

## DocuSign Forms Quick Guide

### Contents

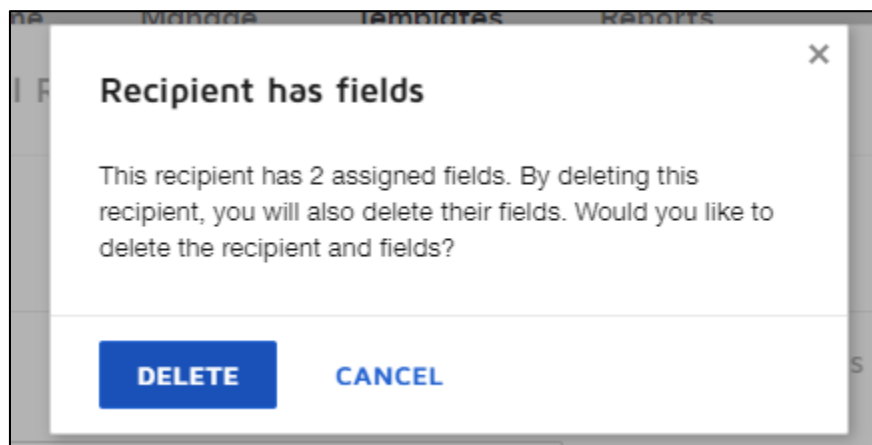
- Accessing and Initiating DocuSign Forms
- Signing a Form
- Managing Active Forms

## Accessing and Initiating DocuSign Forms

1. Go to <https://docusign.ucsd.edu> (for more info on DocuSign, go to <https://blink.ucsd.edu/go/docusign>)
2. From the homepage, click on the “Templates” tab at the top of the page
3. On the left side of the page, click on the 3<sup>rd</sup> header, “SHARED FOLDERS,” to expand it, and then click on the folder, “Graduate Division.” This brings up all the Graduate Division templates for the various forms.
4. To begin the routing process, identify which form you need and click on the blue “USE” button all the way to the right of the form name
5. This brings up a Recipients form/list to enter the names and email addresses (active directory/institutional email address) of the recipients of the form, beginning with the coordinator, and followed by the appropriate faculty members.
  - You will need to delete recipient fields that are not applicable. For example, on doctoral forms there are fields for up to 7 committee members so you will need to delete any extra fields by clicking on the **X** to the right of text box.
  - Likewise, if the faculty advisor field is not applicable on master’s degree forms you must delete that field.
  - See below for how to delete the field and the message that will pop up. You need to confirm the delete by choosing the blue “DELETE” button.



The screenshot shows a recipient entry for "Committee Member 6". It includes a "Name" field with a lock icon and an "Email" field. To the right of the fields is a circular button with an "X" inside. A red arrow points to this button. At the top right of the form, there are icons for "NEEDS TO SIGN" and "MORE".



The screenshot shows a confirmation dialog box titled "Recipient has fields". The text inside reads: "This recipient has 2 assigned fields. By deleting this recipient, you will also delete their fields. Would you like to delete the recipient and fields?". At the bottom, there are two buttons: "DELETE" (in a blue box) and "CANCEL".

6. At the bottom of the Recipients form, you will see this default “Email Subject” line:  
“**Doctoral Final Report - [[Student\_UserName]] - Action Required**”
  - Please modify the subject to add the student’s *major code* and *PID* (eg: Doctoral Final Report – **AN75 A23456789** Student Name – Action Required)
  - This will assist program staff and the Grad Division in organizing forms
7. You may enter a custom email message if desired, otherwise the default message will be sent.
  - Please note that the default message can be confusing for students as it says, “Please DocuSign [the form]” and students think they need to sign. However, there are only 2 forms that students sign: General Petition; Doctoral Advancement Form. You may want to forewarn students that they are copied on these messages for their information only.
8. Click the blue “SEND” button at the bottom of the page. The form can be filled out immediately via the pop-up box with the “Sign Now” button.
  - Alternatively, a link to the form is emailed to the coordinator, providing access to the form. That link can be used instead of the “Sign Now” button.
  - Or, the coordinator can access the form by going to the DocuSign *Inbox* or *Action Required* tab.
  - Click on the blue “SIGN” button on the right side of the page.
9. Check “I agree to use electronic records and signatures” and *Continue* to enter the student’s information.
10. Enter information in all fields highlighted by a red border. Hit *Finish* when you are finished. The form will be routed to the next person/s for signatures. A link to the form will be emailed to you for your records.
11. If you hit *Finish Later* to continue filling out the form at a later time, the form will appear in your *Action Required* or *Inbox*.

