

ADOBE SIGN for P-Card Application & Exception Forms

Rev 8/26/2021

If you have already used Adobe Sign, you can skip this document and respond to the email you receive, otherwise the info below will be necessary.

In its move to a paperless workflow, Krannert will be relying on Adobe Sign to manage signatures on secure documents. Adobe Sign allows PDFs to be routed for secure editing and signatures. While you will need an Adobe account to sign documents, as a UIUC employee/student you already have an account tied to your @illinois.edu email address waiting for you. Logging in to that account is described below.

MENU

Using Adobe Sign (below)

[Troubleshooting Adobe Sign](#)

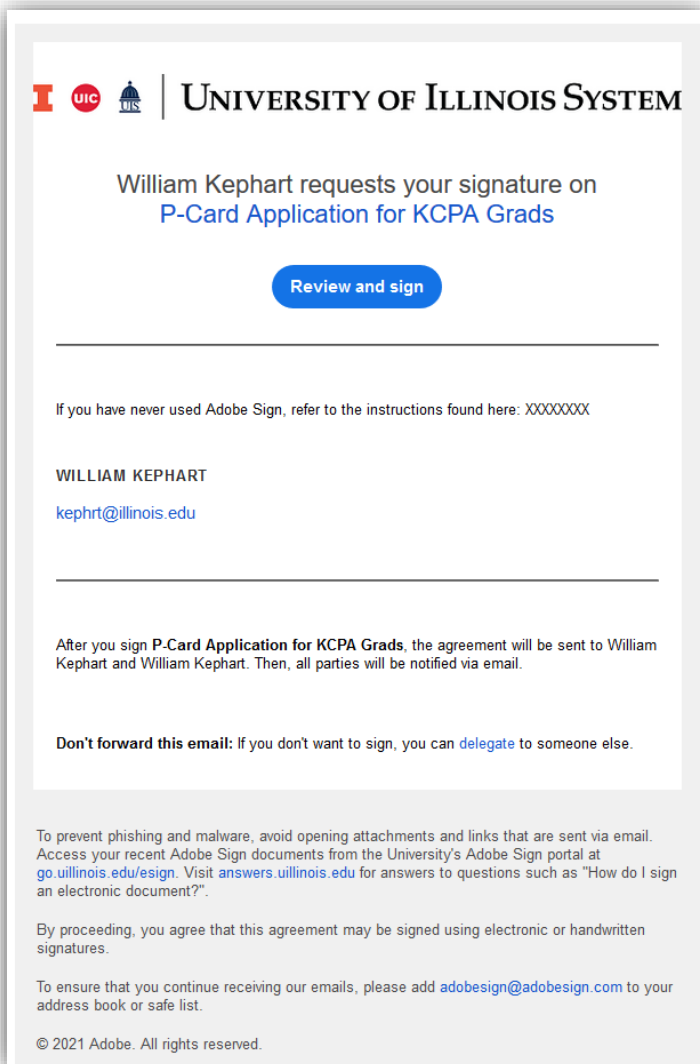
USING ADOBE SIGN

NOTE: The screenshots below may be of either the P-Card Application or the P-Card Exception Request, but the form doesn't matter; the concept is the same for both.

You will receive an email in the following format:

- Sender: "William Kephart"
- Subject line: "Signature requested on P-Card Application for KCPA Grads" or "...P-Card Exception Request for KCPA Grads"

