DocuSign Workshop

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

Graduate and Professional Studies FORMS

Graduate and Professional Studies uses DocuSign for a number of forms. On this page, you can find helpful tips on how to use DocuSign, links to the forms, and instructions for each form.

DocuSign Tips

- See the step-by-step video to show how DocuSign works.

- With feedback from the Texas A&M community, GSAPS 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 check the status of the form by logging 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 documents, accessing documents you have previously signed, and other basic information.
  - You may also visit the GSAPS 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

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
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

**RESEARCH PROPOSAL APPROVAL FORM FOR THESIS, DISSERTATION, OR RESEARCH OF STUDY COMMITTEE AND DEPARTMENTAL APPROVALS**

<table>
<thead>
<tr>
<th>Name</th>
<th>UIN</th>
<th>Approved</th>
<th>Not Approved</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>George Student</td>
<td>867005309</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**STUDENT INFORMATION**

<table>
<thead>
<tr>
<th>Name</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>George Student</td>
<td>09/10/2</td>
</tr>
</tbody>
</table>
Complete!
Checking the Status

DocuSign

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

- Action Required: 1
- Waiting for Others: 0
- Expiring Soon: 0
- Completed: 2

What's New:
- Comments: Ask and answer questions about documents and receive real-time comment notifications. More Info
- Bulk Send for Multiple Recipients: Include multiple recipients in each envelope. Send to more recipient types and specify envelope custom field values. More Info
- Template Sorting: Sort your templates by name.
Checking the Status: Viewing the Documents

Click on the Document

![DocuSign eSignature interface](image-url)
Review the Status

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

Waiting on the Committee Chair to sign.

Review the Documents

DocuSign eSignature

<table>
<thead>
<tr>
<th>Recipients</th>
<th>Status</th>
<th>Signing Order</th>
</tr>
</thead>
<tbody>
<tr>
<td>George Student</td>
<td>COMPLETED</td>
<td></td>
</tr>
<tr>
<td>Signed on 9/13/2020 at 03:37:54 pm</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Signed in location</td>
<td></td>
<td></td>
</tr>
<tr>
<td>George B. Cunningham</td>
<td>COMPLETED</td>
<td></td>
</tr>
<tr>
<td>Signed on 9/12/2020 at 04:01:56 pm</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Signed in location</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Raul Graduate Program Assistant</td>
<td>CURRENT</td>
<td></td>
</tr>
<tr>
<td>Viewed on 9/12/2020 at 04:01:09 pm</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Shonda Committee Chair</td>
<td>WAITING</td>
<td></td>
</tr>
<tr>
<td>Needs to Sign</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Juanita Department Head</td>
<td>WAITING</td>
<td></td>
</tr>
<tr>
<td>Needs to Sign</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Raul Graduate Program Assistant</td>
<td>WAITING</td>
<td></td>
</tr>
<tr>
<td>Needs to Sign</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Checking the Status: Using the App

DocuSign

- Open Forms
- Completed Forms

[Image of DocuSign app interface showing recent activity and status]

- Action Required: Waiting for Others
- Completed: Request and Announcement
Checking the Status: Using the App

- 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. How 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

Enter Recipients' Information

Graduate Program Assistant
- Select Signing Group
  - Name: George GPA
  - Email: gb cunningham@tamu.edu

Private Message
- Re-Send

Committee Chair

Committee Member 1
- Select Signing Group
  - Name: Ramon Committee Member
  - Email: rcm@tamu.edu

Private Message

Enter Recipients' Information

Graduate Program Assistant
- Select Signing Group
  - Name: George GPA
  - Email: gb cunningham@tamu.edu

Private Message

Committee Chair

Committee Member 1
- Select Signing Group
  - Name: Frank Substitute for Ramon Comm
  - Email: franksub@tamu.edu

Private Message
- Ramon Committee Member was taken ill, so Frank Substitute sat in.
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