

# Google Sheets Tutorial for CAP L3 Digital Document Form

This semester Ed Prep Licensure Programs will be using a GOOGLE Sheet for the CAP L3 form. The link for this form can be found on the [Ed Prep Blog](#) - or use this [L3 direct link](#) at <https://docs.google.com/spreadsheets/d/1CMdHJTFGNskgLCsgI01EU5-br5P6ocR2rMYIikDeP/Pk/edit?usp=sharing>

## Instructions for using the L3 Google Form

**Program Coordinators** - working with their Program Supervisors will create an individual document for each Teacher Candidate. These should be ‘filed in a safe space’ within your own folder for your program - to be shared with the Program Coordinator, the Program Supervisor, the Supervising Practitioner and the Teacher Candidate during the semester.

**After each three-way** the triad will simply TYPE IN THEIR NAMES as proof that they all agree with the decisions made at the meeting.

**After the FINAL 3-way meeting** - this document will be saved as a PDF and the teacher candidate will send it as DocuSign document for final signatures using the instructions below.

The instructions below will be a **resource guide**:

1. how to [make a copy](#) of the digital document to make your own separate editable document,
2. how to [share it](#) with others,
3. how to [save it](#) as a PDF
4. how to [upload your document to DocuSign](#).

## Creating an L3 for each Teacher Candidate (making copies)

1. You need to be logged into google drive with your umass account. Once you are in the [document](#), click **File** on the top left corner.
2. Choose **Make a copy**.
3. Rename the document as follows: Teacher Candidate First Name, Last Name, L3, and Academic year (e.g. 2023-2024). Once you have typed in the name, then click **OK**.

4. You will be directed to the renamed copy of the Google Sheet with the Teacher. As the Candidate, you will fill out the first section titled **General Information**.

Candidate Assessment of Performance Form									
<b>Section 1: General Information</b> (to be completed by the Teacher Candidate)									
Candidate Information									
First Name:	John	Last Name:	Doe						
Street Address:	123 Example Street								
City/Town:	Amherst	State:	MA	Zip Code:	1003				
MEPID #:	12345678								
Massachusetts License Number (if applicable):	N/A								
Program Information									
Sponsoring Organization:	Example School								
Program Area & Grade Level:	Math, 6-8								
Have any components of the approved program been waived? 603 CMR 7.03(1)(b)	Yes	<input type="checkbox"/>	No	<input checked="" type="checkbox"/>					

Then, share the document with the appropriate people.

## How to Share a Google Sheets Document

The Teacher Candidate needs to fill in the first section of information prior to their first three way meeting. When you are ready to share - follow the instructions below.

1. In your copy of the Google Sheet document, click **Share** on the top right corner.



2. Please enter the emails of the Program Coordinator, Supervising Practitioner and the Teacher Candidate. After you finish, click **Send**.
3. Your sharing options for the document will be saved.

## 3 WAY MEETINGS

**Prior to your first three way meeting - please ensure that the Teacher Candidate has shared the document.**

During the semester when you are doing the 3-way meetings, make sure all the participants have access to this link. At the end of the meeting, in place of signing at that point, they must type in their name on the signature line for that meeting to agree with the decisions made. Be sure to include the date of the meetings.

