

## Adobe Sign Guidance for Human Research Regulatory Documentation

This guidance can be used to sign human research regulatory documents such as the delegation log, training log, and note-to-files, using electronic signatures. This can facilitate signing and updating signatures in these types of regulatory documents when the study staff is working remotely.

Please note that there is an annual transactions limit of 500.

Please look over the tutorial videos for visual and verbal guidance:

- Guided tour of preparing and sending a document for signature:  
<https://www.adobesigndemo.com/en/demo/send>
- Manage and track agreements sent for signature tutorial video:  
<https://helpx.adobe.com/sign/how-to/manage-and-track-documents.html?playlist=/ccx/v1/collection/product/sign/segment/designer/explevel/beginner/applaunch/orientation/collection.ccx.js&ref=helpx.adobe.com>

## Getting access to Adobe Sign

1. If you do not have Adobe Sign, click “Request License” in the link below:  
<https://www.bu.edu/tech/services/cccs/desktop/distribution/adobe-sign/>

### Adobe Sign

The screenshot displays the Adobe Sign website interface. On the left, there is a 'Request Adobe Sign' button and a 'See Also' section with links to the IT Help Center, Other (Non-IS&T) Technical Support Resources, and Purchasing. The main content area includes a description of Adobe Sign's capabilities, a 'Benefits' section, and a 'Key Features' list. On the right, a 'Quick Start' sidebar provides information about availability for faculty and staff, cost details, and a prominent 'Request License' button.

**Request Adobe Sign**

Adobe Sign provides secure, comprehensive e-signature collection and automation from anywhere, including Adobe Acrobat and Microsoft Office.

**See Also**

- > [IT Help Center](#)
- > [Other \(Non-IS&T\) Technical Support Resources](#)
- > [Purchasing](#)

**Benefits**

Adobe Sign makes it easy for individuals or departments to build, send, and track forms for digital signatures. Efficiently and securely send documents for signature without requiring recipients to print and scan. And because Adobe Sign is integrated with your existing BU login, you won't need to create and track external accounts.

**Key Features**

- > Invite signers to complete documents via through email, even if they don't have an Adobe ID
- > Request signatures from multiple recipients, in any order, a specific order, or a combination of both
- > Designate recipients as signers or approvers
- > Create and share document templates with your team
- > Record a transaction audit trail for each document

**Quick Start**

**Available to:** Faculty, Staff

**Cost:** No charge for typical use. Charges may apply for extensive use. See [Cost](#), below.

> See [Getting Started](#), below.

**Request License**

**Login**

## Accessing Adobe Sign

(There are two methods but the instructions below for utilizing either method to access Adobe Sign are pretty much identical.)

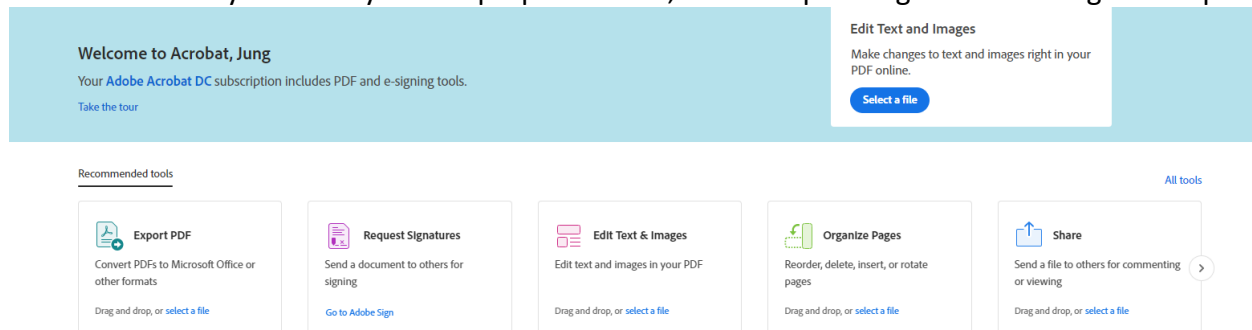
1. Login to your Adobe account and access it via a web browser:  
<https://www.bu.edu/tech/services/cccs/desktop/distribution/adobe-sign/>
  - a. Click “Login” (see green login button in the Quick Start box above)


OR

- Download Acrobat Pro DC or Creative Cloud to install Acrobat on your device and access Adobe Sign via your desktop application: click on the link above and look under “Requirements.” Note that these may have fees and you should check with BU IT.

## Using Adobe Sign via web browser (#1 above):

- Login into your Adobe account.
- Click “Edit Text & Images” and upload the PDF file of the document that needs to get signed. If it’s a MS Word document, convert it to a PDF file.
  - If you already have a prepared form, click “Request Signatures” and go to Step 6.

