

**University of Wisconsin
NIH Other Support
DocuSign Desk Reference**

For Administrators: How to upload an Other Support document and request a signature

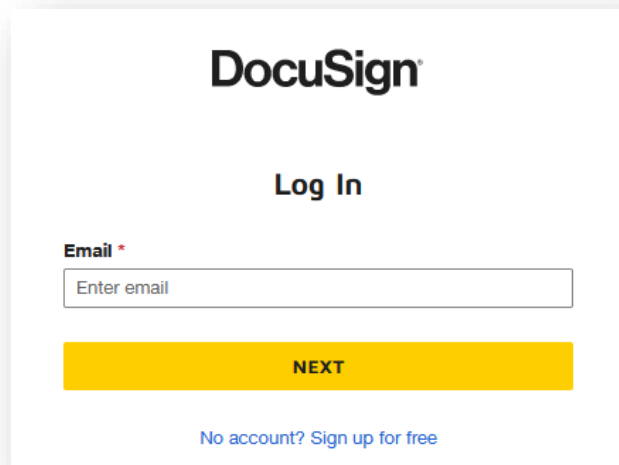
Effective January 25, 2022, the National Institutes of Health (NIH) requires the PI/PD, Co-Investigators, Other Senior/Key Personnel to electronically sign their respective Other Support documents. To comply with this requirement, the University of Wisconsin – Madison is using DocuSign to obtain authenticated electronic signatures on Other Support documents. DocuSign is the preferred and accepted system for electronically signing documents.

This reference describes how an administrator uploads an Other Support document and requests a signature from the researcher. Administrators must remember to **Print to PDF** once the document has been signed to create a flattened, uneditable PDF as required by the NIH.

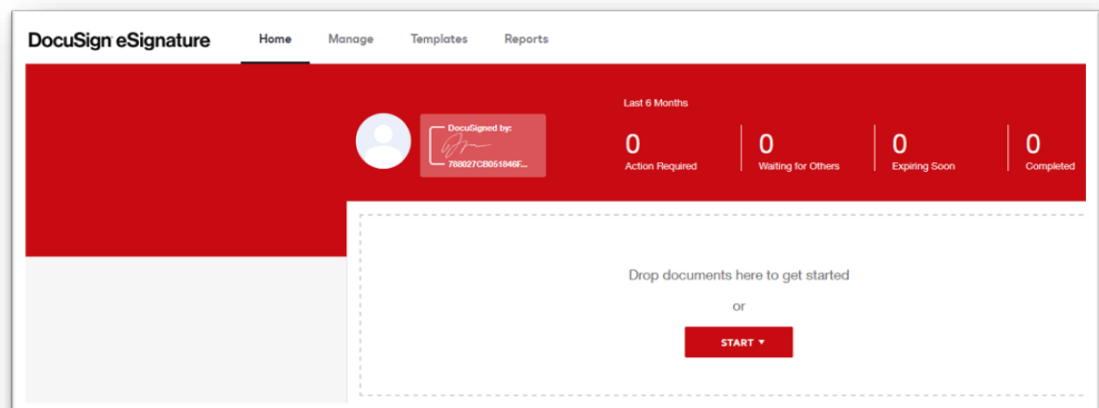
1. Log into DocuSign

Once you have an activated account, you can log into the [DocuSign website](https://app.docusign.com) (app.docusign.com).

Your email address ending in “wisc.edu” will get you to the UW-Madison-licensed version of DocuSign.

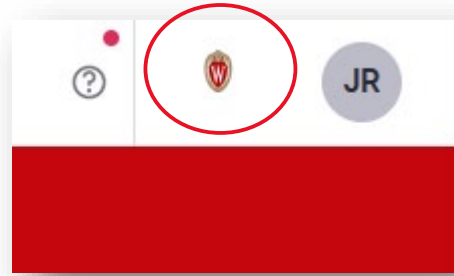
The image shows the DocuSign login interface. At the top is the DocuSign logo. Below it is the text "Log In". There is a label "Email *" followed by a text input field containing the placeholder "Enter email". Below the input field is a large yellow button labeled "NEXT". At the bottom, there is a link that says "No account? Sign up for free".

