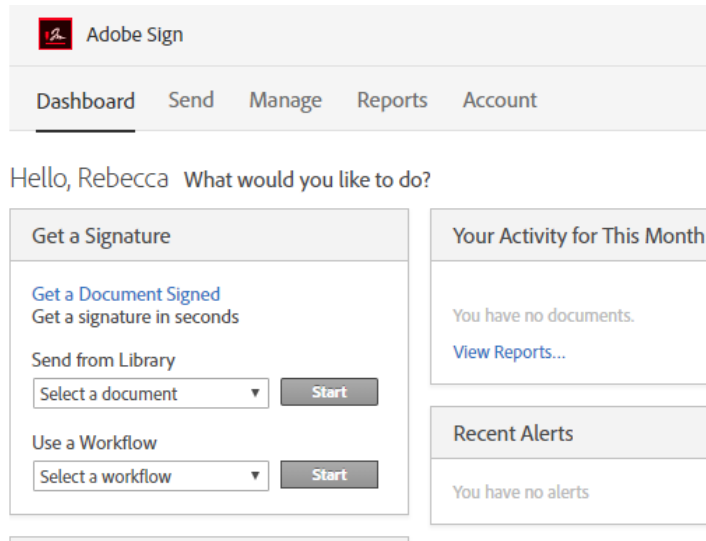


## How to Use Adobe Sign to Initiate the BioMed Proposal Cost Share Approval Form

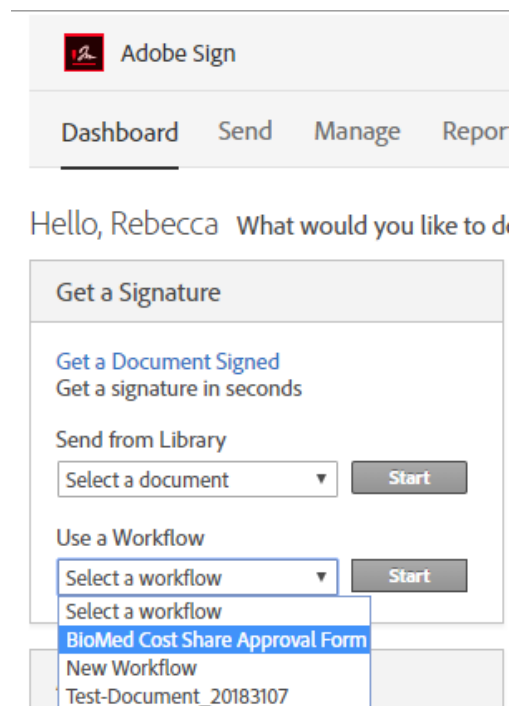
### Login to Adobe Sign

- Special Access is required before logging into Adobe Sign. Please reach out to Rebecca Martish in BMRA for access.
- Go to [documents.adobe.com](https://documents.adobe.com) (recommended you bookmark the page)
- Input your Brown email and then select sign-in with enterprise ID. You may have to complete the Brown authentication process.
- Once signed into the system, make sure you are in Dashboard view.



### Use a Workflow

- In the “Get a Signature” box go to “Use a Workflow” dropdown and select BioMed Cost Share Approval Form and click Start.



## Initiating the Cost Share Form

- After starting the workflow, you will be taken to the page below to input the appropriate emails for signatures.

BioMed Cost Share Approval Form

Initiator of Form \*: rebecca\_martish@brown.edu ✕

Approver \*:

Principal Investigator \*:

Chair/Center Director \*:

Executive Dean or Sr. Director, Finance & Data Initiatives \*:

Associate Dean of Biology \*:

TBD Signer :

TBD Signer 2 :

Cc:

Document Name: BioMed Cost Share Approval Form

Message: Please complete the BioMed Cost Share Approval form.

Documents

BioMed Cost Share Approval Form BioMed Cost Share Approval Form

Coeus Cost Share Summary by  Browse... No file selected  
Period

Additional Documents (if applicable)  Browse... No file selected

Preview, position signatures or add form fields

- **Please note:** categories with an \*require an email address. The form cannot be sent unless an email is added to the field.
  - The TBD fields are to be used when a department outside Biomed (i.e. engineering, public health, CIS) also needs to complete the form.
  - The cc can be used to include individuals who you want to see the form but are not required to sign/complete a section of the document. For MPPB and PHB you can cc Christine Conway.

Adobe Sign

Dashboard Send Manage Reports Account

BioMed Cost Share Approval Form

Initiator of Form \*: rebecca\_martish@brown.edu ✕

Approver \*:

Principal Investigator \*:

Chair/Center Director \*:

Executive Dean or Sr. Director, Finance & Data Initiatives \*:

Associate Dean of Biology \*:

TBD Signer :

TBD Signer 2 :

Cc:

- **Very Important: Please uncheck the box at the bottom (Preview, position signatures or add form fields)**

- As an Initiator- your email will automatically appear in the Initiator of Form space.
- Besides the Initiator field the Approver field does not require a signature. This field is being used so the appropriate individual in the department can add in the Cost Share source information (i.e. total approved, cost center source, and spend category). Only one line is required for cost center source information but there are several for instances when there is more than one cost center source. **Decentralized departments will need to route to someone within their office to complete the cost share source information. This may be the same person listed in the Initiator of Form field.**
- Adobe sign **does not** link to the Brown directory. Please be careful when entering emails that they are spelled correctly. If you misspell an email address you can re-assign the form to the correct email address. However, you need to wait until the form is at the incorrect email address and then you can replace the current approver.

Is your agreement waiting to be approved by someone who is currently out of the office? Did you mistype the approver's email address? Type the new approver's email address and a short message and assign a new approver to replace them.

**Please note:** Until the agreement is approved by the new approver, the original approver can still approve it. The original approver will get a copy of the approved agreement after it is fully executed.

- The Coeus Cost Share Budget will need to be attached to the document. Signers will be able to see the budget when they scroll down after the Cost Share Approval Form.
- **You can customize the message sent in the email. It is suggested you add detail indicating who the PI is and which proposal is including cost share.**

- Once all the emails and Coeus budget have been added click send. You will then be brought to the form to complete the Initiator fields. Once you are finished completing the initiator fields you will click submit and the form will be routed to the next individual (i.e. the email of the Approver), who will add in the Cost Center Source information. The form will continue to route and you will receive a final copy once everyone has signed.

**Should you have any questions please contact Rebecca Martish in BMRA at ext. 3-1881.**