



UNIVERSITY of MARYLAND  
BALTIMORE

# DocuSign Use for Research Compliant e-Signature Capture

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**DocuSign<sup>®</sup>**

# What to Expect

- Overview on what is DocuSign and how to access it
- UMB DocuSign security levels and how to request them
- DocuSign functions available to each security level and the level(s) best suited for researchers
- The e-signature process in DocuSign
- Research applications
- Q&A

# What Is DocuSign?

DocuSign is an electronic signature web application. DocuSign eSignature provides an easy, fast, and secure way to send, sign, approve, and manage all of your electronically signed documents at anytime from anywhere.



# UMB DocuSign Security Roles

- No DocuSign account (anyone can sign a sent document)
- DocuSign account Viewer security role (default account role)
- DocuSign account Sender security role (requested account role) - *most applicable for study team members*
- DocuSign account Template Sender security role (requested account role)
- DocuSign account Template Creator security role (requested account role)

# UMB DocuSign – Sender Role

- Anyone can sign a document sent through DocuSign, however if you want to upload documents to send for signature you must start by initiating a DocuSign account.
- Once you initiate you will only have basic "Viewer" rights and will not be able to upload and send a document to others.
- To upload or send documents you will need to request a "Sender" security role.

# Getting Started: [www.umaryland.edu/docusign](http://www.umaryland.edu/docusign)

The screenshot shows the University of Maryland Baltimore website. At the top, there is a yellow banner with a COVID-19 recovery update. Below this is a dark navigation bar with the university logo and various utility links. A secondary yellow banner contains COVID-19 hotline information. The main navigation bar lists categories like About UMB, Academics, Admissions, Research, Services, University Life, and Give to UMB. The breadcrumb trail indicates the current location: UMB Home / About UMB / Offices / Center for Information Technology Services / CITS Services / DocuSign. The main heading is "Center for Information Technology Services". On the left, a vertical menu lists CITS-related pages. The central content area features a "DocuSign" heading, a welcome message, and a brief description of the service. On the right, a "QUICK LINKS" box provides direct access to DocuSign login, account video tour, and the authenticated forms library.

COVID-19 Recovery, updated April 14 [Read more.](#)

MYUMB DIRECTORY EMERGENCY THE ELM CALENDAR BLACKBOARD SURFS UM SHUTTLE Search

UNIVERSITY of MARYLAND BALTIMORE

COVID-19 Hotline (1-800-701-9863): [Make the Call](#) | [Trace Your Contacts](#) | [Stop the Spread](#)

About UMB Academics Admissions Research Services University Life Give to UMB

[UMB Home](#) / [About UMB](#) / [Offices](#) / [Center for Information Technology Services](#) / [CITS Services](#) / DocuSign

## Center for Information Technology Services

- About CITS
- CITS Services
- CITS Calendar
- Help Desk
- Training
- IT Security and Compliance

### DocuSign

*Welcome to DocuSign eSignature at UMB!*

DocuSign eSignature is the easy, fast, and secure way to send, sign, approve, and manage all of your electronically signed documents at anytime from anywhere.

#### QUICK LINKS

- [DocuSign Login](#)
- [DocuSign Account Video Tour](#)
- [UMB Authenticated Forms Library](#)

# DocuSign Log In (requires UMB and DUO authentication)

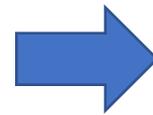
**DocuSign**

Please log in to your account

Email address

**CONTINUE**

[No account? Sign up for free](#)



 UNIVERSITY of MARYLAND  
BALTIMORE

**LOGIN TO DOCUSIGN, INC.**

UMID:

Password:

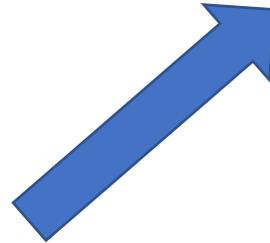
**Login**

[Forgot Password?](#) [First Time User, Setup Your Password](#) [OneCard Guest Deposit](#)

This is shibprd5.

# “Sender” Security Role Request

- Navigate to UMB DocuSign Webpage:  
[www.umb.edu/docuSign](http://www.umb.edu/docuSign)
- Navigate to bottom of webpage to select and subsequently expand the DocuSign Security section



**DocuSign Security**

Options for Security Roles:

- **Viewer**
  - The **Viewer** role is the default role that all DocuSign users are initially assigned.
  - The **Viewer** role allows a user to open any document that has been sent to the user and allows the user to sign any document within the DocuSign Application.
  - This default role allows you to process documents sent to you but **will not allow you to upload** documents to send out to someone.
  - To request a change to another security role that is described below, you will need to complete the **UMB DocuSign Security Change Request Form** which is located on the [CITS Services Authenticated UMB Forms Library](#) webpage.
- **Sender**
  - Allows the user to upload any document and configure it for DocuSign
  - [Sending Envelopes In DocuSign](#)
  - [Correcting a Document](#)
- **Template Sender**
  - Allows the person to only send Template documents that they have been given access. The upload

Center for Information Technology Services

Authenticated UMB Forms Library

Center for Information Technology Services

DocuSign Forms

CITS

- UMB DocuSign Security Change Request Form
- UMB DocuSign Template Form

Click “CITS  
Services  
Authenticated  
UMB Forms  
Library” link to  
bring you to  
the landing  
Page

The screenshot shows the University of Maryland Baltimore website. At the top, there is a dark navigation bar with the university logo and name on the left, and a search bar on the right. Below the navigation bar is a yellow banner with a COVID-19 hotline notice. Underneath the banner is a yellow navigation menu with links for About UMB, Academics, Admissions, Research, Services, University Life, and Give to UMB. Below the navigation menu is a breadcrumb trail: [UMB Home](#) / [About UMB](#) / [Offices](#) / [Center for Information Technology Services](#) / [CITS Services](#) / [DocuSign](#) / Authenticated UMB Forms Library. The main heading is "Center for Information Technology Services". On the left side, there is a vertical menu with links: About CITS, CITS Services, CITS Calendar, Help Desk, Training, and IT Security and Compliance. On the right side, there is a section titled "Authenticated UMB Forms Library" with three sub-links: [Center for Information Technology Services](#), [Office of the Controller](#), and [Human Resources](#).

Expand “Center for Information Technology Services” to click the “UMB DocuSign Security Change Request Form” link

# Center for Information Technology Services

About CITS

CITS Services

CITS Calendar

Help Desk

Training

IT Security and Compliance

Project Updates

Forms

UMB IT Policies

## CONTACT

 Help Desk

 help@umaryland.edu

## Authenticated UMB Forms Library

### Center for Information Technology Services

#### CITS

- [UMB DocuSign Security Change Request Form](#) 
- [UMB DocuSign Template Form](#) 



### Office of the Controller ▾

### Human Resources ▾

### Center for Global Engagement ▾

Enter contact information for you and your supervisor (if you are a supervisor you cannot supervise yourself!)

## PowerForm Signer Information

Form: UMB DocuSign Security Request Form

Fill in the name and email for each individual area listed below. All individuals entered will receive an email letting them know when they are required to complete, review and/or sign the document. When you have completed the form, click the FINISH button to route the form to the next area.

Please enter your name and email to begin the signing process.

### Form Requester

Your Name: \*

Your Email: \*

Please provide information for any other signers needed for this document.

### Requester Supervisor

Name: \*

Email: \*

BEGIN SIGNING

# “Begin Signing” Landing Page- Three options in the yellow bar

## Please Review & Act on These Documents

 **DocuSign Support**  
Internet2 OBO University of Maryland, Baltimore

  
UNIVERSITY of MARYLAND  
BALTIMORE  
Powered by **DocuSign**

Please complete the DocuSign form to request a higher level of security within DocuSign.

Please review the documents below.

**CONTINUE**

**FINISH LATER**

**OTHER ACTIONS** ▾

- Finish Later
- Decline to Sign
- Help & Support [↗](#)
- About DocuSign [↗](#)
- View History
- View Certificate (PDF) [↗](#)
- Session Information



Name of Requester: \_\_\_\_\_

Requester's Email: eyancy@umaryland.edu

Requester's Phone:

Requester's Department:

Current DocuSign User?  Yes  No

Have you taken the online training classes?  Yes  No

Security Role Requested:  Sender  Template Sender  Template Creator

Reason for new security role:

Comments:

\*\*\*\*\*

Signatures:

Click “Start” to  
begin signing  
process and  
enter all prompts  
for information

s below.

