The College Declaration of Major Form – DocuSign Process

The College has transitioned to a DocuSign form for our Declaration of Major form. This transition will allow students to easily submit forms from anywhere in the world, as well as ensure that all forms that we receive contain the correct information and approvals. It also enables all signatory parties to know when the form has been completed, as they will receive an email alerting them that the document has been completed. Below is a step-by-step walk-through for the DocuSign process of declaring a major OR a minor. In the case of the minor, the student would simply check the box next to "This is for a Minor Declaration" in the middle of the form.

Step 1: The College Forms Site

For a student to start the process of filling out the DocuSign form, they will simply click on the orange link designated by the red arrow below. Please note the wording for the description. Students are encouraged on the College pages that reference declaring a major or minor to contact the Declare a Major/Minor Contact (DMC) before they start the process. They're encouraged to do this to ensure that they follow whatever process your department has set up. For example, some departments prefer for the student to fill the form out while they're in a Zoom meeting with their advisor or another department administrator.

PLEASE START THE DECLARATION PROCESS BY VISITING THE DECLARE A MAJOR/MINOR CONTACT PAGE AND FIND THE DEPARTMENT YOU WOULD LIKE TO DECLARE A MAJOR IN. CONTACT THE PERSON LISTED FOR THE DEPARTMENT VIA EMAIL TO DETERMINE WHAT STEPS YOU NEED TO FOLLOW TO DECLARE A MAJOR.

Declaring Minor: Please reach out to the deparment contact to determine what steps you need to follow to declare a minor. Not all departments use the DocuSign form.

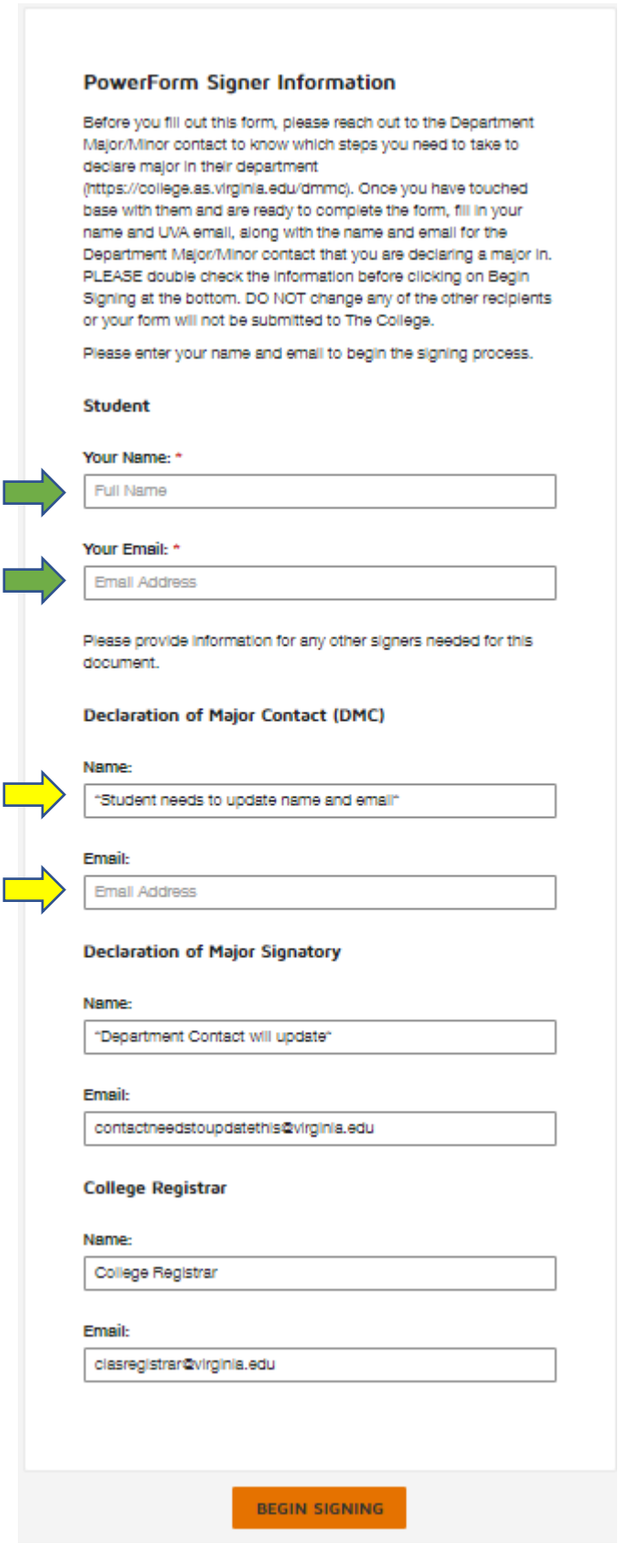
Please review the preview of the form below to see what information you'll need to complete BEFORE starting the DocuSign process (required fields are highlighted in yellow on the preview). Please note: this form is not for submission. Declaration of Major or Minor must be submitted via DocuSign.

