Reimbursement Request

1. Click on the Reimbursement Request link to start the form.
2. You will be prompt to log in to Adobe Sign.
    a. In the *email address line*, type in your full saclink email address, including @csus.edu (ex. xxxxx@csus.edu) *(see figure 1. for the Adobe Sign-In screenshot).*
    b. Click the **Continue** button.
    c. You will see an Adobe Sign splash screen as it routes you to the *Adobe Sign Send* page.

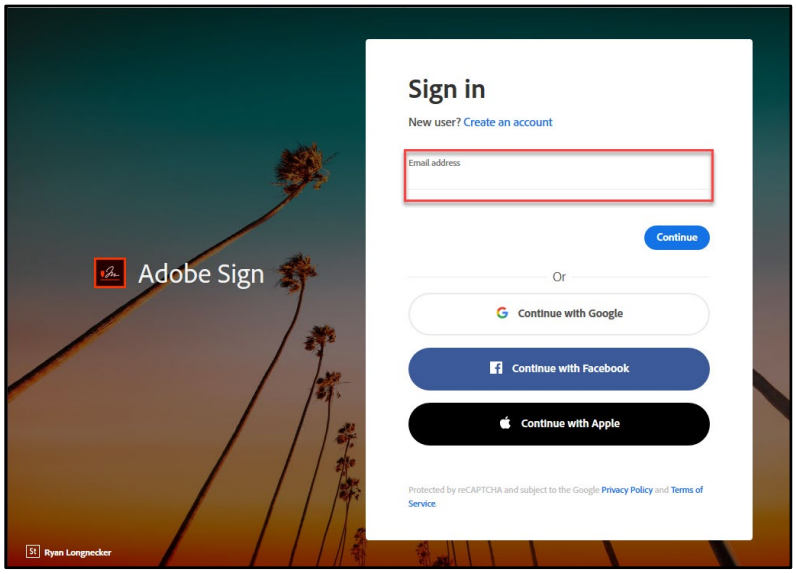

Figure 1. Adobe Sign-In screenshot

3. Once on the *Adobe Sign Send* page *(see figure 3. for the Send page screenshot)*
   a. Click *More* for a list of required information for this form.
   b. Navigate to the *Recipient* fields listed and enter the primary email address. To ensure you are using the primary email address, navigate to *directory.csus.edu* to confirm the email address.
      i. **Optional**- *Preapproval* by a designated staff may be required by your department or VP, please input the staff's email below if applicable.
      ii. **REQUIRED FIELD**- *Department Approving Official* field *(Signature must be on file in Delegation of Authority list in CFS).* **Stop here if this is an allowable requests**. If an exception continue to next steps.
      iii. **Required for exception to policy payments-** *Authorized Signer* field *(see figure 2. for the Authorized signer criteria screenshot).* If signer is the same as approving, they must sign twice. Place email in both sections.

Direct Payment Exception Requests up to $2,500 - Department's Manager or Chair shall sign the Direct Payment Requests Direct Payment Exception Requests from $2,501 to $10,000 - AVP or Dean shall sign the Direct Payment Requests Direct Payment Exception Requests over $10,000 - requires both AVP/Dean and ABA/CFO approval

Figure 2. Authorized signer criteria screenshot

      i. *Procurement* field – Required for all exceptions – use **sebastian.head@csus.edu**
      ii. *VP/CFO* field – Required if over $10,000.00 – use **machelle.martin@csus.edu** and use the CC field below to add **vp-cfo@csus.edu**.
   b. The *Accounts Payable* email address auto-populates in and you will not be able to change this.
   c. In the CC field, enter email(s) if applicable.
   d. In the *Document Name* field, after **Reimbursement Request**– type the payee name *e.g. Reimbursement Request – John Doe).*
   e. Click the **Send** button to route the form for signature.

