

Adobe Sign Workflow Vendor Data Record Form (VDR)

When working with a vendor who needs a VDR, the campus representative needs to inquire whether the vendor's organization has an identifying FEIN number or will be using a social security number identification (common for independent contractors, student payments, etc.).

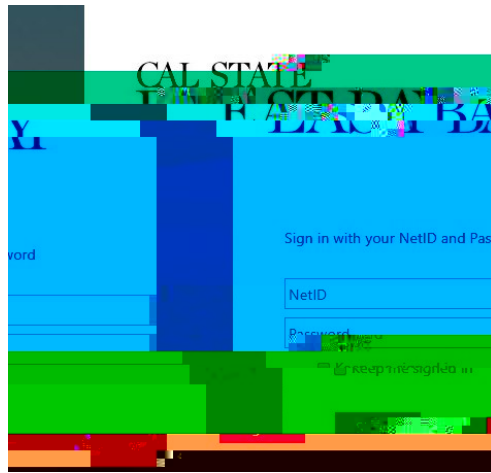
If a FEIN number will be reported, the campus representative may send the VDR form (Adobe Version) . Please proceed to step #1 for detailed instructions.

If Level 1 data (e.g., social security number) will be provided, the campus department will need to email DFFRXQWV_SD\DEOH#FVmakeSuchRequest. The only information that the campus representati ve will include in their request is th e vendor's email address.

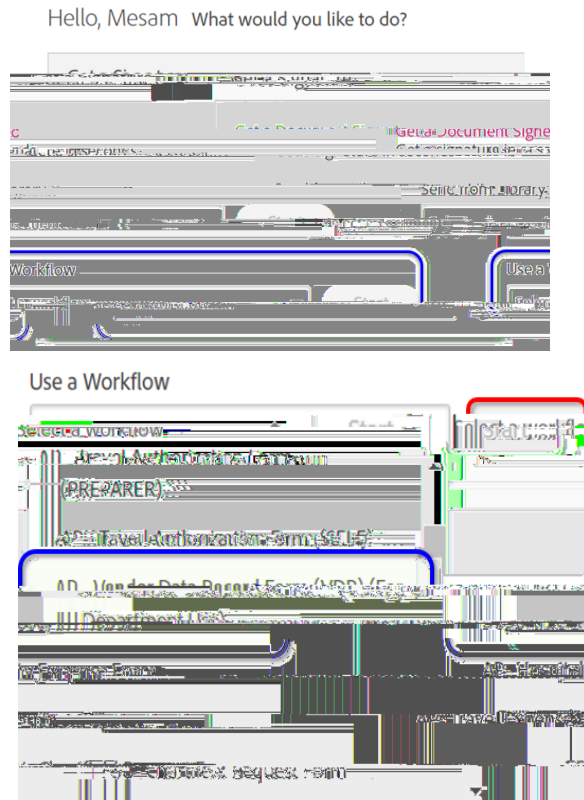
Accounts Payable will then send a secure VDR request to the vendor to complete. And, the campus representative will be copied on the communication. Please note that the subsequent instructions below do not apply to a vendor who is providing level 1 data.

1. Log into Adobe Sign: <https://csueastbay.na2.documents.adobe.com/account/home> ->

3. Authenticate with your NetID and password

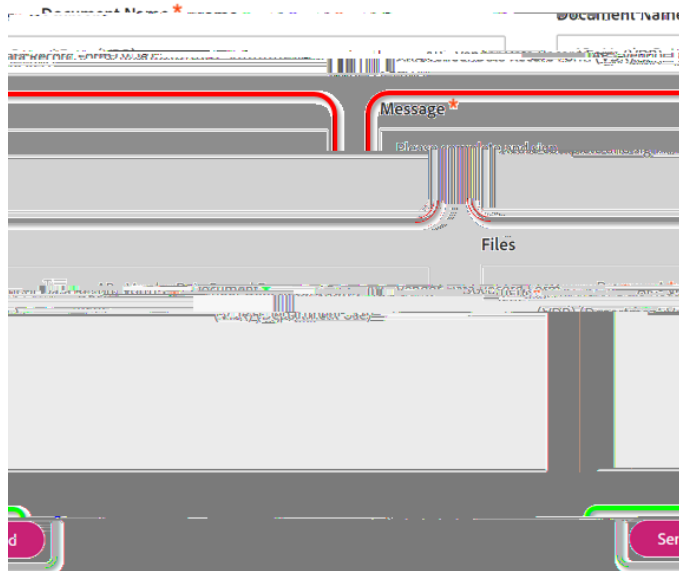
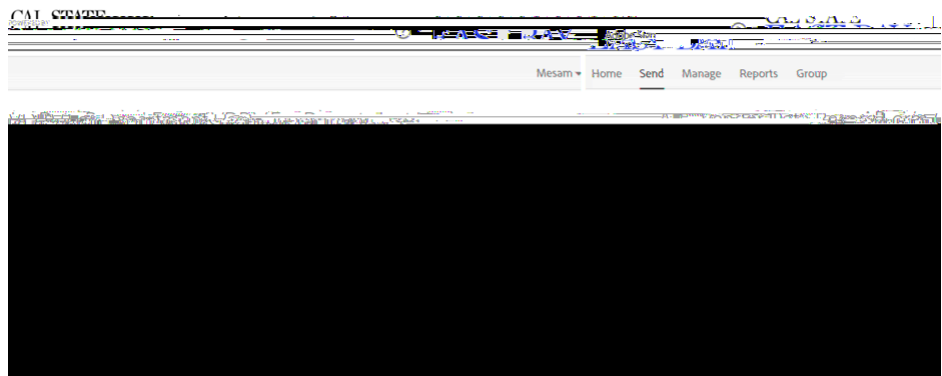


4. Go to the Use a Workflow section and scroll down to find the form labeled “**AP-Vendor Data Record Form (VDR) (For Department Use)**” -> then, click Start.



5. Routing the form: (Either managers or employees can initiate)

- a. In the Vendor field, enter the email address of the vendor who is completing the form.
- b. In the cc field, by entering email address in this field, they will receive the completed signed form.
- c. In the Message field, you can provide any additional information
- d. _____ the form will open for you/sent to requestor to complete and sign before sending it to the approver.
- e. Inside the form, Click Click to Sign , after completing and signing the form.



6. Once it is approved, all parties in the agreement will receive a final signed copy of the approved form.

Inside the form :

For parts I, II, IV, V, the vendor needs to fill out the form completely. For questions, the vendor may send their inquiries to general.accounting@csueastbay.edu.

For part III, the social security number is intentionally not available.

As a reminder: