



University of Pittsburgh School of Medicine Office of Graduate Studies

NEW Instructions for Signatures for Milestone Forms:

1. Milestone form 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 shows a dashboard with various resource tiles. On the right side, there is a vertical list of service tiles. A red arrow points to the 'DocuSign' tile, which is the fourth item from the top of this list. The tiles include: Office 365, PRISM, PittFund\$Me, Emergency Notification Service (ENS), pitt.box.com, Access Curriculum, Cognos, Concur Travel & Expense, DocuSign, Effort Certification System, and Electronic Research Notebooks (LabArchives).

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

PittFund\$Me
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

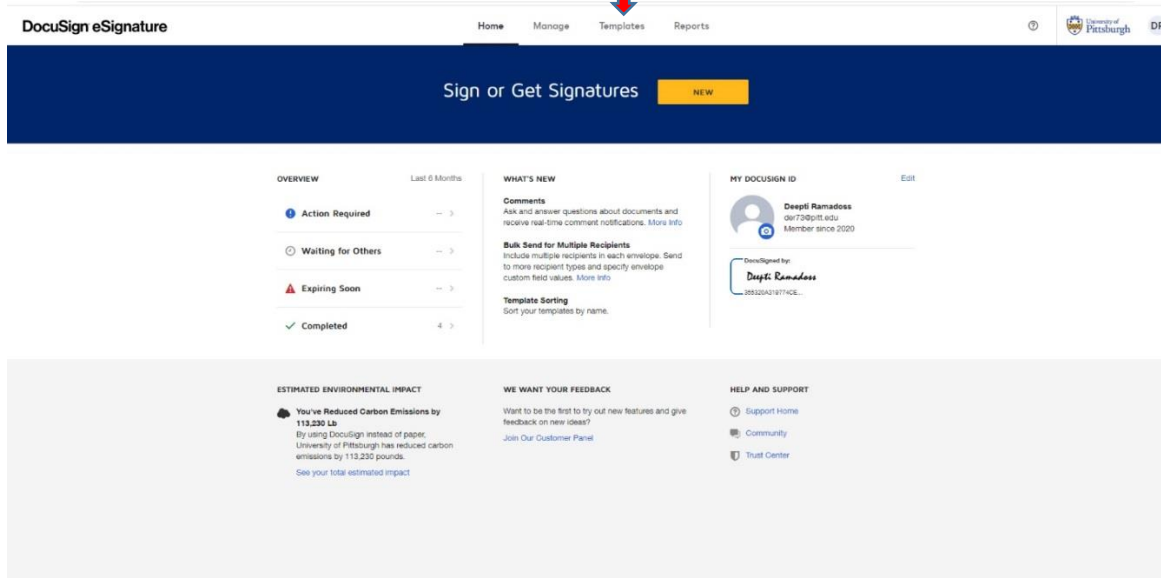
Concur Travel & Expense
Travel online booking and expense management system.

DocuSign
Send, sign, and manage documents electronically.

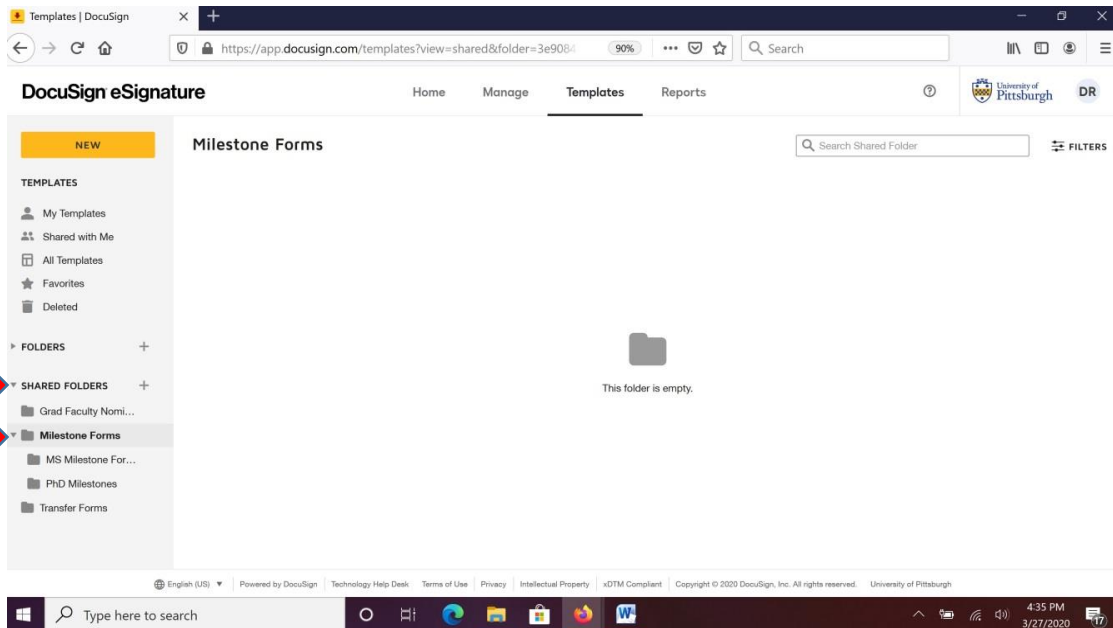
Effort Certification System
Access Pitt's Effort Certification System (ECC).
Learn More

