

Digital Signing User Guide



ADLS Digital Signing is a secure tool, enabling you to provide legal services to your client remotely.

While digital signing is accessed through WebForms it is not restricted to WebForms templates. That is, you can also digitally sign other documents through this service.

This Guide assists WebForms users to understand how to set up a document in WebForms for digital signing* and keep track of the signing process, or if using your own document, how to upload it.

WebForms users can manage and track the digital signing process through WebForms, in 3 easy steps, using customised workflows especially designed for lawyers;

1. Set-up each party's signing details on finalised ADLS templates or upload a non-ADLS document
2. Send an 'invitation to sign' to each party*
3. Monitor and keep a full record of the signing process

Security features you can trust:

- 2 step validation process for accessing documents for signing (email and SMS).
- Detailed signing log that tracks the path of the signed document and captures the details of every interaction throughout the signing process, and available for download.
- Real-time, online identity verification options (NZ driver licence, NZ passport or RealMe) provided by the Department of Internal Affairs.
- Signature witnessing option.
- PKI digital certificate attached to each signature, to secure the signature and the document, so any subsequent tampering is detectable.

Further guidance tools including ADLS Digital Signing Practice Notes and Protocols, Terms and Conditions of use, and digital signing fees visit www.adls.org.nz/digitalsigning.

Important Note:

- WebForms users must have the authority of their firm or organisation to prepare and submit a document for digital signing using the ADLS Digital Signing service.
- It is important to read the Digital Signing Terms and Conditions of Use before proceeding.
- ADLS does not recommend the use of shared WebForms logins.
- ADLS has supplied a list of legal documents and forms which are not recommended for digital signing.

www.adls.org.nz | webforms@adls.org.nz | 09 303 5283

1. Uploading a non-ADLS template for Digital Signing

1.1 From the WebForms Dashboard, click 'Upload Non ADLS Documents for Signing'

My forms

+ CREATE NEW FORM

 |

+ UPLOAD NON ADLS DOCUMENTS FOR SIGNING

Drafts

Finals

Signing in progress

Signed

Reminders

1.2 Add the client's details to the 'Form Upload Details' screen, click 'Browse' to locate the PDF document, and Upload.

Form Upload Details

Please select a PDF document to upload to WebForms.
A fee of \$1.00 will be applied for each file uploaded.

Code

Client

Author

Please do not select a file which is:
Password protected
Already digitally signed

BROWSE

Total:

\$0.00

UPLOAD

1.3 Once the form is uploaded follow steps 2.4 below to add signing panels.

2. Setting up the document for Digital Signing in WebForms

Steps for setting up both non-ADLS documents, and ADLS templates

Residential property approved by the Real Estate Authority.

Where this agreement relates to the sale of a unit title property, the purchaser acknowledges that the purchaser has been provided with a pre-contract disclosure statement under section 146 of the Unit Titles Act.

Signature of Purchaser(s):

Purchaser 1

Name/Date

Director / Trustee / Authorised Signatory / Agent / Attorney*

Delete the options that do not apply.

If no option is deleted, the signatory is signing in their personal capacity.

Purchaser 2

Name/Date

Director / Trustee / Authorised Signatory / Agent / Attorney*

Delete the options that do not apply.

If no option is deleted, the signatory is signing in their personal capacity.

Signature of Vendor(s):

Vendor 1

Name/Date

Director / Trustee / Authorised Signatory / Agent / Attorney*

Delete the options that do not apply.

If no option is deleted, the signatory is signing in their personal capacity.

Vendor 2

Name/Date

Director / Trustee / Authorised Signatory / Agent / Attorney*

Delete the options that do not apply.

If no option is deleted, the signatory is signing in their personal capacity.

*If this agreement is signed under:

- (i) a Power of Attorney – please attach a **Certificate of non-revocation** (available from ADLS: 4098WFP or REINZ); or
- (ii) an Enduring Power of Attorney – please attach a **Certificate of non-revocation and non-suspension of the enduring power of attorney** (available from ADLS: 4997WFP or REINZ); or
- (iii) where the attorney signs for a trustee, a Certificate in the relevant form in Schedule 4 to the Trustee Act 1956.

Also insert the following wording for the Attorney's Signature above:

Signed for [full name of the donor] by his or her Attorney [attorney's signature].

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2.1 'Finalised' WebForms documents can be set up to be digitally signed, following a few steps in the WebForms system.

2.2 Digital signing 'placeholders' will appear on all key WebForms documents once finalised. The placeholders show on screen as an orange box. They can be moved or deleted, and additional placeholders can be inserted.

2.3 An 'Add Signature Box' and 'Invite to Sign' prompt has been added to the top menu bar within WebForms.

- 2.4 If there is not a signature placeholder where you require the client to sign, WebForms subscribers can click 'Add Signature Box' and draw a signature box as required.

Upon clicking 'Add Signature Box', a pop-up box (as below) will ask for the details of the signing party, as follows:

- 'Enter signing party's name' – give a name to the signature box, to clarify which party, signs where.
- 'Signature type' – select the type of signature required e.g. a full signature, or initial
- 'Add to all pages' – this will add a signature placeholder to each page. For example, an initial on each page. The user can then move the signature box into position on each page as required.

The 'Add signature box' pop-up form contains the following elements:

- Add signature box** (title bar with a close button)
- Enter signing party's name** (text label)
- If an individual is signing multiple times or in more than one capacity, then repeat the signature box (positioned where applicable) using the same signing party's name for each box.
- Text input field for the name.
- Signature type** (text label)
- Dropdown menu with 'Full' selected.
- Toggle switch for 'Add to all pages' (checked).
- CANCEL** and **OK** buttons.

Note: Check the position of the signature boxes on all pages in the document, where applicable. For documents requiring multiple signatures by one signing party, WebForms users should use the same signing party's name for each signature box. This will enable those digitally signing the document to receive one request for multiple signatures. WebForms will not allow you to add the same details for the signing party more than once in the 'Invite to Sign' screen.

- 2.5 When all signature placeholders have been added, click 'Invite to Sign', and an Invite to Sign box will appear, to be completed.
- a. Signing expiry date – set the date you wish to have the digital signing completed by. This is a mandatory field.
 - b. Set signing order – can be used to sequence the signing process, allowing the next signing party to receive an invitation to sign when the previous one has completed their signing
 - c. Date stamper – the nominated date stamper will add the date of execution to the document, once all parties have signed. The details in the date stamper field will revert to the person who set up the document for signing unless specified otherwise.
 - d. Signatures - to add the signing party/s details, click the red arrow to the right of the title, this will expand the field (see Page 5).

The 'Invite to sign' form includes the following sections:

- Signing Expiry Date ***: A date picker and a toggle for 'Set signing order' (checked).
- Date Stamper**: A toggle for 'Date Stamper' (checked).
- Signatures**: A table with columns: Name, Email address, Info, Status. It lists four parties: Purchaser 1, Vendor 1, Purchaser 2, and Vendor 2. Each row has a red arrow icon on the left.
- Date Stamper**: A table with columns: Name, Email address, Info, Status. It is currently empty.

Title	Name	Email address	Info	Status
✓ 1	Landlord Signature			
Contact details User <div>External user</div>		Options Verification <div>None</div>		
First name <div></div>		Last name <div></div>		
Email address <div></div>		SMS <div><input checked="" type="checkbox"/></div>		
Country <div>New Zealand(+64)</div>		Notify me <div><input checked="" type="checkbox"/></div>		
Mobile <div></div>		Witness <div><input checked="" type="checkbox"/></div>		
		Additional Recipients <div><input checked="" type="checkbox"/></div>		
		Matching <div>None</div>		

- e. User – select either an ‘external user’ (i.e. not a WebForms user) or select from the list of WebForms users in your firm if one of them is a signing party. Selecting an internal user will pre-populate the signing party’s information, (SMS and verification options are not available for internal users).
- f. First and Last names – it is important these details are set up correctly, as they will appear on the signature panel on the final version of the document.

- j. Verification – this important online verification option provides additional rigor around the assertion of the signature and requires the signing party to verify themselves using either their Real Me, NZ Driver’s Licence or NZ Passport identification. This is not a mandatory option.

Note: The ID Check log which confirms the ID match is appended to the document. The details of the ID (e.g. driver’s licence number) are not visible on the log.

Verification

None

None

Real Me

NZ Driver License

- k. Matching – WebForms users can select ‘Matching’ when they have also selected a ‘Verification option’, which is an optional security verification step. Matching will match the signing parties’ details held by the law firm, with those provided by the online ‘verification’ option. For example, the date of birth or the driver’s licence number or the passport number (depending on what was selected).

