USING AND INTERACTING WITH DOCUSIGN TEMPLATES

Several steps within the Workflow for Assembling and Reviewing the PAD document refer to using DocuSign templates. This tutorial will show where to find the templates, how to use them, and provide some information about interacting with them.

Locating the Templates

1. First, login to your DocuSign account (if you need to request an account, submit a help ticket).

2. Near the top of the page, click “Templates”:

3. From the menu on the left side of the screen, click “Shared Folders” and then click “Tenure and Promotion Recommendations”:
4. You will see the three templates that are available for use for the Personnel Action Summary Form (PASF) and the memos for Tenure and Promotion.

Using the Templates

1. To use a template, click on the purple “Use” button for the desired template on the right side of the screen.

For example, when you use the PASF template, a window will pop up that allows you to input the recipients for the form, and to see the type of action that occurs at each step (signing, receiving a copy, etc.):
2. You input the name and email of each recipient for each step.

Personnel Action Summary Form

3. Once you have finished entering all the names, you click “Send” and the document will be sent to the first recipient.

Interacting with DocuSign Templates
Templates that require a lot of individual entry in the form fields will appear incomplete when you open them in DocuSign. This is because information is left blank for individuals along the approval chain to fill in information.

For example, once the unit administrator enters the recipients for the Personnel Action Summary Form and clicks “Send,” when the unit administrator logs in to review the form and fill it out, they will see a form with a lot of blanks:
To enter text, you click within the boxes outlined in red, and begin typing:
Once you are done entering in the required information, you can select one of the yellow “Finish” buttons (either at the top of the window or at the bottom of the form):

Clicking “Finish” will move the document to the next signer, who is the Committee Chair. The Committee Chair needs to select the appropriate box on the form, then click “Finish”:

Select the appropriate box to indicate the committee recommendation.
The next step is the Unit Administrator Recommendation, and the instructions in the notification email are:
“When the candidate review is complete, please open DocuSign and check the appropriate box on the Personnel Action Summary Form.”

So, once the Unit Administrator logs in, they can fill in the appropriate box and click “Finish” to move it forward:

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<table>
<thead>
<tr>
<th>Source</th>
<th>Recommended</th>
<th>Not Recommended</th>
<th>Not Applicable</th>
</tr>
</thead>
<tbody>
<tr>
<td>Appropriate Unit Personnel Committee</td>
<td>✔️</td>
<td>✗</td>
<td>✗</td>
</tr>
<tr>
<td>Chair/Unit Head</td>
<td>✗</td>
<td>☑️</td>
<td>☑️</td>
</tr>
<tr>
<td>Director</td>
<td>☑️</td>
<td>☑️</td>
<td>☑️</td>
</tr>
<tr>
<td>Dean</td>
<td>☑️</td>
<td>☑️</td>
<td>☑️</td>
</tr>
<tr>
<td>Provost/Vice Chancellor</td>
<td>☑️</td>
<td>☑️</td>
<td>☑️</td>
</tr>
<tr>
<td>Chancellor</td>
<td>☑️</td>
<td>☑️</td>
<td>☑️</td>
</tr>
<tr>
<td>Board of Trustees</td>
<td>☑️</td>
<td>☑️</td>
<td>☑️</td>
</tr>
</tbody>
</table>
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The form will move forward until the Dean indicates their recommendation and then the Unit Administrator will get a copy in their email that shows the Dean’s decision. The unit administrator can then add the completed form to Folder A in the candidate’s electronic PAD.