



## Standards for Electronic Approval While Working Remotely

Please be advised that as we work remotely, we are requiring an approved electronic stamp signature (“certification”) from Adobe or an email from the **approver’s Lakehead email** stating explicitly that they approve the attached document, specifying what that document is. For example, regarding an invoice, the email from the approver must state that “the attached payment request is APPROVED.”

If a form/document is approved with an Adobe certification stamp (not an Adobe signature stamp or a pasted screenshot of a signature), the document can be emailed to the specific Financial Services’ department, as outlined on the Financial Services website, by an administrative assistant.

Emailed approvals (where the approval is written out in an email) will only be accepted if sent by the person approving.

The person who is authorized to approve can be found on the [Signing Authority List](#), which specifies the individuals who can sign and up to what amount for various budget codes. Please see the [Approval Authority Policy](#) for details regarding signing authority limits.

### How to Create a Digital Certification in Adobe

Anyone with Adobe Pro or Adobe Reader can add a digital certification to a PDF document.

*Instructions to create a self-signed Digital ID can be found online.*

### How to Add a Digital Certification to an Adobe document

You will need to ensure that you have created a digital certificate before signing a document. You will only need to set up a digital certification once.

**IMPORTANT:** Once a document has been certified, you cannot edit it or add another signature field; please ensure the document is prepared with all signature form fields **before** anyone certifies the document (see next heading: “What to Do if Your Document Requires Multiple Approvers.”)

#### Adobe Pro

If a form has a signature field, left click the signature field. A popup will appear; select your saved digital ID and click **Continue**. Enter your password in the bottom left field and click **Sign**. A



dialogue will appear asking you to resave what will be the approved document. Click save to save over the current file or rename the file to save the approved document as a new file.

If the document does not have a designated form field, select **Tools > Certificate** (under “Forms & Signatures” menu). On the **Certificates** ribbon at the top of the document, select **Certify (Visible Signature)**. A popup window will appear, stating, “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 steps of the signing process.” Click **Drag New Signature Rectangle**, and follow the instructions just stated. Select your saved Digital ID and click **Continue**. Type your password into the bottom, left-hand box and click **Sign**. A popup will appear asking you to save what will be the signed version of the document.

### Adobe Reader

If a form has a signature field, left click the signature field. A popup will appear; select your saved digital ID and click **Continue**. Enter your password in the bottom left field and click **Sign**. A dialogue will appear asking you to resave what will be the approved document. Click save to save over the current file or rename the file to save the approved document as a new file.

If the document does not have a designated form field, select “Tools” > “Certificate” (under “Forms & Signatures” menu). On the “Certificates” ribbon at the top of the document, select “Digitally Sign.” A popup window will appear, stating, “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 steps of the signing process.” Click “Drag New Signature Rectangle,” and follow the instructions just stated. Select your saved Digital ID and click “Continue.” Type your password into the bottom, left-hand box and click “Sign.” A popup will appear asking you to save what will be the signed version of the document.

A sample of what the certificate ID looks like is below:

Dianne  
Cataldo

Digitally signed by  
Dianne Cataldo  
Date: 2020.03.19  
11:55:17 -0400



## What to Do if Your Document Requires Multiple Approvers

**IMPORTANT:** Your document may require multiple signatures, such as approvals from multiple departments (e.g. Electronic Staff Form), or multiple budget authorities (e.g. Cheque Requisition Form).

**If your form requires multiple certifications, you need to include form fields to the document BEFORE the first approver adds their certification. Adobe will not allow you to edit a form to add additional signature fields once a document is certified.**

If you have a document that that requires multiple certifications and you would like to add the needed form fields, you can do so in Adobe Pro, under **Tools > Prepare Form >** removing any existing fields (if needed) and adding a **Signature Field** as many times as needed.

Most online forms already have the required form fields built into the PDF, including the [Electronic Staff Form](#), found on the Human Resources webpage, and the [Cheque Requisition](#) form.

If you have to provide additional documentation to a form, such as a cheque requisition and the corresponding receipt/invoice

Please ensure to merge the form and backup documentation together in one PDF document **BEFORE** any certifications are added because we cannot edit a certified PDF and Financial Services will need to be able to save all items together. To do so, in Adobe Pro, click **File > Create > Combine Files into a Single PDF**, and then select your files from your system.