The landing page of DocuSign looks like this:

The image shows the DocuSign eSignature dashboard. At the top is a navigation bar with "DocuSign eSignature" and links for "Home", "Manage", "Templates", and "Reports". Below the navigation bar is a red header area. On the left of the header is a user profile icon. To its right is a "DocuSigned by:" box showing a signature and the email "780627CB051040E...". Further right, under the heading "Last 6 Months", are four statistics: "0 Action Required", "0 Waiting for Others", "0 Expiring Soon", and "0 Completed". Below the header is a large white area with a dashed border. It contains the text "Drop documents here to get started" and "or" followed by a red button labeled "START".

You will notice the UW crest in the top right corner:

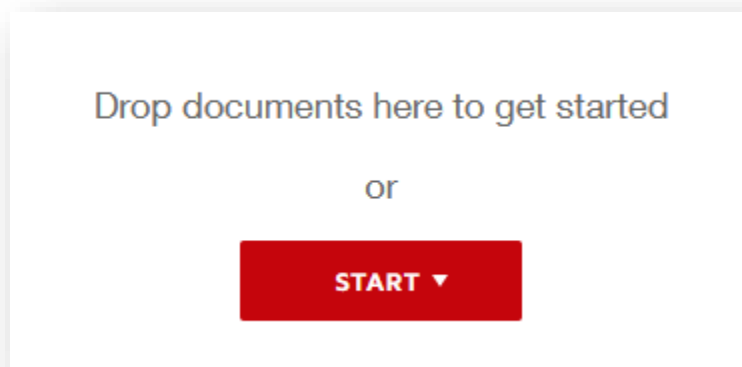
The crest indicates that you are in the version of DocuSign licensed by UW-Madison.



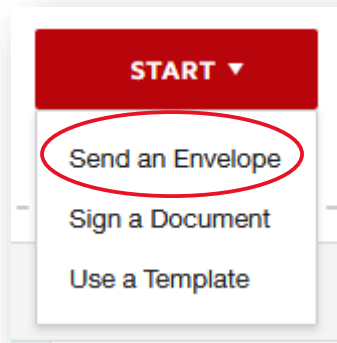
2. Upload a document to sign

After you have prepared the Other Support document with input from the researcher and are assured that the information is true, accurate, and complete, the document can be uploaded in DocuSign (part of the function called "Send an Envelope").

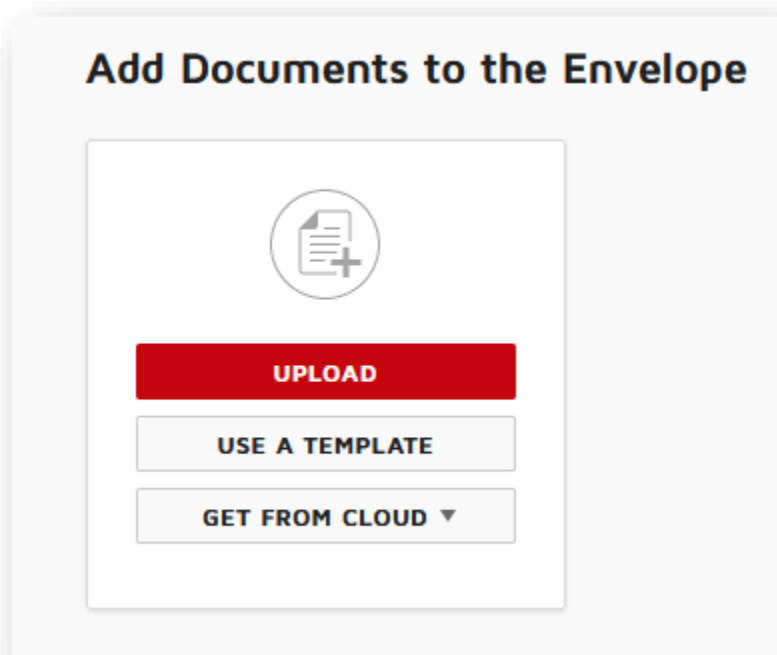
On the DocuSign main page, click on the **START** button.



