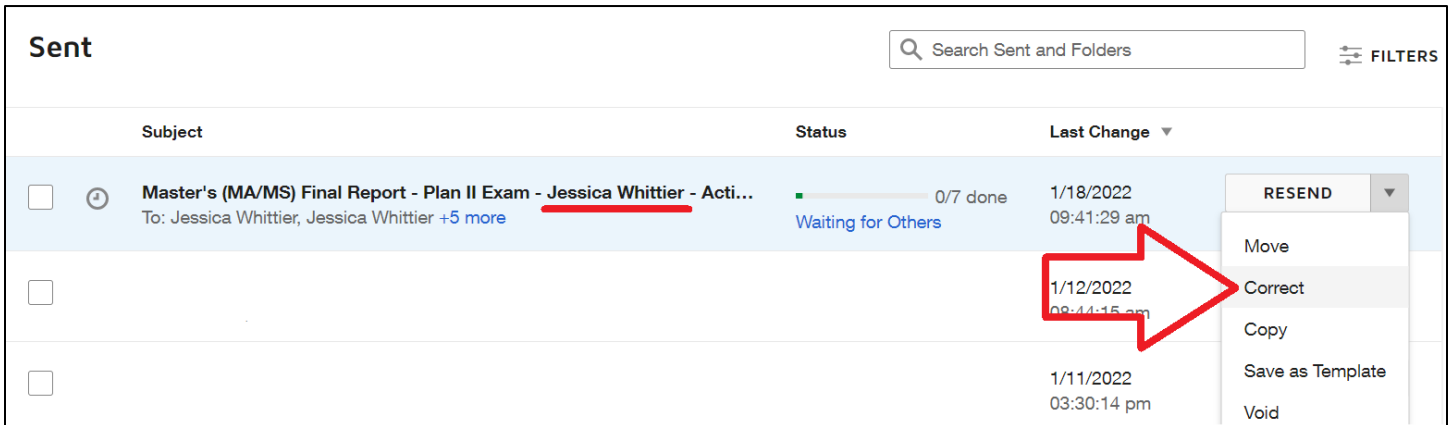


Correcting a sent Docusign form

Editing the Email Subject line to add student major code and PID

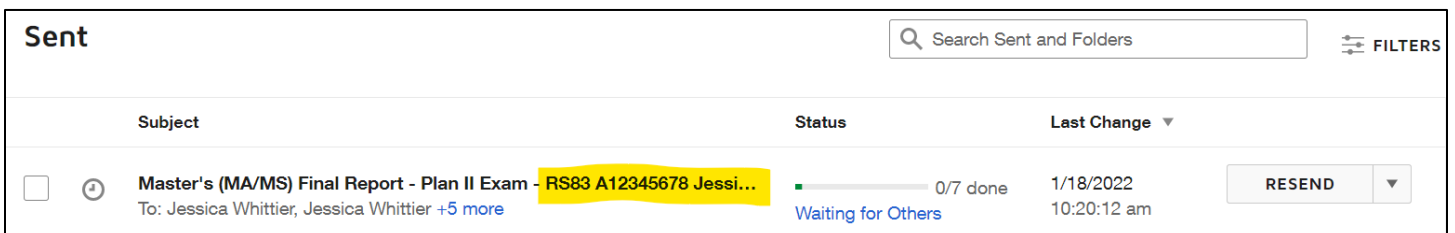
1. Go to the form in Docusign, click the arrow for the drop-down menu, and hit the “Correct” button. If having trouble finding it, check your Inbox and Sent folder.



2. On the next screen, scroll down to the bottom past the signature routing information. There will be a section where you can edit the Email Subject line. Add the student’s major code and PID before or after the student’s name.

The screenshot shows the 'Message to All Recipients' form. It has a checkbox for 'Custom email and language for each recipient'. Below that is the 'Email Subject *' field, which contains the text 'Master's (MA/MS) Final Report - Plan II Exam - RS83 A12345678 Jessica Whittier - Action ...'. The text 'RS83 A12345678' is highlighted in yellow. Below the subject field, it says 'Characters remaining: 4'. There is also an 'Email Message' field with the placeholder text 'Enter Message'.

