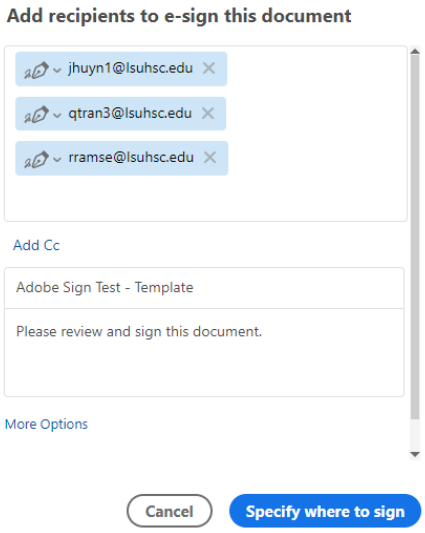
Adobe Sign Instructions

Accessing Adobe Sign

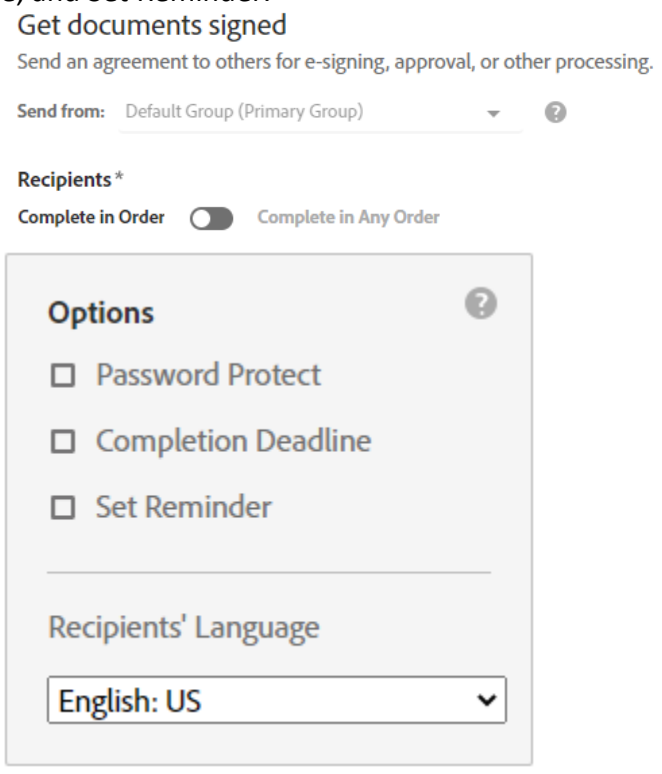
- Setting up an Adobe Sign account and frequently asked questions
  - https://www.lsuhsc.edu/admin/it/helpdesk/adobesign/
- Web Portal
  - https://documents.adobe.com/public/login
- Adobe Acrobat Desktop Program
  - Adobe Acrobat is available through Adobe Creative Cloud

Requesting E-signatures

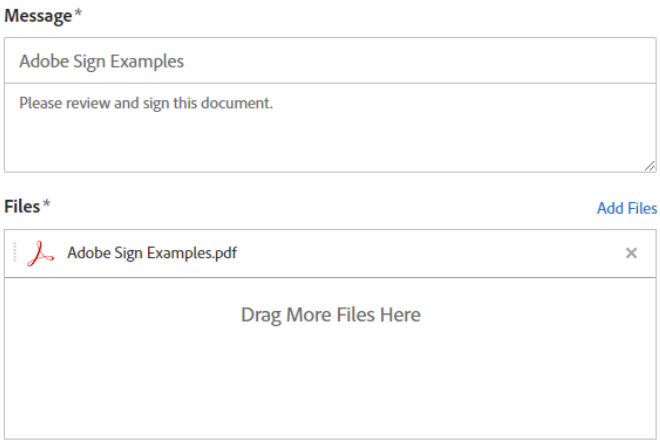
- Using Adobe Acrobat Desktop Program
  - Open the PDF using Adobe Acrobat.
  - Select **Request E-signatures** from the right-side menu.
  - Type in the e-mail addresses for all involved individuals
    - Add yourself to the document if you need to sign the document.



