

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.

By signing below, I agree with the above evaluation and acknowledge my evaluation resulted from thorough review of the Personnel Action File (PAF), including student evaluations, and the Working Personnel Action File (WPAF). My signature also certifies that I did not copy, share or reproduce the documents and materials contained within the candidate's PAF or WPAF.

1	█, Chair	Date	14	█	Date
2	█	Date	15	█	Date
3	█	Date	16	█	Date
4	█	Date	17	█	Date
5	█	Date	18	█	Date
6	█	Date	19	█	Date
7	█	Date	20	█	Date
8	█	Date	21	█	Date
9	█	Date	22	█	Date
10	█	Date	23	█	Date
11	█	Date	24	█	Date
12	█	Date	25	█	Date
13	█	Date			

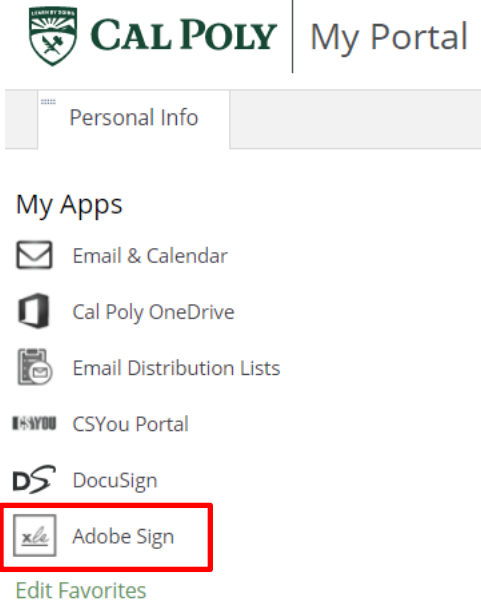
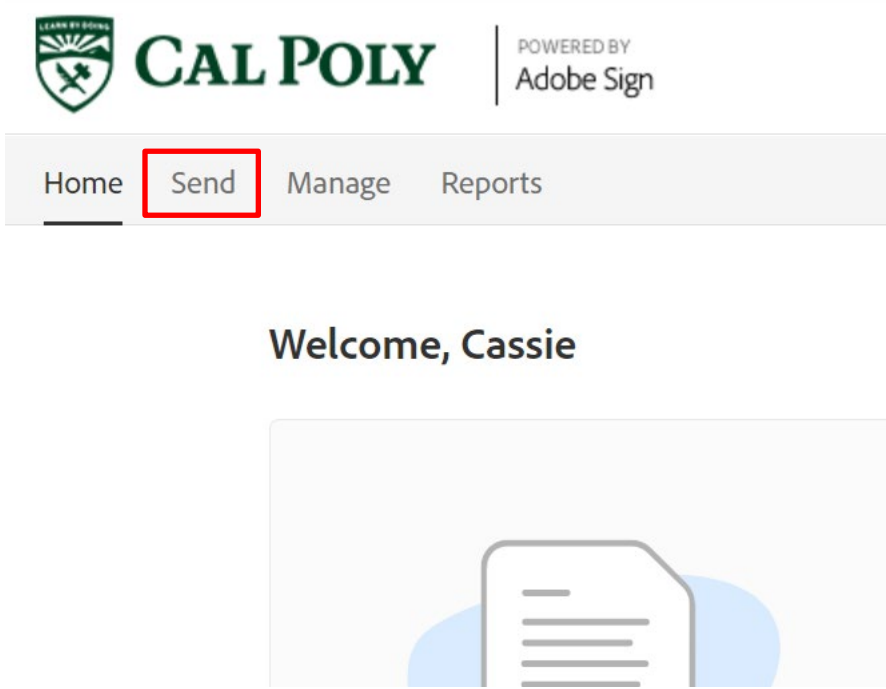
26	█	Date	31	█	Date
27	█	Date	32	█	Date
28	█	Date	33	█	Date
29	█	Date	34	█	Date
30	█	Date	35	█	Date

- 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).