--Preview PDF--

Next Step: The PowerForm

Step 2: The PowerForm

After the student clicks on the link, they'll automatically be directed to a DocuSign site that asks the student to designate who will receive the form once the student fills out their portion. This initial site is called a PowerForm and allows the initiator of the form to designate who will be receiving the form, where appropriate. Below, you can see where the student will enter their name and email in the areas marked with green arrows. They will then enter the Declaration of Major Contact name and email in the areas marked with yellow arrows. They do not need to update the Declaration of Major Signatory field, as the DMC will populate that information when the student signs the form and finishes their portion. Nor do they or the DMC need to update the College Registrar information, as the form is set to automatically be routed to our registrar's office when the department has completed their portion of the form. Once the student fills in the areas marked with arrows below, they will click on Begin Signing at the bottom of the PowerForm.

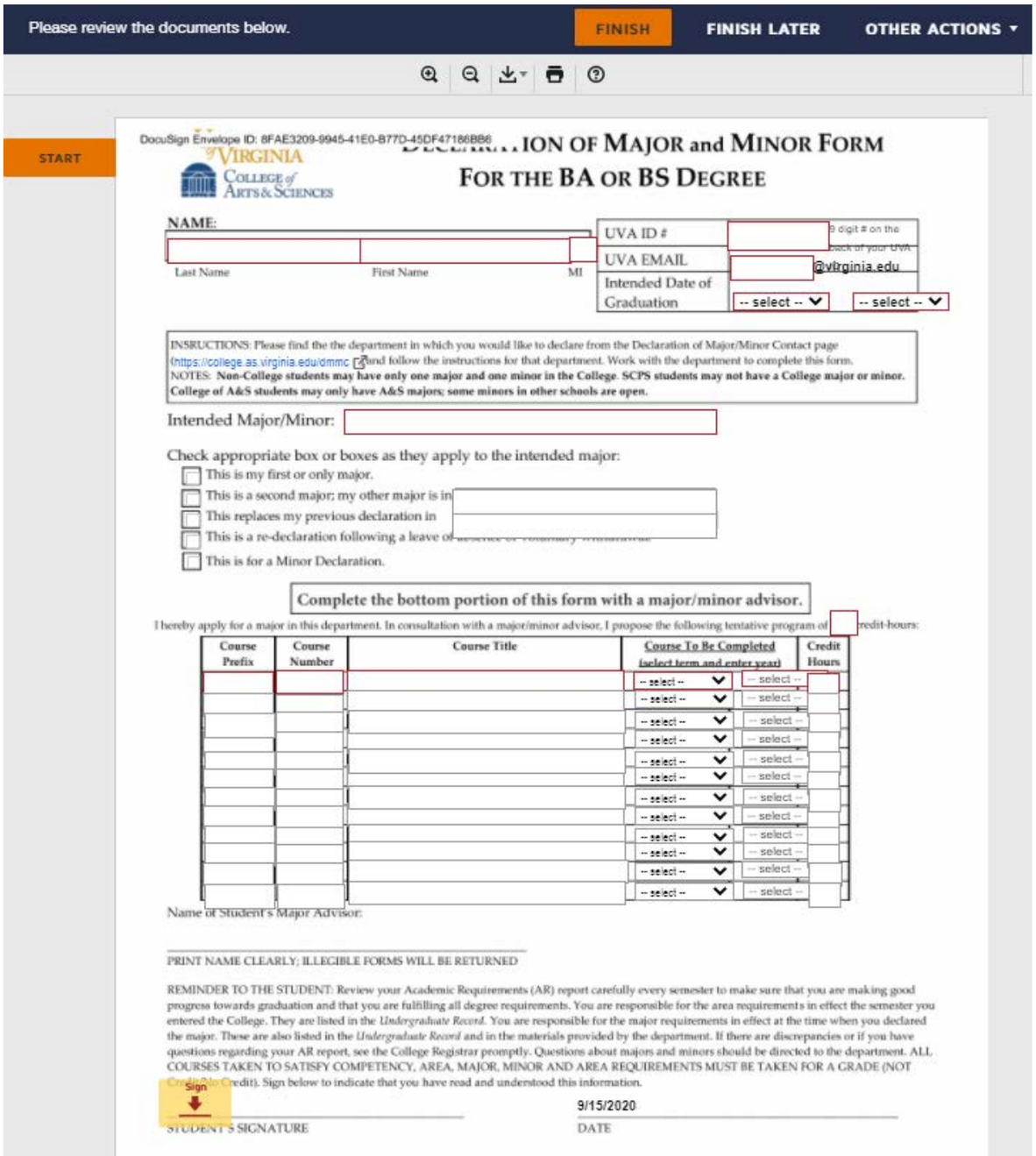


Next Step: The Declaration of Major Form

Step 3: The Declaration of Major Form

Once the student clicks on Begin Signing, they will be directed to the actual DocuSign form to fill out. Please note that this is a separate step in the DocuSign process from the PowerForm. If a PowerForm is started, but Begin Signing isn't clicked, DocuSign does not consider the form as started and an "envelope" isn't created. Once Begin Signing is clicked, and "envelope" is created and the form will open and the student can begin completing the form. Also note that, once an envelope is