

## SENDING AN AD HOC DOCUMENT FOR SIGNATURE ONLY

You can send a document to a recipient for a signature. Optionally, you can add fields to make the document fillable. These instructions will walk you through the basic steps for sending a document for signature.

1. Open a web browser.
2. In the address bar, type the following: <https://adobesign.csub.edu>
3. When the page opens,
  - Enter your email address
  - Click Continue
4. On the account selector page, click Company or School Account
5. On the CSU Bakersfield authentication page,
  - Enter your NetID and Password
  - Click LOG IN
6. When the Adobe Sign page opens, click the **Send** tab



7. The Participation Order allows you to control whether the recipients must sign in the order you entered their email address or in any order.

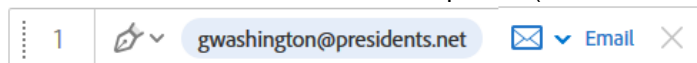
If you want the recipients to fill and sign the form in any order, click the button to slide it to Complete in Any Order.



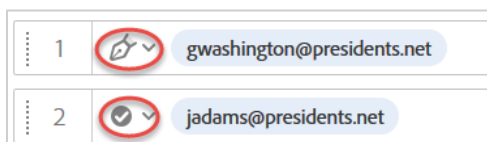
Otherwise, leave it set to Complete in Order




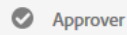
8. Enter the email addresses for the recipients. (Click the X to remove a recipient)



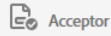
9. For each recipient, use the drop down menu to select the recipient's role. The table below describes the different roles.



<b>Signer</b>	 Signer	Completes the document and signs
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**Approver**

Reviews and approves the document, may complete fields on the document, but are not required to sign it.

**Acceptor**

Required to accept the document and may complete fields on the document

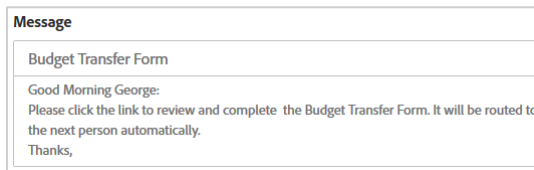
10. Leave the Identity Verification set to **Email**.

The Identity Verification ensures that the recipient's identity is verified using one of the selected methods. The recommended selection is Email.



11. For the Message,

- In the **Agreement Name** box, enter a subject for your email
- Enter your message for the email



12. Click **Add Files** to add your documents. (You can also drag and drop the files)



13. On the Select Files screen, click **Choose Files from my Computer**

14. Navigate to the desired document and click **Open**

15. Your selected documents will appear in the Files section. You can click Add Files to add more documents. *To remove a document, click the X.*



16. (Optional) Make selections from the Options section

*From the Options section, you can password protect your document, set a completion deadline date, and set a reminder. For more information about these options, see the next section.*

17. When you are finished adding documents, click **Next** button

18. Adobe Sign will process your document.

19. (Optional) You can convert your document to a fillable form, if necessary, by adding fields manually for each recipient or using the auto detection feature.

- To add fields manually, skip to the Adding Fields Manually section.
- To use the Auto Detection, skip to the Auto Detecting Fields section.

20. Click **Send** (lower left hand corner).

For more information, please visit the [Adobe Sign Resources](#) page or refer to the [Adobe Sign Basics QRG](#).