Signature Verification Process

Signature verification is a process where candidates, treasurers and other committee officers review and digitally approve campaign disclosure statements.

There are four major steps to set up and use signature verification:

1. **Create a New NetFile User** - All document signers using Signature Verification must create a NetFile User account in order to log in to the NetFile system.

2. **Become a Document Signer** - All document signers must apply and submit a Signature Card to become a document signer and receive a Signer ID and PIN code.

3. **Add the Signer ID to the Local Campaign Filer Account** - The Signer ID must be added to the individual's Officer Information record in the Local Campaign Filer account.

   Note: For filers who use third-party software to generate CAL files and then upload the CAL files as e-filings using NetFile's CAL Upload application, the Signer ID is added directly to the CAL file. For further information about adding the Signer ID to the CAL file see the [CAL Upload Signature Verification](#) PDF file on the "docs" folder.

4. **Review Pending Filings** - Signers log in to the NetFile system to review and either accept or reject pending filings.

Create a New NetFile User

In order to log in to the new system, all signers must first create a NetFile User:

1. Go to the new log-in page - https://netfile.com/Filer.

2. Click the *New NetFile Users* link. The Create a New NetFile User page opens displaying the NetFile User Information form.

3. First Name - Enter your first name.

4. Last Name - Enter your last name.

5. E-Mail Address - Enter your e-mail address. You will use this e-mail address to log in to the NetFile system.

6. Confirm E-Mail Address - Enter your e-mail address again as confirmation.

7. Work Phone - Enter your work phone number.

8. Mobile Phone - Enter your mobile phone number.

9. Create NetFile User - Click the *Create NetFile User* button. The system sends an e-mail message to the e-mail address you entered in the NetFile User Information form.

   The e-mail message contains a link you click to receive a unique password. When you click the link, the NetFile User Confirmation page opens containing confirmation that the system has created your new user and lists your new user name (your e-mail address) and a unique password for the user. Save the password for your records. Click the *Go to the Log In page* link on the Confirmation page to open the log-in page.

Become a Document Signer

Submit an application to become a signer:

1. Log in to the NetFile system using your new NetFile User credentials. The NetFile User Home page opens.

2. Click the *Signature Verification* link. The Signature Verification page opens.

3. Click the Request Document Signer Status link. The Request Your Signer ID and PIN Code page opens containing the New Signer Information form.

4. Name as Signed - Enter your full name based on how you sign your name.

5. Your NetFile User E-Mail Address - Displays your NetFile User e-mail address.

6. Your NetFile User Contact Phone Number - Displays your NetFile User contact phone number.

7. Create New Signer - Click the *Create New Signer* button to submit your application for Signature Verification document signer status. The system displays your new Signer ID and PIN code.

   Save the Signer ID and PIN code. Your new Signer ID and PIN code are in a pending state until you print, sign and submit your Signature Card to NetFile.

8. Print the Signature Card - Click the *Print the Signature Card* link to download the Signature Card as a PDF file.

   a. Sign the Signature Card using **black ink**.

   b. Scan and e-mail the completed form to SignatureCards@netfile.com, or FAX the signed Signature Card to (415) 970-5015.

   c. Keep your signed copy of the Signature Card for your records.

      NetFile will send an e-mail to you with notification of receipt and acceptance of your Signature Card. NetFile will activate your Signer ID and PIN code after your Signature Card is received and approved.

      The Signer ID is unique to the signer and may be used in multiple Local Campaign Filer accounts. For example, an individual may be the treasurer for multiple committees. As a treasurer, the individual will act a a signer for all of the accounts and the Signer ID is valid for all accounts.

Add the Signer ID to the Local Campaign Filer Account

The Signer ID must be entered in the Officer Information record for the signer in the Local Campaign Filer account. All subsequent filings created in the account contain the Signer ID when the signer is selected during creation of the draft. The system places all documents e-filed out of the account that contain the user's Signer ID in a pending state awaiting the approval of the signer. To add a Signer ID:

1. Log in to the Local Campaign Filer account.

2. Select *Officer Information* from the Statements menu.

3. Add a new officer or edit an existing officer:

    a. If the signer does not exist as an officer in the account, Click the *Add a New Officer* heading to display the form to add a new officer.

    b. If the signer exists as an officer in the account, click the officer's *Edit* link to open the Edit Officer page.

4. Enter the Signer ID in the *Signatory Information* section of the add or edit form. Make sure to select the *Can Officer Sign Statements?* check box and enter the first and last name as signed.

5. Submit or Save Changes - Click the appropriate button on the add or edit form to submit the information.

Review Pending Filings

When a document containing one or more Signer IDs is e-filed, the system places the filing in a pending state and e-mails all individuals whose Signer IDs are contained in the filing. Signers then:

1. Log in to the NetFile System.

2. Click the *Signature Verification* link to open the Signature Verification page.

3. Click the *View Pending Filings* link to review the filing.

4. Approves or rejects the filing and enters their PIN number:

    a. When all signers whose Signer IDs are contained in the filing approve the filing, the filing is e-filed to the agency.

    b. If any signer rejects the filing, the filing is rejected and cannot be e-filed to the agency.

    c. If any signer does not approve or reject the filing within 30 days, the system automatically rejects the filing and it cannot be e-filed to the agency.