WORKFORCE DEVELOPMENT
AGING & COMMUNITY SERVICES

CalJOBS Help Sheet 22
Electronic Signatures

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Electronic Signatures in CalJOBS

The Electronic Signature Module provides the ability to add electronic signatures to the Workforce Innovation and Opportunity Act (WIOA) application, Objective Assessment Summary and the Individual Employment Plan, within CalJOBS directly. For other documents requiring signatures, the pDoc Signer software is required.
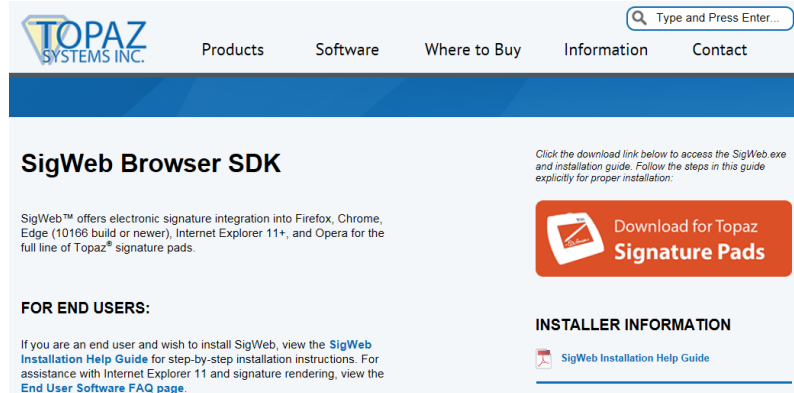
Installing the Required Software

There are three pieces of software you will install first, in order to fully utilize the electronic signature pad:

1. SigWeb Browser SDK
2. SigPlus
3. pDoc Signer

### 1. Install the SigWeb Browser SDK

In this step, an API will need to be installed from Topaz Systems, the maker of the signature pad. The API ensures that you are able to enter signatures within the CalJOBS system. Make sure the user logged in has admin rights to the computer.

1. Remove the blue protective tape from the signature pad and plug in the signature pad to a USB port on your computer.

2. Allow your computer to install drivers. If this is the first time you've plugged in the signature pad, you should see a prompt indicating that your computer is installing the latest drivers.

3. Once the drivers have been installed, go to:
   http://www.topazsystems.com/sigweb.html

4. Click on the **Download for Topaz Signature Pads** button on the right:

5. A set of instructions will appear. Ensure that the instructions are followed appropriately and that you click on the first option; your Topaz signature pad model ends in **"-HSB-R"**.

6. Follow the installer through, making the appropriate choices for your signature pad as you go. You will choose:

    a. T-S
    b. 460
    c. -HSB-R
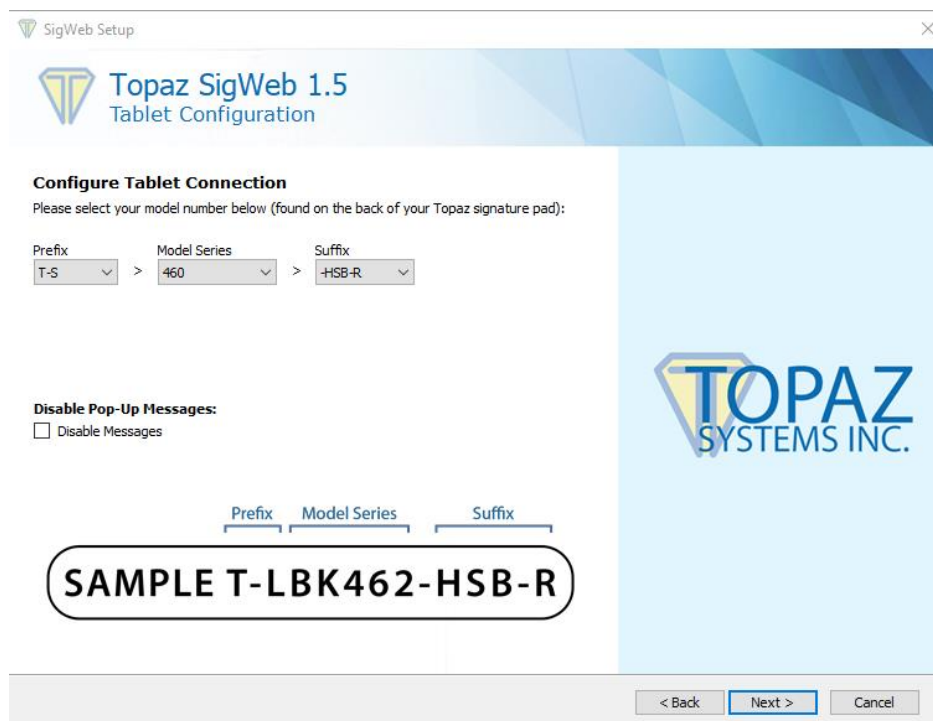
7. Click "**Agree**" on the License Agreement dialogue box that appears and wait for installation.

