

Electronic Signatures in Class Q & A

No	Question	Answer
1	How does DocuSign go with date sensitive documents such as Notice of Intent to Claim and pension documentation which a lot of the time is signed retrospectively?	You can add in a text field and manually input the date you want to show. However, this will not reflect in the Certificate of Completion. The Certificate will show the date the document was signed. Unfortunately, there is no way to backdate the Certificate of Completion document.
2	There are a number of documents that cannot be electronically signed. How does DocuSign support that?	Documents that need to be physically sign can continue to be signed in that way and the DocuSign solution can be used for documents that support electronic signatures.
3	Can you elaborate on what other documents CANNOT be electronically signed?	<p>The electronic signature supported document as below:</p> <p>https://support.class.com.au/hc/en-au/articles/360002738016-Electronic-Signature-Supported-Documents</p> <p>The ATO has always taken a pragmatic approach to digital and electronic signatures technology. As a registered Tax Agent, you can virtually deal with the ATO, sign off all declarations, returns, forms, elections, reports, minutes, or resolutions electronically via its online services or approved digital software providers such as Class.</p> <p>We are also aware of certain legal documents and trust deeds cannot be digitally signed due to witnessing requirements, they are not part of existing documents</p>

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		offered in Class. For more information, please refer to the NowInfinity Help Centre .
4	Is there a cost involved? If so, how much?	There is a trial period where all customers can sign up for a pilot until 31 January 2022. After this date the pricing will be \$1.50 + GST per entity per month.
5	Can you pick & choose as to which clients you use this for or is it 1 in all in?	There is no option to choose which entity opt in for electronic signatures, pricing will be based on all the entities and businesses covered by the contract.
6	Does each member need a separate email address?	Whilst it is preferred that each member will have a unique e-mail address it is not required. You are able to use the access code to differentiate between members. This code can be provided to the individuals that needs to sign privately e.g. via text message.
7	We currently have an existing DocuSign account, can we use it or do we need to create a new one to link it to Class? do we have limits on the envelope?	Class has opted to integrate with DocuSign using a Class specific DocuSign account. If you want to benefit from the DocuSign integration, e.g. the automatic tagging, you will need to use the Class DocuSign account. There is no direct limit but is subject to the Class fair use policy (https://www.class.com.au/fair-use-policy/).
8	Can you import docs that are external into the package – i.e. a doc that you don't need to save as a Class document.	Yes you can. Once you send a document for signature, in the DocuSign portal you are able to add additional documents.

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9	If you add documents to the envelope, is that possible to arrange it before the combined report?	Yes, you can order it as you wish.
10	How do we know which banks/brokers will accept electronic signatures on feed authorities?	At this stage just Macquarie Bank and HUB24. We are collaborating with other providers to look at rolling this out for other Financial Institutions in the future.
11	We have some older clients still without email or mobiles	Clients will need an e-mail address to be able to use the DocuSign solution. If they don't have one, they will need to continue signing using traditional methods.
12	Currently, we are using another e-Sign tool for all our documents. Will Class use another e-Sign service in the future?	Class has not made any decision at this stage about partnering with another e-Sign provider.
13	Our auditors will not accept our current e-signature solution, is the Class solution approved by auditors?	The signed document will provide the record (signatories, sign time and IP) for audit purpose. Both DocuSign and Class are ISO27001 certified. We have not heard nor anticipate auditors having any issues with the Class e-signature solution.
15	How do you run a report package AND add other single reports to the same signing pack?	In report packages click 'send for signature'. In another tab run a single Class report. You can then add the single report to the report pack in the DocuSign portal. The pre-tagging functionality from the single report will still be visible when you attach the single report to the envelope.

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16	Are we able to add our company branding to the DocuSign email to clients?	Yes, if you navigate to White Labels there is a tab for Electronic Signatures, from here you can configure the branding for the e-mail and the DocuSign portal when signers open the link to sign.
17	Can you send documents without having to use Class reports?	You need to use at least one Class report to send the documents for signature.
19	Are we able to download the signed documents signed by the members but not signed by the tax agent?	You can only download the signed documents once all signers have signed. If you don't want the Tax Agent to sign you can just remove their tag in the DocuSign portal, that way once your members have signed the report pack can be downloaded.
20	The declaration (in our case) is sent out prior to going to audit, but it actually says on the declaration that the trustee has sighted the signed audit report and therefore should be dated after the audit has been completed. How does DocuSign combat that?	<p>Tax return Section K and ELD has 2 signature section: 1) for the Tax Agent and 2) for the trustee; therefore each signee can control which date they sign-off the return.</p> <p>You can control the signing order for the Tax Agent and trustee by ticking the "Set signing order" checkbox and adjust the routing order as needed on DocuSign platform once the envelope is generated.</p>
21	Is there any functionality available where say 2 of 3 of the fund's members want to sign electronically, however the 3rd member would	<p>Step 1 – Ensure that member 3 is not tagged for signing</p> <p>Step 2 – Get member 1 and 2 to sign the documents electronically</p>

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	prefer to print and sign a copy (rather than using DocuSign?)	<p>Step 3 – Once you have the signed document completed print and provide to member 3 to sign</p> <p>Step 4 – Save the electronic audit trail with the physically sign doc of member 3</p>