Creating ADA Accessible OneSpan Transactions

The OneSpan Sign portal for eSignature is designed to be ADA accessible. It works with multiple screen readers and magnifier tools. In addition, the signing process for transactions can also be configured to be ADA accessible. However, if the sender needs the signing process to be accessible, they need to create an accessible transaction. The documents in the accessible transaction must be configured so they are accessible before they are uploaded. If the document is ADA accessible before it is signed, it will remain accessible after it is signed. However, accessibility corrections cannot be made after the signing process is completed without invalidating the authenticity of the signatures.

In particular, the data and signature collection fields must be created and tagged in the document prior to uploading them into the accessible transaction. The tool does not allow these fields to be added to the document or modified after it is uploaded into the transaction and some transaction settings for accessible transactions are different than those that are used for regular transactions.

1. **ADA accessible documents in an eSignature transaction must be uploaded as PDF files.**

2. Make sure to use headers, styles, address paragraph spacing, include alternate text for graphics, etc. The following video and guides provide tips.

   Make your Word documents accessible to people with disabilities

   Making Word Documents ADA Compliant Part 1 (Video)

   DHHS PDF Accessibility Reference

3. Create signature field(s) in Word. Users can also create form fields, drop-down lists, radio buttons, checkboxes and more. Do not use special characters in the signature or form field labels. Only use letters and numbers. Your PDF reader will convert these fields so that they are functional (see step #6 to learn how to create these fields in Word and convert them). Microsoft provides online instructions for creating form fields: Create a form in Word that users can complete or print

4. Convert the Word doc to PDF using the Save As function. Do not print to PDF.

5. Use your PDF reader to format the form and signature fields. If the same type of field, like a signature field, will be repeated for multiple recipients, be sure to label them differently (signature 1, signature 2, etc.). This will help later in the instructions. Adobe users can refer to these instructions for guidance: How to create PDF forms, distribute forms, and collect and manage forms data (adobe.com) If you are a Kofax Power PDF user, you will find that it has similar tools.

6. Check the tags in and the reading order. Note that these instructions apply to Adobe Acrobat users. Kofax will have a similar set of tools that can be used to complete this task. For assistance with this, you can contact the digital signature help desk at mdot-esign@michigan.gov

   Edit document structure with the Content and Tags panels (Acrobat Pro)
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7. Use your PDF readers accessibility checker to look for issues. You can then review each issue to fix it or to pass the issue.

8. Save the PDF.

9. Create New Transaction. Go to Settings and toggle on “Enable screen-reader accessibility”.

10. Add the accessible PDF document with signature field(s) and any form fields.

11. The Field Import screen will open. Click the Start Import button.

    Step 1: Add recipient(s). Click Next.
    Step 2: Link signature(s) to your recipient(s). Identify which signature field(s) in the PDF document are assigned to each recipient. For each recipient, click the Add Signature button. Choose the correct recipient for each of the signature fields in the document. Select the signature type. Click Next.
    Step 3: Link other field(s) in the document to the recipient(s). Click Add field to select the form field(s) in the PDF document, and the field type from the recipient profile (options: name, title, company, date) in the transaction. Also assign text fields and input fields (like radio buttons and check boxes) to the recipient. When all the fields are added, click next.
    Step 4: Review field associations. Click the Previous button if something needs to be fixed. Click the Done button if everything is correct.

12. Add more transaction details if necessary, such as signing order.

13. Click the Next button.

14. A warning label will appear telling you the document is read only, as it’s tagged for accessibility mode. Click the **x** in the label. You can preview the document to ensure all the signing fields are in the correct location, but it cannot be modified from this screen.

15. If the preview reveals a problem, go back to the step that caused the problem prior to sending. Click Send to Sign when ready.

Note*:* The sender will need to notify recipients using the transaction comments field, that if they need to fill in fields in addition to the signature, they must fill in those fields <u>prior</u> to signing the document, because once the document is signed, the other fields cannot be modified. Currently, the tool only treats the signature as a mandatory field when accessibility is enabled.

Recipient*:* If the signer wants the accessibility features to be activated for the accessible package, they can go to the More Actions drop-down in the top right corner of the portal