Dynamic Forms

User Guide

University of Miami
Graduate School

Dynamic Forms Basics

- Basic Definitions: there are two types of form users
  - Initiator (student): the user who starts a form.
  - Co-signer (faculty and staff): a user to whom a form is routed, after the initiator has submitted the form. The co-signer may just need to review and sign the form, but in some cases, they might have to complete a section of the form. Forms may have more than one co-signer.

- Dynamic Forms uses UM Single Sign-On (SSO) for every form, so there is no need for additional login credentials. For every form, all users must use their official UM email address. Therefore, all forms must be initiated by the student who is making the request and forms can only be signed by the specific co-signers to whom the form is sent (i.e. Graduate Program Directors, Associate Deans of Graduate Education, Advisors and Committee Members).

- Co-signers will receive an email notification from gradforms@miami.edu whenever they need to sign a form. Therefore, this email address should be added to co-signers' safe senders' lists to ensure the notification email does not land in junk/spam/clutter folders. To visit Dynamic Forms for any other reason, click here to go to the home page.

- Signatures will appear as a timestamp with the user's printed name and the date and time of signature.

- Users will only be able to write or click on the section of the form they are allowed to fill out. Everything else will appear faded out for reading purposes only. Co-signers must read the form content carefully and identify their section before signing the form.

- The Graduate School's forms, located in the Graduate School's website, that have been converted to Dynamic Forms are the following:
  1. Application for Admission to Candidacy for Ph.D./Ed.D./D.M.A.
  2. Application for Readmission to the Graduate School
  3. Application for Time to Degree Extension
  4. Certificate of Defense Approval Form
  5. Defense Notice Form: Master's and Doctoral Students
  6. Electronic Thesis and Dissertation (ETD) Availability Agreement Form
  7. Petition for Leave of Absence
  8. Petition for Transfer of Credit
  9. Committee Composition Change Request Form (**new form**)
  10. Electronic Thesis and Dissertation (ETD) Content Approval Form (**new form**)
  11. Dissertation Completion Fellowship Application (**new form**)
  12. Graduate Student Travel Scholarship Application (**new form**)
  13. McKnight Fellow Travel Scholarship Application (**new form**)

UNIVERSITY OF MIAMI
GRADUATE SCHOOL

Signing in to Dynamic Forms

- In most cases, co-signers will only need to log in to Dynamic Forms when they need to sign a form. They will receive an email notification from gradforms@miami.edu every time their signature is needed on a form. Periodic notification emails will be sent as reminders every week until the form is signed.

- The email will include a link to Dynamic Forms. Most often, it will take co-signers directly to the form they need to sign. The link will read: *Click here to complete your section of the form*. For some forms, the link may take users to the Dynamic Forms homepage.
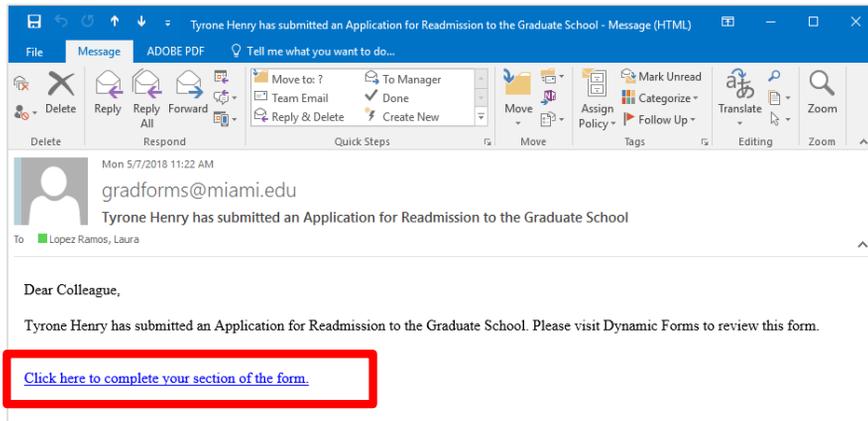
- To access Dynamic Forms for any other reason (e.g. check on the status of a form, view history of processed forms), users may visit their Dynamic Forms homepage by clicking here or using the link located in the Graduate School's website under the *Forms* section and the *Resources* section.

- At the Dynamic Forms homepage, there will be two buttons, one for *Pending/Draft Forms* and another for the *Forms History*. Users may switch between these two sections at any time using the *My Forms* dropdown menu at the top right corner or by returning to the homepage using the home icon on the top left corner.