3. Hit the yellow “Next” button to go to the next page, and then the yellow “Correct” button to save changes.



To prevent having to correct the Email Subject

When first initiating the form, the Email Subject will have the text `[[Student_UserName]]` that auto-populates the student name. Add the student's major code and PID before or after the brackets. **Note that editing any part in the `[[Student_UserName]]` brackets will not auto-populate the name.**

Master's (MA/MS) Final Report - Plan II Exam - combined

Message to All Recipients **Advanced Op**

Custom email and language for each recipient

Email Subject *

- Plan II Exam - `[[Student_UserName]]` - Action Required

Characters remaining: 15

Email Message

Enter Message

- Recipients ca
- mobile device
- Incomplete er
- send date
- Recipients ar
- expires
- Comments ar
- Senders mus

Master's (MA/MS) Final Report - Plan II Exam - combined

Message to All Recipients **Advanced Op**

Custom email and language for each recipient

Email Subject *

- Plan II Exam - RS83 A12345678 `[[Student_UserName]]`

Characters remaining: 0

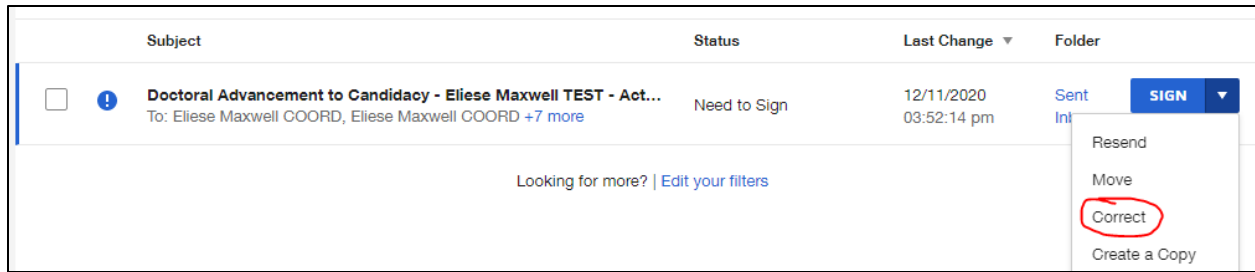
Email Message

Enter Message

- Recipients ca
- mobile device
- Incomplete er
- send date
- Recipients ar
- expires
- Comments ar
- Senders mus

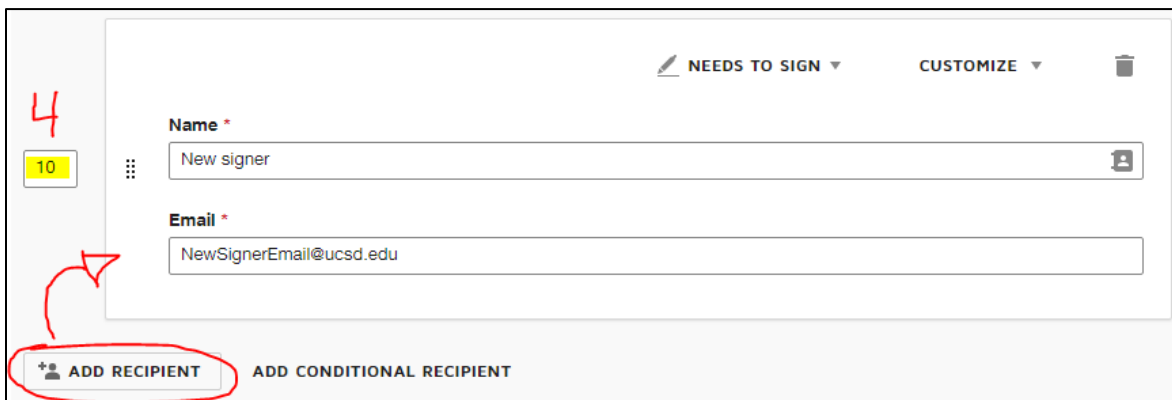
Adding a signer to a form

1. Go to the form in Docusign, click the arrow for the drop-down menu, and hit the “Correct” button. If having trouble finding it, check your Inbox and Sent folder.

