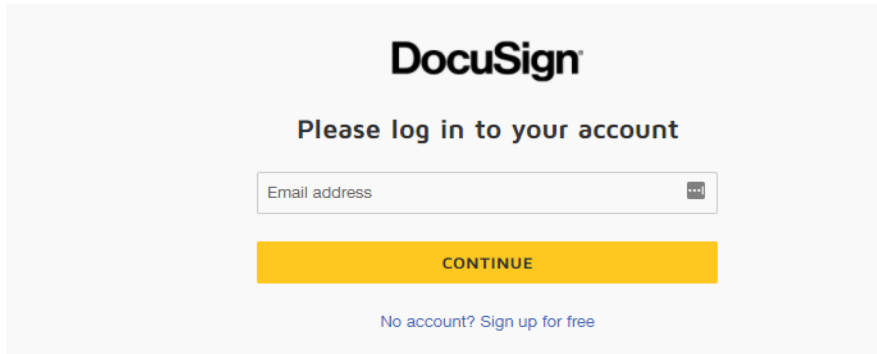


# Instructions for using DocuSign for eConsents(Part 11):

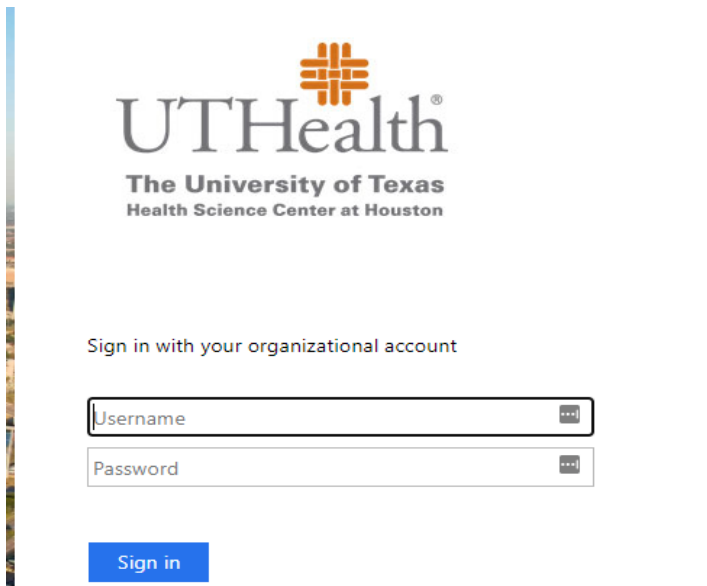
Sign into [DocuSign](#)

Enter work email



The image shows the DocuSign login interface. At the top, the DocuSign logo is displayed. Below it, the text "Please log in to your account" is centered. There is a text input field labeled "Email address" with a small icon on the right. Below the input field is a prominent yellow button labeled "CONTINUE". At the bottom of the form, there is a link that says "No account? Sign up for free".

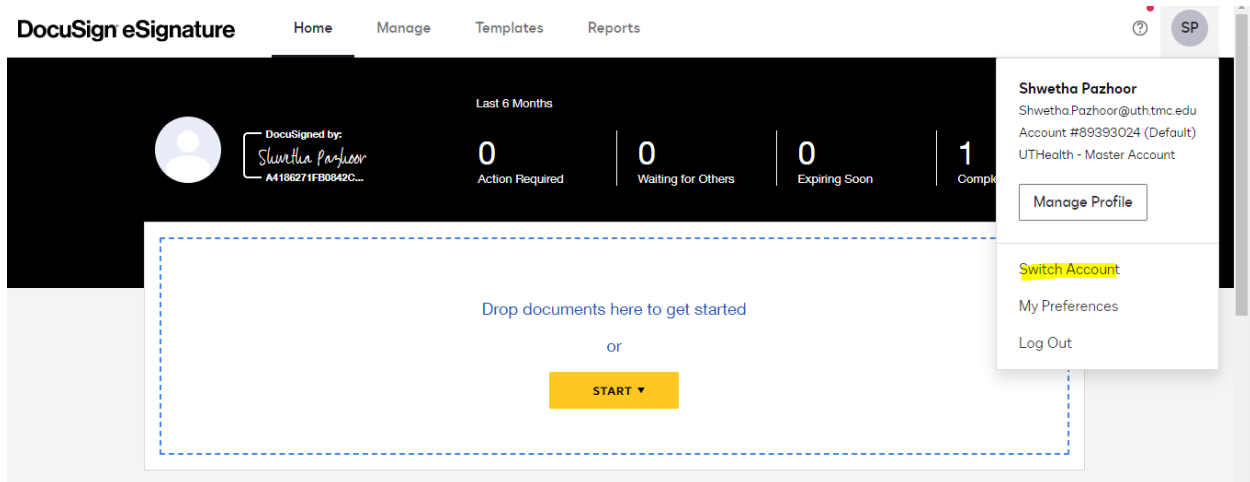
Sign in using UTH user name and password