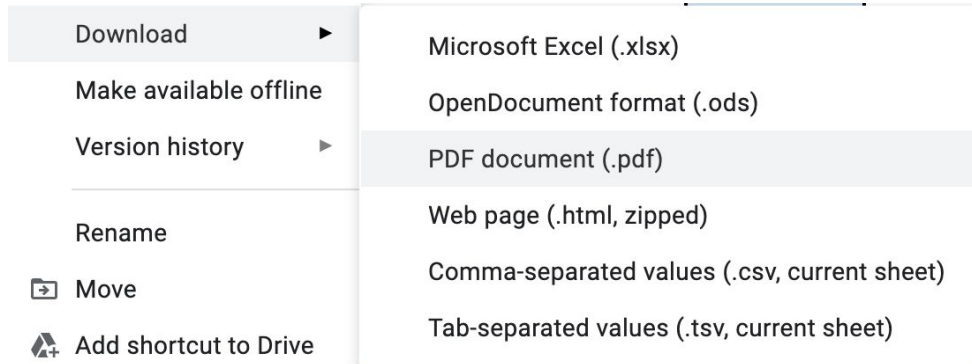
Three-Way Meetings <i>(at each 3-way meeting, each participant must initial and date to indicate agreement at the meeting)</i>		
1st Three-Way Meeting	Candidate	
Date:	Supervising Practitioner	
	Program Supervisor	
2nd Three-Way Meeting	Candidate	
Date:	Supervising Practitioner	
	Program Supervisor	
3rd Three-Way Meeting	Candidate	
Date:	Supervising Practitioner	
	Program Supervisor	

## END OF SEMESTER FINAL SIGNATURES

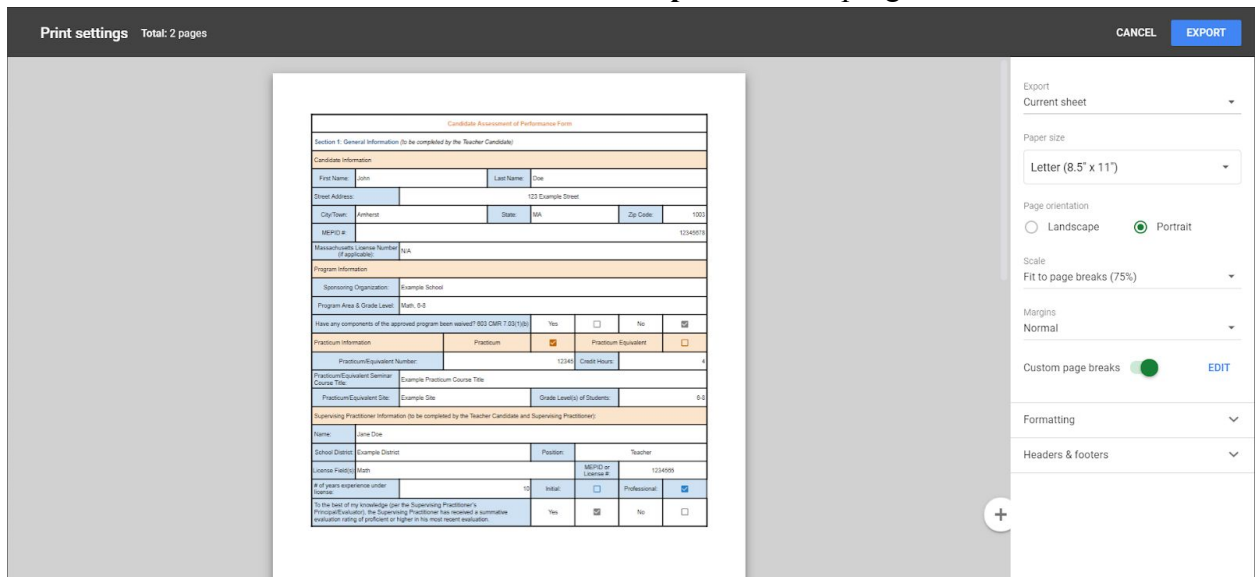
After the final meeting after you have agreed the teacher candidate is “Ready to Teach”, fill out Section 3: **Total Hours and Signatures** (not including the signatures). You must then save the document using the instructions below to get official signatures for state licensure.

## How to Save a Google Sheets Document as a PDF

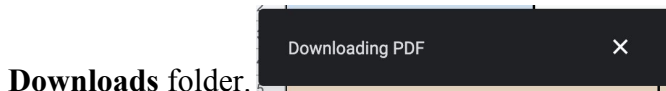
1. Once you are in the document, click **File** on the top left corner.
2. Click on **Download** and select **PDF document (.pdf)**.



