

CONTRAXX USER GUIDE

Overview

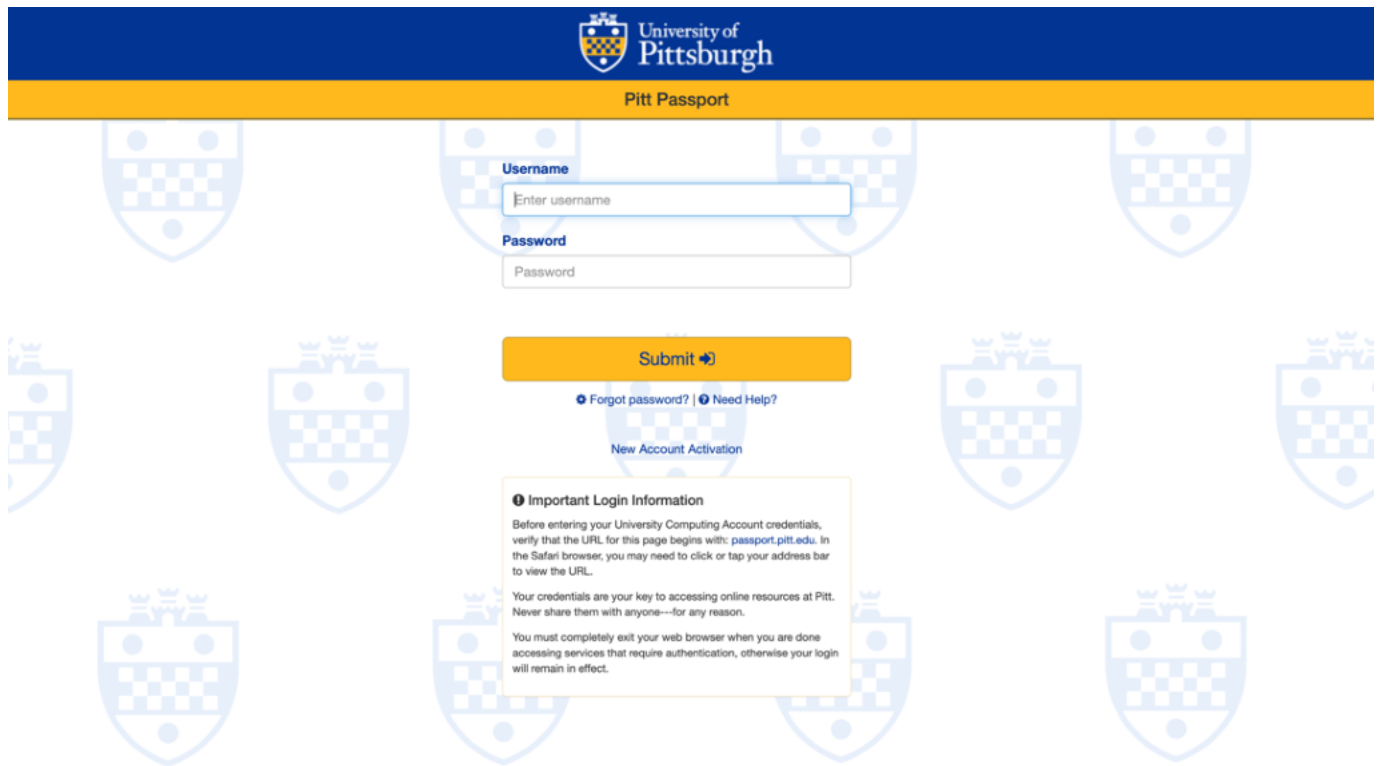
This guide will help you navigate the International Partnership Request System at the University of Pittsburgh for all inter-institutional agreements at the University, including agreements made through the Health Sciences.

The University partners with institutions across the globe to expand its curricular offerings, research collaborations, and intercultural opportunities for mobility of students and faculty. [University of Pittsburgh Policy 02-01-05](#) was developed to provide a mechanism for initiating, amending and/or renewing international agreements. The University's process for preparing and renewing agreements with international institutions exists to protect the interests of staff, faculty and units working to establish linkages, as well as to protect the interests of the University as a whole. The policy governs agreements having the following characteristics: *...any agreement 1) between the University of Pittsburgh and one or more foreign governments and/or universities or other organizations domiciled outside the United States, regarding the use of this University's faculty, student, library or other research or instructional resources within the United States or 2) that commits the University of Pittsburgh to the deployment of faculty, student, library or other research or instructional resources outside of the United States.*

Those wishing to host visitors (who are not part of an existing Exchange Agreement and are uncertain if a Visitors Agreement is required; should refer to the [Pitt Academic Visitors](#) web-page hosted by the Office of Trade Compliance. Faculty and administrators considering an international inter-institutional agreement should follow the steps listed below.

Agreement Process: Step-by-Step

1. The International Agreement Partnership Request process relies heavily on DocuSign, an online system for document signature workflow. The University provides accounts for free to all faculty and staff. Before starting your international partnership application, you should take a minute to make sure your DocuSign profile is properly set up.
2. Start by going to my.pitt.edu in your browser. Login to your account using your username and password.



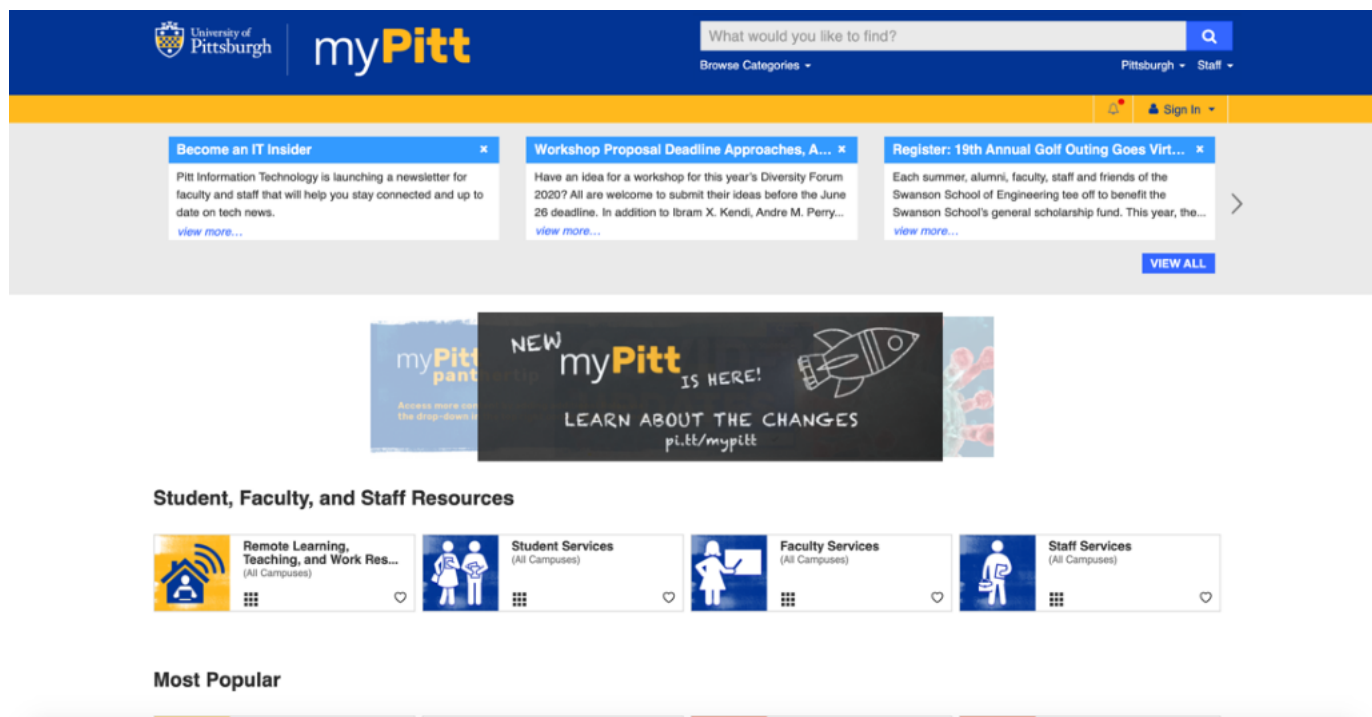
The login page features the University of Pittsburgh logo at the top. Below it, the "Pitt Passport" title is centered. The login form includes fields for "Username" (with a placeholder "Enter username") and "Password" (with a placeholder "Password"). A yellow "Submit" button is positioned below the password field. Links for "Forgot password?", "Need Help?", and "New Account Activation" are provided. A yellow box titled "Important Login Information" contains the following text:

Important Login Information
Before entering your University Computing Account credentials, verify that the URL for this page begins with: passport.pitt.edu. In the Safari browser, you may need to click or tap your address bar to view the URL.

Your credentials are your key to accessing online resources at Pitt. Never share them with anyone—for any reason.

You must completely exit your web browser when you are done accessing services that require authentication, otherwise your login will remain in effect.

