Research Administrators: How to Send the NIH Other Support Document to a Researcher for Electronic Signature via DocuSign

Last Updated: January 21, 2022

As of January 25, 2022, the NIH Other Support (OS) document must be electronically signed by PD/PIs and Senior/Key personnel. As a research administrator who prepares OS files, you can send the finalized files to researchers for electronic signature through DocuSign, the only Princeton University approved solution for electronic signatures. The University is not licensed for Adobe Sign or other electronic signature products. The DocuSigned file must be flattened (via "print to PDF") for upload to the NIH K application, JIT, or RPPR.

1. [Request and activate your Princeton DocuSign account](#) if you do not have one already. The researcher also needs to request and activate a Princeton DocuSIgn account.
2. Navigate to https://app.docusign.com.
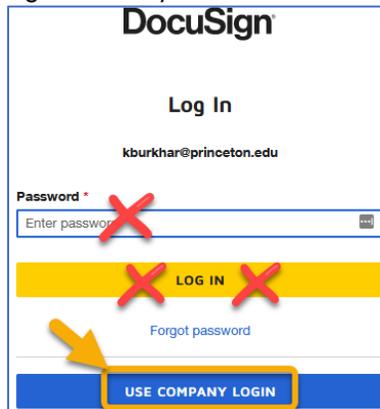3. Enter your Princeton email address and click on Next.

4. Do not enter a password; instead click on "Use Company Login" and sign on with your Princeton Single Sign On.

5. Click the Start button and select "Send an Envelope"
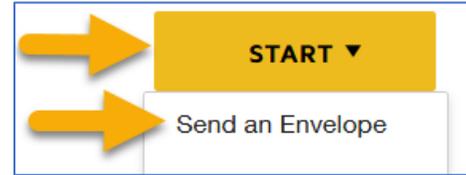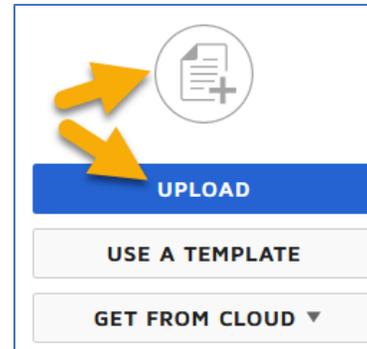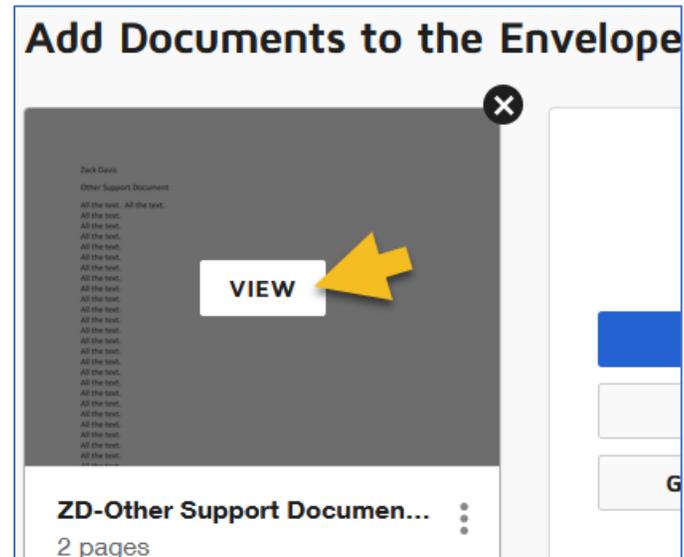

