

# Data Exchange – External Partners Applying a Digital Signature to a PDF

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**DISCLAIMER: SSA includes the following instructions for using Adobe, and disclaims any liability caused by your use of this product.**

**IMPORTANT:** Before beginning this tutorial, make sure that the document you are digitally signing is in **PDF format**.

## A. Purpose

This procedure establishes the necessary steps for using Adobe Reader or Acrobat Pro to apply a certificate-based digital signature to a PDF with a pre-placed signature box.

This is a general guide only. Not every agency will have the same screens, errors, or method for applying a digital signature to a PDF. If your agency already provided instructions for applying a digital signature to a PDF, you should follow your agency provided instructions.

## B. Applicability

This document establishes the necessary steps for using Adobe Reader or Acrobat Pro to apply a certificate-based digital signature to a data exchange business document PDF or a scanned PDF document with approved digital signature use.

## C. Requirements

Resources required to complete this procedure include:

- Adobe software.
- The document to be signed in PDF form saved locally on the computer.
- A digital certificate for identity verification or Smart Card.

## D. Procedure for Signing a PDF Document without credential (PIV card)

1. Open the PDF file with Adobe.

2. Find the function labeled “Certificate”



- i. Click on the “Certificate” option on the right side panel and a popup box will give you direction to create your signature space. **Note:** Be sure to scroll down to the space you would like your signature to display.

**Note:** In previous versions the “Certificate” function was found under other functions such as “Fill & Sign”, however in more recent versions of Adobe, you may find the “Certificate”

function as a standalone option. If you do not see the “Certificate” function, please check under other functions such as “Fill & Sign”.

3. Scroll down through the document to the signature line or where the signature is desired (i.e. – Authorized Signatures and Dates), click and hold the left mouse button, and drag the cursor at an angle away from your starting point.

**NOTE:** The rectangular box should measure out to be the same space of the signature line so that the signature will be an adequate size and is readable.


**Authorized Signature**

The signatories below warrant and represent that they have the competent authority on behalf of their respective entities to enter into the obligations set forth in this agreement.

**Electronic Signature Acknowledgement:** By clicking the [SIGN] button, you are signing the document electronically. You agree that your electronic signature has the same legal validity and effect as your handwritten signature on the document, and that it has the same meaning as your handwritten signature.

**Social Security Administration**

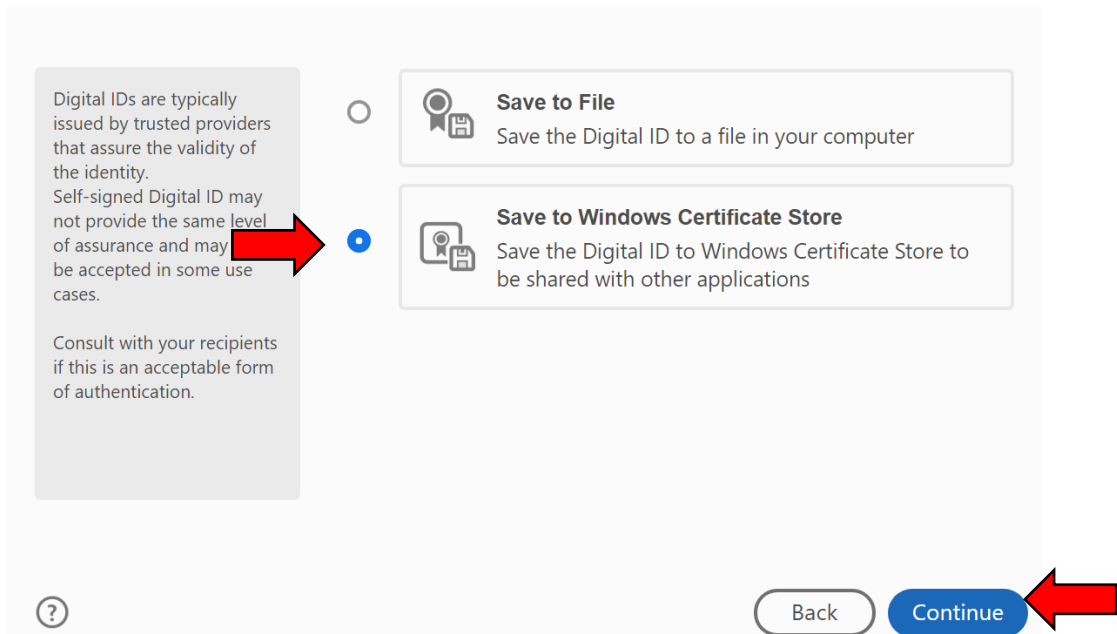
John Doe  
Deputy Commissioner for Nothing



4. A pop-up window will appear. If the “Sign with a digital ID” drop down is not already populated with your signature, choose “Configure New Digital ID”.