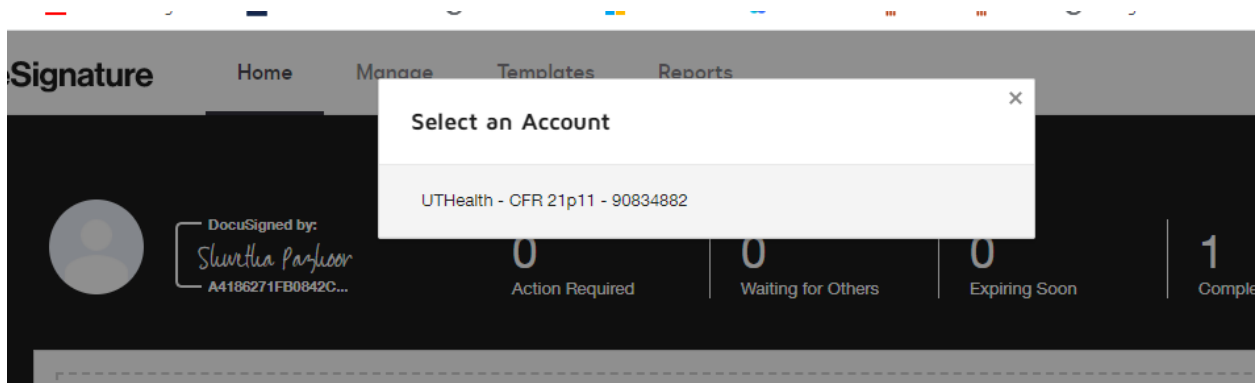
The image shows the login screen for an organizational account at UTHealth. At the top, the UTHealth logo is displayed, which includes the text "UTHealth" and "The University of Texas Health Science Center at Houston". Below the logo, the text "Sign in with your organizational account" is centered. There are two text input fields: "Username" and "Password", each with a small icon on the right. Below the input fields is a blue button labeled "Sign in".

If you are not logged into the part 11 component of DocuSign click on your profile and switch account

# Instructions for using DocuSign for eConsents(Part 11):



Select the CFR21p11 account



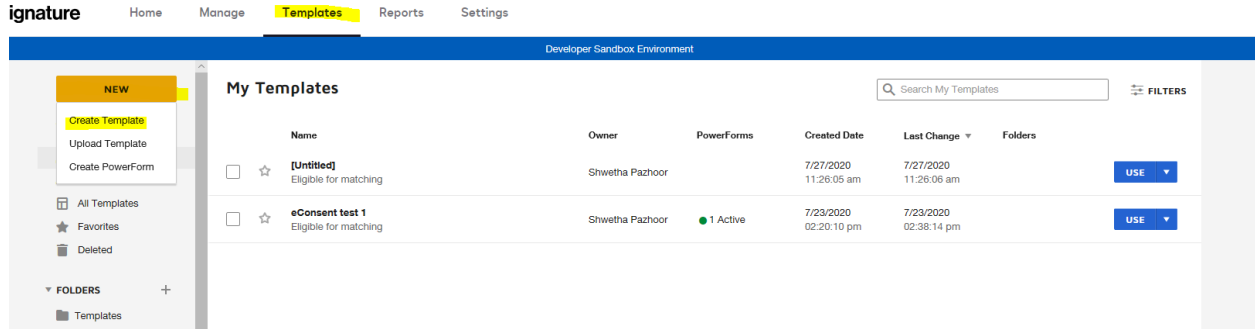
Confirm it is part 11 module



How to set up eConsent in DocuSign:

