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

Business Process Guide: Special Project Agreement (Renewal) in DocuSign

Overview

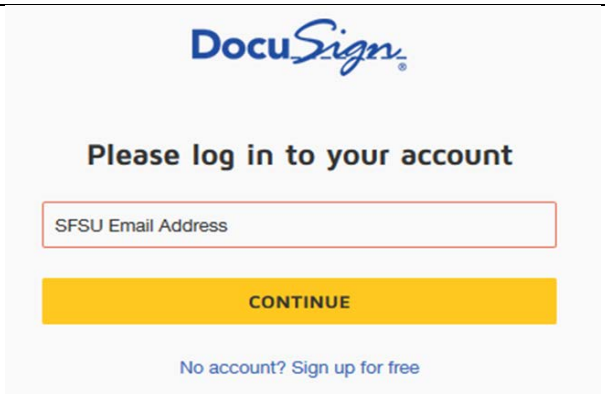
This document provides step by step instructions to complete the Special Project Agreement through DocuSign.

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 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**.	

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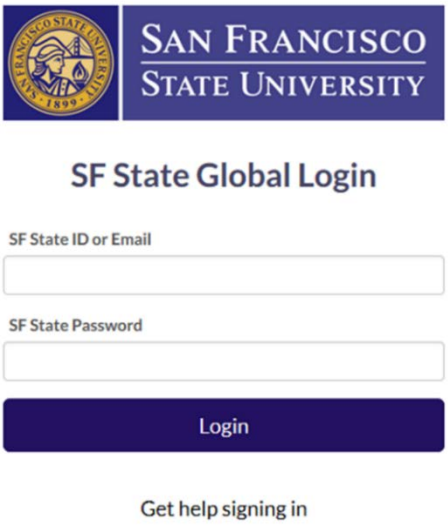
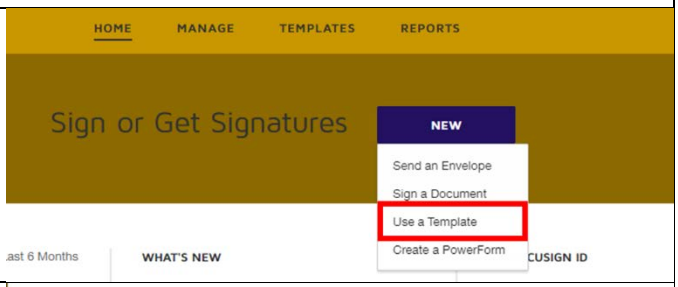
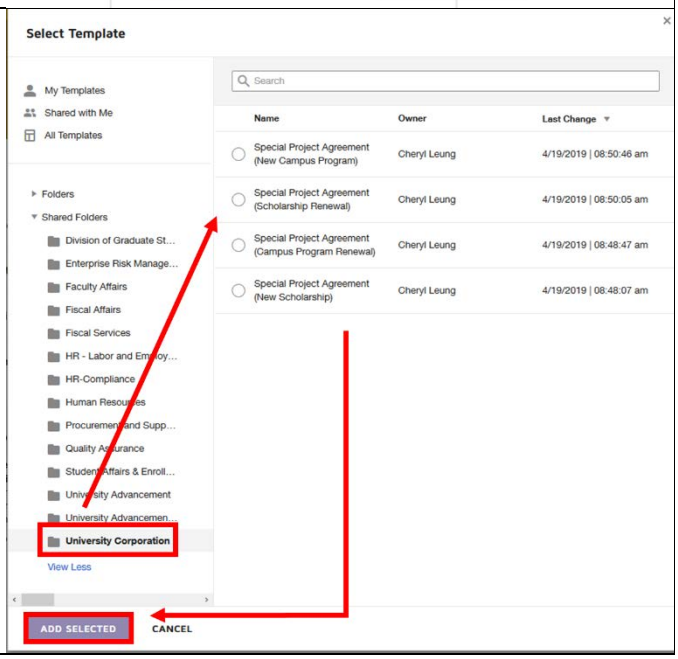
Steps	Examples
3. Enter your **San Francisco State email address** & select **CONTINUE**. Enter your San Francisco State ID or email address and password to access your DocuSign account.	
4. From the DocuSign homepage, click on the **NEW** button and then select **USE A TEMPLATE** from the drop down menu.	
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**.	

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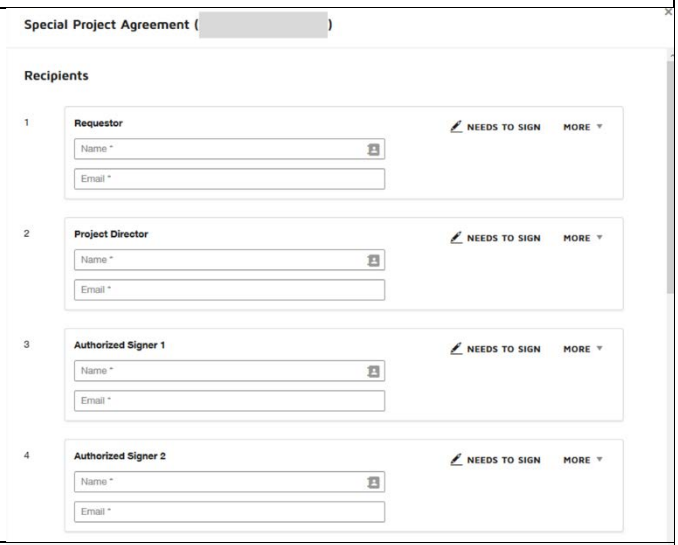
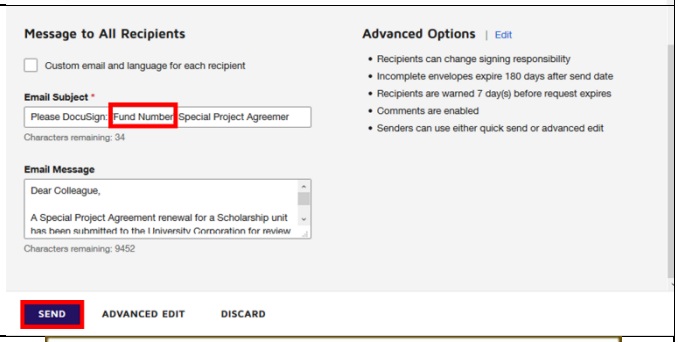
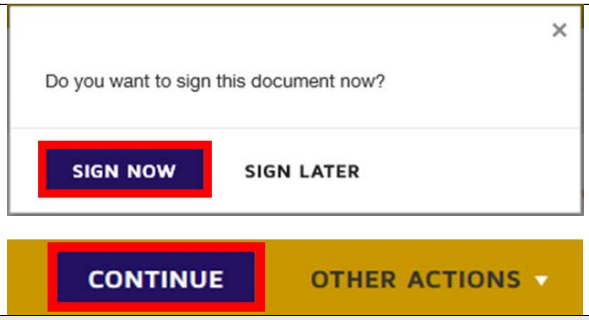
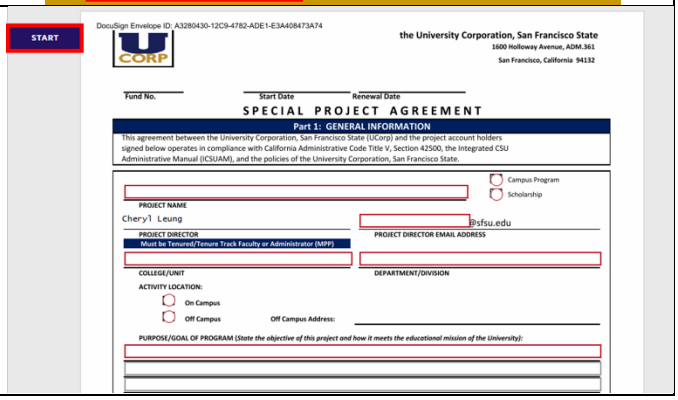
Steps	Examples
6. Assign recipient contact information (e.g. add yourself as **Requestor**). If there is only one authorized signer, you may remove any unnecessary recipient by hovering over the right side of the recipient and clicking on the **X** to delete them and their assigned fields. For more information,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

