Adobe Sign
Step by Step Guide

How to route pafs for signatures electronically

What is adobe sign?

Adobe Sign, an **Adobe** Document Cloud solution **is** a cloud-based, enterprise-class e-signature service that lets you replace paper and ink signature processes with fully automated electronic signature workflows. With it, you **can** easily send, **sign**, track, and manage signature processes using a browser or mobile device.

Please watch this tutorial video for an overview

https://www.youtube.com/watch?v=va1o7mSrzLs&t=91s

Faculty Pafs

1) Create a paf

2) All information in yellow must be complete

3) Pafs must include a valid budget code

4) Hourly pafs must include total hours and total dollars

Classified & Management Pafs

1) Create a paf

2) All information in yellow must be complete

3) Pafs must include a valid budget code

SANTA ROSA JUNIOR COLLEGE

Contact Danielle Donica or Linda jay for PAF #

PAF #_20-9876_____

☒ CLASSIFIED / ☐ MANAGEMENT
PERSONNEL ACTION FORM

NAME   Rhee   Glenn   R   EID 002196
LAST   FIRST   M.I.   (Employee ID)

START DATE: 7.1.20XX   END DATE: 12.31.20XX

TYPE OF ACTION	FROM	TO

☐ EMPLOYMENT
  ☐ NEW HIRE
  ☐ RE-HIRE
    LAST MO/YR. WORKED _____
	DEPARTMENT
	English
		DEPARTMENT
		English

☐ TERMINATION
  ☐ RESIGNATION
  ☐ RETIREMENT
  ☐ DISMISSAL
  ☐ LAYOFF
  ☐ DEATH
  ☐ RELEASE DURING PROBATION
	CLASSIFICATION
	
	Administrative Assistant II
		CLASSIFICATION
		
		Administrative Assistant II

If Grade/Step are unknown, leave blank

☒ CHANGE OF STATUS
 ☐ CHANGE OF HRS/MOS.
 ☐ TEMPORARY
  ___INCREASE/___DECREASE
 ☐ TRANSFER
 ☐ PROMOTION
 ☐ DEMOTION
 ☐ LEAVE OF ABSENCE
  TYPE OF LEAVE _____

☐ SUSPENSION
☒ OTHER _Working Out of Class__

☐ LONGEVITY
☐ SHIFT DIFFERENTIAL

FROM:
GRADE/RANGE __K__ STEP __3__
LONGEVITY _____
SHIFT DIFFERENTIAL _____
BILINGUAL STIPEND _____
OTHER ____0_____
BUDGET CODE :
10-00-00-1234-4567-0000____ _100_%
_____ ____%
_____ ____%

PERCENT WORKED ___100___%

PAY RATE $_____ ☐ HR ☐ MO
SALARY SCHEDULE: ___20XX/XX__
HRS/WK __40____ HRS/DAY _____
MONTHS _____12_____
HOURS OF WORK _____

TO:
GRADE/RANGE __K__ STEP __3__
LONGEVITY _____
SHIFT DIFFERENTIAL _____
BILINGUAL STIPEND _____
OTHER _5% WOOC at Range N/3 _
BUDGET CODE :
_10-00-00-1234-4567-0000___ __50_%
_10-00-00-8910-4567-0000-01_ __50_%
_____ ____%

PERCENT WORKED __100___%

PAY RATE $_____ ☐ HR ☐ MO
SALARY SCHEDULE: _20XX/XX __
HRS/WK _40_____ HRS/DAY _____
MONTHS _____12_____
HOURS OF WORK _____

FOR HR USE ONLY

HR will complete/confirm Pay Rate(s)

PROBATIONARY PERIOD - EXPIRES: STEP INCREASE DUE:

REMARKS:
Working Out of Class to cover Executive Assistant, position currently vacant. Request for Out-of-Classification Compensation form attached.

Reason is required

PAF ORIGINATOR: Linda Jay, HR   PAYROLL DATE:

Approvals - *PLEASE DO NOT SIGN IN BLACK INK*

DEPARTMENT CHAIR/SUPERVISOR	DATE	VICE PRESIDENT	DATE
DEAN/DIRECTOR	DATE	PRESIDENT	DATE
DEAN	DATE	BUDGET	DATE
VICE PRESIDENT	DATE	HUMAN RESOURCES	DATE

