



## CCH Signatures with CCH Entities

### What does the CCH Signature Interface do?

The CCH Signatures interface is an additional, optional, module that can be activated on request.

#### **Users can:**

- Send documents for electronic signature via the CCH Signatures portal directly from CCH Entities
- Import signed documents back from the CCH Signatures portal
- Track and report on progress of documents during the signature process

#### **Envelopes can;**

- Contain multiple documents
- Be sent to multiple signatories
- Contain documents that can be signed by multiple people in any order (parallel)
- Contain documents that can be signed by multiple people in a specific order (serial)

#### **Signers can;**

- Sign a document electronically
- Download a copy of the signed document
- Reject a document

### Turning on the CCH Signatures Interface

1. Let your account manager know you would like to use the interface
2. You will be asked to make some decisions about the format of the signer site and email templates
3. You will be told when the setup is complete

## Creating a document for electronic signature

To create a document using one of the CCH Entities templates;

1. Open your trust or company record.
2. Go to Documents.
3. Select **NEW**.
4. Select **CREATE NEW**.
5. Select the required template.
6. Complete the required information.
7. Ensure Save in Document Register is ticked.
8. Select **CREATE**.

**Note:** Not all documents are suitable for electronic signatures. You will see a note here on whether or not this document can be signed electronically.

Create Document for Example Family Trust Step 3 of 3 ?

Save in Document Register

Document Format: Microsoft Office Word (DOCX) ▼

This document cannot be signed electronically

Cancel Previous Create

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### Generally suitable for electronic signatures

Letters  
Minutes  
Resolution  
Checklists  
Notices  
Forms  
Certificates

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### Generally unsuitable for electronic signatures

Trust Deeds  
Wills  
Powers of Attorney  
Banking and financial records

You can find a full guide which documents should be signed electronically on our training resources page.

## Uploading a document for electronic signature

To upload a document;

1. Open your trust or company record.
2. Go to Documents.
3. Select **NEW**.
4. Select **UPLOAD DOCUMENT**.
5. Select the required document. Ideally this should be a PDF but a Word document will be converted during the signature process if necessary.
6. Tick eSign Enabled. If you forget this you can update it by selecting **MODIFY** in the Document Screen.

### Upload Trust Document ?

Document Type

eSign Enabled

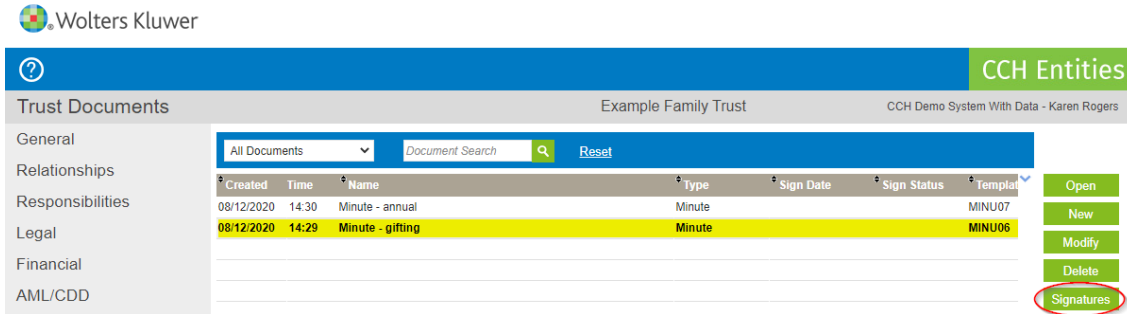
Document

Creation Date

Name

## Preparing and sending a document for signature

1. Highlight the first document to be signed and select **SIGNATURES**. You can add more unsigned documents to the envelope in the next step.



The screenshot shows the Wolters Kluwer CCH Entities interface. The top navigation bar includes the logo and 'CCH Entities'. Below it, the page title is 'Trust Documents' for 'Example Family Trust'. A sidebar on the left lists categories: General, Relationships, Responsibilities, Legal, Financial, and AML/CDD. The main area displays a table of documents with columns for Created, Time, Name, Type, Sign Date, Sign Status, and Template. The second row is highlighted in yellow. To the right of the table are buttons for Open, New, Modify, Delete, and Signatures. The Signatures button is circled in red.

