DIGITAL SIGNATURE DEPLOYMENT
Checklist

notarius

Enrollment

- [ ] **1. Identify personnel members within the organization who will obtain a digital signature**

- [ ] **2. Identify key contacts**
  - Main corporate contact
  - Technical contact
  - Billing contact
  - HR contact (AVA) (optional)

- [ ] **3. Fill out billing account form**
  - General organization information
    - Organization name
    - Address
    - Account name (if different)
    - email domain(s)
  - Key contacts
  - Government information
    - GST
    - Provincial
    - Public Registry (optional)

- [ ] **4. Evaluate needs of organization in relation to training and deployment efforts**

- [ ] **5. Schedule information session online between Notarius and identified personnel (optional)**
  - Presentation of CertifiO Suite
  - Demonstration on how to use digital signature
  - Procedure for identity vetting
  - Installation guidelines
  - Next Steps
  - Q&A

- [ ] **6. Schedule a call with technical team to install the CertifiO Suite for all workstations requiring the software (optional)**
  - Technical team gets an evaluation certificate and performs primary tests on a corporate computer
    - Test installation of CertifiO Suite
    - Test activation of digital certificate
    - Test sign a document
  - **Install CertifiO Suite** per workstation or network deployment Suite is composed of: ConsignO **-** PDF995 **-** Entrust EESP
  - Require administrative rights on workstation
  - Meet minimum technical requirements

- [ ] **7. Individual applicants fill out online form to request digital certificate**

Identity Vetting

- [ ] **8. Personnel schedules a meeting with Notarius for face to face vetting to confirm identity of applicant**

- [ ] **9. Present 2 pieces of valid government ID**

- [ ] **10. Once completed, information is sent to association or HR AVA for review and administrative validation**

Approval

- [ ] **11. Association or Employer approves digital certificate request**
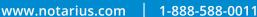
Activation

- [ ] **12. Email sent to applicant outlining next steps to retrieve digital certificate**

- [ ] **13. Complete activation of digital certificate**

Configuration of ConsignO

- [ ] **14. Download signature template document found in ConsignO to prepare images of handwritten signature/seal**

- [ ] **15. Scan document of image containing handwritten signature/seal and initials**

- [ ] **16. Configure images in ConsignO Preferences**

- [ ] **17. Sign a test PDF document to confirm digital signature workflow is functional**

- [ ] **18. Visit Notarius website to watch training videos or participate in ConsignO live training webinars**

- [ ] **19. Configure Adobe Reader to automatically validate Notarius digital certificates**

- [ ] **20. Start digitally signing documents!**

? **For more information**
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Legally reliable documents.