BOARD DATE: _____

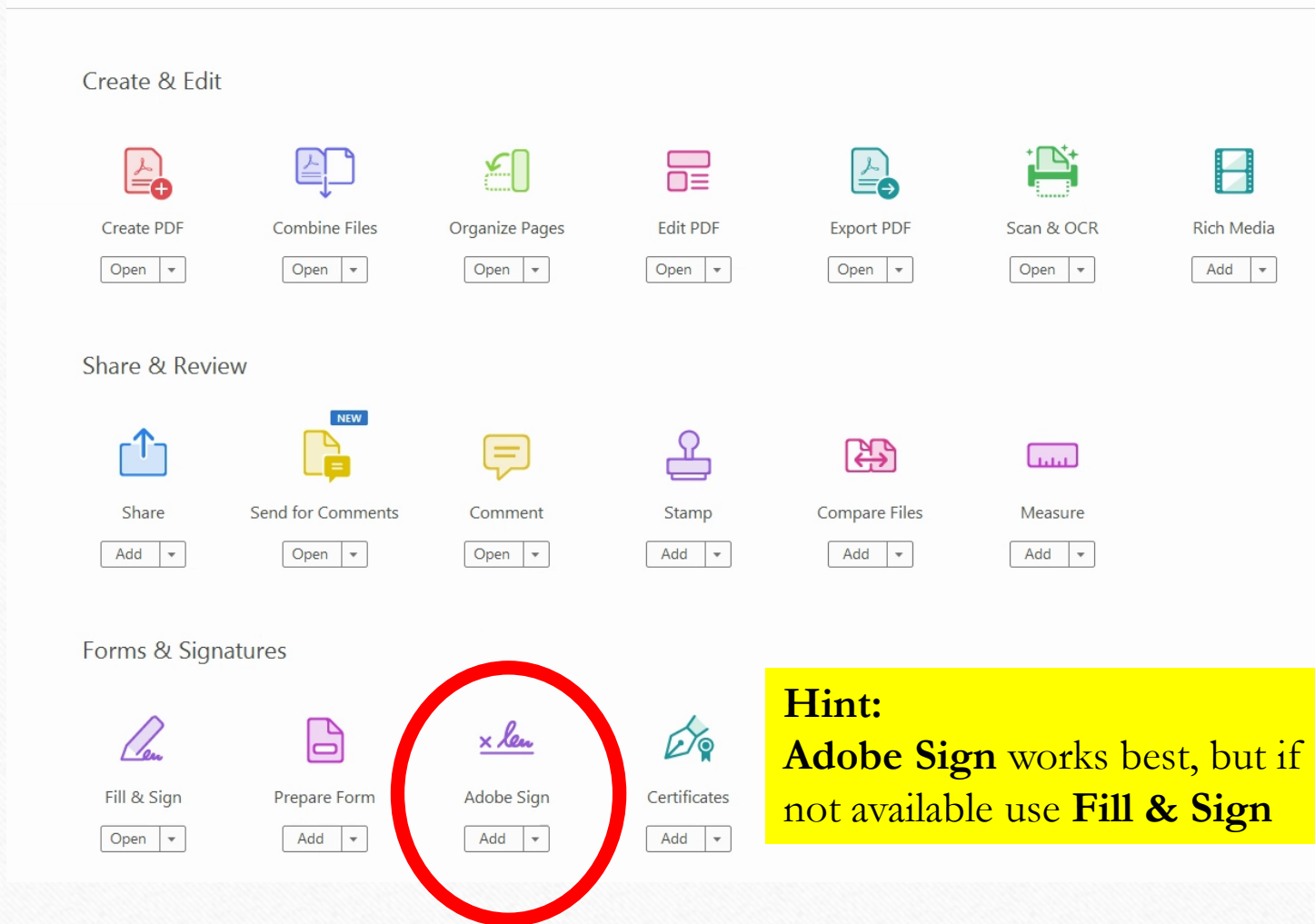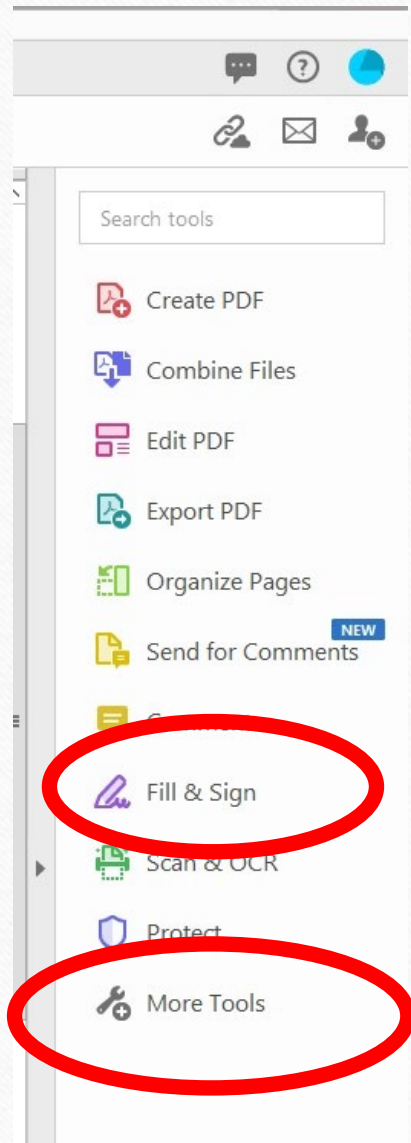S:\HR Executive Assistant\Forms on Website\PAF Classified & Management 7.1.15.doc

