

# DocuSign Desk Guide

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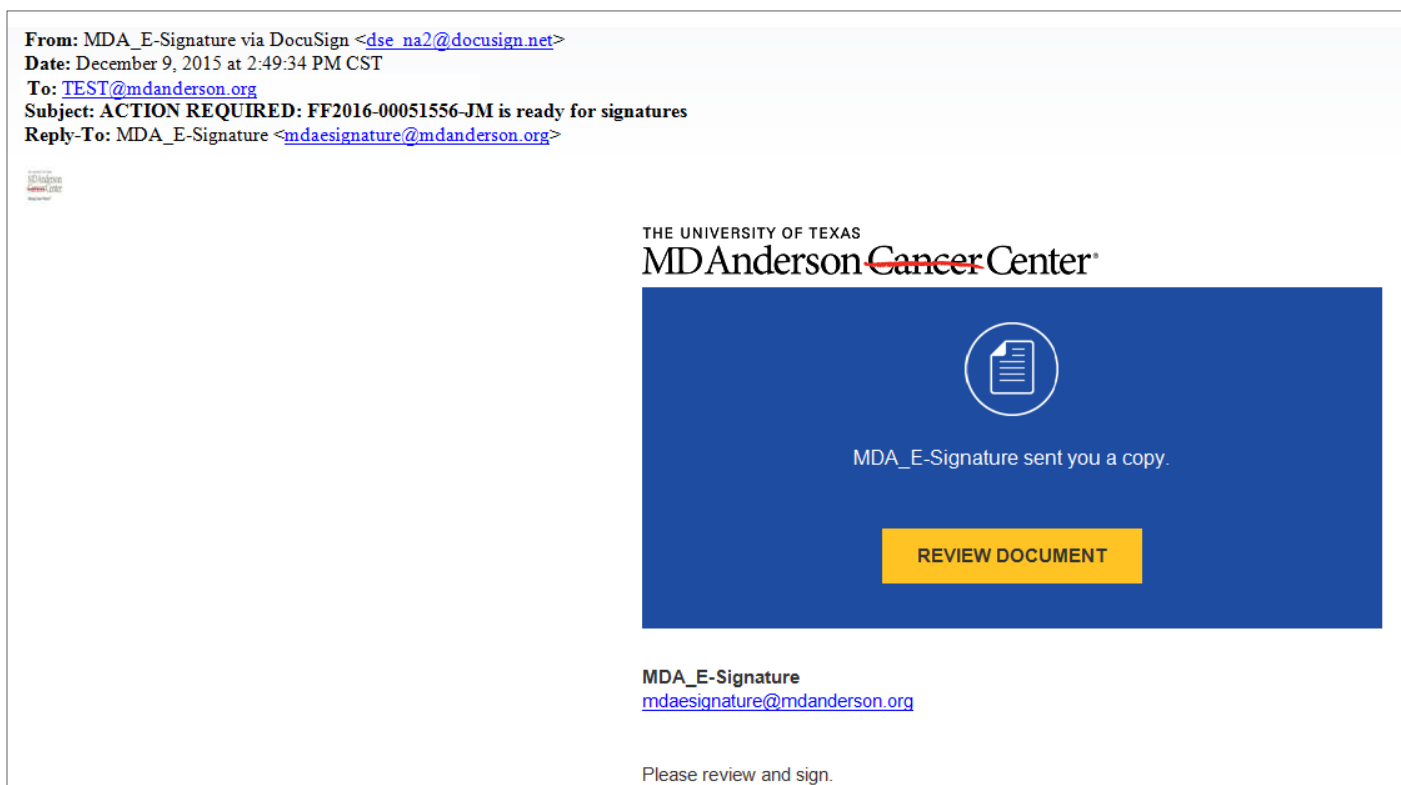
MD Anderson (MDA) has incorporated DocuSign (Digital Transaction Management software designed to safely and securely manage document-based transactions digitally) for all contracts in the Research Contract Tracking System (RCTS).

- Once all reviews and approvals are in place, a notification will be sent to the MDA Principal Investigator to electronically sign the contract.
- Once the MDA PI signs electronically, the Institutional Signing Official (MDA AOR) will be notified to sign.
- After the MDA PI and MDA AOR have signed the document, our contracting party will be notified for signature.

We anticipate electronic signatures will significantly reduce the time to execute research contracts by eliminating the transfer of hard copies and the ability to access the signature activity from any smart phone device.