5. Choose “Save to Windows Certificate Store”, so that the digital ID you create will be available the next time you need to sign a document. Once you create this digital ID, you can reuse it on future documents.



- You will create your digital ID by filling in Name, Organization Unit, Organization Name and email address. Press “Save” when you have completed the information for you and your organization.

Enter the identity information to be used for creating the self-signed Digital ID.

Digital IDs that are self-signed by individuals do not provide the assurance that the identity information is valid. For this reason they may not be accepted in some use cases.

Name: John Doe

Organizational Unit: *Enter Organizational Unit...*

Organization Name: *Enter Organization Name...*

Email Address: JohnDoe@Organization.com

Country/Region: US - UNITED STATES

Key Algorithm: 2048-bit RSA

Use Digital ID for: Digital Signatures

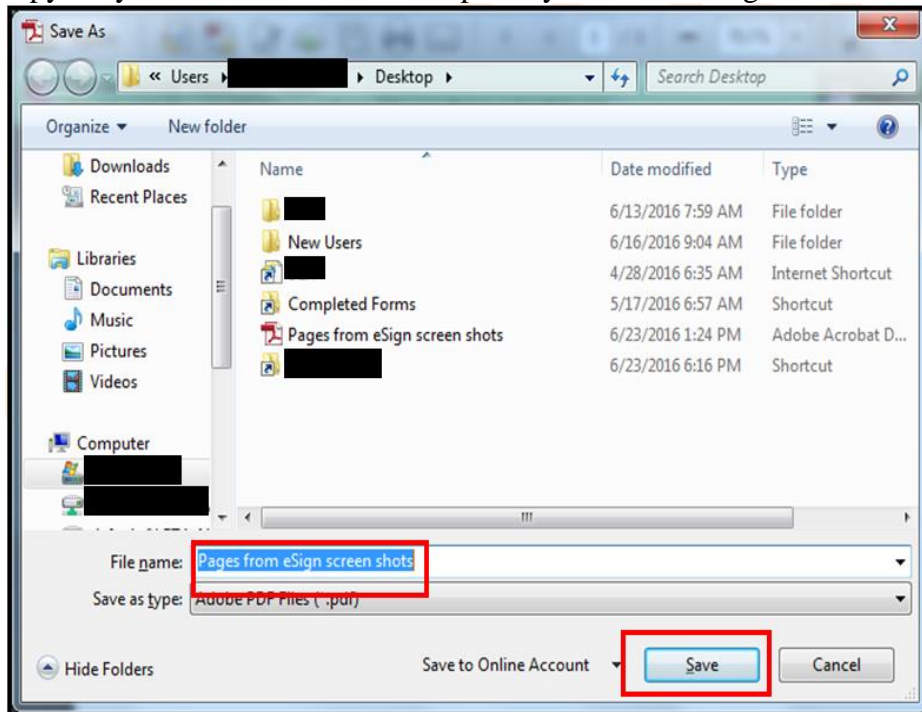
Back Save

- Preview your Digital ID. If the Digital ID appears correct, then click “Sign”. This will append your Digital ID to the place you have chosen in step #4.