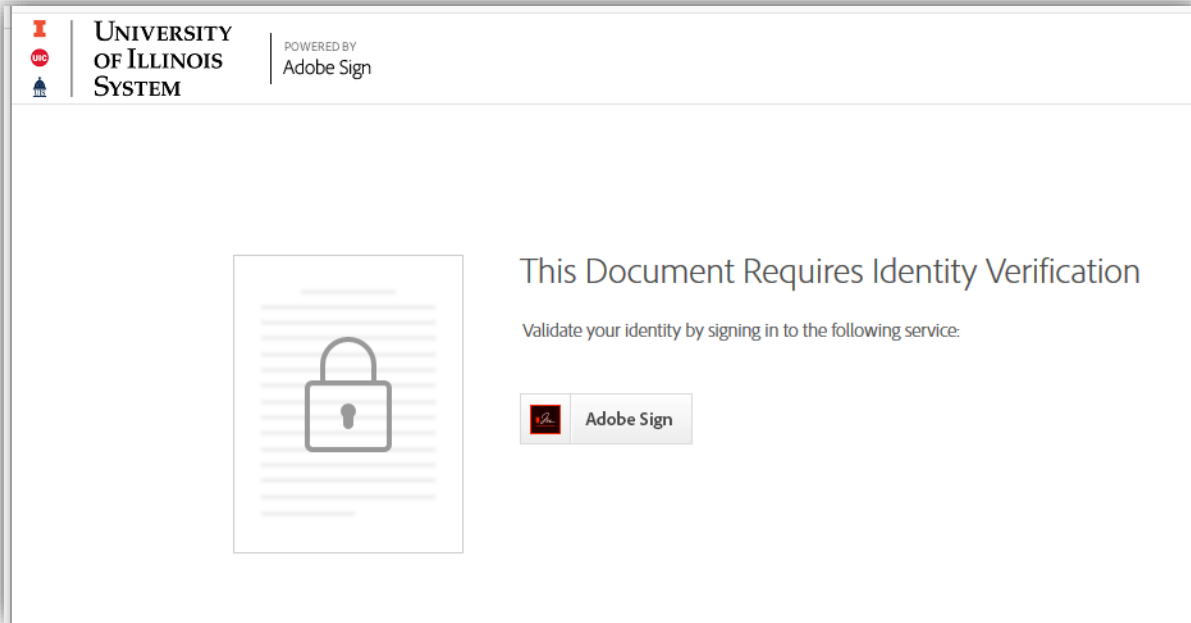
CLICK the "Review and sign" button in that email.



You should be taken to the screen below.

Click the Adobe Sign button.

NOTE: Here is where you may have issues. A pop-up window should appear. Depending on your security settings - pop-up blockers in particular - the page may simply hang. Either temporarily shut off your pop-up blocker, change browser settings, or try another browser with less restrictions. See the [Troubleshooting](#) section for details.

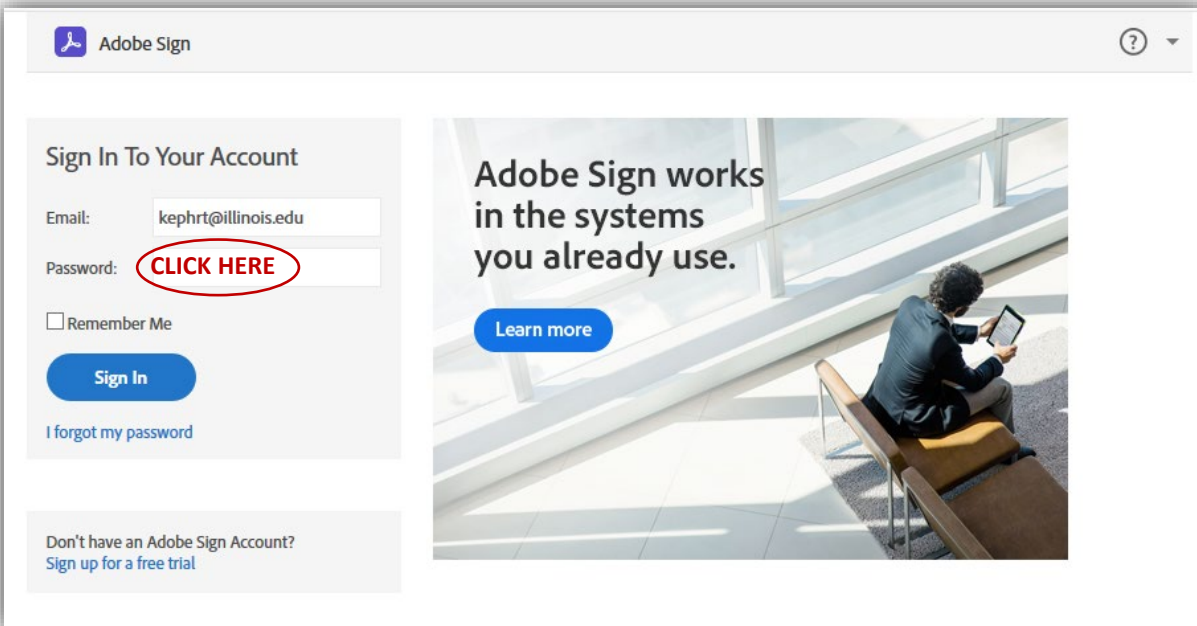


If you have no issues, you should see some version of the Adobe Sign login below.

