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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

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<th>Training Information</th>
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<tr>
<td>0800 500 224</td>
<td>Training Guide</td>
</tr>
<tr>
<td><a href="mailto:NZ-Support@wolterskluwer.com">NZ-Support@wolterskluwer.com</a></td>
<td>CCH Signatures Information</td>
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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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wolterskluwer.co.nz/CCHSignatures/
3. 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.

4. 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.

Note: Old password is your temporary password you were sent.
5. Read and agree to the terms and conditions of use. Select **I CONSENT**.

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.
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).
**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.

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.

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

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

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.