# California State University Monterey Bay

Preparing Payment Request using Accounts Payable as Certified Recipient in Adobe Sign.

The purpose of this document is to assist AdobeSign users in preparing payment requests designating the AP team's paymentrequest@csumb.edu email address as a Certified Recipient. This revised process will allow payment requestors to include paymentrequest@csumb.edu in the original AdobeSign routing instructions, thereby avoiding any duplicate work or forwarding of completed, authorized payment requests.

CSUMB users can find the AdobeSign link on the CSUMB Dashboard or use the link: https://csumb-sign.na2.documents.adobe.com/account/homeJS
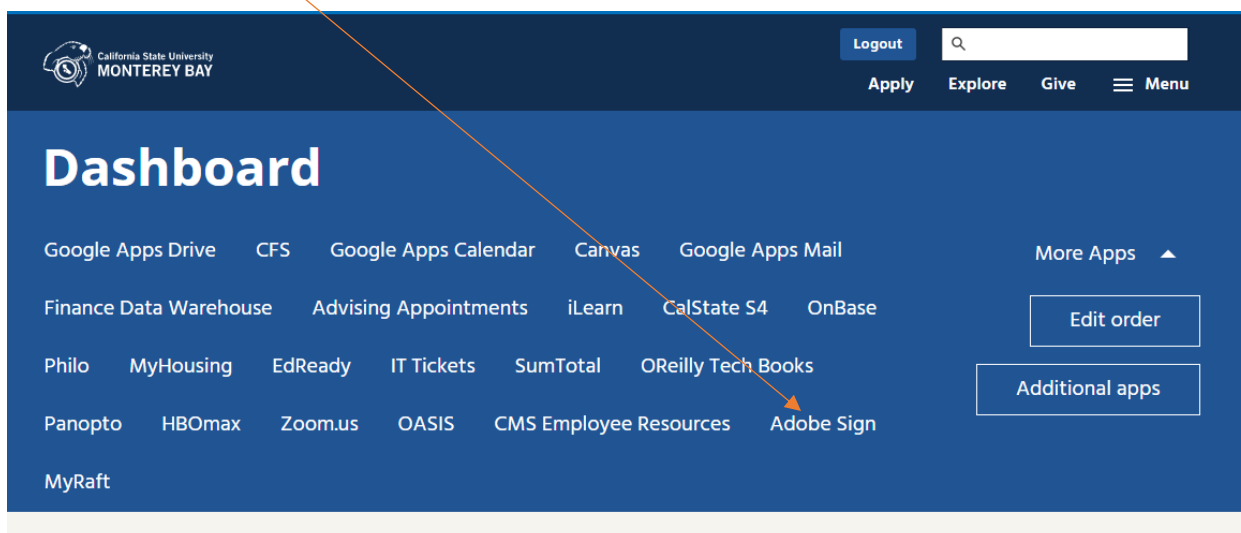
CSUMB Accounts Payable
For all payment requests, travel expense claims, and travel advance requests: paymentrequest@csumb.edu
For general inquiries: accounts_payable@csumb.edu