Click on "Templates" and "NEW" and select "Create Template"

# Instructions for using DocuSign for eConsents(Part 11):



Name template and upload consent document

# Instructions for using DocuSign for eConsents(Part 11):

How to send a document

Click on start

Select document needed

Add selected

Add recipients

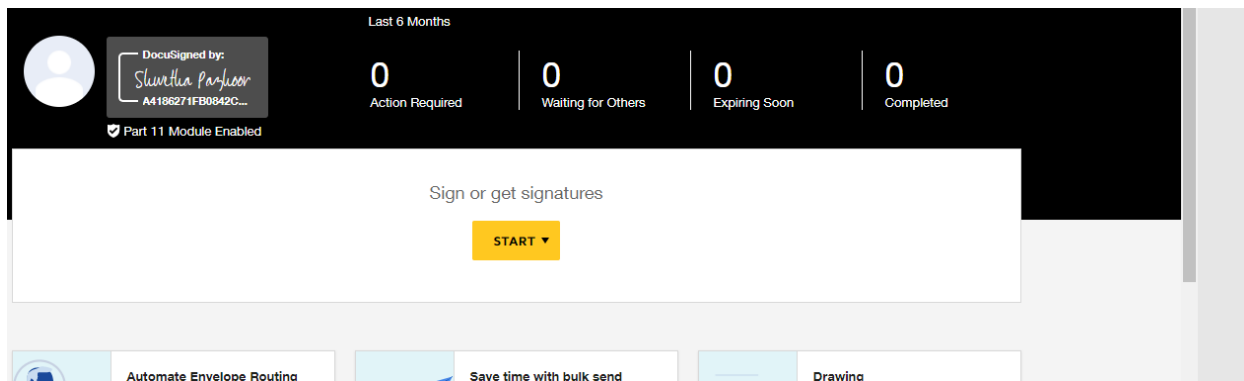
Add signing order

Enter subject and message

Next

Assign signature fields

Send now



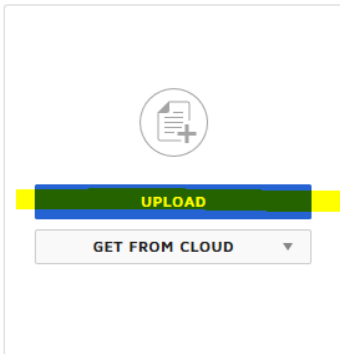
# Instructions for using DocuSign for eConsents(Part 11):

## Template Name and Description

eConsent for HSC-MS-20-000

Template Description (optional)

## Add Documents to the Envelope



The interface for adding documents to an envelope. It features a central icon of a document with a plus sign inside a circle. Below the icon are two buttons: a green 'UPLOAD' button and a grey 'GET FROM CLOUD' button with a dropdown arrow.

Save and close

# Instructions for using DocuSign for eConsents(Part 11):

Add recipients to envelope (make sure signing order is checked)

## Add Recipients to the Envelope

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

LOOKII

Set signing order

1	<p><b>Role</b></p> <input type="text" value="Participant"/>	<b>NEEDS TO SIGN</b>	<b>MORE</b> ▾
	<p><b>Name</b></p> <input type="text" value="John Doe"/>		
	<p><b>Email</b></p> <input type="text" value="johndoe@xxx.com"/>		
2	<p><b>Role</b></p> <input type="text" value="Person Obtaining Consent"/>	<b>NEEDS TO SIGN</b>	<b>MORE</b> ▾
	<p><b>Name</b></p> <input type="text" value="Jane D"/>		
	<p><b>Email</b></p> <input type="text" value="janed@xxx.com"/>		
3	<p><b>Role</b></p> <input type="text" value="PI"/>	<b>CC RECEIVES A COPY</b>	<b>MORE</b> ▾
	<p><b>Name</b></p> <input type="text" value="Dr XXX"/>		
	<p><b>Email</b></p> <input type="text" value="drxxx@yyy.com"/>		