created, the DocuSign form will show up in The College's DocuSign portal to see. So if you are creating test forms, every time you click Begin Signing that form will show up in our portal regardless of the information that you have (or have not) populated. To alleviate departments or students creating test forms simply to see what information is listed on the form, we've added a –PREVIEW PDF— link on the forms site where you can view the form (also linked HERE).

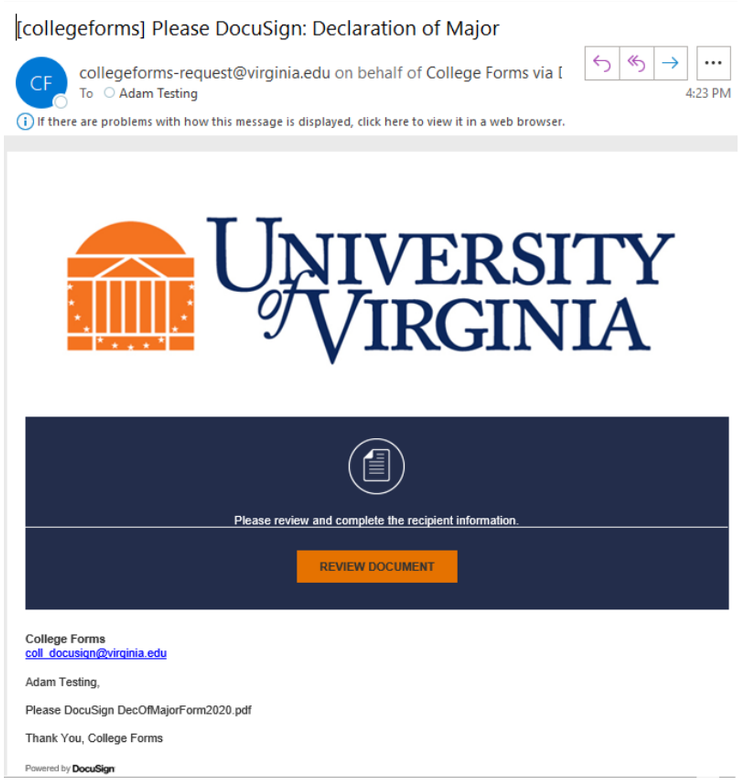
The completion of the DocuSign Declaration of Major form is (for the student) very similar to completing a form when it was a .pdf. The main differences are that we can easily require fields and the information submitted via DocuSign is secure, as opposed to the .pdf being emailed in once it was filled out. As you can see below, there are fields that are marked with red boxes. If a field is red, the student will be required to enter some sort of information in that field before they can finish the form. They do not have the option of leaving required fields blank. You'll also notice some fields or checkboxes that are not red. Those fields are optional and the student can either fill them out or leave them blank. Once the student fills in the appropriate fields and "sign" the form, they can click Finish to submit the form. If they have not completed a required field, or they've entered incorrect information in certain fields (in some fields we require the students to enter a specified number of numbers, such as their 9 digits for their UVA ID # or 4 digits for the Course Number field). After the student "finishes" the form, an email will automatically be sent to the whomever the student listed as the DMC on the PowerForm.



