



CCH Signatures

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Setting up your secure account with CCH Signatures

1. You will receive 2 emails from noreply@wolterskluwer.com. The first contains the information and link you need to setup an account.

Welcome to **CCH Signatures**, the chosen digital signature & document delivery solution of Wolters Kluwer.

Wolters Kluwer has sent you a document to review via the secure portal.

To sign view this document, you must first set up a secure account with **CCH Signatures**.

Click [here](#) to go to the secure website.

Enter your username and password.

Add your name or initials to be used in your electronic signature.

Create a new secure password.

Username: This email address

Password: A temporary password will be sent in a separate email.

Click on the training guide link for complete instructions on setting up your account and sign your documents.

If you have any concerns about the content of this email, please contact Wolters Kluwer.

Kind regards

The **CCH Signatures** Team

CCH Signatures Support 0800 500 224 NZ-Support@wolterskluwer.com	Training Information Training Guide CCH Signatures Information
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2. The second email contains your temporary password.

Wolters Kluwer has invited you to digitally sign documents using **CCH Signatures**.

This is your temporary password to complete your account setup.

[5Tw3wB3R](#)

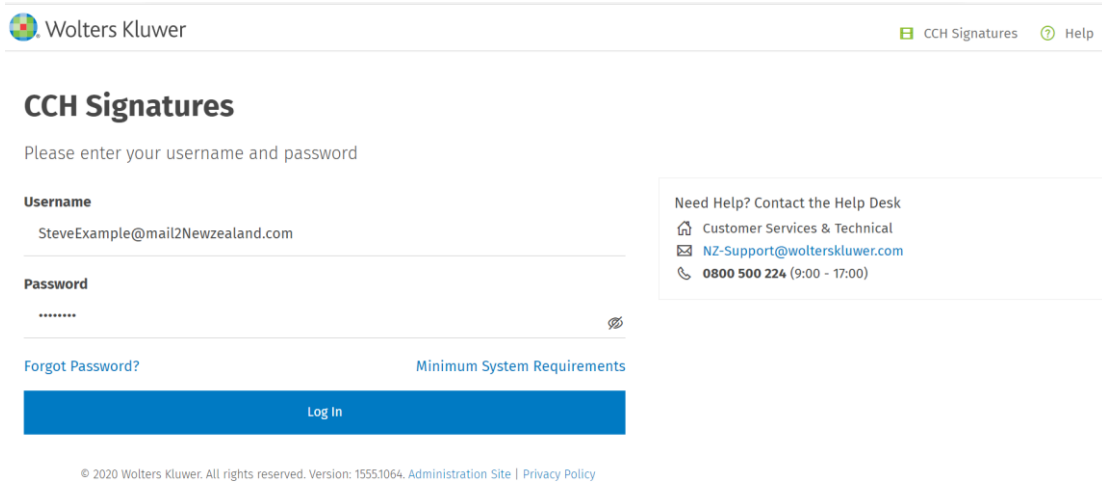
If you have any concerns about the content of this email, please contact Wolters Kluwer.

Kind regards

The **CCH Signatures** Team

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- Click on the link in the first email and then enter your username (your email) and the temporary password you were sent in the second email.



- Enter your first name, initial and last name. These are the details that will be used to construct your electronic signature. You can choose to provide your full name(s), initials or any combination of these.

Enter a secure password for your account along with a hint that may help you to remember the password in future.

First Name Steve	Middle Initial T	Last Name Example
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Time Zone
(UTC+12:00) Auckland, Wellington

Change Password
Passwords must not contain all letters or numbers, and be at least 6 characters and no more than 10 characters long

Old Password
.....

New Password
.....

Confirm Password
.....

Password Hint
Favorite Car

Note: Old password is your temporary password you were sent.

5. Read and agree to the terms and conditions of use. Select **I CONSENT**.

communications suppliers and our business partners) or as required by law. This may include disclosing your personal information to our related bodies corporate and to third party suppliers that are located in Australia, the United States of America, India, Indonesia, Malaysia, Philippines or the Netherlands for processing, storage or support purposes. We will take all reasonable steps to ensure that overseas recipients do not breach privacy obligations relating to your personal information.

We will retain your personal information (and a copy of any documents you execute using the CCH Signatures service) for a period of up to 90 days following your execution of the relevant document(s), before permanently deleting. You must keep your own copies of any documents as required for your retention and record-keeping purposes.

Our Privacy Policy explains: (i) how we store and use, and how you may access and correct your personal information; (ii) how you can lodge a complaint regarding our handling of your personal information; and (iii) how we will handle any complaint. If you would like any further information about our privacy policies or practices, please contact us by post at The Privacy Officer, CCH New Zealand Limited of Level 2, 8-12 The Promenade, Takapuna, Auckland 0622, via email at NZ-Support@wolterskluwer.com or phone at 0800 500 224. By providing your personal information to us, you consent to the collection, use, storage and disclosure of that information as described in our Privacy Policy and this collection notice.

You Are Responsible For Reading And Understanding These Conditions Of Use And Terms Of Service Before Clicking "I Consent to Electronic Packages" To Complete Your User Account Registration In The Portal.

You are verifying that you are able to view, read and understand all of these conditions of use and terms of service; and that you alone are responsible for reading and understanding all these conditions of use and terms of service before you agree to be legally bound by these conditions of use and terms of service. If you have any questions for us about any of these conditions of use and terms of service before you agree to become legally bound by them then you may use the Contact information described above to ask us these questions before you decide to proceed with completing registration of your user account with the portal.

If you disagree with any of the conditions of use and terms of service associated with CCH Signatures for ABC Accounting Portal then click on the "I Do Not Consent" button below.

Clicking on the "I Do Not Consent" button will prevent you from viewing any information and disclosures in CCH Signatures for ABC Accounting Portal because you are refusing to accept the conditions of use and terms of service associated with the portal.

CCH Signatures for ABC Accounting will therefore always send you information and disclosures for the transaction and/or service you requested from CCH Signatures for ABC Accounting on paper using a courier selected by CCH Signatures for ABC Accounting.



If you do not wish to proceed with the account setup after reading the terms click **I DO NOT CONSENT** and contact the sender for a hard copy of the document to sign.

Inviting a New User from your firm to use CCH Signatures.

1. Create a package ([instructions here](#)). Set the type to Standard.
2. Attach a document to your package.
 - a. You might want to use this guide as your attachment or you can find a welcome document on our training and resources page [here](#).
 - b. There is no need to mark up for signature.
3. Send the package to the New User.
4. The new user will receive an email with a link and instructions on how to setup their secure account.

Anyone with an email address that matches your domain (the firm name in your email address) will be setup with a User account and be able to send documents for signature.

Sending a document to be signed

Create a Package

The document you are sending for signature must be completed and saved in a PDF format.

1. Open CCH Signatures and select **CREATE A PACKAGE**
2. Select the Package type (e-Sign, Parallel, Serial, see definitions below)
 - **E-Sign:** 1 person to sign
 - **Parallel Multi Signer:** Multiple people can sign in any order
 - **Serial Multi Signer:** Multiple people must sign in set sequential order
3. Add the recipient email(s). The order they appear on this screen will be the signing order for Serial Signers. Use the blue arrows to change the order.
4. Add a Subject under **General Message**. This will appear in the email the recipient receives but is not the email subject.
5. Add a **Reference Number** (optional). This will appear in the email the recipient receives.
6. Add more information to the **Body** if required. The recipient will see this information when they log into CCH Signatures to sign the document.
7. Add your PDF document(s) to be signed as an Attachment.
8. Select **PREPARE** icon.