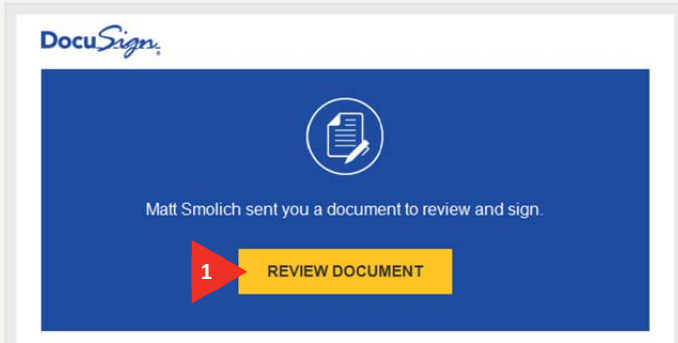
The following pages offer guidance on how to sign electronically.

A sample of the type of email that is sent to facilitate electronic signature of MD Anderson contracts is directly below:



# Sign a Contract Electronically

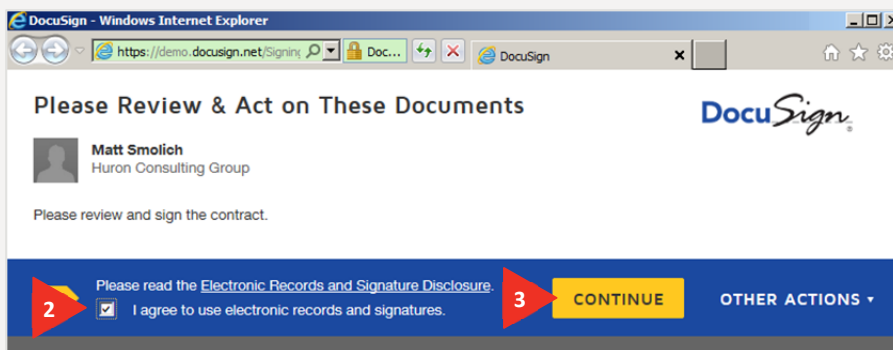
MDA PI, MDA AOR and Contracting Parties required to sign a contract will receive an email from DocuSign. The subject line will contain an internal MDA RCTS record id # & the MDA PI name. Please read the email before hitting the yellow "Review Document" button.



## Sign a Contract Electronically

1. In the email, click **Review Document**.
2. On the DocuSign page, read the Electronic Records and Signature Disclosure and then click the check box to agree to use an electronic signature.

If you don't agree or aren't ready to sign, see the [Other Actions in DocuSign](#) section.

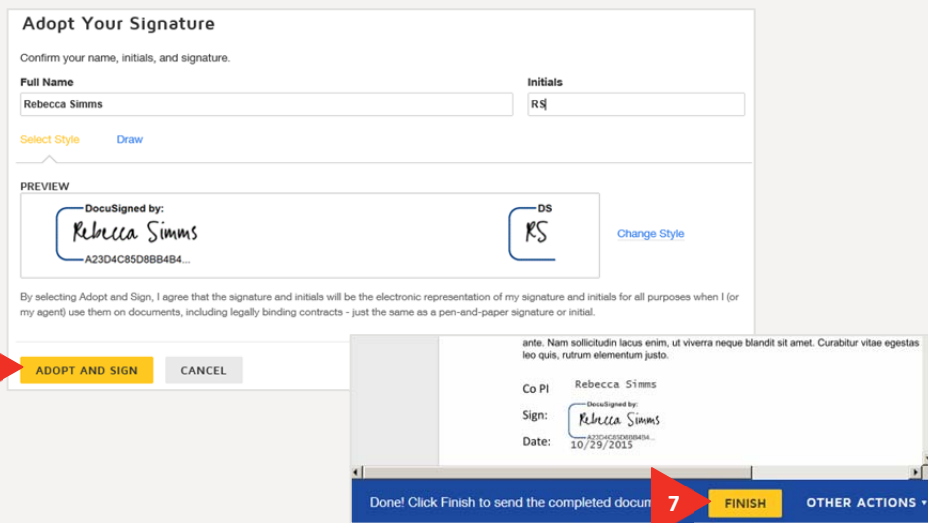
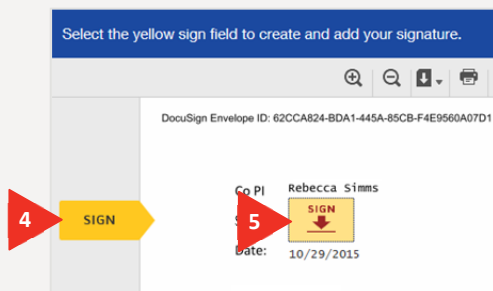


3. Click **Continue**.
4. In the document, click the **Sign** arrow to begin the signing process.
5. In the signature area, click the **Sign** box.
6. Confirm your name, initials, and signature, and then click **Adopt and Sign**.
7. Click **Finish** and then **Continue** in the next window.

