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/

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

2. 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):

1. Login into your Adobe account.
2. 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.
   a. If you already have a prepared form, click "Request Signatures" and go to Step 6.
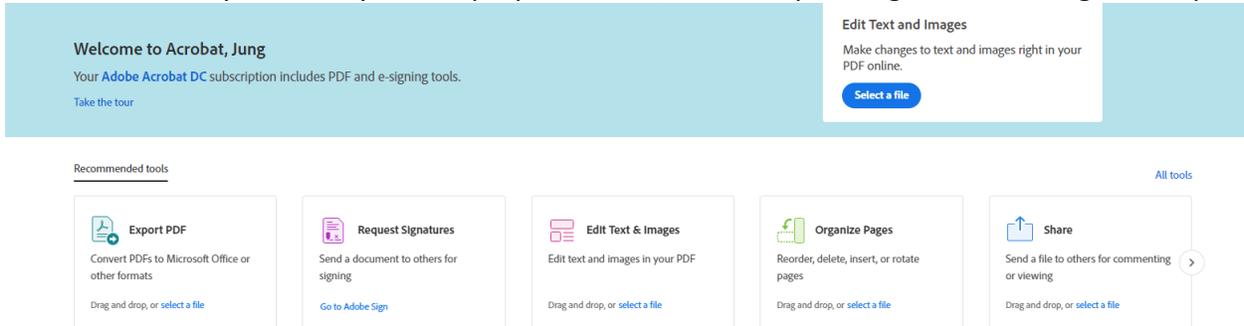

3. Click the "Add text" 🔵 fill out the fields in the PDF as necessary (except for the signature/initials fields).
4. Click "Close" on the right-hand corner of the screen once you are done editing the file.
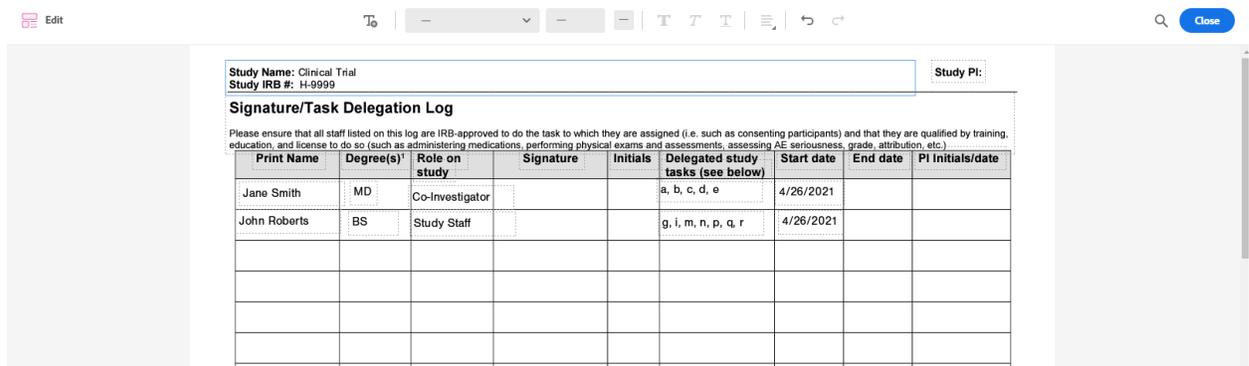
5. Click on "…" in the RH corner and click "Sign" and then click "Request Signatures." This will lead you to Adobe Sign.
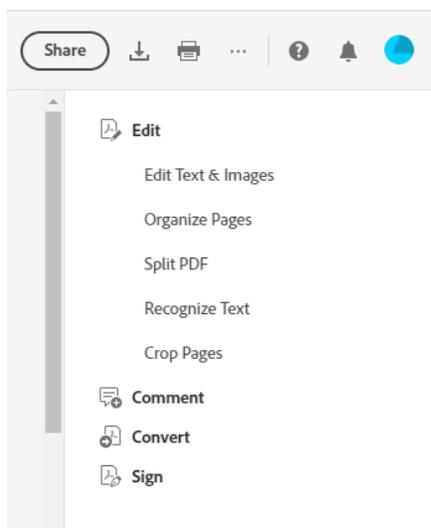
6. Enter the recipients' emails, edit the message accordingly, and add/drag the file that needs to get signed.
   a. If you are trying to attach the file you just edited, click attach file and select "Document Cloud" in the left menu.
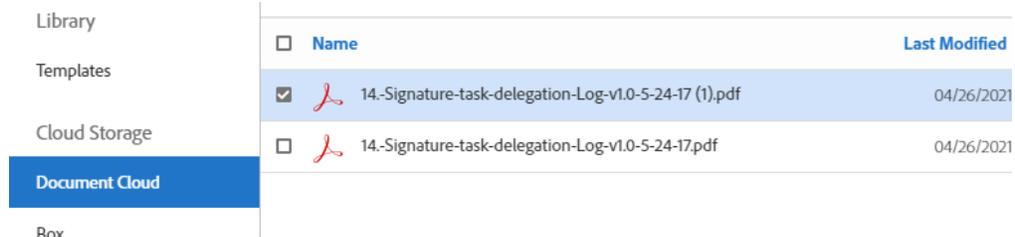
   b. The document can be completed/signed in specific order or let the recipients access the document in any order (see toggle under Recipients).
      i. If it's a delegation log, it is recommended that you specify an order so that the Principal Investigator can sign off on each staff, after that specific 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	✒️ v	mtroth@bu.edu	✉️ v Email	✕
2	✒️ v	▮mail.com	✉️ v Email	✕
3	✒️ v	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, 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.
9. 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:
    a. 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.

