



University of Pittsburgh School of Medicine Office of Graduate Studies

Instructions for Changes to Student's Committee or a Graduate Faculty's appointment:

1. Templates are available via DocuSign.
2. Log in to my.pitt.edu
3. On the right panel of available resources, find "DocuSign" – click on it.

my_pitt_home/805

The screenshot displays the my.pitt.edu homepage with several content blocks. On the left, there are sections for 'Pitt Creates Year of Creativity', 'Plans Progress on Bigelow', and 'Pitt Commons'. In the center, there is a section for the 'National Center for Faculty Development & Diversity' and 'The IT Plan for Pitt'. On the right, a vertical sidebar lists various services: Office 365, PRISM, PittFundsMe, Emergency Notification Service (ENS), pitt.box.com, Access Curriculum, Cognos, Concur Travel & Expense, DocuSign, Effort Certification System (ECC), and Electronic Research Notebooks (LabArchives). A red arrow points to the DocuSign entry in this sidebar.

Office 365
Use a suite of powerful online collaboration tools from any device.

PRISM
Access timecards, payroll changes, view pay statements, benefit details, and expense reports.
Learn More

PittFundsMe
A searchable scholarship database.

Emergency Notification Service (ENS)
Register to receive critical information in the event of an emergency.

pitt.box.com
Access unlimited cloud storage and online collaboration tools.

Access Curriculum
Curriculum management software.

Cognos
View and analyze data in the University Data Warehouse.
Learn More

Concur Travel & Expense
Travel online booking and expense management system.

DocuSign
Send, sign, and manage documents electronically.

Effort Certification System
Access Pitt's Effort Certification System (ECC).
Learn More

Electronic Research Notebooks (LabArchives)
Store, manage, and share your lab data securely online.

4. Click on the "Templates" page

DocuSign eSignature Home Manage **Templates** Reports

Sign or Get Signatures **NEW**

OVERVIEW Last 6 Months

- Action Required
- Waiting for Others
- Expiring Soon
- Completed

WHAT'S NEW

Comments: Ask and answer questions about documents and receive real-time comment notifications. [More info](#)

Bulk Send for Multiple Recipients: Include multiple recipients in each envelope. Send to more recipient types and specify envelope custom field values. [More info](#)

Template Sorting: Sort your templates by name.

MY DOCUSIGN ID Edit

Deepthi Ramadoss
du730@pitt.edu
Member since 2020

DocuSigned by:
Deepthi Ramadoss
2852042W1HCE...

ESTIMATED ENVIRONMENTAL IMPACT

You've Reduced Carbon Emissions by **113,230 LB**
By using DocuSign instead of paper, University of Pittsburgh has reduced carbon emissions by 113,230 pounds.
[See your total estimated impact](#)

WE WANT YOUR FEEDBACK

Want to be the first to try out new features and give feedback on new ideas?
[Join Our Customer Panel](#)

HELP AND SUPPORT

- Support Home
- Community
- Trust Center

5. Click on the arrow next to "Shared Folders" on the left menu tab, to expand the folder. Select Change in Status/Committee forms.