---


# Instructions for using DocuSign for eConsents(Part 11):

Message to all recipients:

### Message to All Recipients

Custom email and language for each recipient

**Email Subject**

Please DocuSign: 

Characters remaining: 100

**Email Message**



Enter Message

Characters remaining: 10000



Click on NEXT:

**Add Recipients to the Envelope**

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

LOOKING FOR IMPORT BULK LIST?  ADD FROM CONTACTS  SIGNING ORDER

Set signing order

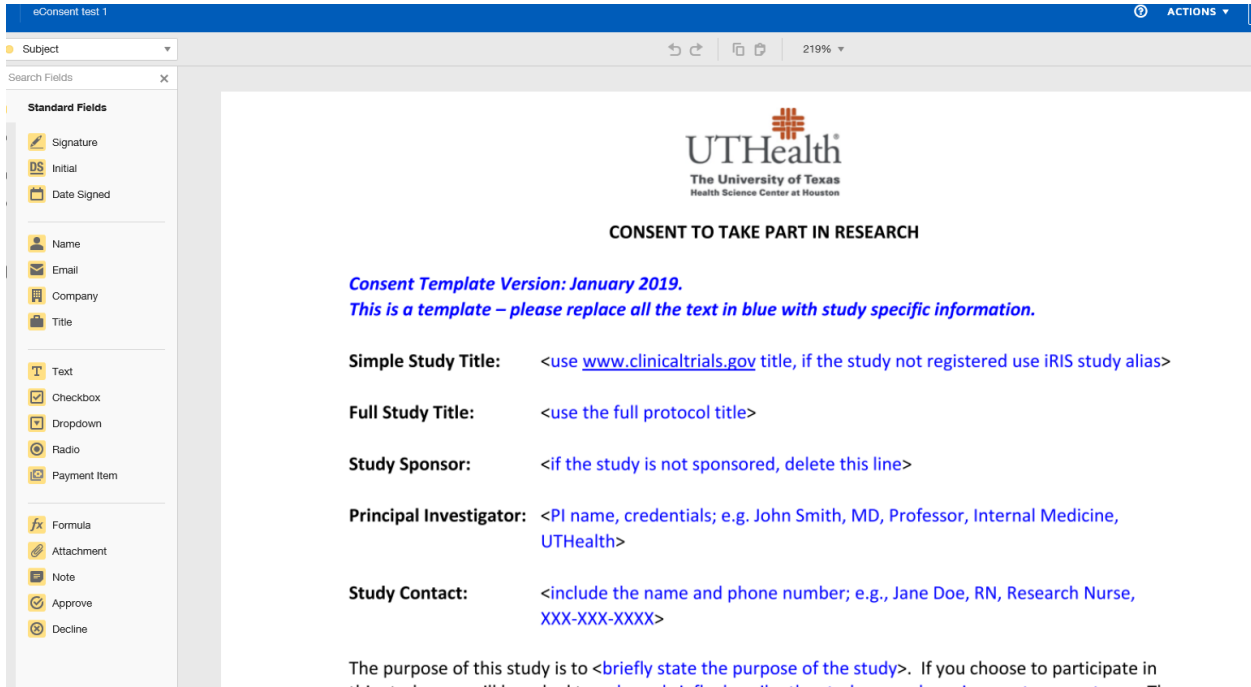
1	Role	 NEEDS TO SIGN	 MORE
	Participant		
	Name		

