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*Must Create an AdobeSign Account First*
In order to get an AdobeSign account, contact the ETS Help Desk by sending the required information listed on the ETS website: [http://helpdesk.sdsu.edu/echosign.htm](http://helpdesk.sdsu.edu/echosign.htm)

**WORKFLOW Internship Site Questionnaire Instructions**

**Step #1: Login to AdobeSign**

**Step #2: Get Started**
Click on Select a workflow, click on SDSU-Service Learning Agreement, and then click Start.
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Step #3: Enter Signers
You will need to enter in the emails of the signers that are blank:
Learning Activity Site Rep (Employer)
SDSU College Representative (determined by each department/college)
Step #4: Enter Document Name, Customize Message, and Send

It is recommended to enter the name of the organization before the document name so that it will be easier to identify. For example, YMCA SDSU- Service Learning Agreement. The workflow provides a prepopulated message. It is recommended that you add the name of the employer and your contact information to the bottom of the message. Also, feel free to customize the message as they will see it in the email they receive and when they open the document to sign. Then click Send.

*Please note that the Internship Site Questionnaire document is already attached to the workflow.
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Step #5: Signature Messages
After you send the iSQ, you will get a message that confirms that the document has been sent:

(Enlarged imaged from above screen)

After the employer completes the ISQ, they will see this message.
Step #6: SDSU College Representative Signs
Once the employer has completed and signed the ISQ, then the SDSU College Representative will receive an email that asks him/her to review and sign the ISQ. Please note that if the SDSU College Representative has an AdobeSign account, then the signers name will appear and only the signature will have to be entered. If the signer does not have an account, then the signer will need to enter their name and signature.

The signer will see this screen to enter his/her signature. Click the blue “Apply” box. Please note the signer can type, draw his/her signature with his/her mouse, or upload an image.

Once the signature is entered, the signer will be prompted to “Click to sign” by the blue button below in order to sign the document.
Step #7: Approval Confirmation Email and PDF Copy
Once both parties have signed the document, then both parties will receive an email that contains a PDF of the signed and approved SLA.

Organization Name SDSU-Internship Site Questionnaire between San Diego state University, me and Heather LaPerle is Signed and Filed!

To: me and Heather LaPerle

Attached is a final copy of Organization Name SDSU-Internship Site Questionnaire.

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.

To ensure that you continue receiving our emails, please add echosign@echosign.com to your address book or safe list.

Updated 1/22/18
Step #1: Login to AdobeSign
Once you have an account, go to https://secure.echosign.com/public/login?locale=en_US or http://goo.gl/o8sN1k and enter in your email and password.

Step #2: Get Started
Click on Select a workflow, click on SDSU-Service Learning Agreement, and then click Start.
Step #3: Enter Signers
You will need to enter in the emails of the signers that are blank:
Learning Activity Site Rep (Employer)
Department Chair/Director
Associate Dean
*Please note that your email and Contract & Procurement Management email will always auto populate
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Step #4: Enter Document Name, Customize Message, and Send
It is recommended to enter the name of the organization before the document name so that it will be easier to identify. For example, YMCA SDSU- Service Learning Agreement. The workflow provides a prepopulated message. It is recommended that you add the name of the employer and your contact information to the bottom of the message. Also, feel free to customize the message as they will see it in the email they receive and when they open the document to sign. Then click Send.

*Please note that the Service Learning Agreement document is already attached to the workflow.
Step #5: Enter Information
You will then be prompted to select the college and fill in the department before signing the document. Note that the Message you entered in Step #4 will show when anyone first opens the document to sign. *Please note that you no longer enter the date on page 1 of the SLA. The date is populated on page 3 when each signer signs
**Please note that the Employer now fills in the Learning Activity Site section with their legal entity name

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By clicking on the “Next required field”, you will be moved to the fillable area to complete next. (Located on the top right corner)
Step #6: Enter Your Signature
You will see this screen to enter your signature. Click the blue “Apply” box. Please note you can type, draw your signature with your mouse, or upload an image.

Step #7: Sign
Once your signature is entered, you will be prompted to “Click to sign” by the blue button below in order to sign the document.

Department Internship Contact

Heather LaPerle

Print Name

August 18, 2015

Date
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Step #8: Signature Messages
As the first signer, you will get a message that says which email the document is being sent to next:

(Enlarged image from above screen)

All signers will see the confirmation below. Please note that the note below is the last confirmation, which is seen by Contracts & Procurement and states that “Copies will be emailed to all parties”
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Workflow & Standard

Step #9: Approval Confirmation Email and PDF Copy
Once all parties have signed the document, then all parties will receive an email that contains a PDF of the signed and approved SLA.