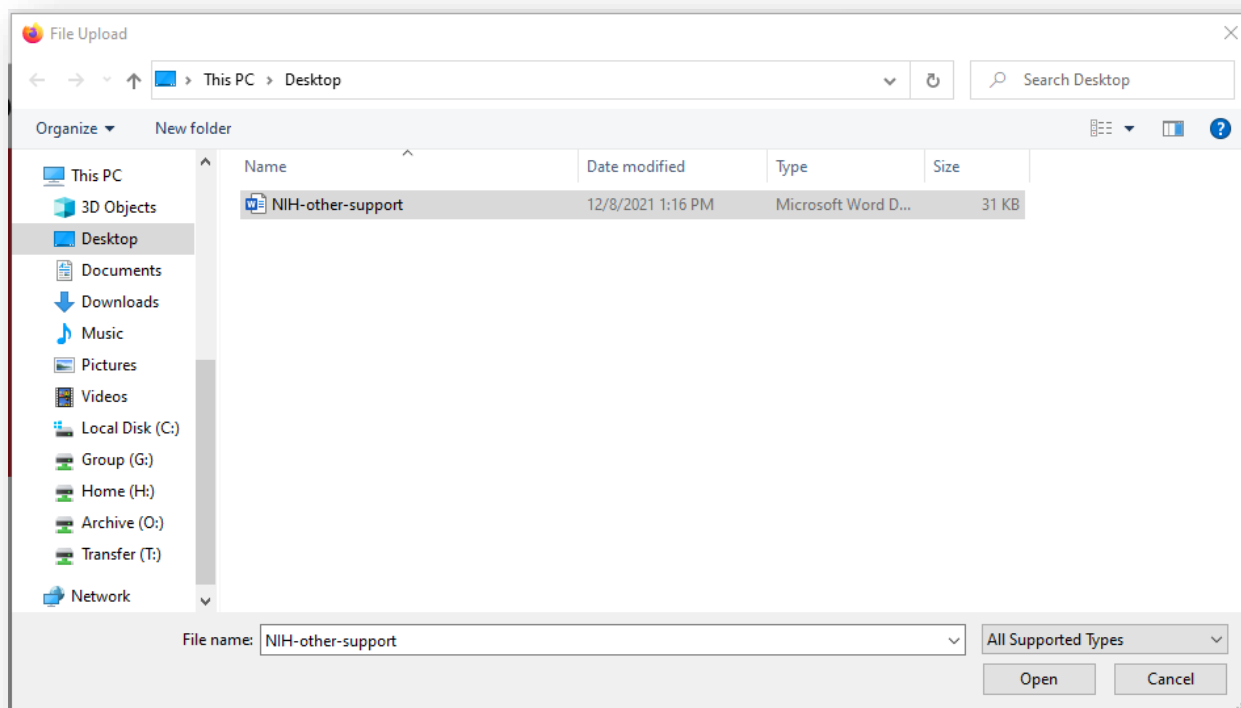
Select "**Send an Envelope**":



A new screen will appear. The next step will be to add a document to the envelope.



Click on **UPLOAD** and select the appropriate document.



The document will then appear on screen.

Add Documents to the Envelope

OMB No. 0501-0001 and 0501-0002 (Rev. 12/2020) Approved Through 12/28/2025

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There is no "form page" for reporting Other Support. Information on Other Support should be provided in the format shown below.

*Name of Individual: Anderson, R.R.
Commons ID: AndersonRR

Other Support – Project/Proposal

ACTIVE

*Title: Chloride and Sodium Transport in Airway Epithelial Cells

Major Goals: The major goals of this project are to define the biochemistry of chloride and sodium transport in airway epithelial cells and clone the gene(s) involved in transport.