8. Complete the installation process. After installation, it is advised to restart your computer.

9. After installation, there are a few steps to confirm your signature pad is working correctly.

    a. First, Go to the following Topaz testing site:
    http://www.sigplusweb.com/sigwebtablet_demo.htm

b. Click the "**Sign**" button and sign on the signature pad using the attached stylus. You should see the corresponding electronic signature in the top box of the demo page.

2. Install SigPlus and pDoc Signer

For documents where electronic signatures cannot be added within CalJOBS directly, such as the **Objective Assessment Summaries** and **Basic Skills Assessments**, you will need to download <u>two additional software</u>. Please note that you may need admin rights to the computer in order to install the following:

1. **Topaz SigPlus Software** – This is proprietary software from the maker of the signature pad, which will provide a connection to pDoc Signer.
2. **pDoc Signer** - This is a PDF software, which will allow you to add signatures to any PDF document.

Proceed with the steps below to download the additional software:

1. Go to: http://www.sigpluspro.com/sigplus-index.html

2. Follow Steps 1 and 2 to Download SigPlus and download the pDoc Signer as well.

Required Steps

Download SigPlus®

Step 1
Download the Topaz SigPlus software for use with Topaz signature pad to your computer's desktop. Right-click the icon on the left, select "Save Link As", and choose the desktop as the save location to begin the download.

sigplus

Step 2
Double-click on the SigPlus icon on your desktop (similar to the one on the left) to begin installation. Depending on your security settings, you may need to login to Windows as an "Administrator" to begin the installation, or right-click on the SigPlus icon and select "Run as administrator".

When prompted, select "Yes" to place the Topaz test utility DemoOCX on your desktop. If needed after installation, SigPlus will be found in your C:\Windows\SigPlus folder.

After installation, test your pad's functionality and proper set-up using DemoOCX. Once functionality is confirmed, proceed with popular downloads below or view Topaz's complete software offerings.

Popular Downloads (Optional)

Download pDoc Signer   **Download**   **Download**

After you have successfully downloaded the **SigWeb Browser SDK**, **SigPlus** and **pDoc Signer**, you are ready to use your electronic signature Pad both within and outside of CalJOBS.

Adding Signatures

After successfully installing all three related software, you will be able to:
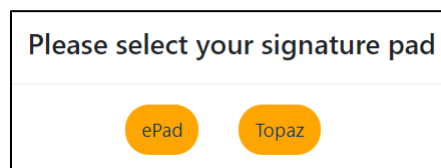
1. Add a staff signature.
2. Add a participant signature to a WIOA application.
3. Add an application reviewer signature using pDoc Signer.
4. Add a participant signature to an Individual Employment Plan.
5. Use pDoc Signer to add signatures to any other PDF documents.

