Receiving a document for signature

18/11/2026 4:22 pm GMT

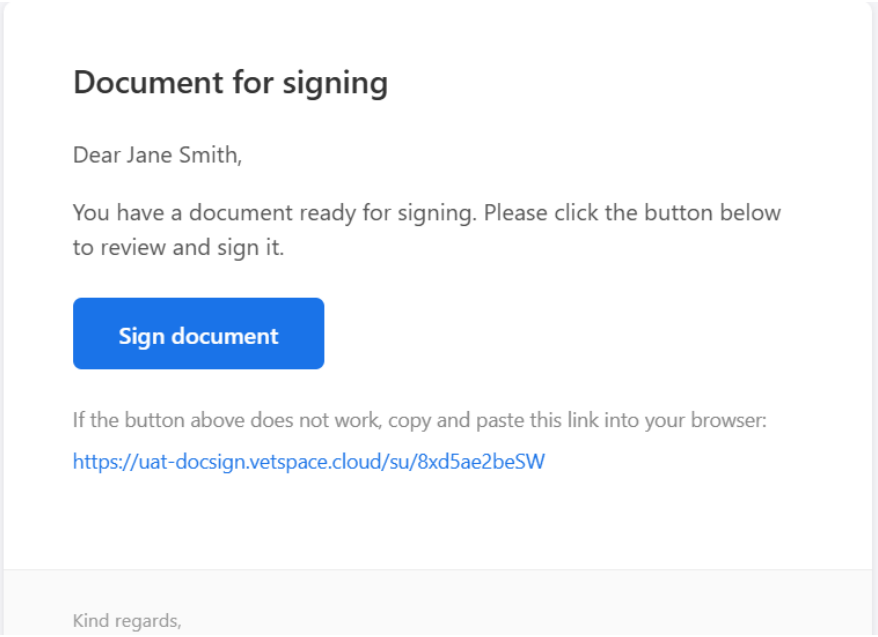
Summary

This page explains what clients can expect to see when they receive an electronic signature request from the practice.