# Filling out an academic degree form

DocuSign Envelope ID: C6A0FE9C-12D0-49B8-9E82-113A48B1A29E

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



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

### ◆ GRADUATE PROGRAM

Name: John Smith

(Name on diploma will appear exactly as it is listed on UCSD Academic Records)

PID#: A1234567

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: Anthropology

Major Code: AN75

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: 05/06/2020

Date

Approved  
of Qualifications

Committee Names

Signatures of Committee Members

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Committee Chair

Committee Member

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

\_\_\_\_\_, Chair/Co-Chair

Member ▾  
Member ▾  
Member ▾  
Member ▾  
Member ▾  
Member ▾

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

Required

Anthropology

(Give exact title of degree.)

Approved: \_\_\_\_\_

Chair of Department/Group/School

Date

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

## Filling out a professional degree cover sheet

Professional degree cover sheets must be filled out and submitted with the uAchieve final degree audit form attached as a PDF.

View the documents below. FINISH OTHER ACTIONS ▾


DocuSign Envelope ID: 6B3E7957-8800-4168-8305-2CEB7A716BD8

**Final Degree Audit Cover Page**

**START**

Student PID  Student Name

Major Code

Attach Degree Audit & other petitions  Department Notes

Language Exam Requirement  Yes  No

Language Exam  passed on

Language Examiner \_\_\_\_\_

Program Director/Assoc Dean Approval \_\_\_\_\_

Graduate Division Notes \_\_\_\_\_

Graduate Division Approval \_\_\_\_\_

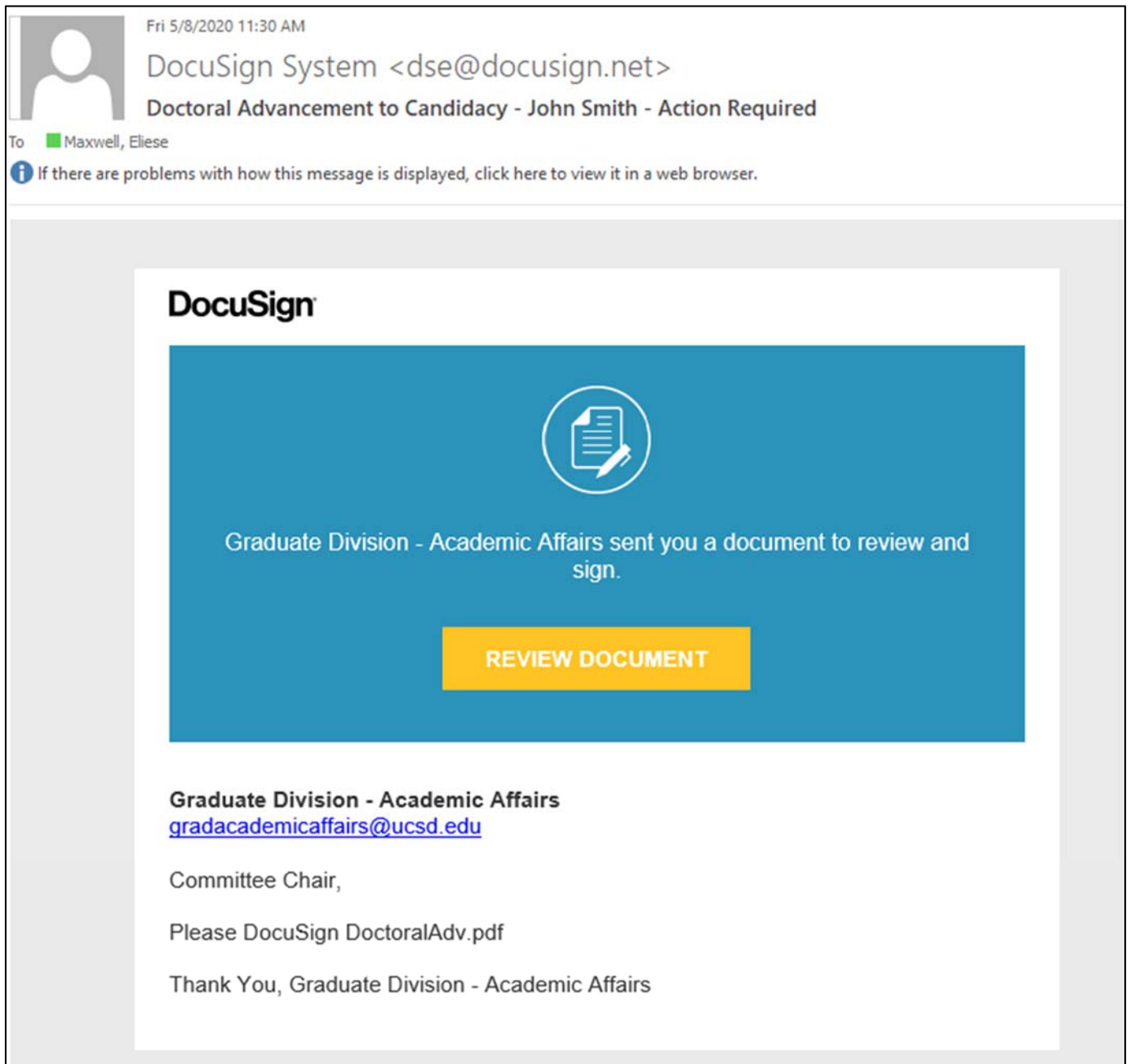
Registrar Notes \_\_\_\_\_

Registrar Approval \_\_\_\_\_

DocuSign Change Language - English (US) ▾ Terms Of Use & Privacy ▾ Copyright © 2020 DocuSign Inc. | V2R


## Signing a Form


1. Designated document signers will receive an email with a link to the document.
  - Please note that the link provided in the email notification message expires quickly - after 5 clicks or 48 hours (This is for security purposes). However, the first time you or your faculty member click on an expired link it will **auto send** a new email notification and present a page stating that the link has expired and that a new notification has been sent. (For additional information see #s 2, 6, 7 on our [DocuSign tips page here.](#))