1. Add a Staff Signature

1. Log into CalJOBS and go to **My Staff Workspace > My Staff Account.**
2. Scroll down to the bottom of the page and a new section **Staff Signature** should be displayed.
3. Click on "**Create With Signature Pad**". You can also click on "**Create Digital Signature"** to sign with your mouse, and skip the following steps.

Staff Signature

Create Digital Signature

Create With Signature Pad

Remove My Signature
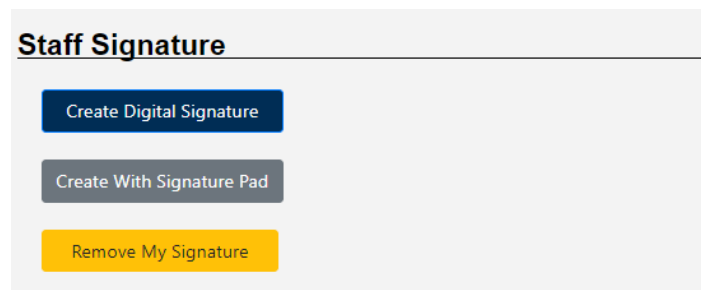
4. Click on the "**Topaz**" button when prompted.

Please select your signature pad

ePad   Topaz

5. Use the attached stylus and sign the staff signature on the signature pad, and click "**Save**". If you'd like to restart, simply click "**Clear Signature**".

Signature

Clear Signature

Save   Cancel

6. Scroll down on the **My Staff Account** page to ensure the staff signature has been saved. You can always click "**Remove My Signature**", if you'd like to delete the signature or create a new one.

Once you have created the staff signature, it will be available to be included in a WIOA application or Individual Employment Plan Summary.

2. Add a Participant Signature

In this final step, you will add the participant's electronic signature, along with the previously created staff signature, to a completed WIOA application and IEP.

1. Access the participant's case file and go to **Staff Profiles > Case Management Profile > Programs**.
2. Click on the link in the participant's WIOA application.
3. Scroll down to the bottom of the **Eligibility Summary** page and you will see the **Remote Signature** section.
4. Click the "**Capture Signature**" link next to **Applicant Signature**.

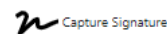If the participant is a Youth, you will also find a **Guardian Signature** option under the **Applicant Signature**:

Applicant Signature: _____ ⌇ Capture Signature

Guardian Signature: _____ ⌇ Capture Signature

5. Choose your **Signature Input Method**.

Select Signature Input Method

| Mouse | Message | Topaz / ePad |

Cancel

6. Similar to adding the staff signature, if you choose Topaz/ePad ask the participant to sign their name, using the signature pad and the attached electronic stylus, then click "**Save**".

Signature

Clear Signature

Save   Cancel

7. To ensure both signatures have been properly added, click the "**Print**" button at the bottom. In the pop-up window, select between the following print options:
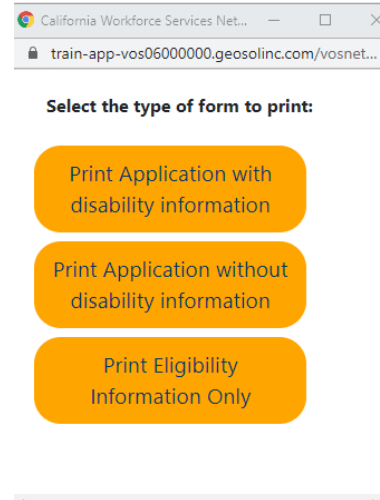
8. When the application opens, scroll all the way down to view the signature page:

9. Click the "**Finish**" button in the WIOA application. The signed WIOA application can be found under the participant's **Documents (Staff)** folder. If a WIOA Application is updated, you can have the participant re-sign, and a new PDF document will be saved:

Clicking "**Edit**" or "**Meta Data**" will allow you to add further details regarding this PDF document.

## 3. Add a reviewer signature to a WIOA application

Once a WIOA application has been saved with the Staff and Participant signature, the application reviewer can add their signature using pDoc Signer. The staff member will provide the Participant's Name and Application ID to the reviewer and the reviewer will access the Participant's case file within CalJOBS.