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

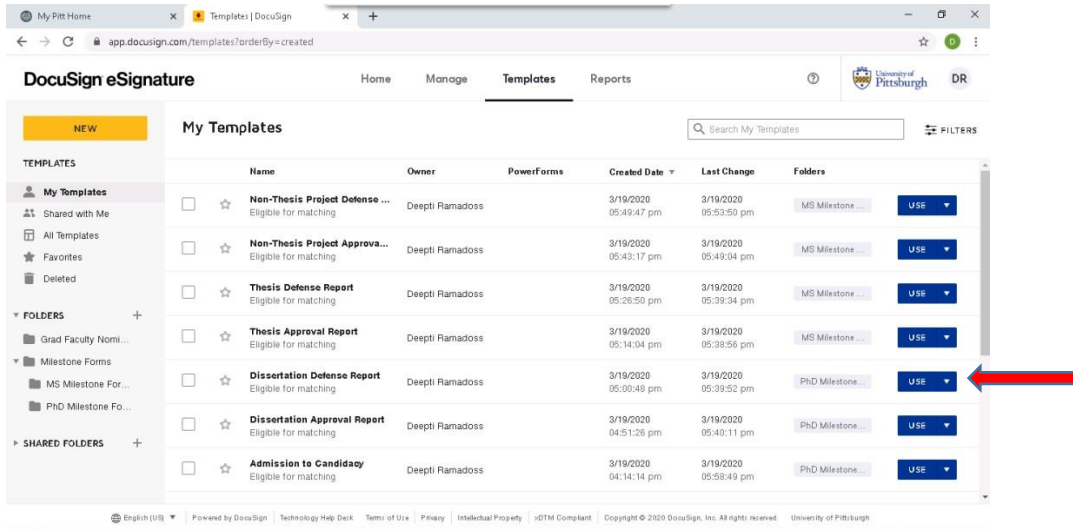
4. Click on the “Templates” page



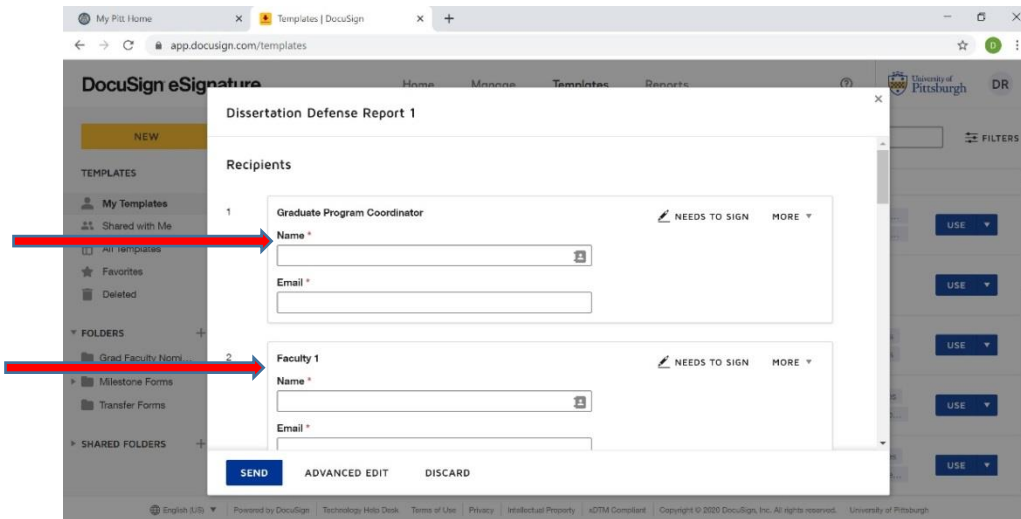
5. Click on the arrow next to “Shared Folders” on the left menu tab, to expand the folder. Click on the arrow next to Milestone Forms, and it will expand to two sub folders, MS Milestone Forms and PhD Milestone Forms. Click on those folders, to see all the milestone forms for that degree.



