Sending Student Personnel Action Forms in DocuSign

Introduction

Unlike the Faculty/Staff Personnel Action Form (PAF), the Student Personnel Action Form (PAF) is just a fillable PDF form. The PDF is maintained and routinely updated by Human Resources. Since DocuSign has most of the same capabilities that a native PDF Form does, moving the Student PAF into DocuSign gave us an opportunity to combine two processes into one. Instead of downloading the fillable PDF form from HR's website, filling it out, and uploading it to DocuSign, you can initiate a Student PAF directly using a DocuSign template. This document will explain the process we have developed to allow you to do that. Note that while this process was developed by a collaboration of Human Resources and the Office of the Provost, these instructions are intended to be used University-wide.

IMPORTANT: Routing First

The most significant change to your normal workflow for Student PAFs is that to initiate a template in DocuSign, the first step is to tell DocuSign who will be signing the document. Normally you would download the PDF, fill it out, save it, and then send it (on paper) to all the people who need to sign. Now you will need to think about the signers first. For that reason, the first thing discussed here is all the possible signers, and the signing order. The image below shows the bottom portion of a Student PAF and specifies what order they are expected to sign, as set up in DocuSign.

20. Approval: (Hiring Department) Date **1st - REQUIRED**	21. Approval: (Human Resources) Date **7th - REQUIRED**
22. Additional Approvals: (as required) Date **3rd - optional**	23. Approval: (Foundation) Date **4th - optional***
24. Approval: (Principal Investigator) Date **2nd - optional***	25. Approval: (Research Administration & Engagement) Date **5th - optional***
26. Approval: (Graduate School) Date **6th - optional***	Level # of Credit Hours ☐ Last Degree Course ☐ Thesis/Dissertation

As the image shows, the only strictly required signatures are the hiring department and Human Resources. The rest of the signatures are optional in DocuSign, which means you are allowed to remove them – *but you should only do so if they are not necessary for the Student PAF you are preparing*. Just like submitting a paper document, if the form reaches HR and does not contain all the necessary signatures, the PAF will not be processed. Furthermore, HR will not have the ability to add back any signatures that the initiator removes. If all the required signatures are not present when the PAF arrives at HR, it will simply be declined. You will have to start over and everyone who has already signed it will have to do so again, in addition to the ones who were omitted the first time. If you are unsure of who needs to sign a Student PAF you are encouraged to contact HR before you initiate the template.

* As a reminder, boxes 24 and 25 (PI and RAE) are required if the pay index begins with 16, 18, 21, 22, R, or CR. Box 23 (Foundation) is required when the pay index is a Foundation account. Box 26 is required for all Graduate Assistants.

Initiating the DocuSign Template

The first step is, of course, to log into DocuSign. The easiest way to do this is to log into MyUWF and search for DocuSign. Click the link to open a new tab where you will be logged in automatically to your UWF DocuSign account.
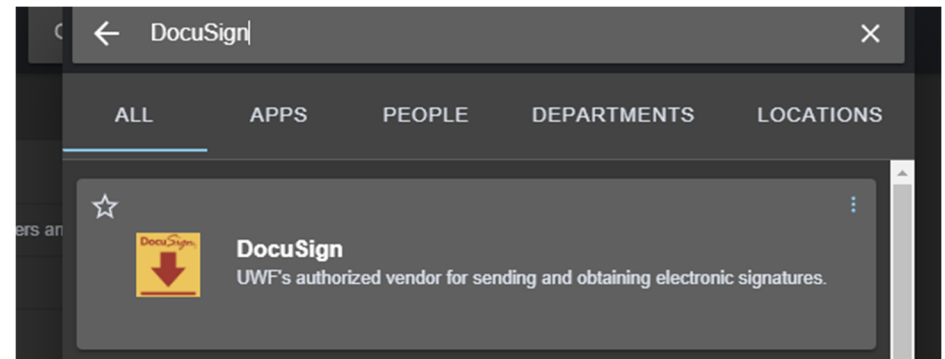