**START** **FINISH**

DocuSign Envelope ID: 40A94860-8063-48AF-AA2C-AA509837C2C5

 UNIVERSITY of MARYLAND  
BALTIMORE

**DocuSign Security Request Form**

Date of Request:

Name of Requester: Eunissa Yancy

Requester's Email: eyancy@umaryland.edu

Requester's Phone:

Requester's Department:

Current DocuSign User?  Yes  No

Have you taken the online training classes?  Yes  No

Security Role Requested:  Sender  Template Sender  Template Creator

Reason for new security role:

Comments:

# Have you taken the online training classes?

<https://www.umaryland.edu/cits/services/docusign/>

**DocuSign Security Request Form**

Date of Request:

Name of Requester:

Requester's Email:

Requester's Phone:

Requester's Department:

Current DocuSign User? Required - Have you reviewed the online training videos? - Radio1

Have you taken the online training classes?  Yes  No

Security Role Requested:  Sender  Template Sender  Template Creator

Reason for new security role:

Comments:

\*\*\*\*\*

Signatures:

## DocuSign Online Training

### DocuSign Online Training Resources

- [Setting Up a Signature](#)
- [How to Sign a Document Sent to You Via DocuSign](#)
- [Managing Folders](#)
- [How To Sign Your Own Document With DocuSign](#)
- [Sending Envelopes In DocuSign](#)
- [An Overview of Recipient Types](#)
- [Sending Envelopes Using the "SPECIFY RECIPIENTS" Action](#)
- [Adding Fields to Documents for Completion By Recipients](#)
- [Correcting a Document](#)
- [Sending Envelopes using a Template](#)
- [Protect a DocuSign Template From Changes](#)

Choose the  
“Sender”  
option

DocuSign - Center for Informal x Authenticated UMB Forms Libr x Review and sign document(s) x

https://na3.docusign.net/Signing/?insession=1&ti=44b020f270574ca4b7604d1d39cb656

This site uses cookies, some of which are required for the operation of the site. [Learn More](#) OK

Select one radio button FINISH FINISH LATER OTHER ACTIONS

Date of Request: 04/12/2021

Name of Requester: Eunissa Yancy

Requester's Email: eyancy@umaryland.edu

Requester's Phone: 410-706-5022

Requester's Department: CITS

Current DocuSign User?  Yes  No

Have you taken the online training?  Yes  No

Security Role Requested:  Sender  Template Sender  Template Creator

Reason for new security role:

Comments:

\*\*\*\*\*

Signatures: Sign Date: 4/12/2021

Requester:

Powered by DocuSign Change Language - English (US) Copyright © 2021 DocuSign Inc. | v2R

Type here to search 2:36 PM 4/12/2021

# Reason for new security role

**FINISH**

have you taken the online training classes:  Yes  No

Security Role Requested:  **Sender**  Template Sender  Template Creator

Reason for new security role:

Comments:

\*\*\*\*\*

**Signatures:**

Requester:    Date: 4/12/2021

Supervisor:  Date:

Type Name:  Email:

CITS DocuSign Team:  Date:

CITS Comments:

Updated 08/18/2020



describe your  
research role

Click the "Sign" icon to adopt your signature

Adopt Your Signature

Confirm your name, initials, and signature.

\* Required

Full Name\* Eunissa Yancy Initials\* EY

SELECT STYLE DRAW UPLOAD

PREVIEW [Change Style](#)

DocuSigned by:  DS   
B8CAF7E700034C7...

By selecting Adopt and Sign, I agree that the signature and initials will be the electronic representation of my signature and initials for all purposes when I (or my agent) use them on documents, including legally binding contracts - just the same as a pen-and-paper signature or initial.

ADOPT AND SIGN CANCEL

CITS DocuSign Team: \_\_\_\_\_ Date: \_\_\_\_\_

CITS Comments: \_\_\_\_\_

FINISH

Have you taken the online training classes: YES NO

Security Role Requested:  Sender  Template Sender  Template Creator

Reason for new security role: \_\_\_\_\_

Comments: \_\_\_\_\_

\*\*\*\*\*

Required - Sign Here

Signatures: 

Requester: \_\_\_\_\_ Date: 4/12/2021

Supervisor: \_\_\_\_\_ Date: \_\_\_\_\_

Type Name: \_\_\_\_\_ Email: \_\_\_\_\_

CITS DocuSign Team: \_\_\_\_\_ Date: \_\_\_\_\_

CITS Comments: \_\_\_\_\_

Updated 08/18/2020

Three ways to  
adopt a  
signature (text,  
draw, upload)

ch are required for the operation of the site. [Learn More](#)

nd add you SH LATER

### Adopt Your Signature

Confirm your name, initials, and signature.

\* Required

**Full Name\***  **Initials\***

SELECT STYLE **DRAW**            **UPLOAD** ←

**DRAW YOUR SIGNATURE** [Clear](#)

By selecting Adopt and Sign, I agree that the signature and initials will be the electronic representation of my signature and initials for all purposes when I (or my agent) use them on documents, including legally binding contracts - just the same as a pen-and-paper signature or initial.

**ADOPT AND SIGN** CANCEL

Click "Finish" to send completed document to your supervisor



ed document.

**FINISH** FINISH LATER OTHER ACTIONS ▾

Have you taken the online training classes?  YES  NO

Security Role Requested:  Sender  Template Sender  Template Creator

Reason for new security role:

Comments:

\*\*\*\*\*

**Signatures:**

Requester:   
 Date:

Supervisor:  Date:

Type Name:  Email:

CITS DocuSign Team:  Date:

CITS Comments:

Updated 08/18/2020

Change Language - English (US) | Copyright © 2021 DocuSign Inc. | V2R

Supervisor listed receives an email and is prompted to review and sign

Review and sign document(s) | x +

https://na3.docusign.net/Signing/?ti=7c0b6e7d08c147ab99e9df9c1a5dd128

This site uses cookies. **na3.docusign.net wants to** Know your location. [Learn More](#) **OK**

**Please Review**

DocuSign Internet2

UNIVERSITY of MARYLAND BALTIMORE  
Powered by DocuSign

I am requesting to have my DocuSign security role to a higher permission Level. Please review the attached DocuSign form and approve it if you do not see any issues with me having this higher permission.  
[View More](#)

Please review the documents below. **CONTINUE** OTHER ACTIONS ▾

**Requester's Email:** eyancy@umaryland.edu

**Requester's Phone:** 410-706-5022

**Requester's Department:** CITS

**Current DocuSign User?**  Yes  No

**Have you taken the online training classes?**  Yes  No

**Security Role Requested:**  Sender  Template Sender  Template Creator

**Reason for new security role:** This is a test for demonstration purposes

**Comments:** DocuSign Team: Please ignore this request

\*\*\*\*\*

**Signatures:**

# Optional: Supervisor can save signed document

The screenshot shows a web browser window displaying a DocuSign document signing interface. The browser's address bar shows the URL: <https://na3.docusign.net/Signing/?ti=7c0b6e7d08c147ab99e9df9c1a5dd128>. The page content is partially obscured by a modal dialog box titled "Save a Copy of Your Document".

The dialog box contains the following text and elements:

- A downward-pointing arrow icon.
- The text: "Your document has been signed".
- The text: "If you would like a copy for your records, select Download or Print and save."
- Three buttons: "DOWNLOAD" (highlighted in red), "PRINT", and "CLOSE".

The background document form includes the following fields:

- Comments:** A text area with "Comments: D" visible.
- Signatures:** A section with a signature line.
- Requester:** A line with a document ID "B8CAF7E700034C7..." and a date "4/12/2021".
- Supervisor:** A line with a signature "Eunissa Yancy", a document ID "0933489BA82439...", and a date "4/12/2021".
- Type Name:** "Eunissa Yancy".
- Email:** "eyancy@umaryland.edu".
- CITS DocuSign Team:** A line with a date field.
- CITS Comments:** A text area.
- Footer:** "Updated 08/18/2020".

The bottom of the browser window shows the Windows taskbar with the search bar, taskbar icons, and system tray showing the time as 3:00 PM on 4/12/2021.

After finishing, a copy will pop-up and supervisor will receive a completion notification

DocuSign Envelope ID: 40A94860-8063-48AF-AA2C-AA509837C2C5



**DocuSign Security Request Form**

**Date of Request:** 04/12/2021

**Name of Requester:** Eunissa Yancy

**Requester's Email:** eyancy@umaryland.edu

**Requester's Phone:** 410-706-5022

**Requester's Department:** CITS

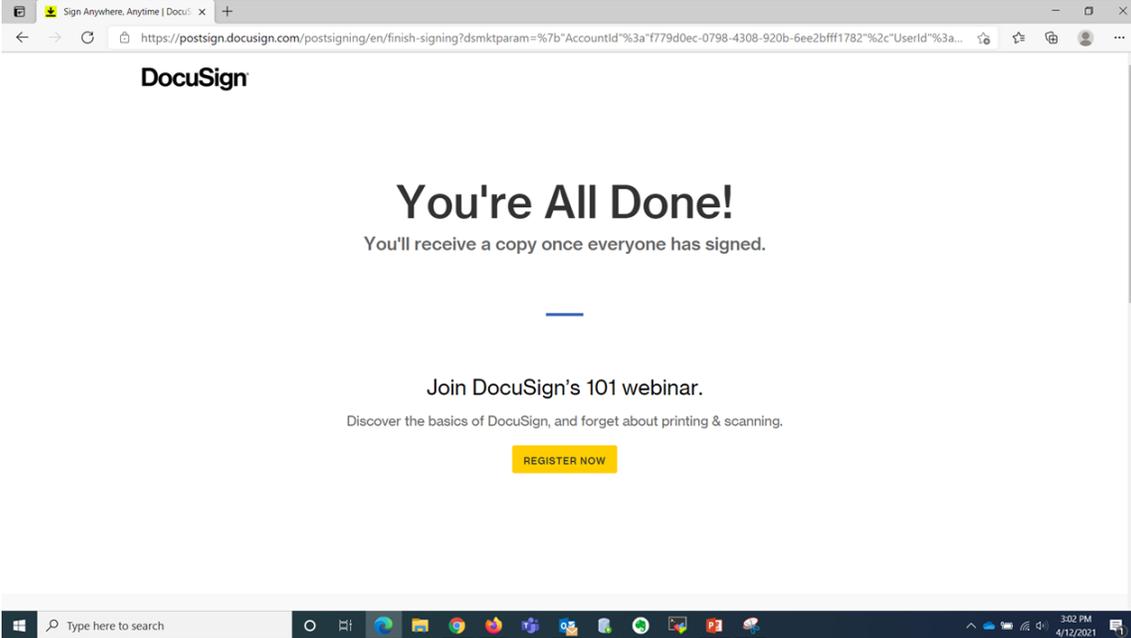
**Current DocuSign User?**  Yes  No

**Have you taken the online training classes?**  Yes  No

**Security Role Requested:**  Sender  Template Sender  Template Creator

**Reason for new security role:** This is a test for demonstration purposes

**Comments:** DocuSign Team: Please ignore this request



Sign Anywhere, Anytime | DocuSign

https://postsign.docusign.com/postsigning/en/finish-signing?dsmktparam=%7b%22AccountId%3a%27f779d0ec-0798-4308-920b-6ee2bfff1782%2c%22UserId%3a%27...&utm\_source=docusign&utm\_medium=webinar&utm\_campaign=101webinar

**DocuSign**

# You're All Done!

You'll receive a copy once everyone has signed.