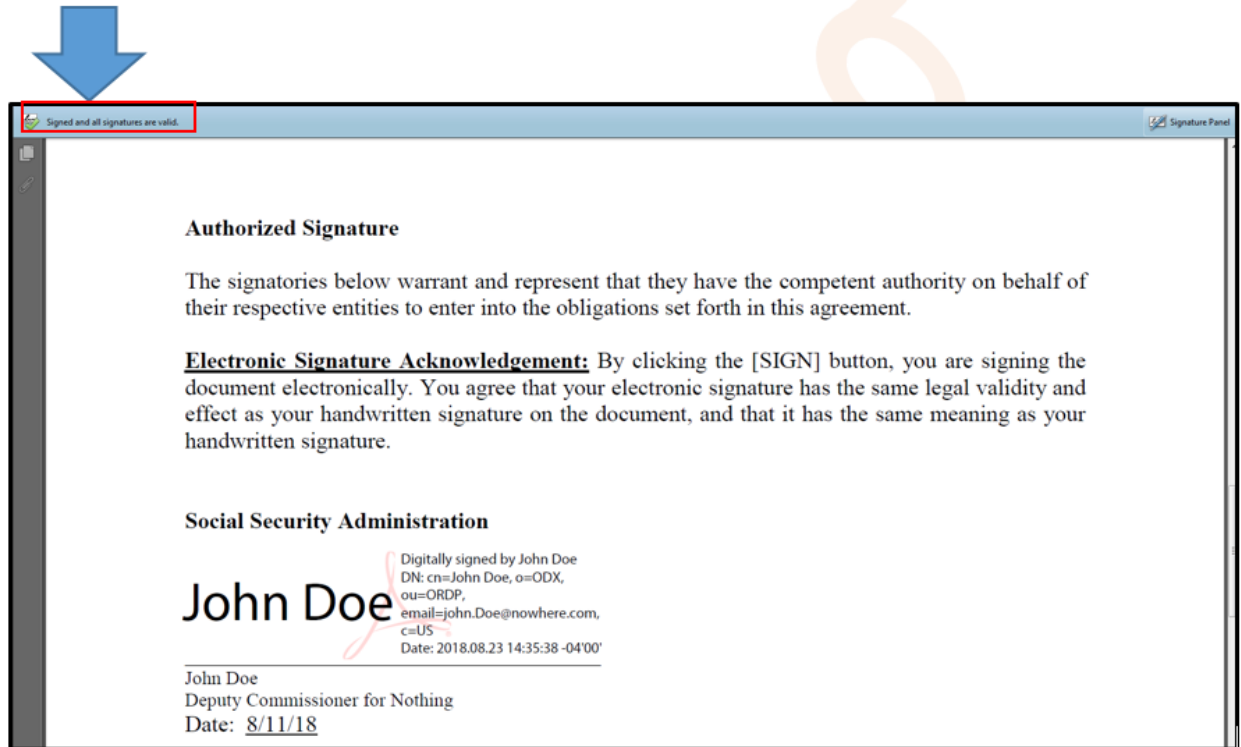
**Note:** The signature appearance will look similar to the example below.

8. Verify the displayed information is correct. Click “Sign.”
9. The system will prompt you to save the document. You can save the document with its current name or rename the document. Save the document. **Note:** This is important so that you will have a copy for your records to have the capability to share the signed document.



**NOTE:** When all signatures are valid, a message will display that the document is “Signed and all signatures are valid.” (Refer to example below.) The “Signed and all signatures are valid” may not always appear. If your digital signature still appears in place of the rectangle, you may proceed.

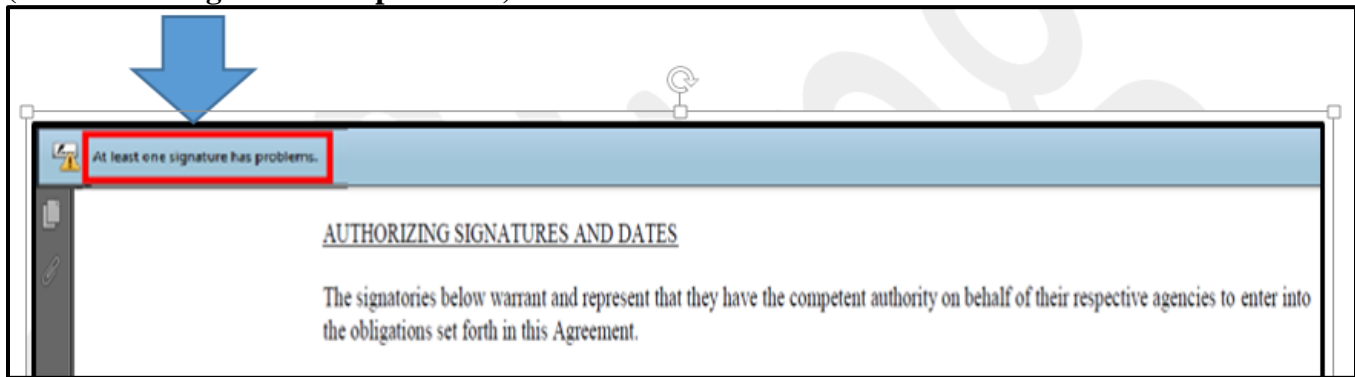
**(Signed and all signatures are valid)**



14. When the document is signed and all signatures are valid, you are now able to share your saved document.

**NOTE:** If there are problems with at least one signature, a message will display reading “At least one signature has problems.” (Refer to example below.) If this happens with your signature, you should try electronically signing again or correct the issues before sending to the requestor. Otherwise, the signature will not be considered valid, and you must electronically sign again beginning with **step #1**.