The following instructions detail how a reviewer will add their signature to the WIOA application.

1. Navigate to the document **WIOA_Application** under the participant's **Documents (Staff)** folder and click the "**Download**" hyperlink to download the application.

Document Name	Document Tags	Category	Modify Date	Action
WIOA_APPLICATION.PDF	App ID:2244250;App Date: 01/07/2020	General	03/06/2020 12:20	View Review Edit Download Meta Data Delete

2. Open the **pDoc Signer** program and open the downloaded WIOA Application using pDoc Signer.

3. Navigate to **Page 3** of the WIOA Application using the navigation tool at the top of the page and click the "**Insert and Sign icon**" to create a signature box.
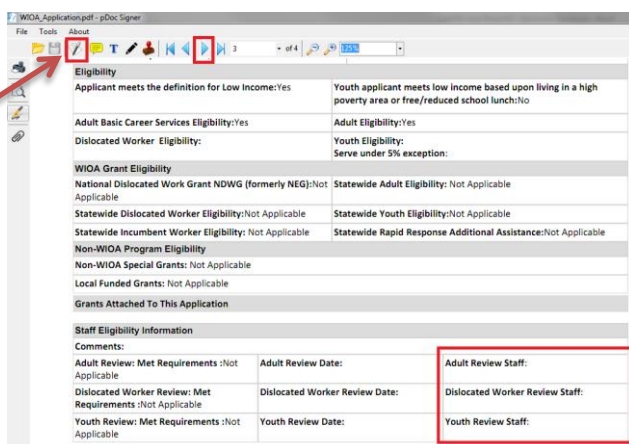
Click the "**Insert and Sign**" icon and create the box at the appropriate Reviewer signature field at the bottom of the page.

4. To create a signature box, click and hold the mouse button and drag the crosshair cursor from the **top left** to the **bottom right** of where you'd like the signature to appear.

5. Once you release the mouse button, a **Signature Capture** page will automatically appear.

6. Sign using the electronic signature pad and attached stylus, then click the **OK** button on the **Signature Capture** page.

7. The **Signature Capture** page will close, and the signature will now appear on the PDF, along with a date and timestamp. The date and time are automatically entered from your computer's date and time.

8. Save the document with the filename **WIOA_Application_Signed** and upload to the participant's **Documents (Staff)** folder in CalJOBS.

4. Add a participant signature to an Individual Employment Plan.

Adding electronic signatures to a completed **Individual Employment Plan** (or **Objective Assessment Summary**) is similar to adding signatures to the WIOA application.

1. Access the participant's case file and go to **Staff Profiles > Case Management Profile > Plan.**
2. Scroll to the **Individual Employment Plan** section, and under the **Action** column, click the "**Display/Print**" link. (For the OAS, click **Edit** instead.)
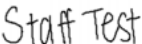
Individual Employment Plan/Service Strategy

#	LWIA/Region	Office Location	Status	# of Goals	Staff	Date	Action
4450	Los Angeles County WDACS	LAO Community and Senior Services	OPEN	2	Staff25, Lao	01/08/2020	Edit Delete Display/Print

Objective Assessment Summary

#	LWIA/Region	Office Location	Program	Staff	Date	Action
2785	Los Angeles County WDACS	LAO Community and Senior Services	Title I - Workforce Development (WIOA)	Staff25, Lao	01/07/2020	Edit Delete Print

3. Scroll down to the bottom of the page and you will see the **Individual Signature** section.

4. Click the "**Applicant Signature**" link.

5. Ask the participant to sign their name, using the signature pad and the attached electronic stylus, then click "**Save**".

6. To ensure both signatures have been properly added, click the "**Print**" button at the bottom. When the application opens, scroll all the way down to view the signature page:

Signature

_____
Applicant Signature

01/24/2020
_____
Date

Staff Test

_____
Staff Signature

01/24/2020
_____
Date

7. Click the "**Return**" button. The PDF of the signed IEP can be found under the participant's **Documents (Staff)** folder.