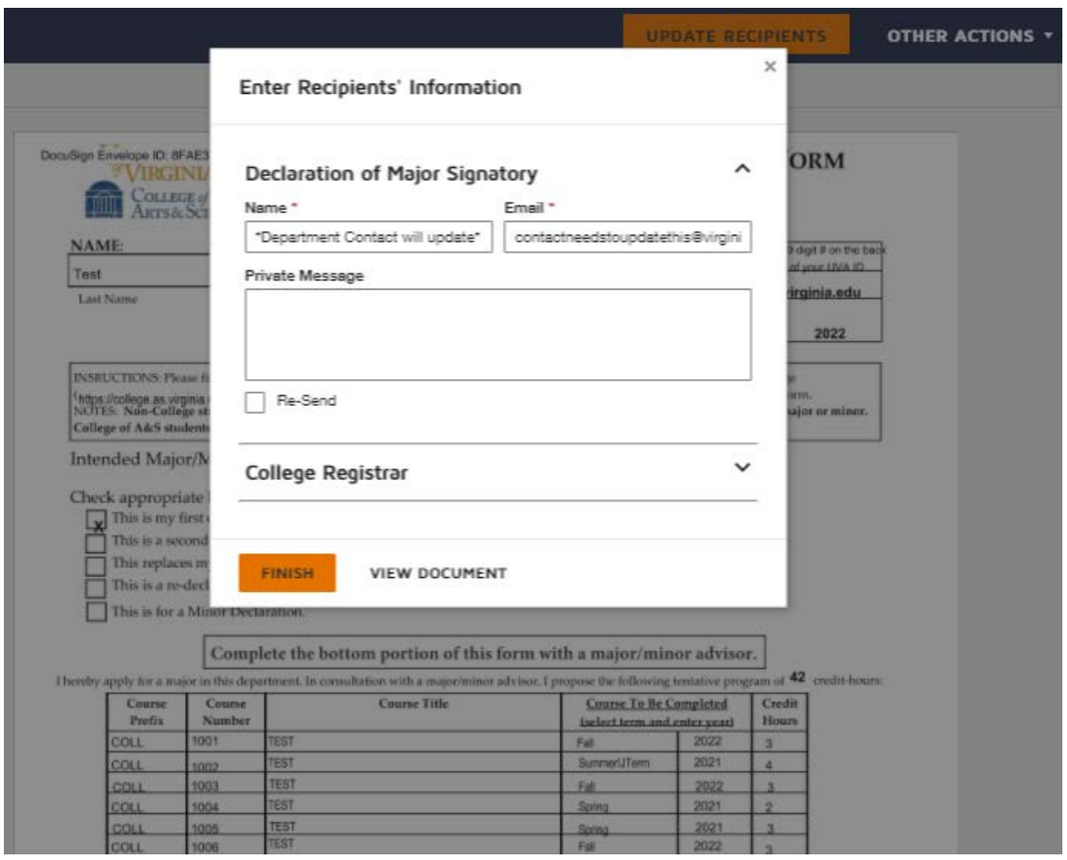
Next Step: The Declaration of Major Contact

Step Four: The Declaration of Major Contact

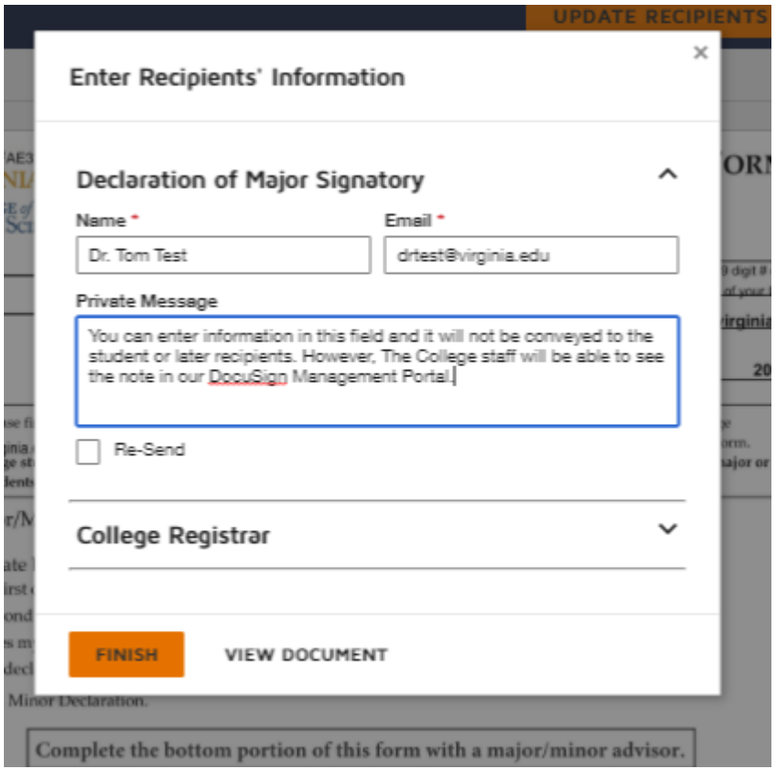
Assuming the student entered the information in correctly, the DMC will receive an email from DocuSign prompting them to review the document. The title of the email should be Please DocuSign: Declaration of Major, or something similar (see below).