    b. Login into Adobe Sign and click on "Manage": https://bostonu.na2.documents.adobe.com/account/homeJS?dc_remove=true

Using Adobe Sign via desktop application

1. 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.
    a. If you already have a prepared form, go to Step 4.
2. Click the "Edit PDF" tool to fill out the fields in the PDF as necessary (except for the signature/initial fields).
3. Click "Close" on the right-hand corner of the screen once you are done editing the file.
4. If the "Request Signatures" tool is not available on the right-hand side list of tools, click on "More Tools" to add this tool.
5. Click on "Request Signatures."
6. A window will pop-up and on the button, click on "More Options."
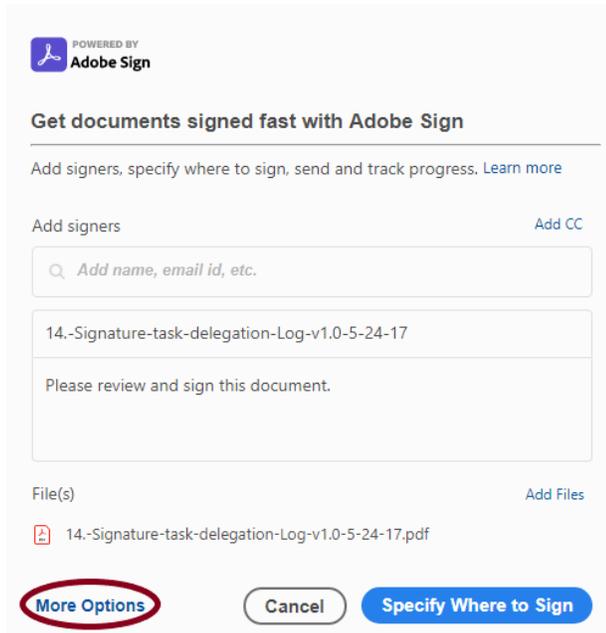
7. Enter the recipient's email, edit the message accordingly, and make sure that the "Preview & Add Signature Fields" box at the bottom and click "Next."
   a. The document can be completed/signed in specific order or let the recipients access the document in any order (see toggle under Recipients).
      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.
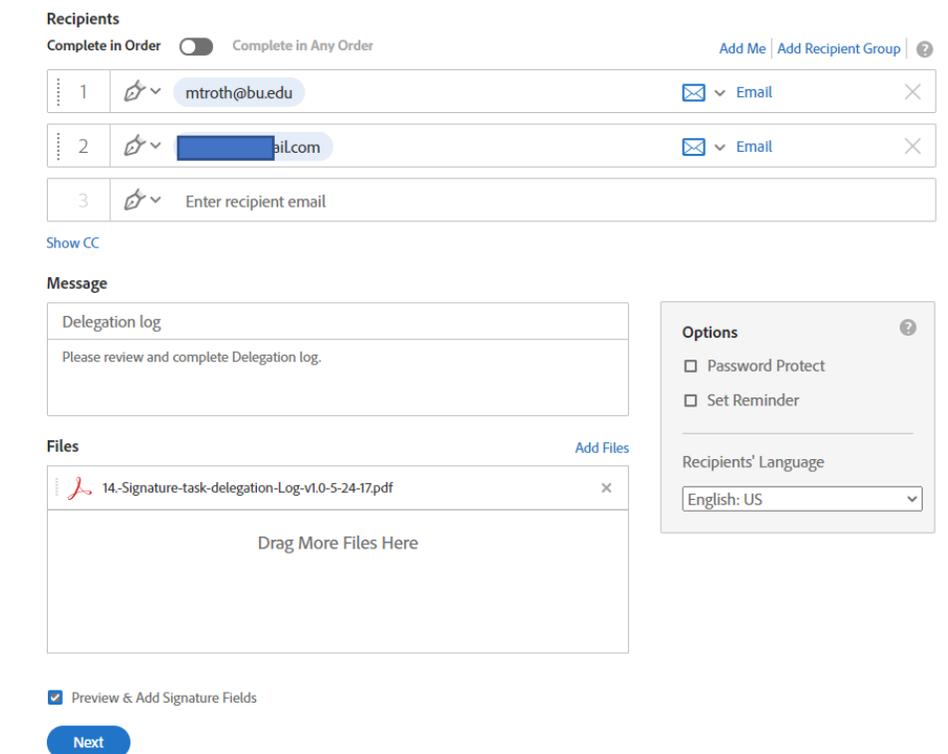
8. On the right-hand side, toggle the field so that "Advanced editing" is on.