In your adobe document this menu is available on the right side.

Select more tools & **Adobe sign** or Fill & Sign

Hint:
Adobe Sign works best, but if not available use **Fill & Sign**

File naming for easy searching in adobe

- When you create an individual paf the file name should include the employee last name, first name, date started and paf number.

- Example:

- WaggonerGina7-26-21(22-1234)

- Master Paf number file name should include:

Department name, date started, paf number

- Example:

- Health Sciences7-26-21(22M-1234)

SANTA ROSA JUNIOR COLLEGE | POWERED BY Adobe Sign

Home   Send   Manage   Reports   Group

1) gwaggoner@santarosa.edu
2) wschultz@santarosa.edu **and*/or** sdirks@santarosa.edu (Categorical)
3) Dept chair/Director email
4) Dean email
5) lsaldana-Talley@santarosa.edu
6) shopkins@santarosa.edu

CC:
knazario@santarosa.edu
(For Academic Affairs pafs)

*If Budget on paf includes categorical and general funds the paf must be sent to both Stephanie Dirks **AND** Whitney Schultz

Tip: Email addresses are case sensitive, so always use lowercase letters for email

Recipients

Complete in Order ⊙ Complete in Any Order   Add Me | Add Recipient Group

1   gwaggoner@santarosa.edu   ✉ ⌄ Email   ✕
2   wschultz@santarosa.edu and/or sdirks@santarosa.edu   ✉ ⌄ Email   ✕
3   mferguson@santarosa.edu   ✉ ⌄ Email   ✕
4   vtam@santarosa.edu   ✉ ⌄ Email   ✕
5   lsaldana-talley@santarosa.edu   ✉ ⌄ Email   ✕
6   shopkins@santarosa.edu

CC | Hide

knazario@santarosa.edu ✕

Message

Test Paf

Please review and complete Test Paf.

Files

Add Files

Drag & Drop Files Here

Options
☐ Password Protect

Recipients' Language
English: US ▾

Sample routing path
FOR INSTRUCTOR & MANAGEMENT PAFS

- PAF ORIGINATOR (Administrative Assistant/Dept)

- HUMAN RESOURCES (**Gina Waggoner** for accuracy check)

- BUDGET (Whitney Schultz and/or Stephanie Dirks-Categorical)

- DEPARTMENT CHAIR/DIRECTOR

- DEAN

- VICE PRESIDENT

- HUMAN RESOURCES FINAL (Sarah Hopkins)

CC:

    Academic Affairs Pafs (Karolina)

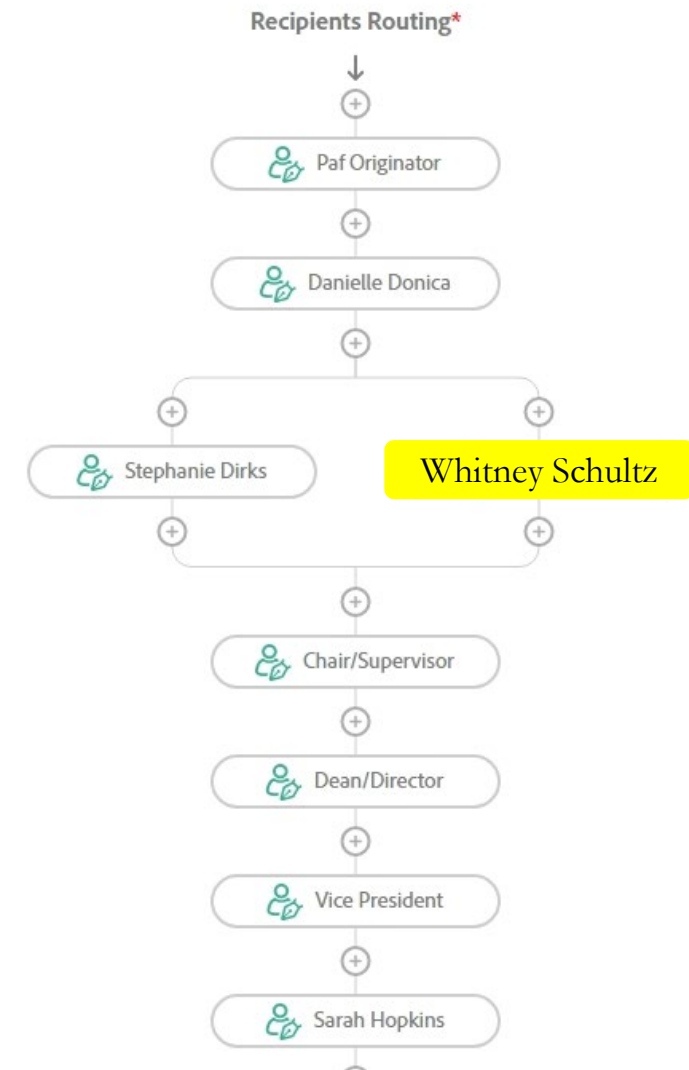   Employee for final copy at end (Optional)