By signing below, I agree with the above evaluation and acknowledge my evaluation resulted from thorough review of the Personnel Action File (PAF), including student evaluations, and the Working Personnel Action File (WPAF). My signature also certifies that I did not copy, share or reproduce the documents and materials contained within the candidate's PAF or WPAF.

1	Cassie Stevenson, Chair	Date	14		Date
2	Lindsay Howell	Date	15		Date
3	Melissa Bodin	Date	16		Date
4	Sharon Arnold	Date	17		Date
5		Date	18		Date
6		Date	19		Date

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.

Instruction	Screenshot/Details
Route the Complete AP 109 using Adobe Sign “Field Templates”	
<p>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).</p> <p>2) Login to your Cal Poly Portal, select “Adobe Sign” under “My Apps.”</p>	 <p>The screenshot shows the Cal Poly My Portal interface. At the top, there is a header with the Cal Poly logo and 'My Portal'. Below this is a 'Personal Info' section. The main area is titled 'My Apps' and lists several applications: Email & Calendar, Cal Poly OneDrive, Email Distribution Lists, CSYou Portal, DocuSign, and Adobe Sign. The Adobe Sign icon, which features a document with a signature line, is highlighted with a red rectangular box. Below the list is an 'Edit Favorites' link.</p>
<p>3) Once Adobe Sign opens, select “Send” from the top-menu bar.</p>	 <p>The screenshot shows the Adobe Sign interface. At the top, there is a header with the Cal Poly logo and 'POWERED BY Adobe Sign'. Below this is a navigation bar with four buttons: Home, Send, Manage, and Reports. The 'Send' button is highlighted with a red rectangular box. Below the navigation bar, the text 'Welcome, Cassie' is displayed. At the bottom, there is a large graphic of a document with a signature line.</p>
<p>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.</p> <p>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</p>	<p>Example AP 109: “Send” Adobe Sign Page:</p>

“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.

Recipients	
Complete in Order <input type="checkbox"/>	Complete in Any Order <input checked="" type="checkbox"/>
1 Cassie Stevenson, Chair	1 csteve03@calpoly.edu
2 Lindsay Howell	2 lmhowell@calpoly.edu
3 Melissa Bodin	3 mbodin@calpoly.edu
4 Sharon Arnold	4 sarnold@calpoly.edu
	5 Enter recipient email

Select “Complete in Any Order”:

Recipients	
Complete in Order <input type="checkbox"/>	Complete in Any Order <input checked="" type="checkbox"/>
csteve03@calpoly.edu	
lmhowell@calpoly.edu	
mbodin@calpoly.edu	
sarnold@calpoly.edu	
Enter recipient email	

6) Next add the completed AP 109 form under “Files” by either dragging and dropping or selecting the “Add Files” link.

7) Adjust your “Completion Deadline” and “Message.”

8) Then select “Next” when you are ready.

Message

API09 DPRC - Tester McTesterson

Please review and complete API09 DPRC - Tester McTesterson.

Files [Add Files](#)

API09 DPRC - Tester McTesterson.docx

Drag More Files Here

Preview & Add Signature Fields

[Next](#)

Options

Completion Deadline

90 days

to complete this agreement. Agreement expires after Jan 11, 2021.

Set Reminder

Recipients' Language

English: US

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)".

Home Send Manage Reports

Field Templates ▾

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By signing below, I agree with the above evaluation and acknowledge my evaluation resulted from thorough review of my Personnel Action File (PAF), including student evaluations, and the Working Personnel Action File (WPAF). My signature also certifies that I did not copy, share or reproduce the documents and materials contained within the candidate's PAF or WPAF.

1 Cassie Stevenson, Chair Date 14 Date

2 Lindsay Howell Date 15 Date

Field Template

Select...

Select...