On the Home page, click the yellow **NEW** button and select **Send an Envelope**. On the next page, click **Use a Template**.
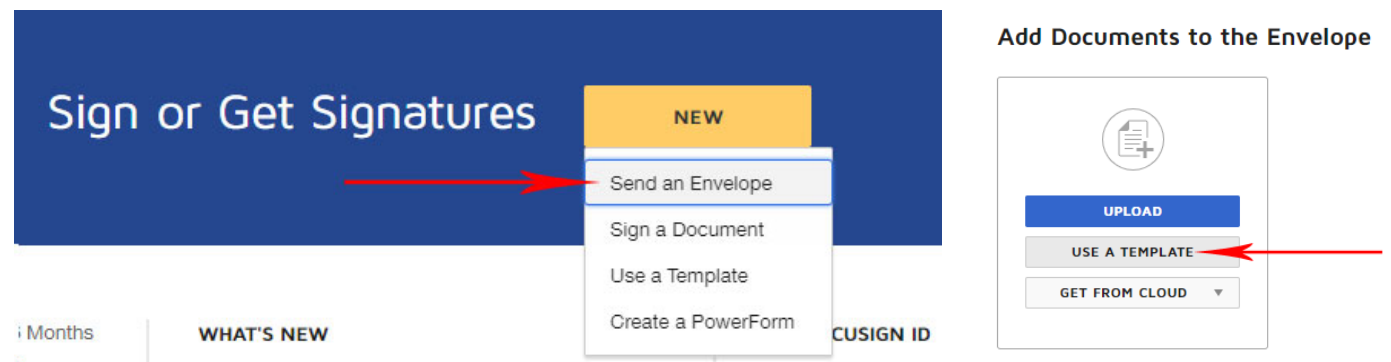
Click **Shared with Me**, then search for "Student Personnel Action Form". Select the template with that name and click the blue **ADD SELECTED** button at the bottom left.

At this point, if you have additional documents to attach to the PAF, you may do so by clicking the blue **UPLOAD** button in the box to the right of the PAF and selecting additional files.
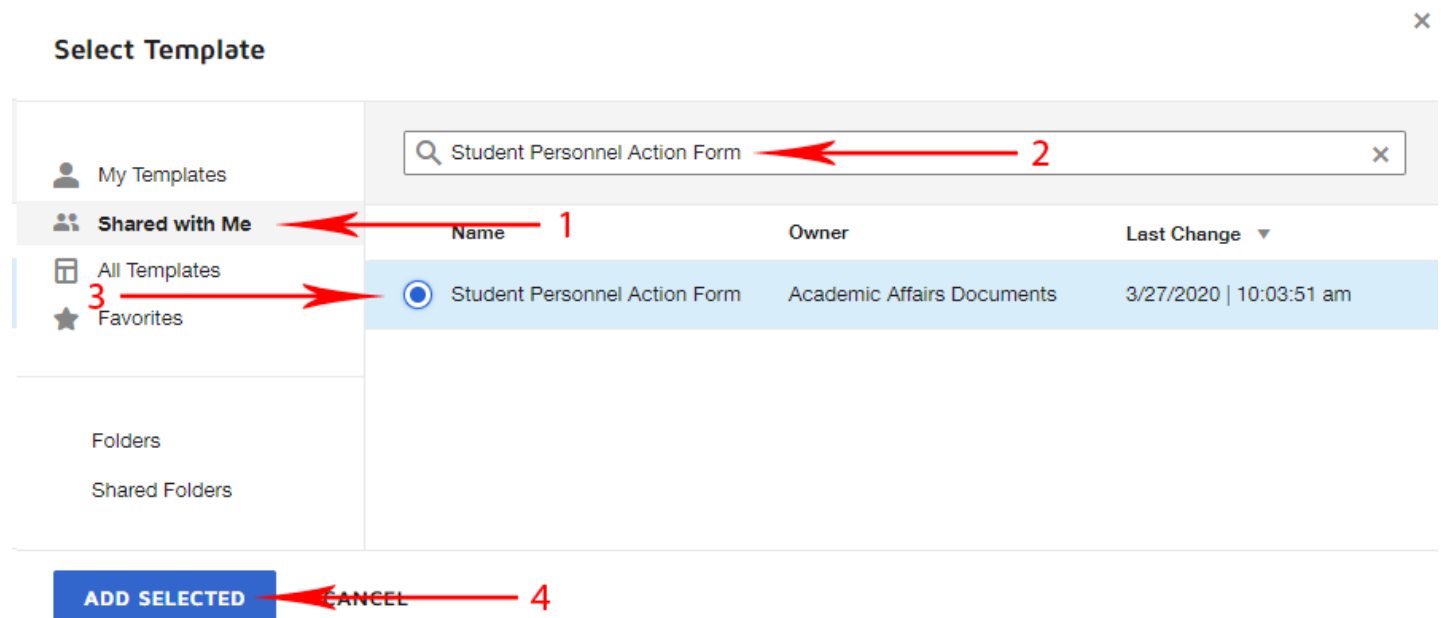
Setting up the Signers

Below you will see the list of signers. It is important to note that in DocuSign terminology, a "signer" is anyone who needs to interact with a document's contents. That could be someone who is adding their signature or initials, or it could be someone who is expected to select values for form fields. In the case of the Student PAF workflow, the first "signer" – called the Initiator – is the one who will be filling out the PAF. Usually this will be the same person who is using the template. The next two signers are the Hiring Department and Principal Investigator. Those two truly are for signatures in the corresponding boxes (19 and 23, respectively) on the Student PAF. As mentioned above, the Hiring Department signature is required. You must specify the person who needs to sign in that box. It should be the same person who you would have had sign that box on the paper PAF. If the PI signature is not required it can be removed from the DocuSign workflow by hovering over the signature box and clicking the black "X" icon that appears to the right of the box. The first three signers look like this:

Student Personnel Action Form

Recipients

1   **Initiator**   ✎ NEEDS TO SIGN   MORE ▼

Name *

Andrew Carden

Email *

acarden@uwf.edu

2   **Approval: (Hiring Department)**   ✎ NEEDS TO SIGN   MORE ▼

Name *

Andrew Carden

Email *

acarden@uwf.edu

3   **Approval: (Principal Investigator)**   ✎ NEEDS TO SIGN   MORE ▼

Name *

Email *

The next four signers are Additional Approvals, Foundation, Research Administration and Engagement, and Graduate School. All of these are optional in DocuSign. They can be removed using the black "X" icon to the right of each signer's box, if not necessary for the Student PAF you are preparing. Otherwise you should enter the person who should sign on each line. Some signers will be auto-populated and, unless you are instructed to do so by Human Resources, you should not change those signers. As you type, DocuSign will provide suggestions that match the name or email you are typing. You should select the suggested names/emails to ensure you are using the correct official name and email that DocuSign knows for that person. These signers look like this:

| 4 | **Additional Approvals: (as required)** | ✎ NEEDS TO SIGN ▼ | MORE ▼ |

Name *

Email *

| 5 | **Approval: (Foundation)** | ✎ NEEDS TO SIGN ▼ | MORE ▼ |

Name *

Eva Butts

Email *

ebutts@uwf.edu

| 6 | **Approval: (Research Administration & Engagement)** | ✎ NEEDS TO SIGN ▼ | MORE ▼ |

Name *

Beth Moulder

Email *

bmoulder@uwf.edu

| 7 | **Approval: (Graduate School)** | ✎ NEEDS TO SIGN ▼ | MORE ▼ |

Name *

Trish Holmes

The last signer is Human Resources. Not only is this signer required, but the recipient is not editable. It will always go to the DocuSign signing group HR has set up to receive PAFs, hrrecords@uwf.edu.   The bottom of this page is an area that allows you to specify the email subject. The subject will default to "Please DocuSign: Student Personnel Action Form". You should leave that part of the subject as is, but may add additional information after it, such as the student's name. For example, a good subject could be "Please DocuSign: Student Personnel Action Form for John Doe". The maximum length of the subject is 100 characters, so you have an additional 54 characters beyond the default subject. Once you have filled out all necessary signers and set the Email Subject, click the **SEND NOW** button at the bottom right. The bottom of the signers page looks like this:

Filling out the Student PAF

Once you have defined all the signers and clicked **SEND NOW,** it will initiate the DocuSign envelope and notify the first recipient that they have a document to sign. In this case the first recipient is the signer titled "Initiator", which will probably be the same person who began this process. If that is the case, DocuSign will have a dialog box pop up that will ask if you would like to sign the document now. You can click **SIGN NOW** or **SIGN LATER**. If you choose **SIGN NOW** you will be taken directly to the next step in the process. If you choose **SIGN LATER**, you can find the envelope in your DocuSign inbox by going to the **Manage** tab in DocuSign. Once there, click **SIGN** to continue the process.
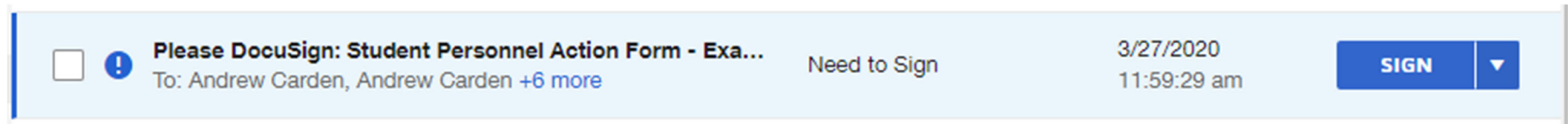
You will be taken to the interactive student PAF page. Click the green **CONTINUE** button to begin filling out the form.

Filling out this form will be almost exactly the same as filling out the fillable PDF Form you are used to using.

The fields with red borders are required. You will not be able to complete the form and send it to the first signer until all those fields have values.

NOTE: Although Beginning Date and Ending Date are not red-bordered required fields in DocuSign, these dates MUST be completed, as applicable for the specific action requested for the Student PAF you are preparing.

Once you have filled out all required fields and any other necessary fields, you may click the green **FINISH** button at the top of the page. This will send the completed Student PAF to each signer and then to HR.

That's It!

That is all there is to sending Student PAFs in DocuSign. If you have any question about the Student Personnel Action Form or the correct routing thereof, contact Human Resources at hr@uwf.edu or 850.474.2694.