Recipients Routing*

↓

Paf Originator

Gina Waggoner

Stephanie Dirks   Whitney Schultz

Dept Chair

Dean

Vice President

Sarah Hopkins

Sample routing path
FOR CLASSIFIED PAFS

- **CLASSIFIED PAFS**

- PAF ORIGINATOR (Administrative Assistant/Dept)

- HUMAN RESOURCES (**Danielle Donica** for accuracy check)

- BUDGET (Whitney Schultz or/and Stephanie Dirks-Categorical)

- DEPARTMENT CHAIR/SUPERVISOR

- DEAN/DIRECTOR

- VICE PRESIDENT

- HUMAN RESOURCES FINAL (Sarah Hopkins)

CC:
   Linda Jay, HR

Recipients Routing*
↓
Paf Originator

Danielle Donica

Stephanie Dirks   Whitney Schultz

Chair/Supervisor

Dean/Director

Vice President

Sarah Hopkins

List of email recipients are in the drop down on right side.

Select name

Assign next signature

RECIPIENTS

rholcomb@santarosa.e... ∨
(Signer)

Signature Fields ∧

Signature

Initials

Signature Block

Stamp

Signer Info Fields ∨

Data Fields ∨

More Fields ∨

Transaction Fields ∨

1) Select **next** name (drop down)

2) Select **next** signature & drag & drop on field on paf

3) Repeat until all signatures placed

PAF ORIGINATOR: *Linda Jay, HR   PAYROLL DATE: 5/6/20 glw

Approvals - *PLEASE DO NOT SIGN IN BLACK INK*

*Signature

DEPARTMENT HEAD OR AUTHORIZED   DATE   VICE PRESIDENT   DATE
REPRESENTATIVE

*Signature

DEAN   DATE   PRESIDENT   DATE

    HUMAN RESOURCES   DATE

BUDGET   DATE   BOARD DATE: 6/9/20

S:\HR Executive Assistant\Forms on Website\PAF - Faculty\PAF Faculty 9.1.16.doc

☐ Save to document library

Send

Reset Fields

Assign remaining signatures & send

RECIPIENTS
Sarah Hopkins (shopki... ∨
(Signer)

Signature Fields ∧

Signature

Initials

Signature Block

Stamp

Signer Info Fields ∨

Data Fields ∨

More Fields ∨

Transaction Fields ∨

1)Select name (drop down)

2)Select signature & drag & drop on field on paf

3)Repeat until all signatures placed

PAF ORIGINATOR: Linda Jay, HR   PAYROLL DATE: 3/6/20 gjw

Approvals - *PLEASE DO NOT SIGN IN BLACK INK*

Signature   Signature

DEPARTMENT HEAD OR AUTHORIZED   DATE   VICE PRESIDENT   DATE
REPRESENTATIVE

DEAN   DATE   PRESIDENT   DATE

Signature   Signature

DEAN   DATE   HUMAN RESOURCES   DATE

Signature

BUDGET   DATE   BOARD DATE: ___ 6/9/20

S:\HR Executive Assistant\Forms on Website\PAF - Faculty\PAF Faculty 9 1 16 doc

☐ Save to document library

Send

Reset Fields

4) When all signatures assigned, select send

Once submitted, this is an example of what you will appear on your screen

"ShimizuG5-6-20 glw" has been successfully sent for signature

A copy has also been sent to you at gwaggoner@santarosa.edu for your records.
"ShimizuG5-6-20 glw" was sent for signature to Regina Guerra (rguerra@santarosa.edu),
rholcomb@santarosa.edu, lsaldana-talley@santarosa.edu, and Sarah Hopkins (shopkins@santarosa.edu).
They will complete "ShimizuG5-6-20 glw" in order, one after the other.
As soon as the agreement is complete, all eligible parties will be e-mailed PDF copies.