When you click on the "REVIEW DOCUMENT" button, you will automatically be directed to the DocuSign site. As you can see below, the form with the student's information is in the background and a window asking for you to Enter Recipients' Information is in the foreground. You'll be working in that foreground window. As you can see, it prompts you to update the name and email of whomever will be the signatory of the declaration of major in your department. Please note that this signatory varies widely throughout A&S. Some departments have the DUP sign the form, while others have the actual student's faculty advisor, with some departments granting that authority to the administrators. (It is up to the department to determine how they handle this process, and because of the varied processes we are trying to leave the DocuSign approval process as unrestricted as we can. Having the form go to a DMC first instead of straight to the DUP for signature is as unrestricted as DocuSign allows us to be.) If the DMC and signatory are the same person, the DMC will simply enter their own name and email in the Declaration of Major Signatory fields and the form will be directed to them for signature. Once the Declaration of Major Signatory info is updated, the DMC can click on the FINISH button at the bottom of the foreground window. You can also click on VIEW DOCUMENT to remove the foreground window. When you're ready to continue updating the form or finish it, click on UPDATE RECIPIENTS at the top. IMPORTANT: you do <u>not</u> need to update the College Registrar information. Altering that information may end up causing your form to not be routed to The College, and the form will not be completed.



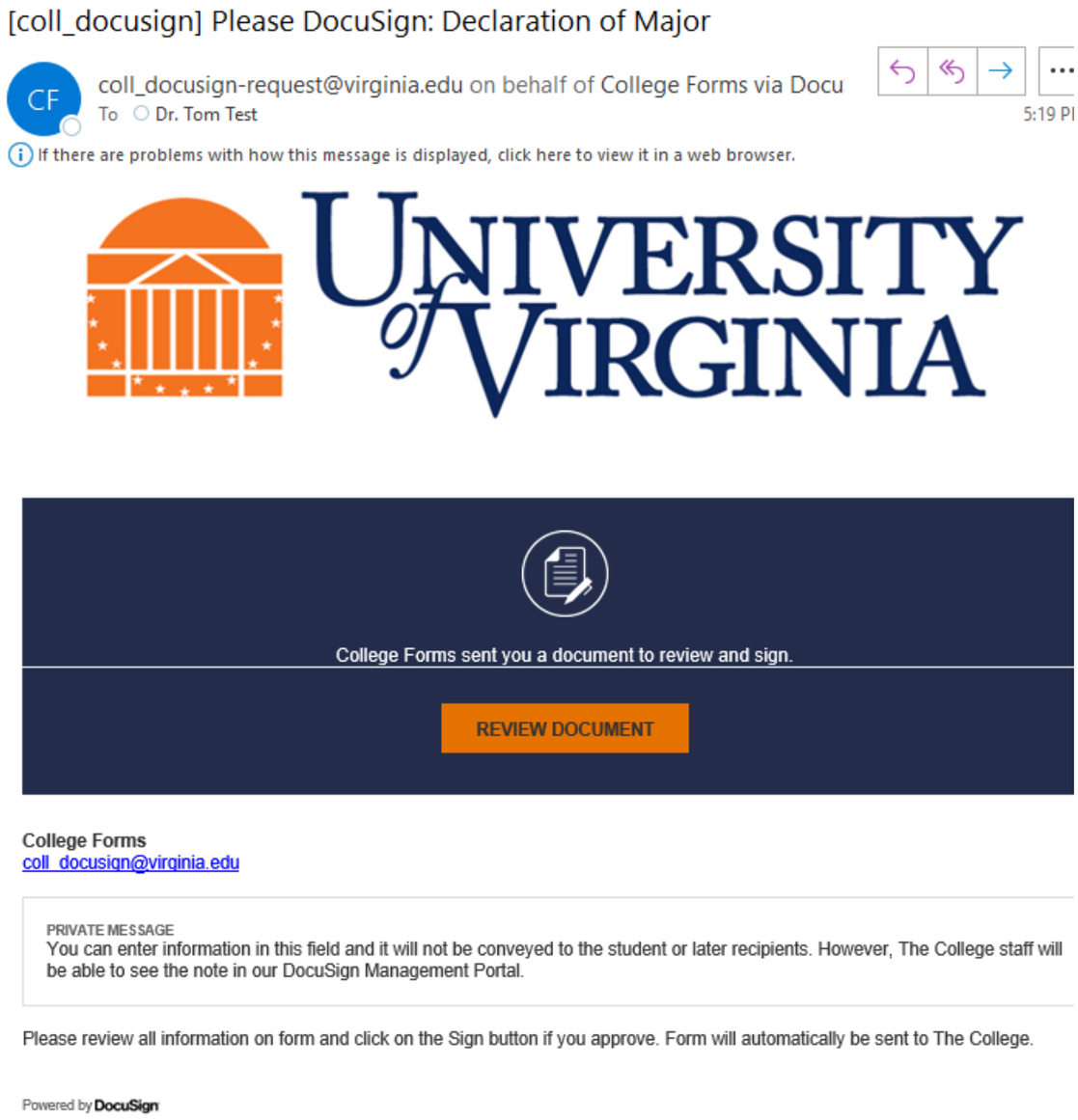
Below is an example of how you might complete the form, with your signatory's information.



