



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.

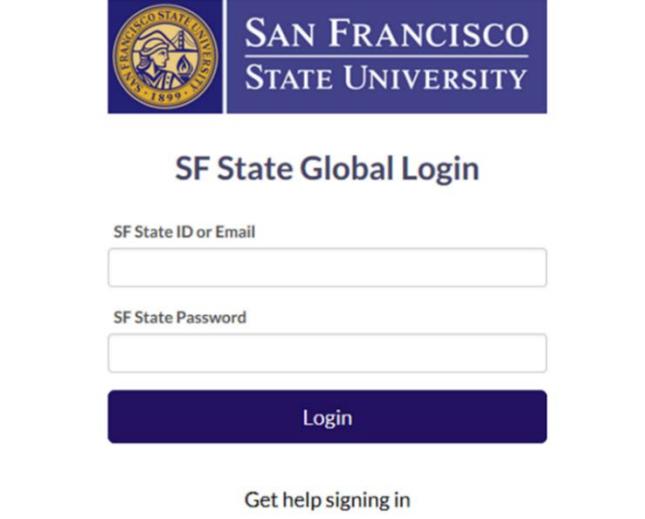
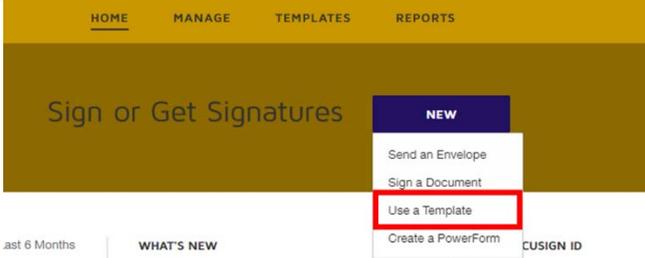
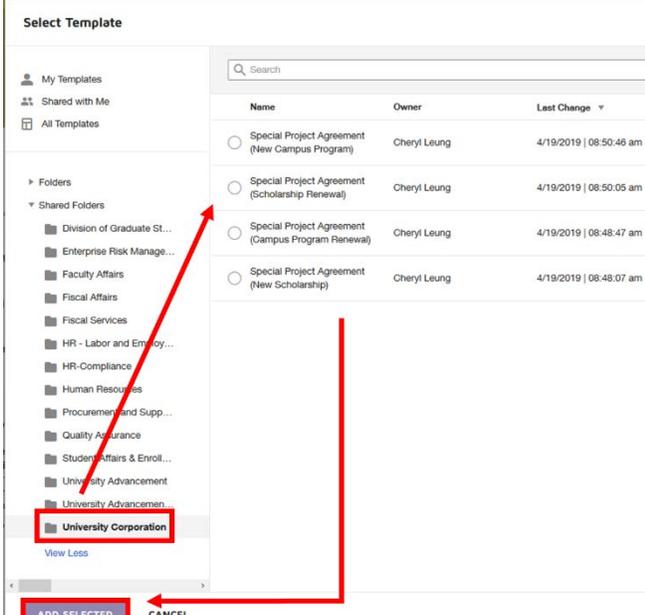
For general questions regarding Special Project Agreement, please contact Kathleen Bruno at kbruno@sfsu.edu or 415.338.7920, or Shelby Zuo at zuo@sfsu.edu or 415.338.7783.

