**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](https://support.docusign.com) (DocuSign > Home > Need Help?)