Received Sent Archived Deleted **Create Package**
CCH Signatures

Package Type:

To:

General Message:

Ref Number:

Body:

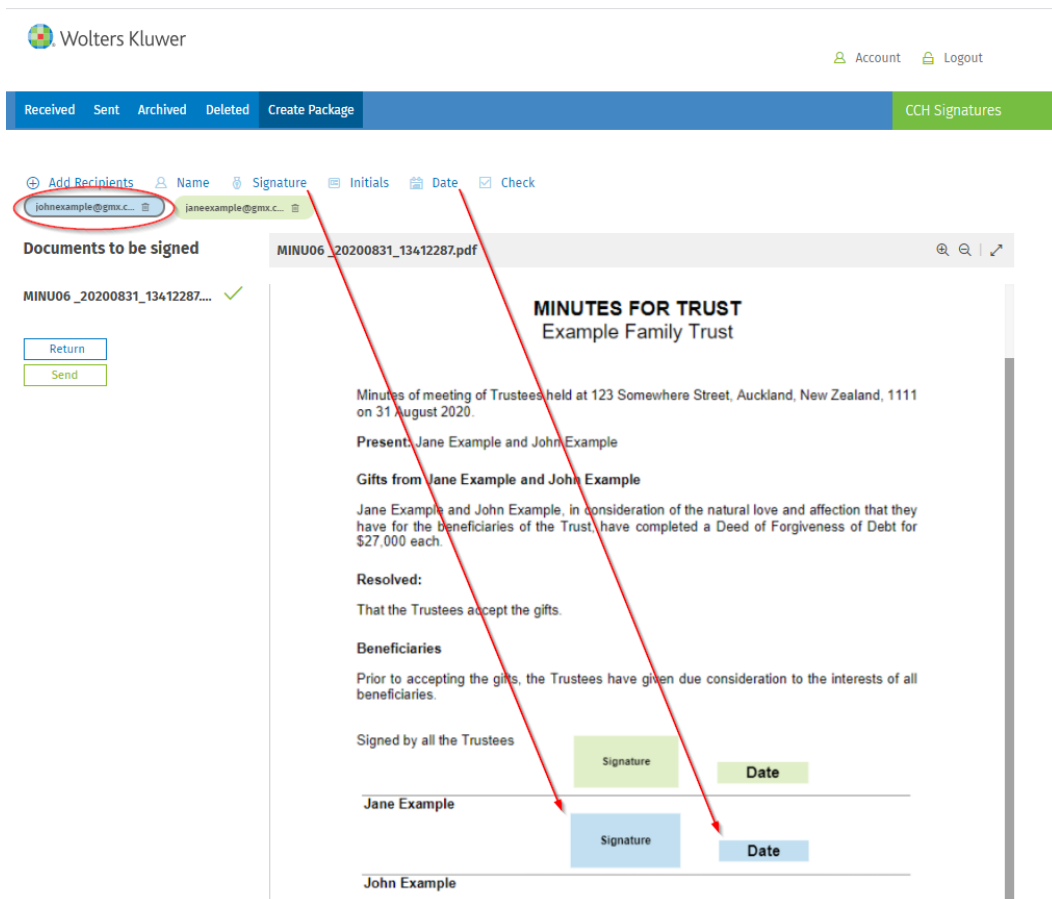
Please sign the attached minutes from our recent meeting.

Add Attachments
Discard Send

Name	Size	Prepare Document	To Do	
MINU06_20200831_13412287.pdf	10K	Prepare	✓	

Prepare the Document

1. The name of the recipient you are working with will be highlighted by a dark outline.
2. Click the information you want the recipient to add out of the following options:
 - Name
 - Signature
 - Initial
 - Date
 - Check box
 - Text (free form text box)
3. Drop it to the location within the PDF document.
4. Select the next recipient and add the information required.

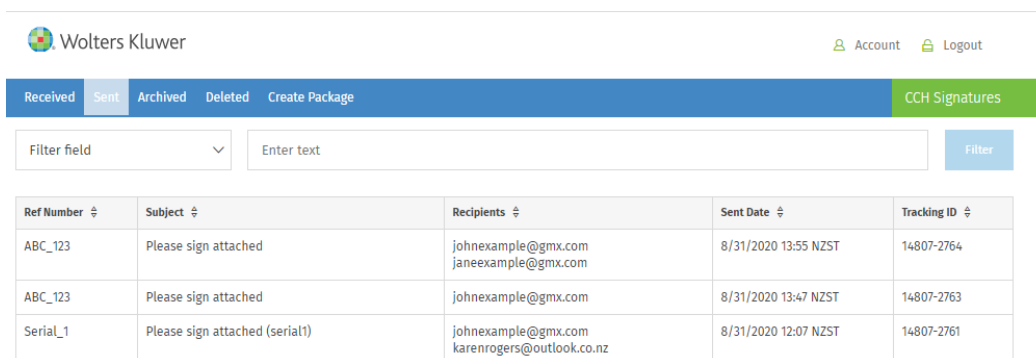


5. If you have more than one document in this Package you will see the document names listed on the left (above Return button). Remember to mark up all documents.
6. Select **Send** to send the Package immediately or **Return** if you wish to save and send the Package later.