AdobeSign Certified Recipient

Go to: Home page and select "Request Signatures" option which will bring up the blank payment request page.
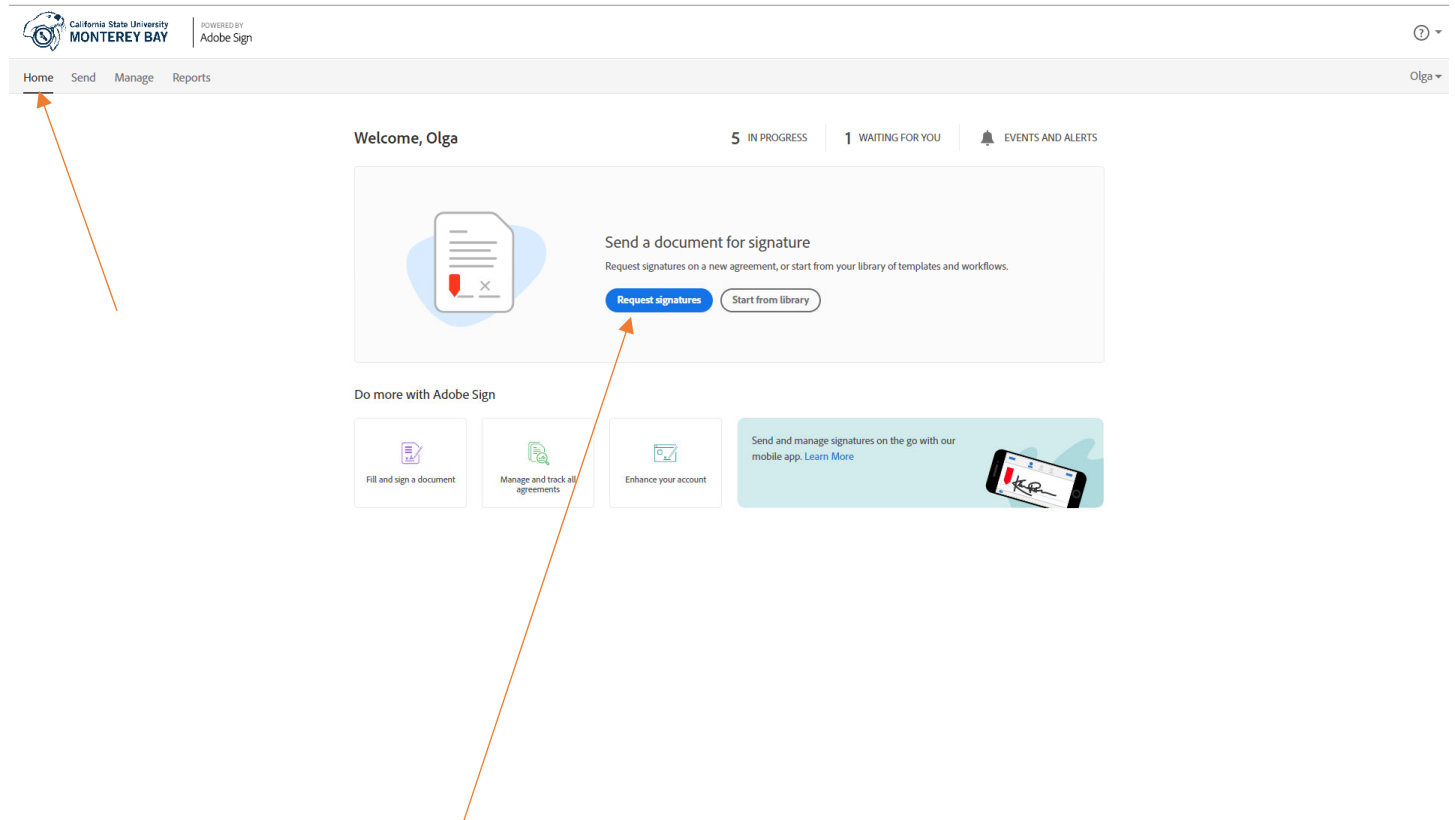
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1. Select either the **Complete in Order** or **Complete in Any Order** option in the Recipients section.

   If the preparer selects the **Complete in Order** option, the signers receive and sign the document in the order that their email addresses are entered into the **To:** field.

   If the preparer selects the **Complete in Any Order** option, all recipients receive the document signature request at the same time and can sign in any order. The Accounts Payable team may acknowledge receipt prior to the completion of the authorization/certification of the payment request by the authorized signers. After the last signer has completed the signing process, all parties receive a Signed & Filed email with the signed PDF attached. The final approved document also then will be sent automatically to paymentrequest@csumb.edu upon completion of all signatures; it is only at this time that the payment request, TEC, or other document will be processed.

AdobeSign Certified Recipient

2. Click on the drop-down menu in the recipients' field to select the appropriate status (Signer, Certified Recipient, etc.) and order of the signers.

   Remember to include those who have a delegated authority based on your division or departmental organizational structure and current delegation of authority documentation.

   Keep "Preview & Add Signature Fields" box checked.

Get documents signed
Send an agreement to others for e-signing, approval, or other processing.

Send from: Default (Primary Group) ▼ ?

