

## 3.4 Managing Signatures Created with Adobe Sign

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## ***Adobe Sign Overview***

**Adobe Sign** is a software suite separate from Adobe Acrobat that allows an individual or organization to facilitate signature processes for an Agreement. A central component of Adobe Sign is a specific type of electronic signature, the 'Digital Signature'. Digital Signatures provide a way for users to electronically sign PDF documents with added security measures. They use security certificates in the form of a user-created 'Digital ID' that is unique to the signer and their PC. As an added security measure, the placement of Digital Signatures locks all content, annotations and metadata on the signed PDF. This process creates challenges for maintaining the document's WCAG compliance, as the user will have to ensure the document is accessible before and after the document is sent out for signatures with Adobe Sign. To ensure that the PDF is not broken by the signature process, specific preemptive tasks will need to be completed in addition to the standard remediation procedures. Take note that Adobe Sign is separate from Acrobat and only relevant to the remediation process if your organization has incorporated Adobe Sign into both their enterprise license and standard operating procedures. Users who are not subscribed to Adobe Sign features should progress to other modules.

## **Learning Adobe Sign**

Procedures explained in this module only involve aspects of Adobe Sign related to accessibility. In other words, as Agreements are locked during their signing process, the sole focus for maintaining compliance will be on the pre-signing document procedures. If you are the sender of a document requiring multiple Digital Signatures, further information on Adobe Sign features can be accessed through Adobe support or the instructional materials provided by your organization.

## ***Pre-Signing Document Procedures***

### **Adding Form Inputs**

Form inputs can be added separate from Acrobat in an Adobe Sign window. However, to maximize editing capabilities, the author or sender of an Agreement should organize most form fields with Adobe Acrobat's **Prepare Form** tool. These include each signer's designated Digital Signature field and all other fields excluding those for standard e-signatures or initials. Fields for these standard electronic signatures are usually placed and assigned by the document sender through the Adobe Sign interface.

### **Formatting an Accessible Agreement**

Once a Digital Signature has been applied to an Agreement, the document will be locked from all editing capabilities. It is therefore important to reference Acrobat's **Accessibility Checker** and resolve all accessibility issues prior to sending the Agreement for signatures. Fixing the automatically flagged accessibility issues, however, will not completely proof the document. After the document is signed and returned, **Accessibility Checker** may flag issues related to tooltips and checkboxes, which can only be avoided by specific pre-signature formatting procedures. Further, a couple flagged accessibility failures will be unavoidable for Adobe Sign documents. Let's examine what can be done to minimize these failures, and which failures will need to be left as rare exceptions.

#### ***Add Signature Tooltips***

**Accessibility Checker** will flag and fail signature form fields without 'Tooltip' descriptions only after an Agreement has been signed and locked.

The Solution: Avoid these accessibility failures by accessing each field's 'Properties' menu, adding a relevant tooltip and selecting 'Close' to save it. Alternative to closing the 'Properties' window, the

user can double-click the next form field. This action will save the previous tooltip and allow the user to add tooltips to each field in quick succession. Take note that after checking each Digital Signature field for tooltips and progressing on to the Adobe Sign 'Request Signatures' process, standard e-signature and initial fields will also need to be assigned tooltips as they are arranged in the Adobe Sign interface. Again, details on assigning tooltips and other form field properties in Adobe Sign are not featured in the Adobe Acrobat Accessibility Guide but can be referenced through Adobe support or other instructional material.

### *Avoid Checkboxes*

If checkboxes are present in a form that will be used in an Adobe Sign process, their inputs cannot be interpreted by Adobe Acrobat or a screenreader after the Agreement is signed and locked. When reviewing a signed Agreement, **Accessibility Checker** will fail marked checkboxes for 'Character encoding'. In other words, these checkboxes are not accessible because the X's or other symbols placed within them cannot be encoded into the document as a recognizable character.

The Solution: Avoid placing checkboxes with Acrobat's **Prepare Form** tool.

1. Use **Prepare Form** to add a checkbox sized 'Text field' in place of an actual checkbox field. Use the on-screen scaling controls to adjust its size and shape.
2. Right-click the field and open 'Properties'. In the 'Text Field Properties' 'Appearance' tab, select within the 'Border Color' box and set the color from invisible to black. This will give the text field a visible border to resemble the checkbox. In the 'Options' tab, open the 'Alignment' dropdown menu and select 'Center' to ensure inputs are centered in the checkbox.
3. Close **Prepare Form** and enter an alphanumeric 'X' in the text field if the checkbox is meant to be filled out. The checkbox can alternatively be left blank.

The automatic character encoding that later occurs in the PDF signature process will now identify a recognizable character in the checkbox without breaking accessibility.

### **Accessibility Exceptions**

Not all post-signature issues flagged by **Accessibility Checker** will be avoidable. The Adobe Sign 'Request Signatures' process creates 'annotations' to designate and assign form fields to recipients of the Agreement. As accessibility guidelines require annotations to be hidden and removed from the tag structure, **Accessibility Checker** will fail the signed Agreement for two criteria: 'Tagged annotations' and 'Tagged form fields'. These must be left as exceptions to an otherwise fully accessible, signed Agreement. While annotations normally contain extraneous information, they can justifiably be left in the document as they contain the time stamp and Digital ID info for each signature. Likewise, while a failed 'Tagged form fields' test usually indicates the document form inputs cannot be read with assistive technology, in this specific case, they can be. During an Adobe Sign 'Request Signature' process, all form inputs are converted into annotations that are only visible from the Content panel. This allows Adobe to lock the agreement while simultaneously permitting form inputs to be filled out by designated users. To maintain the readability of the document, these annotations are linked back to object reference tags for each form field in the tag tree. Essentially, an Adobe Sign document will retain accessibility in every practical sense despite the presence of annotations and the absence of properly tagged form fields. Keep in mind that an Adobe Sign Agreement with these exceptions can only be considered as accessible if, prior to a 'Request Signature' process, the document is fully accessible and all 'Pre-Signing Document Procedures' have been carried out to prevent what errors are avoidable.

**Conclusion**

In this module, we've reviewed Adobe Sign Digital Signatures and examined how the Adobe Sign feature has bearing on accessibility. While not all accessibility issues can be avoided during a signature process, we've seen that they can be minimized to a couple exceptions. In the next module, we'll cover common PDF header and footer issues encountered during the PDF remediation process.