**REQUESTER:**

**Step 1 – Customize Notifications:** Before sending, you may want to customize which notifications you receive. Go to [my.pitt.edu](http://my.pitt.edu) > DocuSign > profile icon (upper right corner) > My Preferences > Signing & Sending > 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 – Attachments:** Add attachments (e.g., **Provost’s approval**) by clicking the tag at the top of the form. After attaching, they will be visible after page two of the form. You can also attach extra pages for **Course Fee Data** or **Tuition and Other Fee Data** if needed - the form includes 16 lines for Course Fee Data and 5 lines for Tuition and Other Fee Data on page two.

**Step 4 – 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 be able to make any additional edits after clicking Finish.** To view the form's progress, go to **DocuSign > Manage > Quick Views > Waiting for Others**. 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 **Quick Views > Waiting for Others** > right-hand drop down menu > 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.

**STUDENT FINANCIAL SERVICES:** 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 determine if the **Registrar** needs to receive a copy.

**Registrar Copy Needed:** If the Requester did not fill **Item Type 1 and/or 2** above, complete the **Item Type 1 and/or 2** fields under **Approvals > Student Financial Services**. Click the **Approve** button on the form to route the document to the Registrar.

**No Registrar Copy Needed:** Click **Other Actions > Correct** from the top navigation bar. From the **Add Recipients to the Envelope** section, remove the **Registrar role** by clicking the “x” button on that line.

Confirm by clicking **Delete**. Click **Next** to continue, and then **Correct** at the top of the next page. Go to **DocuSign > Search Folders > Awaiting My Signature** and double-click the document to open it. If the Requester did not fill **Item Type 1 and/or 2** above, complete the **Item Type 1 and/or 2** fields under **Approvals > Student Financial Services**. Click the **Approve** button.

**REGISTRAR:** If Student Financial Services has determined that the Registrar needs to receive the document, you will receive an email stating that they sent you a document to review and sign after they have completed their portion. Click the **Review Documents** link in the email and add any optional commentary in the **Registrar Review-Optional section** (up to 510 characters), then click the **Approve** button. Clicking the **Approve** button closes and completes the document and you will not be able to make any further edits. **You must click APPROVE to complete the document.**

**ALL PARTICIPANTS 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 > Support Home)