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GRADUATE SCHOOL

3
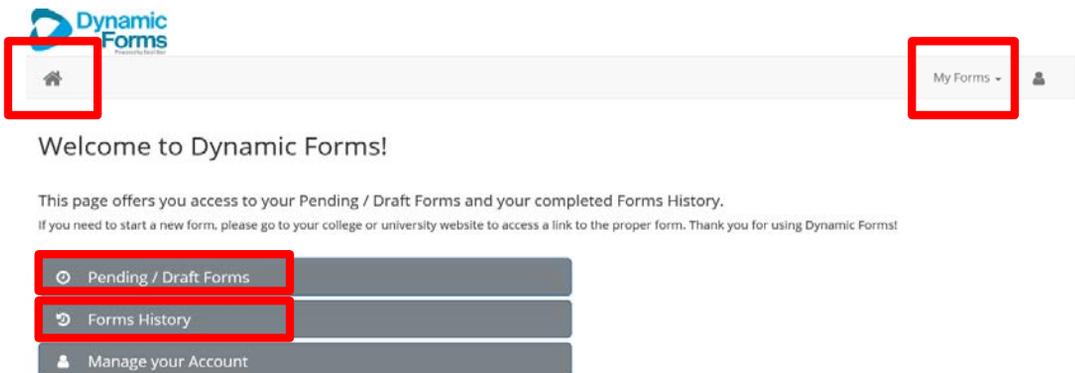
Signing Forms

- Co-signers must read the form content carefully and identify their section before signing the form.
- Form users will only be able to write or click on the section of the form they are allowed to fill out. Everything else will appear faded out for reading purposes only. Form users must complete the form section which belongs to them and then refer to the progress options at the bottom of the page to submit the form.
- When reviewing a form, co-signers will have two progress options at the bottom left corner:
  - Save Progress: Create a draft of the form so it can be completed and signed at a later time. The draft will appear on the *Pending/Draft Forms* section.
  - Next: This option is used to confirm the *Approved/Denied* selection and to continue to the signature page.

- After users complete their required section of the form and click *Next*, the signature page will appear.
- Users must write their names exactly as they appear on the page in the provided field to sign the form.
- Forms use recaptcha validation, so users must check the *I'm not a robot* box and follow any on-screen instructions to validate their response.
- The form will be submitted once the user clicks on the *Sign Electronically* button. Signatures appear as timestamps on the form with the printed name of the user and the date and time of signature.
- The co-signer, as well as the form's initiator (student), will receive email confirmation that the form was signed.

Electronic Signature

Please read the Disclosure / Consent before you sign your form electronically.

Typing your name exactly as it appears below signifies you are completing this form using an electronic signature. By signing electronically, you are certifying that you have read and understand the Disclosure/Consent and agree to electronically sign. You also agree to receive required disclosures or other communications related to this transaction electronically.

To continue with the electronic signature process, please enter your name and click the "Sign Electronically" button to save your information and submit your electronic signature.
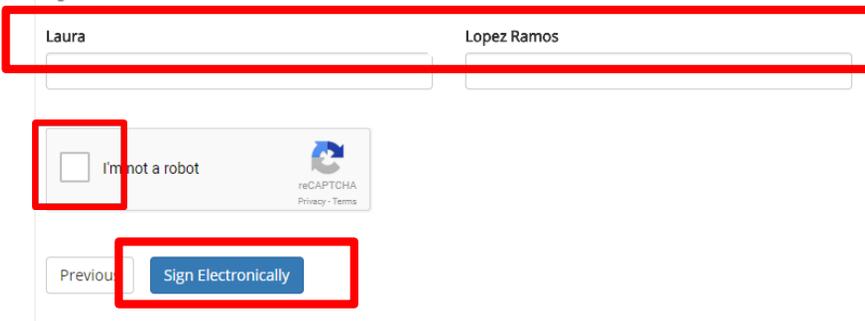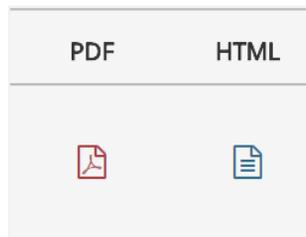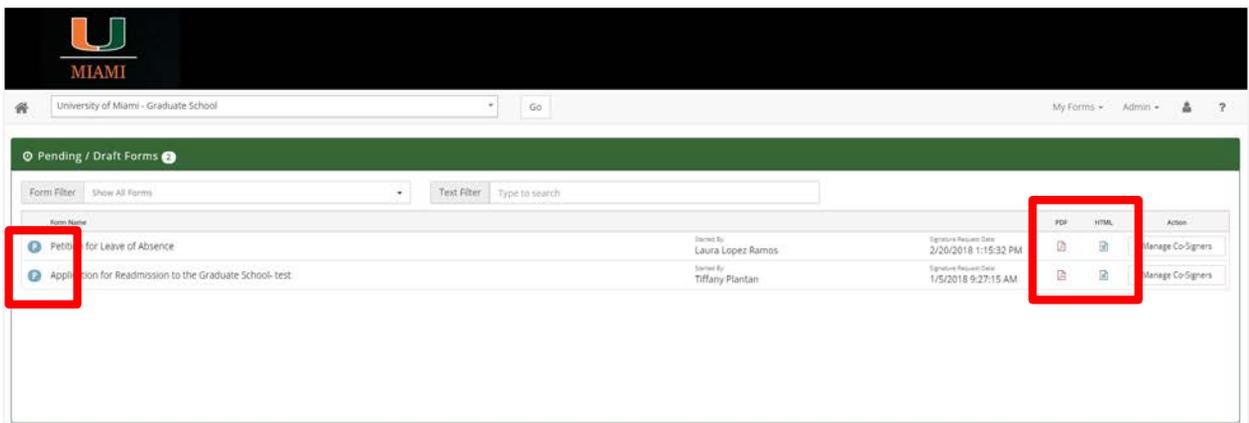
Laura   Lopez Ramos