Created	Time	Name	Type	Sign Date	Sign Status	Templat
08/12/2020	14:30	Minute - annual	Minute			MINU07
08/12/2020	14:29	Minute - gifting	Minute			MINU06

2. Select **eSign via CCH Signatures**.

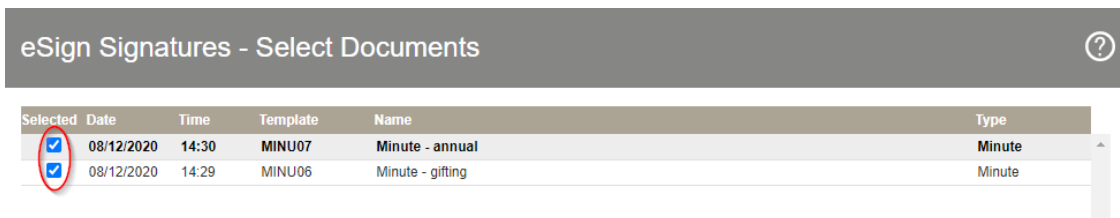


The screenshot shows a dialog box with two buttons: 'Add Sign Date' and 'eSign via CCH Signatures'. The 'eSign via CCH Signatures' button is circled in red.

Cancel

Note: you still have the option to manually add a signed date for documents that are not signed electronically.

3. If there are other unsigned documents in the Documents Screen you can add them to this envelope in the next screen. Each envelope can contain multiple documents and multiple signatures.



The screenshot shows the 'eSign Signatures - Select Documents' screen. It features a table with columns for Selected, Date, Time, Template, Name, and Type. The first two rows are selected, indicated by blue checkmarks in the 'Selected' column. The 'Selected' column is circled in red.

Selected	Date	Time	Template	Name	Type
<input checked="" type="checkbox"/>	08/12/2020	14:30	MINU07	Minute - annual	Minute
<input checked="" type="checkbox"/>	08/12/2020	14:29	MINU06	Minute - gifting	Minute

- Select the people who need to sign this document.

**Note:** People must be added to the Relationship Screen to appear in this list.

eSign Signatures - Select Recipients ?

Selected	Name	Relationship	Email Address
<input checked="" type="checkbox"/>	Bob Example	Beneficiary/Settlor/Trustee	BobExample@mail2Newzealand.com
<input checked="" type="checkbox"/>	Janice Example	Beneficiary/Settlor/Trustee	JaniceExample@mail2Newzealand.com

- Set the signing order, if required for multi signing.

Recipients

	Name	Relationship	Email Address
<input type="button" value="Up"/>	Bob Example	Beneficiary/Settlor/Trustee	BobExample@mail2Newzealand.com
<input type="button" value="Down"/>	Janice Example	Beneficiary/Settlor/Trustee	JaniceExample@mail2Newzealand.com

- Complete the Envelope Details Screen.

eSign Signatures - Envelope Details ?

Recipients

	Name	Relationship	Email Address
<input type="button" value="Up"/>	Bob Example	Beneficiary/Settlor/Trustee	BobExample@mail2Newzealand.com
<input type="button" value="Down"/>	Janice Example	Beneficiary/Settlor/Trustee	JaniceExample@mail2Newzealand.com

General Message: Annual and Gifting Minutes for Example Family Trust

Ref Number: EXM123

Package Type: Parallel Multi-Signer

Package Information: Please sign the annual and gifting minutes for the Example Family Trust.  
This document is being signed by Bob and Janice Example. You may sign in any order.  
If you have any questions please contact Dave on 021 222 333 444

**General Message:** This information will appear in the email your customer receives and in the CCH Signatures Portal

**Reference:** This information will appear in the email your customer receives and in the CCH Signatures Portal

**Package Type:** Single sign is used for 1 person signing  
Multi sign any order is used for 2 or more people signing in any order  
Multi sign set order is used for 2 or more people signing in a specified order

Package Info: This information will appear in the CCH Signatures Portal when the recipient is signing  
This is a good opportunity to provide more information to the signer

Select **Prepare**.

7. Each signatory is assigned a color to markup the document.

Select the item you would like them to add to this document, eg Name, Signature, Initials or date and drag into position.

Select the next signatory and add their fields to the doc. They will show in a different color.

If you have more than 1 document select the next document to mark up (see highlight).

Once completed, select **Send**.

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⊕ Add Recipients ⊕ Name ⊕ Signature ⊕ Initials ⊕ Date ⊕ Check ⊕ Text

jane@example.com bobexample@mail2...

Documents to be signed DOC\_54354.PDF

DOC\_543546.PDF ✓  
DOC\_543547.PDF ✓

Return  
Save  
Send

NOTED that:

1. The company proposes to exercise an option to redeem shares on the terms set out in Part A of the schedule (the proposal).
2. The following documents were circulated to all the directors:
  - a) the agreement of all entitled persons to the proposal, and
  - b) certain information and documents relating to the solvency of the company referred to in Part B of the schedule.

RESOLVED that:

1. The company exercise the option to redeem shares in accordance with the proposal.
2. The board is satisfied on reasonable grounds that the company will immediately after the redemption satisfy the solvency test in accordance with s 109 of the Companies Act 1993.
3. The grounds for the board's opinion as to the solvency of the company are:

DATED

SIGNATURES OF ALL THE DIRECTORS

Signature Date

Janice Example (Director)

Signature Date

Bob Example (Director)

## Tracking a document

1. When the document is sent it will show as Sent in the Document Screen of the Trust and in the Document Signatures Report.