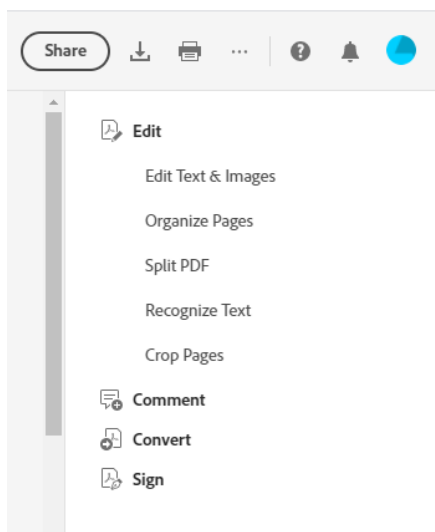


- Click the “Add text”  fill out the fields in the PDF as necessary (except for the signature/initials fields).
- Click “Close” on the right-hand corner of the screen once you are done editing the file.

The screenshot shows the Adobe Acrobat DC web interface with a PDF document titled "Study Name: Clinical Trial" and "Study IRB #: H-9999". The document contains a "Signature/Task Delegation Log" table. The table has columns for "Print Name", "Degree(s)", "Role on study", "Signature", "Initials", "Delegated study tasks (see below)", "Start date", "End date", and "PI Initials/date". The table is partially filled with data for Jane Smith and John Roberts. The interface also shows a "Study PI:" field and a "Close" button in the top right corner.

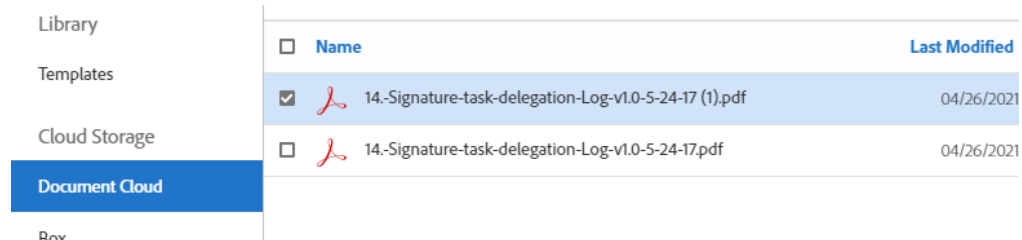
Print Name	Degree(s)	Role on study	Signature	Initials	Delegated study tasks (see below)	Start date	End date	PI Initials/date
Jane Smith	MD	Co-Investigator			a, b, c, d, e	4/26/2021		
John Roberts	BS	Study Staff			g, i, m, n, p, q, r	4/26/2021		

- Click on “...” in the RH corner and click “Sign” and then click “Request Signatures.” This will lead you to Adobe Sign.



6. Enter the recipients' emails, edit the message accordingly, and add/drag the file that needs to get signed.

- a. If you are trying to attach the file you just edited, click attach file and select "Document Cloud" in the left menu.



- b. The document can be completed/signed in specific order or let the recipients access the document in any order (see toggle under Recipients).
    - i. If it's a delegation log, it is recommended that you specify an order so that the Principal Investigator can sign off on each staff, after that specific staff has entered their signature.
7. Make sure to check the "Preview & Add Signature Fields" box at the bottom and click "Next."

## Recipients

Complete in Order ☐ Complete in Any Order

[Add Me](#) | [Add Recipient Group](#) | ?

1	 <input type="text" value="mtroth@bu.edu"/>	 Email	
2	 <input type="text" value="...@gmail.com"/>	 Email	
3	 Enter recipient email		



[Show CC](#)

## Message

Delegation log
Please review and complete Delegation log.

## Files

[Add Files](#)