Once you have logged in you will be taken to the following screen:



The myPitt homepage features the University of Pittsburgh logo and the "myPitt" branding. A search bar at the top right asks "What would you like to find?". Below the search bar, there are three featured articles:

- Become an IT Insider**: Pitt Information Technology is launching a newsletter for faculty and staff that will help you stay connected and up to date on tech news. [view more...](#)
- Workshop Proposal Deadline Approaches, A...**: Have an idea for a workshop for this year's Diversity Forum 2020? All are welcome to submit their ideas before the June 26 deadline. In addition to Ibrahim X. Kendi, Andre M. Perry... [view more...](#)
- Register: 19th Annual Golf Outing Goes Virt...**: Each summer, alumni, faculty, staff and friends of the Swanson School of Engineering tee off to benefit the Swanson School's general scholarship fund. This year, the... [view more...](#)

A "VIEW ALL" button is located at the bottom right of the featured articles section. Below this, a banner for "NEW myPitt IS HERE!" encourages users to "LEARN ABOUT THE CHANGES" at pitt.mypitt. The "Student, Faculty, and Staff Resources" section includes links to:

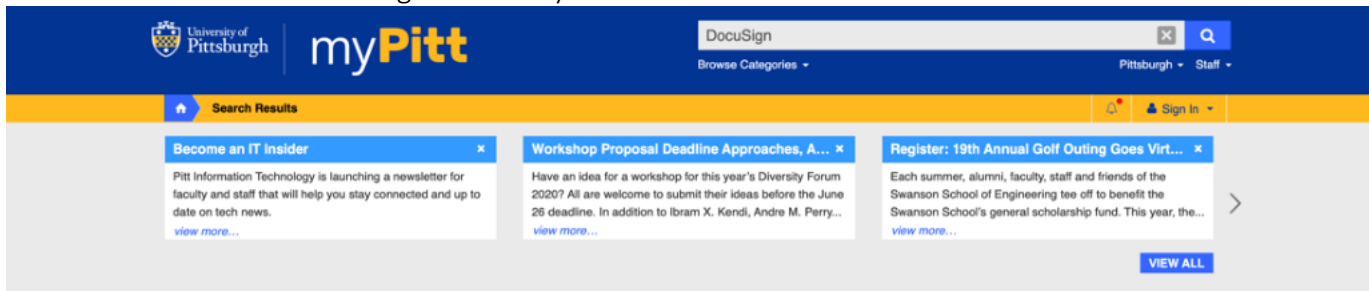
- Remote Learning, Teaching, and Work Res... (All Campuses)
- Student Services (All Campuses)
- Faculty Services (All Campuses)
- Staff Services (All Campuses)

The "Most Popular" section is partially visible at the bottom.

You can then search for DocuSign by typing "DocuSign" into the search box at the top of the screen.



You will be shown the following results on your screen.

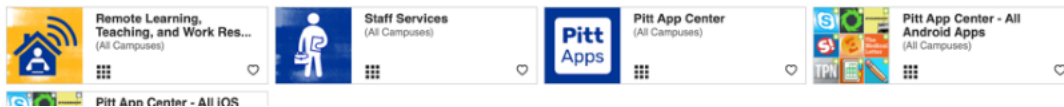


Search Results: Tasks

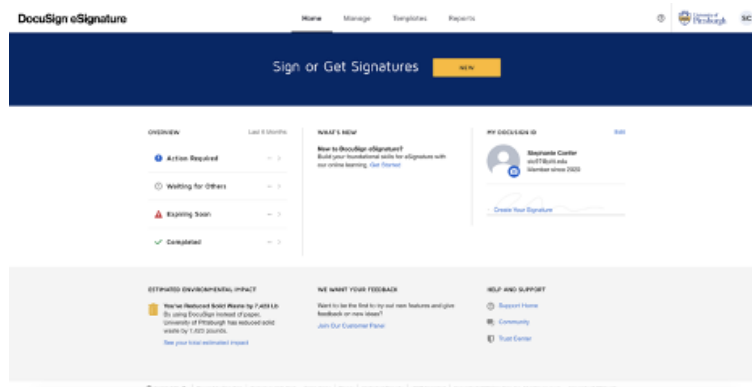
Clear Filters Back



Search Results: Task Centers



Click on the “DocuSign” icon box to be taken to the DocuSign landing page seen in the image below. You can also connect to DocuSign through the following link: <https://account.docusign.com/organizations/9261a3eb-689a-4036-bbcd-6c0d1311b040/saml2/login/sp/ff0e96ab-ff1b-4c75-8f7f-bf9c5762d9a4>



3. With DocuSign open in one tab, in another tab on your browser, visit the Global Operations Support-International Partnership Agreements page using the following link. We will return to

DocuSign later in this document. The link to the Global Operations Support-International Partnership Agreements page is:

<https://globaloperations.pitt.edu/international-agreements/>

4. Once you have familiarized yourself with the International Agreements page, select “Get Started”

The screenshot shows the University of Pittsburgh Global Operations Support website. The header includes the University of Pittsburgh logo, a search bar, and navigation links like "Pitt Home", "Find People", and "my.pitt.edu". Below the header is a navigation menu with categories: Travel, Research, Buying & Paying, Business Operations, International Agreements (highlighted), Hosting International Delegations, Provider Services, and Study Abroad Programs. The main content area is titled "International Partnership Agreements" and includes an "Overview" section. The overview text states that the University partners with academic institutions across the globe to expand curricular offerings, research collaborations, and intercultural opportunities for mobility of students and faculty. It references the "University of Pittsburgh Policy 02-01-05" and describes the process for establishing and renewing agreements with international institutions. A quote from the policy is included: "...any agreement 1) between the University of Pittsburgh and one or more foreign governments and/or universities or other organizations domiciled outside the United States, regarding the use of this University's faculty, student, library or other research or instructional resources within the United States or 2) that commits the University of Pittsburgh to the deployment of faculty, student, library or other research or instructional resources outside of the United States." Below the quote, it states that those wishing to host visitors (who are not part of an existing Exchange Agreement) and are uncertain if a Visitors Agreement is required, should refer to the Pitt Academic Visitors web-page hosted by the Office of Trade Compliance. Faculty and administrators considering an international inter-institutional agreement should follow the steps listed below. A call-to-action box asks "Familiar with the International Partnership Agreement process? Access the Partnership Agreement Request Form directly." and features a large blue arrow pointing to a "Get Started" button. Below this is a section titled "Agreement Process Chart" with a decorative background of dots.

5. Once you select “Get Started,” you will be prompted with a series of questions. The questionnaire will require that you have:

- Consulted your dean or department chair
- Confirmed that you possess a DocuSign account
- Gathered the institutional and personal contact information for the parties responsible for this agreement both at home and abroad.

All of your answers to the questionnaire must be yes to continue.

If your response to one or more of the answers to this questionnaire are ‘no’, then please reach out to the Director of Global Partnerships and Partner Engagement, Garrett Margliotti, via email at: g.margliotti@pitt.edu for assistance on how best to move forward.

6. Once your answers to the questionnaire are all yes, you will be able to select “Start your partnership agreement.”

Please note: Any questions about this form or how to complete it should be directed to the Global Operations Support Manager, Ian McLaughlin, via email at: ian.mclaughlin@pitt.edu.

Are you ready to request a partnership?

Have you talked to your department chair or dean about your partnership agreement?

☒ Yes ☐ No


Have you verified that you have a Pitt-supplied DocuSign profile?

☒ Yes ☐ No

Have you gathered the institutional and personal contact information for the parties who are responsible for the partnership, both at Pitt and abroad?

☒ Yes ☐ No


Great! You are all set.

 **Start your partnership agreement**

[Reset Questionnaire](#)

Close

- When you click "Start your partnership agreement" you will be taken, depending on your permissions, to either the Contraxx "My Dashboard" screen seen below or the "Routing Form" dashboard, also seen below.



My Dashboard

Welcome, Stephanie Confer

Logout

Create

Search

Reports

Settings

Refresh

Routing Forms Pending Approval

Institution Name	Responsibility Center	Department	Requestor	Request Date
Agency for the Assessment & Application of Technology (BPPT)	GSPIA (25)	GSPIA-Deans Office (25008)	Louise Comfort	10/03/2019
Association for Asian Studies, Inc	UCIS (51)	Asian Studies Center	Joseph Alter	06/08/2020
Bristol Borough	Sponsored Research (46)	Research Development Fund (10025)	Jordan Marion	06/16/2020
Capital Medical University	Nursing (32)	Nurs-Dean, Office of the (32010)	William Greene	03/03/2020
Department of Zoology, University of Calcutta	GSPH (34)	GSPH-Dean, Office of the (34010)	Joanne Russell	01/17/2019
First Affiliated Hospital of Zhejiang	UCIS (51)	Asian Studies Center	James Cook	06/11/2019

Routing Forms Approved

Institution Name	Responsibility Center	Department	Requestor	Request Date
Addev Materials	UCIS (51)	European Studies Center	Allyson Delnore	11/07/2019
Alma Mater Studiorum University of Bologna	Kenneth P. Dietrich School of Arts & Sciences (06)		Jana Iverson	08/29/2018
Birkbeck College, University of London	Kenneth P. Dietrich School of Arts & Sciences (06)	Film Studies (12225)	Lisa Lang	05/22/2020
Cape Peninsula University of Technology (CPUT)	Swanson School of Engineering (23)	Engr-Assistant Dean for Diversity (23015)	Diane Saran	10/29/2019
Chosun University	Kenneth P. Dietrich School of Arts &	English Language Institute (12312)	Robert Mucklo	03/19/2019

My In-Process Contracts

No records returned

My Expiring Contracts (within 90 days)

Company Name	Contract #	Agreement Type	Expiration Date	Term Type	Status
Ministry of Public Administration and Security Human Resource Development Bureau	UCIS-157.05	Amendment	05/31/2020	Fixed	Past Expiration
National Taiwan University Office of International Affairs	UCIS-763.00	Master	09/30/2020	Fixed	Active


My Open Tasks

No records returned

Last Visited Contracts

Company Name	Contract #	Agreement Type	Responsibility Center	Department
Kong and Allan Group LLC (The Asia Institute)	UCIS-1187	Scope of Services	UCIS (51)	Study Abroad Office
Kong and Allan Group LLC (The Asia Institute)	UCIS-909.00	Master	UCIS (51)	
ICFAL University	UCIS-1724	Master	Law (24)	CILE-LLM Program (24220)

Routing Form Dashboard:



UCIS Routing Forms

Welcome, Stephanie Confer

Logout

My International Routing Forms

No records returned


Create New International Agreements Approval Form

(UCIS) Admin Dashboard

Contraxx is unavailable due to maintenance on Thursday evenings between 9 pm and 9:30 pm EST

