# How to Use the Fillable Proposal Routing Form in PDF Format

Option 1: Using the Fill & Sign Function (Note: Linux users must use this option, as Linux does not support the desktop version of Adobe, which is needed for Option 2)

If you want to use the Fill & Sign Function you should follow the below steps to ensure that all parties will be able to easily digitally sign your form.

1. Download the Fillable Proposal Routing Form PDF from the OSP website and save it to your desktop/computer
2. Open the Fillable Proposal Routing Form PDF in Acrobat DC from your desktop/computer, not from the website
3. Fill in fields applicable to form initiator
4. Click the Fill & Sign tool in the right pane
5. Click "Request Signatures" in the Get others to sign box
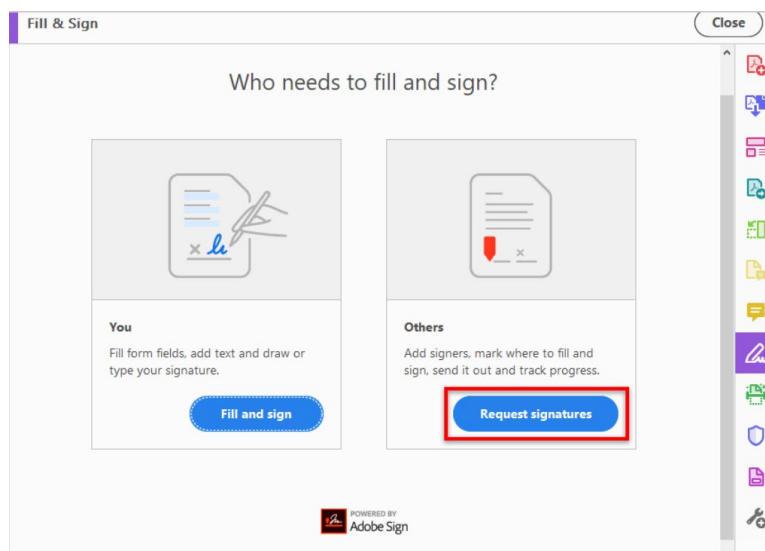
This is VERY IMPORTANT! If you select the "Fill, sign and send" option you will lock the form from further signatures and adding text/information to the form once you sign the form using this function.

6. Add signers in the "Signers" box, they need to be entered in the same order of signature as required on the form, **this includes your own signature as the form initiator**
7. Add a message in the "Subject & Message" box if desired
8. If signing in order is not required, and you'd like all signers to receive a copy to sign at the same time, click the "More Options" link
    a. Once the next screen pulls up, at the top right of the window, right under "Recipients" move the slide bar to say "Complete in Any Order"
9. Click "Next" at the bottom right and it will allow you to populate text fields and signature fields

10. Fields that you have already input information in will come up as a highlighted and fillable field, they will default to allowing anyone to input text/information, leave it this way so that should information need to be changed later, it is easily editable until after the form is signed by the last singer, which locks the form

11. Fields that you have not filled in will also come up as a highlighted and fillable field, also leave these as allowing anyone to input text/information, but ensure each signer knows which fields they are responsible for filling in

12. You will need to properly assign signature fields for each signer of your document, which will vary depending on the circumstances **NOTE: The signature fields will be detected fields and will default to whomever the first signer is. Do not add an additional signature field, use the directions below to reassign the detected fields. If you are NOT using a field, you must delete the detected signature block field, or it will require the first signer to input a signature before they can sign. THIS IS VERY IMPORTANT OR YOU WILL RUN INTO ISSUES WHEN IT IS SENT FOR SIGNATURES.**

    a. Find each relevant signature block and double click in the field
    b. You will receive a pop-up for that field where you can modify who the field is assigned to, the type of field it is and if it is required
    c. In the "Assigned To" drop down, find the appropriate signer from the list you entered at the beginning, and click "Ok" to close the pop-up
    d. Leave the "Field Type" drop down as Signature
    e. Ensure that for fields that require a signature the "Required" box is checked
    f. For the signature blocks that WILL NOT be used, you must go through and double click on the field, and at the bottom of the pop-up box select the option that says "Delete Field"

13. Once you have updated all signature blocks with either the appropriate Signer or deleted the field, you can start the routing for signatures process

14. To start the signature routing process, click the button at the bottom left of the window that says "Sign, the Send"

15. The form will go through a preparing process, and the field requiring your signature will be the only highlight signature with a red asterisk next to it

16. Click the signature box, where it says, "Click here to sign", and your signature will be input

17. Add the date of your signature in the date box next to your signature block

18. To finalize your part, click the "Click to Sign" button located at the bottom center of the window

19. Your document will come up with a confirmation window saying you have successfully signed and will be routed to subsequent signer(s) as applicable

20. After each signature occurs, you will receive an automated email notifying you of such

21. Once all signatures have been completed, all signers will receive an email indicating the form has been completed, and the completed document will be included in the automated email as an attachment

Option 2: Using the Form with Pre-Populated Fillable Fields and Signature Blocks (Straight from the OSP website)

