

Adobe (v2019) PDF Signature Process for Budget Forms

Please follow the following new procedures when submitting Budget forms. All new Budget forms will be required to be sent via Adobe Sign. These procedures outline the steps necessary to successfully submit. Any deviation from these steps will cause delay and/or rejection of your request.

1. Open the fillable template.
2. Fill in ALL required information in the fields as you normally do on a hardcopy.
3. Once all fields are completed by the requestor, the Budget form must be sent for approval via Adobe Sign.
4. The following email addresses must be included in all Budget forms:
 - a. Signature required -Reviewed by Budget Tech/Analyst- Budget Dept.
(budget@cerritos.edu)
 - b. Signature required – Approved by Budget Manager– Conrad Selorio
(cselorio@cerritos.edu)
5. Click on **Adobe Sign** in the **Tools Menu**.
6. Click **Advanced**.
7. In the **Recipients** section, add the email addresses for signers in the following order:
 - 7.1 Appropriate Manager(s)
 - 7.2 Appropriate Vice President or President
 - 7.4 budget@cerritos.edu
 - 7.4 cselorio@cerritos.edu
8. For “**Change in Accounting Classification for Employees**” forms, enter the appropriate manager(s) email address as signer 1 and signer 2 in the **Recipients** section AND add the payroll@cerritos.edu address for **CC**.
9. In the **Message** section, revise the subject line and/or body accordingly, to provide a better description for recipients
10. In the **Files** section, click **Add Files**, to attach backup documentation, as needed
11. Click the blue **Next** button on the bottom; this will take you to a preview before sending
12. Click the blue **Send** button on the bottom

The document is sent for signature to the recipients and a confirmation notice is displayed.

You receive an email from Adobe Sign stating that the agreements have been sent to the first signer for signature. The first signer also receives an email with a link to sign the agreement. When the signer adds his or her signature in the signature field and then clicks the **Click to sign** button, the agreement is sent to the next signer with a link to sign, and so on. Once the agreement is signed by all the signers, everyone gets a copy of the signed agreement.