User Name: STC97

Saturday, July 25, 2020 11:24 AM

Powered by Contraxx from 

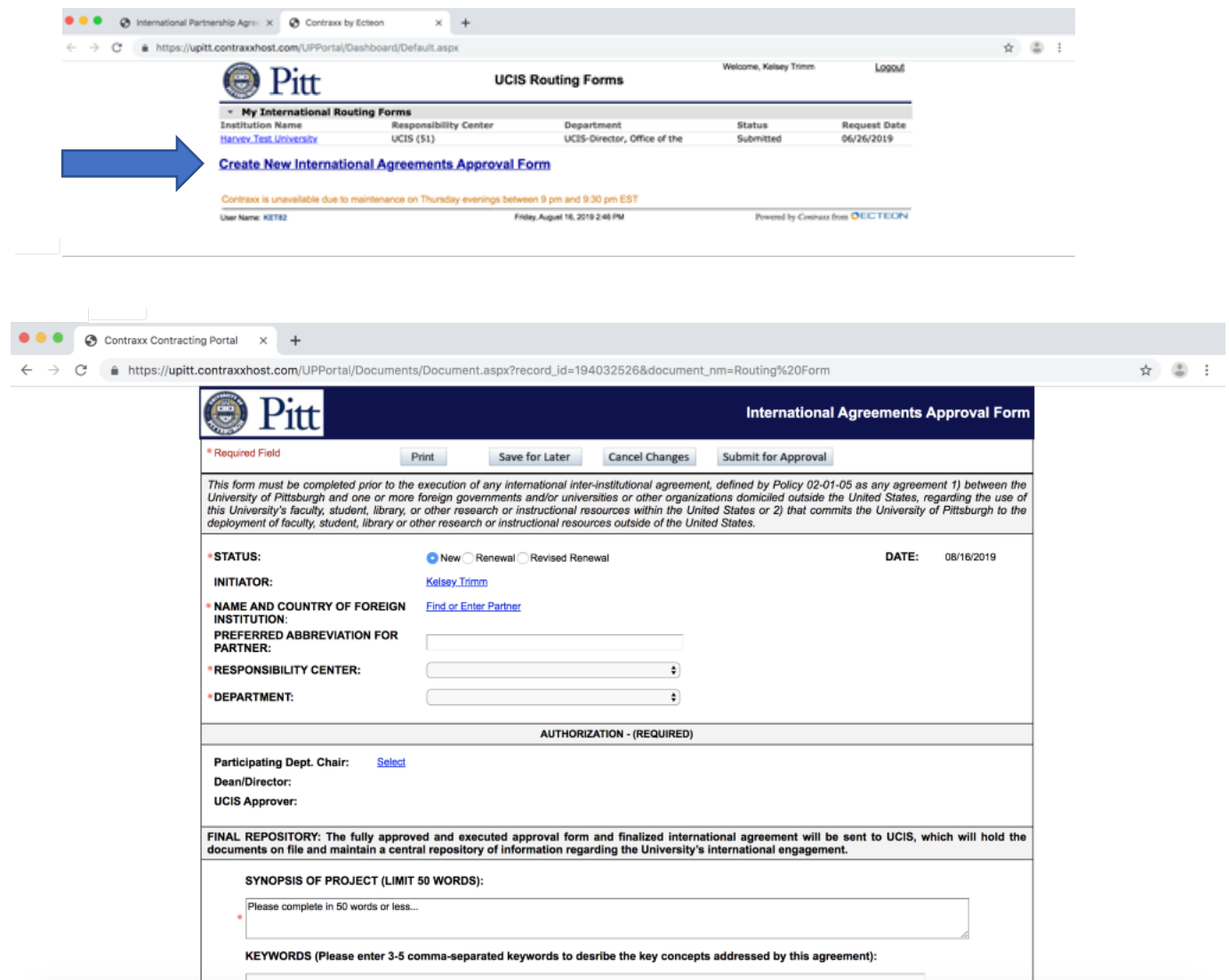
You will need to be on the Routing Form Dashboard to complete this process, so if you are on the Contraxx "My Dashboard" page, simply scroll down to the bottom of your screen and you will see in the right-hand corner the text "Routing Form Dashboard". Click the text and you will be taken to the correct screen.



8. Once you are on the “UCIS Routing Forms” screen, you will see any previous contracts you’ve submitted as well as a link to “create new international agreement approval form.” Note the other information provided to you on this page, including the status and request date of your routing form(s).

To access this page any time, visit: <https://upitt.contraxxhost.com/UPPortal/Dashboard/Default.aspx>

9. Now click on the link to “Create New International Agreements Approval Form”. Your browser will redirect to a blank approval form. You will now need to fill in the required information, indicated by a red asterisk.



The image shows two screenshots of the University of Pittsburgh's UCIS Routing Forms system. The top screenshot is the dashboard, and the bottom screenshot is the approval form.

UCIS Routing Forms Dashboard:

- Header: Pitt, UCIS Routing Forms, Welcome, Kelsey Trimm, Logout
- Section: My International Routing Forms
- Table:

Institution Name	Responsibility Center	Department	Status	Request Date
Harvey Test University	UCIS (51)	UCIS-Director, Office of the	Submitted	06/26/2019

- Link: [Create New International Agreements Approval Form](#)
- Message: Contraxx is unavailable due to maintenance on Thursday evenings between 9 pm and 9:30 pm EST
- User Name: KEST82, Friday, August 16, 2019 2:48 PM, Powered by Contraxx from ECTEON

International Agreements Approval Form:

- Buttons: Print, Save for Later, Cancel Changes, Submit for Approval
- Text: This form must be completed prior to the execution of any international inter-institutional agreement, defined by Policy 02-01-05 as any agreement 1) between the University of Pittsburgh and one or more foreign governments and/or universities or other organizations domiciled outside the United States, regarding the use of this University's faculty, student, library, or other research or instructional resources within the United States or 2) that commits the University of Pittsburgh to the deployment of faculty, student, library or other research or instructional resources outside of the United States.
- Form Fields:
 - * STATUS: ☒ New ☐ Renewal ☐ Revised Renewal, DATE: 08/16/2019
 - INITIATOR: Kelsey Trimm
 - * NAME AND COUNTRY OF FOREIGN INSTITUTION: Find or Enter Partner
 - PREFERRED ABBREVIATION FOR PARTNER: [Text Box]
 - * RESPONSIBILITY CENTER: [Dropdown]
 - * DEPARTMENT: [Dropdown]
- AUTHORIZATION - (REQUIRED)
 - Participating Dept. Chair: Select
 - Dean/Director: [Text Box]
 - UCIS Approver: [Text Box]
- FINAL REPOSITORY: The fully approved and executed approval form and finalized international agreement will be sent to UCIS, which will hold the documents on file and maintain a central repository of information regarding the University's international engagement.
- SYNOPSIS OF PROJECT (LIMIT 50 WORDS):
 - Please complete in 50 words or less... [Text Box]
- KEYWORDS (Please enter 3-5 comma-separated keywords to describe the key concepts addressed by this agreement): [Text Box]

Please note that you can save your progress at any time and return to continue at any point in the process. There is no pressure to submit after your first pass through adding the information. You may click “Save for Later” and come back to confirm or check through any details before continuing or submitting for approval.

10. The first required field is the “status” of the international agreement: new, renewal, or revised renewal.

New indicates that the request is for a new agreement, meaning it will likely be the master document as opposed to a renewal or a revised renewal which would be a new agreement’s child contract

Renewal indicates that the request is for an agreement that is being renewed from a previous original agreement. Often the original agreement will be labelled a master document and this renewal will be its child document.

Revised renewal indicates that the request for an amendment to an existing agreement during the current effective dates of the agreement.

Select the correct status related to your agreement.


11. If you selected a “renewal” or “revised renewal,” you will be asked to search for the original contract using the “contract search” portal.

University of Pittsburgh and one or more foreign governments and/or universities or other this University’s faculty, student, library, or other research or instructional resources within deployment of faculty, student, library or other research or instructional resources outside c

* **STATUS:** ☐ New ☒ Renewal ☐ Revised Renewal

ORIGINAL CONTRACT: [Search](#)

For both the “renewal” and a “revised renewal” options, you will need to search for the original contract. Therefore, click “search”. When you click “search” you will be taken to the following screen:

 **Contract Search**

Company Name:	<input type="text"/>	Contract Number:	<input type="text"/>
Contract Summary:	<input type="text"/>	Status:	<input type="text"/>
Agreement Type:	Click to Select	Responsibility Center:	<input type="text"/>
Department:	<input type="text"/>	Manager/Specialist:	<input type="text"/>


Depending on the information that you have, you will approach the searching process in a number of different ways, all of which are outlined below.

a. If you have the Contract Number of the master agreement, you can search by that criteria to find the correct contract.


i. Begin by typing the contract number into the “Contract Number” search field and click “search”.

Contract Number:
Status:

- ii. Select the contract that appears in the search results. The information will be added to the contract form and you can move forward to the next step (step 12).
- b. If you do not have the contract number, but you have the company/institution name, you can search by that criteria.
 - i. Type the name of the company/institution into the “Company Name” search field and click “search”. The results should display companies/institutions with the name that you searched for.

 **Company Name:**

- ii. Once you click search, your search results will look similar to this:
**Note: For these steps and some additional steps below, the University of Guanajuato will be used as an example rather than the test sample called “Harvey Test University” as the University of Guanajuato will give a more accurate representation of what you will see and encounter when you view these screens on your end when you are working through this process.*

 **Contract Search**

Company Name: **Contract Number:**
Contract Summary: **Status:**
Agreement Type: [Click to Select](#) **Responsibility Center:**
Department: **Manager/Specialist:**

Showing results 1-5 of 5 (Page 1 of 1)

Company Name	Contract Number	Contract Summary	Status	Agreement Type	Responsibility Center
University of Guanajuato	UCIS-936.00	Master	Active	Master	UCIS (51)
University of Guanajuato	UCIS-482.00	Memorandum of Understanding between The University of Pittsburgh Center for Global Health and Universidad de Guanajuato Division of Health Sciences	Expired	Master	GSPH (34)
University of Guanajuato	UCIS-116.01	Master	Expired	Master	Greensburg (42)
University of Guanajuato	UCIS-116.00	Master	Expired	Master	Greensburg (42)
University of Guanajuato	UCIS-1712	MOU	Active	Master	UCIS (51)

Legend: ☐ In Process/On Hold ☐ Terminated/Expired ☐ Past Expiration

Please note that names of institutions, etc. can often be misspelled, or listed improperly under an alternate name. If you are not sure which contract is the master agreement, you will need to verify that you are choosing the correct master agreement by the following steps:

This portal will not allow you to search through the listings. Once you click on one of the contracts, it will be added to your contract form.

Before clicking on an option:

- Note the Responsibility Center of the agreements. If you know that the master agreement was created through a particular Responsibility Center, this will help narrow down your options.
- Note the status of the agreements listed. If you know that the master agreement is still active, this will help narrow down your options as well.