3. Confirm that all the information is correct. Click **Export** in the top right corner.



4. Your document will be downloaded as a PDF and saved to your computer in the

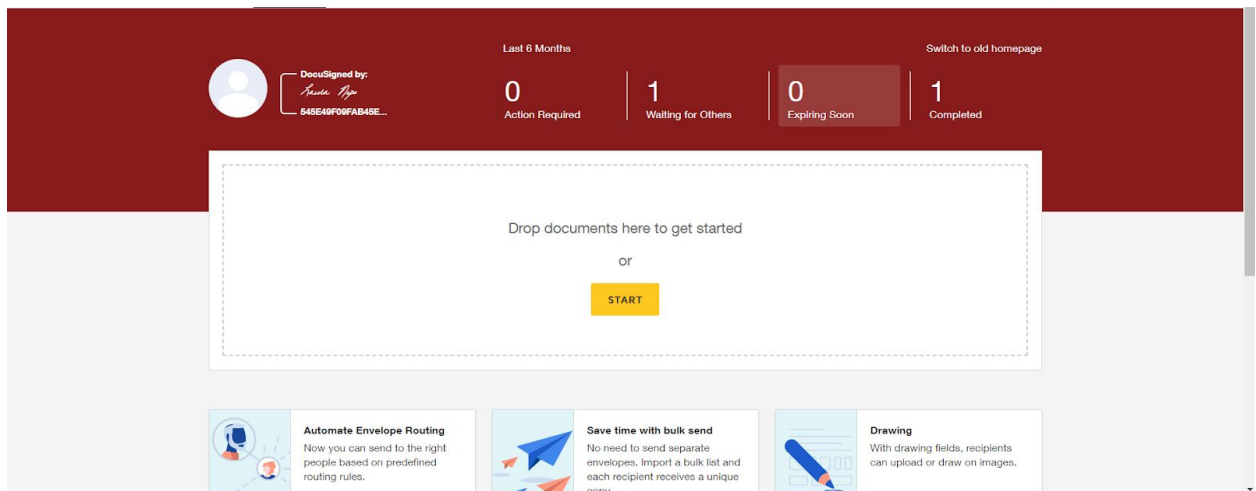


**Downloads** folder.

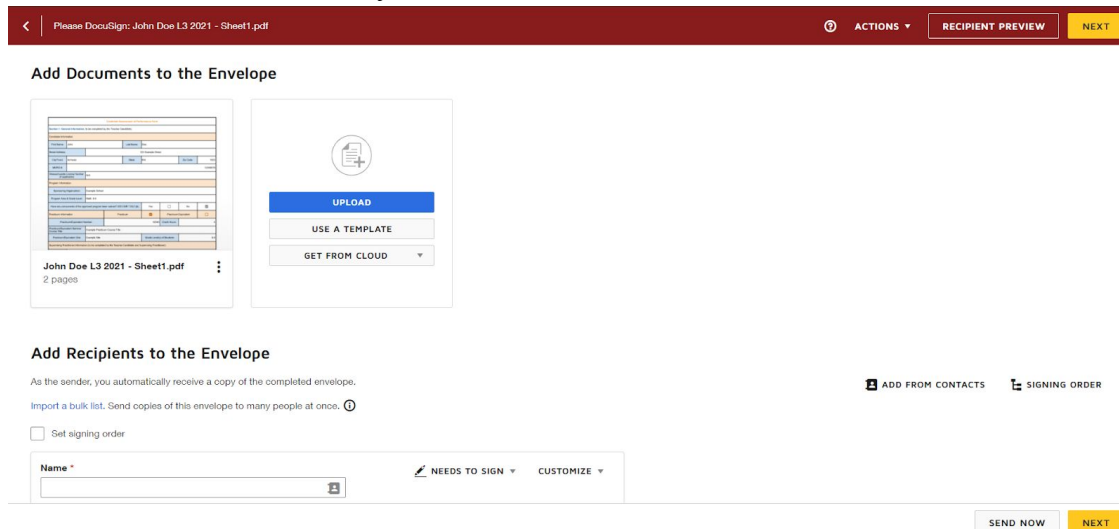
## How to Upload your Document to DocuSign for official signatures

The uploading is to be completed by the Teacher Candidate. For a general video explanation: <https://support.docusign.com/en/videos/New-DocuSign-Experience-Sending-Documents>

1. Log in to DocuSign.
2. Either click **Start** > **Send an Envelope** > **Upload** > **Sign**, or drag the PDF into the box as seen below.



