

# How to Use DocuSign Other Support Template

1 Go to <https://myaccess.ucsf.edu/landing> and select DocuSign

The screenshot shows a list of applications on the UCSF MyAccess landing page. The 'DocuSign - UCSF' card is highlighted with a yellow background and has an orange circle around the application name. The card includes a star icon, the text 'DocuSign - UCSF', 'SSO', an information icon, a description: 'DocuSign is an electronic signature application that also manages routing of documents. If compliance please request access to our separate Part 11 instance.', and a 'Last Update: May 06, 2021' timestamp. Below it is the 'eProposal - iRIS' card, which also has a star icon, the text 'eProposal - iRIS', 'SSO', an information icon, a description: 'Proposal development, review, and submission', and a 'Last Update: October 19, 2021' timestamp.

2 Click "Templates"

The screenshot shows the DocuSign application interface in a browser. The address bar shows 'apps.docusign.com/send/home'. The navigation menu includes 'Home', 'Agreements', 'Templates', and 'Reports', with 'Templates' highlighted by an orange circle. The main content area is a blue dashboard with the text 'Welcome back' and a user profile for 'Catherine Dunn' (CD). To the right, under the heading 'Last 6 Months', there are three statistics: '2 Action Required', '0 Waiting for Others', and '0 Expiring Soc'. At the bottom, there is a button labeled 'Get Started or Use Templates'.

1. Click "Shared With Me"
2. Search for Other Support
3. Add to Favorites

The screenshot shows the DocuSign interface with the 'Templates' tab selected. The left sidebar has 'Shared with Me' highlighted with a red box and the number 1. The search bar at the top of the main content area contains 'Other Support' with a red box and the number 2. Below the search bar, a table lists search results. The first result is 'Other S... Eligible for matching' by Catherine Dunn, with a red box and the number 3 over the star icon. The table has columns for NAME, OWNER, POWERFORMS, and CREATED DATE.

NAME	OWNER	POWERFORMS	CREATED DATE
Other S... Eligible for matching	Catherine Dunn		8/23/2024 09:38:15 am

Looking for more Favorite Templates? [Go to All Templates](#) and

4. Click "Use Other Support Template"

This is a close-up of the search result from the previous screenshot. The 'Use' button is circled in red. The table below shows the details for the template.

NAME	OWNER	POWERFORMS	CREATED DATE	LAST CHANGE	FOLDERS
Other S... Eligible for matching	Catherine Dunn		8/23/2024 09:38:15 am	8/27/2024 02:09:24 pm	

Looking for more Favorite Templates? [Go to All Templates](#) and add more to Favorites.

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5 Add Principal Investigator or Senior/Key Personnel into the Name and email fields

## Add recipients

Key Personnel ✎ NEEDS TO SIGN ▾ CUSTOMIZE ▾ 🗑️

1

Name \*

Email \*

## Add message

6 Click "ADVANCED EDIT"

NEEDS TO SIGN ▾ CUSTOMIZE ▾ 🗑️

Due to recent UCSF non-compliance and in response to an NIH requested action plan, all Principal Investigators and Senior/Key Personnel are required to verify the statements below.  
[CSRF News Article: The NIH "Other Support" Document and the Importance of Overlap Disclosure](#)  
This verification must confirm that Other Support forms adhere strictly to NIH requirements regarding resources, scientific, budgetary, and commitment overlap as outlined in NIH GPS Section 2.5.1.  
[CSRF website](#) provides training material and resources including descriptions of overlap and examples of overlap statements.  
**PI and Senior/Key Personnel Attestations:**  

- I understand NIH policies and requirements for Other Support, including definitions of overlap, and that I have a professional and ethical responsibility to disclose any type of overlap.
- I understand that omitting information or failing to disclose scientific, budgetary, or commitment overlap is a violation of NIH policies and will lead to loss of grant funding.
- My signature on the Other Support form affirms that I have reviewed the information contained therein and all information is current, accurate, and complete.
- Submitting misinformation to NIH puts me at risk of violating UCSF Code of Conduct requirements, puts UCSF's reputation at risk, and could lead to NIH imposing increased administrative requirements or withholding funds.

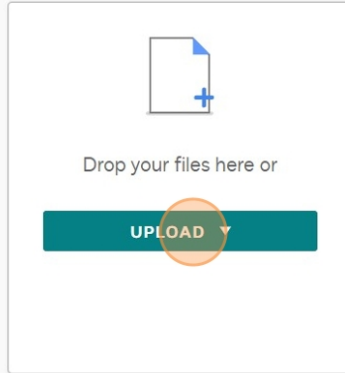
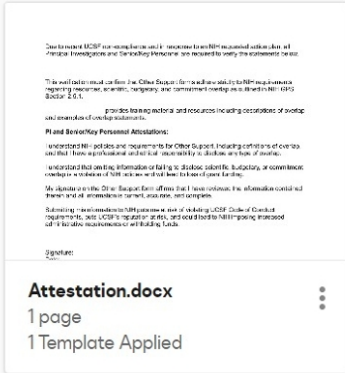
[CSRF Home](#) [🗑️](#)  
Signature:   
Date:

**ADVANCED EDIT** **SEND** ▾

10:55 AM  
8/30/2024

## 7 Upload the Senior/Key Personnel's Other Support Document

### Add documents



## 8 Optional: Add additional recipients to receive a copy of final documents

catherine.dunn@ucsf.edu

Name \*

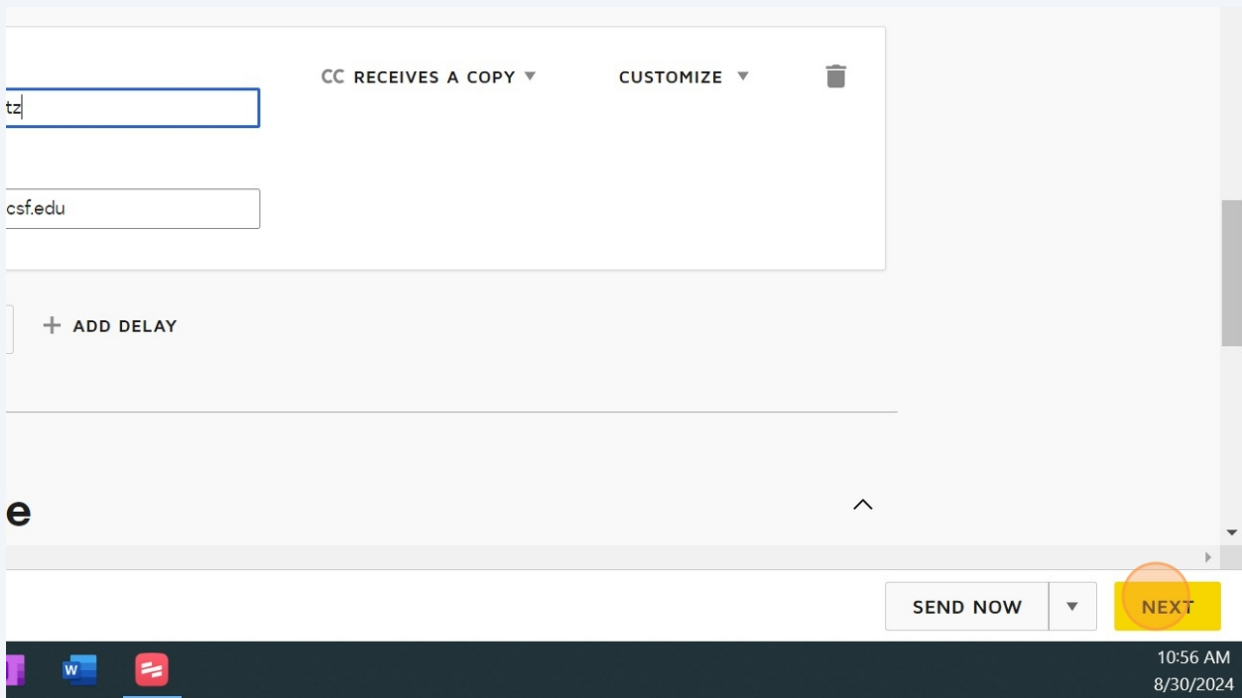
Email \*

NEEDS TO SIGN

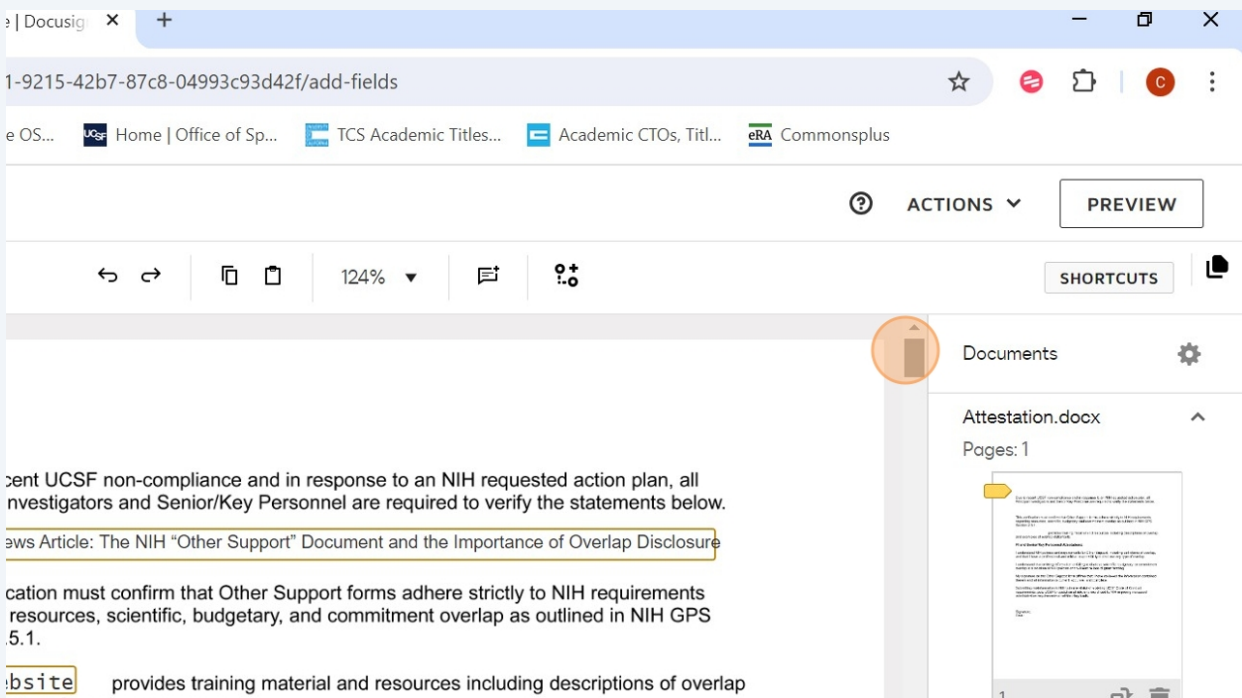
CUSTOMIZE

- Needs to Sign
- In Person Signer
- CC Receives a Copy
- Needs to Sign

9 One all recipients have been added, click "NEXT"



10 The Other Support document will be add after the attestation letter



11

Add the "Signature" and "Date Signed" fields to the bottom of the Other Support document

UCSF New Tab UCSF MyAccess: We... UCSF Welcome to the OS... UCSF Home | Office of Sp... TCS Academic Titles... Academic

Complete with Docusign: Other Support Verification

Catherine Dunn

Search Fields

Standard Fields

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

I, PD/PI or other senior/key personnel, certify that the statements herein are true, complete and accurate to the best of my knowledge, and accept the obligation to comply with Public Health Services terms and conditions if a grant is awarded as a result of this application. I am aware that any false, fictitious, or fraudulent statements or claims may subject me to criminal, civil, or administrative penalties.

\*Signature:  
Date:

12

Click "SEND". This will trigger an email to go out to the Key Personnel recipient.

r other senior/key personnel, certify that the statements herein are true, complete and accurate to the best of my knowledge, and accept the obligation to comply with Public Health Services terms and conditions if a grant is awarded as a result of this application. I am aware that any false, fictitious, or fraudulent statements or claims may subject me to criminal, civil, or administrative penalties.

