### Setting up the AP 109

1) New forms have been uploaded to Academic Personnel’s forms page under “Evaluations”. There is now a page break just before the signatures causing signatures 1-25 to land on a separate page and 26-35 to land on yet another page.

Note: The maximum number of recipients Adobe Sign allows at once is 25, so if you ever have a DPRC that has more than 25 members, you will need to route to members 1-25 and 26-## separately.
2) In order for the form field template to work, the DPRC will need to use the new versions of the AP 109 forms.

3) Enter the DPRC member names into the form fields on the Word Document in the numbered ordered (top-left to bottom-left, and top-right to bottom-right).

In the example above, Cassie Stevenson is participant 1 (chair), Lindsay Howell is participant 2, Melissa Bodin is participant 3 and Sharon Arnold is participant 4.
<table>
<thead>
<tr>
<th>Instruction</th>
<th>Screenshot/Details</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Route the Complete AP 109 using Adobe Sign “Field Templates”</strong></td>
<td></td>
</tr>
<tr>
<td>1) Once the DPRC returns the evaluation to you, check that the formatting of the document hasn’t been messed up (e.g., the signatures are still breaking onto separate pages, second to last page is 1-25 and last page is 26-35).</td>
<td><img src="Image1" alt="Cal Poly My Portal" /></td>
</tr>
<tr>
<td>2) Login to your Cal Poly Portal, select “Adobe Sign” under “My Apps.”</td>
<td><img src="Image2" alt="Adobe Sign" /></td>
</tr>
<tr>
<td>3) Once Adobe Sign opens, select “Send” from the top-menu bar.</td>
<td><img src="Image3" alt="Welcome, Cassie" /></td>
</tr>
<tr>
<td>4) On the next page, enter the DPRC member names in the same numbered order, which they appear on the AP 109 form. See example in next column.</td>
<td><img src="Image4" alt="Example AP 109" /></td>
</tr>
<tr>
<td>5) After you add the DPRC members as participants in the same order that they appear on the AP 109, you may toggle the switch to</td>
<td>“Send” Adobe Sign Page:</td>
</tr>
</tbody>
</table>
“Complete in Any Order”. This will allow all the DPRC members to sign simultaneously.

**Note:** When you change to “Complete in Any Order” the numbers on the left side go away.

Select “Complete in Any Order”:

- Add the completed AP 109 form under “Files” by either dragging and dropping or selecting the “Add Files” link.
- Adjust your “Completion Deadline” and “Message.”
- Then select “Next” when you are ready.
9) On the next page, scroll down to where the signatures start. Then select “Field Templates” in the upper-left corner.

10) Select the drop-down message and choose the appropriate shared template.
- If you are gathering signatures 1-25, select “AP109 Committee Signature Page 1-25 (shared by Cassie Stevenson)”.
- If you are gathering signatures 26-35, select “AP109 Committee Signature Page 26-35 (shared by Cassie Stevenson)”.

11) Then select the page number the signatures appear on, and choose “Apply.”

12) Now the signature field and date field for each DPRC member should automatically populate on their respective lines. Verify that each recipient’s fields are appearing above their name by selecting a name under “Recipients” and confirming that the signature fields that are highlighted yellow appear above that person’s name on the form.

When Cassie Stevenson is selected the highlighted cells are correct:

When Lindsay Howell is selected the highlighted cells are correct:
13) When you are ready to route for signature select “Send.”
### Monitor Signatures from “Manage” Tab

1) If you need to monitor who has signed, you can see that by going to the “Manage” tab and looking at the number of total signers that have signed so far.

2) If you select “Open,” next to the AP 109 form that you routed and then you can see which recipients have signed and/or viewed the form.

### Note:
- Lindsay Howell shows as “Signer viewed,” which means she has opened the agreement but hasn’t signed yet.
- Melissa Bodin shows as “Signed” with a green checkmark meaning she has signed.
- Cassie Stevenson and Sharon Arnold show as “Signature requested,” meaning they have not viewed or signed but they were sent a notice.