

Study Abroad Course Planning & Evaluation DocuSign Process Tips

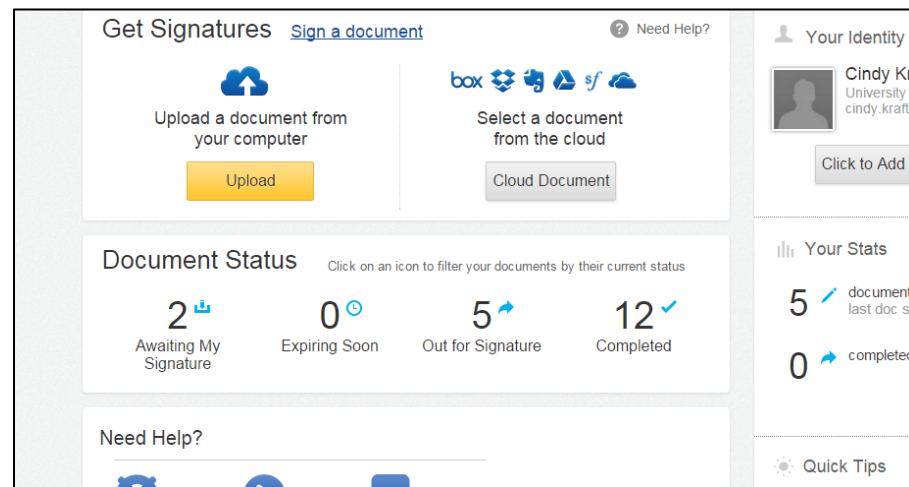
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Completing the form for the first time:

1. When you open your first form, pause and take a minute to get your bearings. Think about how the “old” form was structured as the new form has the same general order and similar fields/information required. The steps you need to take are basically the same as they always were – just think about what you would have done in the past depending on the student’s situation.
2. You will be annoyed by all of the emails at first, but you will get the hang of using your DocuSign homepage, which will allow you to ignore some of the emails you receive. See the screen shot below.

- For example, you can ignore the emails you receive notifying you that a student has sent you a new form, unless the situation is urgent or the student has an appointment soon. Instead, you can use the “forms awaiting my signature” button on your DocuSign homepage to process these on your own timeline.
- Similarly, you could review completed forms on your own timeline and ignore emails alerting you that forms have been completed. Use the “completed” button on your homepage.



Completing and Routing the form (you MUST always route the form to someone)

What is required for you to complete your portions of the form will vary depending on the student’s situation. There are two primary scenarios, but **remember that you will ALWAYS have to route the form to someone** if you receive the form from the student (meaning, if no one else reviewed the form before you).

1. Student is not taking any classes for his/her major OR is only taking pre-approved classes.
 - a. In this scenario, you simply need to look over the form to ensure that the student has a good plan. Consider if you need to provide the student with any advice regarding their online registration for the following semester.
 - b. Then, click the button at the bottom of the form to “sign” and start the routing process.

- c. Lastly, click the link in the email you receive and route the form to Study Abroad at SAForms@colorado.edu (NOT to Cindy Kraft).
2. Student has classes that need to be reviewed.
 - d. In this scenario, look over any/all sections of the form to ensure that the student has a good overall plan. Consider if you need to provide the student with any advice regarding their online registration for the following semester.
 - e. Look over the courses they are submitting for review. Determine if you need to make any notes to the faculty evaluator in the relevant section.
 - f. **If you have the authority to make approvals**, fill out the fields in Part 2. Then, click the button at the bottom of the form to “sign” and start the routing process. Click in the email you then receive and route the form to Study Abroad at SAForms@colorado.edu (NOT to Cindy Kraft).
 - g. **If you need to route to a faculty evaluator**, click the button at the bottom of the form to “sign” and start the routing process. Click the link in the email you receive and route to the relevant person.

All the different emails are confusing – how can I tell them apart?!

DocuSign will send a LOT of emails if you don't update your preferences. And even if you update your preferences, you need to receive some of the emails as they are critical to the process. Here's an overview of the different emails you will receive. While the emails often look the same at first glance, **the body of each email is different and has customized instructional text to help guide you**. So if you receive two emails in a row and are confused, glance at the body of the email and that should help.

