Wolters Kluwer

CCH Signatures

CCH Signatures with CCH Entities

What does the CCH Signature Interface do?

The CCH Signatures interface is and 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

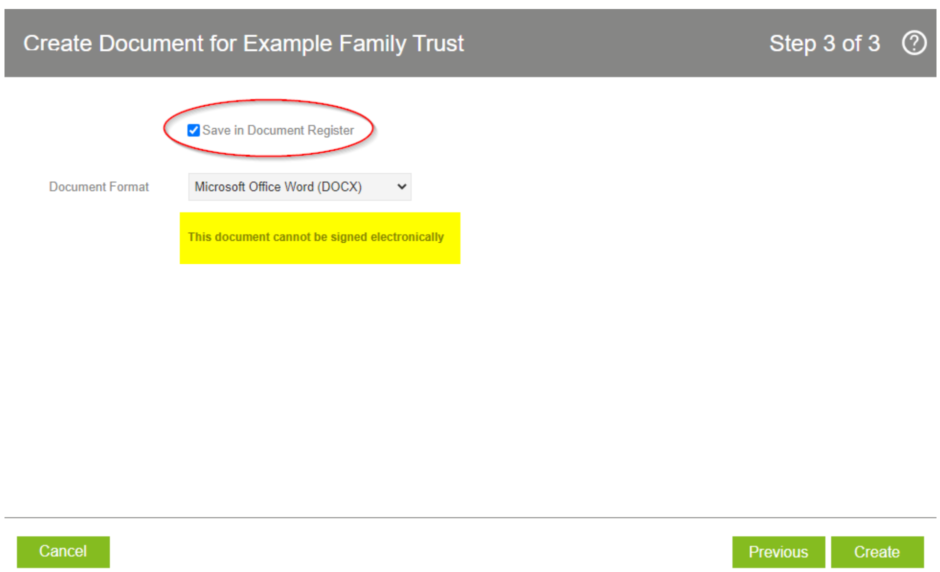
1. Let your account manager know you would like to use the interface
2. You will be asked to make some decisions about the format of the signer site and email templates
3. You will be told when the setup is complete

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.



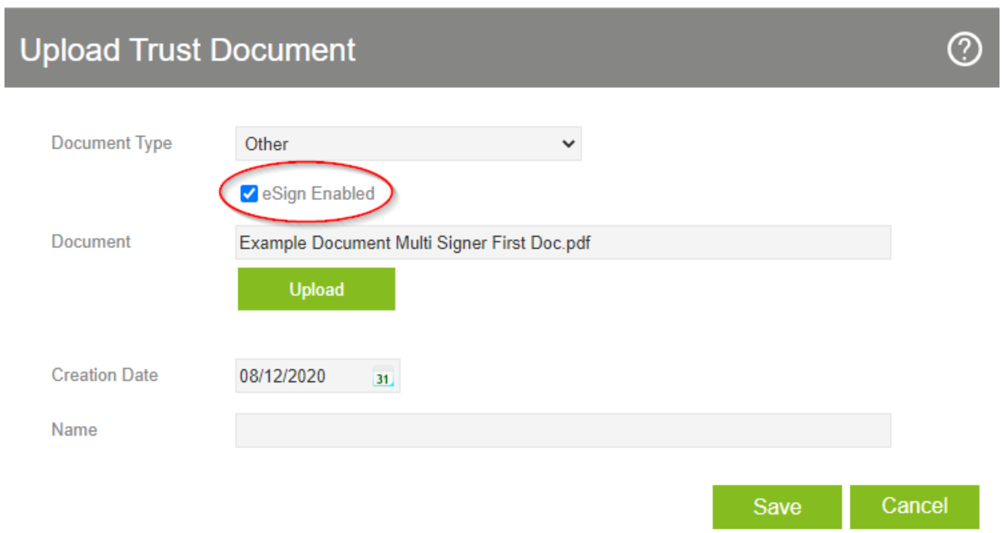
Generally suitable for electronic signatures	Generally unsuitable for electronic signatures
Letters	Trust Deeds
Minutes	Wills
Resolution	Powers of Attorney
Checklists	Banking and financial records
Notices	
Forms	
Certificates	