Date of birth

Date of birth

- l. Witness – Select when a witness to a signature is required. The invite to sign screen will collapse when Witness is selected, and the WebForms user can then set a placeholder/s for the witness’ signature.
- Note: The signing party sets up the Witness details.*
- m. SMS – this is mandatory and is automatically selected for an ‘external signing party’. It is not selected for an internal signing party (i.e. a WebForms User).
- n. Notify Me – if enabled, informs the WebForms user by email when the signing parties have completed signing.
- o. Additional Recipients – the WebForms user can designate a Reviewer (presumably the party’s lawyer) for each signatory. The Reviewer must ‘approve’ the document before its then sent to the signing party to sign.

SMS
☒

Notify me
☒

Witness
☒

Additional Recipients
☒

The SMS sends the passcode to the signing party/s required to access the document for digital signing.

Invite to sign

Signing Expiry Date *

25/09/2020 05:00 PM

Set signing order

Date Stamper

Signatures

	Name	Email address	Info	Status
> 1	Vendor 1 Client 123	webadmin@adls.org.nz	Phone: +64 729992346 Verification: NZ Passport	
> 2	Purchaser 1 Client ABC	legalforms@adls.org.nz	Phone: +64 462228776 Verification: NZ Driver License	
> 2	Reviewer Reviewer 123	webforms@adls.org.nz	Phone: +64 351119495	
> 3	Purchaser 2			
> 4	Vendor 2			

Date Stamper

	Name	Email address	Info	Status
>	Date Stamper WebForms User	legalforms@adls.org.nz	Phone: +64 729992346	

Once all signature details have been entered, clicking the 'Invite' button will go to the next step, (Summary of Charges).

- 2.6 Summary of Charges – a summary of charges will be displayed. WebForms forms charges and system fees are additional. Refer ADLS WebForms pricing for a full summary of charges www.adls.org.nz

Summary of charges

Charges

Item	Count	Sub Total
Signature	2	\$2.00
SMS	2	\$0.40
Verification - NZ Driver License	1	\$4.50
Verification - NZ Passport	1	\$6.00
Total		\$12.90

All prices shown are GST exclusive

☒ I agree to the [Terms and Conditions](#) for signing

CANCEL

PROCEED

- 2.7 WebForms users must read and agree to the ADLS Digital Signing Terms and Conditions and accept the Summary of Charges by clicking 'Proceed'.

At this point the Invitation to Sign has been sent and users will be taken back to the document on the WebForms page.

Once the signing invitations have been sent, users cannot set up any additional signing parties.

However, users can cancel the signing process if required, or amend the existing signing parties' details, or extend, or bring forward the signing expiry date.

To cancel signing, or update the invitation to sign:

1. Open the document in WebForms
2. Click 'Invite to Sign'
3. Make the changes, if any
4. Then click 'Update the Invite', or 'Cancel Invite'

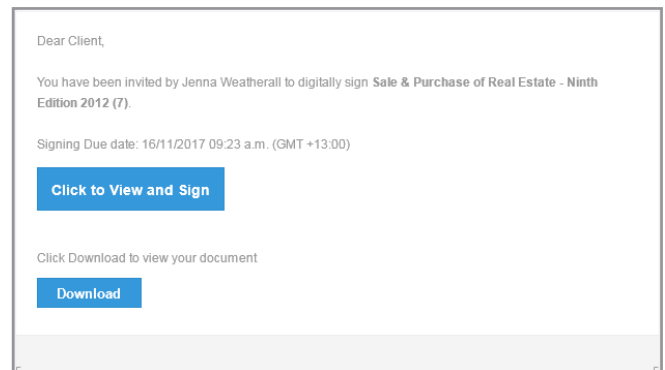
2. Digital Signing (What the Signing Party needs to do)

The actual digital signing process is managed by a third-party digital signature service provider (Secured Signing Limited). Their individual terms and conditions apply.

These steps outline what the signing party needs to do to digitally sign the document. WebForms users may wish to make their client aware of the process in an email beforehand. You may also wish to refer to the suggested User Protocols.

- 2.1 Invitation to Sign - the signing party will receive their 'Invitation to Sign' email with a 'Click to Sign' link requesting a passcode.

The passcode is sent separately via an SMS, for additional security protection, once the 'Click to sign' box has been clicked.



Dear Client,

You have been invited by Jenna Weatherall to digitally sign **Sale & Purchase of Real Estate - Ninth Edition 2012 (7)**.

