Electronic signatures (i.e., e-signatures) are legally binding and can be used to replace handwritten signatures. They can also use more advanced cloud signatures that rely on certificate-based digital IDs to provide stronger signer authentication. With Adobe Sign, recipients can electronically sign documents by typing or drawing their name on their computer or mobile device or uploading an image of their signature.

The following document shows how to use Adobe Sign to prepare a document for signatures, and how to electronically sign a document.

**NOTE:** You will need access to the Adobe Creative Cloud in order to use Adobe Sign features. Additionally, a secure certificate based digital ID (or digital signature) for Adobe Sign is tied to your Adobe Creative Cloud account, which is associated with a valid RSCCD email address.

**NOTE:** Login instructions and software installation steps for Adobe Creative Cloud are located here:

Adobe Creative Cloud Home Use for Faculty and Staff

**NOTE:** A training video covering the main contents of the Adobe Sign guide can be found here:

Adobe Sign Training – Shared screen with speaker view.

For further assistance, please contact the RSCCD ITS Help Desk.

714-564-4357 | Ext 44357 | helpdesk@rsccd.edu | webhelpdesk.rsccd.edu | Mon-Fri, 7:30am-4:30pm
Prepare document for e-signatures

The **typical workflow** for preparing a document for electronic signatures (i.e., e-signatures) in Adobe Sign is:

1. Upload document(s) to Adobe Sign
2. Add signers
3. Specify where to fill and sign
4. Send and track progress

Upload document to Adobe Sign (using Adobe Acrobat DC)

To use Adobe Sign with Adobe Acrobat DC:

1. **Open the file** you want to send in **Adobe Acrobat DC**.
2. **Click “Adobe Sign” on the right panel**
   OR
   Go to Sign > Request Signatures
   OR
   Go to Fill & Sign > Request Signatures

![Image of Adobe Acrobat DC with Adobe Sign feature highlighted]

**NOTE:** To use the Adobe Acrobat website instead, please see steps for “Using Adobe Acrobat website to prepare a document for signatures”.
Add signers to document

After opening Adobe Sign, you will be prompted to enter the following:

1. In the **Signers** field, specify the email address(es) of the signers.
   a. Use “Add CC” to carbon copy the email to other recipients that are not signers.
2. In the **Subject & Message** field, specify the email subject and message body text.
3. **OPTIONAL:** To add additional files to the agreement, click **Add Files** > Select the document(s) to upload > Open.
4. For **More Options** see subsection for Upload a Document to Adobe Sign - More Options.
5. When complete, click “Specify Where to Sign”.

**Add signers to a document**

1. In the **Signers** field, specify the email address(es) of the signers.
   a. Use “Add CC” to carbon copy the email to other recipients that are not signers.

2. In the **Subject & Message** field, specify the email subject and message body text.

3. **OPTIONAL:** To add additional files to the agreement, click **Add Files** > Select the document(s) to upload > Open.

4. For **More Options** see subsection.

5. When complete, click “Specify Where to Sign”.

**Supported File Types for Signing**

1. **PDF** is the primary file format used with Adobe Sign electronic signatures.
2. Besides PDF, you can send Microsoft Office files, various image files, HTML files, and text files for signing.

3. **Supported file types** are: DOC, DOCX, RTF, XLS, XLSX, PPT, PPTX, TXT, CSV, HTML, HTM, TIFF, TIF, BMP, GIF, JPG, JPEG, and PNG.
More Options

Under “More Options” there are additional features you can use:

**NOTE:** These are optional, not mandatory.

1. Toggle switch for documents to “Complete in Order” or “Complete in Any Order”
2. **Password Protect** the document
3. **Set a Reminder** for the document
4. **Set a language** for the Recipient of the document.

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**Upload a Document - More Options**

1. Toggle switch for documents to “Complete in Order” or “Complete in Any Order”
2. Password Protect the document
3. Set a Reminder for the document
4. Set a language for the Recipient
Specify where to fill and sign document

Under “Specify where to fill and sign” screen, you can:

1. Specify fields that need a signature (e.g., “Signature Fields” options).
2. Specify required fields for specific recipients (e.g., fields that are “Assigned To” specific recipients)
3. Specify field types and default values (e.g., Read-only fields, checkboxes marked by default, etc.)
4. Modify size, shape, look and feel of the fields.
5. Copy, clone, repeat, and delete fields.

When done, click “Send” at the bottom of the document.

