Account Management Instructions: Remote Monitoring

Version 1 dated August 19, 2022
Create Monitor Account

Note: The monitor’s account must be created for the monitor prior to sending them something to sign in DocuSign.

1. Login to DocuSign at: http://account.docusign.com

2. Select the VCU CFR Part 11 Remote Monitor site:
3. Select the **Admin** menu.

4. Select the **User** settings.

**VCU CFR Part 11**
Account ID: 75478703

**Users**
- Permission Profiles
- Groups
5. Click the **ADD USER** button.

**Users**

Add new users and find, edit, close, or reactivate existing users.

[ADD USER] [DOWNLOAD USERS] [BULK ACTIONS]

6. Enter the monitor’s email address. Click **Next**.
7. Enter the monitor’s Full Name and leave the default language set to English. Click **Next**.

8. **IMPORTANT!** You must create a random access code in order for your monitor to activate their account. Make sure you give this access code to your monitor. Type in the random access code. Click **Next**.
9. Select **Part 11 Outside of VCU Signers** as the permission profile. Do not select a group. Click **Add User**.

![Permission Profile and Groups](image)

**Permission Profile**

Part 11 Outside of VCU Signers

**Groups**
Note: There are no groups available to assign.

![Add User Button](image)
Monitor Instructions

1. A DocuSign email will be sent from dse_NA4@docusign.net to the email address that you gave to the VCU clinical research team. Open the email. Click on **Activate**.

   ![Account Activation](image)

   **DocuSign via DocuSign**

2. Create a password that is at least 12 characters long that you can remember. It must include at least one uppercase letter, one lowercase letter, and one number. Create security question(s). Click on **Activate**.
ACTIVATE YOUR ACCOUNT

Thanks for signing up for a DocuSign Account. Fill out the fields below and click ACTIVATE to get started.

EMAIL
vcu.participant@gmail.com

PASSWORD

CONFIRM PASSWORD

SECURITY QUESTION
-- Select --

ACTIVATE
3. The VCU research team will give you an access code. Type the code here. Click on Validate.

![DocuSign](image)

Please enter the access code to view the document
A request for you to enter a secret access code prior to finishing account creation has been made. You should have received an access code in a separate communication. Please enter the code and validate it in order to proceed.

Access Code

4. You need to create a signature. Click on Create your signature.

![Signature](image)

NOTE: The research team will send you documents to view in order to conduct the scheduled monitoring visit. You will receive a separate email when the documents are ready for you to view.

If you have any questions, please contact the research team sending you the documents.

You will be required to view the documents and mark them as completed.

5. DocuSign will send you a link to the completed documents once all parties have signed.
Loss Management

Procedures to deauthorize lost, stolen, missing or compromised identification codes or passwords

Compromised access code or password (Stolen)

Non-VCU Email Account

1. If an individual suspects their access code or password has been compromised or stolen, this should be reported immediately to your primary study team contact.
2. The study team contact will work with designated Site Administrators and VCU Information Security as appropriate to assess account activity and de-authorize or secure the account.

VCU Email Account

1. Contact the VCU Technology Services IT Support Center at itsc@vcu.edu or (804) 828-2227 to report this immediately.

Access Code Resend (Lost or Missing)

1. Verify identity of the individual.
2. Follow the instructions in the “To resend activation email to a pending new user” section of the Manage Users - Admin Guide: https://support.docusign.com/guides/ndse-admin-guide-users

Password Reset (Lost or Missing)

Non-VCU Email Account

For Site Administrators and Senders with User Create permissions to initiate the password reset:

1. Verify identity of the individual.

Self-service alternative:
https://support.docusign.com/en/articles/How-do-I-reset-my-password#to-reset-your-password
VCU Email Account

1. Visit the Technology Services eID Password page at: https://ts.vcu.edu/askit/eid/eidpassword/

Account Locked

1. Verify identity of the individual.
2. Follow these instructions to assist the individual in troubleshooting a locked account:
   https://support.docusign.com/en/articles/I-am-having-trouble-logging-in

Account Closure/Reactivation

Close Individual Accounts

1. Accounts for users with Site Administrator and Senders with User Create permissions should be closed after separating from the University.
2. VCU and Non-VCU Signers’ user accounts should be closed by study teams upon conclusion of the study.
3. See the “Close or reactivate users” section of the Manage Users - Admin Guide:

Reactivate Individual Accounts

Non-VCU Email Account

1. Accounts for Non-VCU Signers should be reactivated if they become affiliated with the University either as a participant in another study or in an employee role with similar duties. Follow the same rules for creating and sending an access code prior to reactivation.
2. See the “Close or reactivate users” section of the Manage Users - Admin Guide:

VCU Email Account

1. Accounts for users with Site Administrator and Senders with User Create permissions should be reactivated if a separated employee resumes affiliation with the University either as a study participant or in an employee role with similar duties. Follow the same rules for gaining access such as completion of training and for creating and sending an access code prior to reactivation.
2. Accounts for *VCU Signers* should be reactivated if they become affiliated with the University either as a participant in another study or in an employee role with similar duties. Follow the same rules for creating and sending an access code prior to reactivation.