Recipients *
Complete in Order ⬤ Complete in Any Order   Add Me | Add Recipient Group | ?

| 1 | ✒ ⌄ | Enter recipient em🄶 |

Show CC

- Signer
- Approver
- Acceptor
- Certified Recipient
- Form Filler
- Delegator

Message *

Agreem...

Please re...

Files *   Add Files

Drag & Drop Files Here
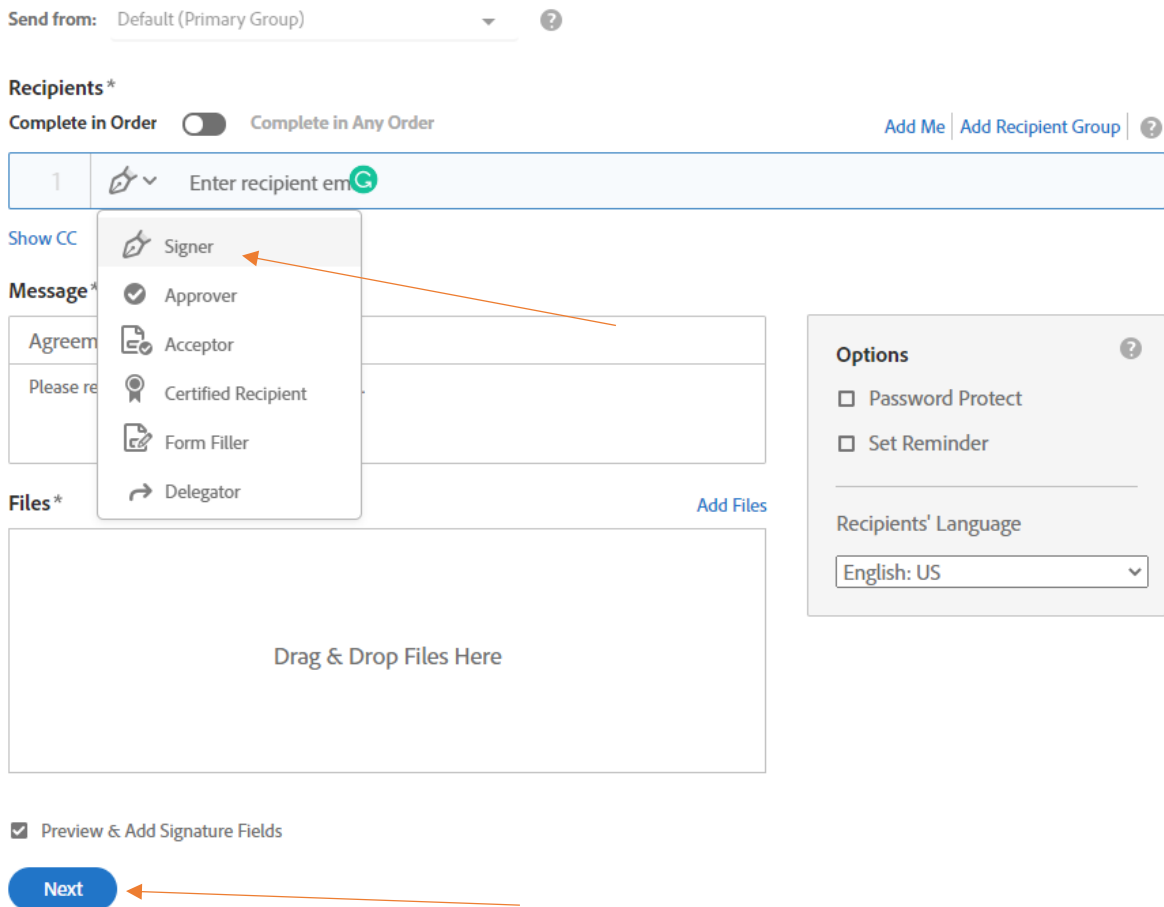
Options ?
☐ Password Protect
☐ Set Reminder

Recipients' Language
[English: US ⌄]

☑ Preview & Add Signature Fields

[Next]

3. Add the paymentrequest@csumb.edu email address to the recipients' list as the final recipient using "**Certified Recipient**," which ensures the final approved/completed payment request is forwarded to the paymentrequest@csumb.edu

   - Ensure the "Email" option is selected instead of a signature.

