

Adobe Sign Workflow – Vendor Data Record Form (VDR)

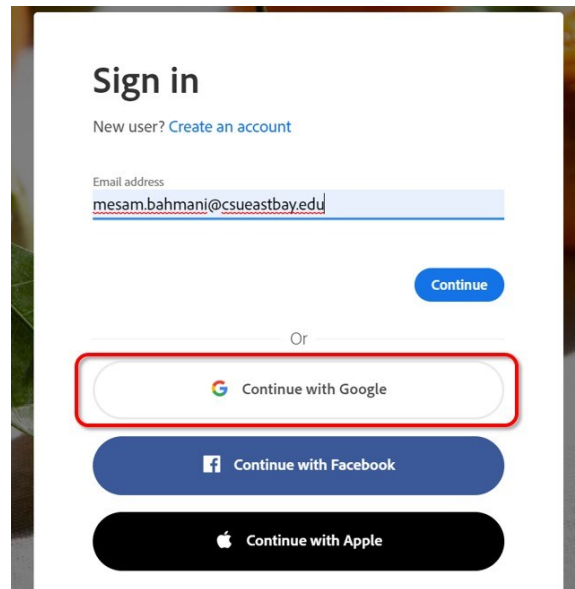
When working with a vendor who needs a VDR, the campus representative needs to inquire whether the vendor's organization has an identifying FEIN number or will be using a social security number identification (common for independent contractors, student payments, etc.).

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.

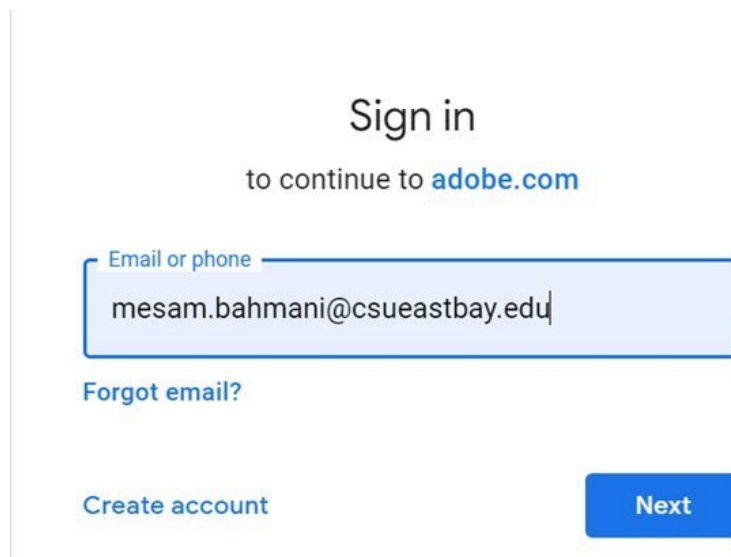
If Level 1 data (e.g., social security number) will be provided, the campus department will need to **email accounts.payable@csueastbay.edu** to make such a request. The only information that the **campus representative will include in their request is the vendor's email address**.

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.

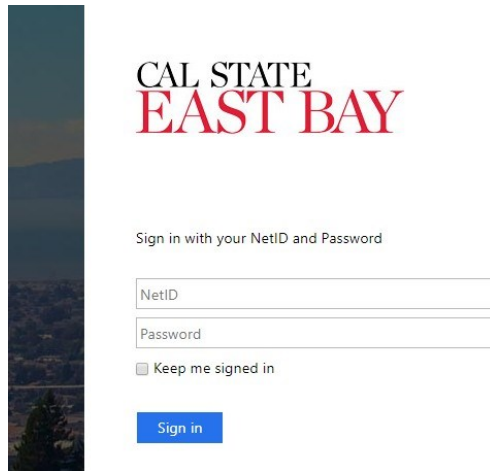
1. Log into Adobe Sign: <https://csueastbay.na2.documents.adobe.com/account/home> -> Continue with Google.



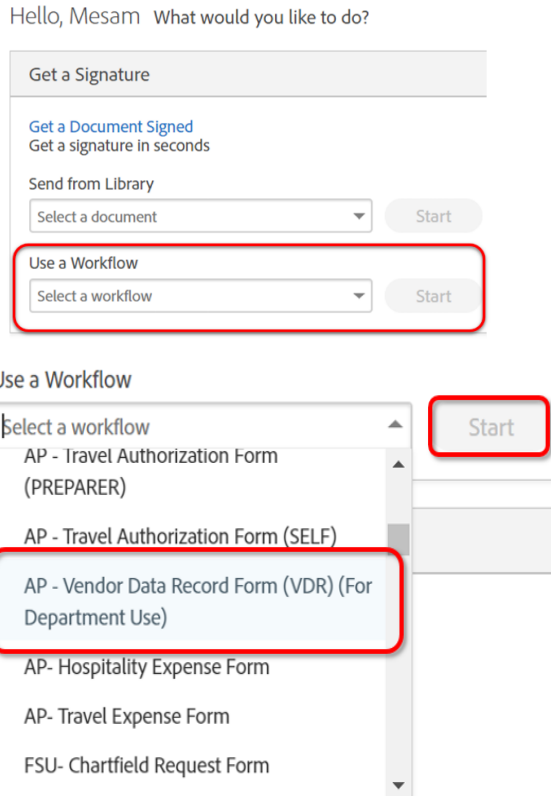
2. Enter your university email address.



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. Click “Send”, 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.

The screenshot shows the Adobe Sign interface for routing a form. The form is titled "AP - Vendor Data Record Form (VDR) (For Department Use)". The interface includes a header with "CAL STATE EAST BAY" and "POWERED BY Adobe Sign". The main content area has a "Recipients" section with a "Vendor" field (containing "Enter recipient email") and a "CC" field (containing "Enter CC's emails"). Below this is a "Document Name" field (containing "AP - Vendor Data Record Form (VDR)"). A "Message" field (containing "Please complete and sign.") is also present. The "Files" section shows a document titled "AP - Vendor Data Record Form (VDR) (Department Use)". A "Send" button is highlighted with a red box at the bottom of 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:

If Level 1 data (e.g., social security number) will be provided, the campus department will need to email general.accounting@csueastbay.edu to make such a request. The only information that the **campus representative will include in their request is the vendor's email address.**

General Accounting 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.

Part III Taxpayer Identification Number (TIN) <i>Note: Payment will not be processed without an accompanying taxpayer I.D. number.</i>																						
If vendor entity type is a corporation, partnership, estate or trust, enter FEIN.	If vendor entity type is individual or sole proprietor, enter SSN. Authority of Revenue and Taxation Code Section 18646 (See Page 2)																					
Federal Employer Identification Number	Social Security Number																					
OR																						
<table border="1"><tr><td></td><td></td><td>-</td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></tr></table>			-								<table border="1"><tr><td></td><td></td><td></td><td>-</td><td></td><td></td><td>-</td><td></td><td></td><td></td><td></td></tr></table>				-			-				
		-																				
			-			-																