Shared Templates

- 1AP 112-A - Approval Form for Leave of Absence with Pay (Refined) (shared by Cassie Stevenson)
- AP109 Committee Signature Page 1-25 (shared by Cassie Stevenson)
- AP109 Committee Signature Page 26-35 (shared by Cassie Stevenson)
- ASI_Remote_Work_Agreement (shared by Dora Mountain)
- Athletic Aid, ELLI, or COA (shared by Lacey Burk)

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

Field Templates ▾

Field Template

AP109 Committee Signature Page 1-25 ▾

Start on Page

4 / 5

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:

certifies that I did not copy, share or reproduce the documents and materials contained within the candidate's PAF or WPAF.

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RECIPIENTS

- Cassie Stevenson (cste... (Signer)

Signature Fields

Signature

Reset Fields

Save as template

Back Send

Signature

Date 14 Date

Date 15 Date

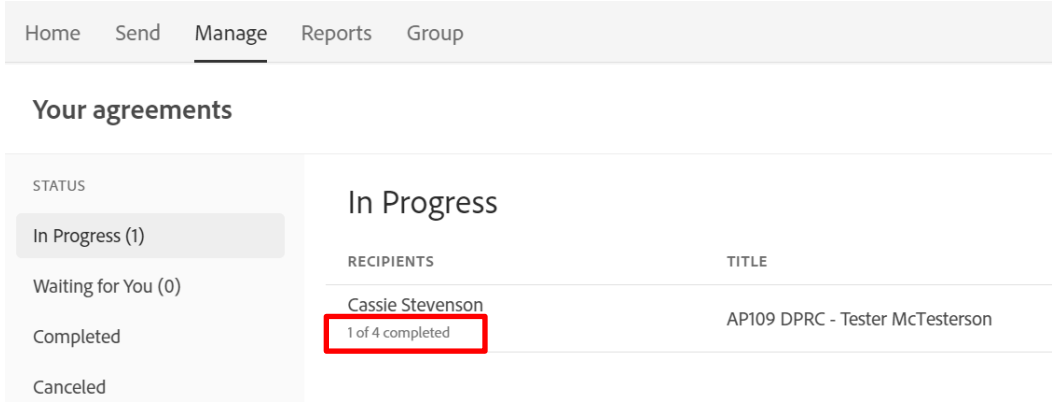
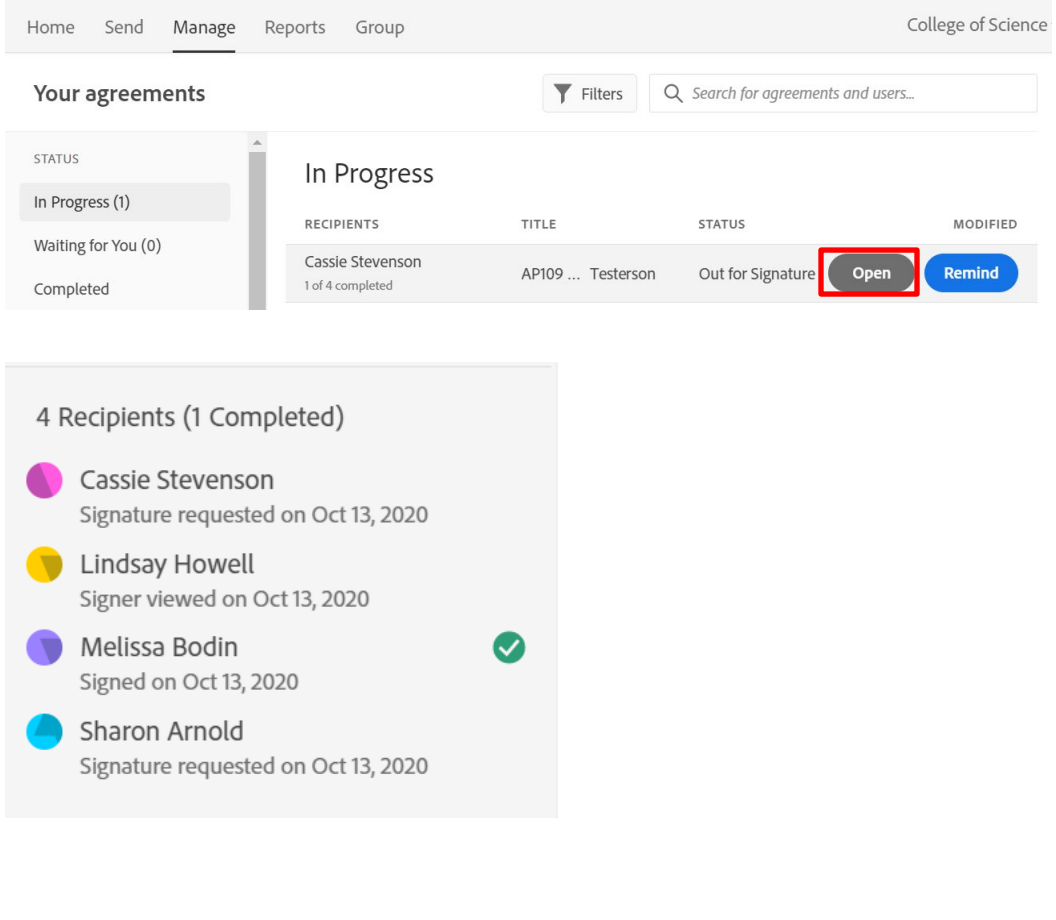
Date 16 Date