Advanced editing off

Select a recipient to assign field
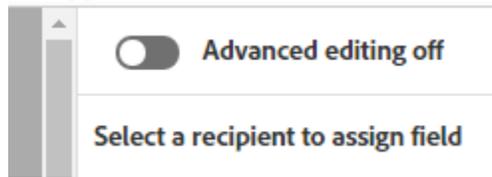
9. On the right-hand side, under "recipients" note the "signer" you are now going to create the signature field for. Click on this drop-down to change the "signer" as necessary.

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.

Signature Fields ∧

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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.
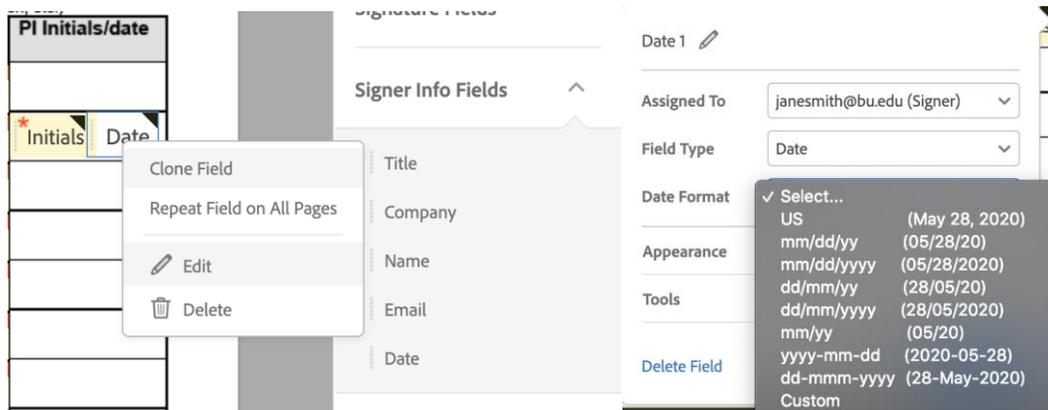
12. When all the necessary fields have been added, click "send.

13. To manage and track sent documents, there are two options:
    a. 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

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 that education, and license to do so (such as administering medications, performing physical exams and assessments, assessing AE seriousness, grade

	Print Name	Degree(s)[1]	Role on study	Signature	Initials	Delegated study tasks (see below)	Start date	End
Start	Jane Smith	MD	Co-Investigator	Mary-Tara Roth (Apr 26, 2021 15:46 EDT)		a, b, c, d, e	4/26/2021	
	John Roberts	BS	Study Staff	Click here to sign		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.

Type   Draw   Image   Mobile   ☑ Save

Sign Here

John Roberts   ✕   Close   Apply
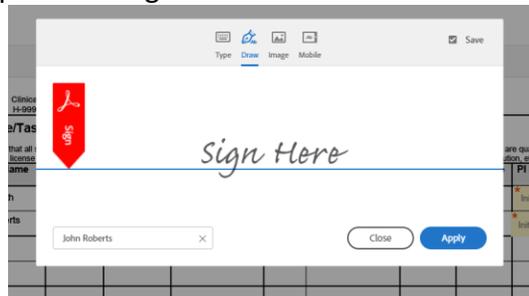
3. When all designated fields have been completed, click on the "Click to sign" button to complete the form.

re/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.