You have completed the signing process.

The log in screen appears. Sign in if you want to view the document again.

DocuSign will send the contract for institutional signature only after all the required investigators have signed.



## Other Actions in DocuSign

### Assign Signature to Authorized Signer

If the envelope contains documents more appropriate to be signed by someone else, the signer can click **ASSIGN TO SOMEONE ELSE** from the OTHER ACTIONS menu.

The signer is asked to provide the new signer's email address, the new signer's name and a reason for changing the signer. The reason for changing the signer is sent to the person that sent the document, along with the new signer's name and email.

The signer can click **CANCEL** to return to the document.

Clicking **ASSIGN TO SOMEONE ELSE** will reassign the envelope, the sender and new signer will be notified of the change and signer becomes a CC recipient of the envelope.

The screenshot shows the 'OTHER ACTIONS' menu with four options: 'FINISH LATER', 'PRINT & SIGN', 'ASSIGN TO SOMEONE ELSE', and 'DECLINE TO SIGN'. The 'ASSIGN TO SOMEONE ELSE' option is highlighted with a red box. Below the 'OTHER ACTIONS' header are two buttons: 'CONTINUE' and 'OTHER ACTIONS'. The 'ASSIGN TO SOMEONE ELSE' button is also highlighted with a red box. The description for 'ASSIGN TO SOMEONE ELSE' is: 'Should someone else be signing? Provide the new signer's email address and send the document to them for signature.'

The screenshot shows the 'Assign to Someone Else' dialog box. It has a title bar with a close button (X). The main content area contains three input fields: 'Email Address for the New Signer', 'New Signer's Name', and a text area for 'Please provide a reason to Steve Anderson for changing signing responsibility'. Below the text area is a character count: 'characters remaining 250/250'. At the bottom, there are two buttons: 'ASSIGN TO SOMEONE ELSE' and 'CANCEL'. Red arrows point to the 'Email Address for the New Signer' field, the 'New Signer's Name' field, the text area, and the 'ASSIGN TO SOMEONE ELSE' button.

## Other Actions in DocuSign (cont'd)

The DocuSign Other Actions also include options for signing a contract later, Print & Sign (to upload a wet ink signature pdf) and declining to sign a contract (see following note).

**Note:** Declining to sign a contract voids all signatures already on the contract and the signing process will have to start again. If you have questions, please contact the following:

- [OSPContracts@mdanderson.org](mailto:OSPContracts@mdanderson.org) for Private Industry contracts
- [OSP@mdanderson.org](mailto:OSP@mdanderson.org) for Non-Private Industry contracts
- [CPRIT@mdanderson.org](mailto:CPRIT@mdanderson.org) for CPRIT awards

**1** FINISH LATER  
Save the document in its current state and finish the signing process at a later time.

**2** PRINT & SIGN  
Print the document and sign in ink. Then either scan and upload or fax back the document.

DECLINE TO SIGN  
Notify the sender that you refuse to sign the document.

**3a** Print & Sign  
How would you like to return your signed document?  
 Upload

**3b** Print & Sign: Download Document  
Please download the document. Then print, sign and scan the document back into DocuSign when you are ready.

**3c** Print & Sign: Return Document  
**3d** UPLOAD A FILE

**4** DECLINE TO SIGN  
Notify the sender that you refuse to sign the document.

### Sign a Contract Later

1. If you aren't ready to sign, click **Finish Later** to exit the contact.

Return to the contract by clicking **Review Document** in the email you received.

### Print and Sign a Contract

2. Click **Print & Sign**.
3. To upload a signed contract:
  - a. Select **Upload** and then click **Continue**.
  - b. Click **Download** to download the contract and then print and sign it.
  - c. Click **Return Document** to upload the signed document.
  - d. Next, click **Upload a File** to complete the process and hit **Finish**.

### Decline to Sign a Contract

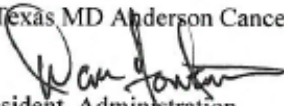
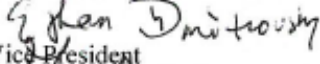

See note above before declining to sign a contract.

4. Click **Decline to Sign**.

## MEMORANDUM

**DATE:** February 24, 2016

**TO:** The University of Texas MD Anderson Cancer Center Industry Partners

**FROM:** Dan Fontaine, JD   
 Executive Vice President, Administration  
 Ethan Dmitrovsky, MD   
 Provost and Executive Vice President  
 George Wilding, MD   
 Vice Provost, Clinical & Interdisciplinary Research

**RE:** Streamlining Clinical Trial Contract Execution by Use of Electronic Signatures

The University of Texas MD Anderson Cancer Center has designated streamlining of its clinical trial activation processes as a major institutional priority to speed the access of the most promising novel agents to our patients who are waiting desperately for potentially life-saving treatment options.

In evaluating causes of delays in the activation of our industry-sponsored clinical trials, it became clear that the requirement for hard-copy, “wet ink” signatures from the relevant officials of both parties on the finalized, fully negotiated contractual agreements often results in days or even weeks of delay in executing those agreements.

Therefore, beginning November 2015, MD Anderson has implemented DocuSign®, an **electronic signature process** that is commonly used in banking and other highly security-sensitive business enterprises, for our sponsored clinical trial contractual agreements, with a goal to accelerate execution timelines for these institutionally binding contracts. Since its release, signature routing for several contractual agreements utilizing the DocuSign® software has been completed in as little as 1 business day, thus drastically reducing the time to contract execution for these studies. At the same time, we have also noted that some of our contracting partners either won’t allow or have inconsistent practices regarding use of electronic signatures.

We are urging all of our industry partners to utilize this legally binding and secure mechanism and to inform your legal/contract specialist teams, as applicable, of your support for this new, time-saving initiative to streamline the clinical trial activation process. Our Office of Sponsored Programs (OSP) serves as the direct point of contact for any questions regarding the electronic signature application being utilized and/or the new electronic signature process. Please feel free to contact Renee Gonzales, Executive Director, Office of Sponsored Programs, by email at [rkgonzales@mdanderson.org](mailto:rkgonzales@mdanderson.org), or by phone at 713-792-3220.

Thank you in advance for your cooperation, and for your support of our mutual ongoing commitment to bringing the most promising agents into clinical trials for our patients battling cancer. We look forward to an enhanced partnership working towards more efficient and effective clinical trial activation timelines.

cc: Steven I. Sherman, MD, Associate Vice Provost, Clinical Research  
 Renee Gonzales, Executive Director, Office of Sponsored Programs

## eSignatures FAQs

### Are DocuSign's electronic signatures legally binding?

DocuSign eSignatures are valid and legally binding across the globe and in use in 188 countries around the world. In fact, we offer industry-leading levels of eSignature enforceability and help you comply with the U.S. federal ESIGN Act and UETA Act, as well as many other international laws and statutes including components of the European Directive 1999/93 EC on a Community Framework for Electronic Signatures, including the UK Electronic Communication Act.

### Are DocuSign's electronic signatures secure?

DocuSign eSignatures offer bank-grade security and operations. Each electronic signature is unique, documentable, encrypted, and tamper-evident. DocuSign guarantees the confidentiality of all transactions and provides multi-faceted verification of signing events.

### Are DocuSign's electronic signatures available outside of the U.S.?

DocuSign is the global standard for Digital Transaction Management with more than 50 million users in 188 countries around the world. Send a document from Paris, sign it in Tokyo or San Francisco and close business in minutes. With DocuSign, you can sign in any time zone, anywhere business takes you.

### What languages does DocuSign support?

DocuSign offers 13 sending languages (including U.S. English) and the ability to sign documents in 43 localized languages. [Information on specific languages.](#)

### Can I use DocuSign eSignatures on my smartphone or tablet?

With DocuSign's mobile app you can prepare and send documents for signature, complete in-person signing, and get instant visibility into your document status directly from your smartphone or tablet. DocuSign mobile clients are available worldwide in Apple's iOS App Store, Google Play, Windows Phone, and Windows stores. [Get the app now.](#)

### Are digital signatures the same as electronic signatures?

An electronic signature, or e-signature, is an electronic indication of intent to agree to or approve the contents of a document. A [digital signature](#) is a type of electronic signature. Digital signatures are based on a specific technology that enables users to ensure the authenticity of the signer and to trust that a signature is valid through the use of digital certificates and a public and private key pair.

<https://www.docusign.com/how-it-works/electronic-signature>