

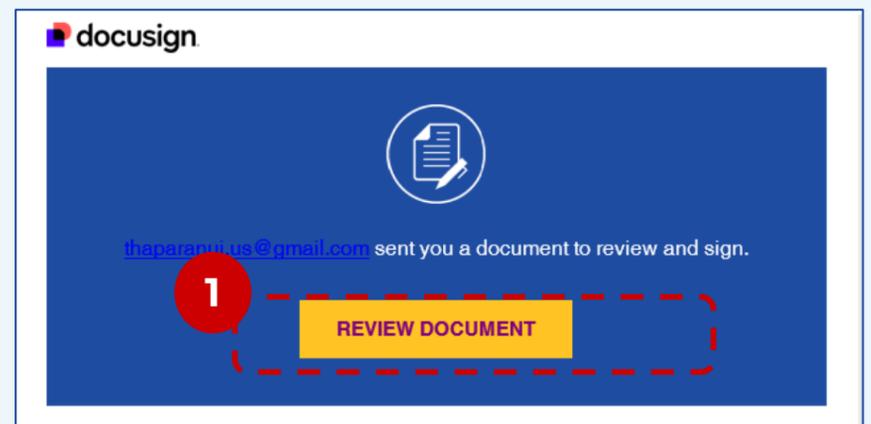
This job aid is intended for users at the Sponsor level and assumes that the CDA has already been sent to and completed by the Site.

Site users will have three options for signing the CDA. At the Sponsor level, our responsibility is to review and approve the completed forms. This job aid will cover how to review and approve each of the following form completion methods:

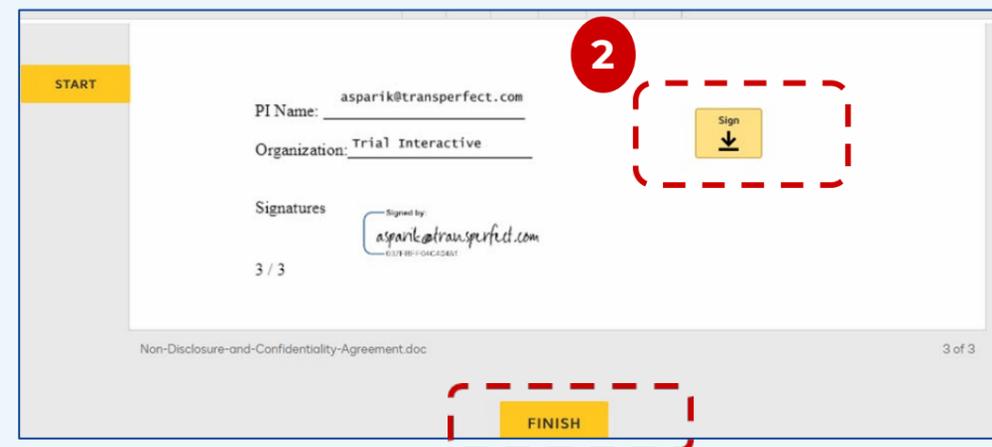
- Approving a CDA that has been signed Electronically
- Approving a CDA that has been signed with a Wet Signature
- Reviewing/Approving an Agreement Text Change to the CDA

Approving Electronically

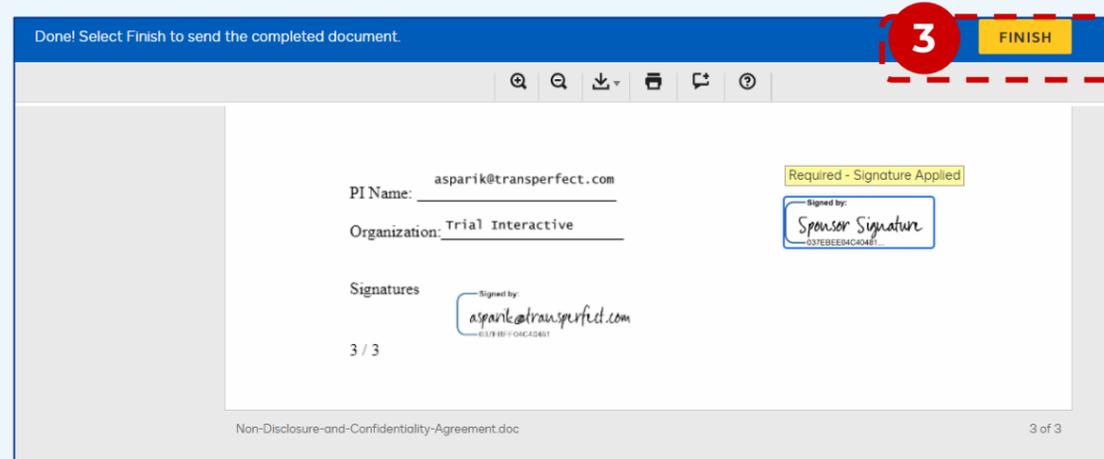
1 Once the form has been completed by the site, sponsors will receive an email which notifies them that a CDA is available for review in DocuSign. Click “review document” within the email which will open the CDA in DocuSign.