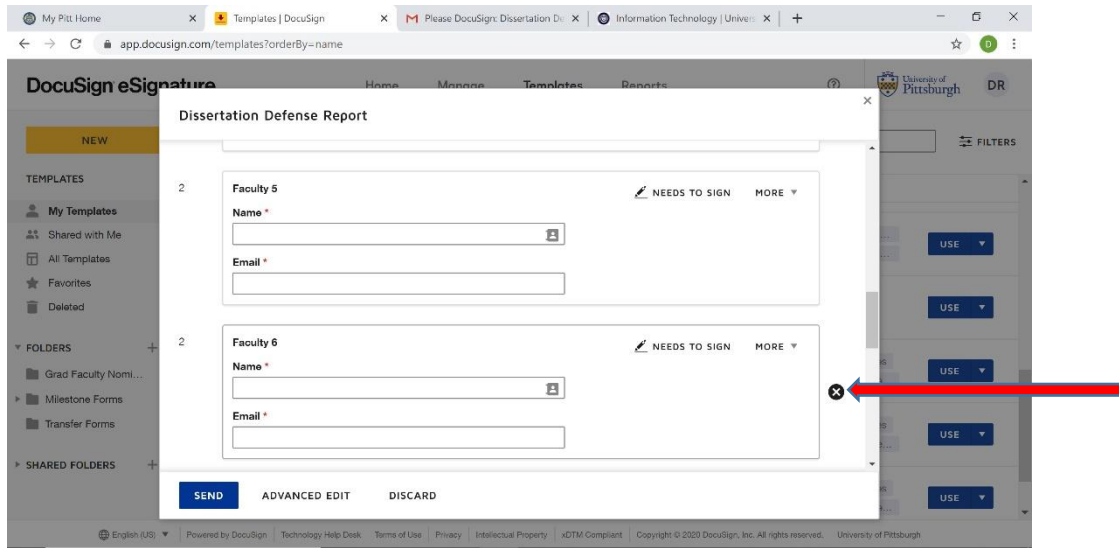
6. Click “use” on the milestone template you want to use.



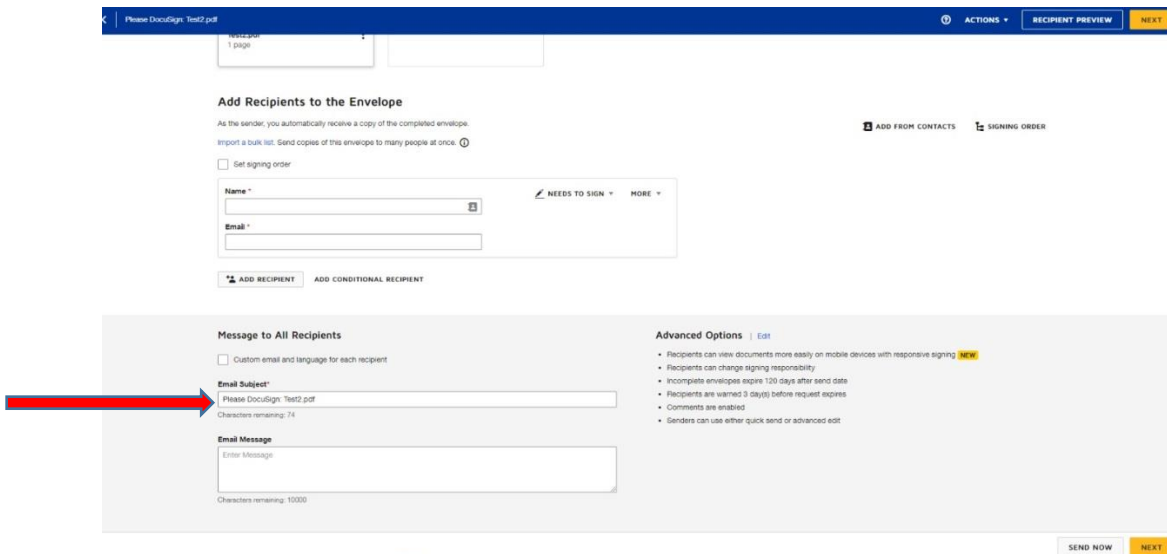
7. Fill in the Graduate Program Coordinator name and email address, followed by name and email address of each Faculty member who needs to sign.