Both methods will direct you to the same screen:



3. Add Recipients to the Envelope.
  - a. Check the box for **Set signing order**.
  - b. Enter information for the Supervising Practitioner, Program Supervisor, Program Coordinator, and EdPrep Office. For EdPrep Office, use email [edprep-office@umass.edu](mailto:edprep-office@umass.edu). Also click the dropdown menu **Needs to sign** and

select **Receives a copy**. For additional instructions using [this link](#).

c. Once the Recipients' information is entered, click **Next** in the top right corner.



4. When creating your signing fields, create your fields in Section 3 on your Digital Document:

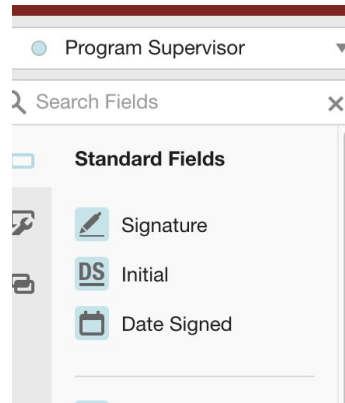
Supervising Practitioner:		Date:	
Program Supervisor:		Date:	
Mediator (if necessary see: 803 CMR 7.04(4))		Date:	
Program Coordinator: I hear by confirm the above information is accurate and Candidate may be put forward for licensure endorsement by UMASS		Date:	

a. To assign a signature or other field for the recipient, click and drag a field from the Fields Palette and place it on the document. For this document specifically, you will need to add Signature and Date Signed fields for the three recipients.

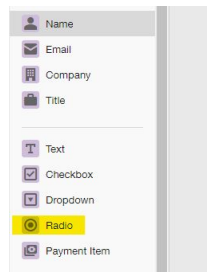
Supervising Practitioner:		Date:	
Program Supervisor:		Date:	
Mediator (if necessary see: 803 CMR 7.04(4))		Date:	
Program Coordinator: I hear by confirm the above information is accurate and Candidate may be put forward for licensure endorsement by UMASS		Date:	

**Note:** Instead of the role in the dropdown menu saying “Program Supervisor,” it

will show the actual name you entered for the recipient.



5. Your document will be sent out to your members to digitally sign.
6. For the final signatures, there will be an additional checkbox that the Candidate must add when creating the DocuSign form.
  - a. Select the Program Coordinator role, and add a radio button field to the Yes/No boxes. You can drag the second box that appears to the No box.



Please follow instructions to download to PDF and then upload to DocuSign to get formal signatures

Supervising Practitioner:		Date:	<input type="text" value="Date Signed"/>
Program Supervisor:		Date:	<input type="text" value="Date Signed"/>
Mediator (if necessary see: 603 CMR 7.04(4))		Date:	
Have any components of the approved program been waived? 603 CMR 7.03(1)(b)	Yes	<input type="radio"/>	No <input type="radio"/>
Program Coordinator: I hear by confirm the above information is accurate and Candidate may be put forward for licensure endorsement by UMASS		Date:	<input type="text" value="Date Signed"/>

- b. You can proceed to send the document as usual once the radio buttons have been added.
7. Once the three recipients have completed their signatures (the document will be sent in Signing Order: Program Supervisor, Supervising Practitioner, Program Coordinator), everyone will receive a PDF of the completed form. The EdPrep Office will automatically receive a copy.