The Sent Tab

The Sent tab within the secure portal contains all the Packages that have been sent.

- This can be sorted by date, subject, tracking ID or recipients.
- You can search for a particular Package by using the filter option.
- Check on the progress of the signatories.
- Send reminders to the signatories.
- Delete a Package.
- Track a Package.
- Forward a Package (does not allow any additional signatures).



Ref Number	Subject	Recipients	Sent Date	Tracking ID
ABC_123	Please sign attached	johnexample@gmx.com janeexample@gmx.com	8/31/2020 13:55 NZST	14807-2764
ABC_123	Please sign attached	johnexample@gmx.com	8/31/2020 13:47 NZST	14807-2763
Serial_1	Please sign attached (serial1)	johnexample@gmx.com karenrogers@outlook.co.nz	8/31/2020 12:07 NZST	14807-2761

Tracking

When the Package is opened, viewed, signed or rejected, the sender will receive an email notification. If you do not wish to receive these, please contact our Support Team.

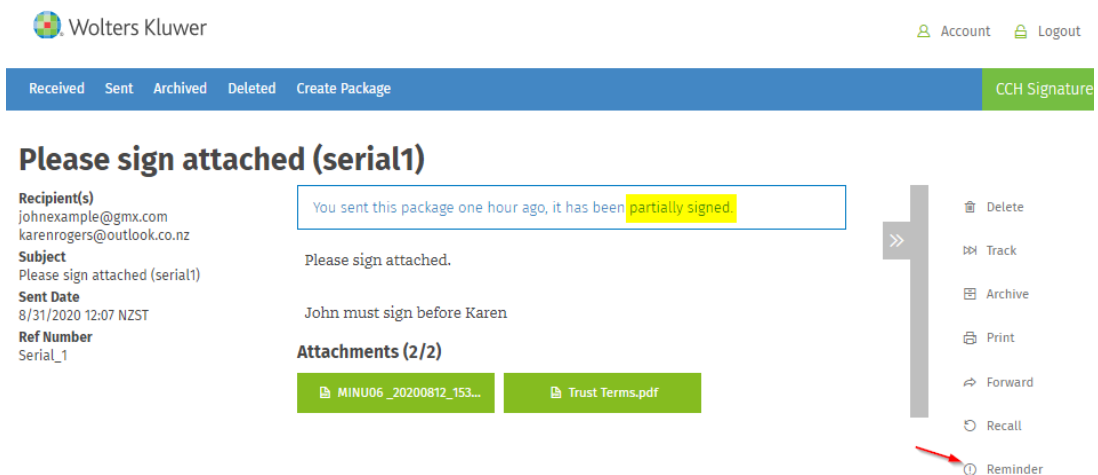
1. Highlight any document on the **Sent Tab** and select **Track** to see which of the recipients have viewed, signed or rejected the document.



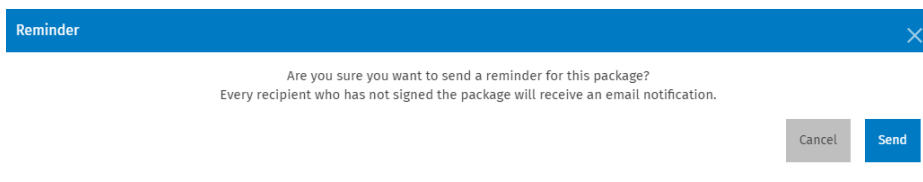
Remind

If one of the recipient has not signed the Package you can send a reminder.