- Initial email telling you that a student has sent you a form and you need to review it.
- 2nd email that you'll receive immediately after you submit a form, telling you that you need to route it (that's the email you forwarded below). **You always have to route the form to someone:** either to us or to a faculty member if it requires additional review.
- Email telling you when the form is 100% complete. This means that either the faculty member has completed it, or that our office has received the final version and will soon upload/check-in.
 - If you don't want to receive this notification, you can adjust your email notification settings (see below) and use your DocuSign Home page instead to view completed forms (or use Singularity if you need to view the form further down the road).

How to manage your email settings

DocuSign will send a LOT of emails if you don't update your preferences. Here are instructions/recommendations for changing your email notification settings:

2. Go to docusign.net and login with your email and the password that you selected when you received the activation email from DocuSign. If you never set up your DocuSign email account (perhaps deleted the activation email thinking it was spam), email Mark to request another activation email: mark.diekhoff@colorado.edu
3. Click your profile image (where your photo is or would be) in the upper right, and select Preferences.
4. In the navigation bar on the left side of the page, under the Member Profile heading, click Manage Email Notifications.
5. It is recommended that you un-select all. Then, select the following:
 - a. Under “I am a Signer” select “I have an envelope to sign” and “An envelope that I have signed is complete.”
 - b. Under “I am a sender” (which is a very unlikely scenario) select “An envelope that I have sent is complete.”

A student sent the form to you in error (or, the form needs to be routed to an additional person in the workflow)

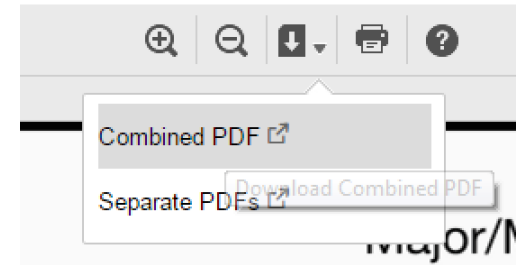
If you are the first person to receive the form (from the student) and realize that the form was sent to you in error before you complete/submit, please do the following:

1. Email Cindy Kraft. Give her the name of the student that completed the form, and the name/email of the correct person that should have received the form.
2. Cindy can update this in the back-end of DocuSign.
3. Note that it isn't possible to change the routing at the next stage – see below.

If the form needs to be routed to an additional (or different) faculty evaluator.

This may be a case where students submitted courses that fall within more than one major area, etc. You, as the Advisor, realize that the courses need to be evaluated by more than one faculty evaluator. DocuSign has no mechanism to allow for this scenario, but we suggest the following work-around.

1. Create a PDF of the form and send it “off-line” to the faculty evaluators via email. Explain that they need to send their course decisions back to you via email.
 - a. **To create a PDF**, have the DocuSign form in question open. At the top of the form, click on the icon with the arrow (see visual) and then click on “Combined PDF.” DocuSign will PDF the form and give you the opportunity to save it wherever you please.
 - b. You can then email this PDF to others as needed.
2. When you receive the decisions back from the relevant evaluators, enter them in the Decision field(s) in Part 2.
3. In the section entitled “Office Use Only – Advisor Notes” enter some notes about the fact that you received the decisions from the faculty via email and entered them yourself.
4. Add any other notes/information to the student (as you normally would – depending on each student’s situation).
5. Complete the form, and route it to Study Abroad (SAForms@colorado.edu).



You filled out/submitted the form and you want to make a change

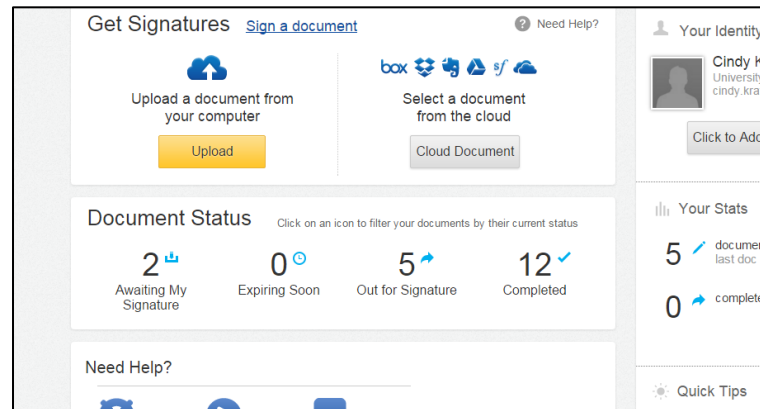
1. Unfortunately, you just can’t go back in and make changes. If the change is minor, consider sending an email (likely either to the student or faculty evaluator).
2. If the change is major (i.e. you realized that the student submitted courses that they don’t even need), you likely need to ask the student to start over with a new form.). As a courtesy to the student, you can send them a PDF copy of the form they submitted (which they can reference as they start a new one). See the section on “Special scenarios and creating a PDF below.”
3. In general, DocuSign is less forgiving of errors. However, it has some built-in steps to help users avoid making mistakes in the first place.