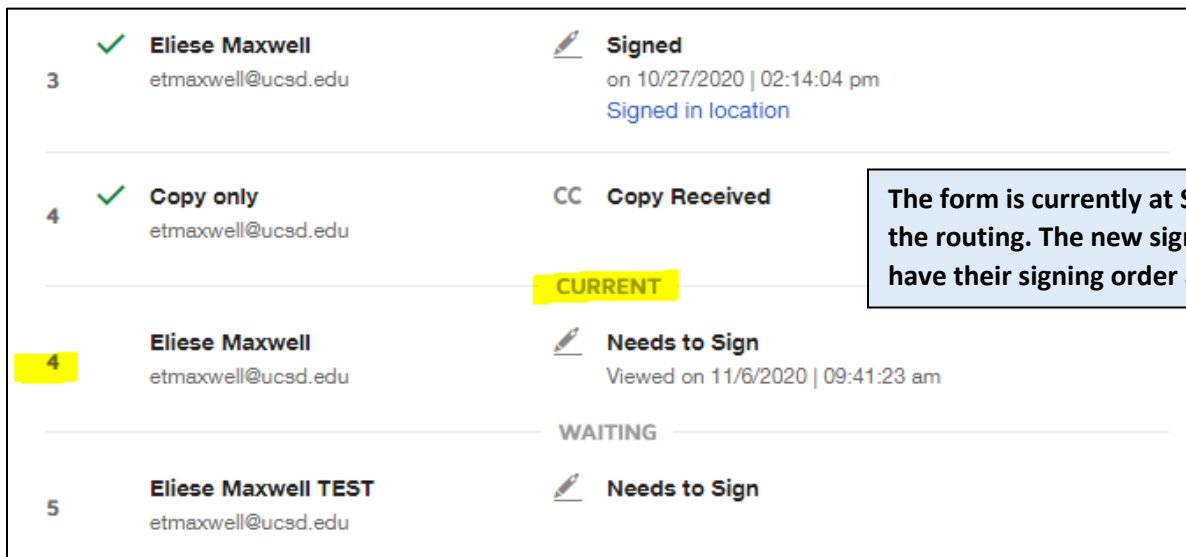


2. Scroll all the way down to the bottom of the page and hit “Add Recipient” and it will populate a new box for you to enter the new signer’s name and email. You will also need to edit the number to the left of their name. This is the signing order. Change the number to the appropriate step in the routing. This may often be the current step.

You can check which step the form is at by viewing the form and seeing where the “Current” signer is. **Note that a signer cannot be added to a step that has already been completed (all signers have a green checkmark in that step).** In this case, we can only add the signer to Step 4 or after.



The screenshot shows the "ADD RECIPIENT" form. A red "4" is written above the "10" in the order number field. The "Name" field contains "New signer" and the "Email" field contains "NewSignerEmail@ucsd.edu". The "ADD RECIPIENT" button is circled in red.



The screenshot shows the routing table with the following entries:

Order	Signer	Status	Details
3	Eliese Maxwell etmaxwell@ucsd.edu	Signed	on 10/27/2020 02:14:04 pm Signed in location
4	Copy only etmaxwell@ucsd.edu	CC Copy Received	
		CURRENT	
4	Eliese Maxwell etmaxwell@ucsd.edu	Needs to Sign	Viewed on 11/6/2020 09:41:23 am
		WAITING	
5	Eliese Maxwell TEST etmaxwell@ucsd.edu	Needs to Sign	

The form is currently at Step 4 in the routing. The new signer will have their signing order as “4”.

- Hit "Next" once you have entered the name and email. You will be brought to a page that looks just like the form. It will have colorful boxes that indicate where other signers will sign.

GRADUATE PROGRAM

Name: Eliese (Name on diploma will appear exactly as it is listed on UCSD Academic Records) PID#: 12354563

Is student eligible for CPhil degree? Yes No

If yes, CPhil diploma will be mailed to the permanent address on record in Tritonlink

Department/ Group/School: Grad Division

Major Code: GD

Degree Aim: Ph.D. D.M.A.