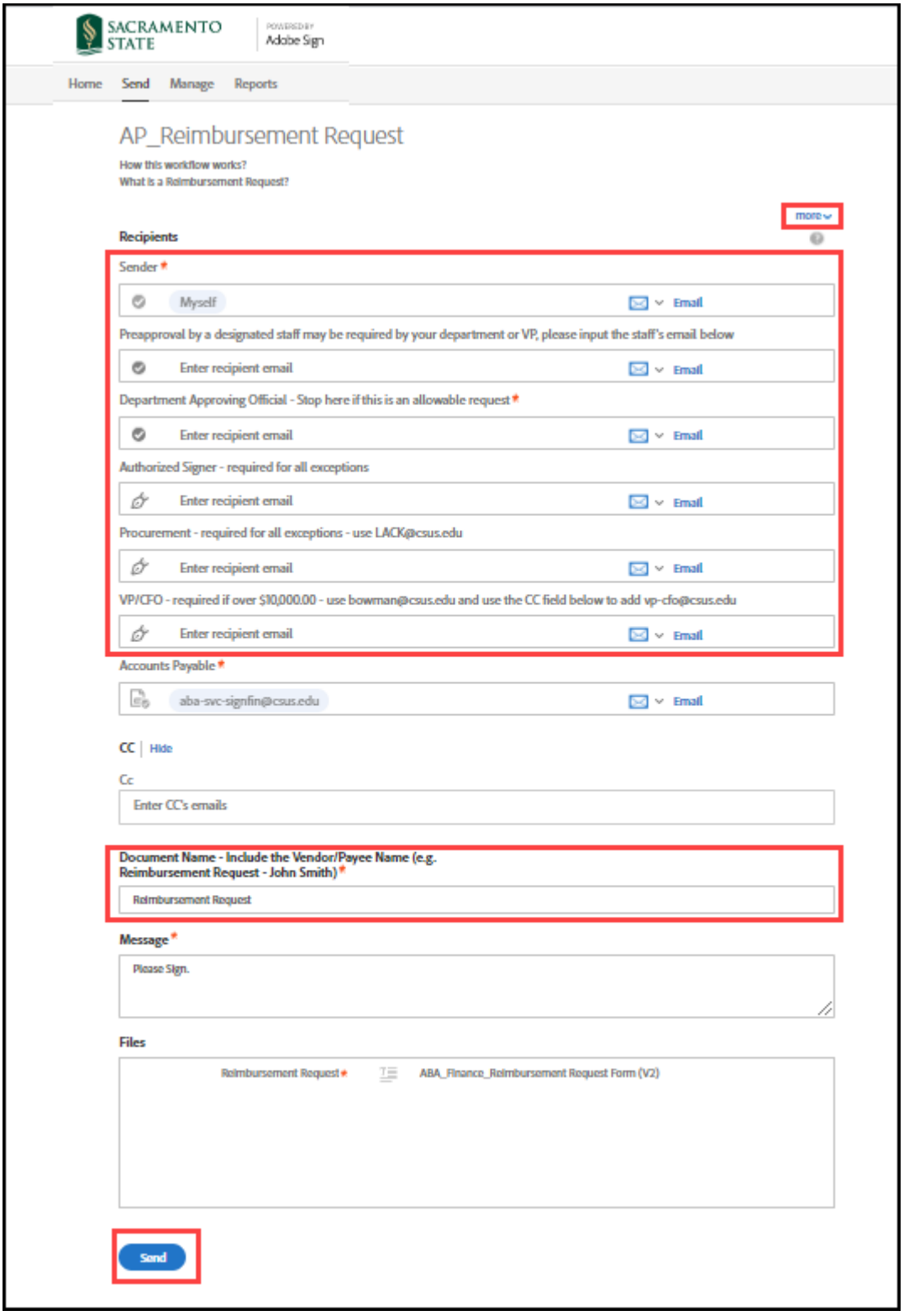

Figure 3. Send page screenshot

4. Once on the form, click the yellow tab to navigate to the required fields and type in your information (see figure 4. for the Reimbursement Request form screenshot).
    a. Navigate to the *Supporting Documents* fields. Click on *'Click..'* to attach supporting documents.
    b. In the *Justification* field, attach justification memo for purchase and payment policy exceptions only.