8. **If there are more Faculty listed than you need on your form**, you can delete the extra fields. Hover over the field, and you will see an “X” next to the field appear. Click on the “X”. It will warn you that the field you want to delete has other fields associated with it, and will ask you if you want to delete. Click on DELETE. **Note: You cannot delete “Chair”.** If a milestone has no Chair, fill the Chair role with the Advisor’s name/email address.



In the field “Message to All Recipients” enter the email subject “Please DocuSign: **Student Name Milestone Name**”. 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 milestone form, e.g. shown below.

DocuSign Envelope ID: A270ED47-A20B-4529-8062-88FC32616BD9

DISSERTATION DEFENSE REPORT
 Doctor of Philosophy
 University of Pittsburgh School of Medicine Graduate Studies

Student Name	People Soft ID	Date of Defense
Academic Program		<input type="checkbox"/> Passed <input type="checkbox"/> Failed
		<input type="checkbox"/> Passed with Revisions
COMMITTEE MEMBER Signature		Print Name

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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).

jnature Home Manage Templates Reports

NEW Shared Envelopes

ENVELOPES
 Inbox
Sent
 Drafts
 Deleted
 PowerForms

QUICK VIEWS
 Action Required
 Waiting for Others
 Expiring Soon
 Completed
 Authentication Failed

FOLDERS +

Sent Filtered by: Date (Last 6 Months) | Edit

Subject	Status	Sent
<input type="checkbox"/> <input checked="" type="checkbox"/> Test To: Lauren Zielinski	Completed	3/16/2020 12:03:24 pm
<input type="checkbox"/> <input checked="" type="checkbox"/> Please DocuSign: Test.pdf To: Deepthi Ramadoss, John P Horn	Completed	3/13/2020 03:52:09 pm
<input type="checkbox"/> <input checked="" type="checkbox"/> Please DocuSign: Test.pdf To: Deepthi Ramadoss	Completed	3/12/2020 05:17:18 pm

Looking for more? | Edit your filters

MOVE
 Forward
 Create a Copy
 Save as Template
 History
 Form Data
 Export as CSV
 Delete

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

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FOLDERS +

Sent Filtered by: Date (Last 6 Months) | Edit

Subject	Status	Sent
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Looking for more? | Edit your filters

MOVE
 Forward
 Create a Copy
 Save as Template
 History
 Form Data
 Export as CSV
 Delete

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', input fields for 'Name' and 'Email', and a dropdown menu currently set to 'NEEDS TO SIGN'. A red arrow points to this dropdown. Below the input fields are 'ADD RECIPIENT' and 'ADD CONDITIONAL RECIPIENT' buttons. The bottom section is titled 'Message to All Recipients' and contains a checkbox for 'Custom email and language for each recipient', an 'Email Subject' field with the text 'Please DocuSign: Test2.pdf', and an 'Email Message' text area. To the right of this section is an 'Advanced Options' panel with several bullet points. At the bottom right, there are 'SEND NOW' and 'NEXT' buttons.

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

This screenshot is identical to the one above, showing the 'Add Recipients to the Envelope' screen. However, the 'Email Subject' field now contains the text 'Please DocuSign: Test2.pdf'. A red arrow points to the 'SEND NOW' button at the bottom right of the page.