To edit a specific field:

1. Right click the field > Edit
   OR
2. Use the right panel to “Drag and Drop” the desired field type.
Tips for specifying fields
Consider the following when specifying fields:

1. Field must be “Assigned To” either a specific individual, or “Anyone”.
2. All recipients are assigned a color code. Use the color code on the top right corner of each field to determine who it is assigned to.
Signature Fields

There are 5 different kinds of signature fields available. By default, signature and initials fields are mandatory, denoted by a red asterisk.*

**NOTE:** “Signature” and “Initials” fields are the most commonly used.

1. **Signature (Recommended)**
   a. **NOTE:** Does not require a recipient to have an Adobe ID; does not require sign-in to Adobe Creative Cloud.
   b. **NOTE:** If a signer does have an Adobe ID or Adobe Creative Cloud, such as an RSCCD employee, they may be prompted to create a signature as shown here: [Sign a document using the email link](#).

2. **Digital Signature**
   a. Requires a recipient to have a digital ID certificate service such as GlobalSign (not recommended).

3. **Initials**
   a. Similar to Signature field; does not require an Adobe ID or sign-in to Adobe Creative Cloud.

4. **Signature Block**
   a. The signature block is a group of fields. The signature block field cannot be made optional and is always required.
   b. By default, the signature block contains both a signature field, and an e-mail field.

5. **Stamp**
   a. Stamp fields can serve double duty as either a stand-alone signature, or in support of another signature fields. For example, you may need to place a personal signature, as well as a corporate seal or stamp.

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**Specifying Signature Fields**

There are 5 different types of signature fields available.

By default, signature and initials fields are mandatory, denoted by a red asterisk*.
Missing Signature Fields

There are recipients who need to sign this document that do not have a signature field assigned to them. You can go back and add signature fields or we will add a signature block for those recipients. Do you want to review or send the document?

**NOTE:** Each signer needs to have been assigned a required Signature field. If a signer does not have a required signature field assigned, or has only been assigned an optional signature field, Adobe Sign adds a Signature block at the bottom of the document.
Prefill Document Fields (Optional)

1. **OPTIONAL** – If you specified the “Prefill” role for any of the fill fields, you will be taken to a screen where you can **Prefill the document fields** before sending the final document to the recipients.
   a. See bottom of screen for the “Thank you for prefilling this document” notification.
2. When done with the prefilled fields, click “Click to Send” at the bottom of the document.
**Send document**

After preparing the document, preparing the prefill fields, and clicking **Send**, you will receive a notification that “**<Document Name> has been successfully sent for signature.**” A copy of this notification will also be sent to your email.

"New User Account Request Form v016" has been successfully sent for signature

A copy has also been sent to you at [redacted] for your records.
"New User Account Request Form v016" was sent for signature to [redacted].

As soon as the agreement is complete, all eligible parties will be e-mailed PDF copies.

**Reminders**

There are no reminders set for this document.

**You will be alerted if:**

- The document you sent has **not been viewed by today at 6:29 PM**.
- The document you sent has **not been signed by Jul 22 at 10:29 AM**.

**Change alert settings**

All agreements that are not completed within 365 days will be automatically expired.
Track progress of document

1. Login to Adobe Sign website at https://na1.documents.adobe.com/public/login and go to Manage to view the history and current status of each document.

OR

2. Open Adobe Acrobat DC > Sign > Manage All Agreements > All Agreements > Open Adobe Sign (this takes you to the website above).
Signed Document Review

When a document is successfully e-signed, it will show to all recipients with signatures and detailed dates, including the time when each individual signed.
Using Adobe Acrobat website to prepare a document for signatures

You can also prepare a document for signatures using the Adobe Acrobat website.


**NOTE:** You will need a valid RSCCD email address to login to Adobe Acrobat website. Login instructions for Adobe are located here: [https://www.rsccd.edu/Departments/Information-Technology-Services/Documents/Adobe-Creative-Cloud-Home-Use-for-Faculty-and-Staff.pdf](https://www.rsccd.edu/Departments/Information-Technology-Services/Documents/Adobe-Creative-Cloud-Home-Use-for-Faculty-and-Staff.pdf)

Once you are logged in, go to Request Signatures > Go to Adobe Sign to prepare the document.
Signing a Document with e-signature

There are two ways to sign a document using Adobe:

1. Sign a document using the email link

**NOTE:** If someone has used Adobe Sign to send you an agreement for signing, you receive an email notification with a link to sign.