1. Select **Reminder**



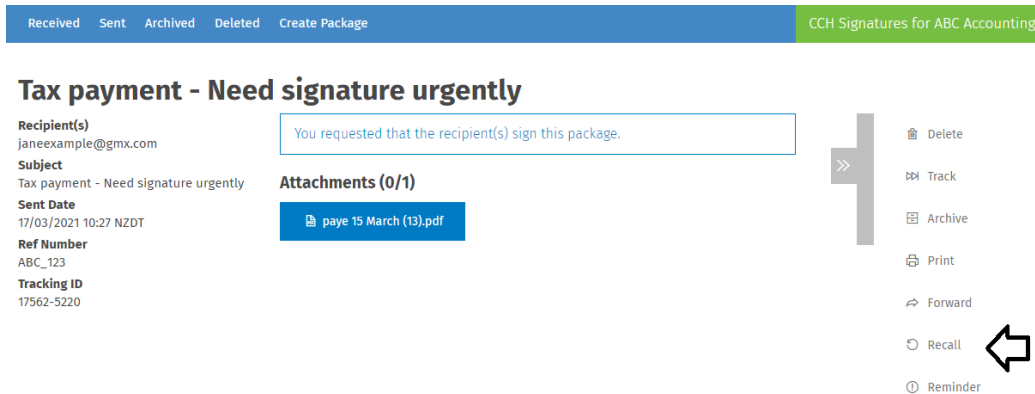
2. The reminder will only go to the signatories that have not signed the document.



Recall

You can recall a Package after it has been sent.

1. Under the **Sent** tab, click on the item, and select **Recall** on the right-hand side options column.



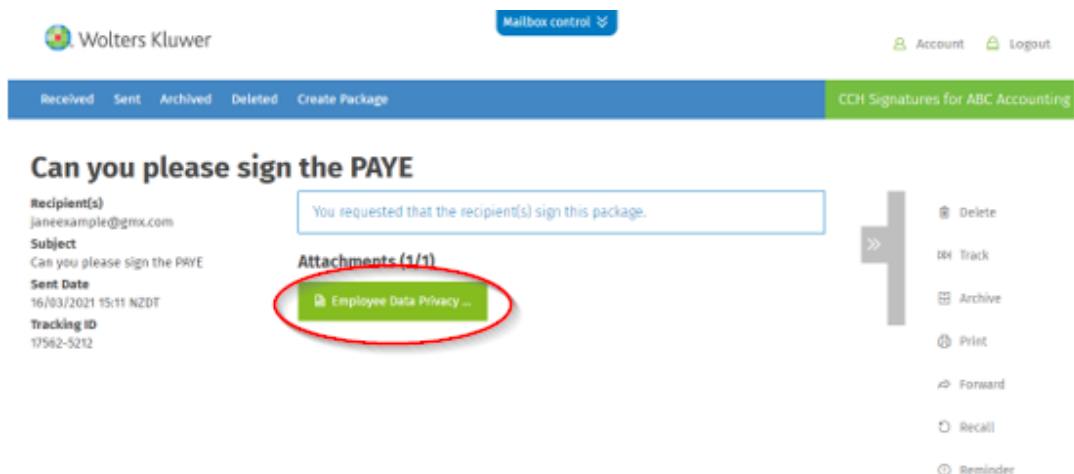
The screenshot shows the CCH Signatures interface for a package titled "Tax payment - Need signature urgently". The package details include the recipient "janeexample@gmx.com", subject "Tax payment - Need signature urgently", sent date "17/03/2021 10:27 NZDT", reference number "ABC_123", and tracking ID "17562-5220". A message box states "You requested that the recipient(s) sign this package." and there is one attachment named "paye 15 March (13).pdf". On the right-hand side, a vertical menu contains options: Delete, Track, Archive, Print, Forward, Recall (highlighted with a white arrow), and Reminder.

Download

When a document has been signed by all recipients it should be downloaded and added to your regular document storage.

Documents are held in CCH Signatures for a maximum of 90 days before they are deleted.

