

# HNE Research Office

## SOP 001: DocuSign Instructions

If the sponsor of the research project requests signature on contract via docusign, it is the responsibility of the requester (sponsor / research team) to follow the below steps to successfully request a document signed by the HNELHD CE Delegate (for Research). If you are using a non-standard contract please ensure HNE Research Office has reviewed the agreement before proceeding to the below.

1. Ensure that the correct Name and Position have been added to the signatory section on the agreement:
  - 1.1. Signed on behalf of the Institution:
    - 1.1.1. **Name: Kristy Morris**
    - 1.1.2. **Position: Manager Research Governance**
2. The document for signature must be uploaded to REGIS via:
  - 2.1. **For new site applications** – upon submission of [initial governance application \(SSA\)](#)
  - 2.2. **For amendments to original agreements** via [Site Amendment – Contract Changes](#)

**Please note that step 2 MUST be completed, and the HNE Research Governance team will let you know when the docusign can be sent to the HNE Research Delegate for signature. Agreements sent to the Research Delegate without following step 2 and without being instructed by the Research Governance Team to do so, will be automatically rejected within docusign**

3. Ensure that the recipients are set up and signed in the below order:
  - 3.1. **FIRST Signature:** Sponsor; Name and Email
  - 3.2. **SECOND Signature:** HNE Site PI; Name and Email
  - 3.3. **LAST Signature; HNE Research Delegate: Kristy Morris; [Kristy.Morris@health.nsw.gov.au](mailto:Kristy.Morris@health.nsw.gov.au)**
4. The subject line within docusign must include specific information identifying the agreement and the REGIS STE reference for the agreement
  - 4.1. **Example:** CTRA Variation 1 for project; 2023/STE098866

\*\* If you have different requirements for your electronic signature platform, please email [HNELHD-ResearchOffice@health.nsw.gov.au](mailto:HNELHD-ResearchOffice@health.nsw.gov.au) to discuss

### Related Resources

1. [Institution details](#)
2. [REGIS QRG - Site Amendment - Completing & Submitting](#)
3. [HNE Research Portal – Post Authorisation Management](#)
4. [REGIS QRG for submission of SSA](#)
5. [HNE Research Portal – How to Submit: SSA in REGIS](#)
6. [VIDEO - Send an Envelope with DocuSign](#)