Join DocuSign's 101 webinar.  
Discover the basics of DocuSign, and forget about printing & scanning.

[REGISTER NOW](#)

Type here to search

3:02 PM 4/12/2021

# DL-CITS DocuSign Support Receives Request and Approves

The screenshot displays an Outlook window titled "DocuSign Security Request Form for Eunissa Yancy - Message (HTML)". The interface includes a ribbon with "File", "Message", and "Help" tabs. The "Message" tab is active, showing various actions like "Ignore", "Delete", "Archive", "Reply", "Forward", and "More". The email header shows the sender as "DocuSign NA3 System <dse\_NA3@docuSign.net>" and the recipient as "DL-CITS DocuSign Support". The email content features the University of Maryland Baltimore logo and a yellow banner with a document icon and the text "DocuSign Support sent you a document to review and sign." Below the banner is a red button labeled "REVIEW DOCUMENT". The email body text reads: "DocuSign Support DL-CITSDocuSignSupport@umaryland.edu Please review the attached form and if it is appropriate, make the requested security change within the DocuSign application." The footer of the email states "Powered by DocuSign". The Windows taskbar at the bottom shows the time as 3:04 PM on 4/12/2021.

# Email Notification of Completed Document, Click to Review

Completed: DocuSign Security Request Form for Eunissa Yancy - Message (HTML)

File Message Help Tell me what you want to do

DocuSign NA3 System <dse\_NA3@docusign.net> Yancy, Eunissa  
Completed: DocuSign Security Request Form for Eunissa Yancy

if there are problems with how this message is displayed, click here to view it in a web browser.

DocuSign Security Request Form.docx.pdf 376 KB Summary.pdf 133 KB



**Your document has been completed**

[VIEW COMPLETED DOCUMENT](#)

**DocuSign Support**  
[DL-CITSDocuSignSupport@umaryland.edu](mailto:DL-CITSDocuSignSupport@umaryland.edu)

All parties have completed DocuSign Security Request Form for Eunissa Yancy.

I am requesting to have my DocuSign security role to a higher permission Level. Please review the attached DocuSign form and approve if you do not see any issues with me having this higher permission.

Thank you

Powered by **DocuSign**

DocuSign Envelope ID: 40A38693-8063-48AF-AA00983FC2C6

 **DocuSign Security Request Form**

Date of Request: 04/12/2021

Name of Requester: Eunissa Yancy

Requester's Email: eyancy@umaryland.edu

Requester's Phone: 410-706-5022

Requester's Department: CITS

Current DocuSign User?  Yes  No

Have you taken the online training classes?  Yes  No

Security Role Requested:  Sender  Template Sender  Template Creator

Reason for new security role: This is a test for demonstration purposes

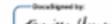
Comments: DocuSign Team: Please ignore this request

.....

**Signatures:**

Requester:  Date: 4/12/2021

Supervisor:  Date: 4/12/2021  
Type Name: Eunissa Yancy Email: eyancy@umaryland.edu

CITS DocuSign Team:  Date: 4/12/2021

CITS Comments:

Updated 08/18/2020

DocuSign Security Request Form.docx 1 of 1

# Now you have the Sender Role! Send an Envelope

Prepare Envelope | DocuSign

https://appdemo.docusign.com/prepare/48fce5a7-f102-49a1-a125-dd3f3f5ac9ee/

Upload a Document and Add Envelope Recipients

**Add Documents to the Envelope**

UPLOAD

USE A TEMPLATE

GET FROM CLOUD

**Add Recipients to the Envelope**

As the sender, you automatically receive a copy of the completed envelope.

ADD FROM CONTACTS SIGNING ORDER

Set signing order

1 Name \* NEEDS TO SIGN CUSTOMIZE

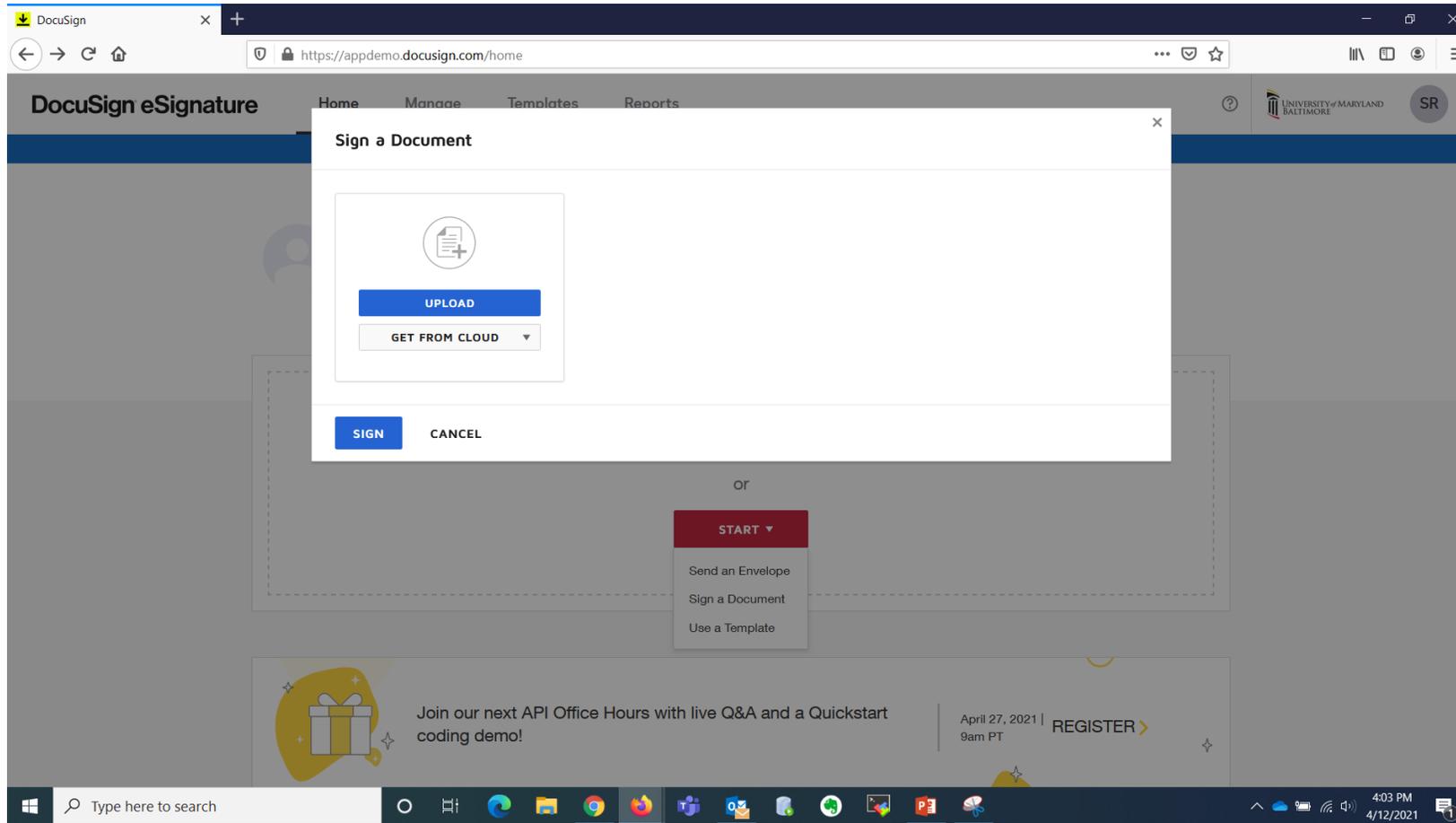
Email \*

SEND NOW NEXT

Type here to search

4:01 PM 4/12/2021

# Sign a Document



# Drag and Drop a Document to Send

The image shows a Windows File Explorer window on the left and a DocuSign eSignature web application on the right. The File Explorer window is open to the 'DocuSign' folder in OneDrive, displaying a list of files and folders. A document icon is being dragged from the File Explorer to a large blue dashed box in the DocuSign interface labeled 'Drop documents here'. The DocuSign interface shows a user profile for 'SAM Emissa' with a signature and ID '1CBFE16444524CF...'. Below the profile are four statistics: '0 Action Required', '0 Waiting for Others', '0 Expiring Soon', and '0 Completed'. At the bottom of the DocuSign interface, there is a promotional banner for 'Join our next API Office Hours with live Q&A and a Quickstart coding demo!' scheduled for April 27, 2021 at 9am PT, with a 'REGISTER >' button.