2. Click on *Review Document* button in the email message to begin signing the form.



Fri 5/8/2020 11:30 AM



**DocuSign System** <dse@docusign.net>  
**Doctoral Advancement to Candidacy - John Smith - Action Required**

To:  Maxwell, Eliese

 If there are problems with how this message is displayed, click here to view it in a web browser.

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**DocuSign**

  
  
Graduate Division - Academic Affairs sent you a document to review and sign.  
**REVIEW DOCUMENT**

**Graduate Division - Academic Affairs**  
[gradacademicaffairs@ucsd.edu](mailto:gradacademicaffairs@ucsd.edu)

Committee Chair,

Please DocuSign DoctoralAdv.pdf

Thank You, Graduate Division - Academic Affairs


- The signee will be shown all the fields that can be edited. Boxes with a red background are fields that have already been entered. Any boxes highlighted in red are required of the signee. Once they finish signing, they press *Finish*.

*Note: for forms with committee members, all members will receive the form at the same time. The form will route to the next signee once they all finish signing*

START

DocuSign Envelope ID: C6A0FE9C-12D0-49B8-9E82-113A48B1A29E

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



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

---

**◆ GRADUATE PROGRAM**

Name: John Smith (Name on diploma will appear exactly as it is listed on UCSD Academic Records) PID#: A1234567

Is student eligible for CPhil degree?  Yes  No Department/  
Group/School: Anthropology

If yes, CPhil diploma will be mailed to the **permanent** address on record in Tritonlink Major Code: AN75

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: 05/06/2020

Date

Approved  
of Qualifications

-- select --

Committee Names

\_\_\_\_\_ Committee Chair

\_\_\_\_\_ Committee Member

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Signatures of Committee Members

Sign

\_\_\_\_\_, Chair/Co-Chair

Member ▼

Member ▼

Member ▼

Member ▼

Member ▼

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

Anthropology (Give exact title of degree.)