- **Email sent from:** echosign@echosign.com
- **Subject Line:** Signature requested on “<Document Name>”
- **Example screenshot:**

**NOTE:** Also, if you use Acrobat DC or Acrobat Reader DC desktop application, you see a notification that an agreement has been shared with you for signing (in Adobe Acrobat DC, this is located under the menu option “Sign” > Manage All Agreements)
Sign a document using the email link

If someone has used Adobe Sign to send you an agreement for signing, you receive an email notification with a link to sign the agreement.

1. Click the link of the agreement received in your email for signing ("Review and Sign" button). The agreement opens in a web browser.
2. Click in the fields and enter any requested information.
3. Click the signature field. If you are signing for the first time, you see the Signature or Initials panel.
   - **Type:** Type your name in the field. You can choose from a small selection of signature styles; click Change Style to view a different style.
   - **Draw:** Draw your signature in the field.
   - **Image:** Browse and select an image of your signature.
   - **Mobile:** Select this option to create your signature on a mobile device. Enter your mobile number and click Send. A link is sent to your mobile. Clicking the link opens the web browser on your mobile device where you can draw or select an image of your signature.
   - **Save:** When this check box is selected, and you're signed in to Acrobat Reader or Acrobat, the added signature is saved securely in Adobe Document Cloud for reuse.
4. Click **Apply** to place the signature or initial.
5. Click **Click To Sign**.
**Sign a document using Fill & Sign (Adobe Acrobat DC)**

To sign a document in Adobe Acrobat DC using Fill & Sign:

1. Open Adobe Acrobat DC
2. Go to **Tools > Forms & Signatures > Fill & Sign**  
   OR
3. Go to **Sign > Fill & Sign**
5. When the Fill & Sign tool appears (asking “Who needs to fill and sign?”) select “You” for “Fill and Sign”.

![Fill & Sign tool interface with highlighted options for selecting who needs to fill and sign. The options are "You" and "Others". The "You" option is selected.]
7. If you've already added your signature or initials, just select it from the Sign options, and then click at the place in the PDF where you want to add your signature. Skip to the next step.
   - **Type**: Type your name in the field. You can choose from a small selection of signature styles; click Change Style to view a different style.
   - **Draw**: Draw your signature in the field.
   - **Image**: Browse and select an image of your signature.
   - **Save Signature**: When this check box is selected, and you're signed in to Acrobat Reader or Acrobat, the added signature is saved securely in Adobe Document Cloud for reuse.

8. To move the placed signature or initial, click the field to highlight it and then use the arrow keys. To resize or delete the field, use the options in field toolbar.
Tips for using an image as a signature

**NOTE:** If you want to use an image as your signature:

1. Sign your name in black ink on a clean, blank sheet of white paper.
2. Sign in the middle of the paper so you don't photograph or scan the edges.
3. Photograph or scan your signature. If you are taking a picture of your signature, make sure that the page is lit and that no shadows fall across the signature.
4. Transfer the photo or scan to your computer. Acrobat/Reader accepts JPG, JPEG, PNG, GIF, TIFF, TIF, and BMP files. You do not need to crop the image. Acrobat/Reader imports just the signature if the photo or scan is fairly clean.
Send your signed form to others
After you complete your form and sign it, you can share it with others.

**NOTE:** These include optional steps to take after you sign a form.

1. Open the PDF document or form in Acrobat or Reader, and click **Fill & Sign**

2. In the **Fill and Sign** toolbar, click Next.

3. Send your form using any of the following methods
   a. Send an anonymous or public link to your signed document
   b. Send a copy of the signed document in a personalized email
   c. Send the document to get signatures from others
Send an anonymous or public link to your signed document (non-editable)

Send a link of the non-editable copy of the filled and signed form. The copy is certified with Adobe Sign. Recipients won’t be able to modify the copy easily; any modification makes the certification invalid.

1. Click Get A Link, and then click Create Link.
2. Anyone with access to the link can view, but cannot make any changes to the document. Share the link in one of the following ways:
   a. Click Copy Link, and share it with others in an email.
   b. Click Attach link to Email. Your default email is displayed. The subject line is the name of the filled form and the body text of the email has the link to your filled form. Modify the subject and body text of the email if required. Add recipients’ email in the To field and click Send.
Send a copy of the signed document in a personalized email (non-editable)

**Send a read-only copy of your completed document by email.** Recipients can view the file but cannot make any changes to the document.

