

Submitting Travel Expense Claims with Adobe Sign

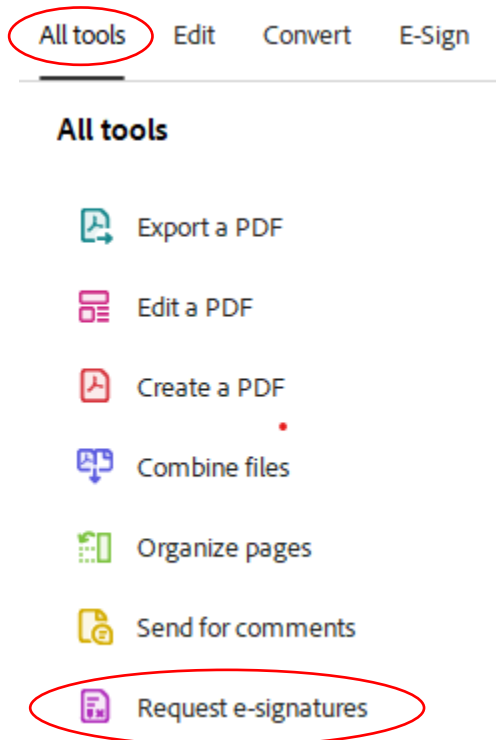
Note 1: Prior to submitting any Expense Claims through Adobe, you must ensure that you first have Adobe Acrobat Sign on your computer. If you do not have Adobe Sign, submit IT Helpdesk ticket to request Adobe Sign access to be granted.

Note 2: All Expense Claims must be titled in the following format – **Traveler's Name, Traveler's V Number, and Date of Travel (Return Date)**. If Expense Claim Documents are not labeled as such, they will be returned to be corrected.

Note 3: Any Expense Claims submitted outside of 30 days from return date of travel, submitter must request President's signature approval, along with attached written explanation as to why Expense Claim is being submitted late.

***Documents are combined & saved with appropriate Expense Claim Name format prior to moving to step 1.**


Step 1: Open Adobe Acrobat Sign – Select **Request e-signatures** from **All tools** dropdown.




Step 2: Enter recipient's email addresses in the following order - Ernest Beasley (ernest.beasley@volstate.edu); the Traveler; Traveler's Supervisor; Traveler's VP; VP of Business &

Finance, Brett Stoller brett.stoller@volstate.edu; and lastly, President Tostenson if necessary (Expense Claims outside of 30 days of return date, or a direct report of the President). Once email addresses have been inputted, select **Specify where to sign**.

Add recipients to e-sign this document

 ernest.beasley@volstate.edu X

 brett.stoller@volstate.edu X

Add Cc

Process for Travel Expense Claims - Electronic Signatures (old)

Please review and sign this document.

More Options

Your file will be uploaded for e-signing. Anyone you share the link with can view the file.

Cancel

Specify where to sign

Step 3: Assign Initial box for B&F Admin (Ernest Beasley) by dragging box over to top-right corner of Expense Claim document. Then switch over to each signer in order & drag over the E-signature box and place on the appropriate line of Expense Claim Form. Each signer will have a color assigned to their signature. Please make sure you have the correct individual selected prior to dragging & placing their signature box.

The image shows a screenshot of an Adobe Sign document interface. On the left, there is a sidebar with two main sections: "RECIPIENTS" and "Signature Fields".

RECIPIENTS: This section lists two signers:

- Ernest Beasley (me) (Signer) - marked with a pink square icon.
- Ernest Beasley (me) (Signer) - marked with a pink square icon and a checkmark, circled in red.
- Brett Stoller (Brett.Stoll... (Signer) - marked with a green square icon.

Signature Fields: This section lists four fields:

- Signature - circled in red, with a blue arrow pointing to the "Signature" field in the document.
- Initials - circled in red, with a blue arrow pointing to the "Init" field in the document.
- Signature Block
- Stamp

The document itself is a form with the following elements:

- At the top right, "Mileage Rate (Effective 1/1/2025)" is listed next to "\$0.700".
- Below this, there is a large grey rectangular area.
- To the right of the grey area is a small box labeled "Init" with a red asterisk icon.
- Below the grey area is a yellow rectangular area labeled "Signature" with a red asterisk icon.
- Below the yellow area is a line with the text "Approved: VP Business and Finance, Date".
- Below that is another line with the text "Approved: President, Date".

Step 4: Select Send. Once all E-signatures have been received & approval process has been completed, the Traveler's Expense Claim Document will be forwarded to Accounts Payable for processing.

Admin for B&F (Ernest) will review the Expense Claim Document for accuracy before initialing. If any issues are found, the document will be declined & returned to the originator with an explanation of exact corrections to be made. The Originator of document will resubmit once appropriate corrections have been successfully completed. An automated email generated from Adobe should be received upon e-signature completion.

* Users should manage their forms by viewing them to see where it is in routing process and reminding signers to review & approve if Expense Claim has been pending for several days. Please also make sure that all email addresses are entered correctly.

For help please contact Ernest Beasley @ ernest.beasley@volstate.edu or extension 3561.