To be absolutely certain, however, you will need to take the following steps:

- Click on the option that you believe matches most closely to the master agreement you are looking for.
- It will be added to your contract form as seen in the image below:

deployment of faculty, student, library or other research or instructional resources outside of

***STATUS:**

☐ New ☒ Renewal ☐ Revised Renewal

ORIGINAL CONTRACT:

UCIS-936.00 ✖

- Click on the “original contract” field to view the contract. Once you click on the number, you will be taken to the following screen:

UCIS-936.00 / University of Guanajuato / Master (Active) * required field

Contract Profile | **Clauses** | Documents | Journal | Workflow

Save | Save and Close | Cancel | Recycle | Assign Contract | Inactivate | Print | Audit On

Routing Form:

Contracting Party:* [University of Guanajuato](#) [Add Additional Parties](#)

Contracting Group:* UCIS

Contracting Sub- Group:* UCIS

Contract Form:* Master

Contract Type:* Undergraduate Exchange Agreement

Responsibility Center:* UCIS (51)

Department: Study Abroad Office

Child Contract?

Contract Number: UCIS-936.00

Legal Entity:* [University of Pittsburgh - Of the Commonwealth System of Higher Education](#)

Contract Summary:* Master

Legacy Contract #: 936.00

Record Type:* Data capture only

[Reload Scenario](#)

Contract Specific Information

Keywords

University of Pittsburgh Party:* Study Abroad Office

Participating Domestic Institutions:*

Participating Foreign Institutions:* University of Guanajuato

Synopsis of Project:* This is an international exchange agreement whereby each institution shall admit two full-time undergraduate students for one full academic year

Type of Agreement:* Framework/General Agreement

Duration:* 5 Years

Under what conditions (if any) can the agreement be terminated? Agreement may be terminated by either party upon written notification duly signed by an authorized official of the notifying party. Such notice of termination must be received by the other party no later than January 31 of the year in which termination becomes effective.

- d. Read through the information listed on the contract profile verifying that the contracting party, type of agreement, and dates of the agreement align with the information you have for the master agreement.
- e. Next, go to the “Documents” tab to view the agreement attached to this contract.

UCIS-936.00 / University of Guanajuato / Master (Active) * required field

Contract Profile | **Clauses** | Documents | Journal | Workflow

Save | Save and Close | Cancel | Create Base Draft | Create Full Draft | New Document | Submit to DocuSign | Print

File Name	Document Type	Description / Version	Uploaded By/On
University of Guanajuato - Undergrad Exchange Agreement - 2017.pdf	Executed Contract		07/02/2017

File Name	Document Type	Description / Version	Uploaded By/On
University of Guanajuato-MOU & Undergrad Exchange-Routing- 2017.pdf	Routing Form		07/02/2017

- f. You can click on either the agreement or the routing form to view information on the agreement. It is recommended that you begin with the agreement so you may verify that the agreement is the master agreement you are searching for.
- g. If you are still unsure, you can look at the contract’s contracting party and view all other contracts associated with the contracting party. To do this, go back to the

“Contract Profile” by clicking “Contract Profile” on the main navigation. You will be taken back to the following screen:

UCIS-936.00 / University of Guanajuato / Master (Active) * required field

Contract Profile | Clauses | Documents | Journal | Workflow

Save | Save and Close | Cancel | Recycle | Assign Contract | Inactivate | Print | Audit On

Routing Form:

Contracting Party:* [University of Guanajuato](#) [Add Additional Parties](#)

Contracting Group:* UCIS

Contracting Sub-Group:* UCIS

Contract Form:* Master

Contract Type:* Undergraduate Exchange Agreement

Responsibility Center:* UCIS (51)

Department: Study Abroad Office

Child Contract?

Contract Number: UCIS-936.00

Legal Entity:* [University of Pittsburgh - Of the Commonwealth System of Higher Education](#)

Contract Summary:* Master

Legacy Contract #: 936.00

Record Type:* Data capture only

[Reload Scenario](#)

Contract Specific Information

Keywords

University of Pittsburgh Party:* Study Abroad Office

Participating Domestic Institutions:*

Participating Foreign Institutions:* University of Guanajuato

Synopsis of Project:* This is an international exchange agreement whereby each institution shall admit two full-time undergraduate students for one full academic year

Type of Agreement:* Framework/General Agreement

Duration:* 5 Years

Under what conditions (if any) can the agreement be terminated by either party upon written notification duly signed by an authorized official of the notifying party. Such notice of termination must be received by the other party no later than January 31 of the year in which termination becomes effective.

h. Click on the “contracting party” at the top of the screen.

Routing Form:

Contracting Party:* [University of Guanajuato](#)

Contracting Group:* UCIS

i. You will be taken to the following screen:

University of Guanajuato (Verified) * required field

Company Profile Associates Documents Journal Contracts

Save Save and Close Cancel New Contract Recycle Communicate Company Change Assign Contracts Print Audit On

Contracting Party Name:* University of Guanajuato

Country:* Mexico

Address Line 1:* Lascaráin de Retana No. 5, Col. Centro C.

Address Line 2:

City:* Guanajuato

State/Province: Gto

Zip/Postal Code:* 36000

Phone Number: (+52) 473 732 00 06

Fax Number:

Web Address: https://www.ugto.mx/en/

Contracting Party Type: ☐ Supplier/Vendor ☐ School/Department ☒ Institution

Status:* Verified

Tax ID #:

DUNS #:

Contracting Party Description:

Additional Contracting Party Names

Name	Name Type	Name Effective	Description
------	-----------	----------------	-------------

Additional Addresses

Contracting Group	Location Type	Address
-------------------	---------------	---------

Relationships

Contracting Party Name	Relationship Type	Description
------------------------	-------------------	-------------

j. Verify that the address and information matches the information that you have for the institution you are working with. If the information does not look accurate, you may not have the correct contracting party. (Note, if this information is indeed inaccurate and needs updated, please reach out to the Administrative Assistant for Global Partnerships and Events, Stephanie Confer, at stc97@pitt.edu, who will take the proper actions to have the information updated.)

k. Next, click on “Contracts” in the main navigation. You will be taken to the following screen:

University of Guanajuato (Verified) * required field

Company Profile Associates Documents Journal Contracts

Save Save and Close Cancel New Contract Print Audit On

Document Number	Document Type	Summary	Effective Date	Expiration Date
UCIS-936.00	Master	Master	23-Jan-2017	22-Jan-2022
UCIS-482.00	Master	Memorandum of Understanding between The University of Pittsburgh Center for Global Health and Universidad de Guanajuato Division of Health Sciences	21-Dec-2012	20-Dec-2014
UCIS-116.01	Master	Master	01-Sep-2010	31-May-2014
UCIS-116.00	Master	Master	28-Jun-2000	27-Jun-2004
UCIS-1712	Master	MOU	17-Mar-2017	16-Mar-2022

Legend: In Process/On Hold Terminated/Expired Past Expiration

- l. From here you will be able to view each contract listed under this contracting party to verify that the master agreement you have selected is indeed correct.
- m. Click on another “document number” to view another contract that you would like to view. Follow the steps above to read the contract’s documentation.
- n. Once you are satisfied that the agreement you have chosen is the correct master agreement, return back to the contract form page. This will still be a tab on your browser. Note: If you have questions or you are concerned about selecting the correct master agreement, please reach out to the Director of Global Partnerships and Partner Engagement, Garrett Margliotti, at g.margliotti@pitt.edu.
- o. Your contract form will now look like this:

International Agreements Approval Form

* Required Field

Print Save for Later Cancel Changes Submit for Approval

This form must be completed prior to the execution of any international inter-institutional agreement, defined by Policy 02-01-05 as any agreement 1) between the University of Pittsburgh and one or more foreign governments and/or universities or other organizations domiciled outside the United States, regarding the use of this University's faculty, student, library, or other research or instructional resources within the United States or 2) that commits the University of Pittsburgh to the deployment of faculty, student, library or other research or instructional resources outside of the United States.

* STATUS: ☐ New ☒ Renewal ☐ Revised Renewal DATE: 07/25/2020

ORIGINAL CONTRACT: UCIS-936.00 ✖

INITIATOR: Stephanie Confer

* NAME AND COUNTRY OF FOREIGN INSTITUTION: Find or Enter Partner

PREFERRED ABBREVIATION FOR PARTNER:

* RESPONSIBILITY CENTER:

* DEPARTMENT:

AUTHORIZATION - (REQUIRED)

Participating Dept. Chair: Select

Dean/Director:

UCIS Approver:

FINAL REPOSITORY: The fully approved and executed approval form and finalized international agreement will be sent to UCIS, which will hold the documents on file and maintain a central repository of information regarding the University's international engagement.

SYNOPSIS OF PROJECT (LIMIT 50 WORDS):

* Please complete in 50 words or less...

KEYWORDS (Please enter 3-5 comma-separated keywords to describe the key concepts addressed by this agreement):

III. PARTIES TO THE AGREEMENT:

Include unit name, Principal Investigator or project contacts, address, phone, fax, e-mail. List as many units as applicable.

A. University of Pittsburgh

- p. You can now move onto step 12 to continue completing the rest of the form.

12. The next required field is the “Name and country of foreign institution.”

INITIATOR: Stephanie Confer

* NAME AND COUNTRY OF FOREIGN INSTITUTION: Find or Enter Partner

PREFERRED ABBREVIATION FOR PARTNER:

Select “Find or Enter Partner” to begin a contracting party search—you’ll be redirected to the search function in Contraxx seen in the image below. Type in the name of the institution in the “party name” field and click “search”.

Contracting Party Search

Party Name:
City:
Country:
Search options...

Address:
State/Province:
Contract Count: From To
Search Cancel

Contracting Party Search

Party Name:
City:
Country:
Search options...

Address:
State/Province:
Contract Count: From To
Search Cancel

Showing results 1-1 of 1 (Page 1 of 1)

Party Name	Address	City	State/Province	Country	Contract Count
University of Guanajuato	Lascuráin de Retana No. 5, Col. Centro C.P.	Guanajuato	Gto	Mexico	5

Page 1 of 1

Export options... Enter New Contracting Party

13. If your contracting party is **not** already in the system, you will need to enter a new contracting party.

- i. In order to enter a new contracting party, you will first need to type the name of the institution into the field in the steps above.
- ii. Click “search”
- iii. You will then come to the following screen:

Contracting Party Search

Party Name:
City:
Country:
Search options...