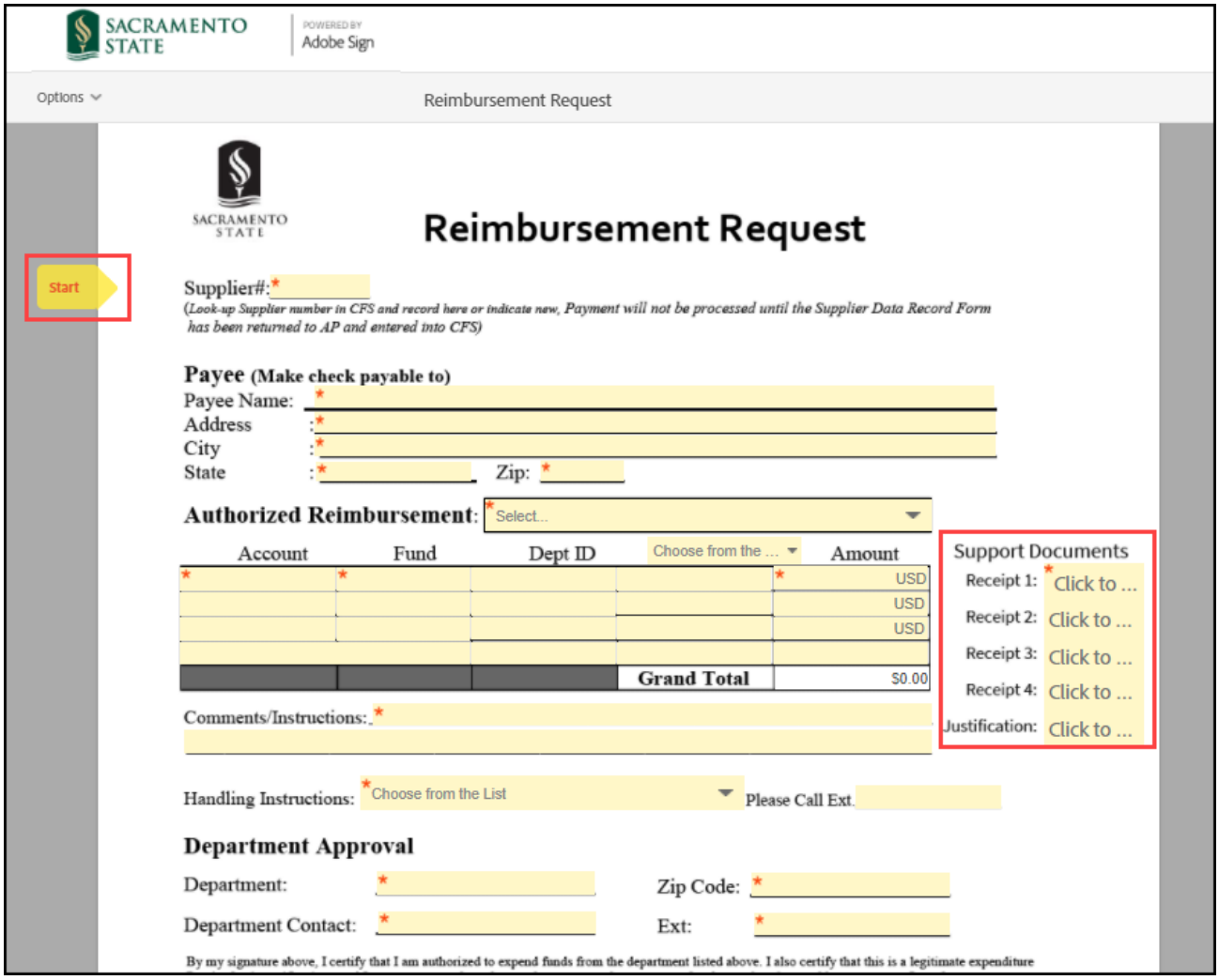

Figure 4. Reimbursement Request form screenshot

5. Once all the required fields are completed, click the blue **Click to Send** button at the bottom of your screen *(see figure 5. the Click to Send button screenshot).*

Figure 5. Click to Send button screenshot

6. A thumbnail of the form and confirmation message will display. (see figure 6. Confirmation message screenshot) This message confirms that the Reimbursement Request was sent for signature(s). You will also receive an email confirmation that the document was sent for approval. This completes your portion of the workflow.