1. Click on the document to download.



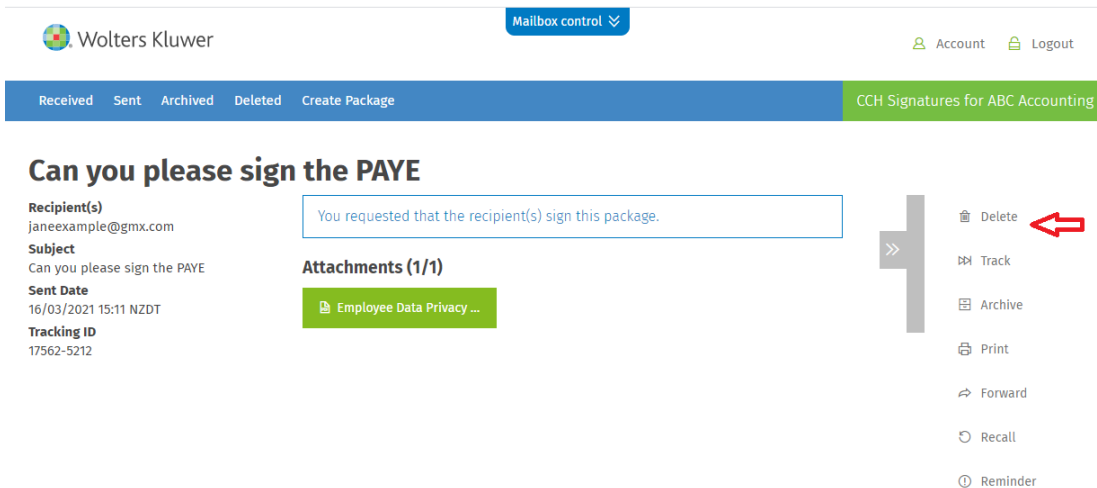
The screenshot shows the CCH Signatures interface for a package titled "Can you please sign the PAYE". The package details include the recipient "janeexample@gmx.com", subject "Can you please sign the PAYE", sent date "16/03/2021 15:11 NZDT", and tracking ID "17562-5212". A message box states "You requested that the recipient(s) sign this package." and there is one attachment named "Employee Data Privacy ...", which is circled in red. On the right-hand side, a vertical menu contains options: Delete, Track, Archive, Print, Forward, Recall, and Reminder.

2. After the document is completed and downloaded you may want to manually delete it from CCH Signatures to ensure your inbox is well organized.

Delete

You can delete a Package.

1. Select a Package that you wish to delete
2. Under the actions panel, select **Delete**



Wolters Kluwer Mailbox control Account Logout

Received Sent Archived Deleted Create Package CCH Signatures for ABC Accounting

Can you please sign the PAYE

Recipient(s)
janeexample@gmx.com

Subject
Can you please sign the PAYE

Sent Date
16/03/2021 15:11 NZDT

Tracking ID
17562-5212

You requested that the recipient(s) sign this package.

Attachments (1/1)
Employee Data Privacy ...

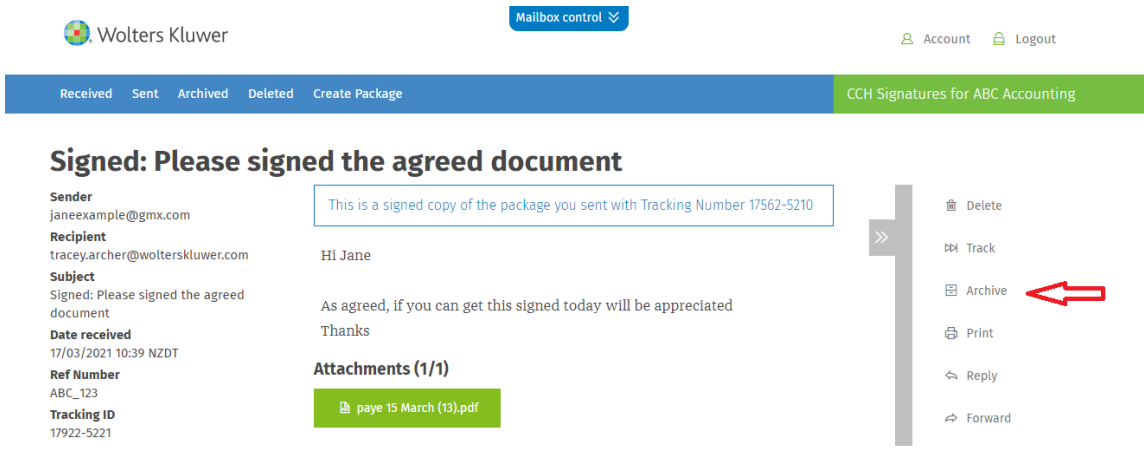
- Delete
- Track
- Archive
- Print
- Forward
- Recall
- Reminder