SAVE AND CLOSE **NEXT**

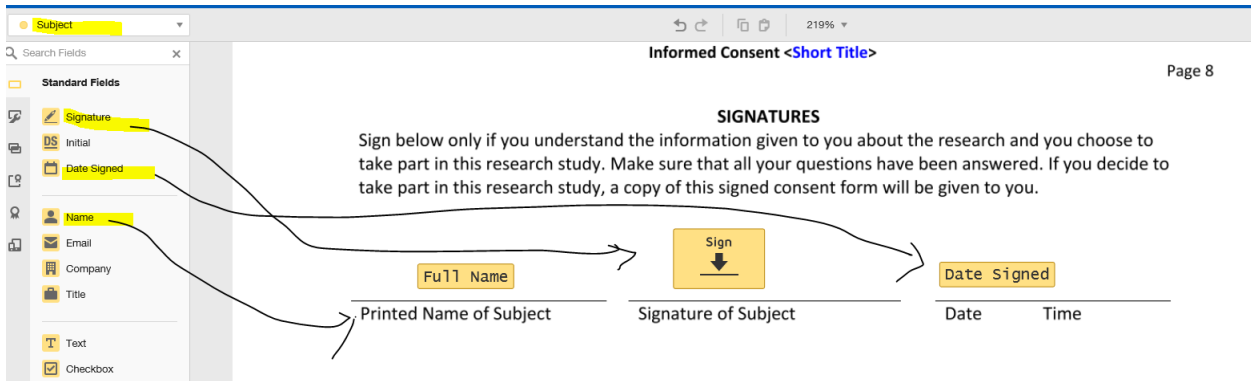
11:32 AM

# Instructions for using DocuSign for eConsents(Part 11):

This will take you to the consent document that was uploaded:



Go to bottom of the ICF where signatures are needed-now you can drag the signature,date signed and name form left hand side list(Standard Fields) to the appropriate location(make sure subject is selected in the top drop down)





# Instructions for using DocuSign for eConsents(Part 11):

Repeat steps for person obtaining consent

The screenshot shows the DocuSign interface for an "Informed Consent" document. The left sidebar lists "Standard Fields" including Signatures, Initial, Date Signed, Name, Email, Company, Title, Text, Checkbox, Dropdown, Radio, Payment Item, Formula, Attachment, Note, Approve, and Decline. The main content area is titled "SIGNATURES" and contains the following text: "Sign below only if you understand the information given to you about the research and you choose to take part in this research study. Make sure that all your questions have been answered. If you decide to take part in this research study, a copy of this signed consent form will be given to you." Below this text are three signature rows. Each row has a "Full Name" field, a "Sign" button, and a "Date Signed" field. The first row is for the "Printed Name of Subject", the second for the "Printed Name of Legally Authorized Representative", and the third for the "Printed Name of Person Obtaining Informed Consent". Arrows from the sidebar point to the "Signatures", "Date Signed", "Name", and "Full Name" fields in the signature rows.

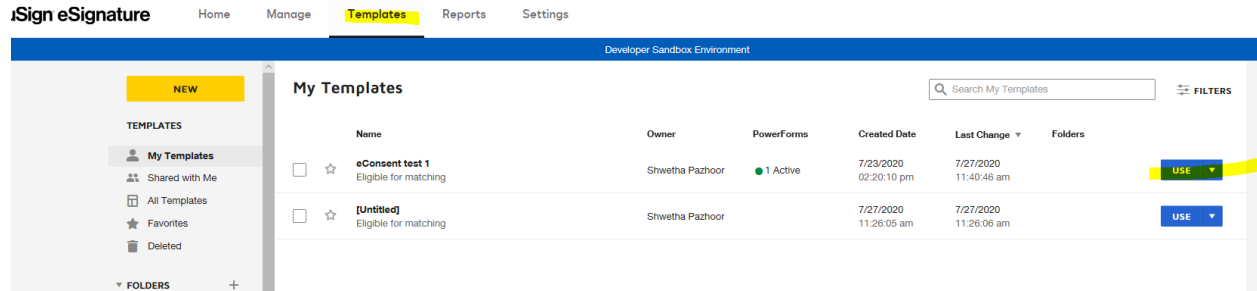
Save and Close



# Instructions for using DocuSign for eConsents(Part 11):

## How to email eConsent to patient using DocuSign:

Go back to templates and click on “USE”