*Status of Support: Active

Project Number: 2-R01 HL 05000-13

Name of POF: Anderson, R.R.

*Source of Support: NHLBI


*Primary Place of Performance: University of California, Los Angeles

Project/Proposal Start and End Date: (MM/YYYY) (if available): 03/2021 – 02/2026

* Total Award Amount (including Indirect Costs): \$1,492,232

* Person Months (Calendar/Academic/Summer) per budget period.

Year (YYYY) Person Months (RR.RR)



UPLOAD

USE A TEMPLATE

GET FROM CLOUD ▼

NIH-other-support.docx

3 pages

You may choose to include more than one document at a time in the envelope by clicking on **"UPLOAD"** and repeating the process above.

3. Send the document to the researcher to sign

The next step is to add the individual recipient who must sign the document.

Users will automatically appear as you begin typing in the **"Name"** field. Select the individual who must sign. Note that an individual does not need to have an account if they only need to sign a document. In that case, you will need to enter their full name and email address.

Add Recipients to the Envelope

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

☒ Set signing order

1

Name *


Mark Sweet


Email *

masweet@rsp.wisc.edu

NEEDS TO SIGN ▼

CUSTOMIZE ▼



 **ADD RECIPIENT**

ADD CONDITIONAL RECIPIENT

You must include a Subject for the email that will go to the recipient. You may also choose to include a short message.

Message to All Recipients

Email Subject *

Please DocuSign: NIH-other-support_MSN123456.docx

Characters remaining: 51

Email Message

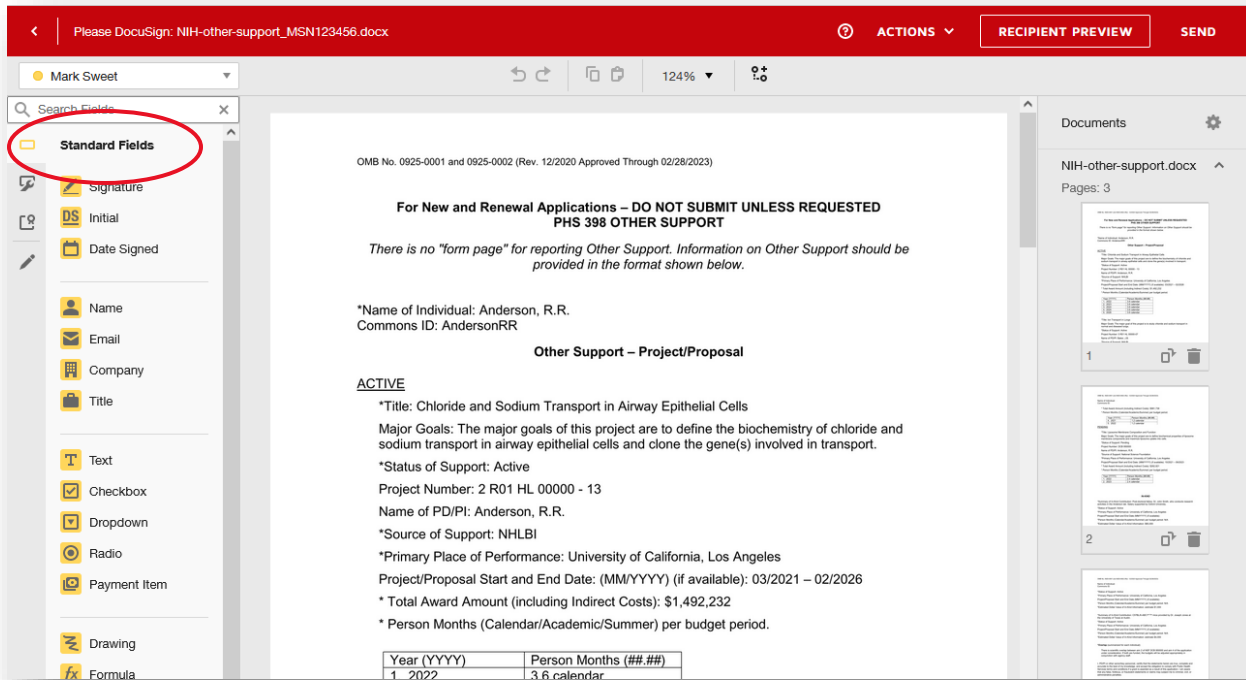
Please review and sign. If there are any issues, please contact me ASAP. Thank you.

