

## University Foundation at Sacramento State (UFSS) Check Request

1. Click on the UFSS Check Request link to start the form.
2. You will be prompted 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](mailto: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.

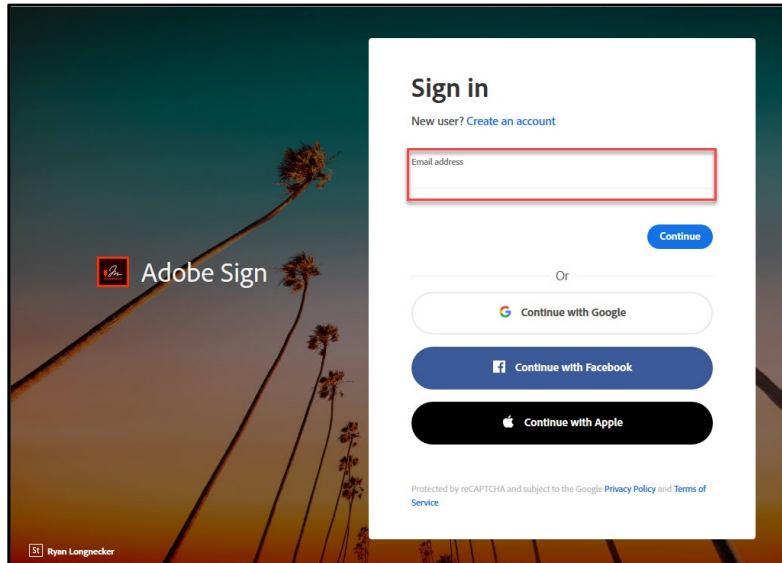


Figure 1. Adobe Sign-In screenshot

3. Once on the *Adobe Sign Send* page (see figure 2. 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](http://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- Signer** field - make sure the signer is listed in the UFSS DOA for the correct X fund.
    - iii. The *Accounts Payable* email address auto-populates in and you will not be able to change this.
    - iv. In the *CC* field, enter email(s) if applicable.
    - v. In the *Document Name* field, after **UFSS Check Request**– enter **the vendor name** (ie. UFSS Check Request – ABC Company).
    - vi. Click the **Send** button to fill out the form, attach supporting documents, and route the form for signature.

The screenshot shows the Adobe Sign interface for sending a document. At the top, it says 'SACRAMENTO STATE' and 'POWERED BY Adobe Sign'. The navigation bar includes 'Home', 'Send', 'Manage', and 'Reports'. The main heading is 'AP\_UFSS Check Request' with a sub-heading 'How this workflow works? Enter instruction for sender...'. The 'Recipients' section is highlighted with a red box and contains three email input fields: 'Preapproval by a designated staff may be required by your department or VP, please input the staff's email below', 'Signer \*', and 'Accounts Payable \*'. The 'Document Name' field is also highlighted with a red box and contains the text 'UFSS Check Request- John Smith'. Below this is a 'Message' field with the text 'Please Sign.' and a 'Files' section with two attached documents: 'UFSS Check Request Form \*' and 'ABA\_Finance\_UFSS Check Request Form'. At the bottom left, there is a blue 'Send' button highlighted with a red box.

Figure 2. 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 3. for the UFSS Check Request form screenshot).
  - a. Navigate to the *Document* fields. Click on 'Click' to attach supporting documents.

**SACRAMENTO STATE** | POWERED BY Adobe Sign

UFSS Check Request

**Start**

**The University Foundation at Sacramento State**

**CHECK REQUEST**

Forward to: Accounts Payable Mail Stop 6004  
Sac State Students: Send to Bursar's Mail Stop 6052

SUPPLIER ID \*

FORM MAY BE RETURNED IF NOT COMPLETE

PAYEE INFORMATION		SUBMITTAL INFORMATION			
Name *		Department *			
Address *		Dept Contact *			
City, State, Zip *		Mail Stop *			
		Ext. *			
Description: * Choose from List		<b>CHECK ONE:</b>			
<input type="checkbox"/> EMPLOYEE <input type="checkbox"/> STUDENT <input type="checkbox"/> VENDOR		<input type="checkbox"/> Mail to Payee <input type="checkbox"/> Deposit @ Bursar's			
Student ID # *		<input type="checkbox"/> Pickup              Name & Phone # *			
<b>DETAILED NATURE OF EXPENSE:</b> Attach all required original supporting documentation, i.e. receipts, invoices, etc. (If hospitality expense, include a brief explanation of how expenditure benefits the University's educational mission.)					
		Document 1:	Click to...		
		Document 2:	Click to...		
		Document 3:	Click to...		
Business Unit: SAFDN		<b>PLEASE COMPLETE</b>			
Account	Fund	DeptID	Class	If expense is COVID-19 related, use class 2973A	Amount
*	*X				* USD
	X				USD
	X				USD
	X				USD

Figure 3. UFSS Check 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 4. the Click to Send button screenshot).