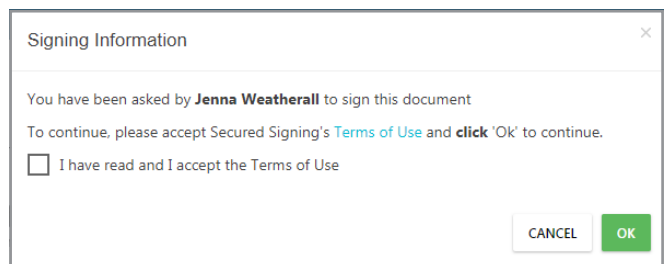
Signing Due date: 16/11/2017 09:23 a.m. (GMT +13:00)

[Click to View and Sign](#)

Click Download to view your document

[Download](#)

- 2.2 Once the passcode from the SMS has been entered successfully, the signing party will be prompted to accept the digital signature service providers Terms of Use.



Signing Information

You have been asked by **Jenna Weatherall** to sign this document

To continue, please accept Secured Signing's [Terms of Use](#) and **click 'Ok'** to continue.

☐ I have read and I accept the Terms of Use

[CANCEL](#) [OK](#)

- 2.3 The signing party will then automatically be taken to the signature placeholder on the document and be requested to 'Click to Sign'.



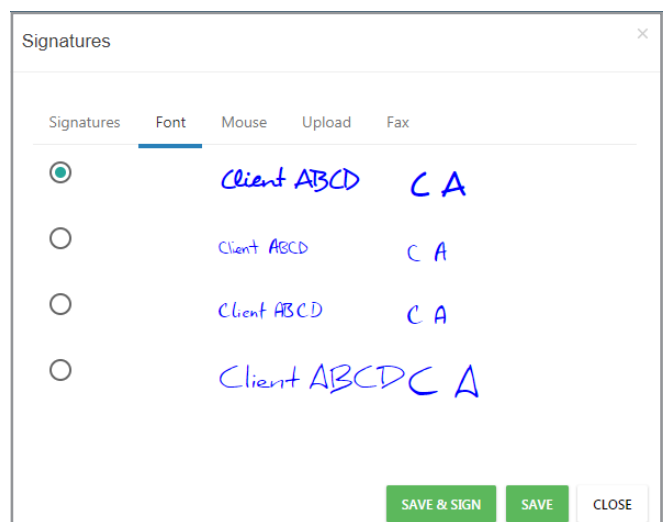
Secured Signing

[Click to Sign](#)

- 2.4 Once they 'Click to Sign', the signing party will then be given options for selecting their signature style.

The signing party can select a pre-drawn signature, from a selection of fonts available, or draw their signature using either their finger or a stylus pen if using a touch screen device. Alternatively, they can upload their signature or fax in a copy of their signature.

If signing on tablet or mobile phone the signing party will only have the option to draw their signature using their finger or a stylus pen.



Signatures

Signatures Font Mouse Upload Fax

<input checked="" type="radio"/>	Client ABCD	C A
<input type="radio"/>	Client ABCD	C A
<input type="radio"/>	Client ABCD	C A
<input type="radio"/>	Client ABCDC A	

[SAVE & SIGN](#) [SAVE](#) [CLOSE](#)

- 2.5 By clicking 'Save & Sign' the signing party will then be taken to a 'Signing Complete' page. At this point they can 'Click to View the Document', which will show their signature/s and those of any other digitally signed signatures which have been completed.
- If a witness to the signature is required, see steps 3.1.
 - If verification is required, see steps 4.1.

- 2.6 Once the document has been signed, by all parties, an email will be sent to the WebForms user to confirm. The email provides a document log of all signatures completed, with name, date and time, as well as a copy of the signed document. The signed document and detailed log will be available in WebForms and can be accessed and downloaded via the 'Form Info' button in WebForms.