TO THE DEAN OF THE GRADUATE DIVISION:
 The members of the Doctoral Committee report that the candidate has completed all pre-dissertation requirements in the major and has taken the qualifying exam on: 10/27/2020
Date

Approved of Qualifications	Committee Names	Signatures of Committee Members
Yes	<u>Eliese Maxwell</u>	<u>Eliese Maxwell</u> , Chair/Co-Chair
_____	_____	_____ Member
_____	_____	_____ Member
_____	_____	_____ Member
_____	_____	_____ Member
_____	_____	_____ Member
_____	_____	_____ Member

The Committee recommends advancement to candidacy for the Doctoral degree in:

Test (Give exact title of degree.)

Approved: _____ 08/11/2021
Chair of Department/Group/School Date

ASSESSED FEE The candidacy fee will be charged to the student's TritonLink account.

STUDENT I request advancement to candidacy. I estimate I will defend my dissertation by: Text Quarter/Year Signature: _____ Date Signed
Student Date

One way to add the new signer's boxes is copying and pasting the boxes from another signer. Otherwise you can add the boxes manually with the fields to the left. We will be adding "Text", "Name", and "Signature".

You will then need to change the color of the box to match the color of the new signer. Click on the box, then look at the right-hand side for the Recipient section. Click on the name to see a dropdown of all current and future signers.

Note: if you do not add the signatures boxes, then the signer will not have any place to put their signature. The form will be blank.

University of California San Diego
La Jolla, CA 92093-0003

UNIVERSITY OF CALIFORNIA SAN DIEGO

ADVANCEMENT TO CANDIDACY FOR THE DOCTORAL DEGREE

Signature

DS Initial

Date Signed

Name

Email

Company

Title

T Text

Checkbox

Dropdown

GRADUATE PROGRAM

Name: ELiese
(When an applicant appears as only an initial on UCSD Academic Records)

Is student eligible for CPhil degree? Yes
 No

If yes, CPhil diploma will be mailed to the **permanent** address on record in Tritonlink

PID#: 12354563

Department/
Group/School: Grad Division

Major Code: GD

Degree Aim: Ph.D.
 D.M.A.

TO THE DEAN OF THE GRADUATE DIVISION:
The members of the Doctoral Committee report that the candidate has completed all pre-dissertation requirements in the major and has taken the qualifying exam on: 10/27/2020
Date

Approved of Qualifications

Yes

Committee Names

Eliese Maxwell

Signatures of Committee Members

Eliese Maxwell, Chair/Co-Chair

Text **Full Name** **Sign**

Member

Member

Graduate Division
University of California San Diego
La Jolla, CA 92093-0003

UNIVERSITY OF CALIFORNIA SAN DIEGO

REPORT OF THE QUALIFYING EXAMINATION AND ADVANCEMENT TO CANDIDACY FOR THE DOCTORAL DEGREE

GRADUATE PROGRAM

Name: ELiese
(When an applicant appears as only an initial on UCSD Academic Records)

Is student eligible for CPhil degree? Yes
 No

If yes, CPhil diploma will be mailed to the **permanent** address on record in Tritonlink

PID#: 12354563

Department/
Group/School: Grad Division

Major Code: GD

Degree Aim: Ph.D.
 D.M.A.

TO THE DEAN OF THE GRADUATE DIVISION:
The members of the Doctoral Committee report that the candidate has completed all pre-dissertation requirements in the major and has taken the qualifying exam on: 10/27/2020
Date

Approved of Qualifications

Yes

Committee Names

Eliese Maxwell

Signatures of Committee Members

Eliese Maxwell, Chair/Co-Chair

Text **Full Name** **Sign**

Member

Member

Recipient

- Eliese Maxwell
- Eliese Maxwell
- New signer**
- Eliese Maxwell TEST
- James Antony
- Registrar - Academic Records

Tooltip

Location

- Once the signer's boxes have been added and the colors changed, hit the yellow "Correct" button. This will update the form and the routing list. An email will be sent if any signers were added to the current step.