Figure 4. Click to Send button screenshot

6. A thumbnail of the form and confirmation message will display. (see figure 5. Confirmation message screenshot) This message confirms that the UFSS Check Request was sent for signature. You will also receive an email confirmation that the document was sent for approval. This completes your portion of the workflow.

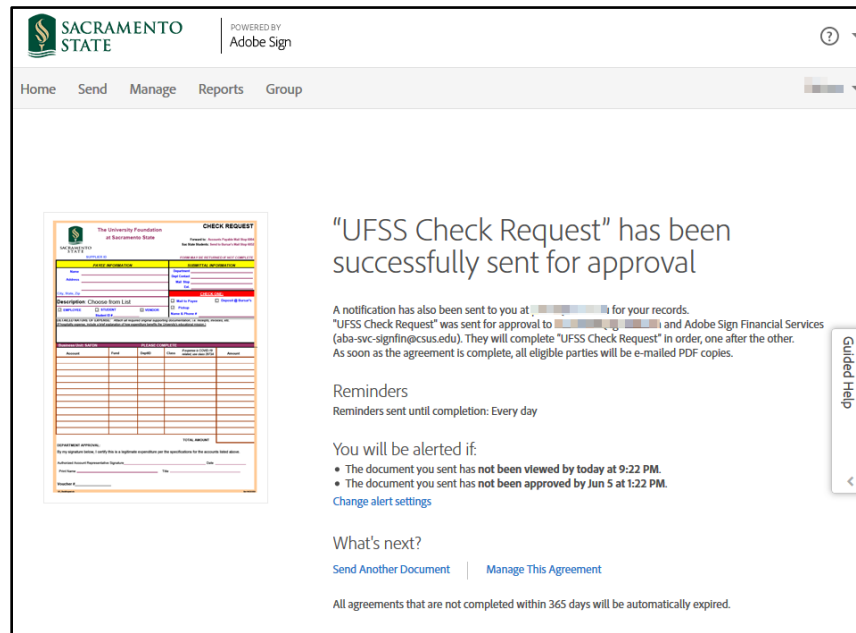


Figure 5. Confirmation message screenshot

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.

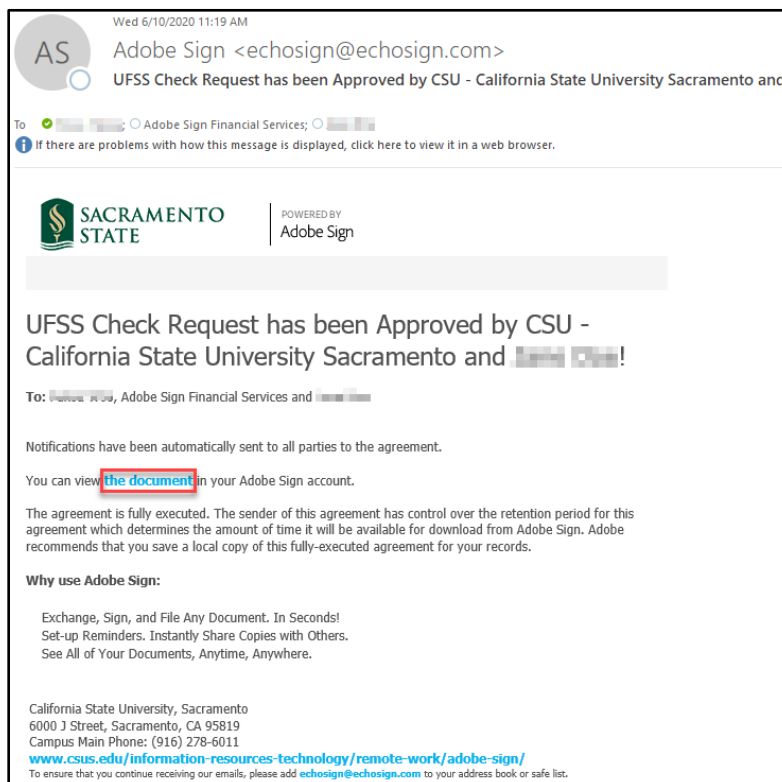


Figure 6. Approval Confirmation screenshot