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

Uploading a document for electronic signature

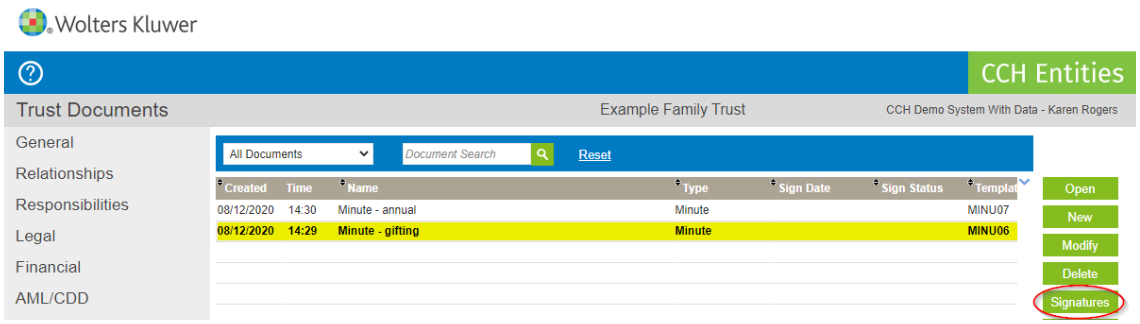
To upload a document;

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.



Preparing and sending a document for signature

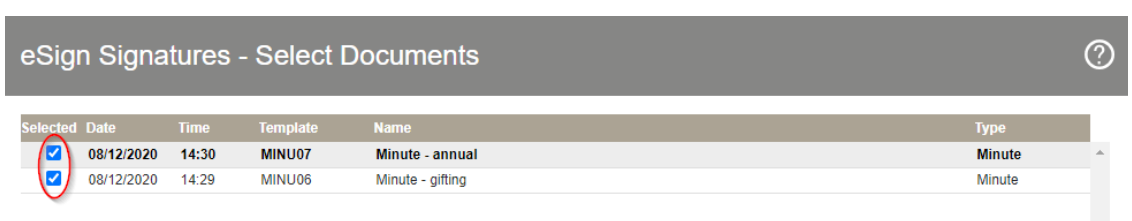
1. Highlight the first document to be signed and select **SIGNATURES.** You can add more unsigned documents to the envelope in the next step.



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

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.