Date 17 Date

When Lindsay Howell is selected the highlighted cells are correct:

13) When you are ready to route for signature select "Send."

The screenshot displays a document routing interface. At the top, there is a header with 'Field Templates' and various icons. Below the header, a text block reads: 'certifies that I did not copy, share or reproduce the documents and materials contained within the candidate's WPAF.' The main area shows a list of four signers, each with a 'Signature' field and a 'Date' field. The second signer, Lindsay Howell, is highlighted in yellow. A red arrow points from the 'Send' button in the bottom right corner to the 'Date' field of the second signer. The bottom right corner features a 'Send' button highlighted with a red box, along with a 'Back' button and a 'Save Progress' link. The bottom of the interface shows a navigation bar with arrows and the text '4 / 5'.

Instruction	Screenshot/Details
Monitor Signatures from “Manage” Tab	
<p>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.</p>	 <p>The screenshot shows the 'Manage' tab interface. At the top, there are navigation links: Home, Send, Manage, Reports, and Group. Below this is the heading 'Your agreements'. On the left, there is a 'STATUS' filter menu with options: In Progress (1), Waiting for You (0), Completed, and Canceled. The 'In Progress' option is selected. On the right, there is a table with columns 'RECIPIENTS' and 'TITLE'. One row is visible: Cassie Stevenson (1 of 4 completed) and AP109 DPRC - Tester McTesterson. The text '1 of 4 completed' is highlighted with a red box.</p>
<p>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.</p> <p>Note:</p> <ul style="list-style-type: none"> 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. 	 <p>The screenshot shows the 'Manage' tab interface for 'College of Science'. At the top, there are navigation links: Home, Send, Manage, Reports, and Group. On the right, there is a search bar and a 'Filters' button. Below this is the heading 'Your agreements'. On the left, there is a 'STATUS' filter menu with options: In Progress (1), Waiting for You (0), Completed, and Canceled. The 'In Progress' option is selected. On the right, there is a table with columns 'RECIPIENTS', 'TITLE', 'STATUS', and 'MODIFIED'. One row is visible: Cassie Stevenson (1 of 4 completed), AP109 ... Testerson, Out for Signature, and buttons for 'Open' and 'Remind'. The 'Open' button is highlighted with a red box. Below the table, there is a section titled '4 Recipients (1 Completed)' with a list of recipients and their status: <ul style="list-style-type: none"> Cassie Stevenson: Signature requested on Oct 13, 2020 Lindsay Howell: Signer viewed on Oct 13, 2020 Melissa Bodin: Signed on Oct 13, 2020 (with a green checkmark) Sharon Arnold: Signature requested on Oct 13, 2020 </p>