

3-Step Overview for Authority & Instruction (A&I) Digital Signing

1 LAWYER / WEBFORMS USER Create & Send

BEFORE BEGINNING

Lawyer/WebForms user must:

- Receive and check the client ID is current (NZ passport or NZ drivers' licence)
- Obtain linking documents, if required
- Contact client to ensure proposed witness is eligible

LAWYER/WEBFORMS USER

- Creates A&I form (incorporating client's ID and, if required, linking documents)
- Invites client to participate
- Sends email to client attaching practitioner's [letter](#) and [instructions to witness](#) (ADLS templates available)



2 CLIENT & WITNESS TOGETHER Verify & Witness

BEFORE BEGINNING

Client must:

- Have original ID (and linking documents, if required) for verification
- Receive witnessing instructions and hand these to the witness
- Have a mobile phone and access to the internet through a laptop (or similar)

CLIENT & WITNESS RESPECTIVELY RECEIVE:

- Digital signing request email; and
- SMS code for secure verification

WITNESS MUST CERTIFY:

- Photo ID is a true likeness of the signatory
- Witness has seen original ID (and, if required, linking documents)
- Photo, names and number of original ID (and details of any linking documents) match those on the A&I form

WITH THE CLIENT & WITNESS PHYSICALLY PRESENT

Client:

- Clicks on link in email to trigger SMS code and to start digital signing process, entering the SMS code
- Selects signature style
- Enters witness' contact details for signing request
- Completes ID verification details
- Views digital signature

Witness:

- Clicks on link in email to trigger SMS code and to start digital signing process, entering the SMS code for the first time
- Completes certification (including verification of original ID against the copy on screen and that it is a true likeness of the client)
- Selects signature style
- Completes address details
- Enters the SMS code for second time



3 LAWYER / WEBFORMS USER Check & Record

LAWYER/WEBFORMS USER

- Opens and checks the signed and verified A&I form
- Opens, checks and retains the detailed log of the signing process, the A&I form and the ID
- Creates and retains a [file note](#) (ADLS template prompt available)
- Any other records required e.g. copies of the letter to client and witness instructions



Note: This is an overview only. Please read the ADLS Protocol for further guidance, which requires compliance with the LINZ e-Dealing Standard and associated Guidelines.