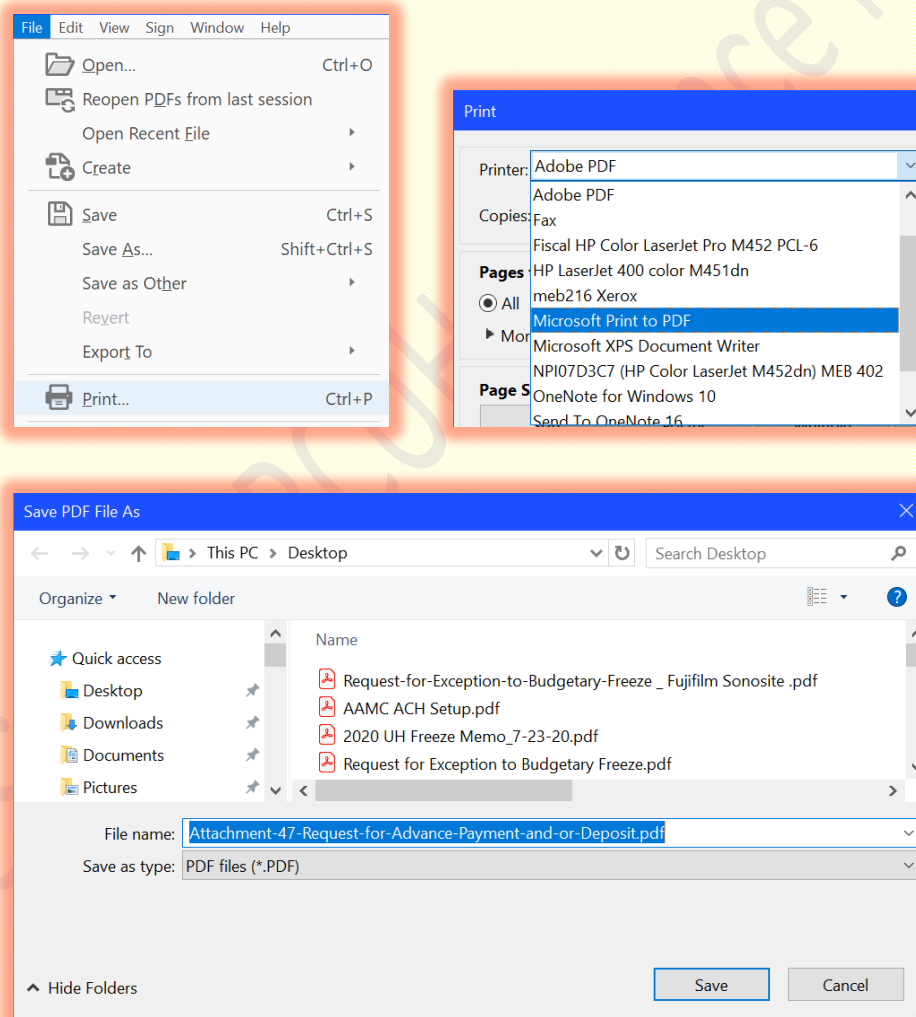


Purpose

The following procedures provide an alternative option for obtaining signature approvals on the RCUH Advance Payment Form. Currently, this form typically involves physical routing for wet signatures. As obtaining wet signatures can be time consuming or may not be feasible, this electronic signature option may prove useful and more efficient for your operations.

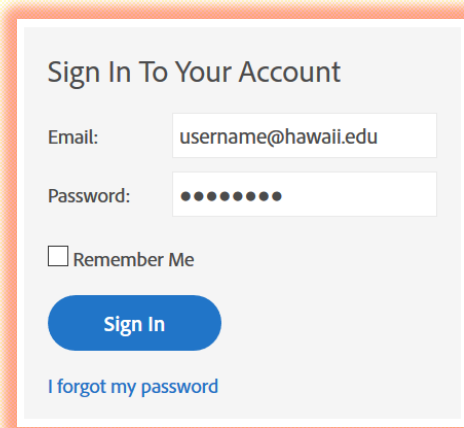
Instructions

1. Prepare RCUH Advance Payment Form following standard procedures.
 - a. Form is available at blog.hawaii.edu/ofaa/forms.
2. Prior to uploading the form for electronic signatures, we need to “flatten” the document so the form-fillable fields will not appear and distract signers when taking action. Click File, Print, and select Adobe PDF or Microsoft Print to PDF. Browse for a location to save the file, and click Save. Adobe Acrobat will produce a “flattened” version of the form, i.e. no form fillable fields, which can now be uploaded for electronic signatures.