DocuSign eSignature Home Manage **Templates** Reports

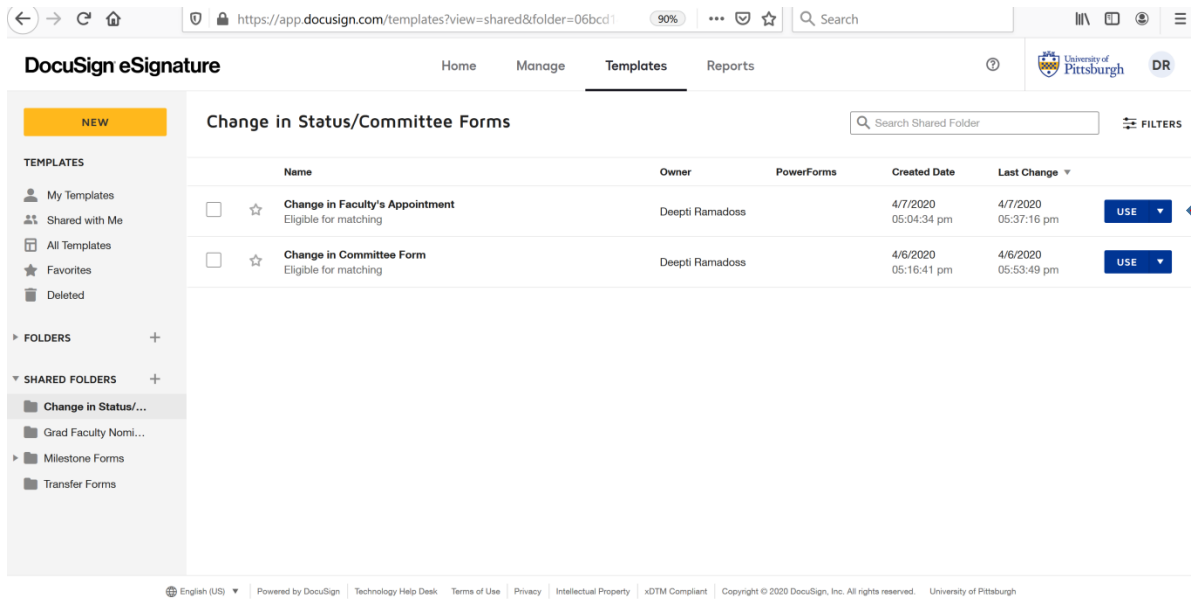
Change in Status/Committee Forms

Search Shared Folder FILTERS

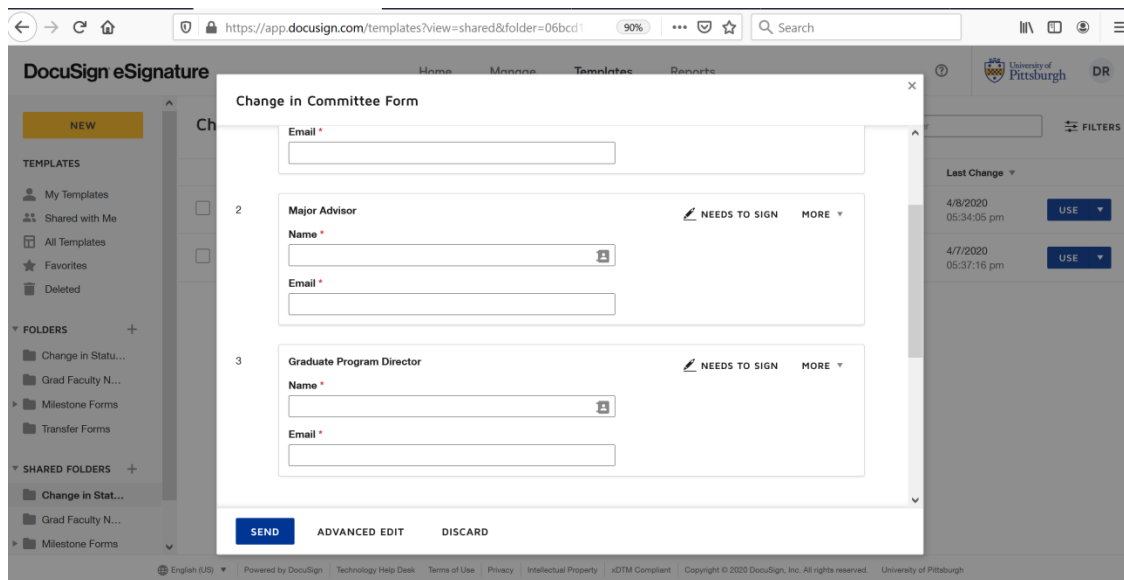
	Name	Owner	PowerForms	Created Date	Last Change	
<input type="checkbox"/>	★ Change in Faculty's Appointment Eligible for matching	Deepthi Ramadoss		4/7/2020 05:04:34 pm	4/7/2020 05:37:16 pm	USE
<input type="checkbox"/>	★ Change in Committee Form Eligible for matching	Deepthi Ramadoss		4/6/2020 05:16:41 pm	4/6/2020 05:53:49 pm	USE