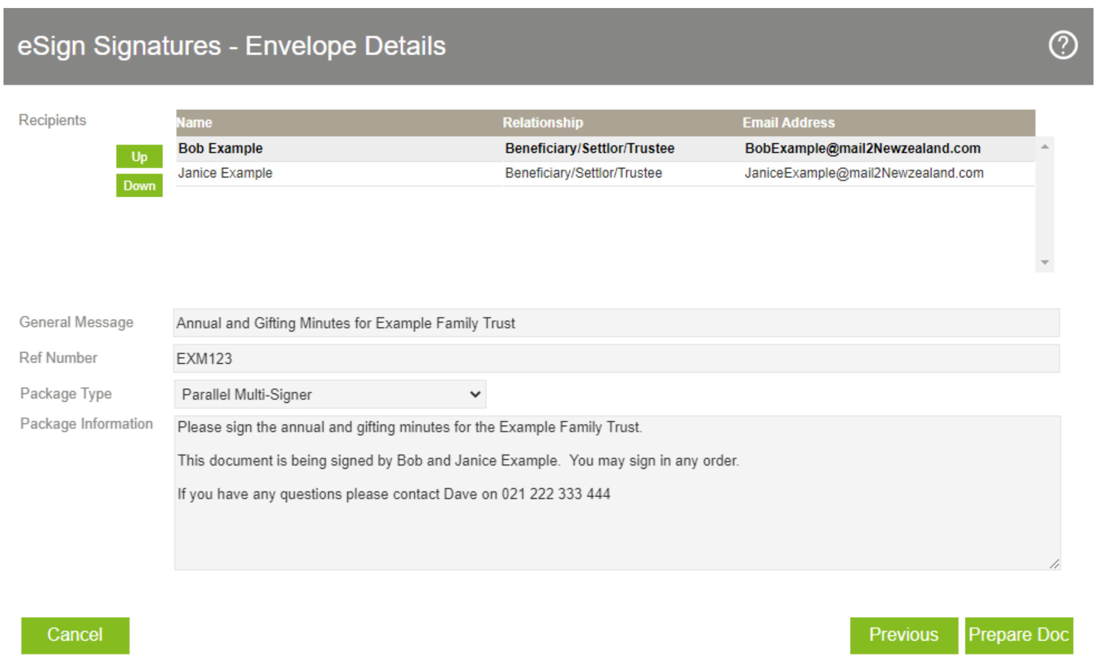


4. Select the people who need to sign this document.

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

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

6. Complete the Envelope Details Screen.



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.**

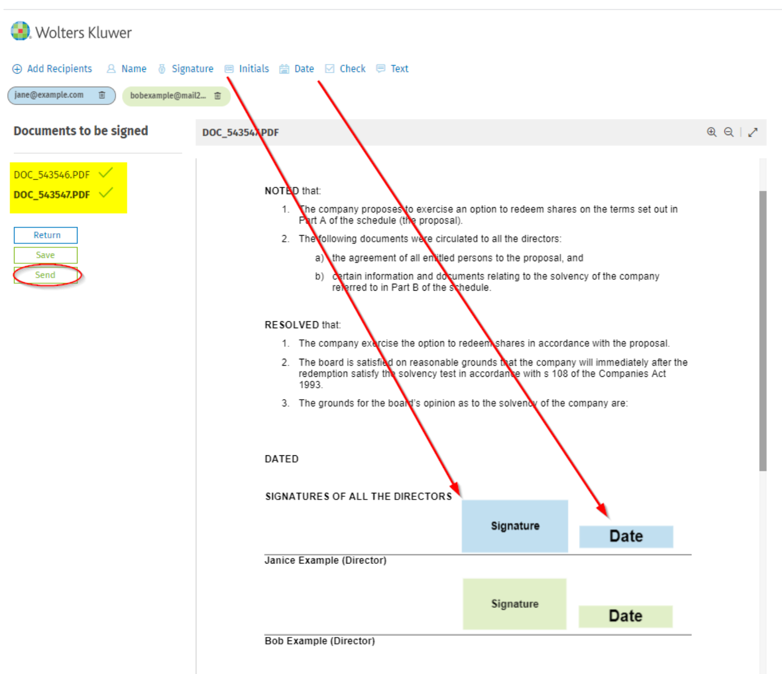
7. Each signatory is assigned a color to markup the document.

   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.

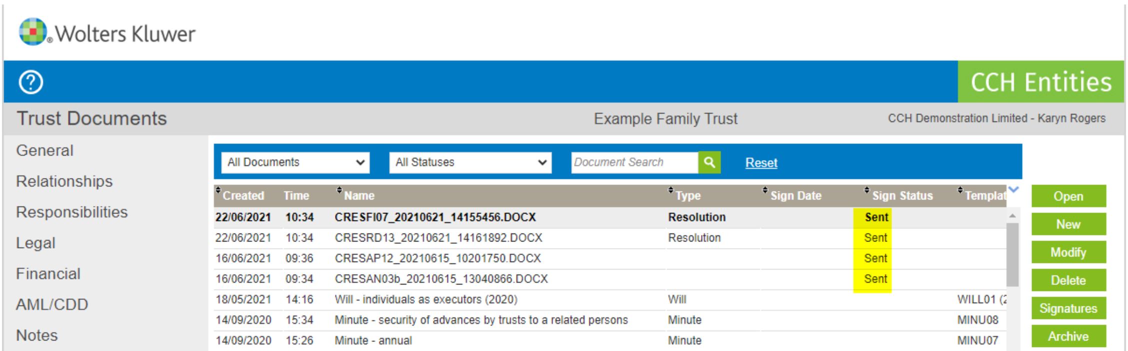
   If you have more than 1 document select the next document to mark up (see highlight).

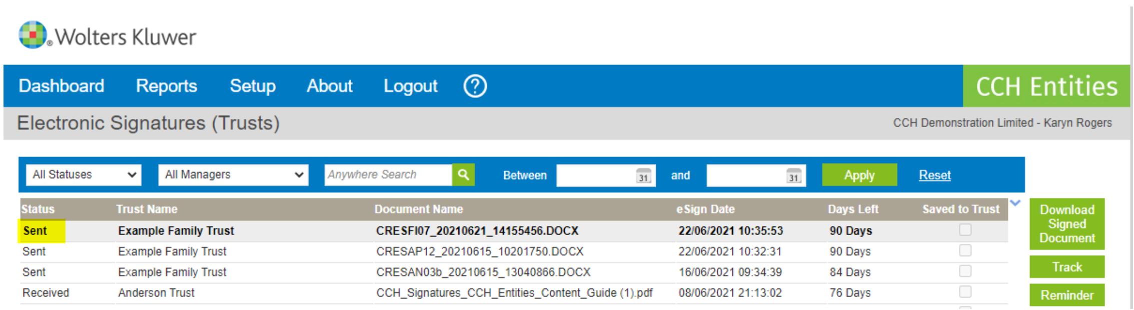
   Once completed, select **Send**.



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.