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3. Open your desired web browser and login to RCUH eSign.
 - a. For access, please complete Fiscal Systems Access form available at blog.hawaii.edu/ofaa/forms



Sign In To Your Account

Email:

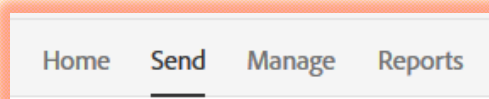
Password:

☐ Remember Me

[Sign In](#)

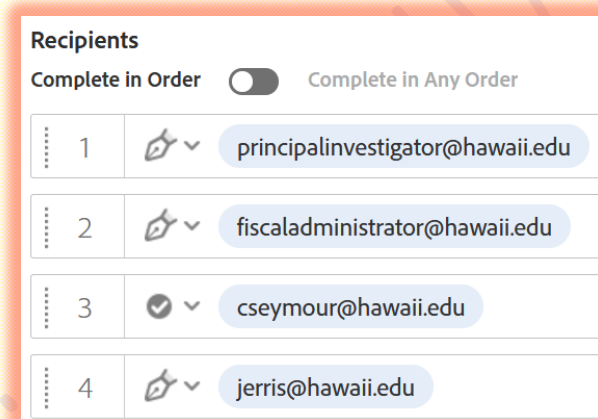
[I forgot my password](#)

4. Click "Send."



Home **Send** Manage Reports

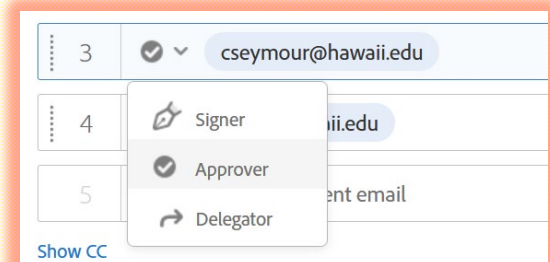
5. Enter the following email addresses in order: 1) Principal Investigator (PI), 2) Fiscal Administrator, 3) Chief Administrative Officer (cseymour@hawaii.edu), and 4) Dean (jerris@hawii.edu). For Chief Administrative Officer, change the role from Signer to Approver (i.e. initials only).



Recipients

Complete in Order ☐ **Complete in Any Order** ☒

1		<input type="text" value="principalinvestigator@hawaii.edu"/>
2		<input type="text" value="fiscaladministrator@hawaii.edu"/>
3		<input type="text" value="cseymour@hawaii.edu"/>
4		<input type="text" value="jerris@hawaii.edu"/>



3

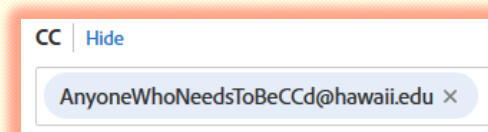
4

5

Show CC

- Signer
- Approver**
- Delegator

6. In the CC tab, enter the email address of any person(s) who may want to be notified of this form. Upon completion of all signatures, these cc recipients will receive an email with the fully-executed copy.

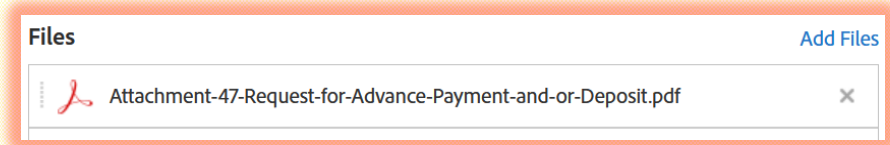


CC [Hide](#)

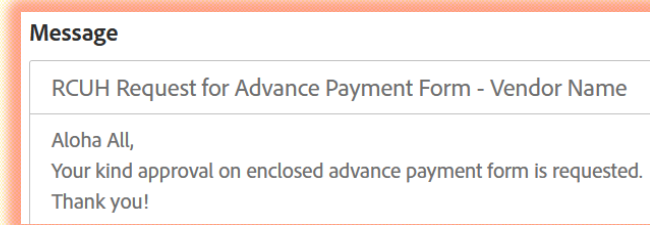
x

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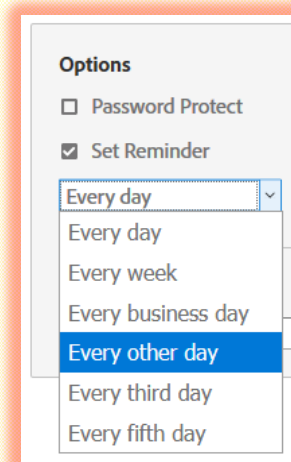
- Click “Add File” to browse and upload the form. Alternatively, you may drag the form from your desktop/shared drive into the upload box. Related documents may also be uploaded as needed.



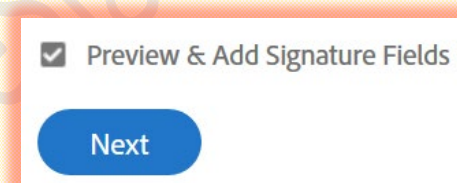
- Enter a message as needed. The message can serve as a “post-it” to notify signature parties of any special considerations.



