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.

4. Click on the "Templates" page
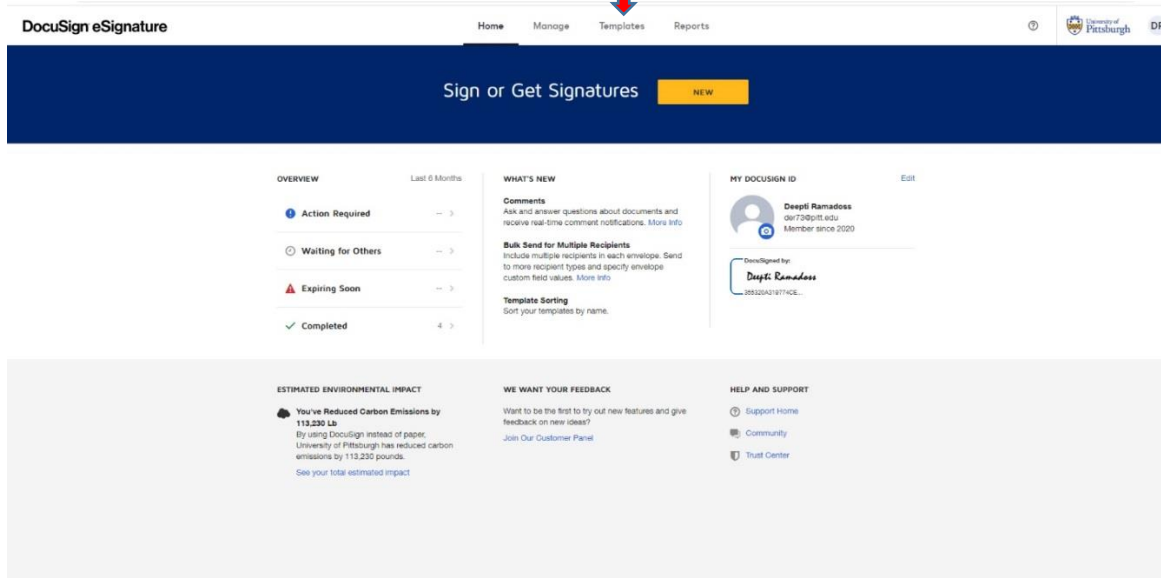
5. Click on the arrow next to "**Shared Folders**" on the left menu tab, to expand the folder. Click on the arrow next to Milestone Forms, and it will expand to two