

Checklist

Adobe Acrobat Digital Signature (Certificate) Creation and Use

Helpful Information

- Since the E-SIGN ACT of 2000, electronic signatures have been considered just as legally binding in the US as handwritten signatures. Most countries follow this model; the EU is one exception.
- Digital signatures are a **type** of e-signature that includes a digital certificate issued by a third-party (Adobe) for independent identity validation.
- Digital signatures are the most secure form of e-signature.
- Digital signatures comply with several strict standards for signing agreements between companies doing business in the EU, and in pharmaceutical, medical, and other regulated industries.

Step 1 – Creating Digital Signature(s)

- ☐ Open Adobe Acrobat Pro
 - ☐ Hover over Edit tab
 - ☐ Click on “Preferences”
 - ☐ Under “Categories” menu, choose/click “Signatures” (you may have to scroll to the bottom)
 - ☐ Next to “Identities & Trusted Certificates” click “More” blister box/button
 - ☐ Click “Add ID”, then select “A new digital ID I want to create now”
 - ☐ Click “Next”
 - ☐ Ensure that “New PKCS#12 digital ID file” is selected, then click “Next”
 - ☐ Complete the fields shown
 - ☐ **Do not change these fields: Country/Region, Key Algorithm, or Use digital ID for**
 - ☐ Click “Next”
 - ☐ *You may choose to “Browse” to save your digital certificate in a location on your computer, but this is not necessary. Acrobat will select a file path for you.*
 - ☐ Choose a password for your digital signature that is strong. You may use any combination of letters, numbers, and symbols.
 - ☐ **Note: If you forget your password, you will have to create a new digital signature. There is NO password recovery mechanism.**
 - ☐ **Confirm password (re-enter)**
 - ☐ Click “Finish”
 - ☐ Your new Digital Signature is ready to use

Step 2 (Repeat as needed) – Using your Digital Signature

- ☐ Open Adobe Acrobat document
 - ☐ **IMPORTANT: Make ALL necessary changes to your document BEFORE signing.**
 - ☐ **Caution:** *If any changes are made AFTER the signature is in place, it could invalidate the signature(s)*
 - ☐ Note: The document will display a note at the top indicating any changes that are/were made after signing
 - ☐ Click on “Certificates” in the menu bar on the right side of the screen (this will bring up a new tool bar at the top of the screen)
 - ☐ Note: If you do not have “Certificates” as an option in the menu on the right, take the following additional steps to add this option to your menu:

- ☐ Select "Tools" at the upper left portion of your screen
- ☐ Locate "Certificates" and click "Add"
- ☐ Select "Digitally Sign" and follow the instructions in the pop-up windows which include:
 - ☐ *"Using your mouse, click and drag to draw the area where you would like the signature to appear. Once you finish dragging out the desired area, you will be taken to the next step of the signing process."*
 - ☐ **NOTE:** Ensure that the box you draw is large enough to accommodate your signature and the digital certificate information. The program will alert you if it appears you are creating a signature space that is too small, and will allow you to start over and drag out a larger area for the signature.
- ☐ "Sign with a Digital ID" screen will appear. Choose the Digital ID you wish to use.
- ☐ Select "Continue"
- ☐ In "Sign as [Digital ID Signature Name]", select "Edit" at top right.
- ☐ In "Customize the Signature Appearance" screen, you may type text, draw (using your mouse), insert an image (a .jpg or .png photo file of your handwritten signature) or select "None" to include only the digital certificate information.
 - ☐ **If you select Text:** The image will enter <your common name here>, which will appear as a text/typed version of your name.
 - ☐ **If you select Draw:** A blank screen will open where you can use your finger on your track pad, or a mouse, to draw your signature.
 - ☐ Click "Clear" to redo
 - ☐ Click "Cancel" to back out of the screen
 - ☐ Click "Apply" to accept your drawn signature
 - ☐ **If you select "Image":** A "Browse" hyperlink will appear at the bottom right of the digital certificate. Use this to find the .jpg or .png file you have saved of your handwritten signature.
 - ☐ **If you select "None":** The digital certificate will be used without any additional features.
- ☐ When your digital signature is configured the way you like, click "Save"
 - ☐ *At this point, you may choose to "Lock" the document after signing (at which point NO changes can be made)*
 - ☐ *You may review the document by clicking the "Review" blister button. If selected, Acrobat will alert you regarding whether the document contains any content that may affect its visual integrity.*
- ☐ In the red box on the bottom left corner of the window, enter the Digital ID PIN or Password you assigned when creating your Digital Signature.
- ☐ Click "Sign"
 - ☐ A new window will pop up, prompting you to save the document with a new file name.
 - ☐ Navigate to the location on your computer that you wish to save the signed document.
 - ☐ Rename the document with an appropriate name that identifies it as a SIGNED document.
 - ☐ Click "Save"