



## Business Process Guide: Special Project Agreement (New) in DocuSign

### Overview


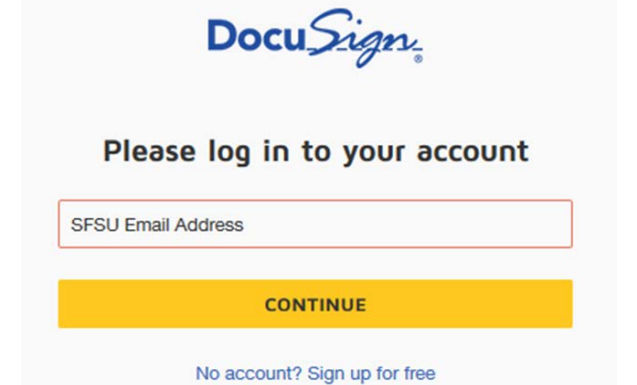
This document provides step by step instructions to complete the Special Project Agreement through DocuSign.

The Special Project Agreement, between University Corporation at San Francisco State University and the project account holders, operates in compliance with California Administrative Code Title V, Section 42500, the ICSUAM, and the policies of the University Corporation. This agreement defines the parameters and scope of the project, and lists the potential sources of revenue and types of expenses.

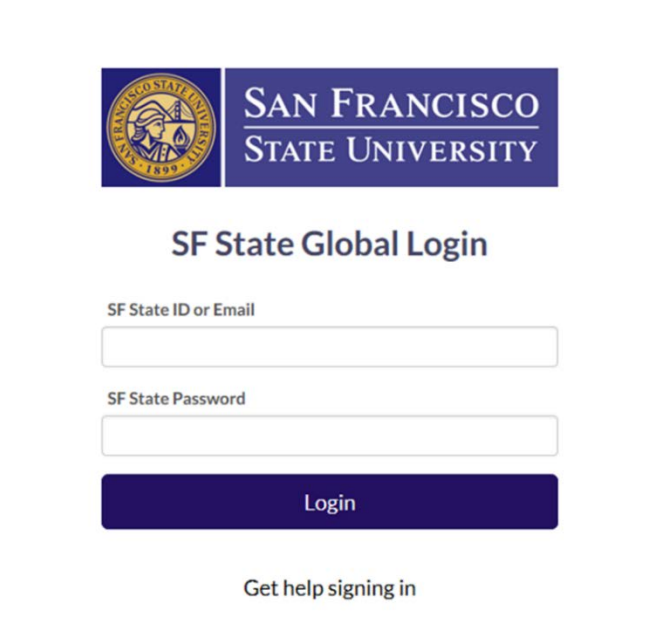
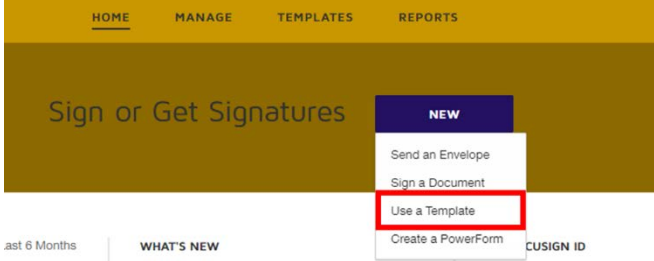
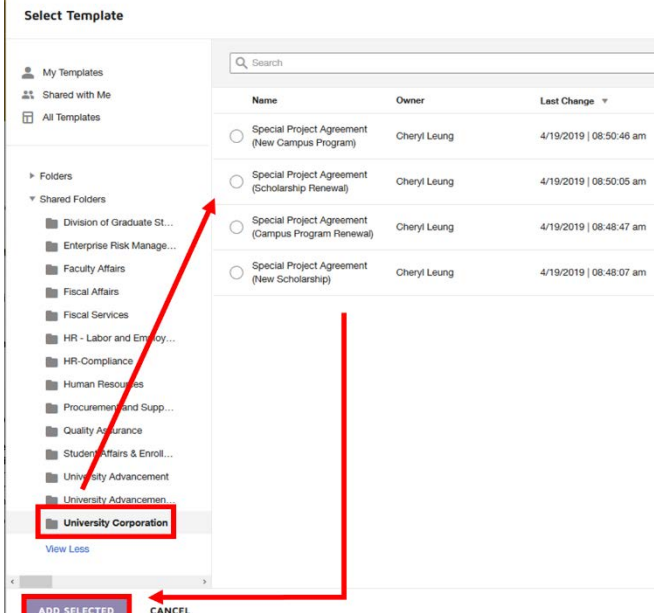
*For general questions regarding Special Project Agreement, please contact Kathleen Bruno at [kbruno@sfsu.edu](mailto:kbruno@sfsu.edu) or 415.338.7920, or Shelby Zuo at [zuo@sfsu.edu](mailto:zuo@sfsu.edu) or 415.338.7783.*

