RightSignature
Client Instructions

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RightSignature is a tool used by Crowe MacKay that allows your accountant to send documents needing your signature directly to your email address.

This allows you to provide your legal signature and return the documents digitally, directly from the RightSignature interface.

1. Receiving a Document

When a document is ready for your signature, you will receive an email from RightSignature indicating your accountant has sent you a document to sign.

When you open the email, you will see additional information about the document to sign. Once you are ready to proceed, click on the Review & Sign Document button.

Blankpdf (blankpdf.pdf)
Reference #: 42490ae7-da6a-4ed8-8d58-166fa933aef6
Status: Pending
Expires: 12/16/2022 11:12
Sender: Austin Lockler

To review the document and sign with an electronic signature, follow this link:

REVIEW & SIGN DOCUMENT

2. Signing a Document

After clicking the Review & Sign Document button, a new browser tab will be opened displaying the document. On this page you will be able to scroll through and review the entire document. Wherever a signature is required, you will see a Sign Here box similar to this.

Clicking on the Sign Here field will open the signature box. With this box, there are two different ways for you to provide your signature.

A. ***To write your signature with your cursor,*** click and hold down your left-mouse button inside the signature box and move your cursor to write your name. After you have finished drawing your signature, click the Apply button to apply your signature to the document.
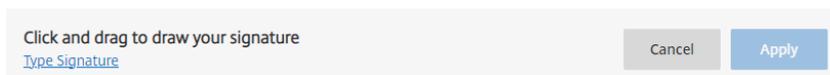
B. ***To type your signature***, click on the Type Signature link in the bottom-left corner of the signature box. This will allow you to type out your signature using your keyboard, rather than drawing it with your cursor. Once you have typed your signature, click the Apply button to apply your signature to the document.

For documents that require multiple signatures, please be sure to repeat this process for each signature box. You can track how many signatures are required on the status bar at the bottom of the document.
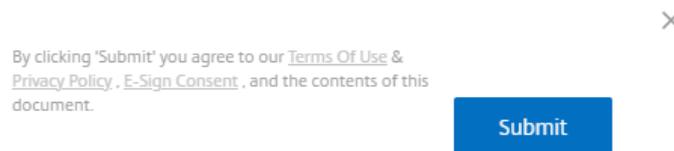

3. Submitting your Signature

Once you have completed every signature box in the document, you will the option to Save Progress or Submit Signature. Clicking on Save Progress will save any signatures you have applied, but WILL NOT send the document back to your accountant. This will allow you additional time to review the document before submitting it. To return the document to your accountant, you must click on the Submit Signature button.

After clicking Submit Signature, you will receive an additional confirmation before it is submitted.

Once you click the Submit button, the document will be sent back to your accountant with your signature.

4. Completion

After submitting your signature, RightSignature will generate a preview of the final document including your signature. Your accountant will automatically receive a notification alerting them to the completed document. Simply close the RightSignature tab in your browser and you're done!