2 Click **Sign** on the bottom of the form to apply your electronic signature. Click Finish.



3 The electronic signature will appear on the right. Click finish to finalize.

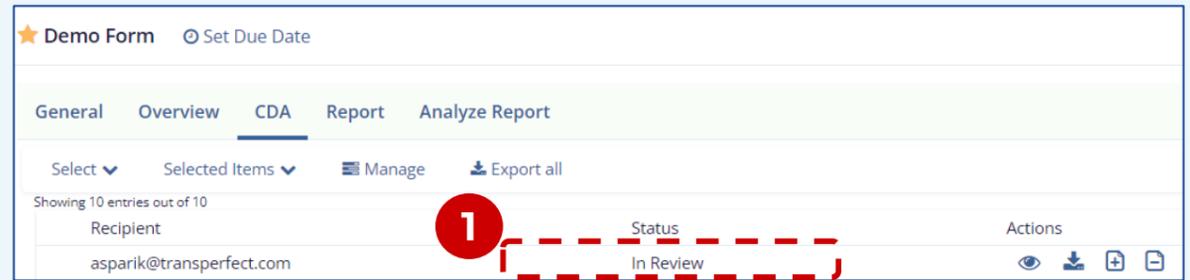


How to Review and Approve a Confidentiality Agreement Form

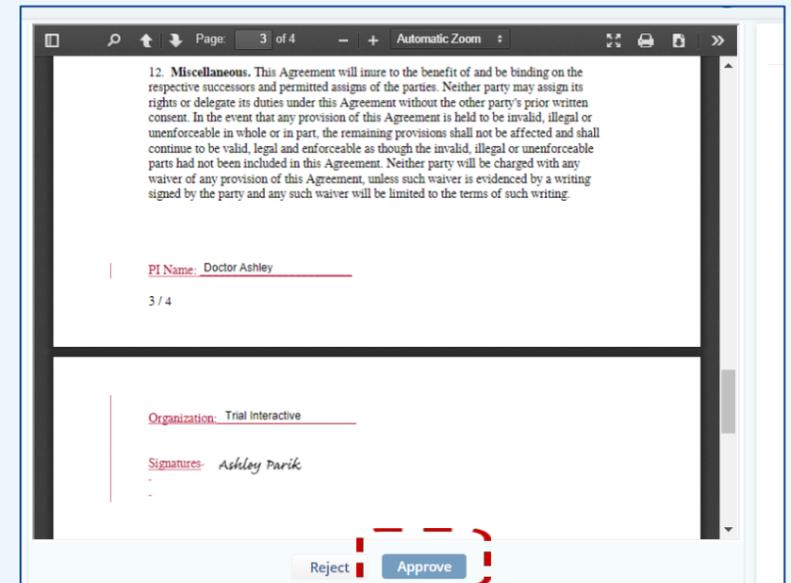
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Approving a Wet Signature

1 When a CDA is signed with a wet signature and uploaded by the Site, the status within the CDA tab changes from **Signature Needed** to **In Review**.



2 To preview the document, click on the eye icon under the actions column. Once reviewed, the signed form can be approved or rejected. To approve the signed CDA, click approve.



*Note: The form can be approved or rejected without previewing first by clicking the + or – icon under **Actions**

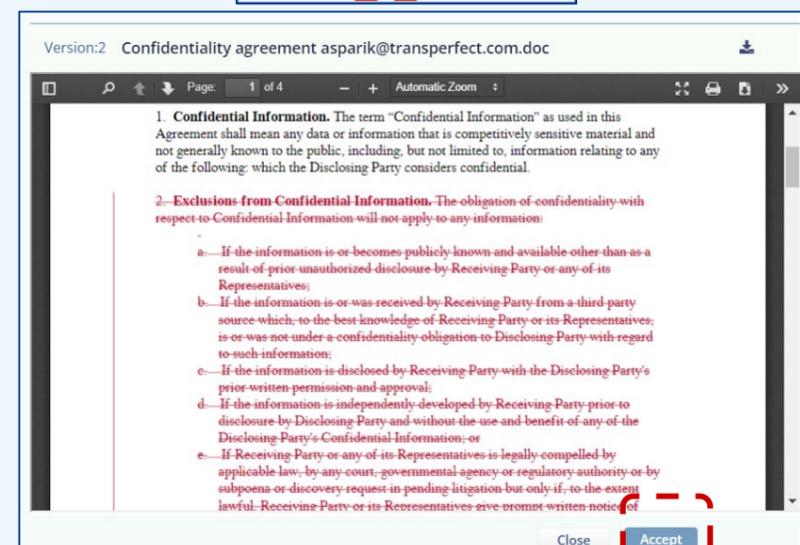
Reviewing/Approving Change Agreement Text

Sponsors will need to review and accept any proposed changes that the site has made to the CDA.

