memo for purchase and payment policy exceptions only.
g. Click the Send button to route the form for signature.

Figure 3. Send page screenshot
4. Once on the form, click the yellow tab to navigate to the required fields and type in your information (see figure 4. for the Direct Payment Request form screenshot).

![Direct Payment Request form screenshot](image)

*Figure 4. Direct Payment Request form screenshot*

5. Once all the required fields are completed, click the blue **Click to Send** button at the bottom of your screen (see figure 5. the Click to Send button screenshot).

![Click to Send button screenshot](image)

*Figure 5. Click to Send button screenshot*
6. A thumbnail of the form and confirmation message will display. (see figure 6. Confirmation message screenshot) This message confirms that the Direct Payment Request was sent for signature(s). You will also receive an email confirmation that the document was sent for approval. This completes your portion of the workflow.

Figure 6. Confirmation message screenshot

7. Once the Direct Payment Request is approved, you will receive an email confirmation. (see figure 7. Approval Confirmation screenshot) To view the approved document, click on the link provided in the email.

Figure 7. Approval Confirmation screenshot