*For general questions regarding DocuSign, please visit [DocuSign @ San Francisco State](#) or contact Quality Assurance at [gateam@sfsu.edu](mailto:gateam@sfsu.edu).*

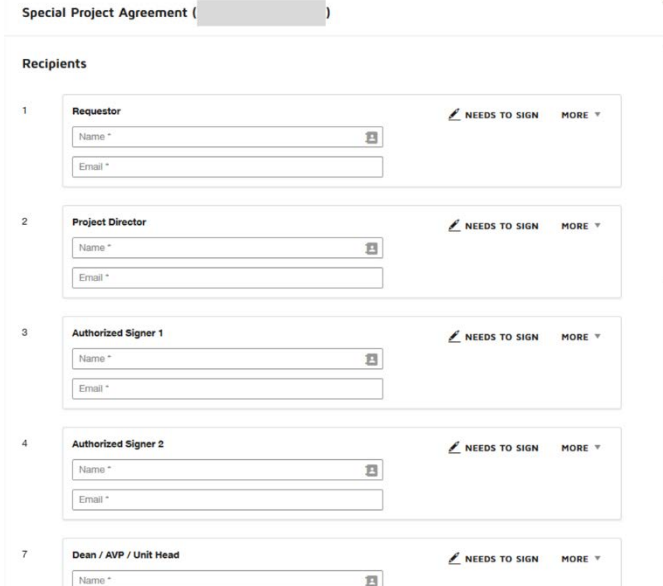
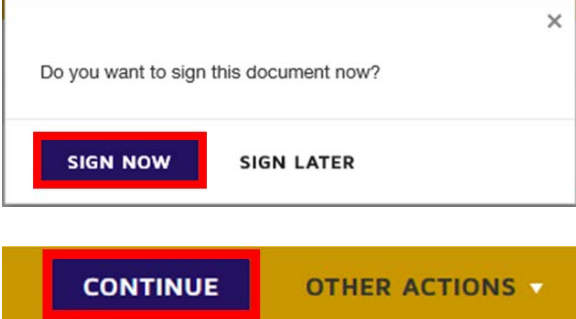
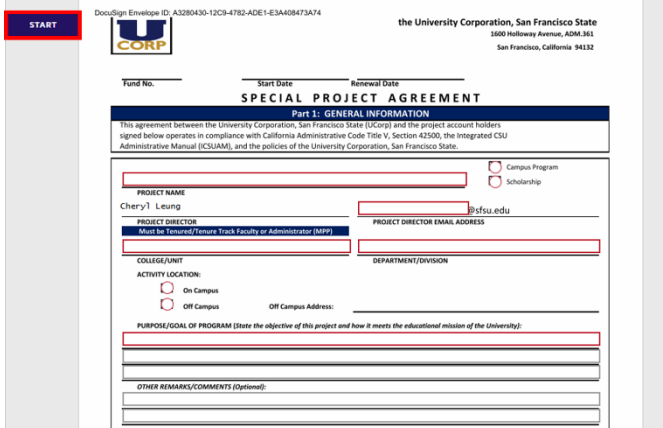

### Procedures for Requester

Steps	Examples
1. To access SFSU's DocuSign homepage, please go to <a href="https://account.docusign.com/">https://account.docusign.com/</a>	
2. Enter your <b>SFSU email address</b> and select <b>CONTINUE</b> .	