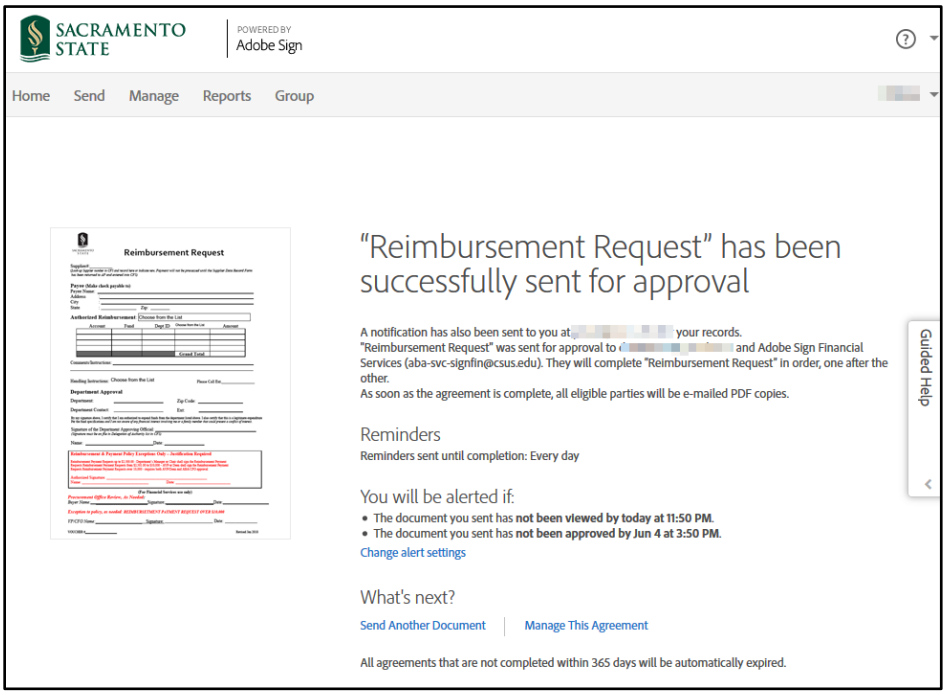

Figure 6. Confirmation message screenshot

7. Once the invoice is approved, you will receive an email confirmation. (see figure 7. Approval Confirmation screenshot) To view the approved document, click on the link provided in the email.

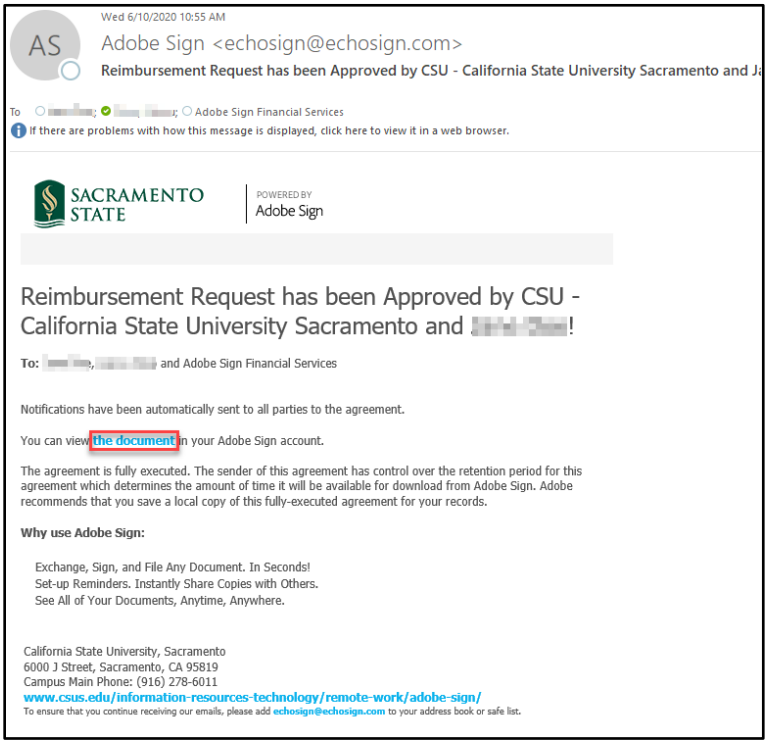

Figure 7. Approval Confirmation screenshot