Signature requests and submission process in ERM

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The requestor must first determine which signatories are providing 'wet ink' signatures and/or electronic signatures.

A signatory must have an ERM account to sign an application/form electronically.

If a combination of signature methods is used, **electronic signatures should be sought last** as the application/form becomes locked once an electronic signature request has been made.

Wet ink signatures

Steps

1. The requestor completes the application including the attachment of all relevant documents

2. In the HREA form **Q 4.7**, select wet ink sign as the signature method

    Custom print this page by selecting the **View as PDF** button found under the Actions pane and obtain the required signature. Scan the page and save to your local drive
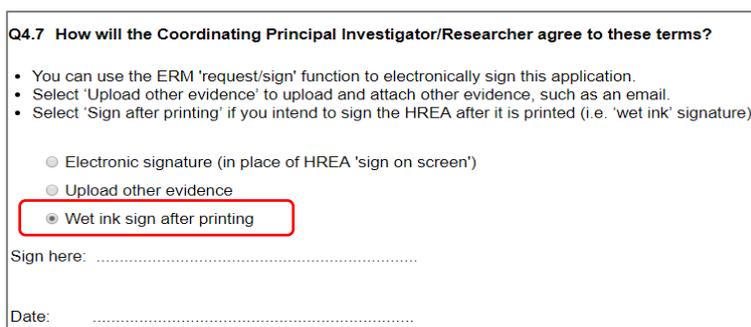
3. The signed page is attached to the HREA in **Q 4.2** under **Other project-related documentation**

    Select **Upload Document** to attach the signed page from your local drive

4. An **Upload Document** button is available when the 'Upload other evidence' signature method e.g. an email copy or letter to indicate agreement is selected

    The uploaded signature document will be displayed with the document and file name and version

5. In a **SSA** form, the Declaration page is printed and signed by the signatory. The page is scanned, saved and uploaded in **Q 7.1 Supporting Documents.**

Electronic signature request

Steps

1. The Requestor selects 'Electronic signature' as the signature method and a button will appear.

    Select **Request Signature**

2. A **Request a Signature** pop up box is displayed. Enter the signatory's ERM email address and select **Request**

3. The signatory will receive an email notification of the signature request with a link to the ERM Work Area.

    Select the **Notifications** or **Signatures** tile to open the request

4. New requests are highlighted and select **View Form** to review the application.

5. Select **Previous / Next** to move through the form or **Navigate** to access an overview of the form and uploaded supporting documents.

   For endorsement of the application, select **Sign**
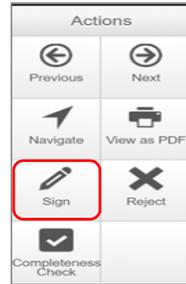
6. A **Sign Form** textbox is displayed.

   The signatory enters their ERM log in details and selects **Sign**

7. The Requestor receives an email notification advising that the signature has been applied, i.e. the form is signed.

Submission process in ERM

Ensure the form is complete with all supporting documents uploaded and signature requests completed.

Steps

1. Navigate to the Actions pane and select the **Submit** action button

2. Following submission, a unique identification code is generated e.g. HREC/74950/VICTEST-2021-257683(v1)

3. The applicant will be advised by the Research Office if the application requires further clarification, edits to documents or additions. The form will be unlocked.

4. If the query requires a new version of a particular document, the original version should be deleted, and the new version uploaded into the form.

5. Select the **Delete** button to delete the original
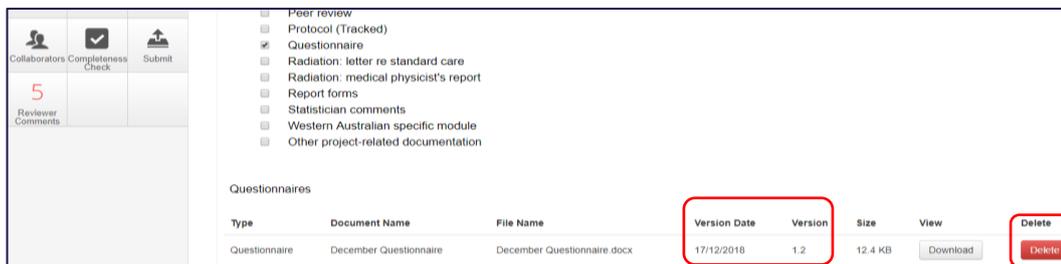
6. Select **Upload Document** to upload the revised (new) version of the document from your local drive with the correct version number and date

7. Check with the Research Office if CPI/PI signatures are required again

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8. Once the revisions/additions have been completed, the form is ready for resubmission

9. Select the **Submit** button to resubmit

To receive this document in another format, phone 0408 274 054, using the National Relay Service 13 36 77 if required, or email Coordinating Office for Clinical Trial Research <multisite.ethics@safercare.vic.gov.au>.

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