    - User Roles
      - Next to each email address, there is an icon to indicate the role the user will have with the document. The default setting is Signers. Options are:
        - Signers
          - Individuals that sign the document.
        - Approvers
          - Signing isn't required. They can fill out any data fields assigned to them. Main role is to say "okay" so the file can be sent to the next person.
        - Acceptor

        - Same as Approvers except they acknowledge document receipt and their “okay” is not necessary.
    - Form Filler
        - Ability to fill out fields on the form assigned to them. A signature is not required.
    - Delegator
        - Determines the next person that should interact with the document.
- Select **More Options**
    - This area gives options like specifying if the document must be signed in a specific order, password protection, Completion Deadline, and Set Reminder.
    - 

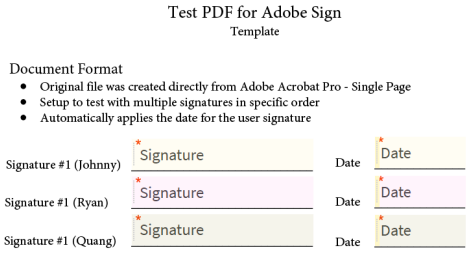
    - The subject header and body content of the email the users will receive are also specified here.

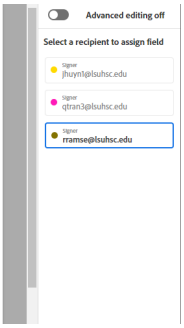


- Make sure the **Preview & Add Signature Fields** is selected at the bottom.
- Select **Next** when ready to continue.

▪ Select **Specify where to send** when ready to go to the next screen.

- The document will load, and a new screen will show up to place the signature and date fields.
  - For all options below, the assigned user field and the fields on the document will be color coded to match each other.
  - **Advanced editing off** option selected. (Most Common)
    - Select the user from the menu on the right-side then select the fields in the document area which will apply to the user.





    - Select **Sign, then Send** located at the bottom right when ready to continue.
  - **Advanced editing on** option selected.
    - A menu of options will show up beneath the recipient's name. Select an option and drag it to the document to place the field. Here is a list of the more commonly used fields.
      - Signature Fields
        - Signature
        - Initials
        - Signature Block
          - Signature field and email address combined.

                - Email address part is auto completed by Adobe when sent for signature.
            - Stamp
                - Digital stamp, like an official seal.
        - Signer Info Fields
            - Title
                - Job title
            - Name
                - Adobe auto completes this field when sent for signature.
            - Date
                - Adobe auto completes this field when sent for signature.
            - Company
                - Adobe will guess at company name.
            - Email
                - Adobe auto completes this field when sent for signature.
        - More Fields
            - File Attachment
        - Transaction Fields
            - Participation Stamp
                - Adobe assigned stamp.
            - Transaction Number
                - Adobe assigned tracking number for the document.
    - Select **Sign, then Send** located at the bottom right when ready to continue.
- The document is prepared and sent for signature in the specified order. If the option to not specify order to send the document is selected, all recipients will receive the document to sign at the same time.
- Signers will get an email when it is their turn to sign. The email will come from adobesign@adobesign.com. This is an external email and will have the ***EXTERNAL EMAIL: EVALUATE*** warning.

- Adobe Sign web portal steps are similar to the Adobe Acrobat format mentioned above.
    - Select **Send** from the horizontal menu across the top of the web page to start.
    - Make sure to select **Preview & Add Signature Fields** before hitting the **Send** button.

Document Status

- An email is sent when there is a status change to the PDF file like the document is signed and sent to the next signer.

- In the Adobe Sign web portal, under **Manage** from the horizontal menu at the top of the web page, current and past document status are displayed.
    - Some categories are In Progress, Waiting for you, Completed, Canceled, and Expired.

Bulk sends

- It is possible to send a PDF for multiple people to complete their own form.
    - Examples could be forms students complete during student orientation.
- Bulk sends are done through the Adobe Sign web portal.

Other Notes

- When sending to a distribution group or shared mailbox, only the first signature is registered. One signature per email address.
- If multiple documents are uploaded at the same time, Adobe Sign will combine all documents into one PDF file.
- Adobe Sign will convert Word documents to PDF in the web portal.