FEES AND TUITION REQUEST FORM – CHEAT SHEET

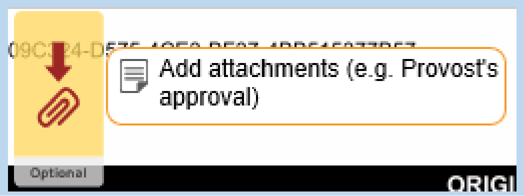
DocuSign | Pitt

REQUESTER:

Step 1 – Customize Notifications: Before sending, you may want to customize which notifications you receive. Go to my.pitt.edu > **DocuSign** > profile icon (upper right corner) > **My Preferences** > **Signing & Sending > Notifications**.

Step 2 – 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, otherwise leave blank***. Do not edit **Provost, Student Financial Services**, or **Registrar,** they are set to pre-populated Account Signing Groups.

Step 3 – Attachments: Add attachments (e.g., **Provost's approval**) by clicking the tag **at the top of the form**. After attaching, they will be visible after page two of the form. You can also attach extra pages for **Course Fee Data** or **Tuition and Other Fee Data** if needed - the form includes 16 lines for Course Fee Data and 5 lines for Tuition and Other Fee Data on page two.



Step 4 – Form Data: Complete the form fields; **required fields are highlighted in red**. Click **Finish** to finalize your changes and route the document to the next recipient. **You will not able to make any additional edits after clicking FINISH**. To view the form's progress, go to **DocuSign > Manage > Quick Views > Waiting for Others**. You will receive a final email with the completed document attached. If you need to cancel the form, open the form from the **DocuSign > Manage** screen and click **Quick Views > Waiting for Others >** right hand drop down menu **> 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.

STUDENT FINANCIAL SERVICES: 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 determine if the **Registrar** needs to receive a copy.

Registrar Copy Needed: If the Requester did not fill **Item Type 1** and/or **2** above, complete the **Item Type 1** and/or **2** fields under **Approvals > Student Financial Services**. Click the **Approve** button on the form to route the document to the Registrar.

No Registrar Copy Needed: Click **Other Actions > Correct** from the top navigation bar**.** From the **Add Recipients to the Envelope** section, **remove the Registrar role** by clicking the "x" button on that line.

Confirm by clicking **Delete**. Click **Next** to continue, and then **Correct** at the top of the next page. Go to **DocuSign** > **Search Folders** > **Awaiting My Signature** and double-click the document to open it. If the Requester did not fill **Item Type 1** and/or **2** above, complete the **Item Type 1** and/or **2** fields under **Approvals > Student Financial Services.** Click the **Approve** button.

REGISTRAR: If Student Financial Services has determined that the Registrar needs to receive the document, you will receive an email stating that they sent you a document to review and sign after they have completed their portion. Click the **Review Documents** link in the email and add any optional commentary in the **Registrar Review-Optional section** (up to 510 characters), then click the **Approve button. Clicking the Approve button closes and completes the document and you will not be able to make any further edits. You must click APPROVE to complete the document.**

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 > Support Home)
"Other Actions" Guide: https://support.docusign.com/en/guides/cdse-user-guide-signing-sign-other-actions-new