English (US) Powered by DocuSign Technology Help Desk Terms of Use Privacy Intellectual Property xDTM Compliant Copyright © 2020 DocuSign, Inc. All rights reserved. University of Pittsburgh

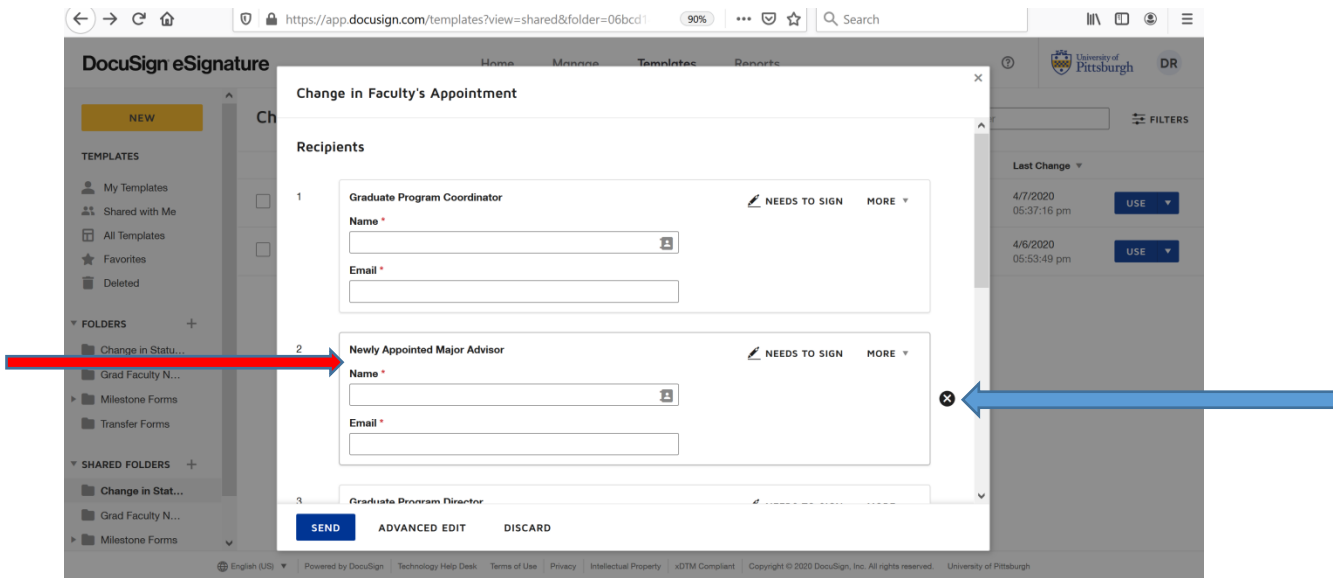
6. Click “use” on the Change form template you want to use (i.e. Change in Faculty’s Appointment or Change in Committee).



