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. To visit the Dynamic Forms homepage, click here. 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).

- Initiators will receive email confirmation from gradforms@miami.edu when they complete the form and when each of the co-signers in the workflow sign the form. Co-signers will receive an email notification whenever they need to sign a form. The email address gradforms@miami.edu should be added to initiator's safe senders' list to ensure notification emails does not land in junk/spam/clutter folders.

- 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.

- 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

Filling out Forms

- The Graduate School's forms require the initiator to input the information of the form's co-signers in order to send them the form. For most forms, initiators must know the name and email addresses of their Advisors, Graduate Program Directors and/ or Associate Dean of Graduate Education. The Graduate School provides a list of Graduate Program Directors and Associate Deans of Graduate Education on the website, but students should confirm this information with their departments to ensure their forms are routed to and signed by the correct person.

- Initiators will not receive an error notification if the email addresses they input on the form are incorrect or if the notification emails bounce. Therefore, students are encouraged to double-check the information before clicking *Continue*.

Instructions

For this form to be submitted to the Graduate School for consideration, it will need to be approved and electronically signed by your Advisor and the Graduate Program Director. If your Graduate Program Director approves your request, it will be automatically submitted to the Graduate School for final review. Please enter below the official UM email addresses for your Advisor and Graduate Program Director. For a list of Graduate Program Directors, click here.

Form Participants

Advisor

First Name	Last Name	Email

Graduate Program Director

First Name	Last Name	Email

Continue

- Once the necessary email addresses have been added to the workflow, the initiator will be able to fill out 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, users 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 information on the form and to continue to the signature page.

Save Progress   Next

Signing Forms

- 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. The form will now have a timestamp with the name of the user and date/time of signature.

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**

Signing in to Dynamic Forms

- To access Dynamic Forms to check on the status of a form or any other reason (e.g. view history of processed forms, send a co-signer a reminder to sign a form), 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.
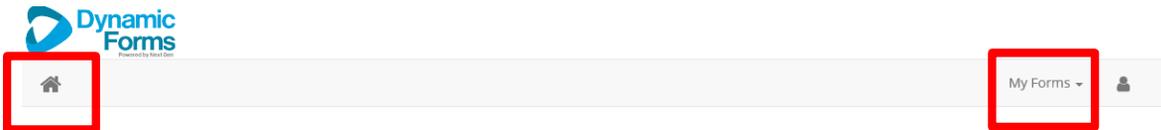
Pending/Draft Forms **Section**

- 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.

- This section also allows initiators to manage a co-signers information using the *Manage Co-Signers* button:
  - Re-send notification email: Automatic reminders are sent to co-signers every seven days, but manual reminders can be sent by the initiator in the event an email address is edited or replaced.
  - Correct a co-signer's email address: Fix typos in email addresses or change to another email alias (i.e.: name@miami.edu instead of name@med.miami.edu). 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.
  - Replace a co-signer: Change the name and email of the co-signer in the case the form was sent to the wrong person by error.

UNIVERSITY OF MIAMI
GRADUATE SCHOOL

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 Single Sign-On (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. How can I check the status of my form?
   Visit the *Pending/Draft Forms* section and select the PDF view of the form. At the bottom of the form, you will see the signatures that are pending and the timestamps of the signatures that have already been collected.

3. How can I edit my form after I signed it and it was sent to the co-signers?
   After you sign the form, you cannot edit the information submitted on the form.

4. How can I correct a typo or change the email address of one of my co-signers?
   You can correct a co-signers' email address by using the *Manage Co-Signers* button on the Pending/Drafts Forms section. 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.

5. How do I know the Graduate School received by form?
   Once all co-signers have reviewed and signed your form, it will be sent to the Graduate School and you will receive an email confirmation.

6. Can I use my personal email address or the personal email address of one of my co-signers to complete the form?
   Since Dynamic Forms uses SSO, only official UM email addresses for faculty and staff can be used. See below for information on how external committee members without UM SSO access Dynamic Forms.

7. What do I do if I have an external committee member who is not part of the University of Miami as a co-signer and does not have SSO?
   Forms which may potentially have co-signers without SSO have been programmed specifically to allow these co-signers to create a Dynamic Forms account and be able to sign the form. Enter the individual's name and email address when prompted and proceed accordingly.

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

UNIVERSITY OF MIAMI
GRADUATE SCHOOL