Characters remaining: 9914

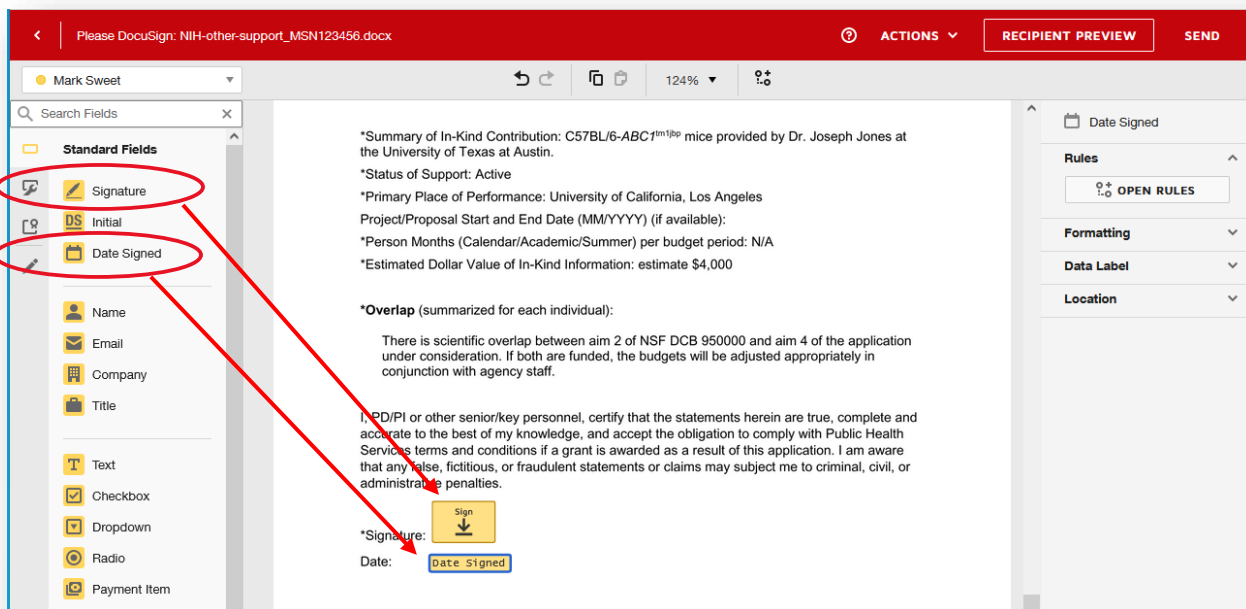
After you have entered a Subject and Message, click on the **"NEXT"** button in the lower or upper right hand corner of the screen. In this next step, you will flag the location for the researcher to sign and indicate where the Date Signed will appear.



A new screen will appear. The left side of the screen contains **"Standard Fields."** The middle section shows the document to be signed. The right side of the screen shows a thumbnail image of the document.