DocuSign eSignature

Home Manage Templates Reports

Developer Environment

DocuSigned by:  
SAM Emissa  
Registration  
Final Approver  
1CBFE16444524CF...

Last 6 Months

0 Action Required | 0 Waiting for Others | 0 Expiring Soon | 0 Completed

Drop documents here

Join our next API Office Hours with live Q&A and a Quickstart coding demo!

April 27, 2021 | 9am PT REGISTER >

# UMB DocuSign – How To Sign Your Own Document

## Demo: CV – Signature, Date, and Route

### Jane Doe RN, MS

1111 Grange Lane, Baltimore, MD 21201; janedoe@yahoo.com • 410.555.5555

**Certifications:** BLS, ACLS, PALS, ATCN, RYT 200

#### **Career Highlights**

University of Maryland Medical Center - R Adams Cowley Shock Trauma Center - Baltimore, MD  
Trauma Resuscitation Unit (Nov 2015 – Present)

- Swift admission and resuscitation of critically ill and injured trauma patients through rapid assessment, intervention, and management of acute injury/illness for optimal patient outcomes.
- Effectively conduct invasive monitoring; fluid resuscitation; pulmonary management; orthopedic and neurologic injury care; vasoactive medication provision; procedural sedation & pain management; organ donation procurement processes; major soft tissue infection treatment; septic, cardiogenic, hemorrhagic, and neurogenic shock management.
- Expertise in assisting emergent bedside thoracotomies, orthopedic reductions/traction, chest tube insertions, and placement of intraventricular monitoring devices.
- Compassionate care for post-op patients recovering from general, regional, and local anesthesia.

Virginia Hospital Center, Arlington, VA (Oct 2013 - Nov 2015)

Extensive patient care through the departments of Interventional Radiology, GI/Endoscopy, and Cardiac Cath lab. Provided effective conscious sedation to patients through infusion port placement. Ensured quality assistance with PEG placements; thoracentesis; paracentesis; GI hemorrhage control; stroke treatment; and trauma care. Thorough inpatient and outpatient care related to colonoscopy, upper endoscopy, and ERCP procedures, as well as cardiac arrhythmias, pacemaker and ICD implantations, IABP, and TCA/STENT/ROTOBLATOR/IVUS/LASER procedures. Independently carried out TEE; cardioversions; electrophysiology studies; tilt table studies; ablations; mapping; sheath removal; and cardiac catheterization post-op care.

Licensed Practical Nurse (2000-2014)

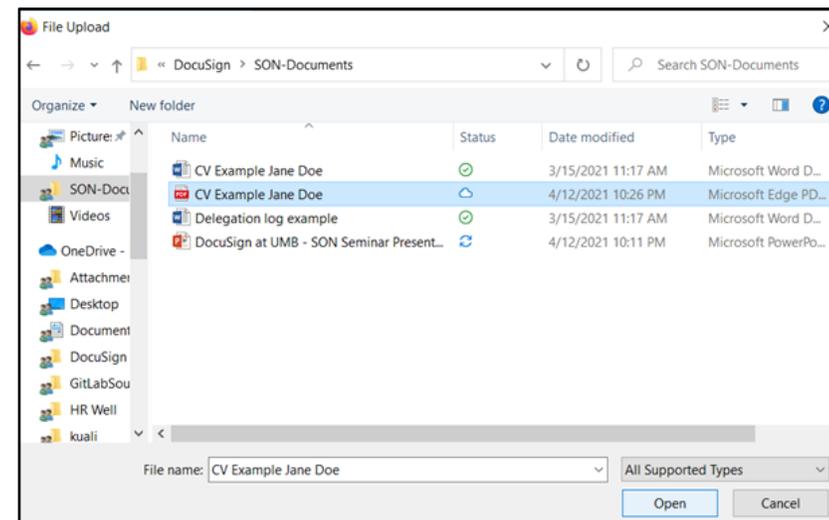
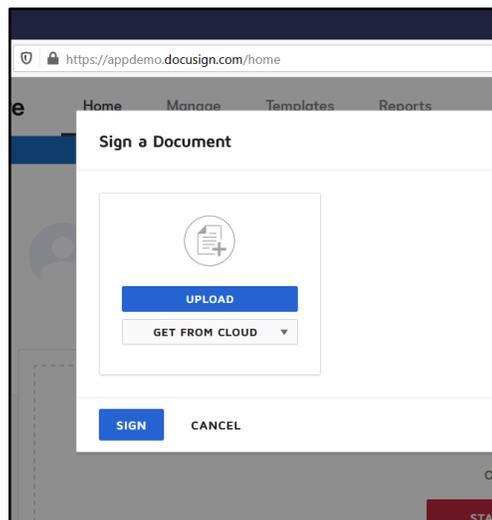
Supported diverse patient populations in Hawaii and Maryland from pediatric to geriatric, within hospitals, care facilities, and prisons. For pediatric patients, compassionate nursing and hygiene care was provided to patients with various disabilities. Served as a lead immunization nurse

Click Start →  
Sign a  
Document

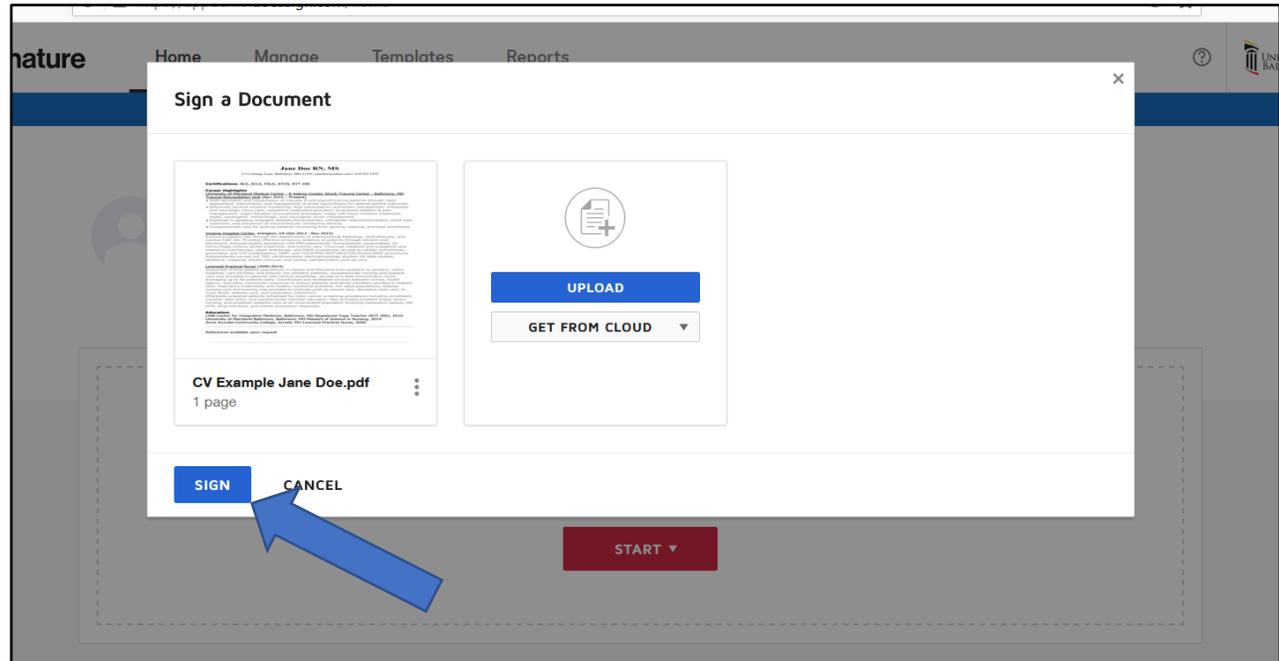
The screenshot shows the DocuSign dashboard interface. At the top left, there is a user profile icon and the text "DocuSigned by: SOM Eunissa Regstrandmal Final Approver 1CBFE16444524CF...". To the right, it says "Last 6 Months" and displays four statistics: "0 Action Required", "0 Waiting for Others", "0 Expiring Soon", and "0 Completed".

The main area is a large dashed blue box with the text "Drop documents here to get started". Inside this box, there is a "JUMPSTART YOUR WORK" section with the text "Start an envelope by dropping a document. You can also click **START** for more options." and a yellow "NEXT" button. To the right of this section is a red "START" button with a dropdown arrow. The dropdown menu is open, showing three options: "Send an Envelope", "Sign a Document", and "Use a Template". A large blue arrow points from the right towards the "Sign a Document" option in the dropdown menu.