Address:
State/Province:
Contract Count: From To
Search Cancel

Showing results 1-1 of 1 (Page 1 of 1)

Party Name	Address	City	State/Province	Country	Contract Count
University of Guanajuato	Lascuráin de Retana No. 5, Col. Centro C.P.	Guanajuato	Gto	Mexico	5

Page 1 of 1

Export options... Enter New Contracting Party

- iv. Click on “Enter New Contracting Party”, which can be seen at the bottom of the search results, as seen above.
- v. You’ll be redirected to the following entry form where you will need to enter the information of the contracting party. This will be outlined below.

Contracting Party Profile * required field

Save Save and Close Cancel Print Audit On

Contracting Party Name:

Country:

Address Line 1:

Address Line 2:

City:

State:

Zip Code:

Phone Number:

Fax Number:

Web Address:

Contracting Party Description:

Contracting Party Type: ☐ Supplier/Vendor ☐ School/Department ☐ Institution

Status: ☐ Requested

Tax ID #:

Minority Business? ☐ Yes ☐ No

DUNS #:

Additional Contracting Party Names +

Name	Name Type	Name Effective	Description
------	-----------	----------------	-------------

Additional Addresses +

Contracting Group	Location Type	Address
-------------------	---------------	---------

Relationships +

Contracting Party Name	Relationship Type	Description
------------------------	-------------------	-------------

Note: When entering your party into the system, do so at the highest level.

For example, if one were partnering with GSPIA at Pitt, the correct entry for the party would be “University of Pittsburgh” – not GSPIA – because it represents the institution at the highest level.

vi. On this screen you should fill out, when possible, all of the fields that are listed below. Be sure to Google and verify that the information you are adding to this form is accurate. Make sure to check spelling and typos before leaving this form.

vii. Start by choosing the “Contracting Party Type”. The three options are: supplier/vendor, school/department, and institution.

a. Supplier/Vendor – This is when you partner with an entity other than a foreign institution.

b. School/Department – This is the department or school within the institution. If you are creating or partnering with “Graduate School of International Studies at University of Hong Kong”, you would choose this.

c. Institution – You choose this when it is the highest level with the entity you are partnering with. This would be the “University of Sydney” but NOT “College of Humanities at the University of Sydney”

d. Note: Please be aware that the default country is “United States” so this will need to be changed to the respective country.

viii. If you are filling this form out for school/department then you will need to indicate the institution that this school/department is connected to. This will be outlined below in step 13, xi.

If you are filling this out for an institution, complete the following steps:

- ix. Add the Contracting Party Name. This is the name of the institution Pitt is partnering with. Be sure to verify that you have correctly written the institution's name. Example: "University of Sydney" or "Mexican Ministry of Foreign Affairs"
- x. Note that the "status" of this Company Profile is marked automatically as "requested". This will be changed to "verified" once this Company Profile has been reviewed and verified.
- xi. Then, fill out the following information:
- Country- this is the country where the institution is located.
 - Address- this is the address where the institution is located.
 - City- this is the city where the institution is located.
 - State- if applicable, provide the state where the institution is located.
 - Zip Code- if applicable, provide the zip code where the institution is located. If the institution does not have a zip code, simply add "xxxxxx" to the required field.
 - Phone Number- if possible, find the phone number for the institution. This can often be found on the institution's website.
 - Web Address- provide the web address of the institution.
- xii. If you are filling this form out for a school/department you will need to indicate what the institution is. You will notice when you click "school/department" a new line will appear "Institution: click to select".

* required field

Journal | **Contracts**

Audit On

Contracting Party Type: ☐ Supplier/Vendor ☒ School/Department ☐ Institution


Institution: [Click to Select](#)

Status:* Requested ▼

Tax ID #:

DUNS #:

- xiii. Press the "click to select" option to select the Institution. You will be taken to the following screen:

 **Pitt**

Contracting Party Search

Party Name:

City:

Country: ▼

Address:

State/Province:

Contract Count: From To

[Search options...](#)

- xiv. Type in the name of the institution and from the search results select the institution.

Note: It is important to note here that if the institution does not currently exist in the records, you will need to “Enter New Contracting Party” for the institution as well as for the school/department so the two can be linked. If you need to create a new contracting party for the institution as well, click “Enter New Contracting Party” at this step and enter the institution into the records as a new contracting party following the same steps as above for all of the required fields- e.g. the name of the contracting party, address, etc., but making sure to mark the “contracting party type” as institution instead of department/school. This process is outlined in steps 13 vii-x above.

Contracting Party Search

Party Name: Address:

City: State/Province:

Country: Contract Count: From To

Showing results 1-1 of 1 (Page 1 of 1)

Party Name	Address	City	State/Province	Country	Contract Count
University of Guanajuato	Lascarán de Retana No. 5, Col. Centro C.P.	Guanajuato	Gto	Mexico	5

Page 1 of 1

- xv. Once you click on the Institution, it will be added to the Company Profile form. You can now begin to fill out the rest of the Company Profile.
- xvi. Note that the “status” of this Company Profile is marked automatically as “requested”. This will be changed to “verified” once this Company Profile has been reviewed and verified. This task will be completed by the Director of Global Partnerships and Partner Engagement, Garrett Margliotti, or the Global Partnerships and Engagement team, not the initiator.

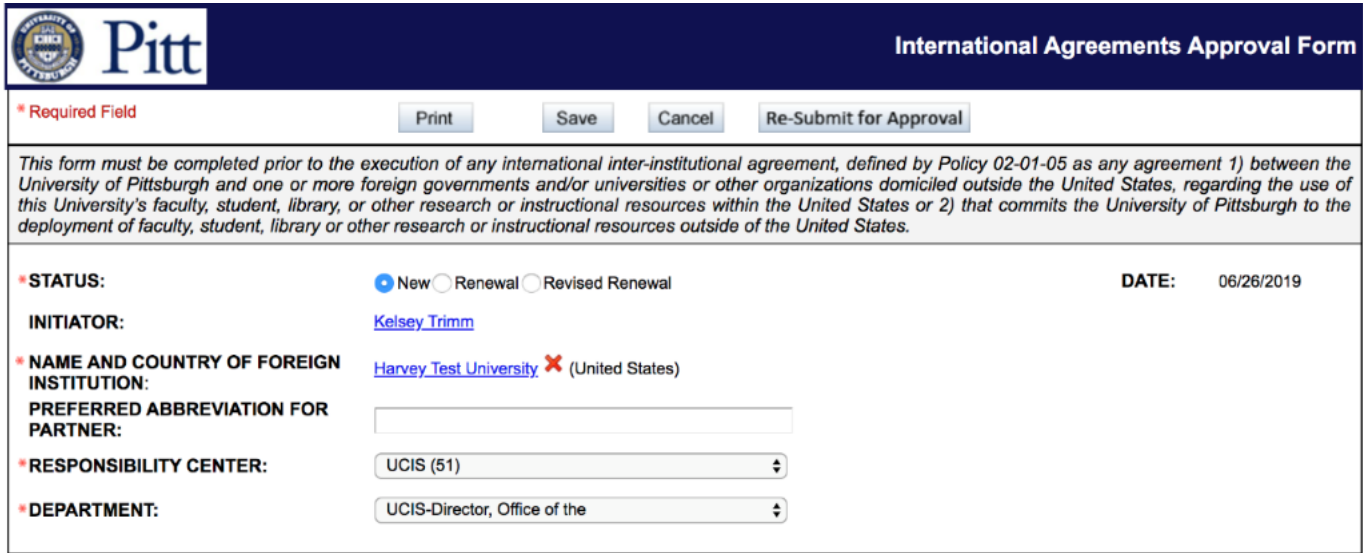
xvii. Add the Contracting Party Name. This is the name of the school/department Pitt is partnering with. Be sure to verify that you have correctly written the school/department's name.

xviii. Then, fill out the following information for the institution that the school/department is a part of:

- Country- this is the country where the institution is located.
- Address- this is the address where the institution is located.
- City- this is the city where the institution is located.
- State- if applicable, provide the state where the institution is located.
- Zip Code- if applicable, provide the zip code where the institution is located. If there is no zip code, simply add "xxxxxx" to the required field.
- Phone Number- if possible, find the phone number for the institution. This can often be found on the institution's website.
- Web Address- provide the web address of the institution.

Once you have finished adding the information into the Company Profile, be sure to click "save" and "save and close" to finish.

14. Once your party is selected or entered, it will auto-populate information onto the International Agreements Approval Form. Please ensure the information is correct.



International Agreements Approval Form

*** Required Field** [Print](#) [Save](#) [Cancel](#) [Re-Submit for Approval](#)

This form must be completed prior to the execution of any international inter-institutional agreement, defined by Policy 02-01-05 as any agreement 1) between the University of Pittsburgh and one or more foreign governments and/or universities or other organizations domiciled outside the United States, regarding the use of this University's faculty, student, library, or other research or instructional resources within the United States or 2) that commits the University of Pittsburgh to the deployment of faculty, student, library or other research or instructional resources outside of the United States.

*** STATUS:** ☒ New ☐ Renewal ☐ Revised Renewal **DATE:** 06/26/2019

INITIATOR: [Kelsey Trimm](#)

*** NAME AND COUNTRY OF FOREIGN INSTITUTION:** [Harvey Test University](#) ✗ (United States)

PREFERRED ABBREVIATION FOR PARTNER:

*** RESPONSIBILITY CENTER:**

*** DEPARTMENT:**

15. The next required field is the Pitt responsibility center and department. Use the dropdown menu to select accordingly.

16. You are required to complete the Authorization section. This includes information on the "Participating Dept. Chair," the dean/director, and the responsibility center approver. The Dean/Director and UCIS approver information will automatically populate on the page after you have completed the first section.

- The information entered here will feed into the future DocuSign "envelope."

17. You will have to enter the "Participating Dept. Chair." Choose "select" and you will be asked to look up your department chair using the Pitt address book. Enter their name into the "look up" box and click "find".

Address Book (Pitt)

Look for in

Last Name	First Name	Company
Confer	Stephanie	Pitt - UCIS

Buttons: Find, Add, Edit, Copy, Delete, Ok - Accept, Ok - Clear, Cancel

Select their name and click “edit” to see more information.
Ensure their e-mail matches your own records.