 14.-Signature-task-delegation-Log-v1.0-5-24-17.pdf	
Drag More Files Here	

## Options

- ☐ Password Protect
- ☐ Set Reminder

Recipients' Language

English: US

☒ Preview & Add Signature Fields

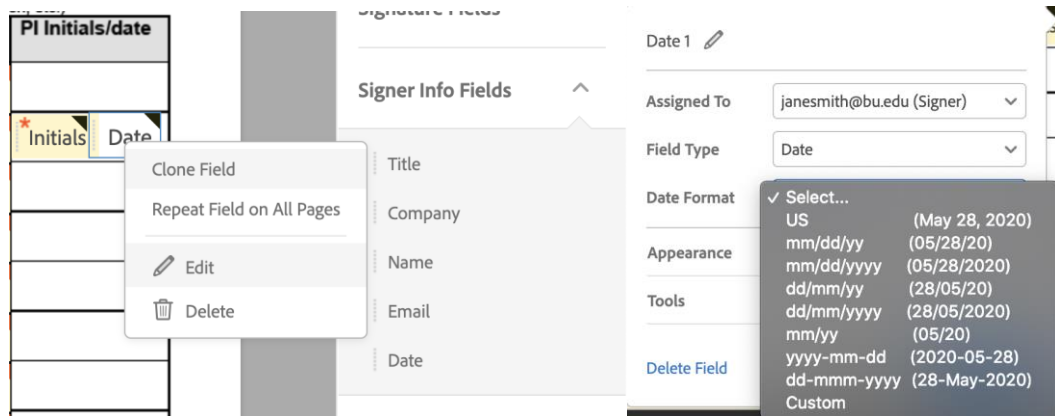
Next

- On the right-hand side, under “recipients” note the “signer” you are now going to create the signature field for. Click on this drop-down to change the “signer” as necessary.
- Click “Signature fields” to reveal the field options. Select and drag the appropriate fields (signature and/or initials) on to the document where you want to place it. Adjust the size as necessary.

### Signature Fields

- Signature
- Initials
- Signature Block
- Stamp

10. In this example, the field asks for initials and date. Click on “signer info field” and select and drag the date field. You can modify the format of the date field by right-clicking on to the field and click “edit” and select the desired format.



11. When all the necessary fields have been added, click “send.”
12. To manage and track sent documents, there are two options:
- When you send out the document for signatures, you as the requestor, will get an email confirmation that the document has been sent. On that email, there will be a direct link to track the progress/status of the document.



You can always [Login to Adobe Sign](#) to:

- Check the status of this document
- Set up a reminder informing another party that you are waiting for their signature
- Share your agreements with a colleague

- Login into Adobe Sign and click on “Manage”:

[https://bostonu.na2.documents.adobe.com/account/homeJS?dc\\_remove=true](https://bostonu.na2.documents.adobe.com/account/homeJS?dc_remove=true)

## Using Adobe Sign via desktop application

- Open the PDF file of the document that needs to get signed. If it's a MS Word Document, convert it to a PDF file.
  - If you already have a prepared form, go to Step 4.
- Click the “Edit PDF” tool  to fill out the fields in the PDF as necessary (except for the signature/initial fields).
- Click “Close” on the right-hand corner of the screen once you are done editing the file.
- If the “Request Signatures” tool is not available on the right-hand side list of tools, click on “More Tools”  to add this tool.
- Click on “Request Signatures.”
- A window will pop-up and on the button, click on “More Options.”

POWERED BY  
**Adobe Sign**

### Get documents signed fast with Adobe Sign

Add signers, specify where to sign, send and track progress. [Learn more](#)

Add signers Add CC

Q Add name, email id, etc.

14.-Signature-task-delegation-Log-v1.0-5-24-17

Please review and sign this document.

File(s) Add Files

14.-Signature-task-delegation-Log-v1.0-5-24-17.pdf

**More Options** **Cancel** **Specify Where to Sign**

7. Enter the recipient's email, edit the message accordingly, and make sure that the "Preview & Add Signature Fields" box at the bottom and click "Next."
  - a. The document can be completed/signed in specific order or let the recipients access the document in any order (see toggle under Recipients).
    - i. If it's a delegation log, it is recommended that you specify an order so that the Principal Investigator can sign off on each staff, after that specific staff has entered their signature.

**Recipients**

Complete in Order ☐ Complete in Any Order Add Me | Add Recipient Group | ?

1	mtroth@bu.edu	Email	
2	[redacted]@il.com	Email	
3	Enter recipient email		

[Show CC](#)

**Message**

Delegation log

Please review and complete Delegation log.