# Upload CV Document



Click "Sign"



# Continue to Add Signature and Date Fields

Review and sign document(s) | X

https://demo.docuSign.net/Signing/?inSession=1&ti=acd31ee19fcd4964b5263addfa3ccee8

Drag and drop fields from the left panel onto the document

FINISH OTHER ACTIONS

**FIELDS**

- Signature
- Initial
- Stamp
- Date Signed**
- Name
- First Name
- Last Name
- Email Address
- Company
- Title
- Text
- Checkbox

**Jane Doe RN, MS**

1111 Grange Lane, Baltimore, MD 21201; janedoe@yahoo.com • 410.555.5555

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www.docuSign.com

**Certifications:** BLS, ACLS, PALS, ATCN, RYT 200

**Career Highlights**  
University of Maryland Medical Center - R Adams Cowley Shock Trauma Center - Baltimore, MD Trauma Resuscitation Unit (Nov 2015 – Present)

- Swift admission and resuscitation of critically ill and injured trauma patients through rapid assessment, intervention, and management of acute injury/illness for optimal patient outcomes.
- Effectively conduct invasive monitoring; fluid resuscitation; pulmonary management; orthopedic and neurologic injury care; vasoactive medication provision; procedural sedation & pain management; organ donation procurement processes; major soft tissue infection treatment; septic, cardiogenic, hemorrhagic, and neurogenic shock management.
- Expertise in assisting emergent bedside thoracotomies, orthopedic reductions/traction, chest tube insertions, and placement of intraventricular monitoring devices.
- Compassionate care for post-op patients recovering from general, regional, and local anesthesia.

Virginia Hospital Center, Arlington, VA (Oct 2013 - Nov 2015)  
Extensive patient care through the departments of Interventional Radiology, GI/Endoscopy, and Cardiac Cath lab. Provided effective conscious sedation to patients through infusion port placement. Ensured quality assistance with PEG placements; thoracentesis; paracentesis; GI hemorrhage control; stroke treatment; and trauma care. Thorough inpatient and outpatient care related to colonoscopy, upper endoscopy, and ERCP procedures, as well as cardiac arrhythmias, pacemaker and ICD implantations, IABP, and TCA/STENT/ROTOBLATOR/IVUS/LASER procedures. Independently carried out TEE; cardioversions; electrophysiology studies; tilt table studies; ablations; mapping; sheath removal; and cardiac catheterization post-op care.

Licensed Practical Nurse (2000-2014)  
Supported diverse patient populations in Hawaii and Maryland from pediatric to geriatric, within hospitals, care facilities, and prisons. For pediatric patients, compassionate nursing and hygiene

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Send CV Document

The screenshot shows a web browser window with a DocuSign interface. A modal dialog box titled "Sign and Return" is open, allowing the user to send the signed document to others. The dialog includes fields for "Full Name" and "Email Address", a "Subject" field with the text "Please DocuSign: CV Example Jane Doe.pdf", and a "Message" field with a "250 characters remaining" indicator. There are "SEND AND CLOSE" and "NO THANKS" buttons at the bottom of the dialog. The background document is partially visible, showing a "FINISH" button in the top right corner and various text elements related to a CV document.

Completed document. FINISH

### Sign and Return

Send your signed document to anyone you would like. Enter an optional email address below.

**Full Name:**  **Email Address:**

[+ADD RECIPIENT](#)

**Subject:**

**Message:**  
  
250 characters remaining

SEND AND CLOSE NO THANKS

...pleted document.

**Certifica**

**Career t**  
University  
Trauma f

- Swift a
- Effectiv
- Expert
- Compa

**Virginia t**  
Extensive  
Cardiac C  
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related to  
pacemaker and ICD implantations; IABP; and TCA SYSTEM/ROTOBATOR/IVUS/LASER procedures.  
Independently carried out TEE; cardioversions; electrophysiology studies; tilt table studies;  
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**Licensed Practical Nurse (2000-2014)**  
Supported diverse patient populations in Hawaii and Maryland from pediatric to geriatric, within  
hospitals, care facilities, and prisons. For pediatric patients, compassionate nursing and hygiene

4/12/2021

ore, MD

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anesthesia.

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Change Language - English (US) | Terms Of Use & Privacy

# CV Document In DocuSign Inbox

The screenshot displays the DocuSign eSignature web interface. The browser address bar shows the URL <https://appdemo.docusign.com/documents>. The navigation menu includes Home, Manage, Templates, and Reports. The user is logged in as 'SR' and is in a 'Developer Environment'.

The main content area is titled 'Inbox' and shows a list of documents. The document 'FYI: CV Example Jane Doe.pdf' is highlighted, with a status of 'Completed' and a last change date of '4/12/2021 11:11:33 pm'. A 'DOWNLOAD' button is visible next to the document.

Subject	Status	Last Change	
<input type="checkbox"/> <input checked="" type="checkbox"/> <b>FYI: CV Example Jane Doe.pdf</b> To: SOMEunissa Registrantmail, Eunissa Yancy	Completed	4/12/2021 11:11:33 pm	<b>DOWNLOAD</b> ▼

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# Recipient(s) Receive Email With Signed CV

The screenshot shows an email client window titled "FYI: CV Example Jane Doe.pdf - Message (HTML)". The sender is "DocuSign Demo System <dse\_demo@docusign.net>" and the recipient is "Yancy, Eunissa". The subject is "FYI: CV Example Jane Doe.pdf". A notification icon indicates that there are problems with how the message is displayed. Two PDF attachments are listed: "CV Example Jane Doe.pdf" (215 KB) and "Summary.pdf" (119 KB). The main content of the email is a document review notification from the University of Maryland School of Medicine. It features a yellow background with a document icon and the text "SOMEunissa Registrantmail sent you a copy." Below this is a red button labeled "REVIEW DOCUMENT". The sender is identified as "SOMEunissa Registrantmail" with the email address "eunissaRyancy@gmail.com". The message concludes with "Here you go." and "Powered by DocuSign". A warning at the bottom states "Do Not Share This Email" and "This email contains a secure link to DocuSign. Please do not share this email, link, or access code with others." The Windows taskbar at the bottom shows the search bar, taskbar icons, and system tray with the time 11:14 PM and date 4/12/2021.

# Click to Review Document

Recording Information - Zoom | Eunnisa Yancy's Zoom Meeting - | Review and sign document(s) | D | X

https://demo.docusign.net/Signing/?ti=58561cf2de5444dc8db99f8bb265d5d6

This document is now complete. **CLOSE** OTHER ACTIONS

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**Jane Doe RN, MS**  
1111 Grange Lane, Baltimore, MD 21201; janedoe@yahoo.com • 410.555.5555

DocuSigned by:  
*SAM Eunnisa Registra@mail* 4/12/2021  
ICBFE10444524CF

**Certifications:** BLS, ACLS, PALS, ATCN, RYT 200

**Career Highlights**  
University of Maryland Medical Center - R Adams Cowley Shock Trauma Center - Baltimore, MD Trauma Resuscitation Unit (Nov 2015 – Present)

- Swift admission and resuscitation of critically ill and injured trauma patients through rapid assessment, intervention, and management of acute injury/illness for optimal patient outcomes.
- Effectively conduct invasive monitoring; fluid resuscitation; pulmonary management; orthopedic and neurologic injury care; vasoactive medication provision; procedural sedation & pain management; organ donation procurement processes; major soft tissue infection treatment; septic, cardiogenic, hemorrhagic, and neurogenic shock management.
- Expertise in assisting emergent bedside thoracotomies, orthopedic reductions/traction, chest tube insertions, and placement of intraventricular monitoring devices.
- Compassionate care for post-op patients recovering from general, regional, and local anesthesia.

Virginia Hospital Center, Arlington, VA (Oct 2013 - Nov 2015)  
Extensive patient care through the departments of Interventional Radiology, GI/Endoscopy, and Cardiac Cath lab. Provided effective conscious sedation to patients through infusion port placement. Ensured quality assistance with PEG placements; thoracentesis; paracentesis; GI hemorrhage control; stroke treatment; and trauma care. Thorough inpatient and outpatient care related to colonoscopy, upper endoscopy, and ERCP procedures, as well as cardiac arrhythmias, pacemaker and ICD implantations, IABP, and TCA/STENT/ROTOBLATOR/IVUS/LASER procedures. Independently carried out TEE; cardioversions; electrophysiology studies; tilt table studies; ablations; mapping; sheath removal; and cardiac catheterization post-op care.

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GMT20210413-023...m4a ... GMT20210413-023...mp4 ... GMT20210413-023...m4a ... GMT20210413-023...mp4 ... Show all X

Type here to search | 11:16 PM 4/12/2021

# How to Send a Document for Multiple Signature(s): Delegation Log Example

- PI uploads delegation log from computer into DocuSign
- Tip: Have delegates' names and email addresses handy for routing
- PI adds delegates names and email address to recipient fields in DocuSign
- PI adds initial and signature fields to respective places on delegation log
- PI sends envelope
- Delegates receive request to sign simultaneously (assuming the order of their signature doesn't matter)
- After delegates have all signed the log, then PI will initial the log affirming delegations
- Now the document is complete, and all signing recipients will receive a copy of the completed log
- **Note:** PI will then have a signed log to sign after study is complete :-)

# Click Start → Send an Envelope

Last 6 Months

 DocuSigned by:  
*SOM Emissa Registrantmail*  
1CBFE16444524CF...