Edit Address Book Entry

Title: First: Last: Type: ☒ Active

Courtesy (Dear...):

P.K.A. - First: Last:

Company:

Street Address:

City: State / Province: EIN / Soc. Sec. #:

Zip / Postal Code: Country:

Note:

Phone 1: Phone 2: Fax: Email:

Buttons: Save, Cancel

If their information matches your records, select “save.”

Please be sure to note at this point whether the email address listed in the form on the right-hand side is accurate before moving forward. If it is not accurate, update the field with the correct email address.

18. After you click “save”, you will be taken back to the Address Book screen (pictured above).
Click “OK – Accept”.

19. Review the information once again as it is loaded into the International Agreements Approval Form.

AUTHORIZATION - (REQUIRED)		
Participating Dept. Chair:	Stephanie Confer, Pitt - UCIS (stc97@pitt.edu)	DocuSign Envelope: 8bbee2e7-21c7-4d28-a765-0af0de72b9c0 (Created)
Dean/Director:	Ariel C. Armony, University Center for International Studies (armony@pitt.edu)	Routing Form.doc
UCIS Approver:	Garrett Margliotti (gdm20@pitt.edu)	Stephanie Confer, Pitt - UCIS (Created) Ariel C. Armony, University Center for International Studies (Created) Garrett Margliotti (Created)

20. The “final repository” section provides information to your Chair, Dean and UCIS related to your agreement, which is kept in a central repository of University international agreements.

- Enter a synopsis of your agreement in 50 words or less. Please note that you may write more than 50 words even though the system states that you may only write 50 words or less.

FINAL REPOSITORY: The fully approved and executed approval form and finalized international agreement will be sent to UCIS, which will hold the documents on file and maintain a central repository of information regarding the University's international engagement.

SYNOPSIS OF PROJECT (LIMIT 50 WORDS):

Please complete in 50 words or less...

21. Enter “Parties to the Agreement” information. Be sure to include unit name, principal investigator or project contacts, and other information like addresses, phone numbers, faxes, and e-mails. List as many units as possible.

III. PARTIES TO THE AGREEMENT:

Include unit name, Principal Investigator or project contacts, address, phone, fax, e-mail. List as many units as applicable.

A. University of Pittsburgh

First Name	Last Name	E-mail	Phone	Fax	Mailing Address	Primary Contact?
						<input type="checkbox"/>

[Add Contact](#)

B. Participating Domestic Institutions (If any)

First Name	Last Name	E-mail	Phone	Fax	Mailing Address	Primary Contact?
						<input type="checkbox"/>

[Add Contact](#)

22. Enter information related to the “participating foreign institutions,” as applicable.

C. Participating Foreign Institutions

First Name	Last Name	E-mail	Phone	Fax	Mailing Address	Primary Contact?
						<input type="checkbox"/>

[Add Contact](#)

23. Select the “Type of Agreement” from the dropdown list.

IV. TYPE OF AGREEMENT:

*

The types of agreements are:

- Cooperative Program Agreement- allows units to partner with institutions abroad on matters not related to student/faculty exchange. For example, if Pitt is co-hosting any type of program or event abroad, not related to study abroad (such as conferences, film festivals, or publication launch), then we should formalize that arrangement using this agreement.
- Faculty Exchange (Non-Teaching) Agreement- supports faculty as they establish non-teaching collaborations with partners abroad (including formal mobility agreements, coordinating academic meetings, collaborating with international partners). Research projects should be discussed with the Office of Research and teaching contracts should be discussed with the Office of Faculty Affairs.
- Undergraduate and Graduate Exchange Agreements- supports individual student mobility (outside of Pitt-sanctioned study abroad program models) via a bilateral agreement where each partner is encouraged to send/receive equal numbers of students annually. Since students at each institution pay tuition to their home institutions, these agreements require careful thought and consideration, especially as regards the responsible unit’s ability to recruit and send/receive a set number of students annually. If there is a desired exchange at both the Graduate and Undergraduate levels, separate agreements may be required. Also, please note that Graduate exchanges will be administered through specific graduate schools.
 - i. Note: Undergraduate and Graduate Exchange Agreements are two separate options on this contract form so please select which option is most appropriate.
- Memorandum of Understanding (MOU)- is a standard, non-binding accord between institutions. It is used in cases where a ceremonial signing is required or when Pitt would like to establish an exploratory relationship with a partner to best decide whether more formal collaborations are warranted. In cases where parties agree on specific projects or scope of partnerships, the MOU should be avoided and one of the agreements above should be explored.
- Study Abroad Agreement- an agreement between Pitt and another partner institution or study abroad provider which allows for Pitt students to travel abroad to study in a foreign country

For help in determining the type of agreement you have, please reach out to the Director of Global Partnerships and Partner Engagement, Garrett Margliotti, at g.margliotti@pitt.edu.

24. If you have information related to the duration of the agreement, termination, and conditions for renewal, please enter them in the allotted spaces.

V. DURATION OF THE AGREEMENT, TERMINATION, AND CONDITIONS FOR RENEWAL:

A. Duration:

Please complete...

If possible: Starting Date: Ending Date:

B. Under what conditions (if any) can the agreement be terminated by one party prior to its ending date?

C. Does the agreement expressly provide for a possibility of renewal?

☐ Yes ☐ No

25. If you have information related to the University of Pittsburgh funds involved in this international agreement, please provide as much detailed information as possible.

VI. ARE UNIVERSITY OF PITTSBURGH FUNDS INVOLVED?

☐ Yes ☐ No

26. Select the "Submit for Approval" button at the bottom of the screen once you have entered and reviewed all the required information.

Please note that you can save your progress at any time and return to continue at any point in the process. There is no pressure to submit after your first pass through adding the information. You may click "Save for Later" and come back to confirm or check through any details before continuing or submitting for approval.

27. If you are missing any information, the following dialogue box will appear that informs you which required fields are missing. Ensure that the information is entered correctly and then resubmit.

The following required fields are missing:

- University of Pittsburgh Party->Answer
- Participating Foreign Institutions->Answer
- Type of Agreement->Answer
- Foreign Institution
- Responsibility Center

Ok

28. Once your information is completed and submitted, it will be sent for approval through DocuSign. DocuSign is a program that allows you to get signatures from the parties involved in your agreement.

*Contraxx will launch DocuSign through a pop-up, so make sure your pop-up blocker is not set to block the site otherwise you will need to click to “re-submit for approval”.

29. Once you click “submit for approval” or “re-submit for approval”, you will be taken to the following screen:

International Agreement approval required for Harvey Test University

RECIPIENT PREVIEW

NEXT

Add Documents to the Envelope

Routing Form.docx
2 pages

UPLOAD

USE A TEMPLATE

GET FROM CLOUD

Add Recipients to the Envelope

As the sender, you automatically receive a copy of the completed envelope.

ADD FROM CONTACTS

SIGNING ORDER

[Import a bulk list.](#) Send copies of this envelope to many people at once. ⓘ

☒ Set signing order

1

Name *

Stephanie Confer, Pitt - UCIS

Email *

stc97@pitt.edu

NEEDS TO SIGN

MORE

2

Name *

Ariel C. Armony, University Center for International Studie

NEEDS TO SIGN

MORE

SEND NOW

NEXT

30. On this screen you will see that a Routing Form has been created and below that under the “Add Recipients to the Envelope” header, the names and email addresses that were inputted under “Authorization” in Contraxx have been automatically inserted into the DocuSign fields- the participating department chair, dean/director, and UCIS Approver.

Add Recipients to the Envelope

As the sender, you automatically receive a copy of the completed envelope.

ADD FROM CONTACTS

SIGNING ORDER

[Import a bulk list.](#) Send copies of this envelope to many people at once.

☒ Set signing order

1	<p>Name *</p> <p>Stephanie Confer, Pitt - UCIS </p> <p>Email *</p> <p>stc97@pitt.edu</p>	<p> NEEDS TO SIGN ▼</p> <p>MORE ▼</p>
2	<p>Name *</p> <p>Ariel C. Armony, University Center for International Studie: </p> <p>Email *</p> <p>armony@pitt.edu</p>	<p> NEEDS TO SIGN ▼</p> <p>MORE ▼</p>
3	<p>Name *</p> <p>Garrett Margliotti </p> <p>Email *</p> <p>gdm20@pitt.edu</p>	<p> NEEDS TO SIGN ▼</p> <p>MORE ▼</p>

31. At this point, you can add your own custom message to all recipients under the “Message to All Recipients” header or send a custom message to one recipient or all recipients. Standard writing will automatically be inserted into the email message field once you arrive on this page, so you do not need to write individual messages if do you do not wish to do so.

<p>Message to All Recipients</p> <p><input type="checkbox"/> Custom email and language for each recipient</p> <p>Email Subject*</p> <p>International Agreement approval required for Harvey Test University</p> <p>Characters remaining: 32</p> <p>Email Message</p> <p>Stephanie Confer has started the process to create an agreement between the University of Pittsburgh and Harvey Test University. You are receiving this message because the workflow requires your approval before the proposal will be reviewed by the University Center for International Studies (UCIS) and the Office of General Counsel. Your prompt attention to this</p> <p>Characters remaining: 8699</p>	<p>Advanced Options Edit</p> <ul style="list-style-type: none"> Recipients can view documents more easily on mobile devices with responsive signing NEW Recipients can change signing responsibility Incomplete envelopes expire days after send date Recipients are warned day(s) before request expires Comments are enabled Senders can use either quick send or advanced edit
--	---

32. Once you are ready, click “next” at the bottom of the page.

SEND NOW

NEXT

33. You will be taken to the following screen.

International Agreement approval required for Harvey Test University

Stephanie Confer, Pitt - U...

79%

Search Fields

Standard Fields

- Signature
- Initial
- Date Signed
- Name
- Email
- Company
- Title
- Text
- Checkbox
- Dropdown
- Radio
- Payment Item
- Formula
- Attachment
- Note

International Agreements Approval Form

This form must be completed prior to the execution of any international inter-institutional agreement, defined by Policy 02-01-05 as any agreement 1) between the University of Pittsburgh and one or more foreign governments and/or universities or other organizations domiciled outside the United States, regarding the use of this University's faculty, student, library, or other research or instructional resources within the United States or 2) that commits the University of Pittsburgh to the deployment of faculty, student, library or other research or instructional resources outside of the United States.