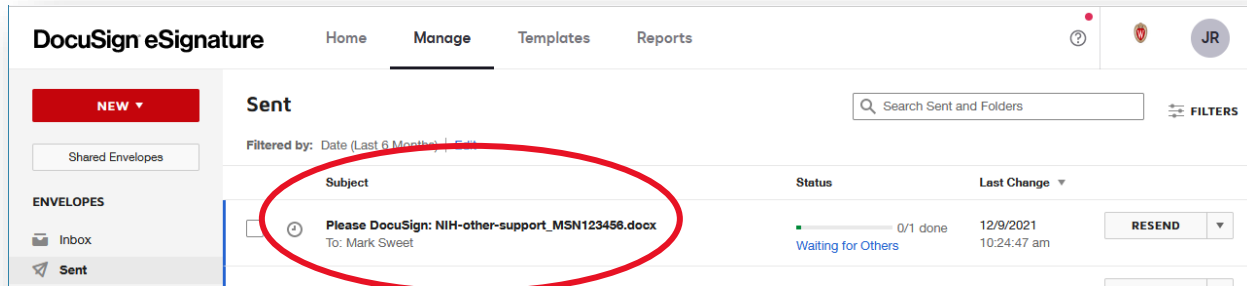
In the middle section, scroll down to the signature block. Click and drag the **"Signature"** and **"Date Signed"** from the list of Standard Fields on the left side of the screen over to the signature block. Once you drag and drop, the field is placed.



After adding the **"Signature"** and **"Date Signed"** fields, you may send the document to the recipient by clicking on **"SEND"** in the bottom right corner of the window.

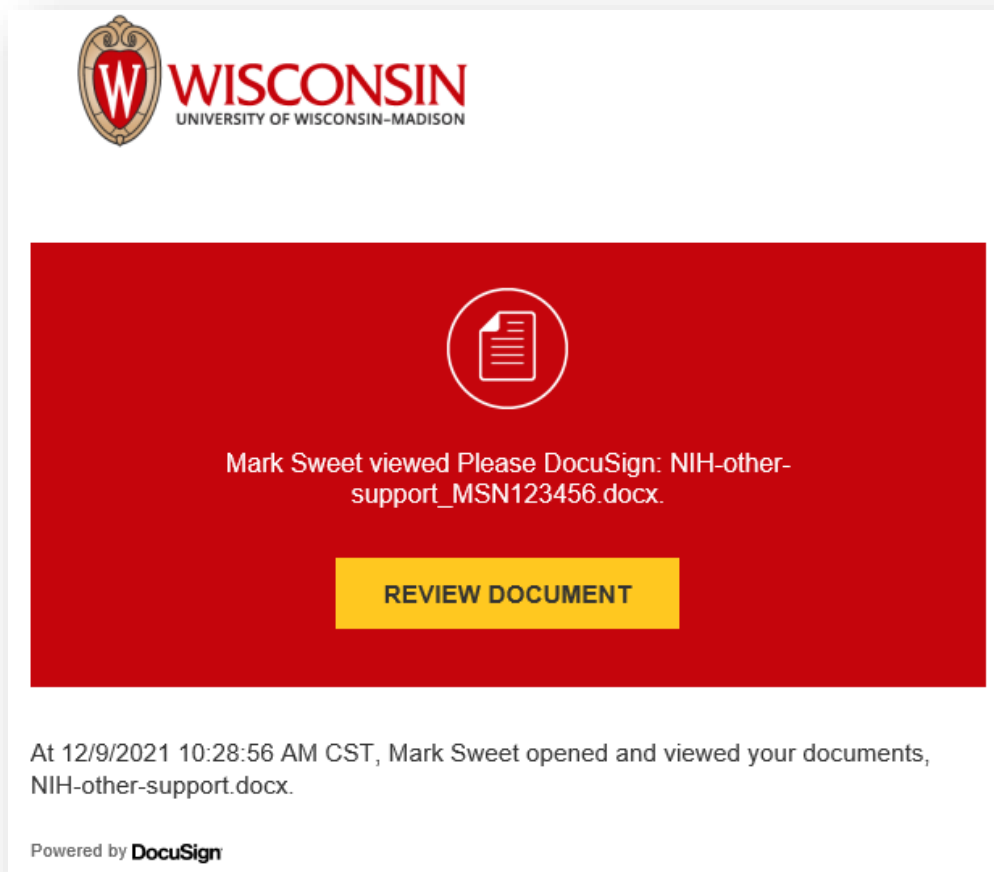


Once you have sent the document, it will appear in your list of **Sent Envelopes**.