3. A confirmation screen will pop up, select **Delete**.

Archive

You may choose to archive a completed document instead of deleting it

1. Select the Package you wish to archive



Wolters Kluwer Mailbox control Account Logout

Received Sent Archived Deleted Create Package CCH Signatures for ABC Accounting

Signed: Please signed the agreed document

Sender
janeexample@gmx.com

Recipient
tracey.archer@wolterskluwer.com

Subject
Signed: Please signed the agreed document

Date received
17/03/2021 10:39 NZDT

Ref Number
ABC_123

Tracking ID
17922-5221

This is a signed copy of the package you sent with Tracking Number 17562-5210

Hi Jane

As agreed, if you can get this signed today will be appreciated

Thanks

Attachments (1/1)
paye 15 March (13).pdf

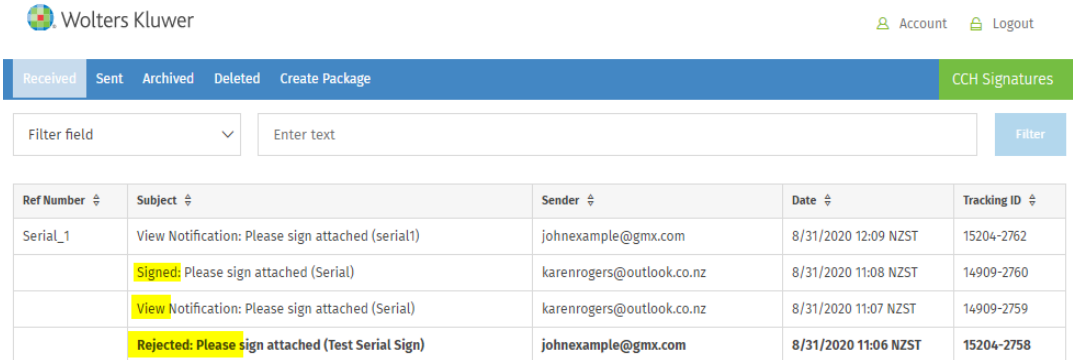
- Delete
- Track
- Archive
- Print
- Reply
- Forward

2. A confirmation pop up screen will appear, select **Archive**
3. Documents will reside there for the 90-day period

Received Tab

The Receive tab contains all the notifications relating to your documents.

Documents could have the status of viewed, signed, or rejected.



The screenshot shows the CCH Signatures interface. At the top left is the Wolters Kluwer logo. At the top right are links for 'Account' and 'Logout'. Below the header is a navigation bar with tabs: 'Received' (selected), 'Sent', 'Archived', 'Deleted', and 'Create Package'. To the right of the navigation bar is a green box labeled 'CCH Signatures'. Below the navigation bar is a search filter area with a dropdown menu labeled 'Filter field', an input field labeled 'Enter text', and a 'Filter' button. Below the search area is a table with the following data:

Ref Number	Subject	Sender	Date	Tracking ID
Serial_1	View Notification: Please sign attached (serial1)	johnexample@gmx.com	8/31/2020 12:09 NZST	15204-2762
	Signed: Please sign attached (Serial)	karenrogers@outlook.co.nz	8/31/2020 11:08 NZST	14909-2760
	View Notification: Please sign attached (Serial)	karenrogers@outlook.co.nz	8/31/2020 11:07 NZST	14909-2759
	Rejected: Please sign attached (Test Serial Sign)	johnexample@gmx.com	8/31/2020 11:06 NZST	15204-2758