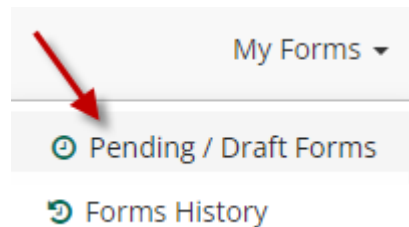


Electronic Forms (E-forms) Dashboard Instructions

Dashboard for Form Participants

When you log into Dynamic Forms as a regular participant, you will get a page that looks similar to this.



This box contains links to two areas:

- Pending/ Draft Forms: This area will contain forms you have submitted that are waiting on signatures and/or approvals. Click on the PDF or HTML icon for the form you wish to view/download/save/print. By clicking on the column header, it will put that column in ascending or descending order.
- Forms History: This area contains your personal form history, where you can download PDF HTML or Audit files of forms you have submitted that have been processed.

Pending/Draft Forms Area

The image shows a table titled 'Pending / Draft Forms'. The table has columns for Form Name, Status, Description, Date, PDF, HTML, and Action. A red arrow points to the 'Action' column header.

Form Name	Status	Description	Date	PDF	HTML	Action
IS Testing	Pending	Started By: Tammy Blair	Signature Request Date: 8/6/2023 7:10:19 AM			Action
IS Testin	Incomplete	Started By:	Signature Request Date:			Manage Co-Signers

When you enter this area, you will see a screen similar to the one above. This list will show any (if you have any) forms that are in the process of either being signed or fully processed.

One item of importance is under the Action column; **Manage Co-Signers**.

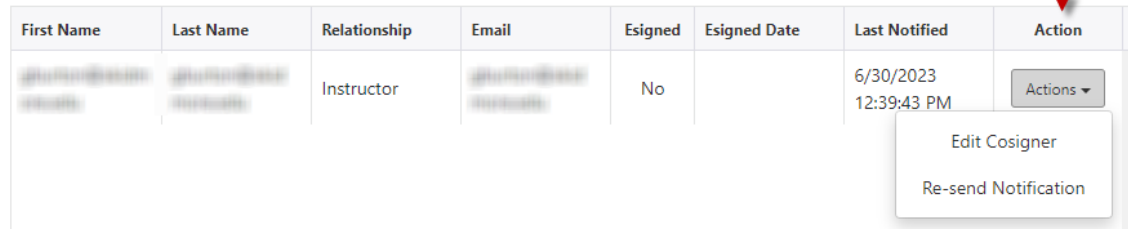
Clicking the **Manage Co-Signers** button will bring up a window allowing you to take "Action". The "Action" drop-down list will allow you to:

- edit/change your co-signer(s) information (if applicable)
- re-send a notification to our designated co-signer(s)

Co-Signer Information

* Click the Edit Cosigner action to edit/change your co-signer(s) information

* Click the Re-send Notification action to re-send a notification to your designated co-signer(s)

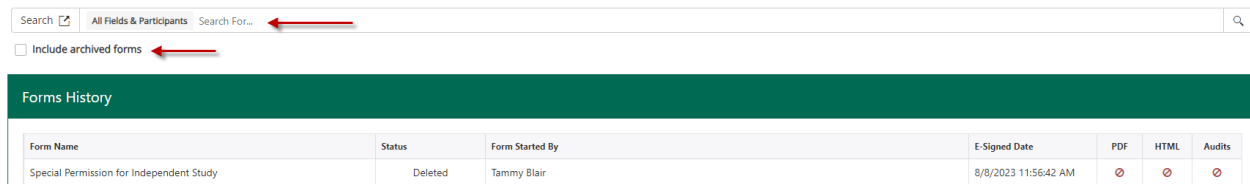


First Name	Last Name	Relationship	Email	Esigned	Esigned Date	Last Notified	Action
[blurred]	[blurred]	Instructor	[blurred]	No		6/30/2023 12:39:43 PM	Actions ▼ Edit Cosigner Re-send Notification

Clicking the "Re-send Notification" action item will send an email to the next person who needs to sign your form reminding them the form needs to be signed.

Forms History Area

The Forms History page shows you all forms you have personally submitted as well as forms you have signed that were submitted by someone else. You can download PDF, HTML and Audits files of these forms from this page. You can also Search for a specific form by field names or by participant and/or view archived forms.



Search All Fields & Participants Search For...

Include archived forms

Form Name	Status	Form Started By	E-Signed Date	PDF	HTML	Audits
Special Permission for Independent Study	Deleted	Tammy Blair	8/8/2023 11:56:42 AM			