San Francisco State University
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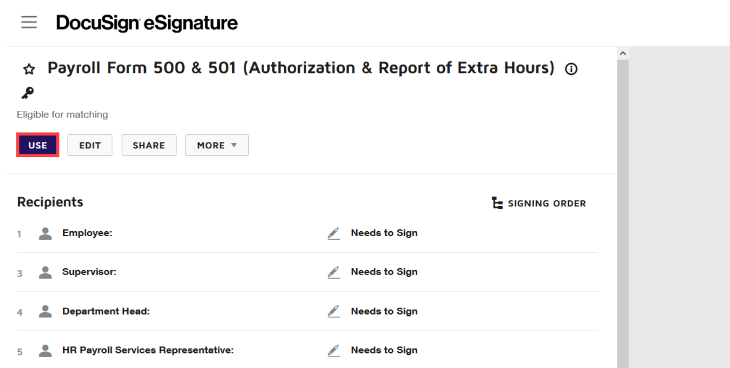
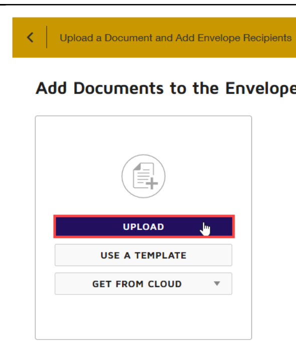
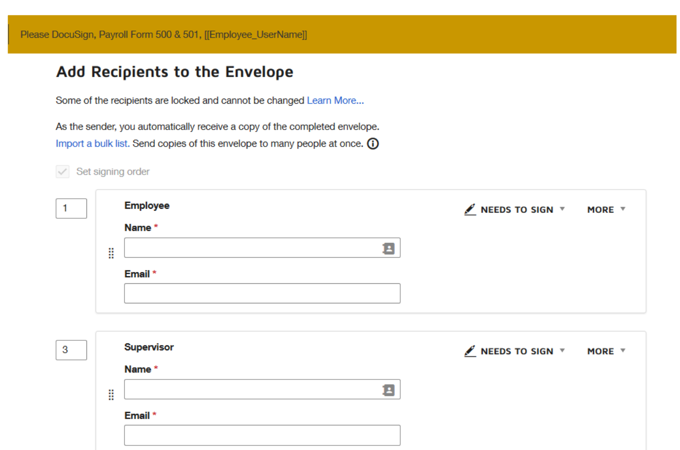
San Francisco, CA 94132

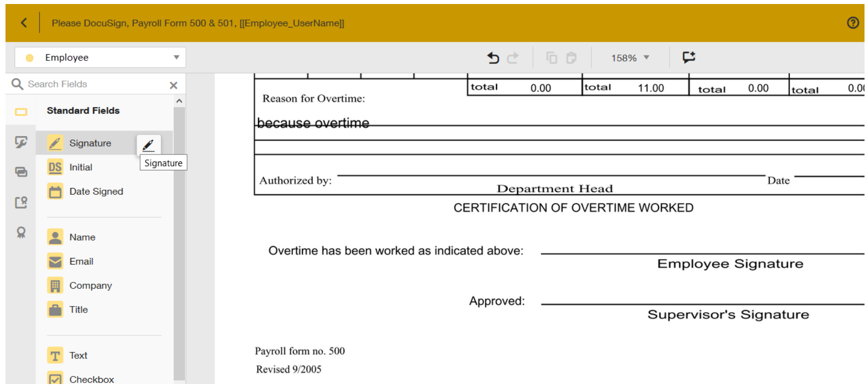
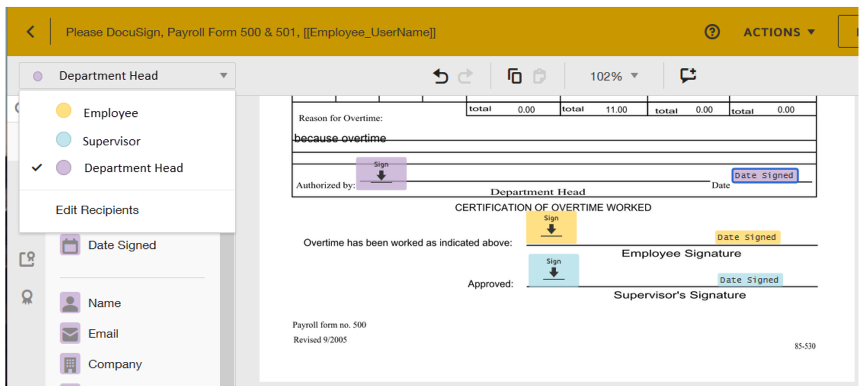
Business Process Guide: Form 500 & 501 in DocuSign

For questions regarding the Form 500 & 501, please contact the Designated Payroll Services Representative for your department. You can reference the following contact list https://hr.sfsu.edu/payroll-representatives for your designated representative.

For general questions regarding DocuSign, please visit DocuSign @ San Francisco State or contact Quality Assurance at qateam@sfsu.edu.

Procedures

Steps	Screenshots
1. First, fill out the Form 500 & 501 in Adobe PDF. 2. Click on the link and select **USE** to begin entering routing information.	
3. Click on **UPLOAD** to upload the completed Form 500 & 501.	
4. Under Add Recipients to the Envelope, enter recipient contact information. You can delete a recipient role by hovering over the right and clicking on the X. Click on **NEXT** on the bottom right of the page.	

Steps	Screenshots
5. Click on the Signature Standard Field and drag it onto the Employee Signature line. Do the same for Date Signed.	
6. Click on the dropdown menu of names in the upper left, select the Supervisor's name and drag a Signature Field onto the Supervisor Signature line. Do the same for the Date Signed. Repeat for the Department Head.	
7. Click **SEND** at the bottom left corner of the page to initiate the transaction.	
8. When the transaction is completed, you will receive a DocuSign email notification with the signed document and transaction summary attached. You may also access the signed document in your DocuSign account by selecting **VIEW COMPLETED DOCUMENT**.