

Request Signatures



You can request signatures on one document or multiple documents.

Search

- Announcements
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- My Downloads 2
- Need Help?

Import Documents

Drag files here or **browse**.

IMPORT VIA EMAIL

Binders > Nick Self Test

CREATE NEW ACTIONS Filter by...

Type	Name	Count	Last Modified	Actions
<input type="checkbox"/>	_Test	7	16-Oct-2020 @ 2:10 PM EDT	
<input checked="" type="checkbox"/>	An Interest		17-Oct-2020 @ 3:11 PM EDT	
<input type="checkbox"/>	Confident	2	13-Oct-2020 @ 3:06 PM EDT	
<input type="checkbox"/>	Correspondence	2	28-Sep-2020 @ 5:10 PM EDT	
<input type="checkbox"/>	CRF Blank and Other Study Specific Forms	0	05-Aug-2020 @ 1:53 PM EDT	
<input type="checkbox"/>	Delegation of Authority	0	05-Aug-2020 @ 1:53 PM EDT	
<input type="checkbox"/>	FDA 1572	0	05-Aug-2020 @ 1:53 PM EDT	
<input checked="" type="checkbox"/>	FDA1571 - Required Form Example		11-Oct-2020 @ 12:36 PM EDT	

Actions menu items: Assign to Timelines, Create Shortcuts, Delete, Download, Duplicate, Move, Request Signatures, Mark Document(s) as PHI

How?

1. Select document(s) to be signed
2. Select *Requests Signature* from ACTIONS drop down

Signature - Selecting Documents

Request Signatures ✕

First select the documents to be signed. Then select 1 or more potential signers. Complete all required fields on all tabs.
View the Pending tab to send reminders or modify existing requests. Hover over column headings and icons for details.

Documents (1) Signers (0) Pending (0)

SELECT DOCUMENTS ACTIONS Bulk Assign Options

<input type="checkbox"/> Location/Name	Signature Type	Reason *
<input type="checkbox"/> Study ABC		
<input type="checkbox"/> 2. Dr Flo CV_Example copy		Select Reason * ▾

Add Comment

Add your comments here

Request Signatures ✕

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Documents (1) Signers (0) Pending (0)

SELECT DOCUMENTS ACTIONS Bulk Assign Options

<input type="checkbox"/> Location/Name	Signature Type	Reason *
<input type="checkbox"/> Study ABC		
<input type="checkbox"/> 2. Dr Flo CV_Example copy		Select Reason * ▾

Select Documents ✕

Use checkboxes to add or remove documents from this request.
At least 1 document is required. All selected documents appear in the tree below.

- Example
- Sample Study
- Study ABC
 - 2. Dr Flo CV_Example copy
 - 3. Lab Reference Ranges_Sample copy
- Test

Total Selected: 2

How?

1. To request a signature on a document(s), click *Select Documents* on the documents tab
2. When the *Select Documents* pop up window opens, select the additional documents from the Binders/Folders you have permission to view and click *Save*
3. Select the Signature Type and Reason for each document

Signature - Selecting Signers

Request Signatures

First select the documents to be signed. Then select 1 or more potential signers. Complete all required fields on all tabs. View the Pending tab to send reminders or modify existing requests. Hover over column headings and icons for details.

Documents (1) **Signers (0)** Pending (0)

Select/search for signers

	Sign by Date	Notify Me	Email Signer
<input type="checkbox"/> Amanda Korey			
<input type="checkbox"/> dipti.rao@florencchc.com			
<input type="checkbox"/> Florence Support			
<input type="checkbox"/> Lauren Martin			
<input checked="" type="checkbox"/> Leiselle Clark			
<input checked="" type="checkbox"/> Nakema Glanton			
<input checked="" type="checkbox"/> Rose Martin			
<input type="checkbox"/> wade.smith@florencchc.com			

Search box above to select one or more Signers.

Add Comment

Add your comments here

0/2000

CANCEL SUBMIT

- From the *Signers* tab, select the user(s) you would like to request a signature(s) from

Request Signatures

First select the documents to be signed. Then select 1 or more potential signers. Complete all required fields on all tabs. View the Pending tab to send reminders or modify existing requests. Hover over column headings and icons for details.

Documents (2) Signers (3) Pending (6)

ACTIONS

Document / Signers	Signature Type	Reason *	Sign By Date	Notify Me	Remind Signer
Study ABC					
2. Dr Flo CV_Example copy					
<input type="checkbox"/> Leiselle Clark	Any	Acknowledge	None	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Nakema Glanton	Any	Acknowledge	None	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Rose Martin	Any	Acknowledge	None	<input type="checkbox"/>	<input type="checkbox"/>

Remember: The list of signers will only display users who have signing permissions for one or more of the selected documents.

Signature Request - Pending

View the *Pending* tab to send reminders or modify existing signature requests.

Request Signatures

First select the documents to be signed. Then select 1 or more potential signers. Complete all required fields on all tabs. View the Pending tab to send reminders or modify existing requests. Hover over column headings and icons for details.