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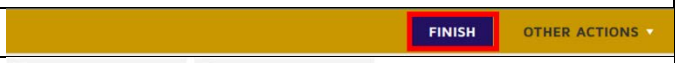
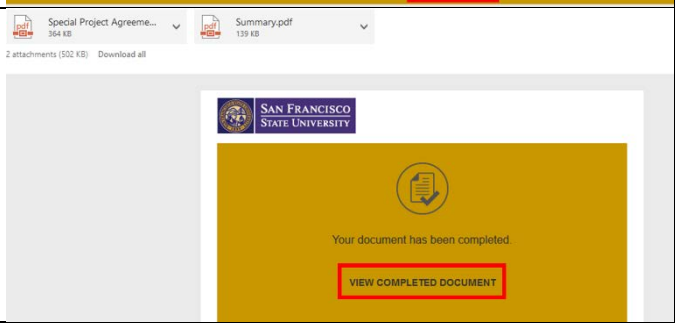
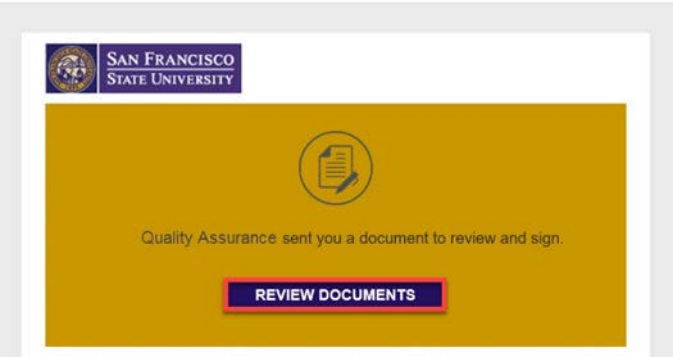
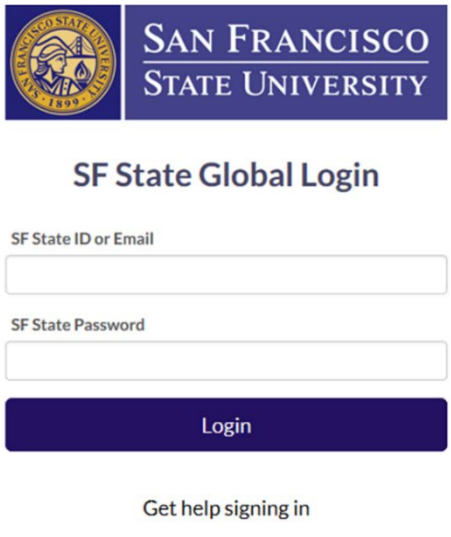
Steps	Examples
10. Click **FINISH** when you are done.	
11. When the transaction is completed, you will receive a DocuSign email notification with the signed document and transaction summary attached. You may also access the signed document in your DocuSign account by selecting **VIEW COMPLETED DOCUMENT**.	

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.	

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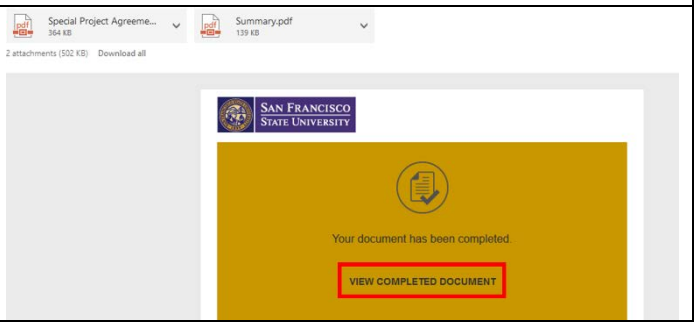
Steps	Examples
3. Select **START** to begin reviewing the Special Project Agreement.	
4. Click **FINISH** at the top right to complete your review of the document.	
5. When the transaction is completed, you will receive a DocuSign email notification with the signed document and transaction summary attached.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