The IEP is a living document and should be updated. Though it is not mandated, you can choose to have the participant sign an updated version following the same steps above. The updated IEP will be saved as a new PDF document. The original signed IEP will continue to be available and will **not** be replaced by the updated IEP.

5. Using pDoc Signer

For any other documents that need signatures, you will use the pDoc Signer.

1. When presented with the option to Print a form in CalJOBS, click **Print,** but change the **Destination** from an actual printer to **Save as PDF.**

2. Open **pDoc Signer** and open the newly saved PDF. (NOTE: You can open *any* PDF document requiring a signature using pDoc Signer.
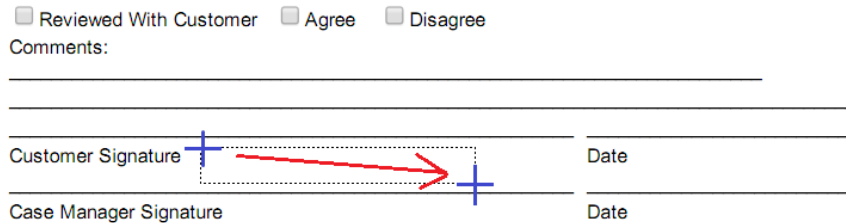
3. Navigate to the appropriate signature page in the document and click the "**Insert and Sign icon**" at the top.

Click to add a signature box.

Draw a box where you would like the signature to appear.
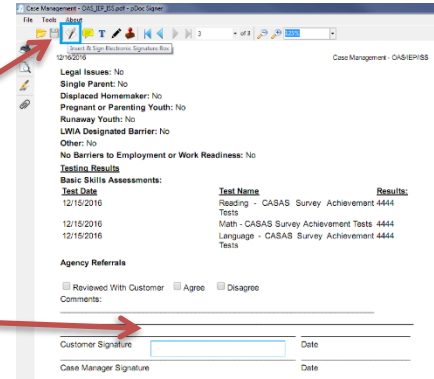
4. To create a signature box, click and hold the mouse button and drag the crosshair cursor from the **top left** to the **bottom right** of where you'd like the signature to appear.

5. Once you release the mouse button, a **Signature Capture** page will automatically appear.

6. Sign using the electronic signature pad and attached stylus, then click the "**OK**" button on the **Signature Capture** page.

7. The **Signature Capture** page will close, and the signature will now appear on the PDF, along with a date and timestamp. The date and time are automatically entered from your computer's date and time.

To change the format of the date and time, go to **Tools > Settings > Date Format**.
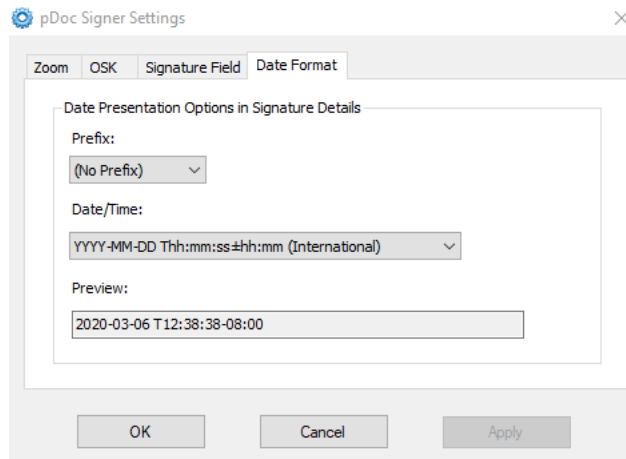
8. Repeat steps 3-7 to add any additional signatures to the PDF.

9. Save the document with an appropriate filename and upload to the participant's **Documents (Staff)** folder in CalJOBS.

Note: Most forms have a specific area or field for signatures. However, for a document like the **Basic Skills Assessment Summary**, you may insert signatures in up to three different locations: