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 – 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 > 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.

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 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?)