Test Company SLA SDSU between San Diego state University, Heather LaPerle, Employer, and 3 more is Signed and Filed!

To: Employer, Heather LaPerle, Department Chair, Associate Dean, and 1 more

Attached is a final copy of Test Company SLA SDSU.

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

You can view the document in your Adobe Document Cloud account.

Why use Adobe Document Cloud:

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

To ensure that you continue receiving our emails, please add echosign@echosign.com to your address book or safe list.

Updated 1/22/18
WORKFLOW SLA Amendment Instructions

Step #1: Login to AdobeSign
Once you have an account, go to https://secure.echosign.com/public/login?locale=en_US or http://goo.gl/oBsN1k and enter in your email and password.

Step #2: Get Started
Click on Select a workflow, click on SDSU-Service Learning Agreement: Amendment, and then click Start.
Step #3: Enter Signers
You will need to enter in the emails of the signers that are blank:
Learning Activity Site Rep (Employer)
Department Chair/Director
Associate Dean
*Please note that your email and Contract & Procurement Management email will always auto populate
AdobeSign: How-to Guide for Online Service Learning Agreement (SLA) Process
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Step #4: Enter Document Name, Customize Message, and Send
It is recommended to enter the name of the organization before the document name so that it will be easier to identify. For example, YMCA SDSU- Service Learning Agreement: Amendment. The workflow provides a prepopulated message. It is recommended that you add the name of the employer and your contact information to the bottom of the message. Also, feel free to customize the message as they will see it in the email they receive and when they open the document to sign. Then click Send.

*Please note that the Service Learning Agreement: Amendment document is already attached to the workflow*
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Step #5: Enter Information
Like the SLA, you will then be prompted to add information before signing the document. Unlike the SLA, there is information that you will need to obtain from the SLA Master List in order to complete. The steps to complete this process are outlined starting on the next page (Steps #5A-F). Note that the Message you entered in Step #4 will show when anyone first opens the document to sign.

This allows you to send the document to someone else if they should sign it, not sign the document (which cancels the document), or clear entered data if you would like to start over. (Located on the top left corner)

By clicking on the “Next required field”, you will be moved to the fillable area to complete next. (Located on the top right corner)
Step #5A: Access the SLA Master List
Access the SLA Master List by going to http://bfa.sdsu.edu/financial/procurement/servlearning.aspx where you will see the page below. Click on SLA Master List to view the excelsheet, which is updated once a month.

Step #5B: Find the SLA Agreement
To find the SLA that you will be amending, click on the Find & Select Box in the top right corner. The Find box will pop up and you will want to enter in the name or part of the name of the organization you are searching for and the click Find Next. For example, I enter lpl to search for LPL Financial.
Step #5C: Enter the SDSU Agreement No.
Once you find the organization’s SLA name in column C, then view column A to find the SLA Agreement number. This number will be entered in the boxes next to SDSU Agreement No., which are highlighted below. For example, I am searching for LPL Financial so I searched for lpl and find the SLA, which is SLA Agreement number 40082894.

I enter 40082894 in the top right hand corner SDSU Agreement No. box and it automatically populates the second box.
Step #5D: Enter the Amendment No.

Next view column B to find out if this is the 1st Amendment for the organization or if another SLA Amendment has been done before, which is notated with (AMEND #). For example, see the purple box below. Please note that multiple Amendments can be created for an organization in order to add more departments. For LPL Financial, there have been no previous SLA Amendments created.

Since there are no previous SLA Amendments for LPL Financial, then I will enter 1 in the Amendment No. box since this is the 1st SLA Amendment for this organization. When I enter 1 in the top right corner Amendment No. box, the four other Amendment No. boxes are automatically populated.

*Please note that if I had been creating an SLA Amendment for organization above highlighted with the purple box that already has one SLA Amendment completed per the (AMEND 1), then I would enter 2 in the Amendment No. box.
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Step #5E: Enter the Date the Original SLA was Created
Next view column B to find out the date that the original SLA was created.

For LPL Financial, the SLA was created on 4/2/12, which is entered into the dated box.

Step #5F: Enter the College and Department
Next enter your college and department in the remaining boxes.
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Step #6: Enter Your Signature
Last you will click on the Click here to sign box and the screen to enter your signature will pop up.

Click the blue “Apply” box. Please note you can type, draw your signature with your mouse, or upload an image.
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Step #7: Sign
Once your signature is entered, you will be prompted to “Click to sign” by the blue button below in order to sign the document.
Step #8: Signature Messages

You will then see a confirmation message similar to the one below:

All other signers will see a confirmation similar to the one below, except for that the note below is the last confirmation, which is seen by Contract & Procurement Management. This is why the message below states that “Copies will be emailed to all parties”.