6. Drag and drop the file onto the document icon, or click Upload to find the final Other Support file + click on Open.

7. The file now appears in the upper left corner. Hover over the document to see the View button appear.

8. Click on the View button to view the file. Use the scroll bar to scroll through all pages of the file to verify it is the complete and final file, then click the x to close the window.
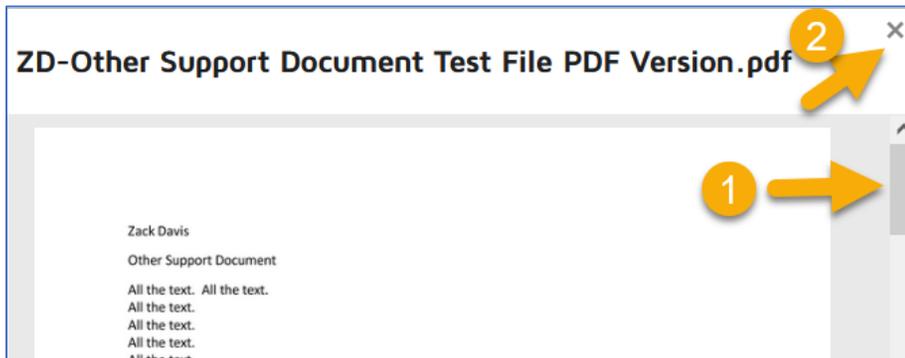
9. Scroll down to the "Add Recipients to the Envelope" section and enter the name and email of the researcher who needs to sign. You may need to manually enter the name and email address of the person, or the researcher may be available for selection.

10. Scroll down to the "Message to All Recipients" section. Change the default email subject to include identifying information such as the researcher's name, the FP# or award #. By default, there is no email message, but you can add one and include your name (because the email is sent from docusign.net, not from your email address.) Then click Next in the lower right corner.

11. Scroll to the section of the document that contains the Signature field.
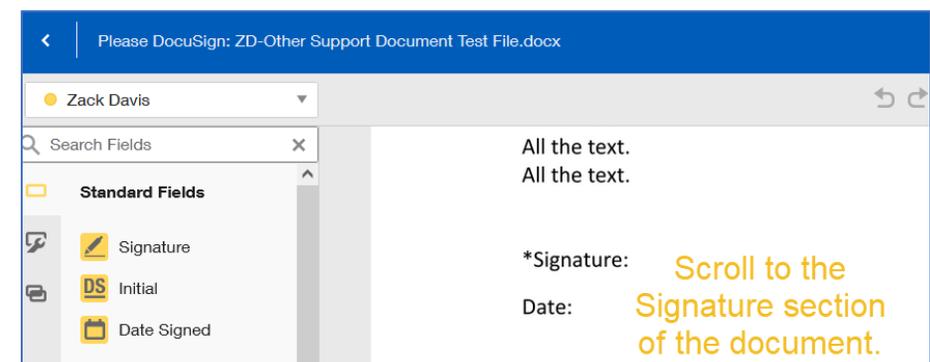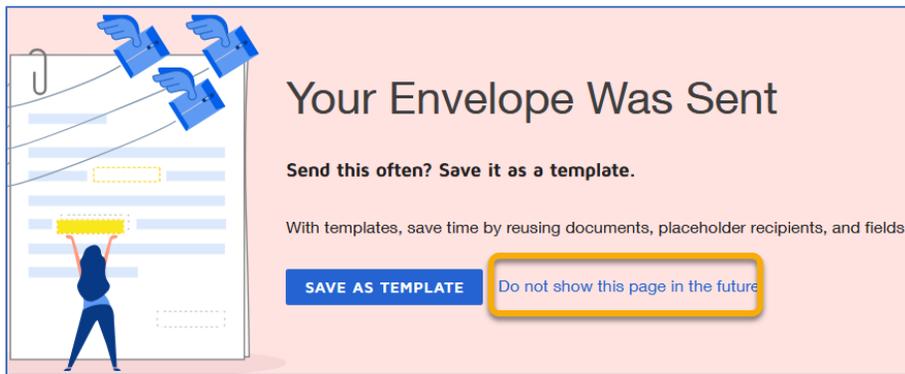
12. On the left side, drag the yellow "Signature" field from the left bar and drop it next to Signature. Drag the yellow "Date Signed" field from the left bar next to Date. Move the yellow boxes if you don't like the placement.
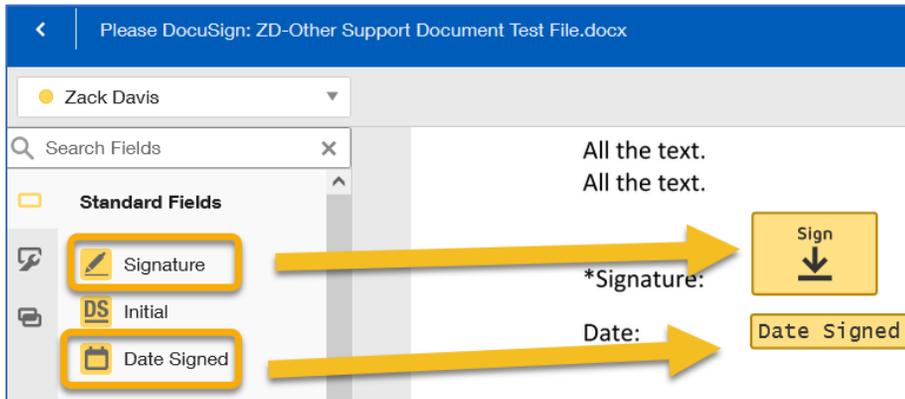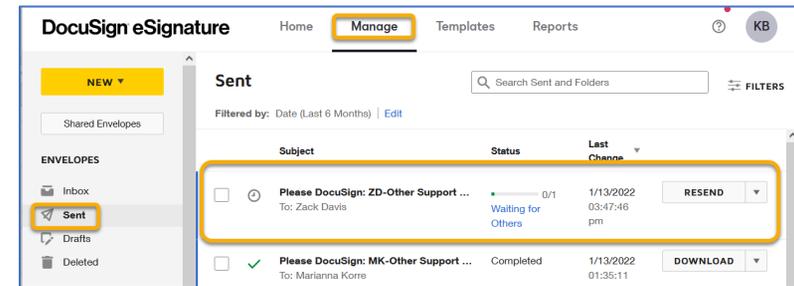