Sign

Date Signed

Date Signed

Rules

OPEN RULES

Formatting

Data Label

Location

SAVE AS CUSTOM FIELD

DELETE

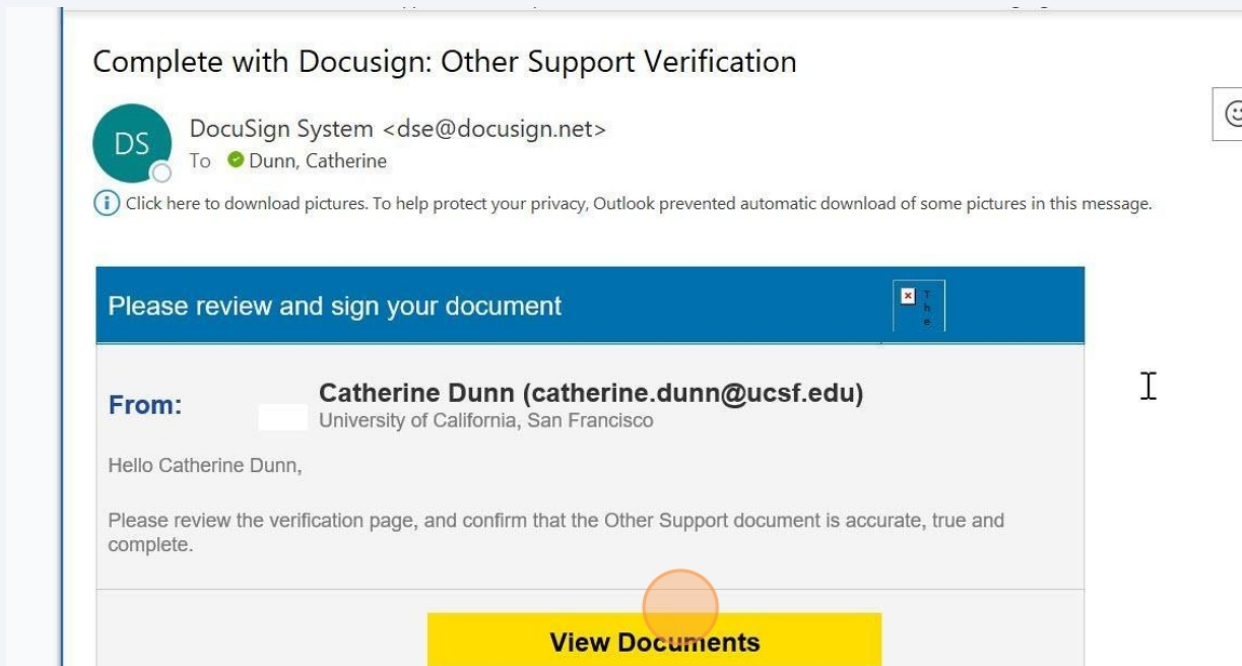
BACK SEND

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10:56 AM  
8/30/2024

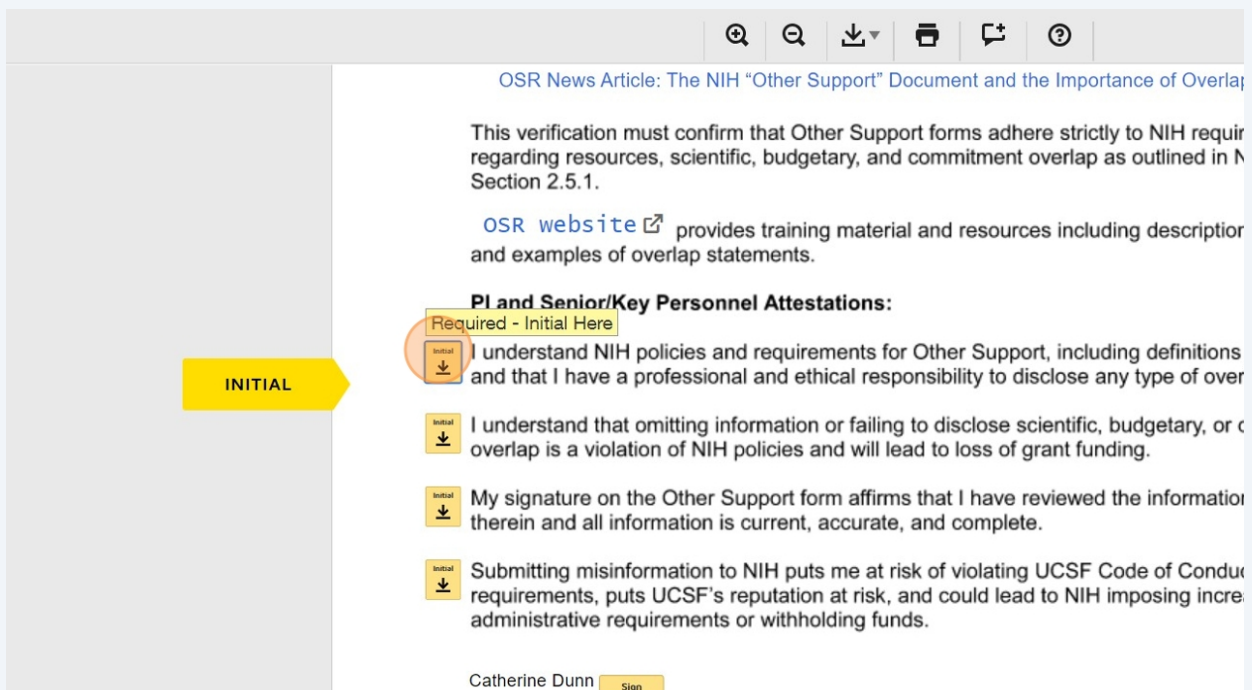
13

The Senior/Key Personnel selects "View Documents" from the Docusign notification email.



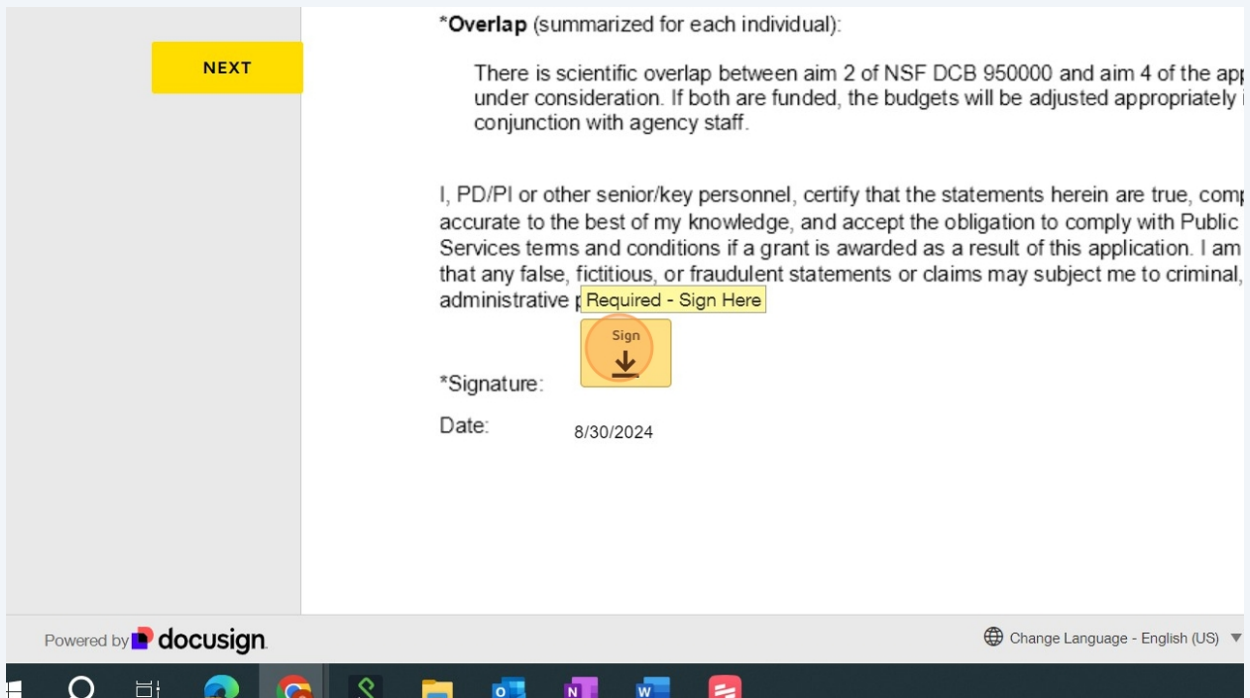
14

Senior/Key Personnel will be required to initial and sign the attestations cover page.





## 15 Senior Key Personnel will be required to sign the Other Support document



**NEXT**

**\*Overlap** (summarized for each individual):

There is scientific overlap between aim 2 of NSF DCB 950000 and aim 4 of the application under consideration. If both are funded, the budgets will be adjusted appropriately in conjunction with agency staff.

I, PD/PI or other senior/key personnel, certify that the statements herein are true, complete and accurate to the best of my knowledge, and accept the obligation to comply with Public Services terms and conditions if a grant is awarded as a result of this application. I am aware that any false, fictitious, or fraudulent statements or claims may subject me to criminal, administrative or civil penalties.

