

The University Corporation San Francisco State University PO Box 320160 San Francisco, CA 94132

Business Process Guide: Special Project Agreement (Renewal) 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 <u>kbruno@sfsu.edu</u> or 415.338.7920, or Shelby Zuo at <u>zuo@sfsu.edu</u> or 415.338.7783.

For general questions regarding DocuSign, please visit <u>DocuSign @ San Francisco State</u> or contact Quality Assurance at <u>gateam@sfsu.edu</u>.

Procedures for Requester

	Steps	Examples
1.	To access SFSU's DocuSign	
	homepage, please go to	Q https://account.docusign.com
	https://account.docusign.com/	
2.	Enter your SFSU email address and	DocuSian
select CONTINUE.	select CONTINUE.	Docurreges
		Please log in to your account
		SFSU Email Address
		CONTINUE
		No account? Sign up for free



	Steps	Examples				
3.	Enter your San Francisco State email address & select CONTINUE . Enter your San Francisco State ID or email address and password to access your DocuSign account.	SE State Global Login				
		SF State ID or Email				
		SF State Password				
		Login				
		Get help signing in				
4.	From the DocuSign homepage, click on the NEW button and then select USE A TEMPLATE from the drop down menu.	HOME MANAGE TEMPLATES REPORTS Sign or Get Signatures NEW Send an Envelope Sign a Document Use a Template Create a PowerForm Cusion id				
	5. Under Shared Folders, choose	Select Template ×				
	University Corporation. Check	My Templates				
	Agreement (Campus Program Renewal) or Special Project Agreement (Scholarship Renewal). When you are done, click ADD SELECTED.	#1 Shared with Me Name Owner Last Change * All Templates Special Project Agreement Cheryl Leung 4/19/2019 (06:50:46 am				
		Folders Charge Calify Section 10 (1997) Folders Charge Calify Calify Charge Calify Charge Calify Charge Calify Charge Calify				
		Shawed Folders Division of Graduate SL Special Project Agreement (Campus Program Renewa) Cheryl Leung 4/19/2019 08:48:47 am				
		Faculty Affairs Special Project Agreement Cheryl Leung 4/19/2019 (08:48:07 am (New Scholarship)				
		Fiscal Services HR - Labor and Em Coy HR-Compliance Kuman Resources Frocurementum Supp Countly Advancement University Advancement University Advancement Advancement Chrosoft Carboration View Less CADD SELECTED CANCEL				



	Steps		Exar	nples	
6.	Assign recipient contact information (e.g. add yourself as Requestor). If	Special Recipie	Project Agreement ()	×
	there is only one authorized signer, you may remove any unnecessary recipient by hovering over the right	1	Requestor Name * Email *	8	Z NEEDS TO SIGN MORE *
	side of the recipient and clicking on the X to delete them and their assigned fields. For more	2	Project Director Name * Email *	8	🖌 NEEDS TO SIGN MORE ¥
	information, please see <u>http://docusign.sfsu.edu/content/ad</u> d-or-remove-recipients-workflow-	3	Authorized Signer 1 Name - Email -	8	🖌 NEEDS TO SIGN MORE 🔻
	template.	4	Authorized Signer 2 Name - Email -	8	🖌 NEEDS TO SIGN MORE *
7.	Scroll down and replace the text "Fund Number" with the Fund Number that is associated with this agreement. When complete, click SEND at the bottom left corner of the page.	Messag Ousto Email Sub Please D Characters Email Mee Dear Col A Specia The A Specia Characters	e to Al Recipients me meal and language for each recipient definitions definitio	Advanced Op - Racipients can - Incomplete env - Racipients are - Comments are - Senders can us	tions Edit change signing mesponsibility velopes expire 180 days after send date warned 7 daylgi before request expires enabled se either quick send or advanced edit
8.	Click SIGN NOW and then CONTINUE in DocuSign.		Do you want to sign this docu SIGN NOW SIGN CONTINUE	IMENT NOW?	ACTIONS V
9.	Select START to begin filling out required information on the Special Project Agreement.	START	Doctore Reverse ID A SERVICE - LOANS HEADER - LOANS	the Univer	Initial of the University:



Steps	Examples
10. Click FINISH when you are done.	FINISH OTHER ACTIONS •
11. When the transaction is completed,	Special Project Agreeme V Summary.pdf 364 88 264 82 159 85 159 85
notification with the signed	SAN FRANCISCO STATE UNIVERSITY
attached. You may also access the	
signed document in your DocuSign account by selecting VIEW	Your document has been completed.
COMPLETED DOCUMENT.	VIEW COMPLETED DOCUMENT

Procedures for Signers

Steps	Examples
 To access the Special Project Agreement, open the DocuSign email and select REVIEW DOCUMENTS. 	SAN FRANCISCO STATE UNIVERSITY Quality Assurance sent you a document to review and sign. REVIEW DOCUMENTS
 Enter your San Francisco State email address & select CONTINUE. Enter your San Francisco State ID or email address and password to access your DocuSign account. 	SAN FRANCISCO STATE UNIVERSITY SF State ID or Email SF State Password Login Get help signing in



	Steps	Examples
3.	Select START to begin reviewing the Special Project Agreement.	Configure Envelopes ID: A2383436-1209-4782-ADE1-E3A468473A74 the University Corporation, San Francisco State 100 Indiversa Annue, ADM 381 San Francisco State San San Francisco State San San Francisco State San San San Francisco State San San
4.	Click FINISH at the top right to complete your review of the document.	FINISH OTHER ACTIONS •
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 VIEW COMPLETED DOCUMENT .	Special Project Agreene Marka 2 attachments (502 KB) Deveload all SAN FRANCISCO STATE UNIVERSITY Your document has been completed VIEW COMPLETED DOCUMENT