s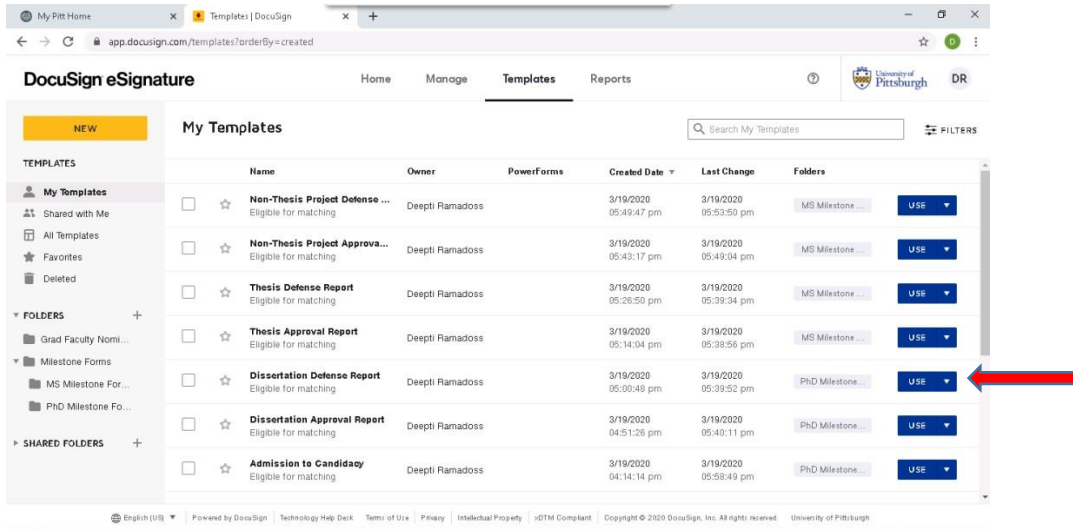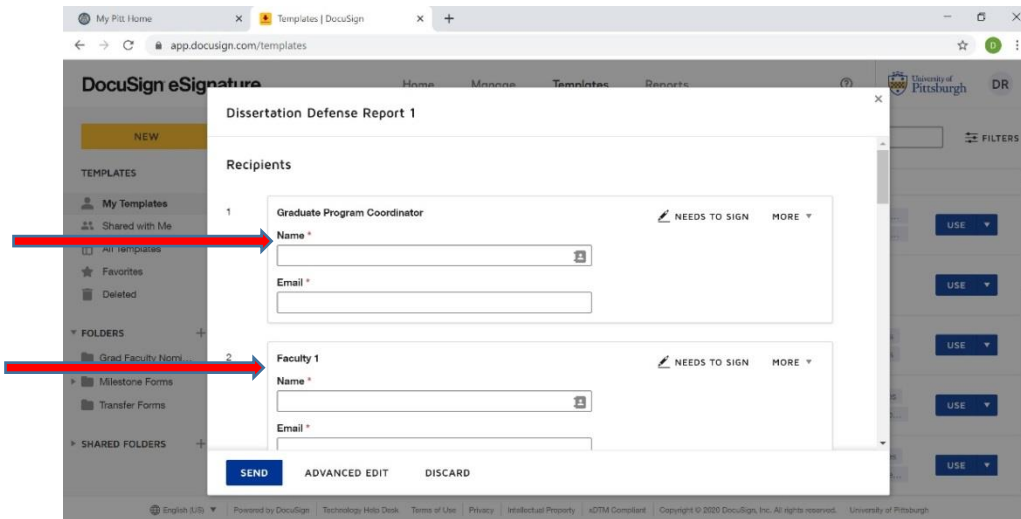ub folders, MS Milestone Forms and PhD Milestone Forms. Click on those folders, to see all the milestone forms for that degree.
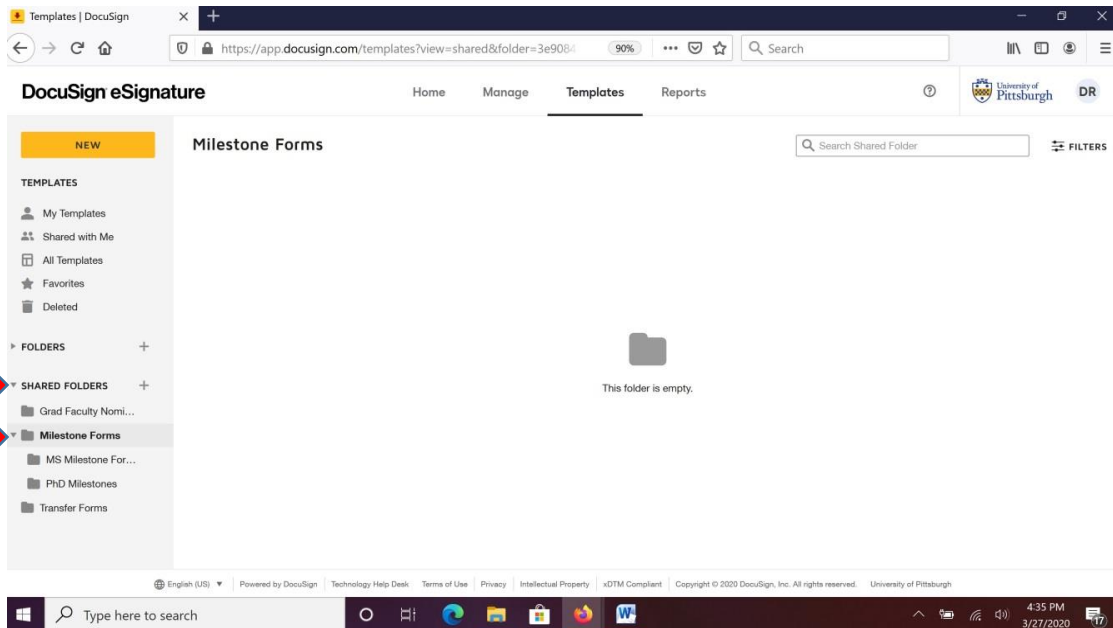
6. Click "use" on the milestone template you want to use.