   Failure to follow the steps listed above will result in the accounts payable team not receiving your payment request.

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4. Under the "Message" fields:

    • In the "Agreement Name" enter the vendor name and invoice ID
    • Add message to the message box for the recipients

5. Under "Files"

    Select "Add Files" link which will bring up file selection screen (see below)

AdobeSign Certified Recipient

6. Select "Choose Files from My Computer"
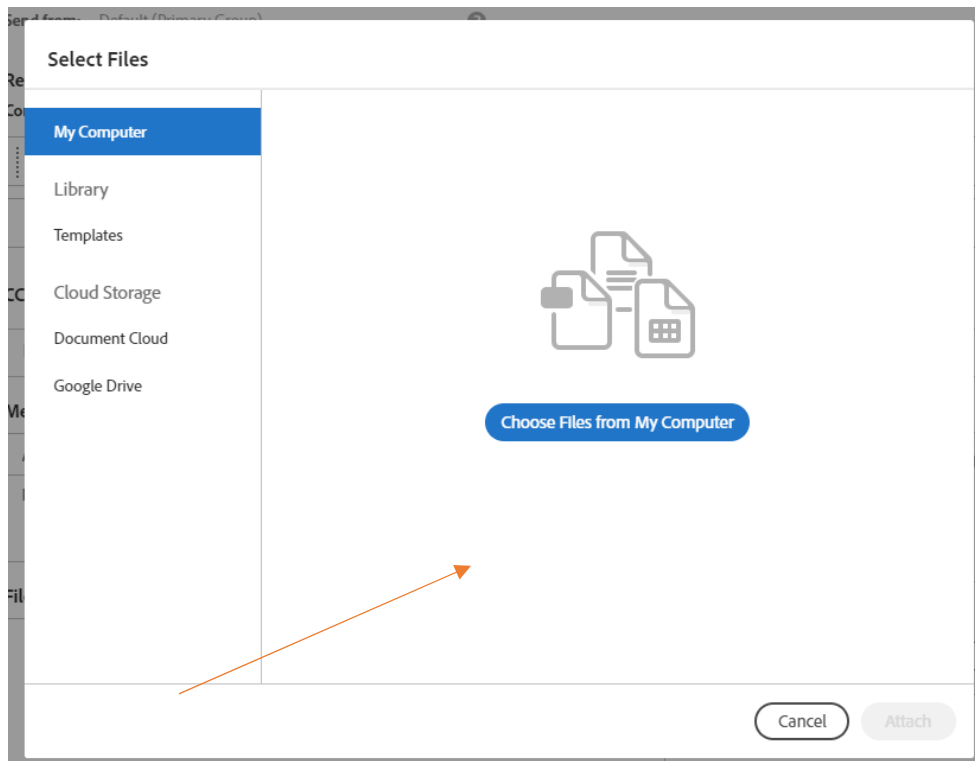
7. Select the document (s) you would like to add to your payment requests and add them to the payment request. Please note, documents will be added and viewed by the recipients in the order they were selected and combined in one multipage document.

8. When all the required documents are added, select "Next" at the bottom of the page to continue to the next page where you will add additional fields for recipient completion (signature(s), date, name, title, text boxes, etc.)