Approved: \_\_\_\_\_

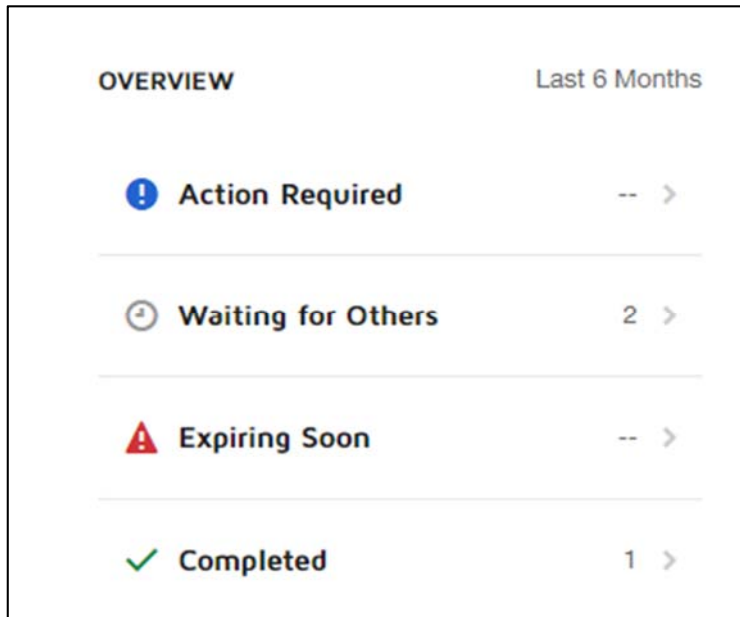
Chair of Department/Group/School





Date

- The student will receive a copy once the committee members and department chair have signed off. The form will automatically update once Graduate Division and the Registrar's Office has signed off.
- Once the Registrar's Office has signed off, a copy will be sent to the graduate/program coordinator, all signing recipients, and to Graduate Division.

## Managing Active Forms

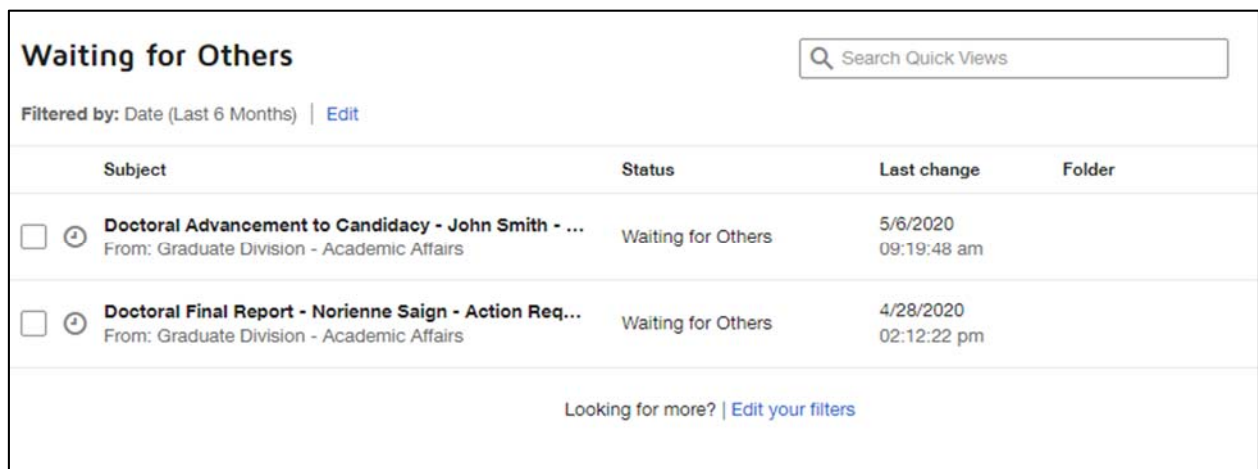
1. To check on in progress forms, go to <https://docusign.ucsd.edu> and sign on with Single Sign On.
2. The “Overview” section on the left-hand side shows you all the forms you’ve initiated and their progress. Forms that you initiated and sent for signatures will appear under *Waiting for Others*, or in your *Inbox*.





OVERVIEW	Last 6 Months
 <b>Action Required</b>	-- >
 <b>Waiting for Others</b>	2 >
 <b>Expiring Soon</b>	-- >
 <b>Completed</b>	1 >

3. Going into one of the categories will show you all the forms and where they are in routing. You can search for a specific form or student in the “Search Quick Views” bar.