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.*
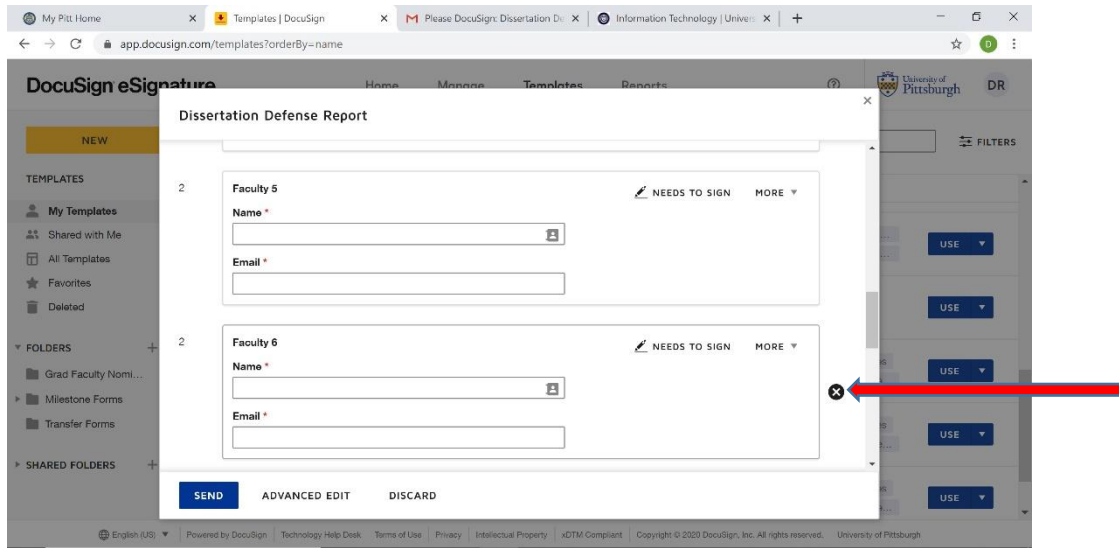
In the field "Message to All Recipients" enter the email subject "Please DocuSign: **Student Name** Milestone Name". Enter a message if you would like.
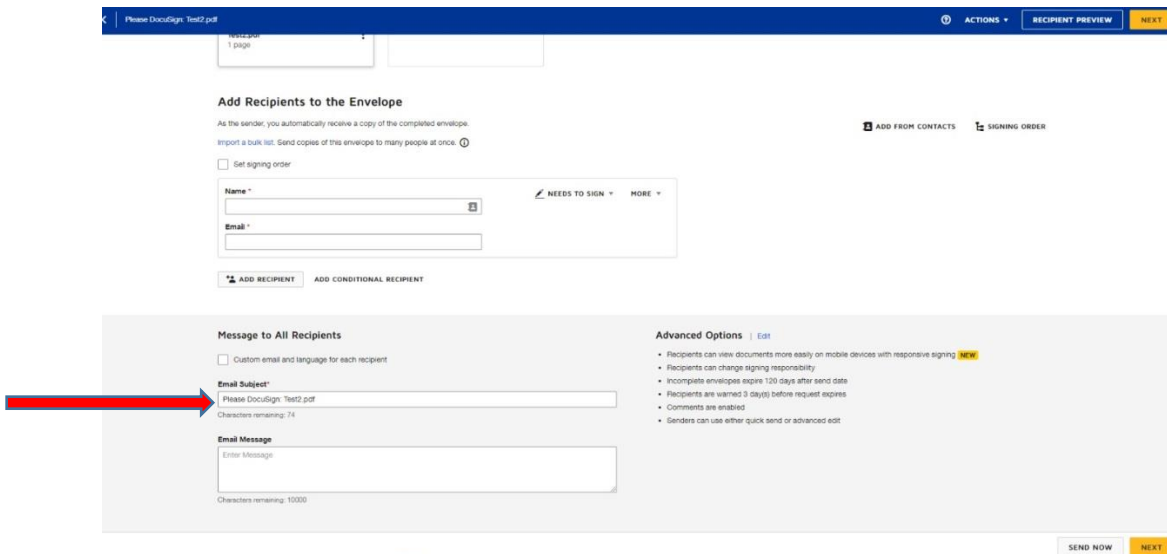
9. Select "**Send**"

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.

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 milestone 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.**

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