**Files** Add Files

14.-Signature-task-delegation-Log-v1.0-5-24-17.pdf

Drag More Files Here

**Options** ?

☐ Password Protect

☐ Set Reminder

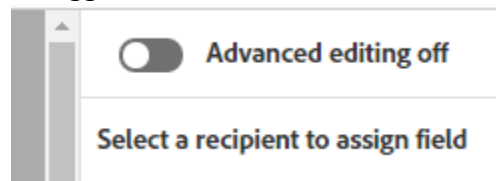
Recipients' Language

English: US

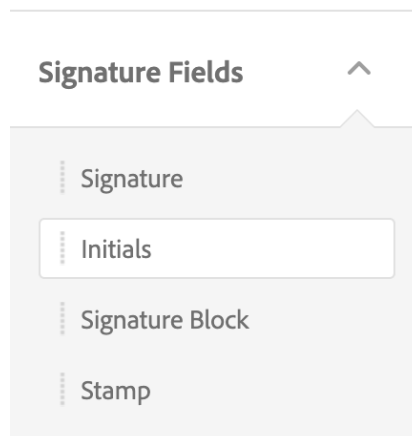
☒ Preview & Add Signature Fields

**Next**

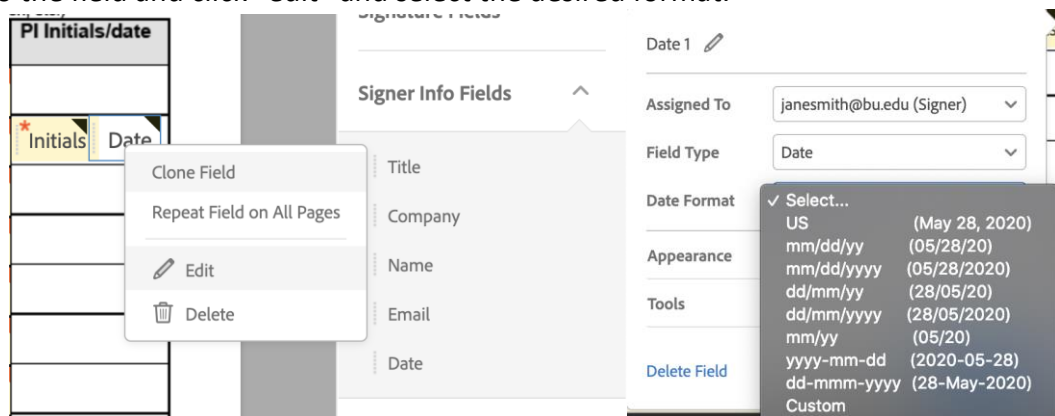
8. On the right-hand side, toggle the field so that “Advanced editing” is on.



9. On the right-hand side, under “recipients” note the “signer” you are now going to create the signature field for. Click on this drop-down to change the “signer” as necessary.
10. Click “Signature fields” to reveal the field options. Select and drag the appropriate fields (signature and/or initials) on to the document where you want to place it. Adjust the size as necessary.



11. In this example, the field asks for initials and date. Click on “signer info field” and select and drag the date field. You can modify the format of the date field by right-clicking on to the field and click “edit” and select the desired format.



12. When all the necessary fields have been added, click “send.”
13. To manage and track sent documents, there are two options:
- When you send out the document for signatures, you as the requestor, will get an email confirmation that the document has been sent. On that email, there will be a direct link to track the progress/status of the document.

You can always [Login to Adobe Sign](#) to:

- Check the status of this document
- Set up a reminder informing another party that you are waiting for their signature
- Share your agreements with a colleague

b. Login into Adobe Sign and click on “Manage”:

[https://bostonu.na2.documents.adobe.com/account/homeJS?dc\\_remove=true](https://bostonu.na2.documents.adobe.com/account/homeJS?dc_remove=true)

## Recipient’s POV when they receive the document

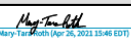
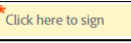
1. Below is an example of what the document will look like to the recipient. The recipient will only be able to sign their designated fields.

Delegation Log

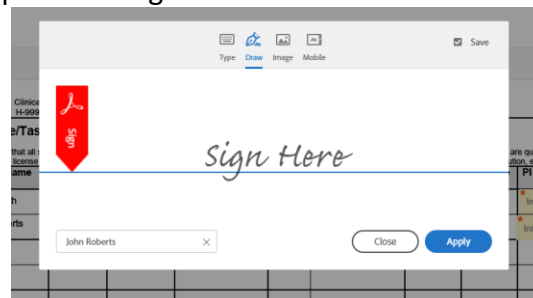
Study Name: Clinical Trial  
Study IRB #: H-9999

**Signature/Task Delegation Log**

Please ensure that all staff listed on this log are IRB-approved to do the task to which they are assigned (i.e. such as consenting participants) and the education, and license to do so (such as administering medications, performing physical exams and assessments, assessing AE seriousness, grade

Print Name	Degree(s) <sup>1</sup>	Role on study	Signature	Initials	Delegated study tasks (see below)	Start date	End
Jane Smith	MD	Co-Investigator	 <small>Jane Smith (JSP-26, 2011, 1346 EDT)</small>		a, b, c, d, e	4/26/2021	
John Roberts	BS	Study Staff			g, i, m, n, p, q, r	4/26/2021	

2. Click on the fields to complete it. Select “Draw” to sign using your mouse, finger, or stylus. Click “Apply” to place the signature onto the document.



3. When all designated fields have been completed, click on the “Click to sign” button to complete the form.

Signature/Task Delegation Log  
Template Version 1.0 5/24/17

Page \_\_\_\_ of \_\_\_\_

By signing, I agree to both this agreement and the [Consumer Disclosure](#). My use of Adobe Sign is governed by the [Adobe Terms of Use](#).

[Click to Sign](#)

4. When all recipients have signed the document, each recipient will receive a copy of the final document.