DEPOSIT REQUEST FORM – CHEAT SHEET

DocuSign | Pitt

REQUESTER Step 1 – Setup:

https://my.pitt.edu	DocuSign	Manage	Create > Envelope
My Pitt	DocuSign - Send, sign, and manage documents electronically.	**Manage**	Create / Envelope
Choose an Online Document	**Shared Templates**	**Deposit Request Form**	**Add**
Choose an Online Document	Shared Templates	☑ Deposit Request Form	Add

Step 2 – Attachments: e.g., Provost's approval.

Browse from My Computer	or Choose an Online Document (e.g., for a Box document)	Add
Browse from my Computer	Choose an Online Document	Add

Step 3 – Recipients:
1. **Requester** – fill in your name and email. 2. **Dean, Director or Campus President** - fill in recipient name and email. 3. **Senior Officer** – fill in recipient name and email, **Health Sciences only**. **All other areas should click the "x" button ⊗ to remove this signer**. Do not edit the **Provost** role.

Step 4 – Email Message and Envelope Settings:
Put a description of the form in the subject line and customize the Email Message as desired. **Do not remove the New Item Type or DocuSign Help URLs from the body of the email**. Do not edit the **Envelope Settings** section.

Step 5 – Sending the Form:
Double check that all attachments have been included. Attachments cannot be added after exiting this screen.

Next	Send	Send Anyway > Yes	Fill in highlighted fields > Finish
Next	Send	Send Anyway / Yes	FINISH

To view the form's progress, go to **DocuSign > Manage > Search Folders > Out for Signature > Summary**. You will receive an email notification when each role completes the form, and a final email with the completed document attached. If you need to cancel the form, open the form and go to **Other Actions > Void**.

DEAN, DIRECTOR or CAMPUS PRESIDENT / SENIOR OFFICER (Health Sciences only) / PROVOST:
You will receive an email stating that you have been sent a document to review and sign. Click the **Review Documents** link in the email, and click in the highlighted field on the form to sign. Click **Finish** to finalize your changes and route the document to the next recipient.

**ALL RECIPIENTS WILL RECEIVE A FINAL EMAIL WITH THE COMPLETED DOCUMENT ATTACHED.
DOUBLE-CHECK THE COMPLETED DOCUMENT FOR ANY COMMENTS OR CHANGES.**
DocuSign Support: https://support.docusign.com (DocuSign > Home > Need Help?)
"Other Actions" Guide: https://support.docusign.com/en/guides/cdse-user-guide-signing-sign-other-actions-new