Created	Time	Name	Type	Sign Date	Sign Status	Template
22/06/2021	10:34	CRESFI07_20210621_14155456.DOCX	Resolution		Sent	
22/06/2021	10:34	CRESRD13_20210621_14161892.DOCX	Resolution		Sent	
16/06/2021	09:36	CRESAP12_20210615_10201750.DOCX			Sent	
16/06/2021	09:34	CRESAN03b_20210615_13040866.DOCX			Sent	
18/05/2021	14:16	Will - individuals as executors (2020)	Will			WILL01 G
14/09/2020	15:34	Minute - security of advances by trusts to a related persons	Minute			MINU08
14/09/2020	15:26	Minute - annual	Minute			MINU07

Status	Trust Name	Document Name	eSign Date	Days Left	Saved to Trust
Sent	Example Family Trust	CRESFI07_20210621_14155456.DOCX	22/06/2021 10:35:53	90 Days	<input type="checkbox"/>
Sent	Example Family Trust	CRESAP12_20210615_10201750.DOCX	22/06/2021 10:32:31	90 Days	<input type="checkbox"/>
Sent	Example Family Trust	CRESAN03b_20210615_13040866.DOCX	16/06/2021 09:34:39	84 Days	<input type="checkbox"/>
Received	Anderson Trust	CCH_Signatures_CCH_Entities_Content_Guide (1).pdf	08/06/2021 21:13:02	76 Days	<input type="checkbox"/>

The status will change to view once ALL parties have viewed.

The status will change to signed once ALL parties have signed.

The status will change to completed once the signed document has been downloaded.

**Once all parties have signed you must download the signed copy back into CCH Entities.**

2. Under the Signatures menu in the Document Screen and on the Document Signatures Report there is an option to Track the document.

Add Sign Date

eSign via CCH Signatures

Download Signed Document

Track Document

Cancel



eSign Tracking Package 14902-4238 ?

Recipients  Signers   
Sent

Recipient	<input type="text" value="bobexample@mail2newzealand.com"/>	Package Views	<input type="text" value="1"/>
Received	<input type="text" value="08/12/2020 15:24"/>		
Notified	<input type="text" value="08/12/2020 15:24"/>	Attachments	<input type="text" value="DOC_18313.PDF (1 views)"/>
Viewed	<input type="text" value="08/12/2020 15:30"/>		
Signed	<input type="text"/>		
Status	<input type="text" value="Viewed"/>		

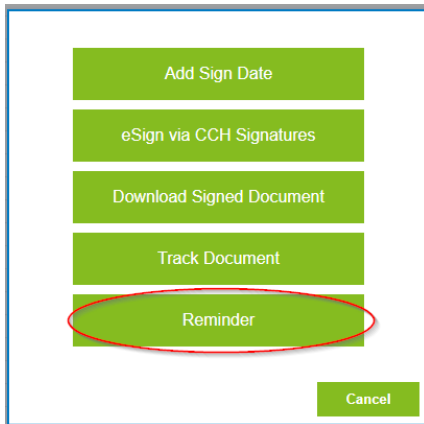
Recipient	<input type="text" value="janiceexample@mail2newzealand.com"/>	Package Views	<input type="text" value="0"/>
Received	<input type="text" value="08/12/2020 15:24"/>		
Notified	<input type="text" value="08/12/2020 15:24"/>	Attachments	<input type="text" value="DOC_18313.PDF (0 views)"/>
Viewed	<input type="text"/>		
Signed	<input type="text"/>		
Status	<input type="text" value="Received"/>		

This shows you who has received, viewed and signed the document.

## Sending a reminder email

Once a document has been sent you can send a reminder from the Document screen within the Trust or Company or from the Electronic Signatures Report.

1. Select Signatures.
2. Select Reminder.
3. A reminder email is sent to any remaining signatories of the document.
4. You can repeat the reminder process as many times as necessary.