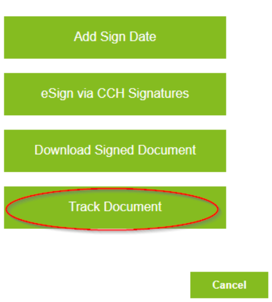
The status will change to view once ALL parties have viewed.

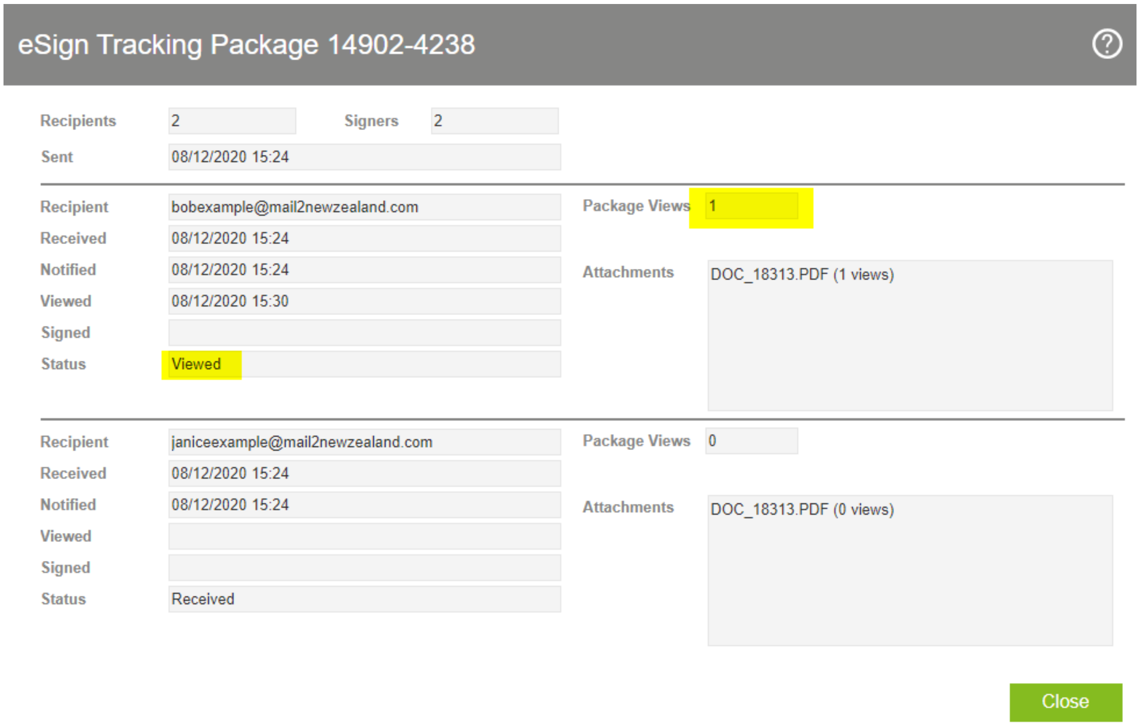
The status will change to signed once ALL parties have signed.

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.





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

Sending a reminder email

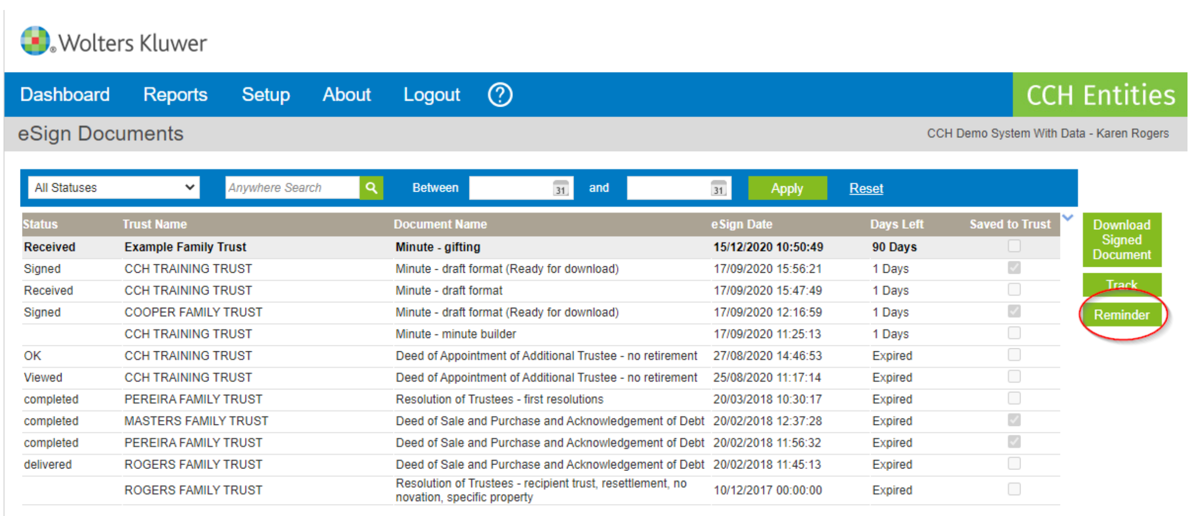
Once a document has been sent you can send a reminder from the Document screen within the Trust or Company or from the Electronic Signatures Report.