Enter your @illinois.edu email address.

You will NOT need a password!

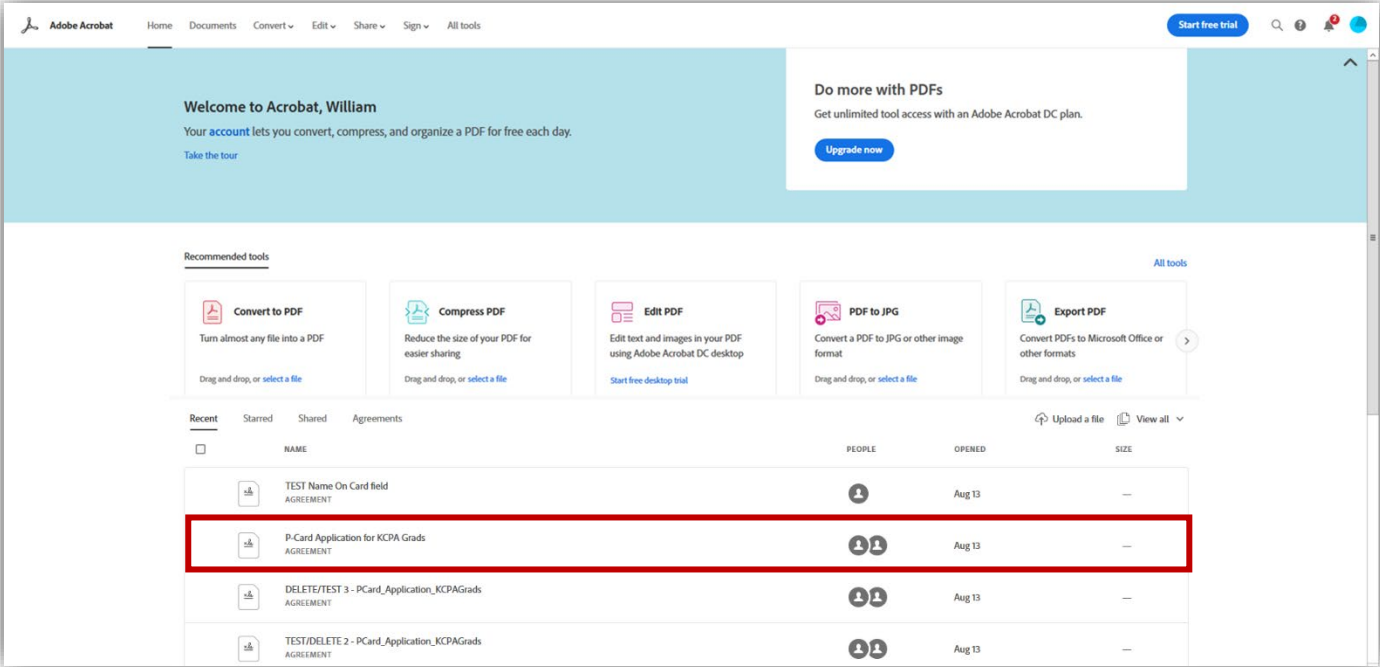
Simply CLICK in the password field and wait a second; you should automatically be forwarded to the university's Enterprise Login page (no screenshots).



Once you log in through Enterprise, it will take you directly to the Adobe Sign page.

NOTE: Though not likely, if you have never accessed your @illinois.edu Adobe account, this is another point where you might have issues, particularly if you have a separate/older Adobe account. If so, see the [Troubleshooting](#) section.

At the bottom of the Adobe Sign Home page is a list of documents to be signed. Double-click on either the P-Card Application or P-Card Exemption (whichever you want to start with). NOTE: One or both of these should be at the top of the list.



The document will open. Look for the yellow “Start” marker.