Documents (3) Signers (3) **Pending (4)**

ACTIONS ▾

<input type="checkbox"/> Document / Signers	Signature Type ⓘ	Reason *	Sign by Date	Notify Me	Remind Signer
Study ABC 123 / Folder A / Folder B /					
Form XYZ 123					
<input type="checkbox"/> Dr. John Smith	Addendum ▾	Certified Copy ▾	none	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/> Ima T. Lorem	Stamp ▾	Responsibility ▾	30-Oct-2020 @ 12:00 AM	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Study ABC 123 / Folder A / Folder B /					
Document Summary Project R					
<input type="checkbox"/> fursLahst@medcenter.org	Log	Acknowledge ▾	none	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Ima T. Lorem	Stamp ▾	Acknowledge ▾	none	<input type="checkbox"/>	<input type="checkbox"/>

Add Comment

Add your comments here

0/2,000

CANCEL SUBMIT

Request Signatures

First select the documents to be signed. Then select 1 or more potential signers. Complete all required fields on all tabs. View the Pending tab to send reminders or modify existing requests. Hover over column headings and icons for details.

Documents (2) Signers (3) **Pending (6)**

ACTIONS ▾

- Mark Canceled
- Undo Changes

<input type="checkbox"/> Document / Signers	Signature Type	Reason *	Sign By Date	Notify Me	Remind Signer
Study ABC					
2. Dr Flo CV_Example copy					
<input checked="" type="checkbox"/> Leiselle Clark	Any ▾	Acknowledge ▾	None	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Nakema Glanton	Any ▾	Acknowledge ▾	None	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Rose Martin	Any ▾	Acknowledge ▾	None	<input type="checkbox"/>	<input type="checkbox"/>

Signature Request - Pending

Documents Tab

Request Signatures ✕

First select the documents to be signed. Then select 1 or more potential signers. Complete all required fields on all tabs. View the Pending tab to send reminders or modify existing requests. Hover over column headings and icons for details.

Documents (2) **Signers (0)** **Pending (2)**

SELECT DOCUMENTS ACTIONS ▾ Bulk Assign Options

<input type="checkbox"/> Location / Name	Signature Type	Reason*
Study ABC 123 / Folder A / Folder B /		
<input type="checkbox"/> A Doc with a Longish name that almost wraps	Any ▾	Select Reason ▾
<input type="checkbox"/> Form abc	Only pending requests for this document. See Pending tab.	

Signers Tab

Request Signatures ✕

First select the documents to be signed. Then select 1 or more potential signers. Complete all required fields on all tabs. View the Pending tab to send reminders or modify existing requests. Hover over column headings and icons for details.

Documents (3) **Signers (3)** **Pending (2)**

Select/search for signers ▾ ACTIONS ▾ Bulk Assign Options

<input type="checkbox"/> Name	Sign by Date	Notify Me	Email Signer
<input type="checkbox"/> Chris. R. Longname	All documents have pending requests. See Pending tab.		
<input type="checkbox"/> newuser.lastname@medicalcenter.org	<input type="text" value="None"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/> Dr. John Johnson	<input type="text" value="None"/>	<input type="checkbox"/>	<input type="checkbox"/>



The airplane icon indicates a *Pending Signature* request already exists on document

Signature Request - Permissions

Documents Tab

Request Signatures

First select the documents to be signed. Then select 1 or more potential signers. Complete all required fields on all tabs. View the Pending tab to send reminders or modify existing requests. Hover over column headings and icons for details.

Documents (5) Signers (3) Pending (4)

SELECT DOCUMENTS

ACTIONS

Bulk Assign Options

Location / Name

Signature Type

Reason

Study ABC 123 / Folder A / Folder B /

Document aAbBcC long text long text long text long text long text Stamp Acknowledge

Log File XYZ Entire Log Select Reason

Study ABC 123 / Folder R / Procedures /

A Doc with a Longish name that almost wraps Any Select Reason

Document aAbBcC Stamp Acknowledge

Document aAbBcC long text long text long text long text long text with a lot more words that wrap to the second line text long text with a lot more words that wrap to the second line Addendum Select Reason

Signers Tab

Request Signatures

First select the documents to be signed. Then select 1 or more potential signers. Complete all required fields on all tabs. View the Pending tab to send reminders or modify existing requests. Hover over column headings and icons for details.

Documents (3) Signers (4) Pending (1)

Select/search for signers

ACTIONS

Bulk Assign Options

Name

Sign by Date

Notify Me

Email Signer

Chris. R. Longname 15-Nov-2020 @ 12:00 PM

Ima T. Lorem None


Dr. Anindivijal W.A. Longernamethanuvseen 29-Oct-2020 @ 12:00 PM

newuser.lastname@medicalcenter.org None







The lock icon indicates the user does not have the necessary permissions to sign one of the requested documents

Signature Request - Permissions

 **No Signing Permissions** ✕




These users **do not have permission to sign** the documents listed below and **will not receive requests** for these documents. You can proceed with the other requests, or you can remove these signers or documents from the corresponding tabs.


 Study ABC 123 /  Folder A /  Folder B /

 Form XYZ 123 ABC

Dr. Sam Samuels (sam.samuelso3@med.org)

Ima T. Lorem (ima.t.lorem@med.org)

 Study ABC 123 /  Folder A /  Folder Z /

 Document A B C 1 2 3

Ima T. Lorem (ima.t.lorem@med.org)

Janice Janison (jj@med.org)

CLOSE

Some signers lack signing permission for certain documents. Click on *View details* to see which signers do not have signing permissions and on which document(s)

Bulk Signature Request - Email



You Have Multiple Signature Requests

Hi Pat,

Ready, set, sign! Chris Samplename sent you signature requests for multiple documents. See details below and click on the button to sign.

Requested by:	Chris Samplename
Requested on:	02-Sep-2020 @ 6:53 AM EDT
Team:	Placebo Pharmaceuticals Company
Documents:	25 documents
Comments:	Refer to xyz doc

[Sign Documents](#)

You will receive one email for all bulk signature requests