

Study Abroad Course Planning & Evaluation DocuSign Process Tips

Completing the form for the first time

- 1) When you open your first form, pause and take a minute to get your bearings.
- 2) You can manage these forms via the emails you receive. Alternatively, you can manage requests through your DocuSign homepage, which will allow you to ignore some of the emails you receive but will require building regular logins/checks in DocuSign into your work schedule.
 - a) If you use the DocuSign homepage, you can use the “forms awaiting my signature” button in DocuSign to process requests.
 - b) Similarly, you can review completed forms in DocuSign by using 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) Simply 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) Cross-check any listed pre-approved classes against the [Course Approvals List](#) to ensure accuracy & that the student won't accidentally be registering for a class with a direct equivalency approval that would be considered as taking repeat credit.
- c) Then, click the button at the bottom of the form to “sign” and start the routing process.
- d) Lastly, click the link in the email you receive and route the form to Study Abroad at SAForms@colorado.edu (NOT to coursesabroad@colorado.edu).

2) Student has classes that need to be reviewed.

- a) Review 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.

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- b) Cross-check any listed pre-approved classes against the [Course Approvals List](#) to ensure accuracy & that the student won't accidentally be registering for a class with a direct equivalency approval that would be considered as taking repeat credit.
- c) Look over the courses they are submitting for evaluation in Part 2. Determine if you need to make any notes to the faculty evaluator regarding included courses.
- d) **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. You'll receive a second email, which you will use to route the form to Study Abroad at SAForms@colorado.edu (NOT to coursesabroad@colorado.edu).
- e) **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 (see below), 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 Ed Abroad 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.

How to manage your email settings

DocuSign will send a LOT of emails if you don't update your preferences. See [DocuSign's Manage Notifications](#) page for instructions on how to update your notifications in your account. And email Mark Diekhoff (mark.diekhoff@colorado.edu) with any questions or issues!

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Troubleshooting problem forms

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:

- 1) Don't make any changes to the form and don't submit it.
- 2) Email coursesabroad@colorado.edu. Provide the name of the student that completed the form, and the name/email of the correct person that should have received the form.
- 3) Ed Abroad can update this in the back end of DocuSign.
- 4) 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:

If, for example, your student submitted courses that fall within more than one major area, unfortunately DocuSign has no mechanism to allow for you to route the form to multiple evaluators. In this scenario you have two options:

- 1) Create a PDF of the form and send it “off-line” to the faculty evaluators via email.
 - a) To create a PDF, open the DocuSign form and select either the Download or Print options. If you Download, select “Combine all PDFs into a single file” before downloading. If Printing, select “Save as PDF” as your print destination.
 - b) Once downloaded, you have the option to delete out select pages (e.g. unnecessary syllabi) but using CTRL+ALT+D.
 - c) You can then email this PDF to others as needed.
- 2) Route the form along to one of the departmental faculty members and include a comment that they can ignore the evaluation requests from the other departments, but ask that they complete the relevant evaluations. Then notify the student that they need to complete a separate evaluation form for each of the other departments as those courses will not get evaluated via this form.

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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 Buff Portal Advising or refer to the form elsewhere. Forms will be saved in two places on campus:

- 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) If you never set up your DocuSign email account, email Mark Diekhoff to request an activation email: mark.diekhoff@colorado.edu.
 - b) Click on the "Home" header at the top of the page and then click on the "Completed" category.
 - c) In the upper-right, you will see a search field that says Quick Search Views that you can use to filter for specific students
- 2) Ed 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.

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EA Course Planning Workflow