- Click “Set Reminder.” Using the drop-down menu, select a frequency. Automatic reminders will be sent on the selected day at the same time as when the file is initially sent for signature. In the example below, if the file is sent for signature on Tuesday, 9/29/2020, 3:50 p.m., the next signer will be prompted again on Thursday, 10/1/2020, 3:50 p.m., if s/he has not yet taken action.

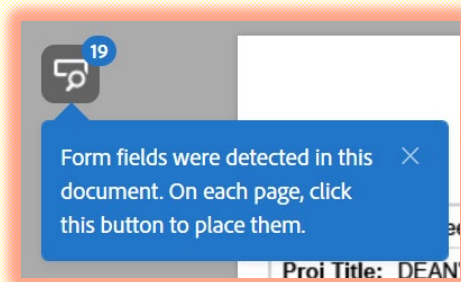


- Review all information inputted before clicking “Next” button. Important Note: Although you are able to return to this screen, edits will be limited.

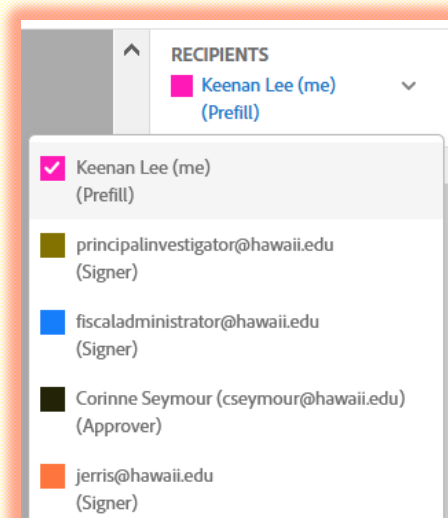


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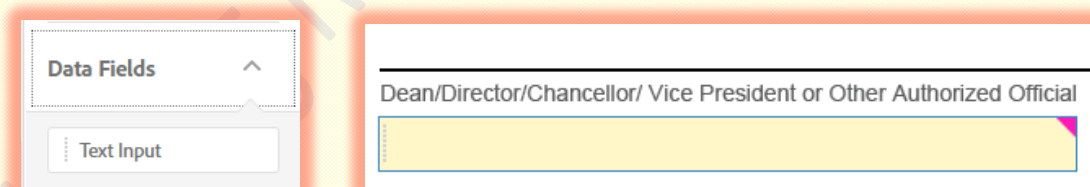
11. Adobe Sign will upload the document and sense fields that you may wish to have form-fill. As you have already completed the form, ignore this message. Do not click on this button.



12. Under the Recipients tab, note the different colors for each signer. Select yourself (me) (Prefill) to start. Check mark should appear next to your name.



13. Under the Data Info fields tab, click and drag "Text Input" and position underneath the Dean's signature line. Reshape the box as needed.



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14. As a courtesy, we will input the Dean's name and several of his degrees. Double-click on the text box. Under Default Value, enter "Jerris Hedges, MD, MS, MMM." Click "Ok" when done.

The 'Custom Field 1' dialog box shows the following settings: Assigned To: Keenan Lee (me) (Prefill); Field Type: Text Input; Value Type: Entered Value; Required: unchecked; Read Only: unchecked; Mask field data: unchecked; Multi-line data entry: unchecked; Default Value: Jerris Hedges, MD, MS, MMM; Tooltip: (empty); Validation: None; Appearance: (dropdown); Tools: (dropdown). At the bottom are buttons for 'Delete Field', 'Cancel', and 'OK'.

The text input field is labeled 'Dean/Director/Chancellor/ Vice President or Other Authorized Official' and contains the text 'Jerris Hedges, MD, MS, MMM'.

15. Go back to the Recipients tab, and select Principal Investigator. Check mark should appear next to Principal Investigator's email address. While checked, all boxes drawn will be identified with the Principal Investigator's color, denoting association with the Principal Investigator to complete.

The 'RECIPIENTS' list shows the following entries: Keenan Lee (me) (Prefill) with a pink square; principalinvestigator@hawaii.edu (Signer) with a green square and a checkmark; fiscaladministrator@hawaii.edu (Signer) with a blue square; Corinne Seymour (cseymour@hawaii.edu) (Approver) with a black square; and jerris@hawaii.edu (Signer) with an orange square.

16. Under the Signature Fields tab, click and drag "Signature" to the Principal Investigator's signature line on the form. Reshape the box as needed. Note the tab color in the upper right corner of the box is indicative of association to the Principal Investigator.

The 'Signature Fields' tab shows a single field labeled 'Signature' with a green tab in the upper right corner.

The 'Certification' section shows 'Approved By:' followed by a signature line labeled 'Signature' with a green tab in the upper right corner. Below the signature line is the text 'Signature of Principal Investigator'.