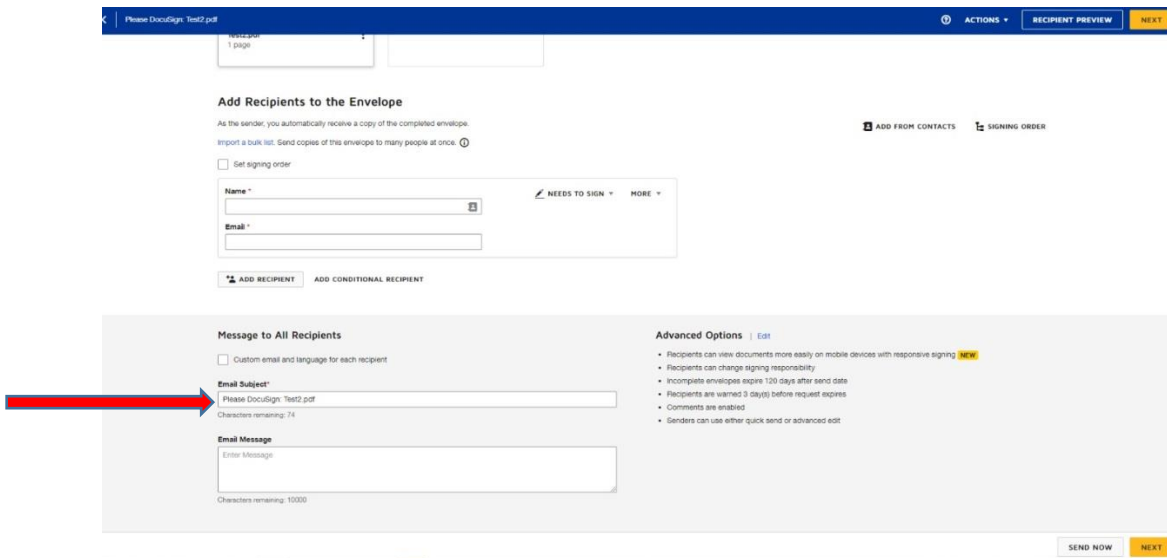
- 7.
- For either form, fill in the Graduate Program Coordinator name and email address.
 - For Change in Committee Form:** fill in the name and email address of the major advisor and program director as well.



- c. **For Change in Faculty's Appointment:** **ONLY IF** the change in the faculty's appointment is resulting in a new major advisor for a student, fill in the new major advisor's name+email address (red arrow), and scroll down for Graduate Program Director. If not, hover over the field, and then click on the "X" next to each of those fields to remove it (blue arrow).

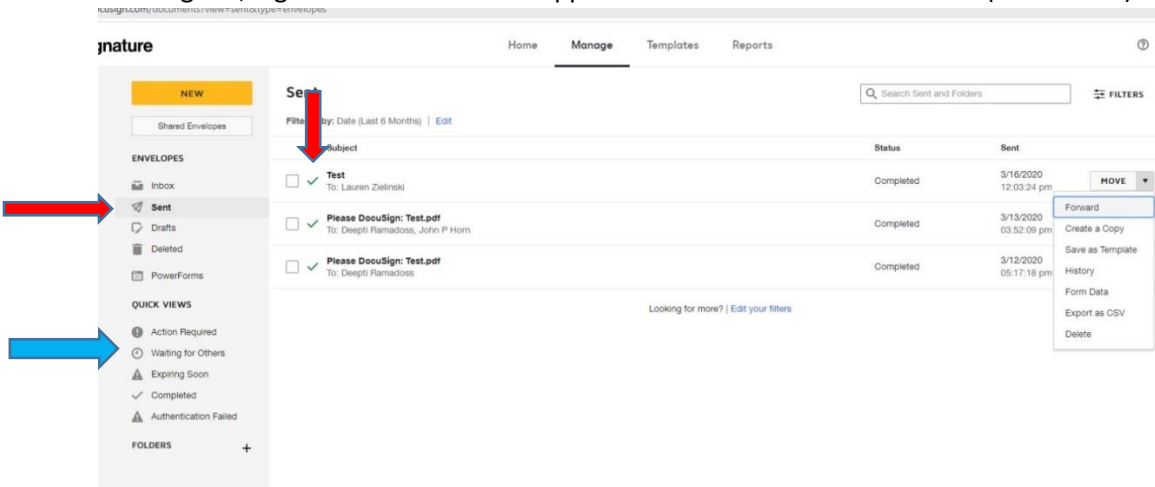


8. In the field "Message to All Recipients" enter the email subject "Please DocuSign: **Student Name** Change in Committee". Enter a message if you would like.

