

## Using Adobe Sign for COVA W9s

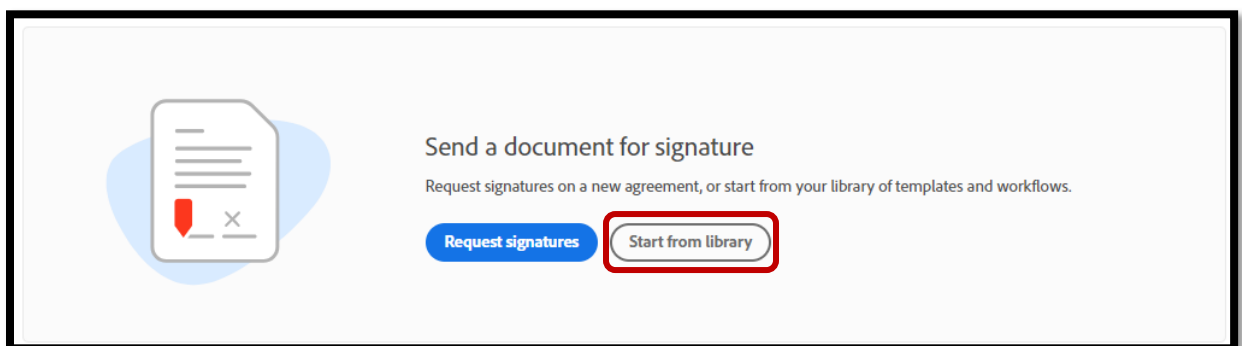
Adobe Sign is now available at JMU for electronic signature needs.

Adobe Sign is a cloud-based e-signature service that can be used in a browser, or on a mobile device. The service allows JMU faculty and staff to create, send, track, and manage documents that can be signed by anyone. Signers are not required to log in to Adobe Sign to sign a document.

The Finance Office has uploaded a template of the COVA W9 into Adobe Sign to facilitate a quick and easy way to get a completed, digitally signed W9 needed for vendor setups.

Please follow the steps below to obtain access to Adobe Sign and use the COVA W9 template to send to vendors.

1. Request Access to Adobe Sign.
  - Faculty and staff may obtain access, but do not get it automatically as active employees.
  - A link to the access request form in Cherwell can be found on the [Electronic Signature Page](#)
  - Once you get an access confirmation via email, proceed with step 2.
2. Login to [Adobe Sign](#)
  - Enter full email address on this Adobe Sign page. This will redirect you to the JMU single-sign-on page.
  - Login with eID and password.
3. Click on 'Start from library'.



4. Click on 'Templates' and then the Commonwealth of Virginia W9 (COVA W9). Click Start.

The screenshot shows a 'Start from library' dialog box. On the left, a sidebar contains 'Library', 'Recent Templates', and 'Templates' (highlighted with a red box). The main area features a search bar and a table of templates. The table has columns for 'Name' and 'Last Modified'. The 'Commonwealth of Virginia W9 (COVA W9)' template is highlighted with a red box. At the bottom right, there are 'Cancel' and 'Start' buttons, with the 'Start' button highlighted by a red box.

| Name  | Last Modified |
|---|---------------|
| Default Group (Primary Group) Templates                     |               |
| Boyd Test   | 01/12/2022    |
| Account Templates   |               |
| Commonwealth of Virginia W9 (COVA W9)                       | 02/10/2022    |
| Giving Day 2022 Challenge Gift Form                         | 11/11/2021    |
| Probationary Progress Review Test 2                         | 02/14/2022    |
| SADAH Photo Release   | 11/15/2021    |
| Adobe Sign Templates  |               |
| I-9 (Employment Eligibility Verification) ver. 10/21/2019   | 09/19/2020    |
| W-4 2021 (Employee's Withholding Certificate)               | 01/25/2021    |
| W-9 (Request for Taxpayer Identification Number) ver. 10/18 | 09/19/2020    |

5. Enter the recipient's email into Recipient field #1.
6. Add any additional files or message needed for the recipient.
  - The COVA W9 template for them to complete and sign is already attached to this in the Files section. Drag in any additional files/documents you would like to send.
  - There is a default message and subject line included. This can be overwritten or added to if desired.
  - Click 'Next' when ready to proceed.

### Get documents signed

Send an agreement to others for e-signing, approval, or other processing.

Send from: Default Group (Primary Group) ▼ ?

**Recipients\***

Complete in Order  Complete in Any Order  [Add Me](#) | [Add Recipient Group](#) | ?

|   |  |  |  |         |  |  |
|---|--|--|--|---------|--|--|
| 1 |  | <input type="text" value="test@gmail.com"/>        |  | ▼ Email |  |  |
| 2 |  | <input type="text" value="Enter recipient email"/> |  |         |  |  |

[Show CC](#)

**Message\***

Commonwealth of Virginia W9 (COVA W9)

Please review and complete Commonwealth of Virginia W9 (COVA W9).

**Files\*** [Add Files](#)

Commonwealth of Virginia W9 (COVA W9) ×

Drag More Files Here

Preview & Add Signature Fields

**Options** ?

Password Protect

Completion Deadline

days

to complete this agreement.  
Agreement expires after Mar 19, 2022.

Set Reminder

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Recipients' Language

▼

7. The next page is a preview of the W9 being sent.
  - Do not make any field adjustments here.
  - Click 'Send' when ready.

OTH Government

Other

code (if any):

Reset Fields

Save as template

Back Send

Save Progress

8. The COVA W9 is now out for signature. You will receive email notifications for the request going out, and additional notifications when the document is signed and returned to you.