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

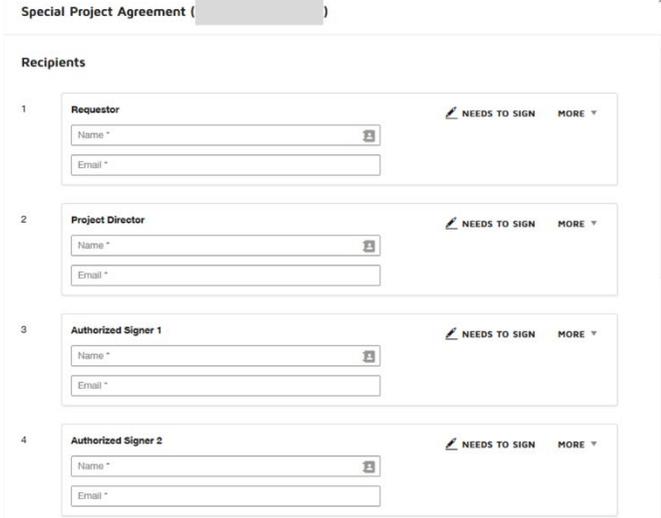
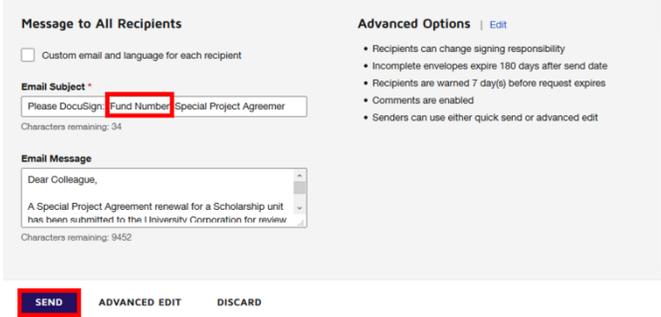
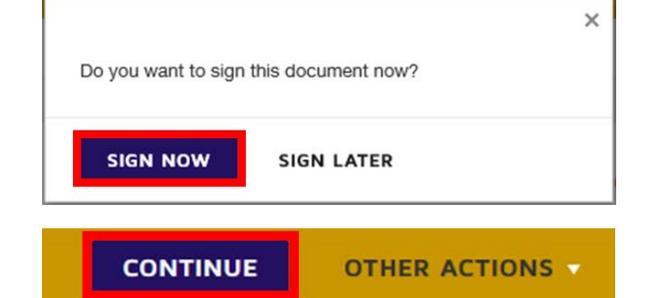
Procedures for Requester

Steps	Examples
1. To access SFSU’s DocuSign homepage, please go to https://account.docusign.com/	
2. Enter your SFSU email address and select CONTINUE .	

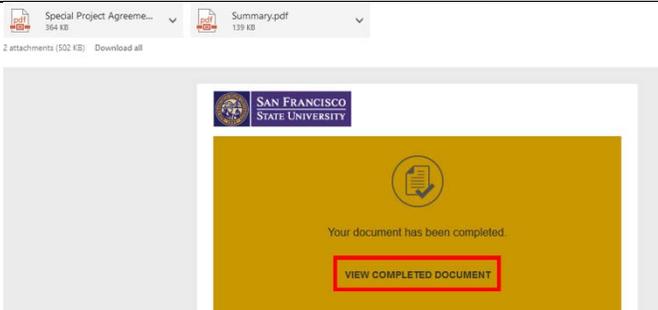


Steps	Examples
<p>3. Enter your San Francisco State email address & select CONTINUE. Enter your San Francisco State ID or email address and password to access your DocuSign account.</p>	 <p>The screenshot shows the SF State Global Login page. At the top left is the San Francisco State University logo. Below it is the text "SF State Global Login". 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 NEW button and then select USE A TEMPLATE from the drop down menu.</p>	 <p>The screenshot shows the DocuSign homepage. The top navigation bar includes "HOME", "MANAGE", "TEMPLATES", and "REPORTS". The main heading is "Sign or Get Signatures". A "NEW" button is highlighted, and its dropdown menu is open, showing options: "Send an Envelope", "Sign a Document", "Use a Template" (highlighted with a red box), and "Create a PowerForm".</p>
<p>5. Under Shared Folders, choose University Corporation. Check the box for either Special Project Agreement (Campus Program Renewal) or Special Project Agreement (Scholarship Renewal). When you are done, click ADD SELECTED.</p>	 <p>The screenshot shows the "Select Template" dialog box. On the left, under "Shared Folders", the "University Corporation" folder is selected and highlighted with a red box. A red arrow points from this folder to the list of templates on the right. The list contains four templates, all owned by Cheryl Leung. The first two templates are "Special Project Agreement (New Campus Program)" and "Special Project Agreement (Scholarship Renewal)". A red box highlights the "ADD SELECTED" button at the bottom left of the dialog.</p>