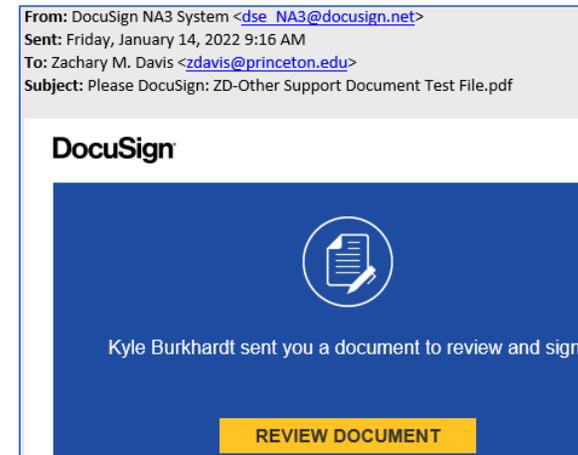13. Then click Send in the lower right corner.

14. If you see this page, click "Do not show this page in the future".

15. The document you just sent to your researcher will be in your DocuSign Manage menu in the Sent folder.

16. Your researcher will receive an email from DocuSign.net:

17. instructions for how researchers can DocuSign the form you just sent them are available.

18. When your researcher clicks on the "review document" button, you will receive an email that the file has been opened:

19. When the researcher signs the file, you will receive an email that the file has been signed. The signed file is attached to the email, and is also in your DocuSign account.
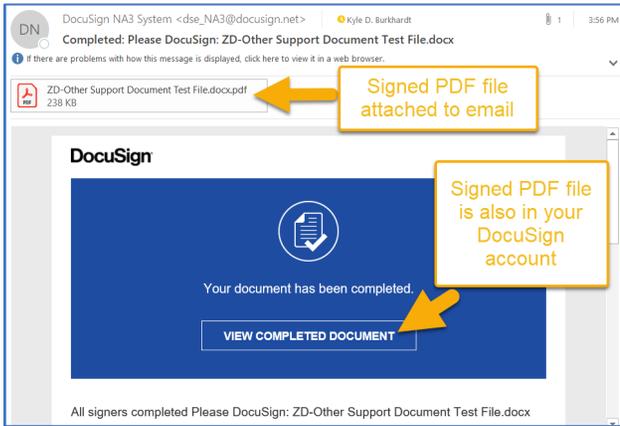

