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Setting up your account

When a firm wants you to sign a document electronically you will receive an email notification from CCH Signatures.

If this is the first time you have been asked to signed documents electronically, you will need to set up your account within CCH Signatures.

You will receive two emails:

1. Notification of a pending document to be signed and instructions on how to access.

   Welcome to CCH Signatures, the chosen digital signature solution of ABC Accountants.
   
   ABC Accountants have sent a document for you to sign electronically.
   
   Ref Number : ABC 123
   Comment : Need signature urgently
   
   In order to sign this document you must first setup a secure account with CCH Signatures.
   
   Click here to go to the secure web site.
   
   Enter your username and password.
   
   Add your name or initials to be used in your electronic signature.
   
   Create a new secure password.
   
   Username: Your email address.
   
   Password: A temporary password will be sent in a separate email.
   
   Click on the training guide link for full instructions on how to setup your account and sign your documents.
   
   If you have any concerns about the content of this email, please contact ABC Accountants Ltd.

   Kind regards
   
   The CCH Signatures Team

2. The temporary password.

   ABC Accountants have invited you to sign documents electronically using CCH Signatures.
   
   This is your temporary password to complete your account setup.
   
   2MpsNy9V
   
   Click on the training guide link for full instructions on how to setup your account and sign your documents.
   
   If you have any concerns about the content of this email, please contact ABC Accountants.

   Kind regards
   
   The CCH Signatures Team

Note: The sender may customize the email templates to their own branding or style.
3. Click on the link provided in the first email to go to the secure website.

4. Enter your email address(username) and the temporary password.

5. You will be prompted to change your password and add additional details of your name and time zone:
   - Name
   - Time Zone
   - New password

6. Enter your first name, initial and last name.
Note: 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.

You must agree to the Terms of Use – by selecting the icon “I Consent to Electronic Package”.

7. If you prefer to sign documents manually you can select “I Do Not Consent”.

The To Do tab, will display the Packages that requires your attention to sign.
Signing a document

1. Sign into the **CCH Signatures** Portal via the email link.

2. Select the item in the **To Do** tab.

   ![Todo List](image)

   **Note:** There may be additional information that the sender may need to clarify with you that will not appear in the notification email regarding the documents requiring to be signed. You will see this in the next screen.

3. Select **Esign** button to open the package. Your package may contain more than document to be signed. It may also need to be signed by more than 1 person.

   ![Esign Button](image)
4. The navigation pane will inform you of how many documents require signing and prompts you to the location fields for signing.

5. You can either choose to sign or reject the document.

Note: if you reject one document in the package all documents are rejected.

6. To sign the document, simply click into the box.

7. Once all fields are signed, check the navigation pane. You need to ensure that it states all completed and all you will see the arrows are green.

8. Click on the ESIGN button.

This completes the process and sends notification back to the originator of the documents.
Multiple Signatories
Documents may need to be signed by more than one person.

The sender will decide if multiple signatories can sign in any order or in a specific order.

If the sender has set a signing order you will not be able to sign until it is your turn to do so.

Once all parties have signed you will receive an email notification that the document is complete and ready to download.

Change the signature style
You can change your signature style or even write your own signature on screen.

1. Click within the signature box and a pop-up box will appear.

2. Select Change Signature to either draw your own signature or select from a predetermined list available.

Note: the name provided is what was originally set when you first signed into CCH Signatures portal. If you wish to change, please contact CCH Support Team.
Rejecting documents

You can reject a document.

1. Click on the reject button.

2. It will prompt you with a confirmation screen.

   Reject?

   IMPORTANT - PLEASE README THE FOLLOWING: You have been given the option to eSign the package. If you reject this option, then a wet ink signature in paper form will be required. If any of the details within the documents are incorrect you may reject eSigning the package and a representative will be in contact with you shortly to discuss the rejection. Do you wish to continue?

   ![Yes No Buttons]

   This will send notification back to the originator, that the documents have been rejected.

   **Note:** If you have received multiple attachments this will reject all documents.
Download your signed document

CCH Signatures portal is not a Management Document System. It will only remain in the portal for 90 days.

You should download and keep a copy of your signed document.

Within CCH Signature portal under the Completed tab, click on the document you require to download.

1. Select the attachment, this will open the PDF.

2. Click on the green document button to download, save and print a copy.