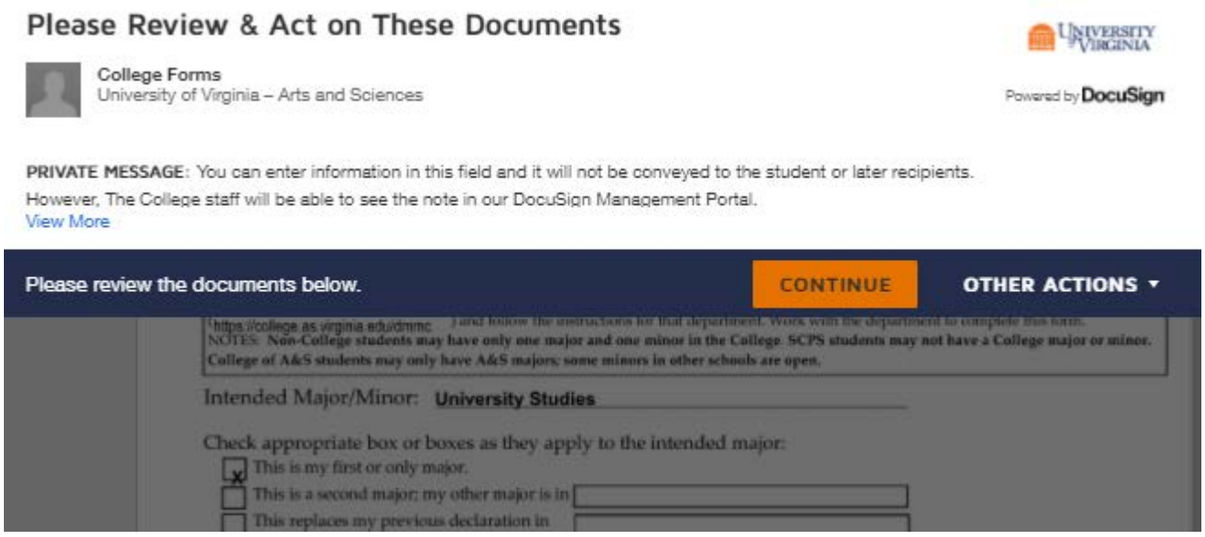
Next Step: Department Signature for Approval

Step Five: Department Signature for Approval

Once the DMC finishes assigning the Declaration of Major Signatory, the form will be routed to the person that was listed in Step Four. The signatory will receive an email similar to the one below. You can see the private message that was entered in for the last step. The signatory can click on REVIEW DOCUMENT and the form will automatically take them to the DocuSign form for signature.



As you see below, the private message is also conveyed at the top of the site when the signatory enters the DocuSign page.



After the signatory clicks CONTINUE, they'll see the form with the information that the student filled out and a red box prompting them to enter their name and then click on the "Sign" button (Figure 1). If they choose to do so, and then click FINISH, their signature will act as approval for the student's Declaration of Major form and will be routed to The College Registrar's office. ****If the Major Advisor is not the same as the signatory, please make sure that the Major Advisor's name is entered in the field for "Name of Student's Major Advisor". You do not need to worry about typing out your name if you are not the major advisor. That information is captured multiple times in the DocuSign process.**** If they determine that they can not approve the form, they can click on OTHER ACTIONS and then Void or Decline to Sign (Figure 2) and enter a brief explanation as to why they chose to not approve the form. The student will then receive an email notifying them of that decision and they will have to start a new form. After the department signatory completes their step in the process by either approving or voiding/declining to sign, the department's part in the DocuSign process is

complete. As noted before, the form will be routed to The College Registrar's office for processing.