☐ I'm not a robot   reCAPTCHA
                          Privacy - Terms

Previous   **Sign Electronically**

Pending/Draft Forms **Section**

- In this section, users will find all forms and form drafts in which they are an initiator (student) or a co-signer (faculty and staff) that are still pending review by a co-signer or the Graduate School. Forms will remain in this section for both initiators and co-signers, even if all of the signatures have been collected, until they have been processed by Graduate School.
- The color coded circles in the left-hand side will display the status of the form.

Icon	Status	Action
I	Yellow circle with I: Incomplete	You need to complete the form
P	Blue circle with P: Pending	Another co-signer needs to complete the form (no action needed on your behalf at this time)

- In this section, users may view the form in PDF format or using the web browser (HTML) by clicking on their respective icons. This feature allows both initiators and co-signers to monitor the form's workflow.

Forms History **Section**

- In this section, users will see all forms in which they are either initiators or co-signers that have been processed by the Graduate School. A form will move to this section from the Pending/Drafts section once it has been fully processed by the Graduate School.

- Users may view a form in PDF format or using the web browser (HTML) by clicking on their respective icons.

Frequently Asked Questions

1. How do I sign in to Dynamic Forms?

   To access Dynamic Forms, click here and log in using SSO. Direct link: https://qafederation.ngwebsolutions.com/sp/startSSO.ping?PartnerIdpId=https://caneid.miami.edu/idp/shibboleth&TargetResource=https://dynamicforms.ngwebsolutions.com/MyForms/StudentHome.aspx

2. What do I do if I cannot sign in to Dynamic Forms from the link in my notification email?

   First, make sure you are connected to Single Sign-On (try accessing another service which uses SSO, such as Workday or Canelink). Then, use the link above (also located in the *Forms* section of the Graduate School's webpage) to access your Dynamic Forms home page. If you still cannot access the form, contact the Graduate School.

3. What do I do if I see an error on the form?

   When a form contains inaccurate information, do not sign the form. Advise the student to submit the form again and to contact the Graduate School so the incorrect form can be deleted. For minor errors and typos, use the optional comments field in your section of the form to clarify the information for the record as needed and proceed to sign the form.

4. What if I want to change a selection I made when signing a form?

   After you sign the form, you cannot edit the information submitted.

5. What do I do if I am not the correct person to sign a form and it was sent to me in error?

   Contact the student and state you are not the correct person. Advise the student to edit the form's co-signers using the "Manage Co-signers" feature. For the Certificate of Defense Approval form or the ETD Final Content Approval Form specifically, students will need to contact the Graduate School to update email addresses.

6. How can I share the forms I receive with my department?

   Only the initiator and co-signers of a specific form have access to the form through Dynamic Forms. Form users can download the form as a PDF document to share with others. Once a form is fully processed by the Graduate School, it will be uploaded to the student's record in OnBase by the Graduate School team where it may be accessed by authorized faculty and staff who were not co-signers on that form.

If you have any questions or issues with Dynamic Forms, please contact the Graduate School at graduateschool@miami.edu or 305-284-4154.

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