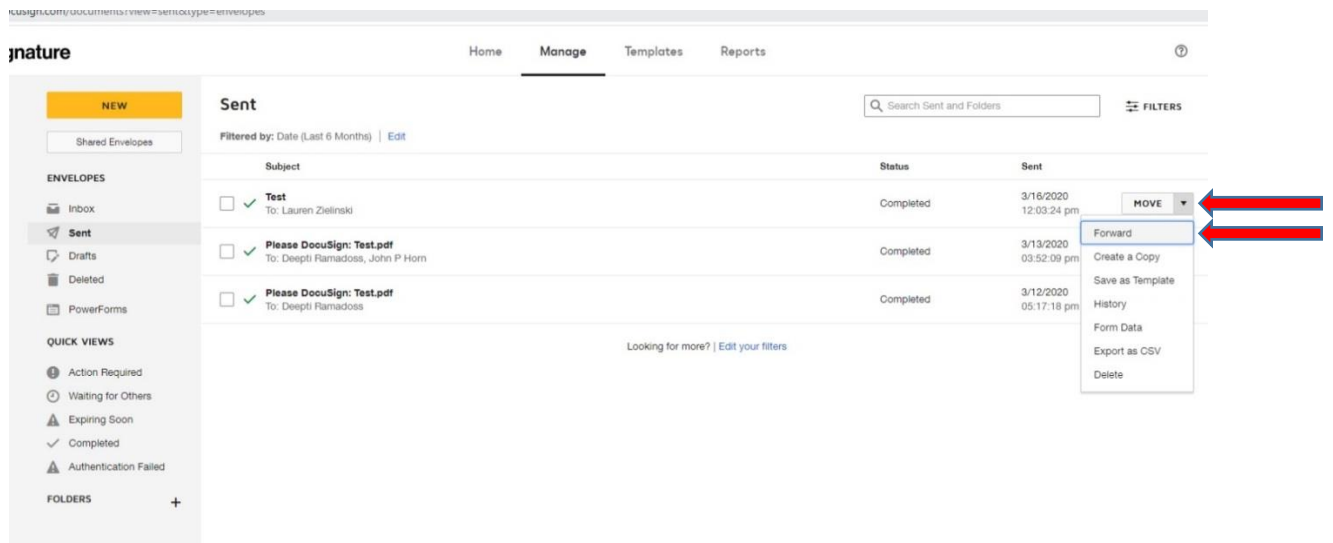


9. Select "Send"
10. If you are listed as program coordinator, you will receive a notification immediately asking you if you want to sign the document. You can either do it immediately, or later. This will take you to the milestone form itself, where you have to enter the student's information.
11. Fill out the required fields in the form.

12. You will be able to see when all recipients have signed it in the “Manage” page; check on “Sent” tab. When all have signed, a green check mark will appear. You can also see other views (blue arrow).



13. When a form is complete (i.e. all the faculty have signed it), click on the arrow next to “Move”, and select “Forward”.



14. Enter Name: Lauren Zielinski; email: lez26@pitt.edu; Change the action from “Needs to Sign” to “Receives a Copy”, so that Lauren receives a copy in DocuSign and can process the paperwork in PeopleSoft.

The screenshot shows the DocuSign interface for adding recipients. At the top, there is a navigation bar with 'ACTIONS', 'RECIPIENT PREVIEW', and 'NEXT' buttons. Below this is the 'Add Recipients to the Envelope' section. It includes a checkbox for 'Set signing order', a 'Name' field, an 'Email' field, and a dropdown menu currently set to 'NEEDS TO SIGN'. A red arrow points to this dropdown. Below the fields are 'ADD RECIPIENT' and 'ADD CONDITIONAL RECIPIENT' buttons. The bottom section contains 'Message to All Recipients' with a 'Custom email and language for each recipient' checkbox, an 'Email Subject' field (containing 'Please DocuSign: Test2.pdf'), and an 'Email Message' field. To the right is an 'Advanced Options' section with a list of settings. At the bottom right, there are 'SEND NOW' and 'NEXT' buttons.

15. Enter Email Subject “**Student Name** Change in Committee”, add Message if you would like to, and Select Send Now.

This screenshot is similar to the previous one, showing the 'Add Recipients to the Envelope' screen. In this instance, the 'Email Subject' field contains the text 'Please DocuSign: Test2.pdf'. A red arrow points to the 'SEND NOW' button at the bottom right of the screen.