NAME AND COUNTRY OF FOREIGN INSTITUTION: Harvey Test University (United States)

STATUS: New DATE: 08/07/2020

INITIATOR: Stephanie Confer

RESPONSIBILITY CENTER: UCIS (51)

DEPARTMENT: UCIS-Director, Office of the

AUTHORIZATION - (REQUIRED)

Participating Dept. Chair: Stephanie Confer, Pitt - UCIS

Dean/Director: Ariel C. Amory, University Center for International Studies

Director of UCIS: Garrett Margiotti

FINAL REPOSITORY: The fully approved and executed approval form and finalized international agreement will be sent to UCIS, which will hold the documents on file and maintain a central repository of information regarding the University's international engagement.

SYNOPSIS OF PROJECT (LIMIT 50 WORDS):

test

KEYWORDS (Please enter 3-5 comma-separated keywords to describe the key concepts addressed by this agreement):

III. PARTIES TO THE AGREEMENT:

Include unit name, Principal Investigator or project contacts, address, phone, fax, e-mail. List as many units as applicable.

A. University of Pittsburgh

First Name	Last Name	E-mail	Phone	Fax	Mailing Address	Primary Contact?
Stephanie	Confer	stc97@pitt.edu				No
Garrett	Margiotti	gd-m20@pitt.edu				No

B. Participating Domestic Institutions (if any)

First Name	Last Name	E-mail	Phone	Fax	Mailing Address	Primary Contact?
						No

C. Participating Foreign Institutions

Routing Form.doc

Pages: 2

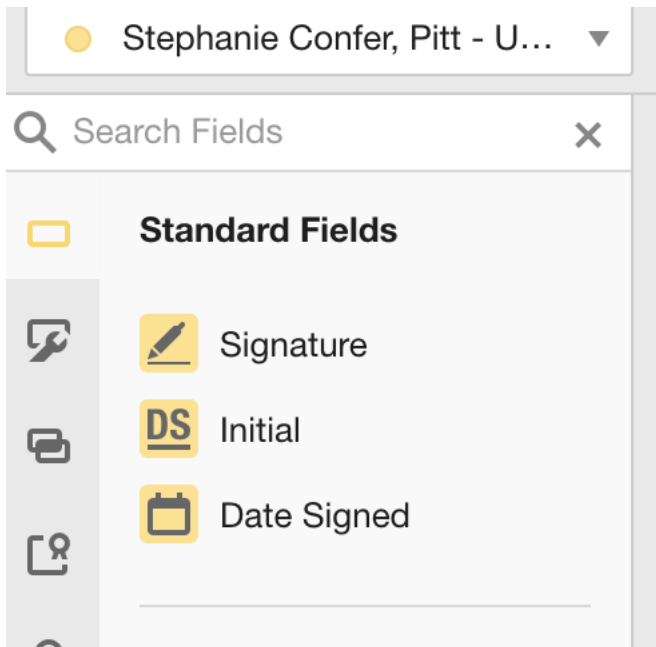
1

2

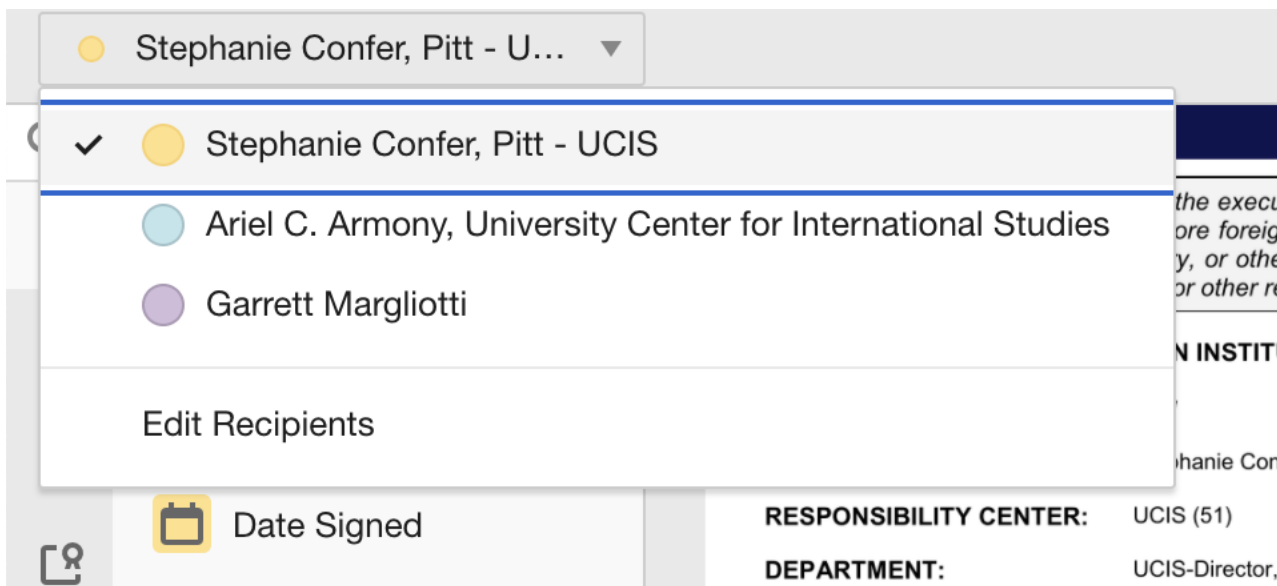
BACK

SEND

34. Next, you will add the Signature and Date Signed buttons next to each person's name.



As you will see when you click on the drop-down menu, each person is represented by their own color. Be sure to place stickers with matching colors next to each other on the document to ensure that the signature and date correspond to the same person.



35. Once you are finished, your screen should look like this:

International Agreement approval required for Harvey Test University

Garrett Margliotti

93%

RECIPIENT PREVIEW

SEND

Search Fields

Standard Fields

- Signature
- Initial
- Date Signed
- Name
- Email
- Company
- Title
- Text
- Checkbox
- Dropdown
- Radio
- Payment Item
- Formula
- Attachment
- Note
- Approve

International Agreements Approval Form

This form must be completed prior to the execution of any international inter-institutional agreement, defined by Policy 02-01-05 as any agreement 1) between the University of Pittsburgh and one or more foreign governments and/or universities or other organizations domiciled outside the United States, regarding the use of this University's faculty, student, library, or other research or instructional resources within the United States or 2) that commits the University of Pittsburgh to the deployment of faculty, student, library or other research or instructional resources outside of the United States.

NAME AND COUNTRY OF FOREIGN INSTITUTION: Harvey Test University (United States)

STATUS: New DATE: 08/07/2020

INITIATOR: Stephanie Confer

RESPONSIBILITY CENTER: UCIS (S1)

DEPARTMENT: UCIS-Director, Office of the

AUTHORIZATION - (REQUIRED)

Participating Dept. Chair: Stephanie Confer, Pitt - UCIS

Dean/Director: Ariel C. Armony, University Center for International Studies

Director of UCIS: Garrett Margliotti

DocuSign Envelope: 6973d234-4b11-4d5c-a4e3-18849c0f9e93 (Created)

FINAL REPOSITORY: The fully approved and executed approval form and finalized international agreement will be sent to UCIS, which will hold the documents on file and maintain a central repository of information regarding the University's international engagement.

SYNOPSIS OF PROJECT (LIMIT 50 WORDS):

test

KEYWORDS (Please enter 3-5 comma-separated keywords to describe the key concepts addressed by this agreement):

III. PARTIES TO THE AGREEMENT:

Include unit name, Principal Investigator or project contacts, address, phone, fax, e-mail. List as many units as applicable.

A. University of Pittsburgh

test

First Name	Last Name	Email	Phone	Fax	Mailing Address	Primary Contact?
Stephanie	Confer	stc97@pitt.edu				No
Garrett	Margliotti	gdm20@pitt.edu				No

B. Participating Domestic Institutions (If any)

First Name	Last Name	Email	Phone	Fax	Mailing Address	Primary Contact?
------------	-----------	-------	-------	-----	-----------------	------------------

Routing Form.doc 1 of 2

Save As Custom Field

Delete

BACK

SEND

36. Once you have completed adding the stickers to the proper locations on the document, you can click "send". After clicking "send", your document will be sent to the first recipient for approval.

BACK

SEND

37. You can now return to DocuSign at any point to check on the status of the signature approval process.

38. To access DocuSign, start by going to my.pitt.edu in your browser. (These steps are outlined above but are reiterated here for clarity.) Login to your account using your username and password if you are not already logged in.

The screenshot shows the 'Pitt Passport' login page. At the top is the University of Pittsburgh logo and the text 'Pitt Passport'. Below this are input fields for 'Username' (with a placeholder 'Enter username') and 'Password'. A yellow 'Submit' button is centered below the fields. Under the button are links for 'Forgot password?' and 'Need Help?'. Below these is a link for 'New Account Activation'. A yellow box contains 'Important Login Information' with instructions on how to use the portal, including a note about Safari browser settings and a warning to never share credentials. The background features a repeating pattern of the University of Pittsburgh crest.