*Please note that the example below is for an SLA, but the message will have the name of the document you sent.
Step #9: Approval Confirmation Email and PDF Copy

Once all parties have signed the document, then all parties will receive an email that contains a PDF of the signed and approved SLA Amendment.

*Please note that the example below is for an SLA, but the message will have the name of the document you sent.

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Test Company SLA SDSU between San Diego state University, Heather LaPerle, Employer, and 3 more is Signed and Filed!

To: Employer, Heather LaPerle, Department Chair, Associate Dean, and 1 more

Attached is a final copy of Test Company SLA SDSU.

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

You can view the document in your Adobe Document Cloud account.

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To ensure that you continue receiving our emails, please add echosign@echosign.com to your address book or safe list.

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Step #1: Login to AdobeSign
Once you have an account, go to https://secure.echosign.com/public/login?locale=en_US or http://goo.gl/oBsN1k and enter in your email and password.

Step #2: Get Started
Click on Send or Get a Document Signed to start the process

Step #3: Enter Signer
Enter only the Employer email

Standard Internship Site Questionnaire Instructions
AdobeSign: How-to Guide for Online Service Learning Agreement (SLA) Process
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Step #4: Upload the Document
Click Add Files. The Select Files box will open and click on Library Documents to view and select the SDSU- Service Learning Agreement and then click the blue Attach button. *Multiple documents can be attached.

Once you attach the document, you will notice that the name of the document is added to the Message title and message sections.
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Step #5: Update Message Section, Uncheck the Preview Button & Send Document
It is recommended to enter the name of the organization before the document name so that it will be easier to identify. For example, YMCA SDSU- Internship Site Questionnaire. Enter a Message to the employers, which they will see in the email they receive and when they open the document to sign. Here is a sample message:
Hello Brandy.
Thank you for offering internship opportunities for SDSU students! Please review and complete YMCA SDSU- Internship Site Questionnaire. Please let me know if you have any questions.
Heather LaPerle
Campus Internship Coordinator
SDSU Career Services
hlaperle@mail.sdsu.edu
619-594-3493

Uncheck the box next to the Preview & Add Signature Fields. If you do not uncheck this box, you will not be able to send the document and will need to start over. Then click Send.
Step #6: Confirmation Message
Since you do not need to sign the ISQ, you will see this message once you send the ISQ to the Employer.

The Employer will receive an email message prompting him/her to fill out the ISQ that looks like this:
Step #7: Approval Confirmation Email and PDF Copy
Once the Employer has completed and signed the ISQ then the Employer and Department Internship Contact will receive an email that contains a PDF of the completed and signed ISQ.
AdobeSign: How-to Guide for Online Service Learning Agreement (SLA) Process
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**Standard Service Learning Agreement Instructions**

**Step #1: Login to AdobeSign**
Once you have an account, go to [https://secure.ecosign.com/public/login?locale=en_US](https://secure.ecosign.com/public/login?locale=en_US) or [http://goo.gl/o8sN1k](http://goo.gl/o8sN1k) and enter in your email and password.

**Step #2: Get Started**
Click on Send or Get a Document Signed to start the process
Step #3: Enter Signers
First, click Add Me to make you the first signer

Second, you will need to enter in the emails of the signers in this order:
Myself (you already did this by clicking Add Me)
Employer
Department Chair
Associate Dean
Contacts and Procurement (CPM.SLA@mail.sdsu.edu)

Third, make sure to have Complete in Order bolded so that the document will first come to you to sign and then it will be sent to the employer, then department chair, then associate dean, and lastly to Contracts and Procurement for signature.

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Step #4: Upload the Document
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Here is a sample message:
Hello Brandy,
Thank you for offering internship opportunities for SDSU students! Please review and complete YMCA SDSU- Service Learning Agreement. Please let me know if you have any questions.
Heather LaPerle
Campus Internship Coordinator
SDSU Career Services
hlaperle@mail.sdsu.edu
619-594-3493

Uncheck the box next to the Preview & Add Signature Fields. If you do not uncheck this box, you will not be able to send the document and will need to start over. Then click Send.
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Step #6: Enter Information
You will then be prompted to fill out the day, month, year, college, and department before signing the document. Note that the Message you entered in Step #6 will show when anyone first opens the document to sign.

*Please note that the Employer now fills in the Learning Activity Site section with their legal entity name

This allows you to send the document to someone else if they should sign it, not sign the document (which cancels the document), or clear entered data if you would like to start over. (Located on the top left corner)

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Step #10: Approval Confirmation Email and PDF Copy
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Test Company SLA SDSU between San Diego State University, Heather LaPerle, Employer, and 3 more is Signed and Filed!

To: Employer, Heather LaPerle, Department Chair, Associate Dean, and 1 more

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