Instructions for using Adobe Sign for Routing

1.) You must complete the Routing Sheet in its entirety using Adobe Acrobat.
2.) Save the routing sheet in the same manner as now.
3.) After the Routing Sheet is completed and saved, and all other required documents are ready, navigate to this web address for Adobe Sign, https://na2.documents.adobe.com/account/home.

**Please note, you will not be able to make any changes to the routing sheet once you start the routing process using Adobe Sign.**

4.) If you are not logged into Adobe, you will be prompted to log in. Use your O-key log in information.
5.) After you have logged in, you will be on the Adobe Sign Dashboard. Select “Get a Document Signed.”

6.) Next, you will select the recipients as signatories. Do not include yourself, as the originator of the process, you will automatically be included in all email updates. This includes the PI(s), the Department Head(s), the ADR(s). You will need to add them in the order you want them to sign. If the routing includes multiple colleges, start with the Secondary college first. (Ex. If CEAT is the Primary and A&S is Secondary, the Recipient list should include signatures from: PI #2 from A&S, Dept. Head #2 from A&S, ADR #2 from A&S, then PI #1 from CEAT, Dept. Head, #1 from CEAT, and finally the ADR from CEAT.)

7.) Add instructions to the recipients or signors. PIs will need to complete Part 3.
8.) You will need to place a check mark in the “Preview and Add Signature Fields” box before sending. The blue “Send” button will change to “Next”. Click Next.

9.) The completed Routing Sheet will be open in Adobe Sign. You will now drag the signature fields from the right toolbar onto the Routing Sheet.

10.) On the right toolbar, you should have everyone that needs to sign listed here. If you failed to include all your recipients or signatories, you will need to start over at Step 5. Select a Recipient (Signatory) (the PI is usually the first signer) from the drop down list of available recipients (these are included from the previous screen).

11.) In the “Signature Fields” section, drag the “Signature” box to the appropriate Signature line in Part 5 of the Routing Sheet. You may also drag the signature to the “Additional Investigators and Approvers Form.”
12.) Return to the list of Recipients and select the next Signatory and continue the process above until all signatories have been given a signature box on the Routing Sheet.

13.) You have a choice of saving the routing sheet to your Adobe Document Cloud.

14.) Now click “Send”.

15.) You will get a confirmation that it has been sent out to all signatories including yourself.

16.) To track the status of Routings that are waiting for signatures go to the Adobe Sign Dashboard and select “Manage”. There are many options to search or view all of your routings. You will only see routings you initiate or you are a part of.