1. Select Signatures.

2. Select Reminder.

3. A reminder email is sent to any remaining signatories of the document.

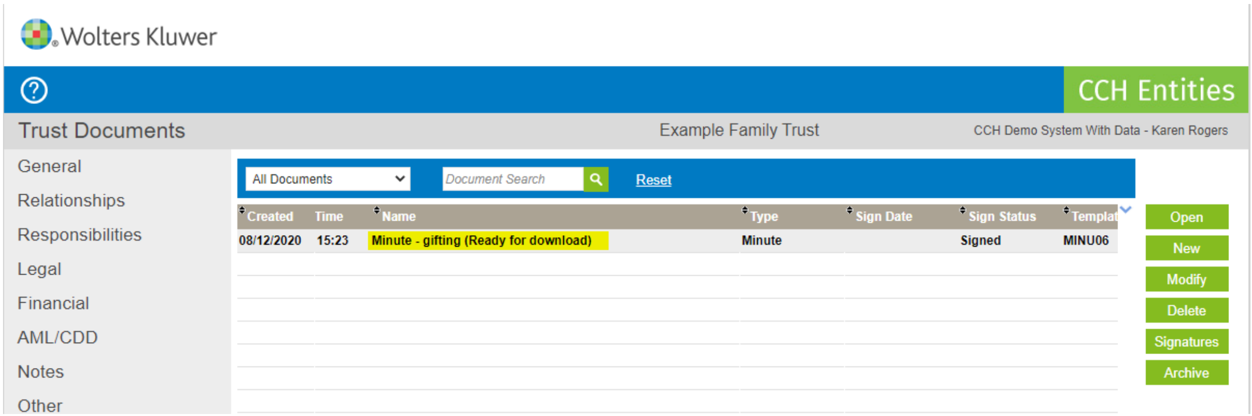
4. You can repeat the reminder process as many times as necessary.



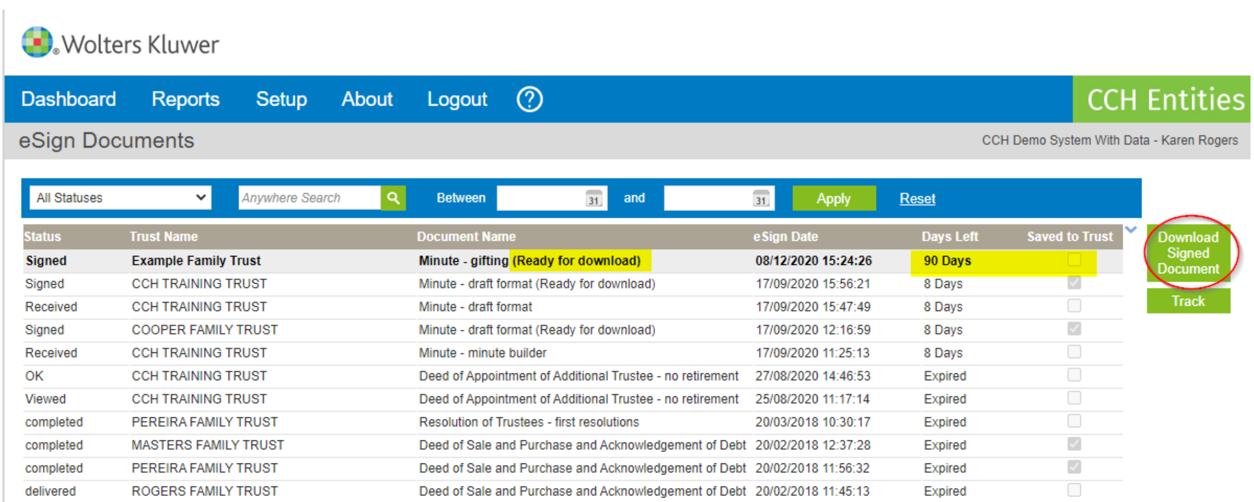
Saving a signed document

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).



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.



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