**Required - Sign Here**

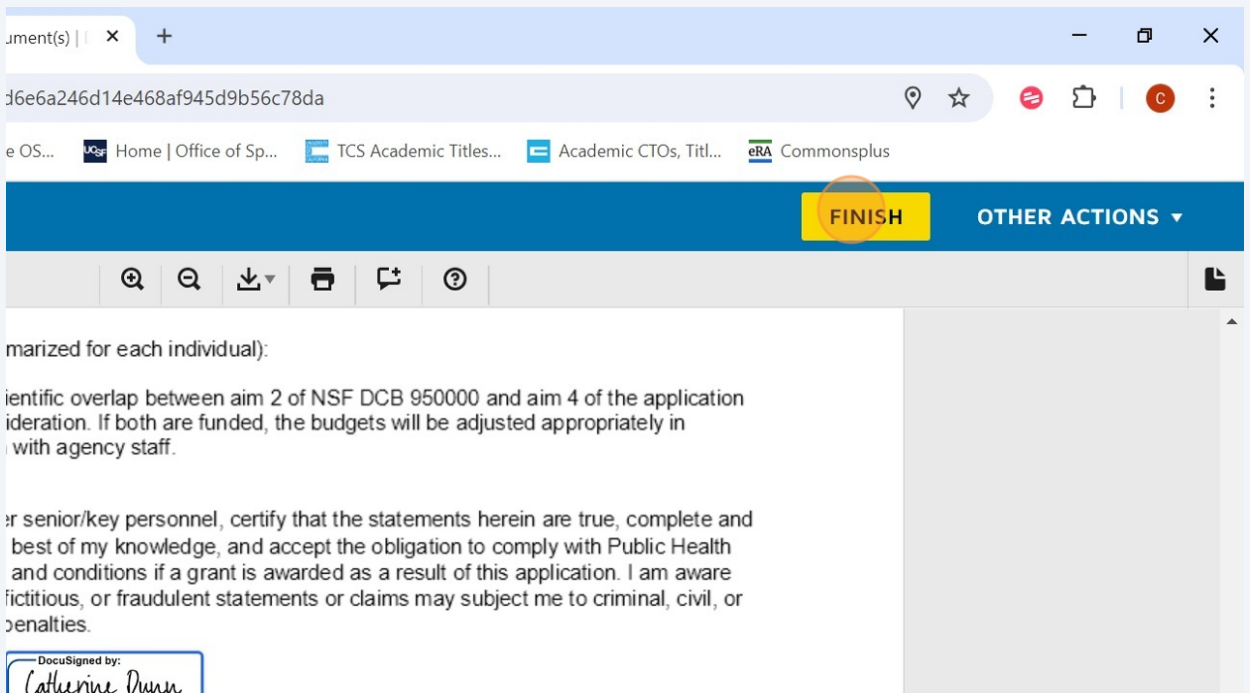
**Sign**

**\*Signature:**

**Date:** 8/30/2024

Powered by **docuSign** Change Language - English (US)

## 16 Click "FINISH"



Document(s) | x +

16e6a246d14e468af945d9b56c78da

e OS... Home | Office of Sp... TCS Academic Titles... Academic CTOs, Titl... eRA Commonsplus

**FINISH** **OTHER ACTIONS** ▾

marized for each individual):

ientific overlap between aim 2 of NSF DCB 950000 and aim 4 of the application nderation. If both are funded, the budgets will be adjusted appropriately in with agency staff.

r senior/key personnel, certify that the statements herein are true, complete and best of my knowledge, and accept the obligation to comply with Public Health and conditions if a grant is awarded as a result of this application. I am aware fictitious, or fraudulent statements or claims may subject me to criminal, civil, or enalties.

DocuSigned by:  
*Catherine Dunn*



17 Email will be sent to all recipients with the completed documents.

## Completed: Complete with DocuSign: Other Support Verification



DocuSign System <dse@docusign.net>

To Dunn, Catherine

Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this

Your document has been completed



Sent on behalf of DocuSign

Catherine Dunn,

All parties have completed the envelope 'Complete with DocuSign: Other Support Verification'.

To view, download or print the completed document click below.

[View Documents](#)

18 Download as separate documents. Both documents need to be provided to OSR either by adding them as a DocuSign recipient that receives a copy or via email. OSR will submit the signed Other Support document to the Sponsor and retain the attestation cover letter.