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Dashboard Reports Setup About Logout ? CCH Entities

eSign Documents CCH Demo System With Data - Karen Rogers

All Statuses  Between  and  Apply Reset

Status	Trust Name	Document Name	eSign Date	Days Left	Saved to Trust	
Received	Example Family Trust	Minute - gifting	15/12/2020 10:50:49	90 Days	<input type="checkbox"/>	Download Signed Document
Signed	CCH TRAINING TRUST	Minute - draft format (Ready for download)	17/09/2020 15:56:21	1 Days	<input checked="" type="checkbox"/>	Track
Received	CCH TRAINING TRUST	Minute - draft format	17/09/2020 15:47:49	1 Days	<input type="checkbox"/>	Reminder
Signed	COOPER FAMILY TRUST	Minute - draft format (Ready for download)	17/09/2020 12:16:59	1 Days	<input checked="" type="checkbox"/>	
	CCH TRAINING TRUST	Minute - minute builder	17/09/2020 11:25:13	1 Days	<input type="checkbox"/>	
OK	CCH TRAINING TRUST	Deed of Appointment of Additional Trustee - no retirement	27/08/2020 14:46:53	Expired	<input type="checkbox"/>	
Viewed	CCH TRAINING TRUST	Deed of Appointment of Additional Trustee - no retirement	25/08/2020 11:17:14	Expired	<input type="checkbox"/>	
completed	PEREIRA FAMILY TRUST	Resolution of Trustees - first resolutions	20/03/2018 10:30:17	Expired	<input type="checkbox"/>	
completed	MASTERS FAMILY TRUST	Deed of Sale and Purchase and Acknowledgement of Debt	20/02/2018 12:37:28	Expired	<input checked="" type="checkbox"/>	
completed	PEREIRA FAMILY TRUST	Deed of Sale and Purchase and Acknowledgement of Debt	20/02/2018 11:56:32	Expired	<input checked="" type="checkbox"/>	
delivered	ROGERS FAMILY TRUST	Deed of Sale and Purchase and Acknowledgement of Debt	20/02/2018 11:45:13	Expired	<input type="checkbox"/>	
	ROGERS FAMILY TRUST	Resolution of Trustees - recipient trust, resettlement, no novation, specific property	10/12/2017 00:00:00	Expired	<input type="checkbox"/>	

## Saving a signed document

After all parties have signed the document you will need to download the signed copy. Signed documents are retained for a **maximum of 90 days** in CCH Signatures after which time they are deleted.

In the document screen the status will show as Signed and the name has (Ready for Download).

The screenshot shows the CCH Entities interface for 'Example Family Trust'. The document 'Minute - gifting (Ready for download)' is listed with a status of 'Signed' and '90 Days' remaining. The interface includes a search bar, a table of documents, and action buttons like 'Open', 'New', 'Modify', 'Delete', 'Signatures', and 'Archive'.

Created	Time	Name	Type	Sign Date	Sign Status	Templat
08/12/2020	15:23	Minute - gifting (Ready for download)	Minute		Signed	MINU06

In the Document Signatures Report you can also see how many days you have left to retrieve this document. The tick box will show those that have already be downloaded.

The screenshot shows the 'eSign Documents' report in CCH Entities. It displays a table of documents with columns for Status, Trust Name, Document Name, e Sign Date, Days Left, and Saved to Trust. A 'Download Signed Document' button is highlighted with a red circle.

Status	Trust Name	Document Name	e Sign Date	Days Left	Saved to Trust
Signed	Example Family Trust	Minute - gifting (Ready for download)	08/12/2020 15:24:26	90 Days	<input type="checkbox"/>
Signed	CCH TRAINING TRUST	Minute - draft format (Ready for download)	17/09/2020 15:56:21	8 Days	<input checked="" type="checkbox"/>
Received	CCH TRAINING TRUST	Minute - draft format	17/09/2020 15:47:49	8 Days	<input type="checkbox"/>
Signed	COOPER FAMILY TRUST	Minute - draft format (Ready for download)	17/09/2020 12:16:59	8 Days	<input checked="" type="checkbox"/>
Received	CCH TRAINING TRUST	Minute - minute builder	17/09/2020 11:25:13	8 Days	<input type="checkbox"/>
OK	CCH TRAINING TRUST	Deed of Appointment of Additional Trustee - no retirement	27/08/2020 14:46:53	Expired	<input type="checkbox"/>
Viewed	CCH TRAINING TRUST	Deed of Appointment of Additional Trustee - no retirement	25/08/2020 11:17:14	Expired	<input type="checkbox"/>
completed	PEREIRA FAMILY TRUST	Resolution of Trustees - first resolutions	20/03/2018 10:30:17	Expired	<input type="checkbox"/>
completed	MASTERS FAMILY TRUST	Deed of Sale and Purchase and Acknowledgement of Debt	20/02/2018 12:37:28	Expired	<input checked="" type="checkbox"/>
completed	PEREIRA FAMILY TRUST	Deed of Sale and Purchase and Acknowledgement of Debt	20/02/2018 11:56:32	Expired	<input checked="" type="checkbox"/>
delivered	ROGERS FAMILY TRUST	Deed of Sale and Purchase and Acknowledgement of Debt	20/02/2018 11:45:13	Expired	<input type="checkbox"/>

To save the document either select **Download Signed Document** on the Document Signatures Report or under the Signatures Menu in the Document Screen.