Reimbursement Request

1. Click on the Reimbursement 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.

![Sign in](image)

*Figure 1. Adobe Sign-In screenshot*
3. Once on the Adobe Sign Send page (see figure 3. for the Send page screenshot)
   a. Click More for a list of required information for this form.
   b. 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. Optional - Preapproval by a designated staff may be required by your department or VP, please input the staff's email below if applicable.
      ii. REQUIRED FIELD - Department Approving Official field (Signature must be on file in Delegation of Authority list in CFS). Stop here if this is an allowable requests. If an exception continue to next steps.
      iii. Required for exception to policy payments- Authorized Signer field (see figure 2. for the Authorized signer criteria screenshot). If signer is the same as approving, they must sign twice. Place email in both sections.

| 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

   i. Procurement field – Required for all exceptions – use lack@csus.edu
   ii. 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 Reimbursement Request – type the payee name e.g. Reimbursement Request – John Doe).

e. Navigate to the Receipt fields. Click on Add File to attach the receipt(s).

f. In the Justification field, attach justification memo for purchase and payment policy exceptions only.

g. Click the Send button to route the form for signature.
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 Reimbursement Request form screenshot).

![Figure 4. Reimbursement Request form screenshot](image)

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).

![Figure 5. Click to Send button screenshot](image)
6. A thumbnail of the form and confirmation message will display. (see figure 6. Confirmation message screenshot) This message confirms that the Reimbursement 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](image)

7. Once the invoice 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](image)