Figure 1

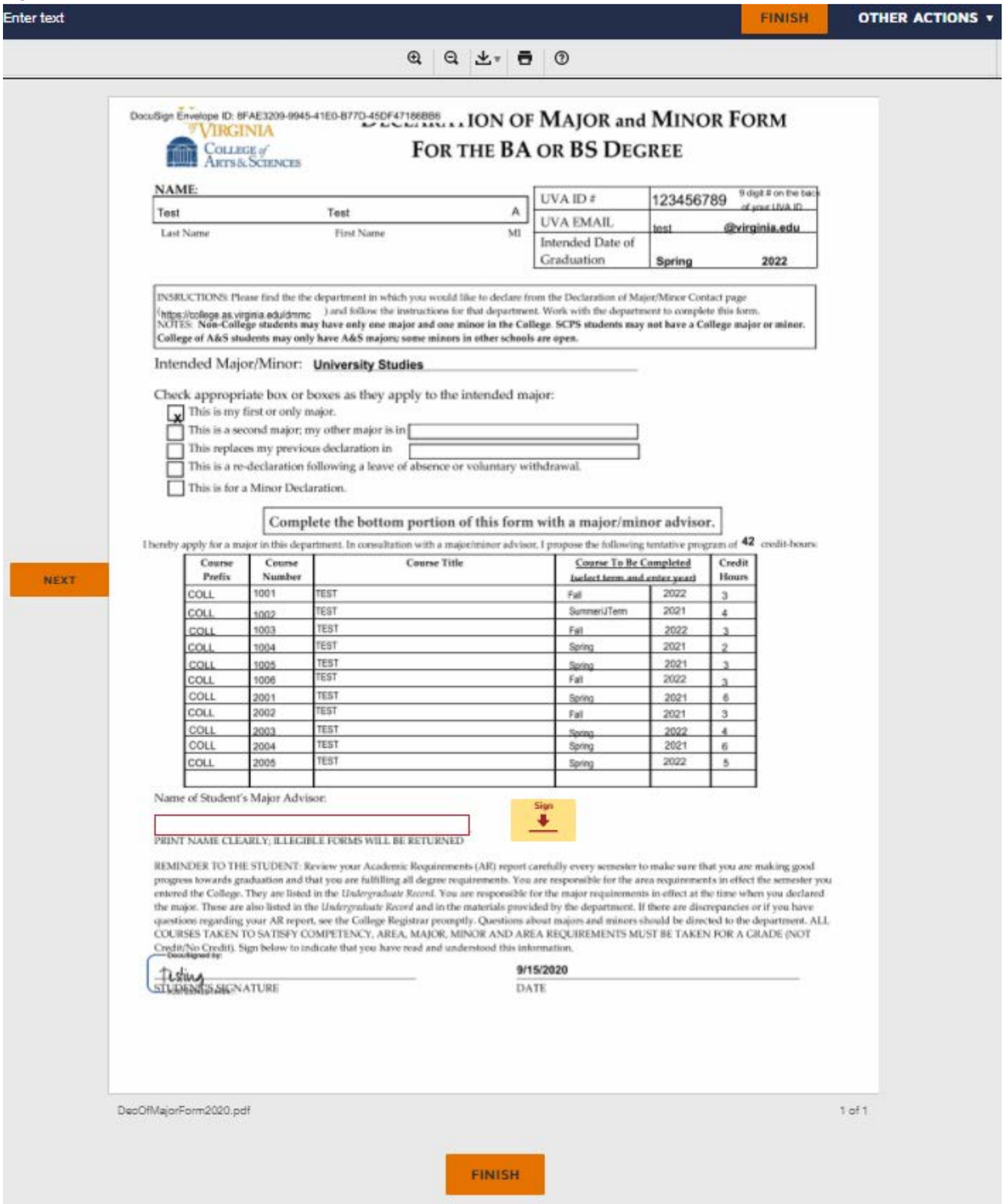
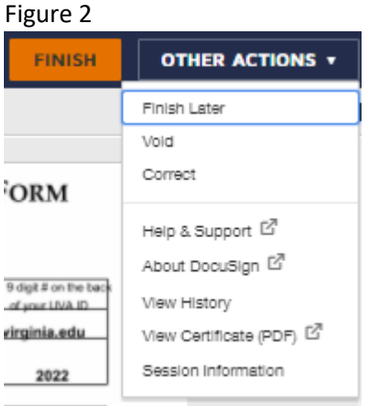


Figure 2



Next Step: Document Completion

Step Six: Document Completion

After The College Registrar has processed the document, they will initial the form and complete the DocuSign process for this form. At that point, an email will be autogenerated and sent to all signatories (in this case that would mean the student, the departmental signatory, and the COLL Registrar) as you can see below in Figure 1. This email contains a link that will direct the recipient to a DocuSign site where they can view the completed form and print the form or download a .zip file of the form (Figure 2). The easiest method to download the .pdf is to simply click print and DocuSign will autogenerate a .pdf. You can then download the .pdf or you can print the file and have a hard copy. The DocuSign process is now complete!

