DocuSign Workshop

September 22, 2020
Need for the Changes
Decision to Use DocuSign

Texas A&M University

Rutgers University Graduate School | Newark

Georgia Tech Graduate Studies

University of Nevada, Reno

The University of Texas at Austin Graduate School

Virginia Commonwealth University
Process

1. Background Research and Workflow Identification
2. Testing
3. Focus Group w/ Engineering, Liberal Arts, and Science
4. Modifications and More Testing
5. Feedback from GPS Staff
6. Modifications and More Testing
7. Implement on August 14, 2020
8. Engagement w/ DocuSign, Modifications, & More Testing
9. Add Student to Workflow, August 18, 2020
Using DocuSign

With feedback from the Texas A&M community, OAPPS has developed workflow processes for each form:

- The Initiator (either student or Graduate Program Assistant, depending on the form) starts the form and completes the requested information.
- If you are in the Workflow, you will receive an email to your TAMU email account. Once you receive an email, respond to the prompt, provide your initials or signature (whichever is requested), and then continue.
- You can view the status of the form by signing into DocuSign using your TAMU email. See the overview video and steps for more information.
- DocuSign has a virtual Support Center. You can watch a video to learn more about signing documents. There are also step-by-step instructions related to sending and signing documents and other basic information.
- You may also visit the OAPPS DocuSign Form FAQs page to view additional documentation, "How-To" videos, and answers to common questions.
- If you have additional questions or comments:
Using DocuSign

**Written Thesis Approval Form**

- **Initiator:** Student
- **Directions:** Students should initiate this form. Before proceeding, you must identify the name and TAMU email for the (1) Graduate Program Assistant in your department, (2) your committee chair, (3) your committee members, and (4) the Department Head or Intercollegiate Faculty Chair (or their designee). Complete all information applicable information, click “Begin Signing,” and complete all requested fields on the form.
- If you require assistance entering the requested information, please contact your Graduate Program Assistant.
Using DocuSign

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- If you require assistance entering the requested information, please contact your Graduate Program Assistant.
Using DocuSign

PowerForm Signer Information

Student
Your Name: *
George Student
Your Email: *
gs Cunningham@tamu.edu

Graduate Program Assistant
Name: *
Program Assistant
Email: *
departmental@tamu.edu

Committee Chair
Name: *
Committee Chair
Email: *
committeechair@tamu.edu

Department Head OR Intercollegiate Faculty Chair
Name: *
Department Head
Email: *
departmenthead@tamu.edu
Using DocuSign
Using DocuSign

Save a Copy of Your Document

Your document has been signed
If you would like a copy for your records, select Download or Print and save.

DOWNLOAD  PRINT  CLOSE
Checking the Form
Checking the Form
Complete!
Checking the Status

Please log in to your account

Email address

CONTINUE

No account? Sign up for free
Checking the Status: Use Company Login

Click the blue rectangle to login using your TAMU credentials.
Checking the Status: NetID and Password
Checking the Status: DocuSign Home Page

Overview of Documents
Checking the Status: Viewing the Documents

Click on the Document
Review the Status

Can still update the emails among people who have not signed.

Review the Documents

Waiting on the Committee Chair to sign.
Checking the Status: Using the App

- Open Forms
- Completed Forms

DocuSign App Screenshot:
- 4 forms waiting for others
- Recent Activity:
  - DocuSign: Request and Announcement (9/17/20)
  - Signature Required: Written Th...
  - Signature Required: Research...
  - Signature Required: Letter of In...

Images and graphics are not provided in this format.
Checking the Status: Using the App

<table>
<thead>
<tr>
<th>Recipients</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>George Student</td>
</tr>
<tr>
<td></td>
<td>Signed Sep 21, 2020 at 1:46 PM</td>
</tr>
<tr>
<td>1</td>
<td>George Student</td>
</tr>
<tr>
<td></td>
<td>Received a Copy</td>
</tr>
<tr>
<td>2</td>
<td>Program Assistant</td>
</tr>
<tr>
<td></td>
<td><a href="mailto:deptemail@tamu.edu">deptemail@tamu.edu</a></td>
</tr>
<tr>
<td></td>
<td>Manage Recipients</td>
</tr>
<tr>
<td>3</td>
<td>Program Assistant</td>
</tr>
<tr>
<td></td>
<td><a href="mailto:deptemail@tamu.edu">deptemail@tamu.edu</a></td>
</tr>
<tr>
<td></td>
<td>Needs to Sign</td>
</tr>
<tr>
<td>4</td>
<td>Committee Chair</td>
</tr>
<tr>
<td></td>
<td><a href="mailto:commchair@tamu.edu">commchair@tamu.edu</a></td>
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<tr>
<td>5</td>
<td>Committee Member</td>
</tr>
<tr>
<td></td>
<td><a href="mailto:commmember@tamu.edu">commmember@tamu.edu</a></td>
</tr>
<tr>
<td></td>
<td>Needs to Sign</td>
</tr>
</tbody>
</table>

- Shows the People Who Have Signed
- Shows the People Whose Signature is Still Pending
Common Questions: Department Email

• Our department has a common email that we use for processing graduate forms. Can we use that?

  • Yes, as long as you *do not* want to be able to check the status of the form.
  
  • If you want to be able to check the status of the form, you need to use a TAMU email associated with a NetID and password.
Common Questions: Corrections

• The student filled out some of the information incorrectly. Can I correct this?

• Yes, as long as there are still signatures in the queue.
Common Questions: Fields

• Some of the fields are not showing up. Why is this happening?

  • Only roles that the Initiator completed will show in the list for the Graduate Program Assistant to update.

  • If you want the Initiator to re-start the process, Void the form or click Decline to Sign.
Common Questions: Substitution After Routing

• The form has routed, but we need to make a substitution. Do we have to start again?

  • No need to start over. Graduate Program Assistant can make the change.
Common Questions: Substitution After Routing
Common Questions: Results Forms

• Who sends the Results forms?
  • The Records and Processing team.

• The committee chair signed the results form before the exam. What should we do?
  • Department hold until date of exam.
Other Resources

- FAQ page on Graduate and Professional Studies site.
- Videos
- Handouts
- DocuSign Support
  - Available 24/7 over the phone or chat.
Any Questions