How to view completed forms later

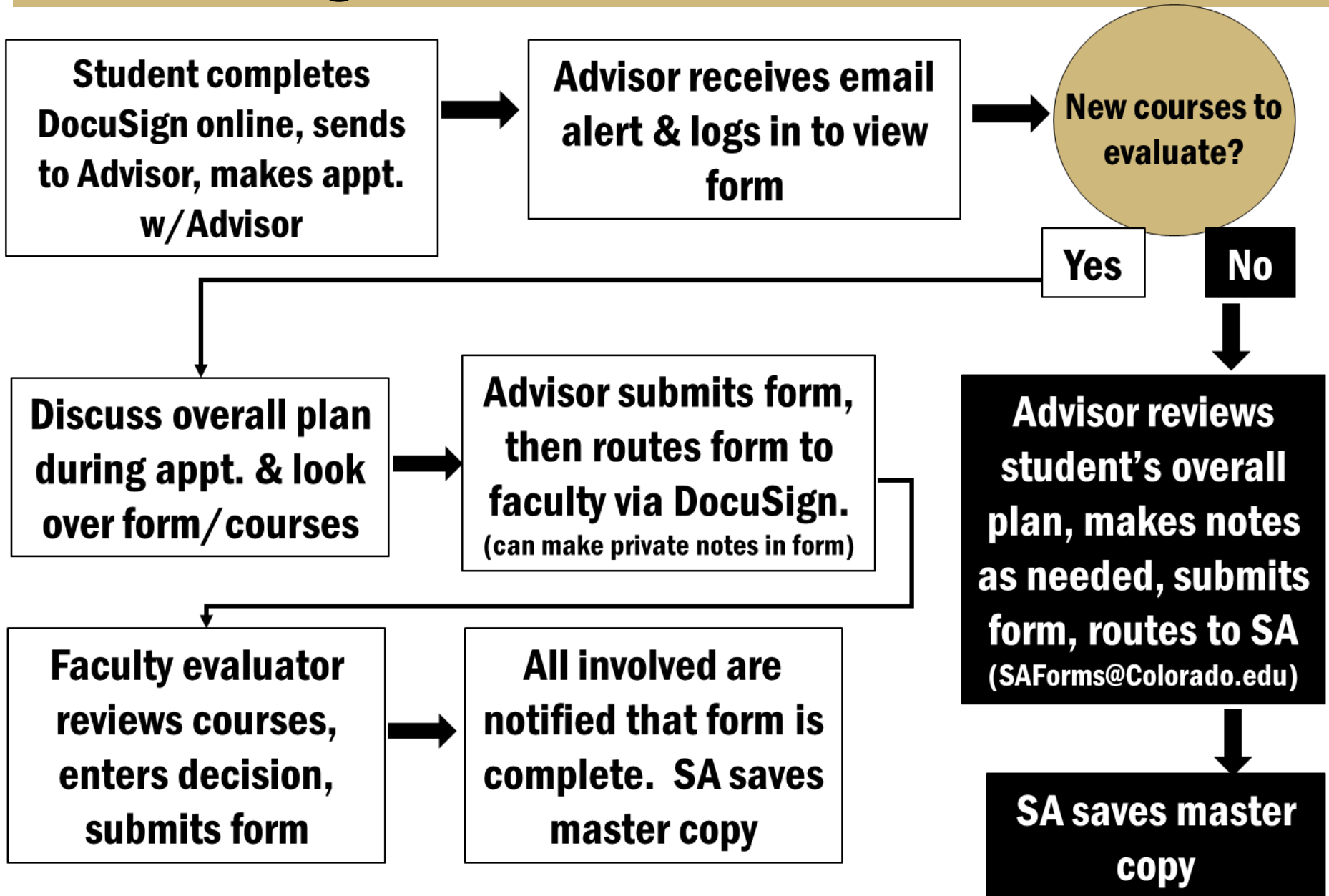
You do NOT need to keep copies of each form once it is complete. Of course, you may wish to make any relevant notes in the Hub or refer to the form elsewhere. Forms will be saved in three places on campus, two of which you can access yourself:

1. All forms that you reviewed and are complete will be accessible to you in your DocuSign account (active from the time that you set up your account). They will NEVER expire as long as your account is active.