0 Action Required	0 Waiting for Others	0 Expiring Soon	3 Completed
----------------------	-------------------------	--------------------	----------------

Drop documents here to get started

or

**START** ▾

- Send an Envelope
- Sign a Document
- Use a Template



# Upload Delegation Log

**Add Documents to the Envelope**



**UPLOAD**

**USE A TEMPLATE**

**GET FROM CLOUD** ▼



« DocuSign » SON-Documents

New folder

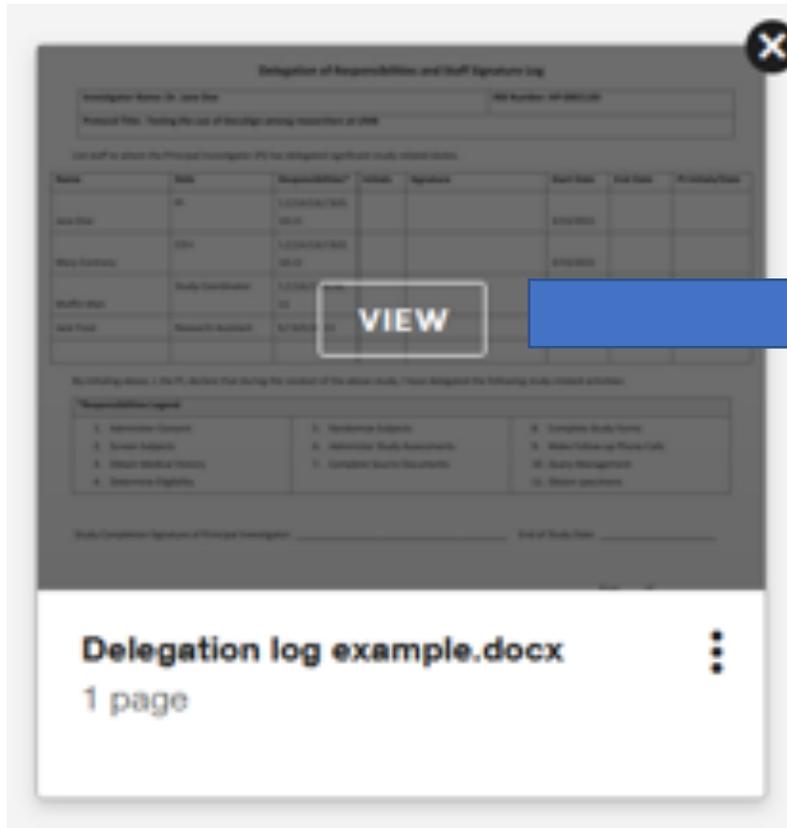
Name	Status	Date modified
CV Example Jane Doe	✓	3/15/2021 11:17 AM
CV Example Jane Doe	✓	4/12/2021 10:26 PM
Delegation log example	✓	3/15/2021 11:17 AM
<b>Delegation_log_example.docx</b>	✓	4/13/2021 2:53 PM
DocuSign at UMB - SON Seminar Present...	✓ R	4/14/2021 6:29 PM
DocuSign at UMB - SON Seminar Present...	✓	4/12/2021 11:22 PM
DocuSign at UMB - SON Seminar Present...	↻	4/14/2021 7:11 AM

File name: Delegation\_log\_example.docx

All Supported Type

Open

# View Delegation Log



## Delegation log example.docx

Free-Form Sign

**Delegation of Responsibilities and Staff Signature Log**

Investigator Name: Dr. Jane Doe	IRB Number: HP-00011XX
Protocol Title: Testing the use of DocuSign among researchers at UMB	

List staff to whom the Principal Investigator (PI) has delegated significant study-related duties.

Name	Role	Responsibilities*	Initials	Signature	Start Date	End Date	PI Initials/Date
Jane Doe	PI	1,2,3,4,5,6,7,8,9,10,11			3/15/2021		
★ Mary Contrary	CO-I	1,2,3,4,5,6,7,8,9,10,11			3/15/2021		
★ Muffin Man	Study Coordinator	1,2,3,6,7,8,9,10,11			3/15/2021		
★ Jack Frost	Research Assistant	6,7,8,9,10, 11			4/1/2021		

★ **Tip:** Have delegates' names and email addresses handy for routing

# Add Names and Email Addresses for PI and Delegates

**Note:** By default, only one recipient field is displayed. Click "ADD RECIPIENT" for additional recipient needed

Set signing order

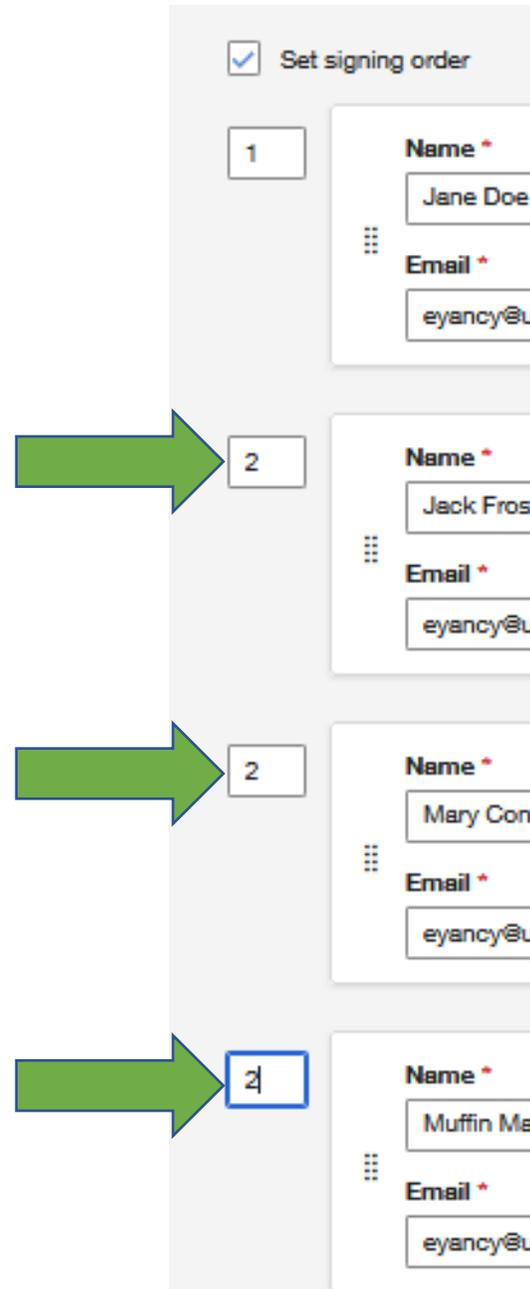
1	<p><b>Name *</b></p> <input type="text" value="Jane Doe - PI"/>		NEEDS TO SIGN ▾	CUSTOMIZE ▾
	<p><b>Email *</b></p> <input type="text" value="eyancy@umaryland.edu"/>			
2	<p><b>Name *</b></p> <input type="text" value="Jack Frost - Research Assistant"/>		NEEDS TO SIGN ▾	CUSTOMIZE ▾
	<p><b>Email *</b></p> <input type="text" value="eyancy@umaryland.edu"/>			
2	<p><b>Name *</b></p> <input type="text" value="Mary Contrary - CO-I"/>		NEEDS TO SIGN ▾	CUSTOMIZE ▾
	<p><b>Email *</b></p> <input type="text" value="eyancy@umaryland.edu"/>			
2	<p><b>Name *</b></p> <input type="text" value="Muffin Man - Study Coordinator"/>		NEEDS TO SIGN ▾	CUSTOMIZE ▾
	<p><b>Email *</b></p> <input type="text" value="eyancy@umaryland.edu"/>			
3	<p><b>Name *</b></p> <input type="text" value="Jane Doe - PI"/>		NEEDS TO SIGN ▾	CUSTOMIZE ▾
	<p><b>Email *</b></p> <input type="text" value="eyancy@umaryland.edu"/>			

ADD RECIPIENT    ADD CONDITIONAL RECIPIENT

# Change the signing order for the delegates

Set signing order

1	<b>Name *</b> Jane Doe
	⋮
	<b>Email *</b> eyancy@u
2	<b>Name *</b> Jack Frost
	⋮
	<b>Email *</b> eyancy@u
2	<b>Name *</b> Mary Conl
	⋮
	<b>Email *</b> eyancy@u
2	<b>Name *</b> Muffin Ma
	⋮
	<b>Email *</b> eyancy@u



**Note:** When the signing order value is the same as another recipient, then the signature request will be sent at the same time. Thereby avoiding the dependency of any one delegate slowing down the routing of the log to other delegates.

# Customize email message for context

Choose a custom  
message  
per recipient

Choose to have all  
recipients receive  
the same email

## Message to All Recipients

Custom email and language for each recipient

To: Jane Doe - Pi

**Email Language \***

English (US)

**Email Subject \***

Please DocuSign: Delegation\_log\_example.docx.pdf

Characters remaining: 52

**Email Message**

Just for Jane Doe

Characters remaining: 9983

To: Jack Frost - Research Assistant

**Email Language \***

English (US)

**Email Subject \***

Please DocuSign: Delegation\_log\_example.docx.pdf

Characters remaining: 52

**Email Message**

Just for Jack Frost

Characters remaining: 9981

## Message to All Recipients

Custom email and language for each recipient

**Email Subject \***

Please DocuSign: Delegation\_log\_example.docx.pdf

Characters remaining: 52

**Email Message**

This message will be sent to all recipients listed above

Characters remaining: 9944

# Add Initial and Signature Fields to Delegation Log

Please DocuSign: Delegation log example.docx

ACTIONS RECIPIENT PREVIEW SEND

Jane Doe - PI

Search Fields

**Standard Fields**

- Signature
- Initial
- Stamp
- Date Signed
- Name
- Email
- Company
- Title
- Text
- Checkbox
- Dropdown
- Radio
- Payment Item

**Delegation of Responsibilities and Staff Signature Log**

Investigator Name: Dr. Jane Doe		IRB Number: HP-00011XX	
Protocol Title: Testing the use of DocuSign among researchers at UMB			

List staff to whom the Principal Investigator (PI) has delegated significant study-related duties.