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9.   Make sure to add signature and date fields for the signers. To add signature field, click and drag the "Signature" field to the desired place on the document. Use the same step for initials, signature block, and stamp. **Please DO NOT add the signature box to the paymentrequest@csumb.edu recipient**.
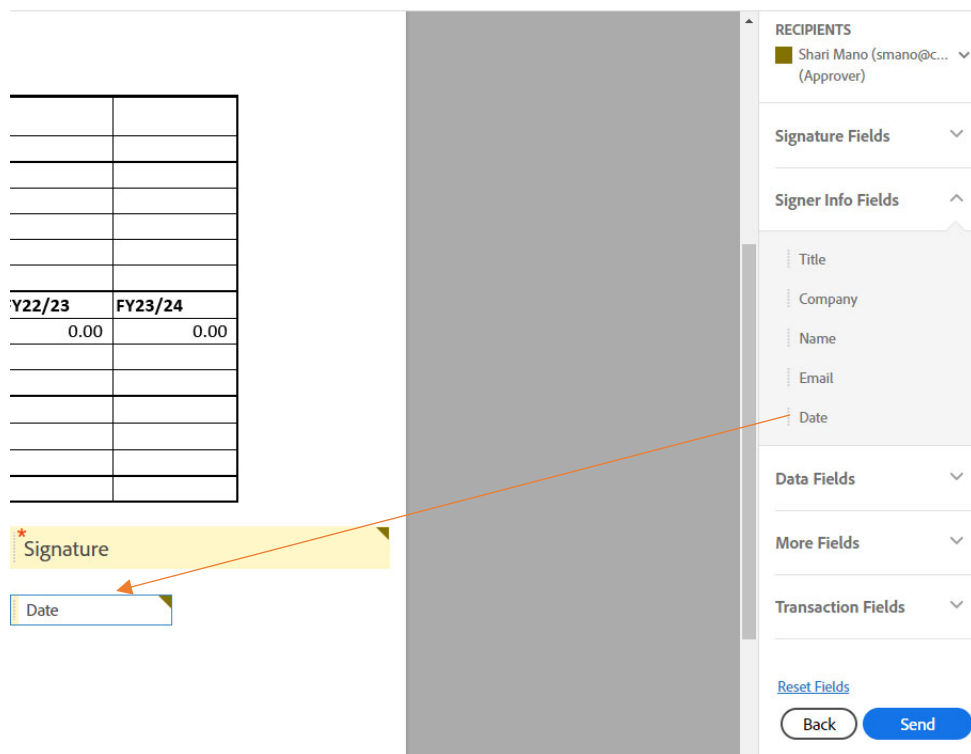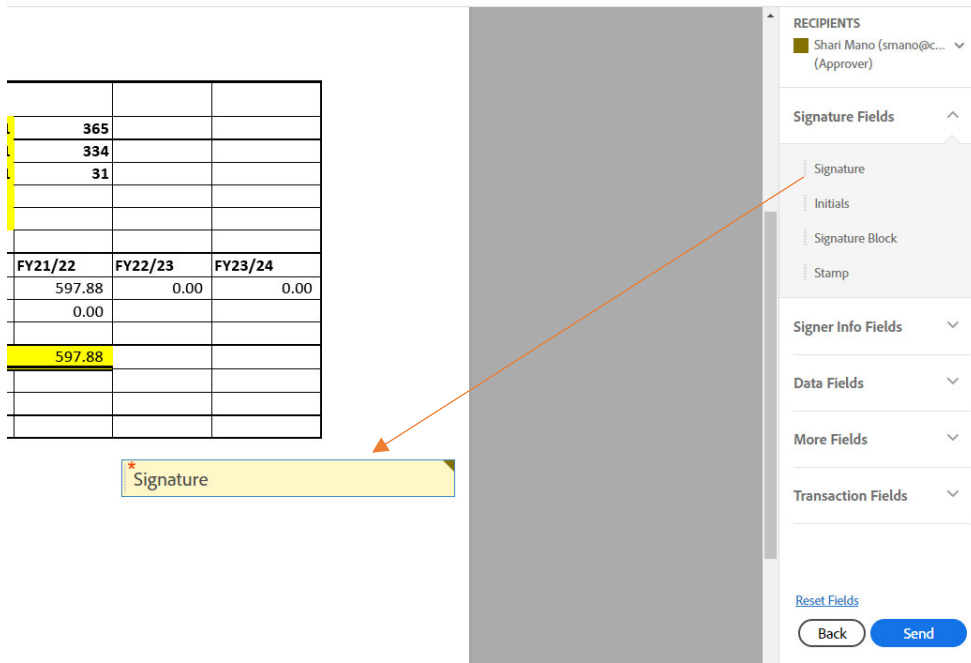
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10. Review Adobe Sign payment requests.

If you need to make changes, use "Reset Fields" to change the current page or the "Back" button to go back to the previous page.

If you agree with the prepared document, use the "Send" button to send it to the assigned recipients. Please note, accounts payable (paymentrequests@csumb.edu) must be the last recipient of the signed copy.

Your submission for the payment request is now complete. All parties will receive a confirmation email. The accounts payable payment request email will receive the completed request for payment processing.

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