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.

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.

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.