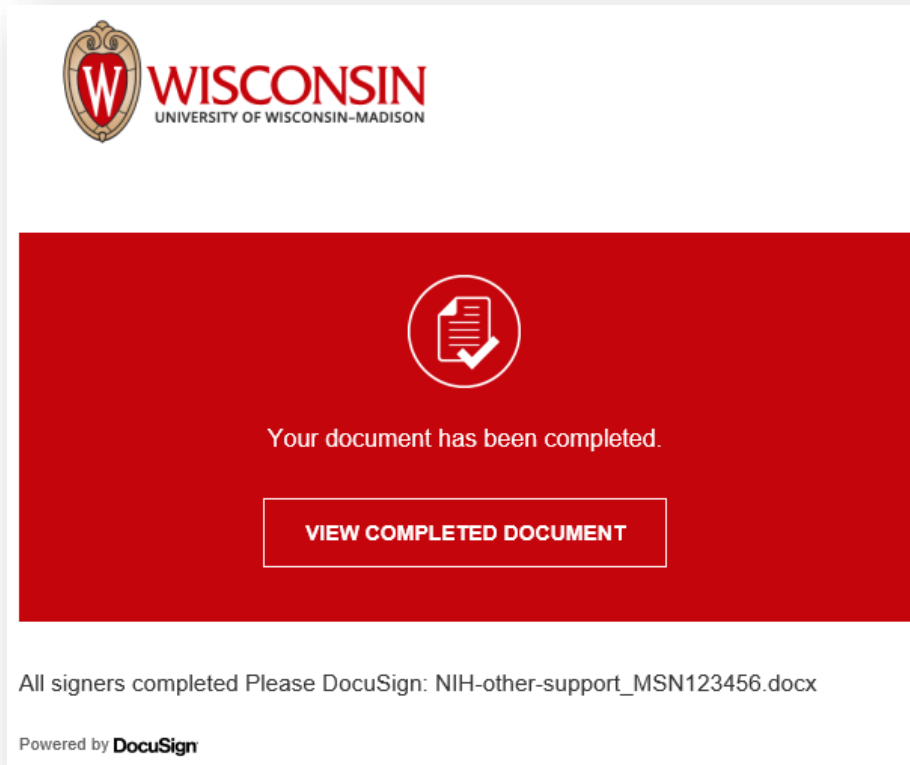


4. Complete and save the Other Support document

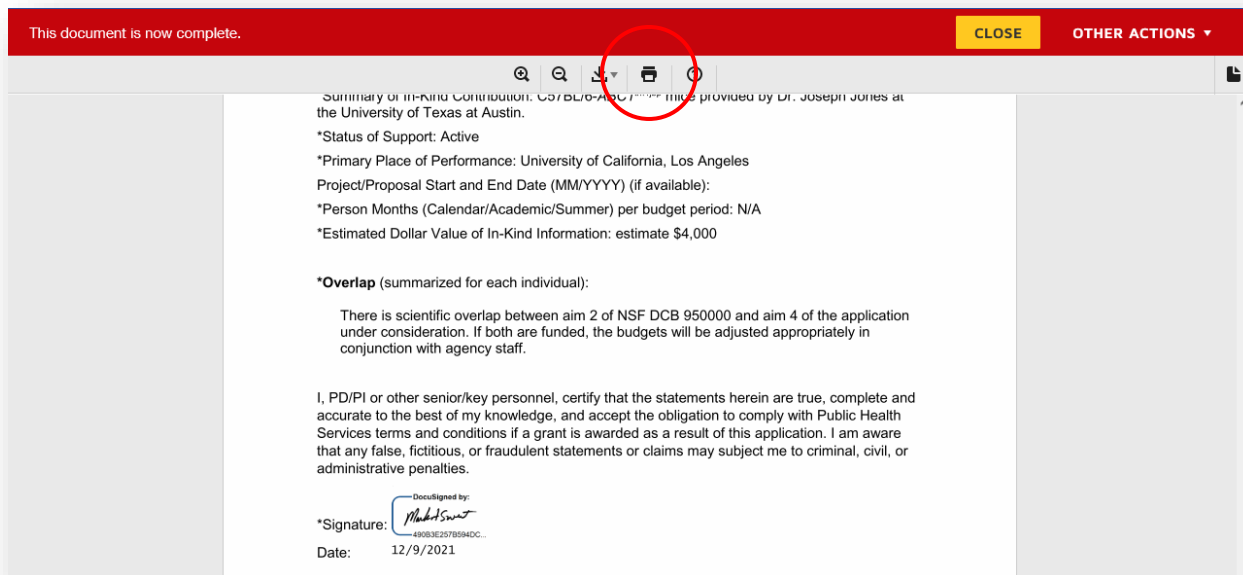
When the individual opens the document, you receive an email with the following message:



After the document has been signed and dated, you receive another email with the following message:



When you click on “**VIEW COMPLETED DOCUMENT**”, your browser will go directly to the signed document. You can scroll down to view the signature. On the top left of the screen, a message indicates that the document is now complete.



Use the printer icon at the top of the screen to print the signed document to PDF. You must print to PDF to prepare the requisite flattened PDF for submission.

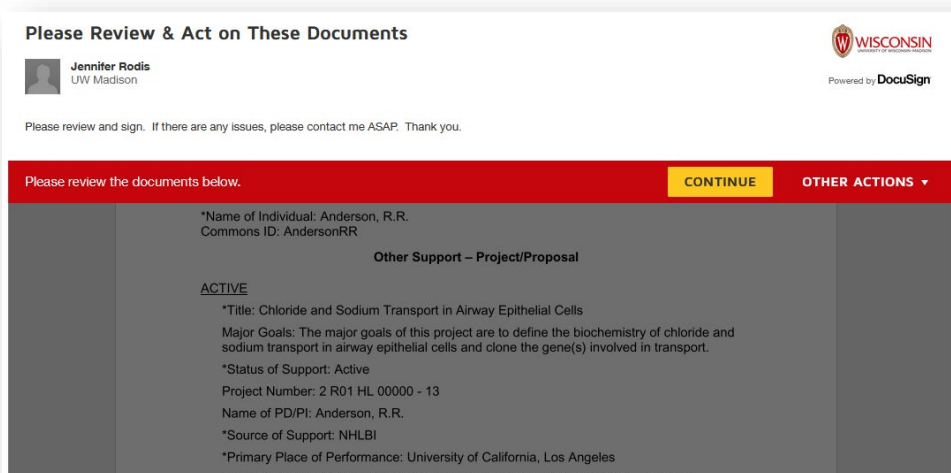
5. What the researcher sees when you request their signature

As an administrator, you may want to know what the researcher sees after you ask for their signature. The following steps occur on the researcher's end.

When you click SEND to ask the researcher for a signature, they receive an email with the following message.



After the researcher clicks on **REVIEW DOCUMENT**, the document opens in a browser. The image on the screen looks like the following.



The researcher clicks **CONTINUE** and the document can be acted upon.

Clicking on the **START** button on the left side of the screen takes the individual to the place in the document where the document is signed.

Please review the documents below.

FINISH **OTHER ACTIONS** ▾

START

OMB No. 0925-0001 and 0925-0002 (Rev. 12/2020 Approved Through 02/28/2023)

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There is no "form page" for reporting Other Support. Information on Other Support should be provided in the format shown below.

After the researcher has signed and clicks **FINISH**, a new pop-up window appears.

Log in to DocuSign

A copy of this document has been saved to your DocuSign account. Please log in to view it.

Email
masweet@rsp.wisc.edu

LOG IN **NO THANKS**

The researcher may **LOG IN** to view a copy of the document. If the researcher selects **NO THANKS**, the following message will appear:

DocuSign

You've finished signing!



You'll receive an email copy once everyone has signed.

At this point, you as the administrator will receive an email that the document has been completed.