Fill out all information and send:

# Instructions for using DocuSign for eConsents(Part 11):

eConsent test 1 ✕

## Recipients

1 **Subject** ✍ NEEDS TO SIGN MORE ▾

**Name \***

  
**Email \***  

2 **Person Obtaining Consent** ✍ NEEDS TO SIGN MORE ▾

**Name \***

  
**Email \***  

### Message to All Recipients

Custom email and language for each recipient

To: Subject

**Email Language \***

**Email Subject \***

Character remaining: 90

**SEND** **ADVANCED EDIT** **DISCARD**

### Advanced Options | [Edit](#)

- Recipients can sign on paper
- Recipients can change signing responsibility
- Incomplete envelopes expire 120 days after send date
- Recipients are warned 0 day(s) before request expires
- Comments are enabled
- Senders can use either quick send or advanced edit

# Instructions for using DocuSign for eConsents(Part 11):

Patient will get email with link-once patient clicks link they will be able to see the consent-they will click on start

The screenshot shows a DocuSign envelope interface. On the left, there is a yellow button labeled 'START'. The main content area contains the following text:

DocuSign Envelope ID: 7BEAF2A1-A6A5-4380-B507-2200B116377C

**UTHealth**  
The University of Texas  
Health Science Center at Houston

DEMONSTRATION DOCUMENT ONLY  
PROVIDED BY DOCUSIGN ONLINE SIGNING SERVICE  
999 3rd Ave, Suite 1700 • Seattle • Washington 98104 • (206) 219-0200  
www.docusign.com

**CONSENT TO TAKE PART IN RESEARCH**

*Consent Template Version: January 2019.*  
*This is a template – please replace all the text in blue with study specific information.*

**Simple Study Title:** <use [www.clinicaltrials.gov](http://www.clinicaltrials.gov) title, if the study not registered use iRIS study alias>

**Full Study Title:** <use the full protocol title>

**Study Sponsor:** <if the study is not sponsored, delete this line>

**Principal Investigator:** <PI name, credentials; e.g. John Smith, MD, Professor, Internal Medicine, UTHealth>

**Study Contact:** <include the name and phone number; e.g., Jane Doe, RN, Research Nurse,

Click on Sign

Reason for signature will pop up-patient has to chose the reason

Then patient has to log in again to sign


Click on FINISH

The screenshot shows a DocuSign document titled 'Informed Consent <Short Title>'. At the top, there is a blue bar with the text 'Done! Select Finish to send the completed document.' and a yellow button labeled 'FINISH'. Below the bar, there is a search bar and a toolbar with icons for search, download, print, and share. The main content area contains the following text:

Page 8

**SIGNATURES**

Sign below only if you understand the information given to you about the research and you choose to take part in this research study. Make sure that all your questions have been answered. If you decide to take part in this research study, a copy of this signed consent form will be given to you.

Shwetha Pazhoor		7/27/2020	
Printed Name of Subject	Signature of Subject	Date	Time
Printed Name of Legally Authorized Representative	Signature of Legally Authorized Representative	Date	Time

Coordinator will get an email notification to review document

Click on the link

Click on NEXT and SIGN

Click on FINISH

If coordinator has not signed the main page will show action required





# Instructions for using DocuSign for eConsents(Part 11):

Sign or Get Signatures

NEW

## OVERVIEW

Last 6 Months

-  **Action Required** 1 >
-  **Waiting for Others** -- >
-  **Expiring Soon** -- >
-  **Completed** 1 >

## DEVELOPER SANDBOX

This is your sandbox (demo) environment, which enables you to configure your apps for API integration, including integrator keys and associated parameters.

This sandbox is a full-featured development environment, however all the documents sent for eSignature through this account are flagged with a red demo watermark and are thereby not legally-binding.