Document Log for "Sale & Purchase of Real Estate - Ninth Edition"	
• Jenna Weatherall	WeSign Package Complete email sent to Jenna Weatherall [test1864@adls.org.nz] for doc name: Sale & Purchase of Real Estate - Ninth Edition sent by Jenna Weatherall [test1864@adls.org.nz] on 04 Jul, 2017 at 02:08:49 p.m. (GMT +12:00)
• Jenna Weatherall	WeSign Package Complete email sent to Jenna Weatherall [test1864@adls.org.nz] for doc name: Sale & Purchase of Real Estate - Ninth Edition sent by Jenna Weatherall [test1864@adls.org.nz] on 04 Jul, 2017 at 02:08:49 p.m. (GMT +12:00)
• Jenna Weatherall	WeSign Process Complete on 04 Jul, 2017 at 02:08:47 p.m. (GMT +12:00)
• ADLSI WebForms	Signed Document on 04 Jul, 2017 at 02:08:47 p.m. (GMT +12:00)
• ADLSI WebForms	Acknowledged the receipt of the document as a Witness on 04 Jul, 2017 at 02:08:28 p.m. (GMT +12:00)
• Jenna Weatherall	WeSign Invitation email sent to ADLSI WebForms [adlsi.webforms@gmail.com] for package: Sale & Purchase of Real Estate - Ninth Edition on 04 Jul, 2017 at 02:05:49 p.m. (GMT +12:00)
• Client ABC	Signed Document on 04 Jul, 2017 at 02:05:41 p.m. (GMT +12:00)
• Jenna Weatherall	Invited ADLSI WebForms as a Witness on 04 Jul, 2017 at 02:05:33 p.m. (GMT +12:00)
• Client ABC	Acknowledged the receipt of the document as an Invitee on 04 Jul, 2017 at 02:04:01 p.m. (GMT +12:00)
• Jenna Weatherall	WeSign Invitation email sent to Client ABC [legalforms@adls.org.nz] for package: Sale & Purchase of Real Estate - Ninth Edition by Jenna Weatherall [test1864@adls.org.nz] on 04 Jul, 2017 at 02:03:49 p.m. (GMT +12:00)
• Jenna Weatherall	Started WeSign Process on 04 Jul, 2017 at 02:03:34 p.m. (GMT +12:00)
• Jenna Weatherall	Invited Client ABC on 04 Jul, 2017 at 02:03:34 p.m. (GMT +12:00)

- 2.7 Signing Progress - at any stage the WebForms User can check the 'Form Info' option in WebForms to see the status of the signing process.

Signing: 0 of 2 Signed		due by: 21 Jul 17 2:52 p.m.
Client 123:	In Progress	
Client ABC:	Signed	
Client ABC (Witness):	In Progress	
		View detailed log

3. Witnessing

These steps will only occur if a witness to the signature is required.

- 3.1 If the WebForms User has selected the option for a Witness (see 1.5. k) then, when the Signing Party 'Clicks to Sign' (see 2.4), they are prompted for 'Witness Details'. This requires a unique email address for the Witness.

Witness Details

You **require** a witness for your signature.
Please **fill** in the details below and **click** Ok

Witness1:

Email: webforms@adls.org.nz

First name: John

Last name: Client

Mobile number: 0211234567

☒ You acknowledge that you need to electronically sign this document in the presence of a witness.

CANCEL OK

- 3.2 Once the signing party has nominated their witness, the signing party can then carry on the signing process (step 2.5 and 2.6) in the presence of their witness.

- 3.3 An email will be automatically sent to the witness to invite the witness to digitally sign the document as they are witnessing the signature of the Signing Party. The witness will receive a passcode by SMS.

ADLS WEBFORMS™

Dear John,

You have been invited as a witness by Client ABC to digitally sign Deed of Guarantee of Tenant

[Click to View and Sign](#)

- 3.4 This Witness Invitation to Sign email process is the same as that in 2.1, except that the Witness is required to confirm their details, and confirm they were present and witnessed the electronic signing of the document.

Confirm Details

You have been requested to act as a witness for Jena Tau

Please **fill in/check** the details below and **click** Sign

First name: John Last name: Client Job Title: Administrator

Street: 24 Test Street Suburb: Takapuna City: Auckland

Country: NEW ZEALAND

Please enter the SMS code in the space below

123456

☒ I confirm that I was present and witnessed the electronic signing of this document.

CANCEL SIGN


Note: It is important that the client and the witness are aware of their legal obligations when witnessing and signing. (See the Disclaimers in the screens above).

4. Identity Verification

These steps will only occur if identity verification has been selected in 1.5(i)

4.1 If ID verification is required, then after clicking 'Save and Sign' (refer 2.6) a prompt will request the 'IDCheck Service'. Only the ID specified will show for verification (e.g. New Zealand Driver Licence).

IDCheck Service




☐

RealMe Verified ID

Invitee who needs to sign can securely prove identity by using RealMe Verified ID

You have 2 retries.




☒

New Zealand Driver Verification

New Zealand Driver Verification

You have 2 retries.



☐

New Zealand Passport Verification

New Zealand Passport Verification

You have 2 retries.


CANCEL

OK

4.2 Once verified, the signing party can then carry on through the signing process (see step 2.7).

Note: The ID Check log will be appended to the document. The details of the ID are not visible.

New Zealand Driver Verification



First Name *

Middle Name *

Last Name *

Date of Birth *

DAY

MONTH

YEAR

Driver's Licence number *

Licence version *

CANCEL

SIGN

In this example the identification required is a NZ Driver Licence