DEPOSIT REQUEST FORM – CHEAT SHEET

REQUESTER:

Step 1 – Customize Notifications: Before sending, you may want to customize which notifications you receive. Go to my.pitt.edu > **DocuSign** > profile icon (upper right corner) > **Preferences** > **Member Profile** > **Manage Email Notifications**.

Step 2 – Recipients: 1. **Requester** – fill in your name and email. 2. **Dean, Director or Campus President** - fill in recipient name and email. 3. **Senior Officer** – fill in recipient name and email, ***Health Sciences only, otherwise leave blank***. Do not edit **Provost, Student Financial Services**, or **Registrar,** they are set to pre-populated Account Signing Groups.

Step 3 – Form Data: Complete the form fields; **required fields are highlighted in red**. Click **Finish** to finalize your changes and route the document to the next recipient. **You will not able to make any additional edits after clicking FINISH**. To view the form's progress, go to **DocuSign > Manage > Search Folders > Out for Signature > Summary**. You will receive a final email with the completed document attached. If you need to cancel the form, open the form from the DocuSign > Manage screen and click **Other Actions > Void**.

DEAN, DIRECTOR or CAMPUS PRESIDENT / SENIOR OFFICER (Health Sciences only) / PROVOST: You will receive an email stating that you have been sent a document to review and sign. Click the **Review Documents** link in the email, and click in the highlighted field on the form to sign. Click **Finish** to finalize your changes and route the document to the next recipient.

ALL RECIPIENTS WILL RECEIVE A FINAL EMAIL WITH THE COMPLETED DOCUMENT ATTACHED.
DOUBLE-CHECK THE COMPLETED DOCUMENT FOR ANY COMMENTS OR CHANGES.
DocuSign Support: https://support.docusign.com (DocuSign > Home > Need Help?)
"Other Actions" Guide: https://support.docusign.com/en/guides/cdse-user-guide-signing-sign-other-actions-new