Figure 1

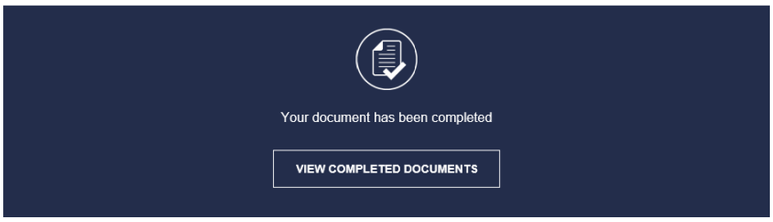
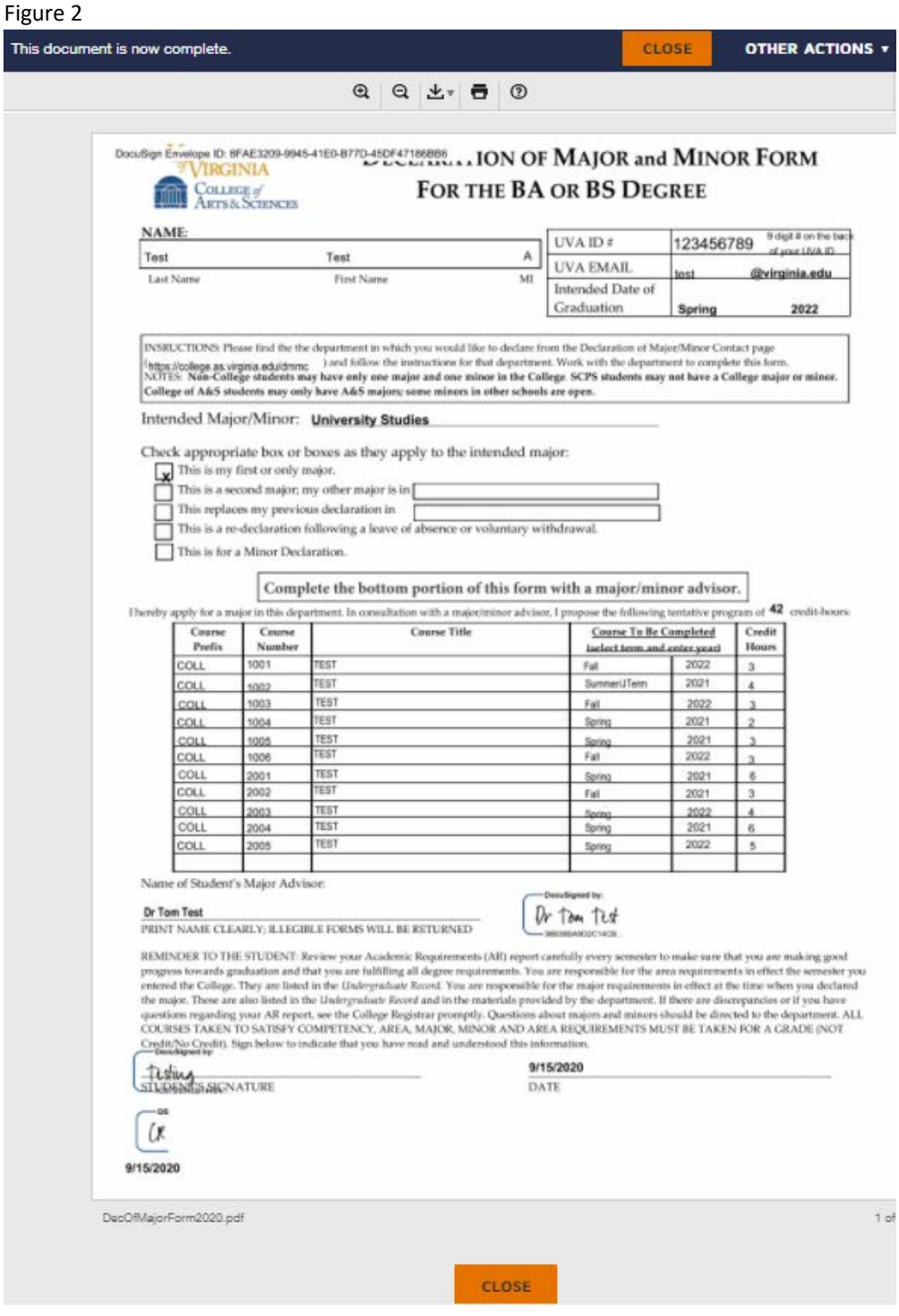


Figure 2



If you have any questions about this process, please feel free to reach out to Adam Richard via email at ar5se@virginia.edu. Thanks for all of your help and understanding during this transition to DocuSign. We're figuring out and fixing the bugs as we find them, so please let us know if something isn't working as intended.

Thank you!

Adam Richard
College Business Administrator