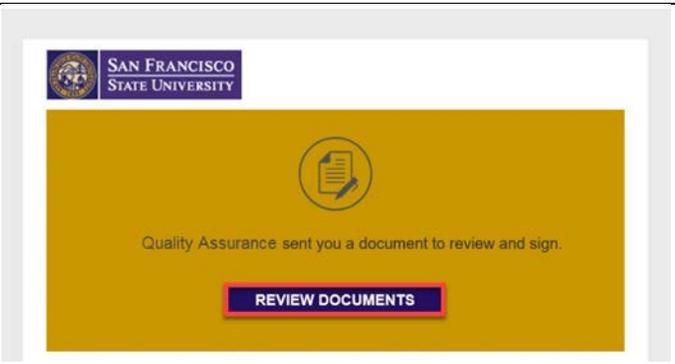
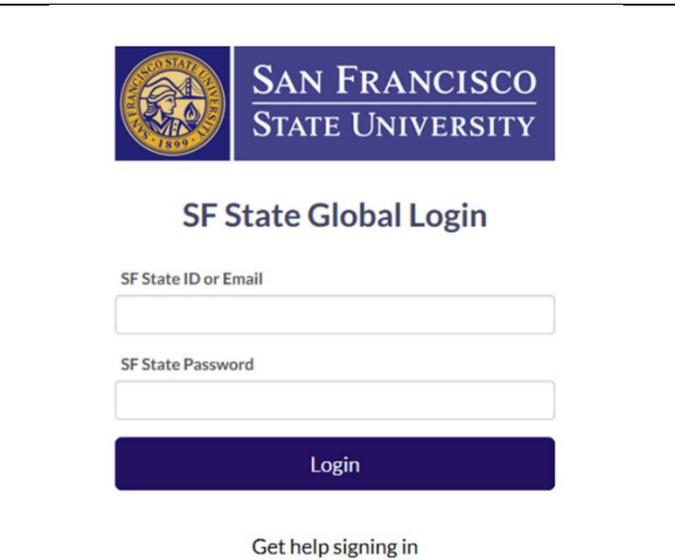


Steps	Examples
<p>6. Assign recipient contact information (e.g. add yourself as Requestor). If there is only one authorized signer, you may remove any unnecessary recipient by hovering over the right side of the recipient and clicking on the X to delete them and their assigned fields. For more information, please see http://docuSign.sfsu.edu/content/added-or-remove-recipients-workflow-template.</p>	
<p>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.</p>	
<p>8. Click SIGN NOW and then CONTINUE in DocuSign.</p>	
<p>9. Select START to begin filling out required information on the Special Project Agreement.</p>	

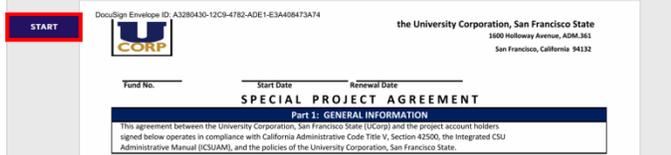


Steps	Examples
10. Click FINISH when you are done.	
11. When the transaction is completed, you will receive a DocuSign email notification with the signed document and transaction summary attached. You may also access the signed document in your DocuSign account by selecting VIEW COMPLETED DOCUMENT .	

Procedures for Signers

Steps	Examples
1. To access the Special Project Agreement, open the DocuSign email and select REVIEW DOCUMENTS .	
2. 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.	



Steps	Examples
<p>3. Select START to begin reviewing the Special Project Agreement.</p>	
<p>4. Click FINISH 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 VIEW COMPLETED DOCUMENT.</p>	