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17. Under the Signer Info Fields tab, click and drag “Date” to the Principal Investigator’s date box. Reshape the box as needed.

The image shows a software interface for form creation. On the left, a panel titled 'Signer Info Fields' contains a list of fields: Title, Company, Name, Email, and Date. On the right, a form section titled 'Certification' is visible. It includes a 'Signature' field for the 'Approved By' and a 'Date' field. The 'Date' field is highlighted, indicating it is being dragged or edited.

18. Double-click the Date field, and click “Edit.” Select date format and change appearance as needed. Click “Ok” when done.

The image shows a configuration menu for a 'Date 1' field. The 'Assigned To' is 'principalinvestigator@hawa...'. The 'Field Type' is 'Date'. The 'Date Format' dropdown is open, showing various date formats, with 'mm/dd/yyyy (12/12/2020)' selected. The 'Appearance' section shows font settings (Source Sa..., 10 pt) and alignment options. The 'OK' button is visible at the bottom right.

19. Repeat the four preceding steps for the Fiscal Administrator’s signature and date boxes. Note the different tab color denoting association with the Fiscal Administrator to complete.

The image shows the completed form. It has two signature and date boxes. The first box is for the Principal Investigator, with a grey background and the text 'Signature' and 'Date'. The second box is for the Fiscal Administrator, with a yellow background and the text 'Signature' and 'Date'. The 'Date' field in the second box is highlighted.

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20. Go back to the Recipients tab, and select Chief Administrative Officer.

RECIPIENTS

- Corinne Seymour (cseymour@hawaii.edu) (Approver)
- Keenan Lee (me) (Prefill)
- principalinvestigator@hawaii.edu (Signer)
- fiscaladministrator@hawaii.edu (Signer)
- Corinne Seymour (cseymour@hawaii.edu) (Approver)
- jerris@hawaii.edu (Signer)

21. Since the Chief Administrative Officer is designated as an Approver, we'll be drawing an Initials box only to signify their approval. This will let the Dean know the Chief Administrative Officer has vetted and approved the form. Under the Signature Fields tab, click and drag "Initials" to the left of the Dean's signature line. Reshape the box as needed.

RECIPIENTS

- Corinne Seymour (cseymour@hawaii.edu) (Approver)

Signature Fields

Signature

Initials

On behalf of my respective UH school or department, amounts:

Dean/Director/Chancellor/ Vice President or Other Authorized Official

Jerris Hedges, MD, MS, MMM

22. Repeat Steps #15 - #18 for the Dean's signature and date boxes. Note the different tab color denoting association with the Dean to complete.

Certification:

Approved By: Signature Date: Date

Reviewed By: Signature Date: Date

On behalf of my respective UH school or department, I hereby agree to reimburse the RCUH for all advance/deposit amounts:

Initials Signature Date: Date

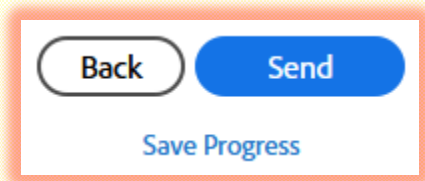
Dean/Director/Chancellor/ Vice President or Other Authorized Official

Jerris Hedges, MD, MS, MMM

23. Review all boxes drawn to ensure they are associated with the appropriate signer/approver.

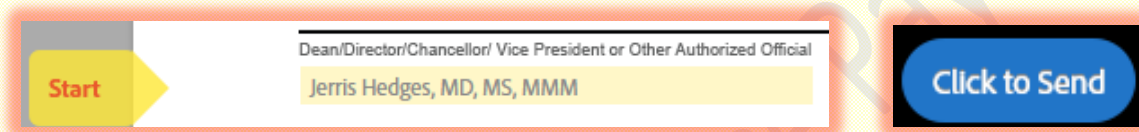
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24. Click "Send" button to route for electronic signatures.



25. Since the pre-fill text input box in Steps #13 - #14 is associated with you, Adobe Sign will prompt you to complete the field. This is one last opportunity for you to edit the text as needed.

If edits are not needed, click on the text box, and then click "Click to Send" to advance the form to the first signature party. You will receive a courtesy email confirmation. Recipients will be notified via email when it's their turn to sign/approve.



26. Signers/Approvers have the option to decline action if the form is incomplete or requires edits. In these situations, edit the form as needed, and repeat these steps to route the revised form for electronic signatures/initials.

27. Once all electronic signatures/initials have been obtained, you will receive an email with the fully-executed document and audit log.

28. Attach completed form to appropriate purchase/payment document for processing.

Conclusion

We hope you find this alternative electronic signature option for RCUH Advance Payment Form quicker and more efficient for your operations. Thank you for considering and using this option. Please [contact your Fiscal Administrator](#) if you have any questions or concerns.