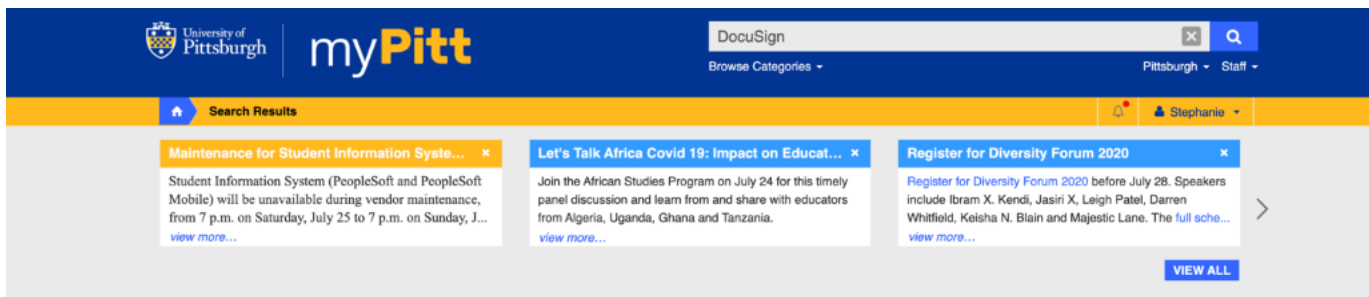
Once you have logged in you will be taken to the following screen:

The screenshot shows the 'myPitt' dashboard. At the top is the University of Pittsburgh logo and the 'myPitt' text. A search bar is on the right with the placeholder 'What would you like to find?'. Below the search bar are links for 'Browse Categories' and 'Pittsburgh - Staff'. A yellow bar at the top right shows the user's name 'Stephanie'. Below this are three featured announcements: 'Maintenance for Student Information System', 'Let's Talk Africa Covid 19: Impact on Education', and 'Register for Diversity Forum 2020'. A 'VIEW ALL' button is at the bottom right of these announcements. Below the announcements is a large banner for 'COVID-19 UPDATES'. At the bottom, there is a section titled 'Student, Faculty, and Staff Resources' with four icons: 'Remote Learning, Teaching, and Work Resources', 'Student Services', 'Faculty Services', and 'Staff Services'. Below this is a 'My Favorites' section.

39. Type “DocuSign” into the search box at the top and click search.



40. The DocuSign icon will appear in the search results. Click the icon to open DocuSign.

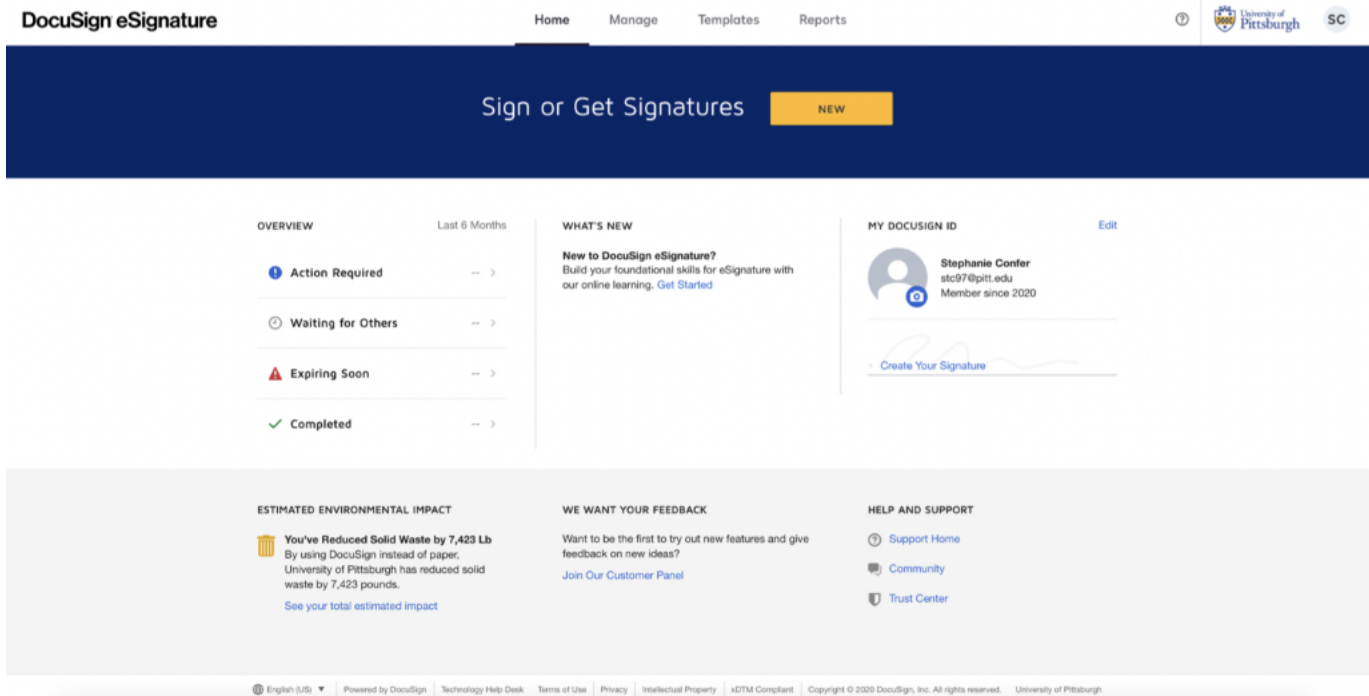


Search Results: Tasks

[Clear Filters](#) [Back](#)



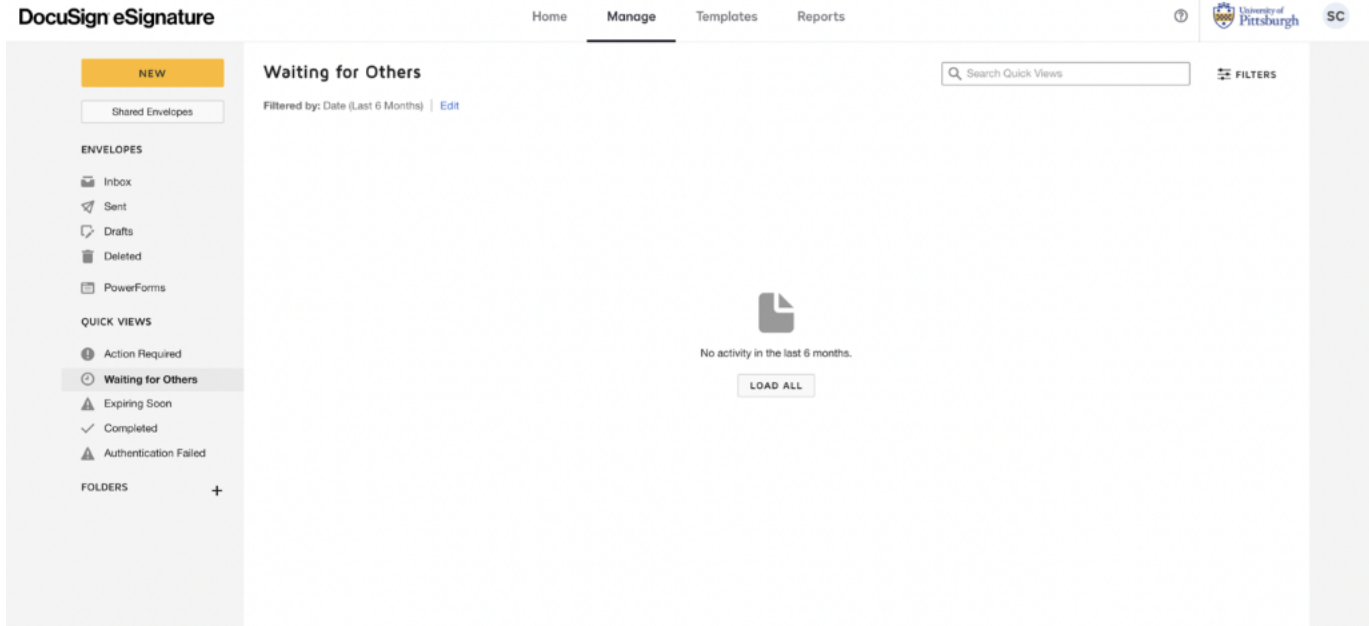
41. Once you click on DocuSign, you may need to click “Continue” to login. You will then be taken to the following screen. This is the “home” or landing page of DocuSign.



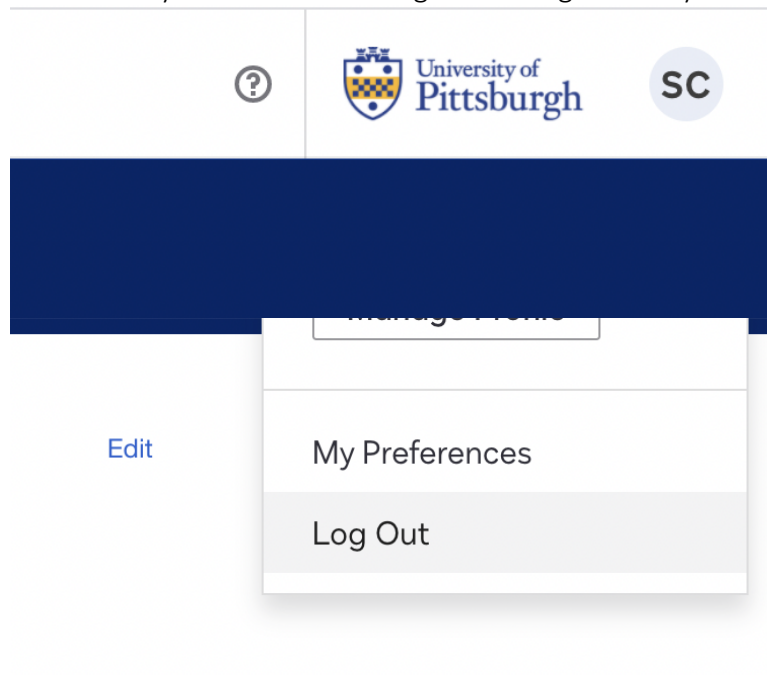
Your DocuSign home page features your pending and completed agreements. On the left-hand side of the screen you will see the following headers.

- **Action Required** are those documents that require signatures – you must flag signature lines before the documents are sent to department heads.
- **Waiting for Others** are agreements that you have sent to be signed and require action from others.
- **Expiring Soon** are those documents that have an expiration setting attached to it. The envelope will be voided if it is not completed by all parties before the expiration. If an envelope you sent is expiring soon, you may be able to extend the expiration to give your recipients more time.
- **Completed** are agreements that have been flagged, sent, and signed.

42. Next, click on “Waiting for Others”. On this page you will be able to see the status of your contract in the workflow without having to ask the recipients. This resource is always available to you. Please be sure to use it if you are unsure of the status of your document in the signature approval process.



43. Once you have completed all of the steps above, you can now logout by clicking on the icon in the top right-hand corner that is showing your initials. A drop-down navigation will appear once you click, and from there you can click on “Log Out” to sign out of your account.





This document was prepared by the University of Pittsburgh's Global Partnerships and Engagement Team. If you have questions or encounter any issues, please reach out to the Director of Global Partnerships and Partner Engagement, Garrett Margliotti, via email at: g.margliotti@pitt.edu for assistance.