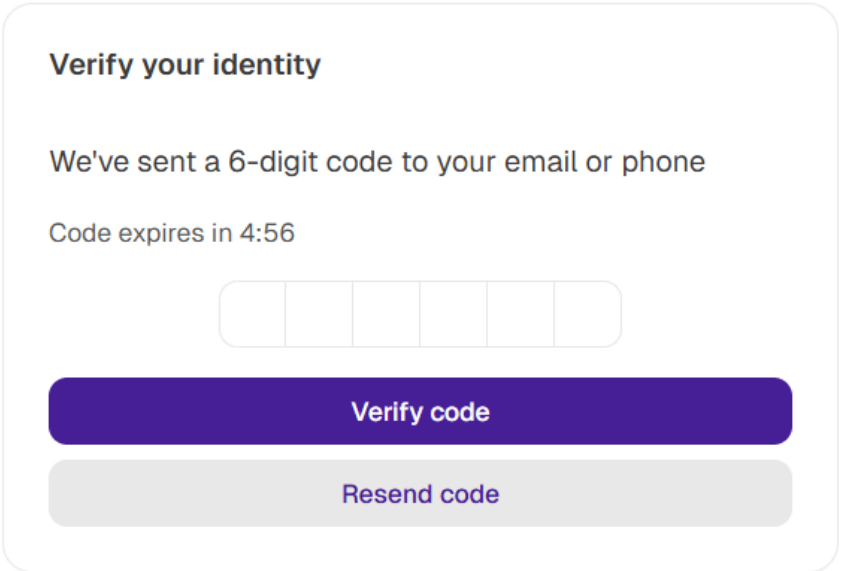
Process

1. The client will receive an email containing a request to electronically sign a document.

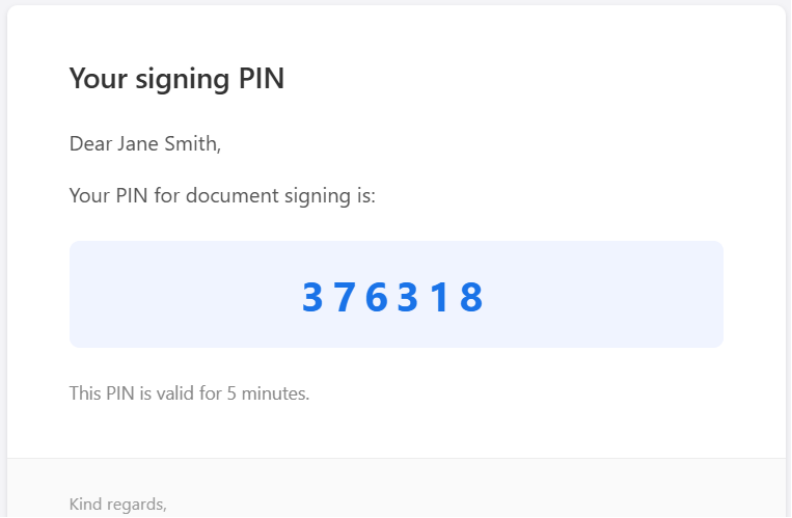
2. The client should select Sign Document.



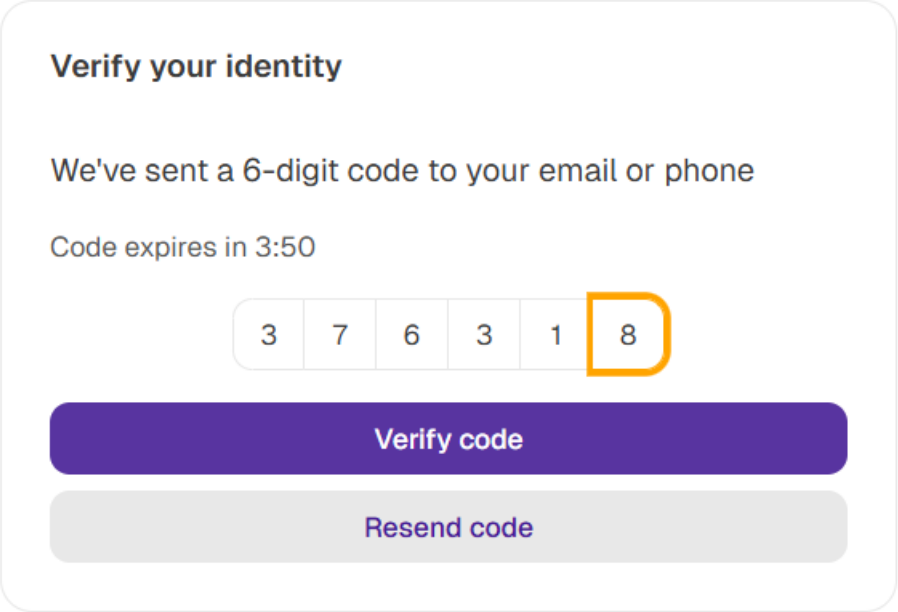
3. A six-digit verification code will be sent to the client's email address.



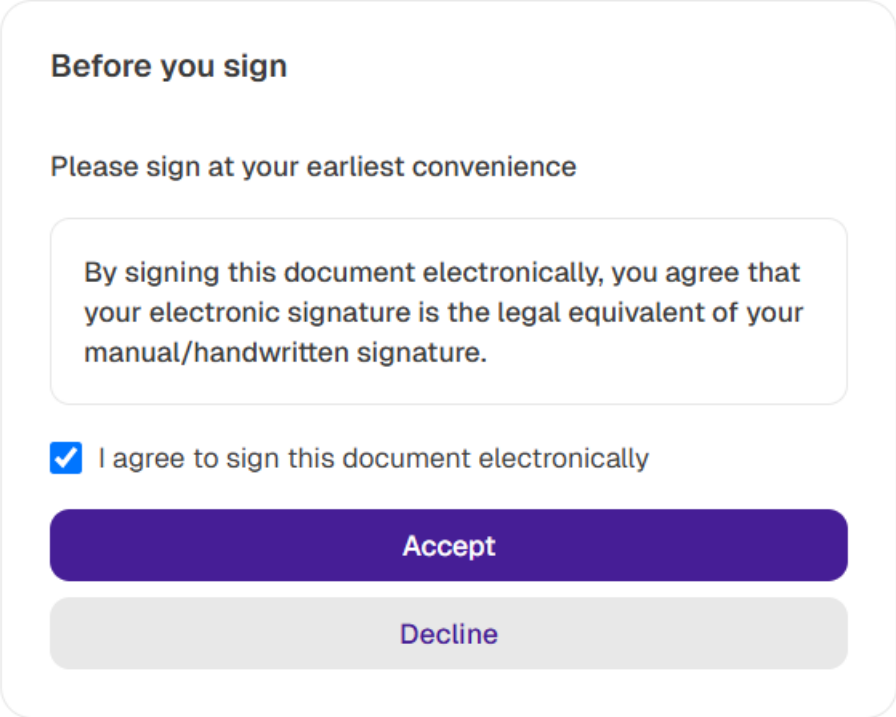
4. The client should copy the verification code from the email.