1. Download the Fillable Proposal Routing Form PDF from the OSP website and save it to your desktop/computer
2. Open the Fillable Proposal Routing Form PDF in Acrobat DC from your desktop/computer, not from the website
3. Fill in fields applicable to form initiator
4. Once fields applicable to form initiator have been filled in, signatures can begin
5. Ensure the date of your signature is filled in next to your signature block
6. To sign this version of the form, the form initiator will need to find the applicable signature block and click on the box
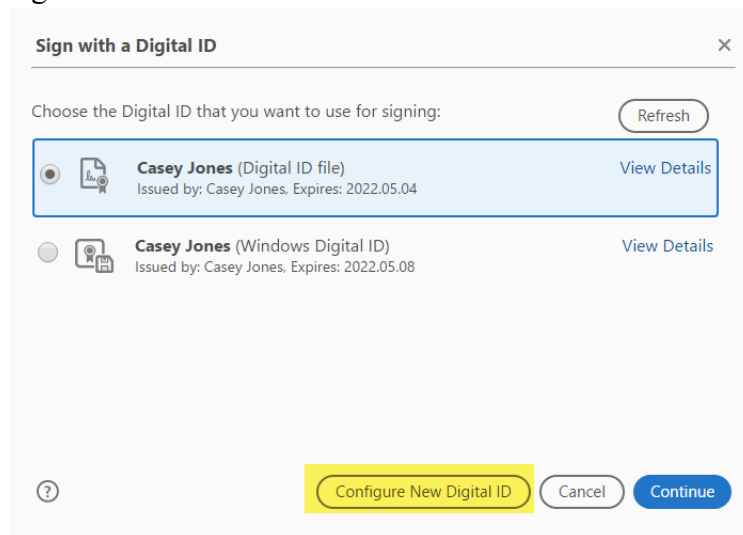
DO NOT USE THE FILL & SIGN FUNCTION WITH THIS OPTION

Instead, sign with a Digital ID. You can either select an existing one or configure a new one.

7. A pop-up window will appear that says "Sign with a Digital ID"
8. If you have a digital ID established ensure it is selected and click "Continue"
9. If your digital ID is password protected, enter the required password
10. If no digital ID is established, click the button that says "Configure New Digital ID"
    a. The pop-up window will change to say "Configure a Digital ID for signing"
    b. Select the option that says, "Create a new Digital ID" and click "Continue"
    c. You can choose to save the file in whatever location you want, click "Continue"
    d. Input the required information, click "Continue"
    e. Choose a password to protect your digital ID, click "Save"
    f. The "Sign with Digital ID" window will pup back up
    g. Select your new digital ID and click "Continue"
    h. At this point you can also customize the appearance of your digital ID by clicking the "Create" button at the top of the box, across from Appearance
    i. Once you have customized your appearance as you see fit, click "Save"
    j. Enter your digital ID password, if applicable
    k. Now you can click "Sign"
11. You will be prompted by a pop-up window to save a new version of the form, save with a document name as you see fit

12. This form can now be sent via email to subsequent signers; however, they **MUST** also follow the above outlined steps for signing for the form to continue to allow information to be input and additional signatures to be added

If you have any issues completing the form using the above outlined steps, please contact the Office of Research at oor@uccs.edu for additional assistance or visit the Adobe website. We can work through additional options on routing your form for the required signatures.

Some helpful links include:

How to fill and sign a PDF form   How to collect electronic signatures

How to sign with a Digital ID   Send documents for signatures

Helpful Tips:

1. When sending a document some of your signers may experience Adobe Sign wanting them to input information into every fillable field, in order to by-pass this, signers should click "Next required field" in the top right corner of the document window. This will take them to the next required place they need to sign or input information.
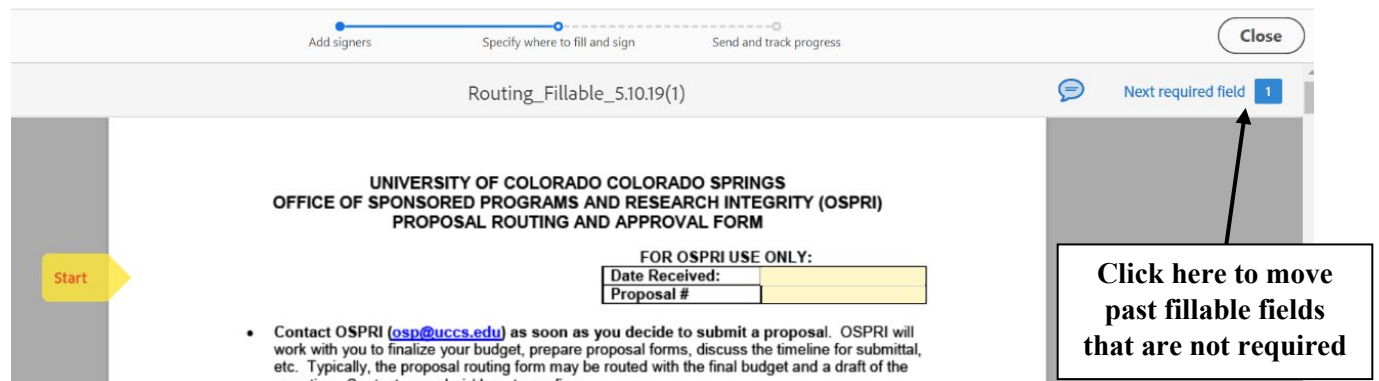
2. You can also delete unused fields by right clicking the field and selecting delete, this will prevent signers from having to click through unused fields.
3. An additional option to prevent signers from having to click through fillable fields before signing is to mark all fields that have input but don't need further input by right clicking the applicable fields and checking the "Read Only" box.
4. Linux users must use the Fill & Sign function (Option 1 above).
5. Option 2 must be used on a computer/operating system that is compatible with the Adobe desktop software (Mac OS/Microsoft Windows).