20. To access the file: click on the file attached to the email or click on the "view completed document" button in the email which directly opens the signed file. The file can also be directly accessed within DocuSign itself by logging to app.docusign.com, click on Manage, click on Completed in the left navigation bar, click on the subject, then click on the image of the file in the upper right corner.
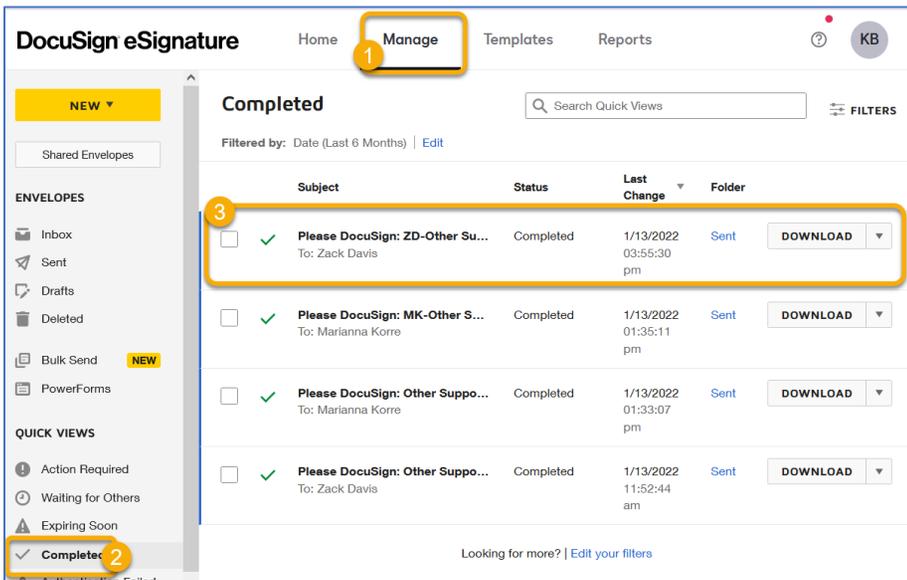
21. Scroll down to view the completed DocuSigned signature and date.
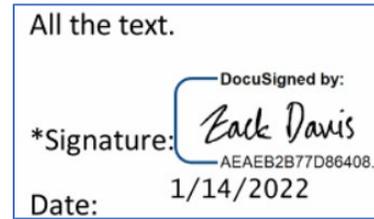
22. If you are uploading the file to the NIH K application, JIT, or RPPR, the file has to be "flattened", which means "print to PDF". There are a few ways to do this. One way is to click the arrow next to Download and select Print.
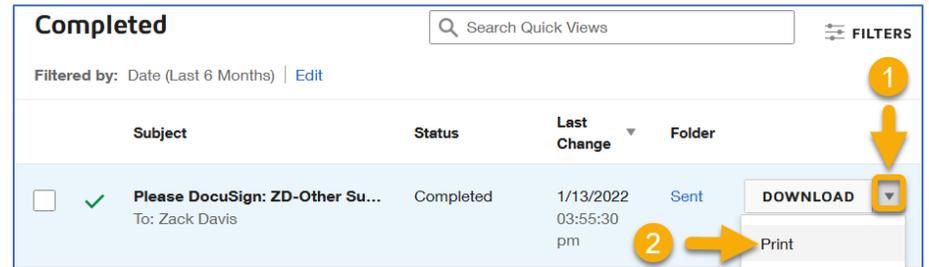
23. Select "Adobe PDF" as your printer or destination, then press the "Print" button to save the flattened file to your computer. The flattened file is now ready for upload to the NIH K application, JIT, or RPPR.