## GETTING STARTED

All guidance about using your sandbox demo account, coding your integrations, and migrating to a production account can be found in the [Developer Center](#). If you are just starting out, checkout our [Getting Started Guide](#)

## MY DOCUSIGN ID

[Edit](#)



**Shwetha Pazhoor**  
shwetha.pazhoor@uth.tmc.edu  
Member since 2020

  
[Create Your Signature](#)

Coordinator will get email with completed ICF

---

# Instructions for using DocuSign for eConsents(Part 11):

## How to Text patient with url:

Select template and select Create Power Form from drop down

The screenshot shows the 'My Templates' page in DocuSign. A table lists templates with columns for Name, Owner, PowerForms, Created Date, Last Change, and Folders. The 'eConsent test 1' template is selected, and a context menu is open over it, showing options like Edit, Move, Share to Folders, Create a Copy, Edit PowerForm, **Create PowerForm**, Include in Matching, Exclude from Matching, Delete, Download, Share with Users, and Transfer Ownership.

Name	Owner	PowerForms	Created Date	Last Change	Folders
<input type="checkbox"/> ☆ eConsent test 1 Eligible for matching	Shwetha Pazhoor	1 Active	7/23/2020 02:20:10 pm	7/27/2020 11:40:46 am	
<input type="checkbox"/> ☆ [Untitled] Eligible for matching	Shwetha Pazhoor		7/27/2020 11:26:05 am	7/27/2020 11:26:06 am	

Click on Create

## Create PowerForm

A PowerForm is an envelope initiated from a URL that you make available for signers to complete.

**Name \***

eConsent test 1

**Email Subject \***

Please DocuSign: ICF

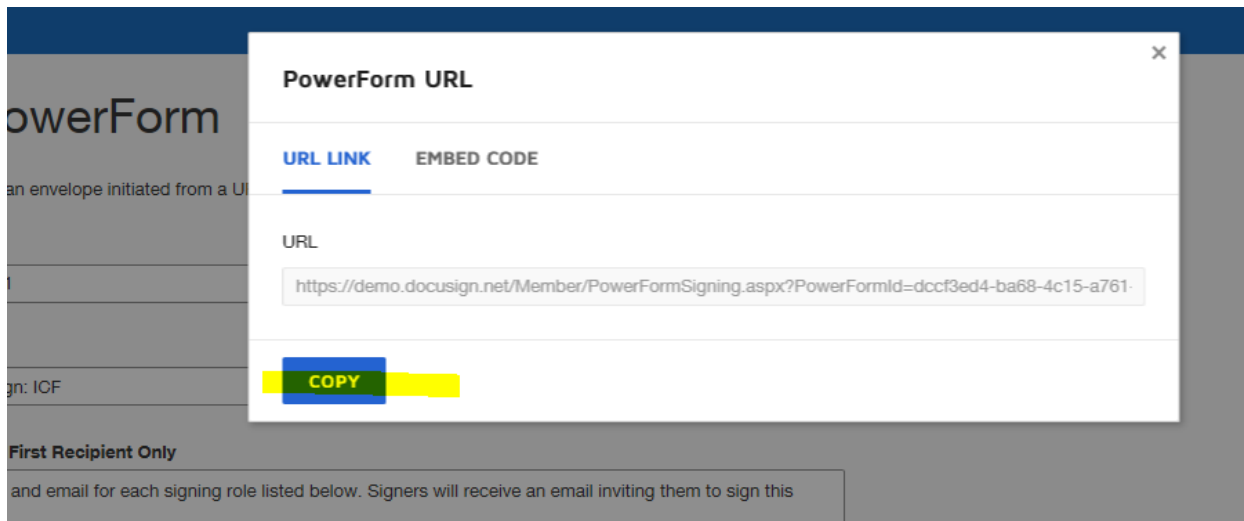
**Instructions for First Recipient Only**

Fill in the name and email for each signing role listed below. Signers will receive an email inviting them to sign this document.