Name	Role	Responsibilities*	Initials	Signature	Start Date	End Date	PI Initials/Date
Jane Doe	PI	1,2,3,4,5,6,7,8,9,10,11			3/15/2021		
Mary Contrary	CO-I	1,2,3,4,5,6,7,8,9,10,11			3/15/2021		
Muffin Man	Study Coordinator	1,2,3,6,7,8,9,10,11			3/15/2021		
Jack Frost	Research Assistant	6,7,8,9,10, 11			4/1/2021		

By initialing above, I, the PI, declare that during the conduct of the above study, I have delegated the following study-related activities:

<b>*Responsibilities Legend</b>		
1. Administer Consent	5. Randomize Subjects	8. Complete Study Forms

Documents

Delegation log exampl... ^

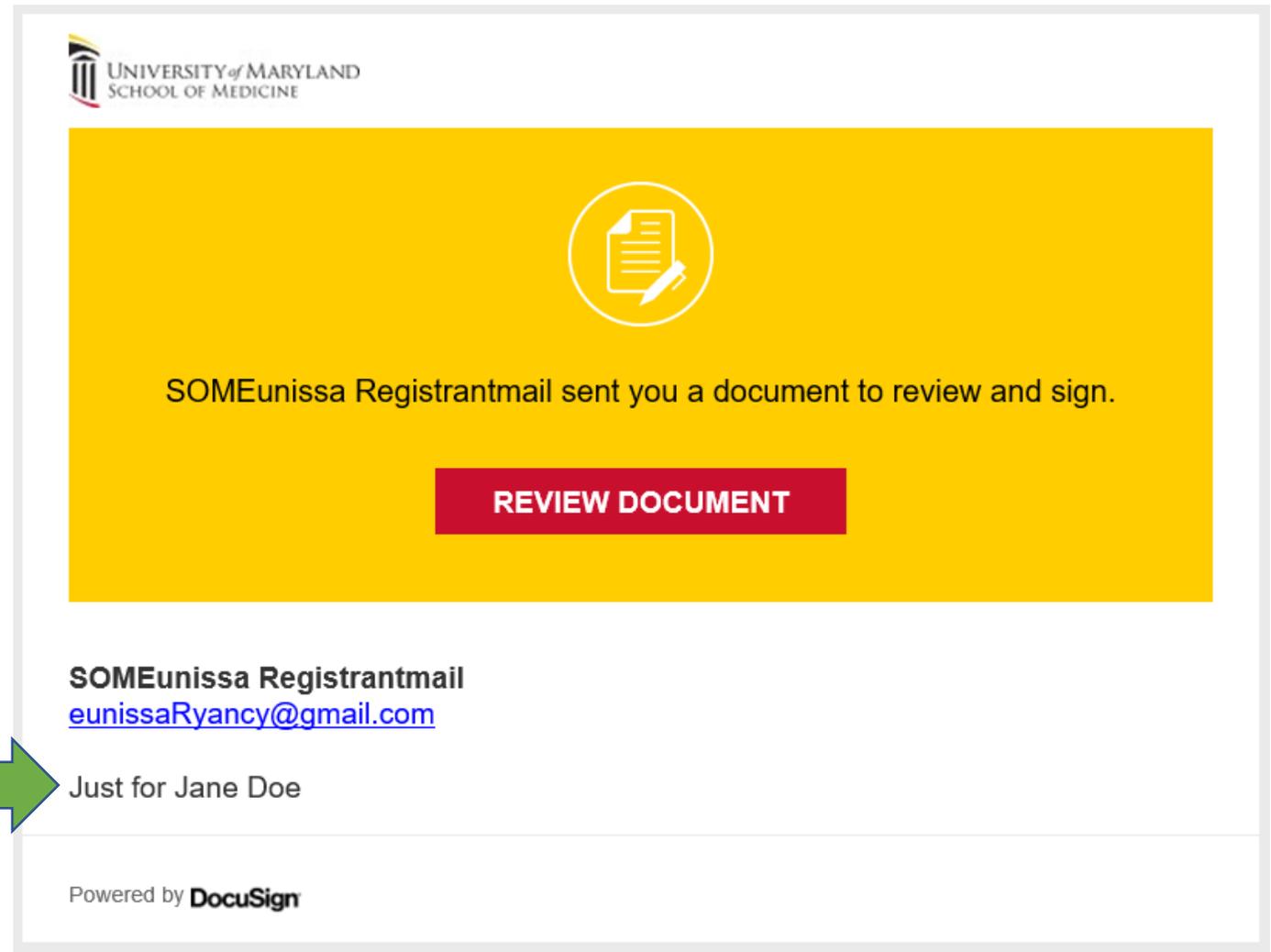
Pages: 1

1

BACK SEND

# PI Receives Email Request

Here is where we  
see the custom  
email message



 UNIVERSITY of MARYLAND  
SCHOOL OF MEDICINE



SOMEunissa Registrantmail sent you a document to review and sign.

**REVIEW DOCUMENT**

**SOMEunissa Registrantmail**  
[eunissaRyancy@gmail.com](mailto:eunissaRyancy@gmail.com)

Just for Jane Doe

Powered by **DocuSign**

# PI Initials and Signs Delegation Log as First Delegate

Please review the documents below.

FINISH



START

DocuSign Envelope ID: 52FF506C-CD87-4EA1-AC21-3E6145DE294E

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www.docusign.com

## Delegation of Responsibilities and Staff Signature Log

Investigator Name: Dr. Jane Doe

IRB Number: HP-00011XX

Protocol Title: Testing the use of DocuSign among researchers at UMB

List staff to whom the Principal Investigator (PI) has delegated significant study-related duties.

Name	Role	Responsibilities*	Initials	Signature	Start Date	End Date	PI Initials/Date
Jane Doe	PI	1,2,3,4,5,6,7,8,9, 10,11	Initial ↓	Sign ↓	3/15/2021		
Mary Contrary	CO-I	1,2,3,4,5,6,7,8,9, 10,11			3/15/2021		
Muffin Man	Study Coordinator	1,2,3,6,7,8,9,10, 11			3/15/2021		
Jack Frost	Research Assistant	6,7,8,9,10, 11			4/1/2021		

# Delegates receive the request to sign simultaneously

Search Current Mailbox  Current Mailbox

Reply Reply All Forward

DD DocuSign Demo System <dse\_demo@docusign.net> | Yancy, Eunissa

**Please DocuSign: Delegation log example.docx**

ⓘ If there are problems with how this message is displayed, click here to view it in a web browser.

 UNIVERSITY of MARYLAND BALTIMORE



**Left Sidebar:**

- Favorites
  - Inbox [12585]
  - Clutter 17
  - Unread Mail 364
  - Sent Items
- eyancy@umaryland.edu
  - Inbox [12585]
  - Drafts [2]
  - Sent Items
  - Deleted Items 982
  - Archive 17
  - Clutter 17
  - Conversation History

**Message List:**

From	Subject	Time
SOMEunissa Registran...	Please DocuSign: Delegation...	2:23 PM
SOMEunissa Registran...	Please DocuSign: Delegation...	2:23 PM
SOMEunissa Registran...	Please DocuSign: Delegation...	2:23 PM
SOMEunissa Registran...	Please DocuSign: Delegation lo...	2:12 PM

# Manage Sent Delegation

The screenshot displays the DocuSign eSignature web application interface. The browser address bar shows the URL <https://appdemo.docusign.com/documents?view=sent>. The page title is "DocuSign eSignature" and the user is logged in as "SR". The main content area is titled "Sent" and shows a list of documents. The list is filtered by "Date (Last 6 Months)".

Subject	Status	Last Change	Actions
<input type="checkbox"/> <a href="#">Please DocuSign: Delegation log example.docx</a> To: PI Initiator Role, CO - I Role +2 more	0/4 done Waiting for Others	4/13/2021 02:12:12 pm	RESEND
<input type="checkbox"/> <a href="#">FYI: CV Example Jane Doe.pdf</a> To: SOMEunissa Registrantmail, Eunissa Yancy	Completed	4/12/2021 11:11:33 pm	DOWNLOAD

Looking for more? | [Edit your filters](#)

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# See Delegation Status

**DocuSign eSignature** Home Manage Templates Reports

Developer Environment

### Please DocuSign: Delegation log example.docx

**Envelope ID**  
Last change on 4/13/2021 | 02:12:12 pm  
Sent on 4/13/2021 | 02:12:12 pm

**Waiting for Others**

RESEND MOVE CORRECT MORE

#### Recipients

	CURRENT	SIGNING ORDER
1	<b>PI Initiator Role</b> eyancy@umaryland.edu	Needs to Sign
	<b>CO - I Role</b> eyancy@umaryland.edu	Needs to Sign
2	<b>Research Assistant Role</b> eyancy@umaryland.edu	Needs to Sign
	<b>Study Coordinator Role</b> eyancy@umaryland.edu	Needs to Sign

#### Message

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2:15 PM  
4/13/2021

# Signers see who has already signed

Please review the documents below.

FINISH



START

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## Delegation of Responsibilities and Staff Signature Log

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www.docusign.com

Investigator Name: Dr. Jane Doe

IRB Number: HP-00011XX

Protocol Title: Testing the use of DocuSign among researchers at UMB

List staff to whom the Principal Investigator (PI) has delegated significant study-related duties.