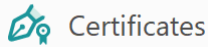
(At least one signature has problems)



## E. Procedure for Signing a PDF Document with credential (PIV card)

1. Insert your Smart Card credential into the card reader.
2. Open the PDF file with Adobe.

3. Find the function labeled “Certificate”



- i. Click on the “Certificate” option on the right side panel and a popup box will give you direction to create your signature space. **Note:** Be sure to scroll down to the space you would like your signature to display.

**Note:** In previous versions the “Certificate” function was found under other functions such as “Fill & Sign”, however in more recent versions of Adobe, you may find the “Certificate” function as a standalone option. If you do not see the “Certificate” function, please check under other functions such as “Fill & Sign”.

4. Scroll down through the document to the signature line or where the signature is desired (i.e. – Authorized Signatures and Dates), click and hold the left mouse button, and drag the cursor at an angle away from your starting point.


**NOTE:** The rectangular box should measure out to be the same space of the signature line so that the signature will be an adequate size and is readable.

**Authorized Signature**

The signatories below warrant and represent that they have the competent authority on behalf of their respective entities to enter into the obligations set forth in this agreement.

**Electronic Signature Acknowledgement:** By clicking the [SIGN] button, you are signing the document electronically. You agree that your electronic signature has the same legal validity and effect as your handwritten signature on the document, and that it has the same meaning as your handwritten signature.

**Social Security Administration**



John Doe  
Deputy Commissioner for Nothing

- a. Verify the displayed information is correct. Click “Sign.”

**John Doe**  Digitally signed by John Doe  
Date: 2020.04.15 14:43:10 -04'00'

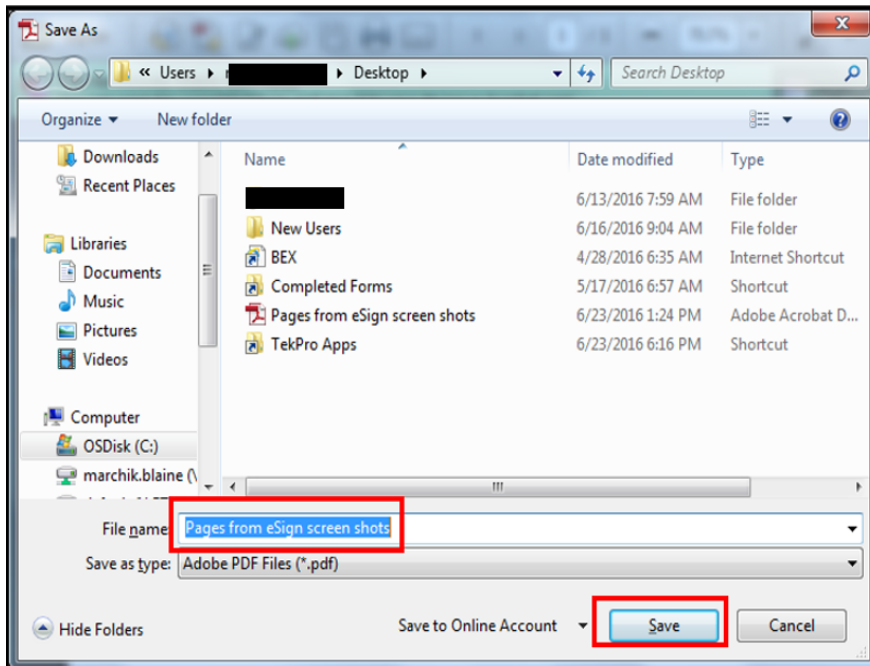
Lock document after signing [View Certificate Details](#)

Review document content that may affect signing Review

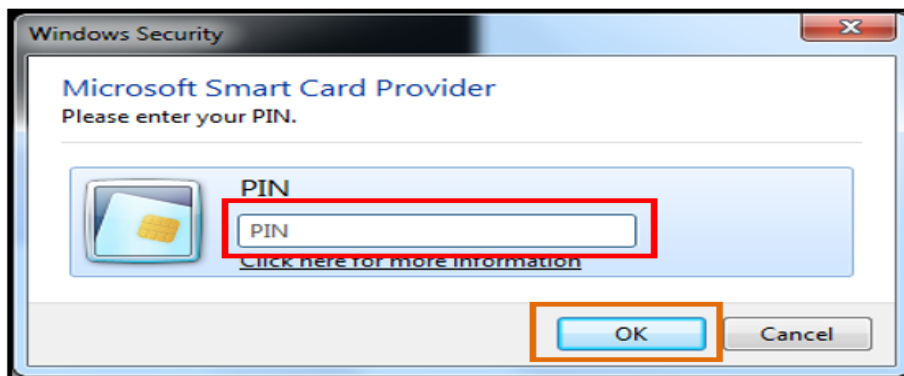
Back Sign

- b. The system will prompt you to save the document. You can save the document with its current name or rename the document. Save the document. **Note:** This is important so that you will have a copy for your records and have the capability to share the signed document.