1 Navigate to the CDA tab within the systems and locate the form with the status **Pending Verification**.



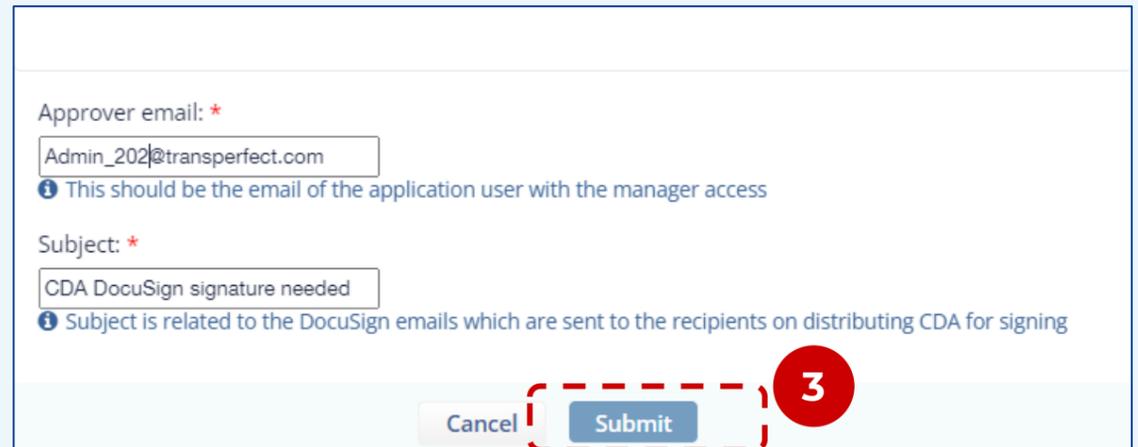
2 Click on the “eye” icon to review the changes made to the document. If the changes are approved, click **Accept**.



How to Review and Approve a Confidentiality Agreement Form

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- 3 Double check the approver email address, then click **Submit**.



Approver email: *

Admin_202@transperfect.com

This should be the email of the application user with the manager access

Subject: *

CDA DocuSign signature needed

Subject is related to the DocuSign emails which are sent to the recipients on distributing CDA for signing

Cancel Submit

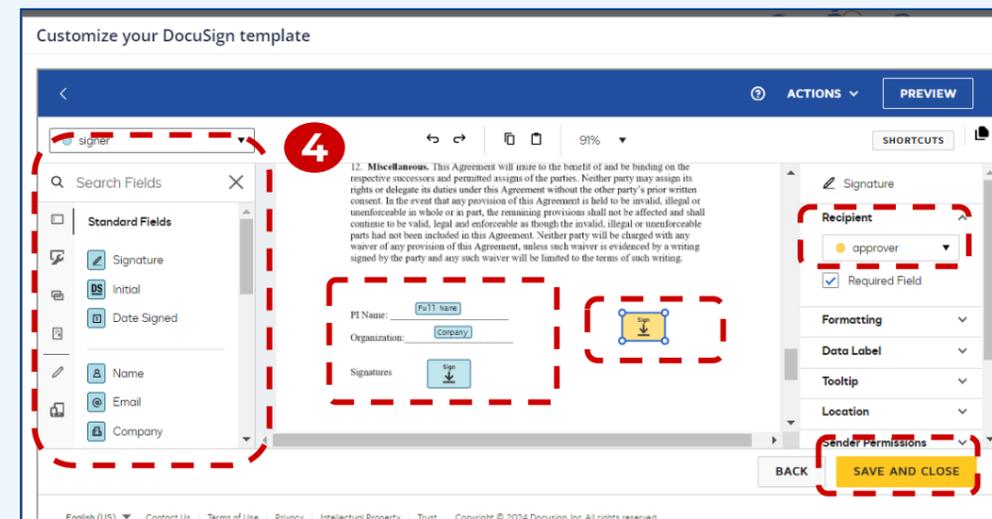
The required fields must be added back into the DocuSign Template.

- 4 Drag and drop the Signer fields – indicated in blue (Name, Company, Signature) onto the form.

The Sponsor (Approver) signature field indicated in yellow will also need to be added.

Once the fields have been added back in, click save and close.

The document will go back to the Site for signature now that the changes have been approved.



Customize your DocuSign template

4

Standard Fields

- Signature
- Initial
- Date Signed
- Name
- Email
- Company

12. Miscellaneous. This Agreement will issue to the benefit of and be binding on the respective successors and permitted assigns of the parties. Neither party may assign its rights or delegate its duties under this Agreement without the other party's prior written consent. In the event that any provision of this Agreement is held to be invalid, illegal or unenforceable in whole or in part, the remaining provisions shall not be affected and shall continue to be valid, legal and enforceable as though the invalid, illegal or unenforceable parts had not been included in this Agreement. Neither party will be charged with any waiver of any provision of this Agreement, unless such waiver is evidenced by a writing signed by the party and any such waiver will be limited to the terms of such writing.

PI Name: Full Name

Organization: Company

Signatures: Sign

Recipient: approver

Required Field

Formatting

Data Label

Tooltip

Location

Sender Permissions

BACK SAVE AND CLOSE