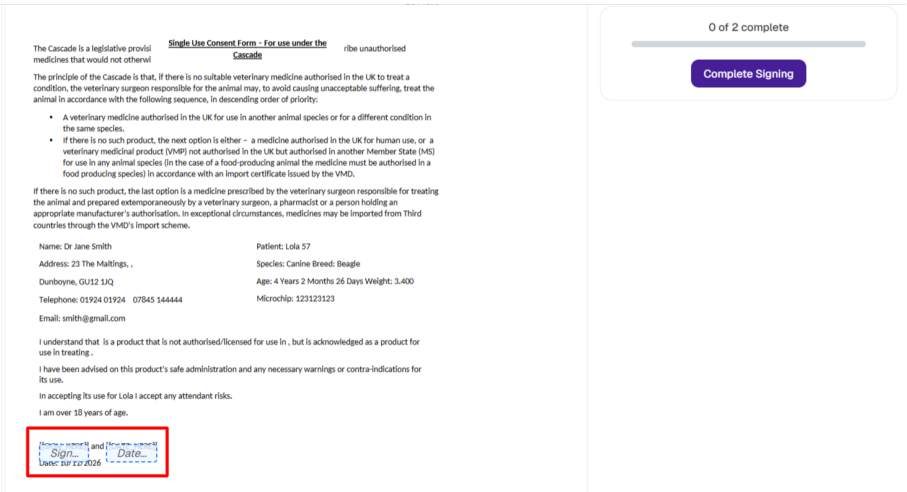
5. Return to the signing page, enter the code, and select Verify Code.



6. The client must confirm their agreement to sign the document electronically by selecting the relevant checkbox, then click Accept.



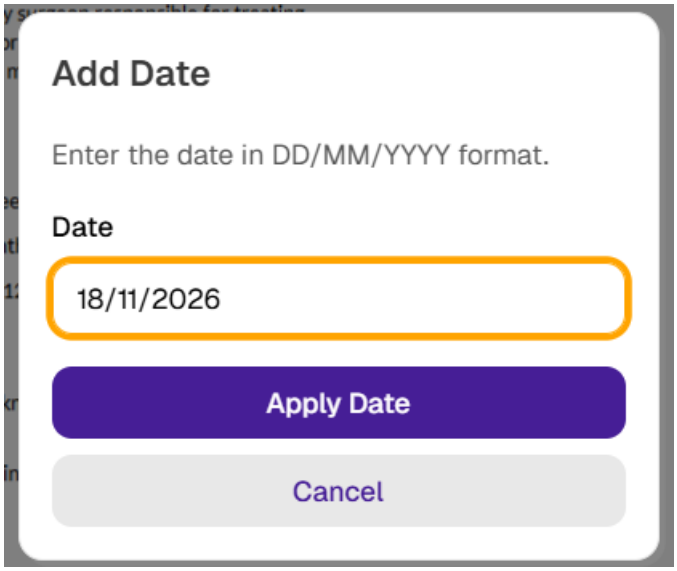
7. A preview of the document will be displayed. The client should select the Sign and Date fields within the document.



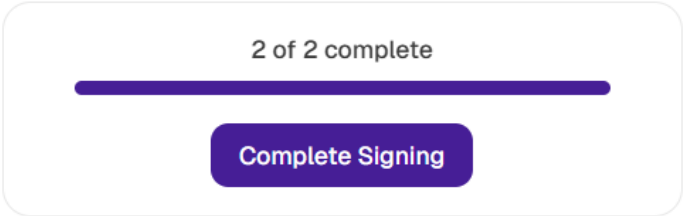
8. The client should enter their name and select Apply Signature.



9. The client should enter the date and select Apply Date.



10. Once all required fields have been completed, the client can select Complete Signing.



11. A confirmation window will appear to confirm that the document has been successfully signed.



Signing complete

Your document has been signed and submitted successfully. You can now close this window.