Steps	Examples
<p>3. Enter your <b>San Francisco State email address</b> &amp; select <b>CONTINUE</b>. Enter your San Francisco State ID or email address and password to access your DocuSign account.</p>	 <p>The screenshot shows the 'SF State Global Login' page. At the top left is the San Francisco State University logo. Below it, the text 'SF State Global Login' is centered. There are two input fields: 'SF State ID or Email' and 'SF State Password'. Below these fields is a blue 'Login' button. At the bottom, there is a link that says 'Get help signing in'.</p>
<p>4. From the DocuSign homepage, click on the <b>NEW</b> button and then select <b>USE A TEMPLATE</b> from the drop down menu.</p>	 <p>The screenshot shows the DocuSign homepage with a navigation bar at the top containing 'HOME', 'MANAGE', 'TEMPLATES', and 'REPORTS'. The main heading is 'Sign or Get Signatures'. A 'NEW' button is visible, and a dropdown menu is open below it, showing options: 'Send an Envelope', 'Sign a Document', 'Use a Template' (highlighted with a red box), and 'Create a PowerForm'. There is also a 'CUSIGN ID' field on the right.</p>
<p>5. Under Shared Folders, choose <b>University Corporation</b>. Check the box for either <b>Special Project Agreement (New Campus Program)</b> or <b>Special Project Agreement (New Scholarship)</b>. When you are done, click <b>ADD SELECTED</b>.</p>	 <p>The screenshot shows the 'Select Template' dialog box. On the left, there is a tree view of folders. The 'University Corporation' folder is selected and highlighted with a red box. A red arrow points from this folder to the main list of templates. The main list has columns for 'Name', 'Owner', and 'Last Change'. There are four templates listed, all owned by 'Cheryl Leung'. The first two are 'Special Project Agreement (New Campus Program)' and 'Special Project Agreement (Scholarship Renewal)'. The last two are 'Special Project Agreement (Campus Program Renewal)' and 'Special Project Agreement (New Scholarship)'. At the bottom, there are 'ADD SELECTED' and 'CANCEL' buttons, with 'ADD SELECTED' highlighted by a red box. A red arrow points from the 'ADD SELECTED' button back to the 'University Corporation' folder.</p>



Steps	Examples
<p>6. Assign recipient contact information (e.g. add yourself as <b>Requestor</b>). If there is only one authorized signer, you may remove any unnecessary recipient by hovering over the right side of the recipient and clicking on the <b>X</b> to delete them and their assigned fields. For more information, please see <a href="http://docuSign.sfsu.edu/content/add-or-remove-recipients-workflow-template">http://docuSign.sfsu.edu/content/add-or-remove-recipients-workflow-template</a>. When complete, click <b>SEND</b> at the bottom left corner of the page.</p>	
<p>7. Click <b>SIGN NOW</b> and then <b>CONTINUE</b> in DocuSign.</p>	
<p>8. Select <b>START</b> to begin filling out required information.</p>	
<p>9. Click <b>FINISH</b> when you are done.</p>	



Steps	Examples
<p>10. When the transaction is completed, you will receive a DocuSign email notification with the signed document and transaction summary attached. You may also access the signed document in your DocuSign account by selecting <b>VIEW COMPLETED DOCUMENT</b>.</p>	

### Procedures for Signers

Steps	Examples
<p>1. To access the Special Project Agreement, open the DocuSign email and select <b>REVIEW DOCUMENTS</b>.</p>	
<p>2. Enter your <b>San Francisco State email address</b> &amp; select <b>CONTINUE</b>. Enter your San Francisco State ID or email address and password to access your DocuSign account.</p>	



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 San Francisco State University  
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Steps	Examples
<p>3. Select <b>START</b> to begin reviewing the Special Project Agreement.</p>	
<p>4. Click <b>FINISH</b> at the top right to complete your review of the document.</p>	
<p>5. When the transaction is completed, you will receive a DocuSign email notification with the signed document and transaction summary attached. You may also access the signed document in your DocuSign account by selecting <b>VIEW COMPLETED DOCUMENT</b>.</p>	