

UC San Diego

GRADUATE DIVISION

DocuSign Forms Quick Guide

Contents

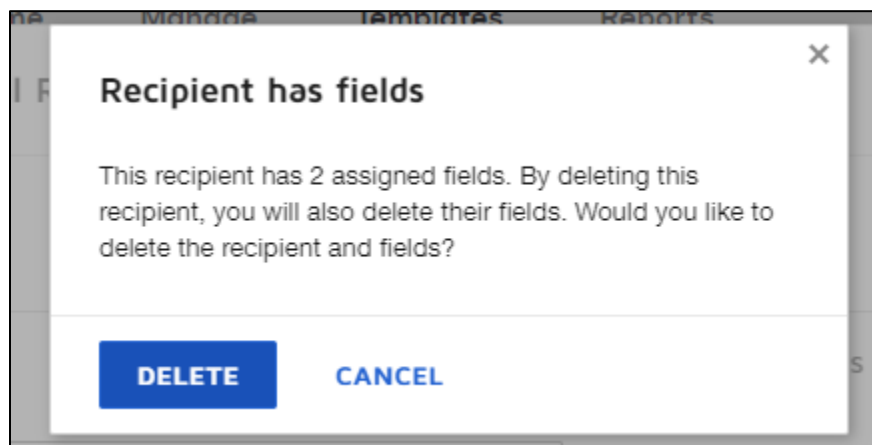
- Accessing and Initiating DocuSign Forms
- Signing a Form
- Managing Active Forms

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 dropdown arrow next to the 3rd 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 form titled "Committee Member 6". It includes a "Name" field and an "Email" field, both with asterisks indicating they are required. To the right of the form, there is a "NEEDS TO SIGN" status and a "MORE" dropdown menu. A red arrow points to a small "X" icon on the right side of the form, which is used to delete the recipient.



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 of the dialog, there are two buttons: "DELETE" (in blue) 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

<u>Approved of Qualifications</u>	<u>Committee Names</u>	<u>Signatures of Committee Members</u>	<u>Chair/Co-Chair</u>
_____	<u>Committee Chair</u>	_____	_____
_____	<u>Committee Member</u>	_____	<u>Member</u> ▼
_____	_____	_____	<u>Member</u> ▼
_____	_____	_____	<u>Member</u> ▼
_____	_____	_____	<u>Member</u> ▼
_____	_____	_____	<u>Member</u> ▼
_____	_____	_____	<u>Member</u> ▼