1. Click **Send a Copy**.
2. Enter the email address of whoever you’d like to send the document. You can also use the **Address Book** link to choose email addresses.
3. The **Subject and Message** fields are just like the ones you use for sending an email and appear to your recipients in the same way. Enter the desired information. Click **Send**.
Send the document to get signatures from others

1. Click **Request Signatures**, and then click **Get Started**.

2. You will be taken to Adobe Sign and prompted to enter a list of Signers, Subject & Message, Files, etc.

**NOTE:** Follow the steps in this document for **Prepare document for e-signatures** to continue.
Send a Mega Sign document

Mega Sign lets you send an individual document for signature to many people at once (maximum of 300 recipients, minimum of 2).

To access Mega Sign features:

2. In the Mega Sign menu, there are two ways to enter recipients email addresses. You must either:
   a. Manually enter the email addresses of the recipients in the “To” field
   OR
   b. Click “Import Recipients and Merge Fields from File” > and click the link for “Download a sample CSV file”. Open the “megasign_merge_sample.csv” document in Microsoft Excel.

**NOTE:** You can enter up to 300 email addresses in Mega Sign with a minimum of 2. If you are sending to a large number of recipients, we recommend using option 2b for the CSV file.
3. In the `megasign_merge_sample.csv` document:
   a. Column A for "_es_signer_email" is a mandatory field. This is where you indicate the email addresses of the recipients.
   b. You can ignore or delete the other columns (they are not mandatory).
   c. When done, **Save** the CSV file.
4. After you have saved the CSV file -- return to the Mega Sign menu, click import recipients again, and then click upload. Select the saved CSV file and click Open.

5. Enter an **Agreement Name**

6. **Upload the document(s)** you want to request signatures for.
7. **To Send the Mega Sign agreement**, you must either:
   a. **Click “Send”** – this will automatically add a signature block to the end of the document and send it to each recipient for signing.
   OR
   b. **Check the box for “Preview, position signature or add form fields” > Next.** This allows you to customize the form fields in the document. Please see steps for “Specify where to fill and sign document” for further instructions.
8. Each recipient receives an email with the agreement, and are guided through the standard field completion and signing steps. When a recipient is done signing, a copy of the document is sent to all parties.

9. We can check the status of each individual document by returning to https://na1.documents.adobe.com/public/login > Manage menu.
Modifying an agreement after it was sent

If you have already sent a document and need to make changes (e.g., forgot to add all form fields, need to change a field), you can still make changes to the agreement if no one has signed it yet.

1. To modify an agreement that was sent (but that no one has signed yet):
   a. Click “Modify Agreement” on the Send document confirmation screen
      OR
   b. Go to https://na1.documents.adobe.com/public/login > Manage menu > find the agreement > click “Modify Agreement”

NOTE: If you do not see the option for “Modify Agreement”, that means it cannot be modified, and needs to be prepared and sent again.
2. From the Send page (with limited editing options):
   a. Options that CANNOT be edited will be **greyed out**.
   b. Options that CAN be edited will have full functionality.
   c. To modify the form fields in the document itself, click “Preview & Add Signatures” Next.

3. When you are done, either click “Send” to send the document or “Update” and then send the document.
Recipient interaction with Modified Agreements

4. The recipient of a modified agreement is notified that the agreement has changed immediately after clicking the “Review and sign” button on the email.
5. The recipient must click “OK” before they can sign, approve, or delegate the agreement to acknowledge that the agreement is changed.
Tracking modifications to sent agreements

6. Under the Manage menu at https://na1.documents.adobe.com/public/login, users can see exactly when the agreement was modified on the History tab.
Conditions for modifying a sent agreement

**NOTE: You CANNOT modify a sent agreement if:**

- Signer has signed
- Approver has approved
- Delegator has delegated*
  - *Can modify after delegating if:
    - Signer has delegated signing and document is still not signed.
    - Approver has delegated approving, and the document is still not approved.
- Agreement was rejected.
- Agreement needs digital ID signature or fax signature.
Index & References:

- Field types:  https://helpx.adobe.com/sign/using/field-types.html
- Send documents for signature:  https://helpx.adobe.com/acrobat/using/send-for-signature.html
- Sign PDF documents:  https://helpx.adobe.com/acrobat/using/signing-pdfs.html#Signanagreement
- Fill and Sign PDF forms:  https://helpx.adobe.com/acrobat/using/fill-and-sign.html#Sendyourform
- Send a Mega Sign by using a .CSV file to import the recipients and their details:  https://helpx.adobe.com/sign/using/mega-sign.html
- Modify a sent agreement’s documents or fields:  https://helpx.adobe.com/sign/using/modify-document-sent-for-signature.html

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