Reminders
Reminders sent until completion: Every day

You will be alerted if:

• The document you sent has **not been viewed by today at 11:27 PM**.
• The document you sent has **not been signed by May 7 at 3:27 PM**.

Change alert settings

All agreements that are not completed within 365 days will be automatically expired.

This is a sample of the Confirmation email you will receive when document starts routing

Adobe Sign <echosign@echosign.com> | Saldana-Talley, Jane; Hopkins, Sarah; + 2 ▾ 📎 1 | 4/11/20

[External] AFA pafs between FCCC - Santa Rosa Junior College (Sonoma), L. Jane Saldana-Talley, Li...

ℹ️ If there are problems with how this message is displayed, click here to view it in a web browser.

📄 AFA pafs - signed.pdf
3 MB

File name changed to-signed (Final signed copy emailed to you)

Adobe Sign

AFA pafs between FCCC - Santa Rosa Junior College (Sonoma), L. Jane Saldana-Talley, Linda Close, and 1 more is Signed and Filed!

This is the email you receive at the end of processing.

The file name will change to "signed" and all parties that signed document or were CC on the routing will receive a final copy of the signed paf.

To: L. Jane Saldana-Talley, Sarah Hopkins, Linda Close, and Gina Waggoner

Attached is a final copy of **AFA pafs**.

Copies have been automatically sent to all parties to the agreement.

You can view the document in your Adobe Sign account.

Why use Adobe Sign:

- Exchange, Sign, and File Any Document. In Seconds!
- Set-up Reminders. Instantly Share Copies with Others.
- See All of Your Documents, Anytime, Anywhere.

Signed & Filed! Routing is now complete

Deeper Dive into Adobe Sign

Tracking pafs and sending reminders using Adobe dashboard

For the best user experience in Horizon please use Chrome Browser

To access your Adobe dashboard go to:

https://santarosajc.na1.documents.adobe.com

https://www.adobe.com/

Type in your SRJC user name

Example: gwaggoner

Type in your SRJC Network Password

Select Document Cloud

Go to Adobe Sign

This is the main startup menu on the Adobe Dashboard

From the **Manage** screen in Adobe Dashboard you can track the status of your pafs & send reminders

Home   Send   Manage   Reports   Group   Gina ▾

Your agreements   ⏳ Filters   🔍 Search for agreements and users...

STATUS

In Progress (3)   **In Progress**

Waiting for You (0)   RECIPIENTS   TITLE   STATUS   MODIFIED

Completed   Regina Guerra   ShimizuGS-6-20 glw   Out for Signature   5/6/2020
                         0 of 4 completed
Canceled
                         Sarah Hopkins   DPS-3215E (Batch) glw   Out for Signature   5/6/2020
Expired   3 of 4 completed

Archived   Robert Ethington   EpsteinB05-06-20 glw (Revised)   Out for Signature   5/6/2020
                         1 of 5 completed

How to Cancel a paf (During Routing)

As a paf originator you cancel the paf **before** it is fully signed off. In the adobe sign dashboard hoover your mouse two options where the yellow circle is on my document Open and Remind appear.

If you select **Open** this menu opens on the right side of your pdf. Select cancel.

FOR ASSISTANCE, QUESTIONS, OR TATRACKING:

(Full-Time Faculty, Adjuncts or Management Pafs)

Contact: Gina Waggoner
HR Specialist- Systems & Compensation
Direct: (707) 527-4786
gwaggoner@santarosa.edu

(Classified, Professional Experts or STNC Pafs)

Contact: Human Resources Technicians
        Linda Jay (707) 527-4817
        ljay@santarosa.edu

        Danielle Donica (707) 527-4785
        ddonica@santarosa.edu

Resize your pdf
By using the +/-
buttons circled in
red.

This button
allows you to
download the
document

If Adobe is crashing, please contact Bill Wagy in IT to have your Adobe license updated.
His email is wwagy@santarosa.edu

For additional resources please check out Adobe help section

https://helpx.adobe.com/sign/user-guide.html

https://helpx.adobe.com/sign/tutorials.html