*Note: By modifying the email subject line to include the student PID (described in Accessing DocuSign, step 7), you can search by PID or by student name.*



Waiting for Others		Search Quick Views	
Filtered by: Date (Last 6 Months)   <a href="#">Edit</a>			
Subject	Status	Last change	Folder
<input type="checkbox"/>  <b>Doctoral Advancement to Candidacy - John Smith - ...</b> From: Graduate Division - Academic Affairs	Waiting for Others	5/6/2020 09:19:48 am	
<input type="checkbox"/>  <b>Doctoral Final Report - Norienne Saign - Action Req...</b> From: Graduate Division - Academic Affairs	Waiting for Others	4/28/2020 02:12:22 pm	

Looking for more? | [Edit your filters](#)



- Clicking on a form will show you more details on where the form currently is in routing. If an email address of one of the recipients needs to be changed, the form can be edited via the “CORRECT” button. Only email addresses of those who have not yet signed can be changed.

### Doctoral Advancement to Candidacy - John Smith - Action Required ⓘ

Last change on 6/16/2020 | 04:34:58 pm  
Sent on 6/16/2020 | 04:09:27 pm

**Need to Sign**

SIGN
RESEND
MOVE
CORRECT
MORE ▾

#### Recipients

COMPLETED		
1	<div style="display: flex; align-items: center;"> <span style="color: green; font-size: 1.2em; margin-right: 5px;">✓</span> <div> <p style="margin: 0;"><b>Eliese Maxwell</b></p> <p style="margin: 0; font-size: 0.8em;">etmaxwell@ucsd.edu</p> </div> </div>	<div style="display: flex; align-items: center;"> <span style="font-size: 1.2em; margin-right: 5px;">✍</span> <p style="margin: 0;"><b>Signed</b></p> <p style="margin: 0; font-size: 0.8em;">on 6/16/2020   04:34:56 pm</p> <p style="margin: 0; font-size: 0.8em; color: blue;">Signed in location</p> </div>
2	<div style="display: flex; align-items: center;"> <span style="color: green; font-size: 1.2em; margin-right: 5px;">✓</span> <div> <p style="margin: 0;"><b>Eliese Maxwell</b></p> <p style="margin: 0; font-size: 0.8em;">etmaxwell@ucsd.edu</p> </div> </div>	<div style="display: flex; align-items: center;"> <span style="font-size: 1.2em; margin-right: 5px;">CC</span> <p style="margin: 0;"><b>Copy Received</b></p> </div>
CURRENT		
3	<div style="display: flex; align-items: center;"> <div> <p style="margin: 0;"><b>Committee Chair</b></p> <p style="margin: 0; font-size: 0.8em;">etmaxwell@ucsd.edu</p> </div> </div>	<div style="display: flex; align-items: center;"> <span style="font-size: 1.2em; margin-right: 5px;">✍</span> <p style="margin: 0;"><b>Needs to Sign</b></p> </div>
WAITING		
4	<div style="display: flex; align-items: center;"> <div> <p style="margin: 0;"><b>Department Chair</b></p> <p style="margin: 0; font-size: 0.8em;">etmaxwell@ucsd.edu</p> </div> </div>	<div style="display: flex; align-items: center;"> <span style="font-size: 1.2em; margin-right: 5px;">✍</span> <p style="margin: 0;"><b>Needs to Sign</b></p> </div>
5	<div style="display: flex; align-items: center;"> <div> <p style="margin: 0;"><b>John Smith</b></p> <p style="margin: 0; font-size: 0.8em;">etmaxwell@ucsd.edu</p> </div> </div>	<div style="display: flex; align-items: center;"> <span style="font-size: 1.2em; margin-right: 5px;">✍</span> <p style="margin: 0;"><b>Needs to Sign</b></p> </div>
6	<div style="display: flex; align-items: center;"> <div> <p style="margin: 0;"><b>James Antony</b></p> <p style="margin: 0; font-size: 0.8em;">gradacademicaffairs@ucsd.edu</p> </div> </div>	<div style="display: flex; align-items: center;"> <span style="font-size: 1.2em; margin-right: 5px;">✍</span> <p style="margin: 0;"><b>Needs to Sign</b></p> </div>
7	<div style="display: flex; align-items: center;"> <div> <p style="margin: 0;"><b>Registrar - Academic Records</b></p> <p style="margin: 0; font-size: 0.8em; color: blue;">Signing Group</p> </div> </div>	<div style="display: flex; align-items: center;"> <span style="font-size: 1.2em; margin-right: 5px;">✍</span> <p style="margin: 0;"><b>Needs to Sign</b></p> </div>
8	<div style="display: flex; align-items: center;"> <div> <p style="margin: 0;"><b>James Antony</b></p> <p style="margin: 0; font-size: 0.8em;">gradacademicaffairs@ucsd.edu</p> </div> </div>	<div style="display: flex; align-items: center;"> <span style="font-size: 1.2em; margin-right: 5px;">CC</span> <p style="margin: 0;"><b>Receives a Copy</b></p> </div>
9	<div style="display: flex; align-items: center;"> <div> <p style="margin: 0;"><b>John Smith</b></p> <p style="margin: 0; font-size: 0.8em;">etmaxwell@ucsd.edu</p> </div> </div>	<div style="display: flex; align-items: center;"> <span style="font-size: 1.2em; margin-right: 5px;">CC</span> <p style="margin: 0;"><b>Receives a Copy</b></p> </div>