- a. Go to docusign.net and login with your email and the password that you selected when you received the activation email from DocuSign. If you never set up your DocuSign email account (perhaps deleted the activation email thinking it was spam), email Mark to request another activation email: mark.diekhoff@colorado.edu
 - b. Click on the “Home” header at the top of the page.
 - c. You will then see a page that looks like the one below.
 - d. Click on the “completed” category.
 - e. In the upper-right, you will see a search field that says “search envelopes.” Type in the student’s last name (or a portion of their name), and any matches will come up.
 - f. Find the student in the list that comes up below. To the far right, you’ll see a little arrow/triangle icon. Click it, and then click “open.” That will open the student’s completed form.
2. All complete forms will also be uploaded to Singularity. There will be a delay with this, but forms should be uploaded in 4-8 weeks. You can view forms there and search by student as you normally would.
 3. Lastly, Study Abroad will upload a copy of the form to each student’s MyCUAbroad portal. If you have trouble finding a copy of the form using one of the methods above, you can always contact us and request a copy of the form.

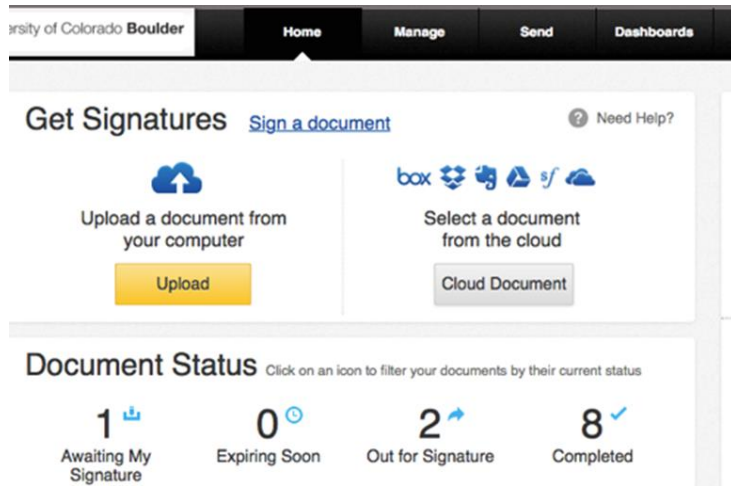


DocuSign: Process overview flow chart



DocuSign: Additional Visuals

Annoyed by the emails? Change email preferences & use your home page instead.



Even if course evaluation isn't needed, other advice/action may be relevant.

PART 3: PLANNING FOR CU-BOULDER ONLINE REGISTRATION WHILE ABROAD

abroad students will need to register online while abroad for CU-Boulder classes in the next semester. Please discuss your registration needs with your Advisor so that you are prepared when you receive your registration reminder.

[The student can be included here:](#)

For guidance when registering - remember you MUST take Econ 2001 next semester to stay on track!

Click the box when you are done reviewing and ready to route.

Advisor Name	Date
Academic Advisor	12/4/2015

Advisors please click here once you have reviewed the form and are ready to proceed with next steps.

Don't forget to click back into your email (or your DocuSign home) to route the form to the evaluator or SAForms@colorado.edu

You have been asked to review and add recipient information.

Please enter the email address and name for the associated role and click 'Complete and Send'.

Note From: Mark Diekhoff - Please assign the form to the faculty evaluator. Or, if you are the one evaluating the form, please enter your email when prompted. Continue by selecting View Document below. Thank you

Role	Email	Name
Evaluator (Office Use Only-Student Please Ignore)	<input type="text" value="Faculty Evaluator"/>	<input type="text" value="faculty.evaluator@colorado.edu"/>

COMPLETE AND SEND

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