OVERVIEW

Memos written in a letter of correspondence format are needed for virtually everything that is submitted to the Graduate School to track and record the progression toward your degree. The GPD reviews your progress and sends required memos to the Graduate School, acting as liaison between you/your committee and the University as you meet each of your requirements. Additional forms are also submitted to the GPD to record your progress within the department. You can find fillable templates* for the required forms in your degree track (PhD, MS, MSP) on the Eco Grad Program Teams Page linked here: *Grad School Memos and Forms*. You can also find the forms on the Eco Website https://eco.umass.edu/for-current-studentsGrad School Memo Templates/forms/.
You and your major professor are responsible for completing the appropriate forms and forwarding them to the GPD in a timely manner when communication with the Graduate School is required. The preferred way to collect your signatures is via DocuSign (see instructions below). *When your forms are complete and signed, please upload as a single PDF file here:* ***GPD Memo Request/Form Submission****,* **where they will be queued for review and submission to the graduate school.**

DETAILED INSTRUCTIONS
1. Download and fill out the form you need at the links above. Be sure to complete all required fields.
2. Now you need signatures. A great way to get your form signed in a timely manner is to route it through DocuSign. Please use DocuSign anytime you need the GPD's signature on a form. It is suggested that you use DocuSign for getting all your other signatures as well. It's easy! Follow these steps:
   [METHOD 1]
   o Log in to https://account.docusign.com/ using your UMASS account.
   o Click "Create an Envelope"
   o Upload your form. Be sure the version you upload is filled out completely except for the signatures needed.
   o Click "Add recipient" to add the names and email addresses of each person who needs to sign the form using the "Add recipient" button. *Keep the toggle at the top right back to the default setting "needs to sign."* For memos requiring signature of the GPD, please include the GPD as a recipient at this step, using gpd@eco.umass.edu. For the Dept Head, use pswarren@umass.edu.
   o Important! You then need to create Signature Fields for each recipient. You will see the names of your recipients (color coded) in a drop-down menu at the left. Select each recipient and drag the pencil icon to the correct place on the memo for signature.
   o Review and click "send".

   [METHOD 2] Microsoft Teams has a built-in App called "Approvals" that may be convenient for you, especially if you download your memo template from Teams. The app can automate your DocuSign login and create the envelope for you. Simply click on the blue "Approvals" icon under apps and select the + sign at the top right for "New Approval Request." From there, follow the prompts for DocuSign. *Do not use Adobe.* The steps thereafter are similar to those in Method 1.

   Most graduate students and faculty have free access to DocuSign. Instructions for logging in are here: https://www.umass.edu/it/node/9307. If you run into trouble or don't have access, please contact OIT. In a pinch, Maggie DiGregorio or Lexie Renna can assist you with routing.
3. Check your email. You will get a copy of your document when all the signatures have been collected. (You can login to DocuSign anytime to check the status. It is ok (really) to nudge your colleagues/committee/advisor to get the paperwork signed!)
4. When you receive the completed document from DocuSign, save the signed version in the following format: LASTNAME_initial_filename.pdf (the filename should match that of the file you downloaded).
5. Submit your signed and completed form here as a single PDF**: GPD Memo Request/Form Submission**. Please allow *at least two full business days* for the GPD to review and forward your signed forms to the graduate school.

For special circumstances you may need a custom form. When in doubt, please call the Graduate School and ask what specific information they require for your situation, and prepare a draft of your memo accordingly. You can then use GPD Memo Request to notify the GPD about what you need.