



1. The financial institution employee who will be responsible for processing the completed form will be the individual who will create the Web Form itself. This begins by using a form created in either Word or PDF file format. The Word/PDF form is then uploaded directly to the Adobe Sign portal and the Web Form creation process is initiated.
2. The employee defines the fields and information to be completed on the Web Form, along with tagging the signature field(s), initials and other relevant information required for the consumer to properly complete the form.

The signer authentication method is selected during the definition process. This will be utilized anytime the form is accessed and completed by the consumer.

**Best Practices for Web Forms Authentication:**

A. If the Web Form is to be published on the institution’s public web site, then an authentication method should be used for the form. Web Forms support the usage of KBA (knowledge-based authentication) or Government ID methods.

B. If the Web Form is to be published on the institution’s online banking system, then there is not necessarily a need to utilize an authentication method as the consumer’s identity has already been validated when they signed on and authenticated to your online banking site.

3. Once the Web Form is saved, an email with a URL and a Script is then sent to the employee who performed the Web Form setup. The URL or Script is then used by the institution to publish the form on either the Institution’s website or Online Banking site.
4. The Web Form is then published. In many cases, IMM Client institution’s create a “Forms Library” on their website to allow direct consumer access – or similarly methods to make forms available to the online banking consumer.

**Considerations for Publishing Forms:**

A. If the URL method is used, the consumer will see the Web Form located in an institution-branded page that is external to the institution’s web site.

B. If the Script method is used, the consumer will see the Web Form displayed in a frame within the institution’s web site.

5. The consumer will have access to the desired Web Form "on-demand" from either the Institutions website or the online banking system.
6. The consumer will then authenticate using the method selected by the financial institution. Refer to "Best Practices for Web Forms Authentication" above for more information.
7. The consumer will then consent (as in all eSign transactions) to perform the transaction electronically and using eSignatures. Once the consent is performed, the consumer will then be presented with the Web Form for completion and eSignature.
8. Once the consumer has completed the Web Form and completed the eSignature process, an email is submitted back to the employee who created/uploaded the Web Form notifying them of a completed form submission. The employee can then view or download the form in order to complete subsequent back office procedures.

The completed Web Forms can be downloaded each night and placed into a directory/folder on the institution's network for manual importing and indexing the web forms into the institution's imaging system (IMM eSign).

**Additional Note:**

IMM eSign plus can automatically index the web forms and archive them into the institution's imaging system without manual intervention.