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

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 _____

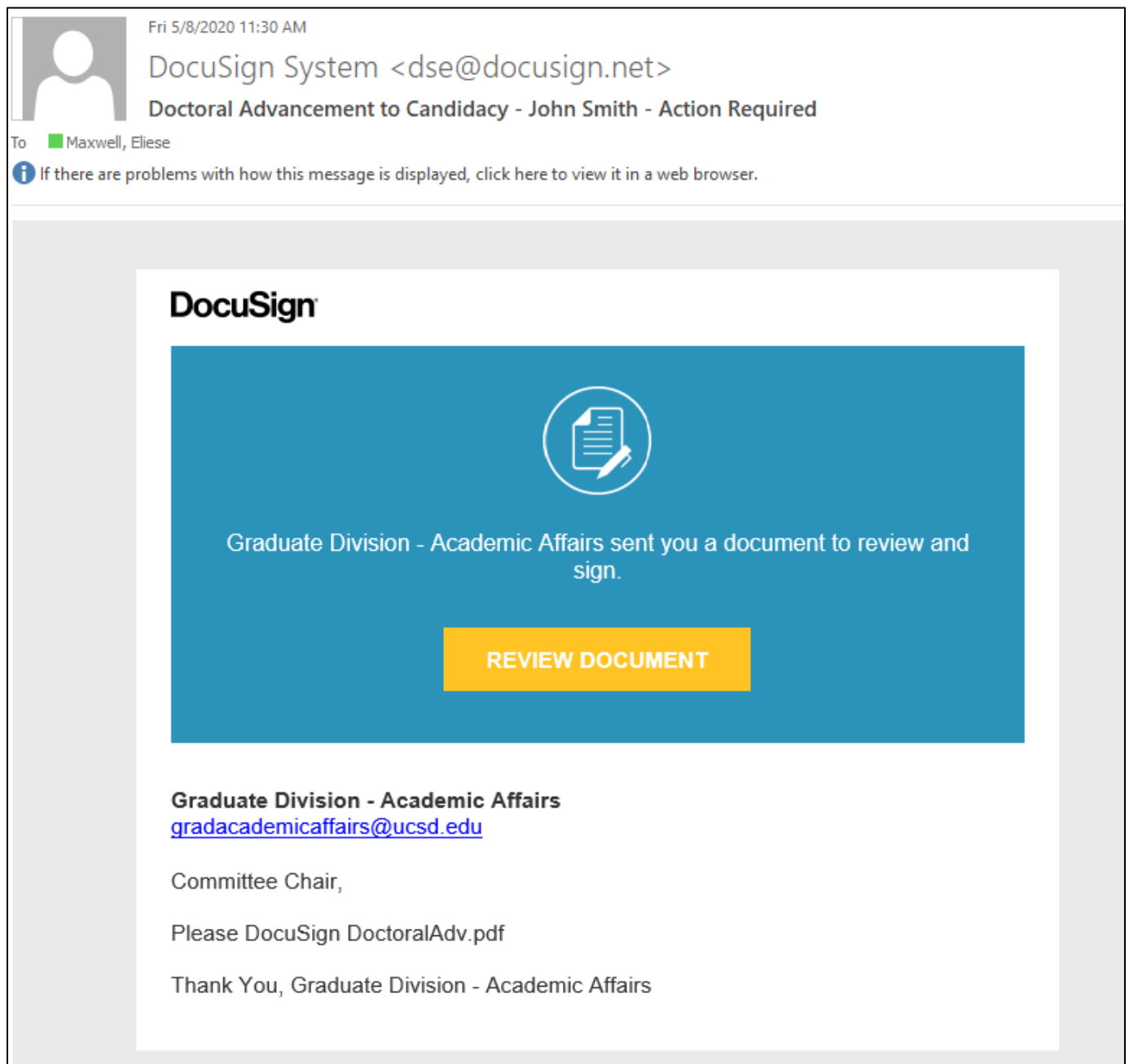
Registrar Notes

Registrar Approval _____

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

Signing a Form

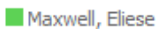
1. Designated document signers will receive an email with a link to the document.
 - Please note that the link provided in the email notification message expires quickly - after 5 clicks or 48 hours (This is for security purposes). However, the first time you or your faculty member click on an expired 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.




The image shows an email interface. At the top left is a placeholder for a profile picture. To its right, the sender is identified as 'DocuSign System <dse@docusign.net>' with the subject 'Doctoral Advancement to Candidacy - John Smith - Action Required'. The recipient is 'Maxwell, Eliese'. A link is provided for viewing the message in a web browser. The main content is a DocuSign notification card with a blue background and a white icon of a document with a pen. The text on the card reads: 'Graduate Division - Academic Affairs sent you a document to review and sign.' Below this is a prominent yellow button labeled 'REVIEW DOCUMENT'. At the bottom of the card, the sender is identified as 'Graduate Division - Academic Affairs' with the email address 'gradacademicaffairs@ucsd.edu'. The card also includes the text 'Committee Chair, Please DocuSign DoctoralAdv.pdf Thank You, Graduate Division - Academic Affairs'.


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.

DocuSign



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

REVIEW DOCUMENT

Graduate Division - Academic Affairs
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)

Is student eligible for CPhil degree? Yes No

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

PID#: A1234567

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
-- select --	Committee Chair	<div style="display: flex; align-items: center;"> <div style="background-color: yellow; padding: 2px; margin-right: 5px;">Sign</div> <div style="border-bottom: 1px solid black; flex-grow: 1;"></div> <div style="margin-left: 5px;">Chair/Co-Chair</div> </div>
	Committee Member	<div style="display: flex; align-items: center;"> <div style="border-bottom: 1px solid black; flex-grow: 1;"></div> <div style="margin-left: 5px;">Member</div> </div>
		<div style="display: flex; align-items: center;"> <div style="border-bottom: 1px solid black; flex-grow: 1;"></div> <div style="margin-left: 5px;">Member</div> </div>
		<div style="display: flex; align-items: center;"> <div style="border-bottom: 1px solid black; flex-grow: 1;"></div> <div style="margin-left: 5px;">Member</div> </div>
		<div style="display: flex; align-items: center;"> <div style="border-bottom: 1px solid black; flex-grow: 1;"></div> <div style="margin-left: 5px;">Member</div> </div>
		<div style="display: flex; align-items: center;"> <div style="border-bottom: 1px solid black; flex-grow: 1;"></div> <div style="margin-left: 5px;">Member</div> </div>

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



-  **Action Required** -- >
-  **Waiting for Others** 2 >
-  **Expiring Soon** -- >
-  **Completed** 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

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

Subject	Status	Last change	Folder
<input type="checkbox"/>  Doctoral Advancement to Candidacy - John Smith - ... From: Graduate Division - Academic Affairs	Waiting for Others	5/6/2020 09:19:48 am	
<input type="checkbox"/>  Doctoral Final Report - Norienne Saign - Action Req... 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	✓ Eliese Maxwell etmaxwell@ucsd.edu	✍ Signed on 6/16/2020 04:34:56 pm Signed in location
2	✓ Eliese Maxwell etmaxwell@ucsd.edu	CC Copy Received
CURRENT		
3	Committee Chair etmaxwell@ucsd.edu	✍ Needs to Sign
WAITING		
4	Department Chair etmaxwell@ucsd.edu	✍ Needs to Sign
5	John Smith etmaxwell@ucsd.edu	✍ Needs to Sign
6	James Antony gradacademicaffairs@ucsd.edu	✍ Needs to Sign
7	Registrar - Academic Records Signing Group	✍ Needs to Sign
8	James Antony gradacademicaffairs@ucsd.edu	CC Receives a Copy
9	John Smith etmaxwell@ucsd.edu	CC Receives a Copy

- 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


FILTERS


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


	Subject	Status	Last Change ▾	Folder
<input type="checkbox"/>	! Doctoral Advancement to Candidacy - John Smith To: Eliese Maxwell, Eliese Maxwell +7 more	Need to Sign	6/16/2020 04:34:58 pm	Sent Inbox SIGN ▾
				Resend

- 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, Eliese

 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

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
(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

Major Code: AN75

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

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

DocuSigned by:
Committee Chair, Chair/Co-Chair

Yes

Committee Member

DocuSigned by:
Committee Member Member

_____ Member

_____ Member

_____ Member

_____ Member

_____ Member

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

Anthropology
(Give exact title of degree.)

Approved: DocuSigned by:
Department Chair 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: DocuSigned by:
John Smith 5/8/2020
Student Date

◆ GRADUATE DIVISION Advancement to candidacy

SP20 Approved: DocuSigned by: EM 05/08/2020
Quarter/Year Dean of the Graduate Division Date

◆ REGISTRAR

Approved: DocuSigned by:
Registrar 5/8/2020
Registrar Date