- c. A new pop-up window will appear prompting you to enter the PIN associated with your Smart Card credential. Enter the PIN and select “OK.”

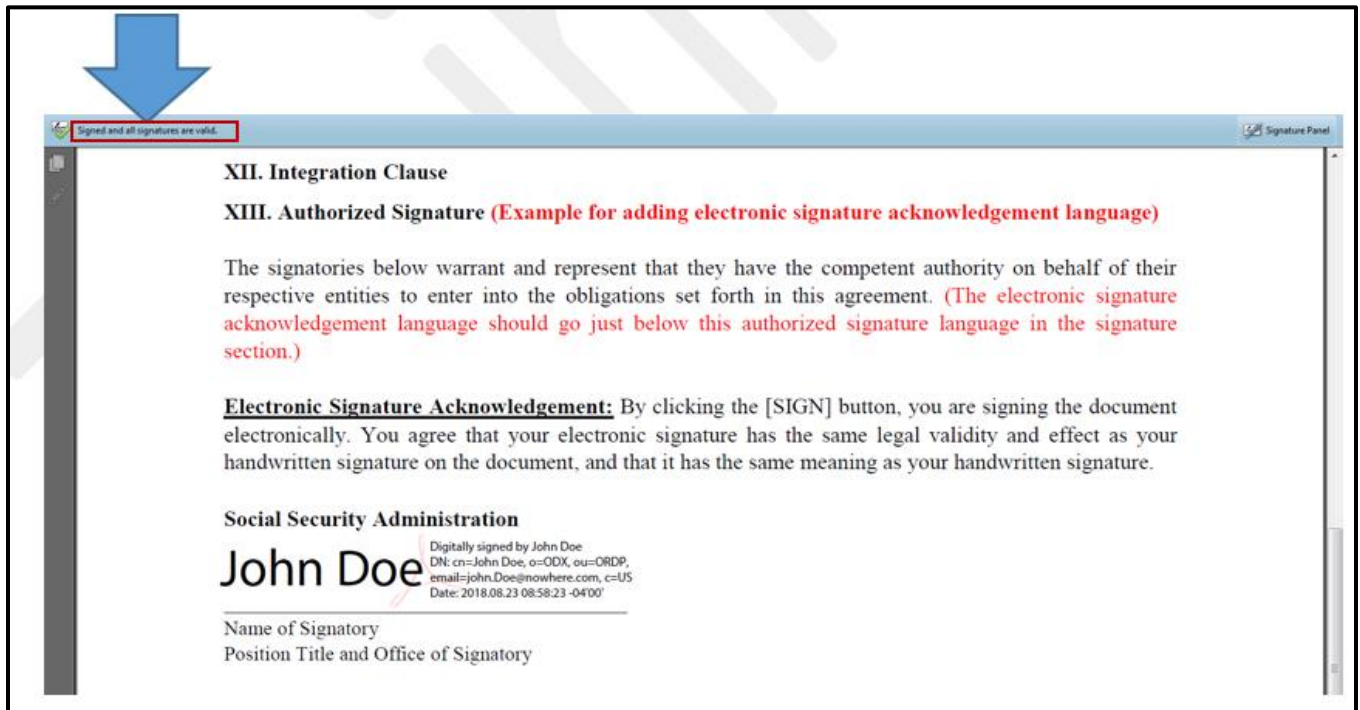


- d. After entering your PIN, the digital signature will appear in place of the rectangle.

When all signatures are valid, a message will display that the document is “Signed and all signatures are valid.” (Refer to example below.)

**NOTE:** The “Signed and all signatures are valid” may not always appear. If your digital signature still appears in place of the rectangle, you may proceed.

**(Signed and all signatures are valid)**



- e. When you sign the document and all signatures are valid, save the signed document and return to the requestor.

**NOTE:** If there are **problems** with at least one signature, a message will display reading “At least one signature has problems.” (Refer to example below.)

If this happens with your signature, you should ensure to correct the issues before sending to the requestor. Otherwise, the signature will not be considered valid and you must electronically sign again beginning with **step #1**.

**(At least one signature has problems)**