- To resend a form, click on the “RESEND” button to the right of the form name or in the form details. It will resend to all parties whose signatures are pending.

### Action Required

Filtered by: Date (Last 6 Months) | [Edit](#)


🔍 Search Quick Views


FILTERS


	Subject	Status	Last Change ▾	Folder
<input type="checkbox"/> <span style="color: blue; font-size: 1.2em;">!</span>	<p style="margin: 0;"><b>Doctoral Advancement to Candidacy - John Smith</b></p> <p style="margin: 0; font-size: 0.8em; color: blue;">To: Eliese Maxwell, Eliese Maxwell +7 more</p>	Need to Sign	<p style="margin: 0; font-size: 0.8em;">6/16/2020</p> <p style="margin: 0; font-size: 0.8em;">04:34:58 pm</p>	<div style="display: flex; gap: 5px; font-size: 0.8em;"> <span style="border: 1px solid #ccc; padding: 2px 5px;">Sent</span> <span style="border: 1px solid #ccc; padding: 2px 5px;">Inbox</span> <span style="background-color: #0070c0; color: white; padding: 2px 5px; border-radius: 3px;">SIGN</span> <span style="font-size: 0.8em;">▾</span> </div> <div style="border: 1px solid #ccc; padding: 2px 5px; margin-top: 2px; font-size: 0.8em;">Resend</div>

6. Once the Registrar has signed off, you will receive an email letting you know the form has been completed. You can also see all of your completed forms on the DocuSign website.

Fri 5/8/2020 11:54 AM


 DocuSign System <dse@docusign.net>  
Completed: Doctoral Advancement to Candidacy - John Smith - Action Required

To:  Maxwell, Elise

 If there are problems with how this message is displayed, click here to view it in a web browser.

---

**DocuSign**



Your document has been completed

[VIEW COMPLETED DOCUMENT](#)

**Graduate Division - Academic Affairs**  
[gradacademicaffairs@ucsd.edu](mailto:gradacademicaffairs@ucsd.edu)

All parties have completed Doctoral Advancement to Candidacy - John Smith - Action Required.

Please Note: The envelope was completed with markup. All marked changes were initialed by all signing parties.

Preview of the completed form:

DocuSign Envelope ID: C6A0FE9C-12D0-49B8-9E82-113A48B1A29E

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



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

◆ GRADUATE PROGRAM

Name: John Smith PID#: A1234567  
(Name on diploma will appear exactly as it is listed on UCSD Academic Records)

Is student eligible for CPhil degree?  Yes  
 No  
Department/ Group/School: Anthropology

If yes, CPhil diploma will be mailed to the **permanent** address on record in Tritonlink  
Major Code: AN75  
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: 05/06/2020  
Date

Approved of Qualifications	Committee Names	Signatures of Committee Members	
Yes	Committee Chair	<u>[Signature]</u>	Chair/Co-Chair
Yes	Committee Member	<u>[Signature]</u>	Member
			Member
			Member
			Member
			Member
			Member

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

Anthropology  
(Give exact title of degree)  
Approved: [Signature] 05/08/2020  
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: SP21  
Quarter/Year Signature: [Signature] 5/8/2020  
Student Date

◆ GRADUATE DIVISION Advancement to candidacy  
SP20 Approved: [Signature] EM 05/08/2020  
Quarter/Year Dean of the Graduate Division Date

◆ REGISTRAR Approved: [Signature] 5/8/2020  
Registrar Date