Name	Role	Responsibilities*	Initials	Signature	Start Date	End Date	PI Initials/Date
Jane Doe	PI	1,2,3,4,5,6,7,8,9, 10,11		 <small>DocuSigned by: 380FB5DCB5FC41B...</small>	3/15/2021		
Mary Contrary	CO-I	1,2,3,4,5,6,7,8,9, 10,11		 <small>DocuSigned by: 380FB5DCB5FC41B...</small>	3/15/2021		
Muffin Man	Study Coordinator	1,2,3,6,7,8,9,10, 11			3/15/2021		
Jack Frost	Research Assistant	6,7,8,9,10, 11			4/1/2021		

# All delegates have initialed and signed

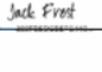
DocuSign Envelope ID: 52FF506C-CD87-4EA1-AC21-3E6145DE294E

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Muffin Man	Study Coordinator	1,2,3,6,7,8,9,10,11			3/15/2021		
Jack Frost	Research Assistant	6,7,8,9,10, 11			4/1/2021		

By initialing above, I, the PI, declare that during the conduct of the above study, I have delegated the following study-related activities:

*Responsibilities Legend		
1. Administer Consent	5. Randomize Subjects	8. Complete Study Forms
2. Screen Subjects	6. Administer Study Assessments	9. Make Follow-up Phone Calls
3. Obtain Medical History	7. Complete Source Documents	10. Query Management

# PI Receives Request to Finalize Delegation Once All Study Staff Have Signed

UNIVERSITY of MARYLAND  
SCHOOL OF MEDICINE

SOMEunissa Registrantmail sent you a document to review and sign.

**REVIEW DOCUMENT**

**SOMEunissa Registrantmail**  
[eunissaRyancy@gmail.com](mailto:eunissaRyancy@gmail.com)

Back to you, Jane Doe, all delegates have signed time for you to initial the delegation log

Powered by **DocuSign**

**Note:** the custom email message



# All signers receive email that document signing is complete

Search Current Mailbox  Current Mailbox

All Unread By Date  ↑

Today

- SOMEunissa Registran...  
Completed: Please DocuSign... 2:45 PM
- SOMEunissa Registran...  
Completed: Please DocuSign... 2:45 PM
- SOMEunissa Registran...  
Completed: Please DocuSign: ... 2:45 PM
- SOMEunissa Registran...  
Completed: Please DocuSign... 2:45 PM

Reply Reply All Forward

DD DocuSign Demo System <dse\_demo@docusign.net> Yancy, Eunissa

**Completed: Please DocuSign: Delegation log example.docx**

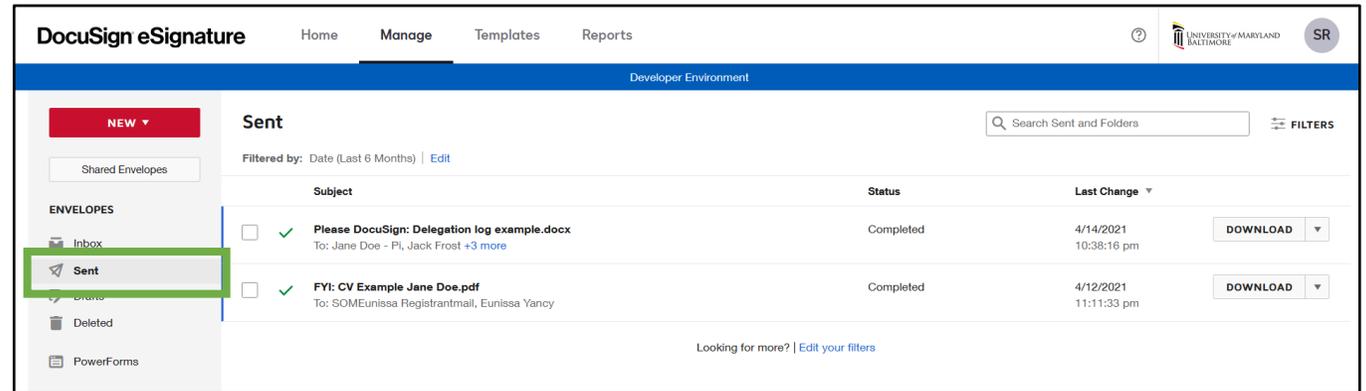
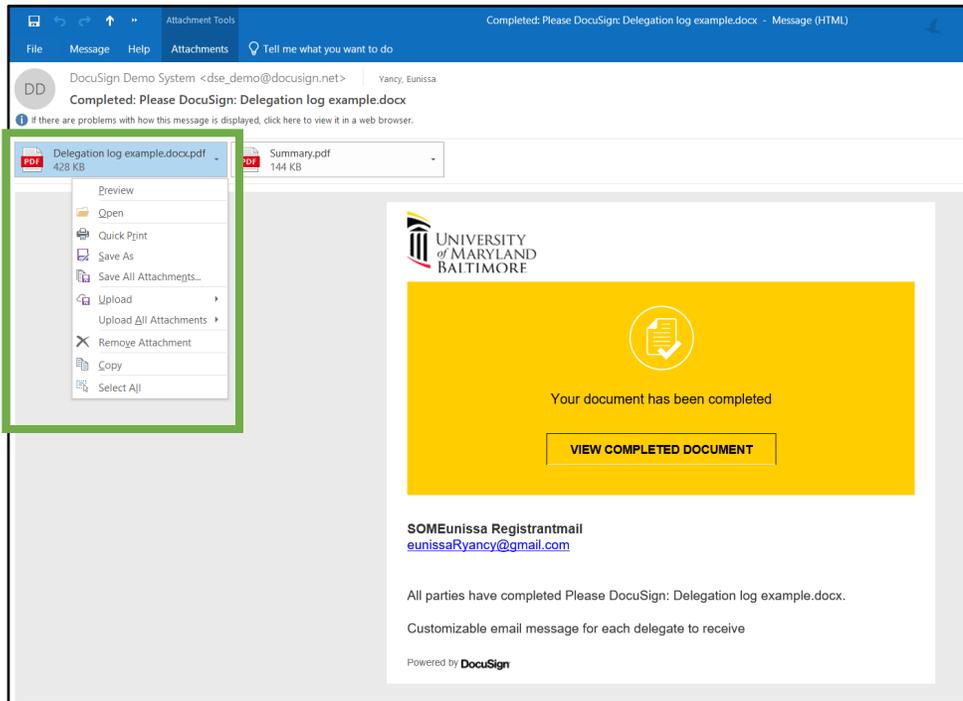
*i* If there are problems with how this message is displayed, click here to view it in a web browser.

Delegation log example.docx.pdf 428 KB Summary.pdf 144 KB

 UNIVERSITY of MARYLAND BALTIMORE



# Download signed document directly from email or DocuSign



# Ta-Da A Completed Delegation Log

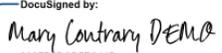
DocuSign Envelope ID: 52FF506C-CD87-4EA1-AC21-3E6145DE294E

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## Delegation of Responsibilities and Staff Signature Log

Investigator Name: Dr. Jane Doe	IRB Number: HP-00011XX
Protocol Title: Testing the use of DocuSign among researchers at UMB	

List staff to whom the Principal Investigator (PI) has delegated significant study-related duties.

Name	Role	Responsibilities*	Initials	Signature	Start Date	End Date	PI Initials/Date
Jane Doe	PI	1,2,3,4,5,6,7,8,9,10,11			3/15/2021		
Mary Contrary	CO-I	1,2,3,4,5,6,7,8,9,10,11			3/15/2021		
Muffin Man	Study Coordinator	1,2,3,6,7,8,9,10,11			3/15/2021		
Jack Frost	Research Assistant	6,7,8,9,10, 11			4/1/2021		

By initialing above, I, the PI, declare that during the conduct of the above study, I have delegated the following study-related activities:

*Responsibilities Legend		
1. Administer Consent	5. Randomize Subjects	8. Complete Study Forms
2. Screen Subjects	6. Administer Study Assessments	9. Make Follow-up Phone Calls
3. Obtain Medical History	7. Complete Source Documents	10. Query Management
4. Determine Eligibility		11. Obtain specimens

# Things to Note for Research- Regulatory Binder

- This presentation tailored to signatures needed in a regulatory binder for non-sponsored, non-FDA regulated research. There is another UMB for-fee DocuSign version (21CFR11 compliant) available for FDA regulated studies.
- Some sponsors may be ok with using this version of DocuSign to complete signatures needed for regulatory documents, ask before using!
- HHS funded studies? No regulations in 45CFR46 that speak to electronic signatures, but always ask before using!

# Things to Note for Research- Consent Forms

-Currently UMB has not approved DocuSign to collect e-Consent. Potential in future is hoped for!

-Although HIPAA compliant, UMB has not approved DocuSign to collect e-HIPAA Consent for research.

# Things to Note for Research- Applicability Summary

FDA Regulated - Cannot use basic DocuSign (not 21CFR11 compliant)

HHS Funded- No regulations in 45CFR46 regarding electronic signatures

Sponsor Funded – Ask!

Department Funded – Ask!

# Thank You ... Questions???

- **DocuSign UMB Support**

- If you have questions or issues using DocuSign, please send an email to: [DL-CITSDocuSignSupport@umaryland.edu](mailto:DL-CITSDocuSignSupport@umaryland.edu)
- Or contact the IT Help Desk at [help@umaryland.edu](mailto:help@umaryland.edu) - (410) 706-4357 (HELP)