The screenshot shows a 'P-Card Exception Request' form from the University of Illinois System. The form is titled 'P-Card Exception Request' and includes a note: 'Note: Exceptions may only be considered for review prior to the purchase/transaction being transacted. Post purchase exception requests will not be processed.' Below the note, there are instructions: 'The original form must be completed and forwarded to the Department Card Manager (DCM) for processing and retention. The DCM will scan and email to ucsp@uiouis.edu the completed form to UPAAT Card Services for processing.' and 'For questions please call UPAAT Customer Services at 217-353-6583 or 888-872-9953.' The form contains several fields: 'Date' (08/01/2020), 'Org Code' (80000), 'Department Name' (Krescent Center for the Performing Arts), 'Department Contact' (William I. Kephart), 'Campus Address' (500 S. Goodwin Ave.), 'City' (Urbana), 'State' (IL), 'Zip Code' (61801), 'Mail Code' (MC-072), 'Phone Number' (217-244-3943), 'Fax Number' (217-244-5801), and 'Email' (kephart@uiouis.edu). There is a large text area for 'Provide a description of the P-Card exception that is being requested. Include as much information as possible including the type of purchase, the amount and the reason that the exception is needed. Attach an additional sheet for comments and backup documentation if needed. (Field length is limited to the visible area - approximately 1500 characters.)'. At the bottom, there is an 'Approvals' section with a note: 'Approvals: (Approval of the Department Head is required for all exception requests.)'. A yellow 'Start' marker is visible at the bottom left of the form.

The marker will point to the first field you need to complete. After you enter data in a field, hit the TAB button and the “Start” marker will change to “Next” and jump to the next field to be edited/filled. These arrows will lead you through all the fields to be filled. REQUIRED fields have a red asterisk (*) in the corner. Those fields MUST have data in them, or you will not be able to submit the document. The final field is always the SIGNATURE field.

When you get to the SIGNATURE field, click on it, and a window will pop up.
Choose the “Type” signature option – don’t mess with the others.
Type your name, and it will display in a faux signature font.
Click APPLY.

The screenshot shows the Adobe Sign interface for the University of Illinois System. A modal window is open for selecting a signature. The 'Type' option is circled in red. A blue tooltip says 'Draw or take a picture of your signature using your mobile device.' The signature 'William Kephart' is displayed in a cursive font. Below the signature, there are 'Close' and 'Apply' buttons. The background form shows fields for Cardholder, Department Card Manager, and Department Head, each with a signature line and a 'Click here to sign' button. The Cardholder field is highlighted with a yellow background.

Your “signature” will appear in the Signature field as below, and the date of signing will auto-fill.
At the bottom of the screen, you should now see a “Click to Sign” button.
If you omitted any required fields, that button will not appear until those fields are filled.

The screenshot shows the Adobe Sign interface for the University of Illinois System. The 'Click to Sign' button is circled in red at the bottom of the screen. The background form shows the 'PCardException_FY21_TEST' document. The 'Cardholder' field is highlighted with a yellow background. The 'Department Card Manager' and 'Department Head' fields are also highlighted with yellow backgrounds. The 'OBFS Approvals' section is highlighted with a yellow background. The 'Click to Sign' button is located at the bottom right of the screen.

Click on the “Click to Sign” button to officially submit your signed document.
(If any other submission confirmation buttons appear after that, just click to confirm.)
After submission you should see a confirmation screen, at which point you can logout of Adobe Sign.
You’re DONE!

If you experience issues, they will likely be one of these:

1. Your browser is blocking the pop-up windows required to sign into Adobe.
2. You have an “old” Adobe account with a personal, unauthenticated password already assigned to your @illinois.edu address.

Solutions to both of these are addressed toward the bottom of this 1-page troubleshooting guide:

<https://answers.uillinois.edu/systemoffices/99990>

A personal note: Adobe Sign is designed to work on most up-to-date browsers, including Firefox, but I was unable to get it work on my personal Firefox browser, likely due to several strict security settings. I shifted to a rarely used copy of Chrome and had no issues. In all cases, regardless of other security settings, pop-up blockers will prevent you from logging in.

As I need to resolve issues for you and future users, please let me know if you encounter a problem. If the troubleshooting guide doesn't help, email Bill Kephart (kephrt@uillinois.edu), or better, call, so we don't have multiple Q&A emails. I'm typically available from 9a-4:30p, M-F: 217-300-3943