**CREATE**

# Instructions for using DocuSign for eConsents(Part 11):

Click on Copy (this will copy the url link)

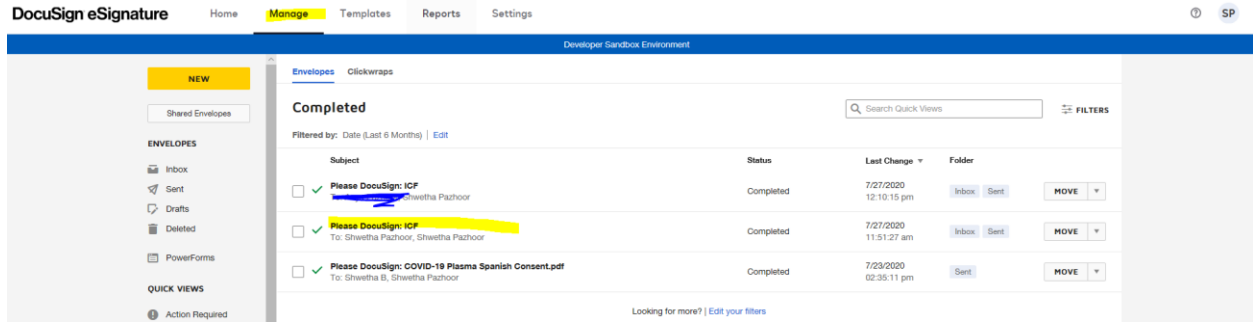


Email the url to yourself and open the email on your phone-copy the url and text it to patient

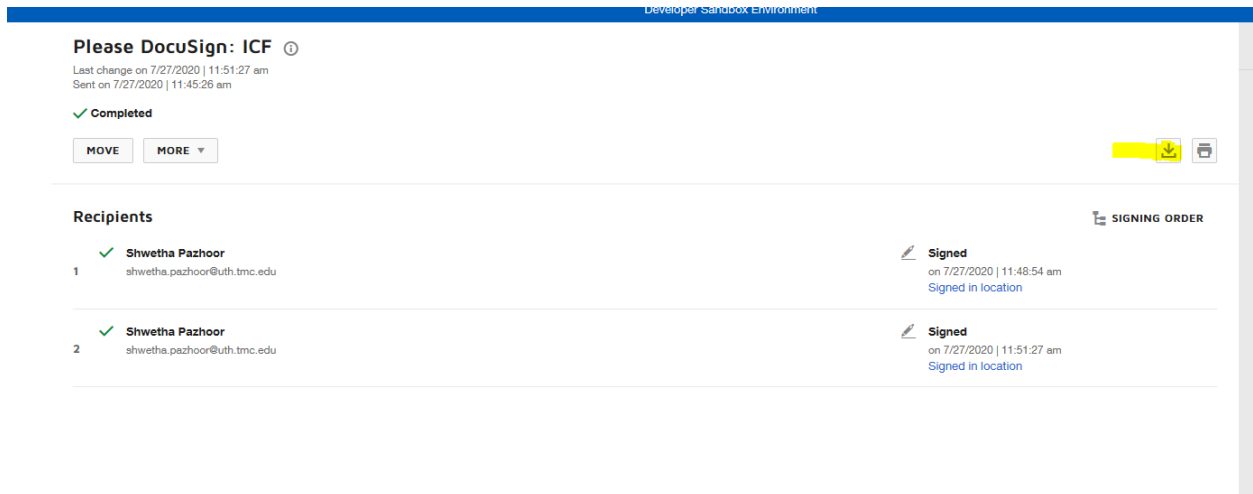
# Instructions for using DocuSign for eConsents(Part 11):

## How to Download the ICF:

You can go to Manage and click on the required ICF



Click on download icon





# Instructions for using DocuSign for eConsents(Part 11):

Reports Settings

**DOWNLOAD** ✕

Select which files you want to download:

- All 2 files
- Document 1 PDF
- Certificate of Completion 1 PDF

---

Combine all PDFs into one file

**DOWNLOAD** CANCEL

ed  
27/2020 | 11:48:54 am  
ed in location

**Signed**  
on 7/27/2020 | 11:51:27 am