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Remote Signing Portal Saskatchewan User Guide

rev. July 14, 2020

Disclaimer

LDD is providing this portal as a free resource for a limited time to facilitate remote signing meetings with clients. It is your obligation to follow any and all requirements from your governing law society, land title/land registry regulations and/or mortgage lenders.

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Before you Begin

The steps outlined in this guide are meant to work in conjunction with the **Remote Signing Protocol** and other resources listed below. Refer to the following as you work through this guide. Click to download.

[Remote Signing Protocol](#)

[Video Conference Checklist](#)

[Remote Signing Memo to Client](#)

It's recommended to send this memo to the client a week prior to your signing meeting.



Optional Portal Passwords for Your Clients

1. When setting up a portal file, you can create a password for each of your clients.

Share this password with your client in a secure manner.

2. To login to the Remote Signing Portal, they can use this password.
3. For the client to login by answering the security questions, they will click on the blue text below the log in button.

The screenshot shows a client information box on the left and a login form on the right. The client information box is titled 'Client(s)' and lists: Name: Lio, David; Mobile: (blank); Email: david@ltd.ca; Portal Password: Dog2!; Code: (blank). A red box labeled '1 Optional Portal Password' points to the password field. The login form has fields for 'EMAIL ADDRESS' and 'PORTAL PASSWORD', a 'Log In' button, and a link 'Log in With Security Questions'. A red box labeled '2 Portal Password' points to the password field, and a red box labeled '3 Security Question Option' points to the security questions link.

Optional Access PIN or LDD Account login for Law Firm

4. To make it easier to login to the Remote Signing meeting for law firms, you can set a **6-Digit Access PIN** on your files. It is your choice whether you use the same PIN for each file.

Keep this PIN secure and do not communicate it to your clients.

The screenshot shows the 'Portal Information' settings page. It includes a 'Deactivate' button, 'Meeting Time' (12 PM), 'Meeting Date' (07/JUL/2020), 'Access PIN' (123456), and 'Video Conference Method' (LDD Meet). A red box labeled '4 Access PIN' points to the PIN field. Below the PIN field, text reads: 'Set an optional 6-Digit Access PIN as an alternative way to log in for any firm members on this file.' Below the video conference method, text reads: 'LDD Meet accommodates video conferencing up to 4 people. If more people are joining, schedule separate meetings.'

5. You can use the Access PIN to log into the portal, along with your email address. Alternately, you can use your **LDD Account** credentials. Switch between these options by clicking on the blue link below the Log In button

The screenshot shows two login forms side-by-side. The left form is for 'Access PIN' login, with fields for 'EMAIL ADDRESS' and 'ACCESS PIN', a 'Log In' button, and a link 'Log In With: LDD Account | Security Questions'. A red box labeled '5 Access PIN' points to the PIN field. The right form is for 'LDD Account' login, with fields for 'USERNAME' and 'PASSWORD', a 'Log In' button, and a link 'Log In With: Access PIN | Security Questions'. A red box labeled '6 LDD Account Option' points to the password field. Both forms include a note: 'LDD Meet™ Video Conference is supported in Chrome & Firefox on Windows, Mac & Android devices, and Safari on Mac & iOS devices.'

Logging into LDD for the first time

First time Setup for Each Workstation

In Internet Explorer 11, go to www.ldb.ca/support, scroll to **Online Utility**. Follow these 5 simple steps.

1. Ctrl-click on the **Adjust IE Settings** link, click on **Run** and follow on-screen instructions and accept everything.
2. Ctrl-click on **64-bit LDD Online Utility**, click on **Save. DO NOT RUN yet.**
3. Close all of your open IE Browser windows. This step is a must.
4. Find where you downloaded **LDDonlineUtility64.exe** and run it now. Follow all on-screen instructions. **If at any point it asks Modify or Repair – choose Repair.**
5. Re-open IE, go to www.ldb.ca/login

Requirements

Windows 7 or higher
Internet Explorer 11 (IE11)
Adobe Reader
High Speed (Broadband) Internet

Finding IE11 in Windows 10

1. Open the Start Menu
2. Scroll down to Windows Accessories
3. Open the folder
4. Launch Internet Explorer

Logging In

1. Enter the **Account, Username** and **Password** provided. Click on the **Login** button.
2. Select your province under the RealtiWeb heading. RealtiWeb will open in a new IE browser tab.

Creating your First Remote Signing File in RealtiWeb



RealtiWeb Main Screen Layout

1. **Main** screen link - use this at any time to get back to this screen.
2. **File List** - empty the first time you login. Any files you create will be listed here. The list can be filtered to help you find files faster.
3. Controls area - this is where you'll Create a New File. **Go ahead and click on Create a New File now.**

The RealtiWeb File Opening Screen

File Opening Screen

All the fields you need to create a remote signing file are available on this one screen. For a purchase or sale file, fill in the following:

1. **Responsible Lawyer**
Select from the list by clicking on ellipses [...] button
2. **File #**
3. **Deal Type**
4. **Firm Contact (optional)**
Select from list by clicking on ellipses [...] button
5. **Purchasers/Vendor**
Click on **edit** and follow instructions on next page
6. **Property Address**
If you don't have a civic address enter **None** in the Street Number field
7. **Parcel Type**
8. **Possession Date**
9. **Contract Price**
10. **Deposits**
If you don't have a deposit enter **\$0**
11. **After completing the required fields, click on Continue at the top of the screen.**

The screenshot shows the 'File Opening Screen' with the following fields and callouts:

- 1** Responsible Lawyer: Larry Smith
- 2** File #: 555abc
- 3** Deal Type: Purchase
- 4** Firm Contact: [empty]
- 5** Purchasers (as per APS) [edit button]
- 6** Property Address: SK
- 7** Parcel Type: [empty]
- 8** Possession Date: [empty]
- 9** Contract Price: \$ [empty]
- 10** Deposits: \$ [empty]
- 11** Continue button

Other visible fields include: Initials (LS), Required **, Do you intend to use TitlePLUS for this deal? (Yes/No), Is this Vacant Land? (No/Yes), Is this a new home purchased from a builder? (No/Yes), First Name, Middle Name, Purchaser(s) to reside at property on closing? (Yes/No), Purchaser(s) Mailing Address prior to closing, Other Side's Lawyer, Click for the Law Society of Saskatchewan - Lawyer Search, Street Number, Suffix, or RR# if applicable, Street Name, City/Town, Postal Code, Find, Reference Land Description, Offer Conditional? (No/Yes), Total \$0.00, Consideration \$0.00, Is GST Applicable.

Mortgage-Only (Refinance) Files

The mandatory fields in a mortgage file are:

- | | |
|----------------------------|---------------------|
| 1. Responsible Lawyer | 6. Property Address |
| 2. File # | 7. Parcel Type |
| 3. Deal Type | 8. Closing Date |
| 4. Firm Contact (optional) | 9. Mortgage Amount |
| 5. Mortgagors | |



Adding Purchasers, Vendors or Mortgagors to a File

Click on the **edit** button (see previous page).
Add contact information for your own client(s).

1. Complete the required fields
Purchaser Name
2. **Contact Method** (select from dropdown)
email and **phone number**.
3. To add another entity, select the red **Add New** link found on the left of the pop-up.

Follow the same steps for Vendors and Mortgagors if you're working on a Sale or Mortgage-only file.

Initiate the Remote Signing Portal

On the Basic Screen, click on **Initiate remote signing for this file**.

Saving your Files

RealtWeb automatically creates and saves your file when you click on the blue Continue arrow on the file opening screen.
When you're in a file, click on the **blue piggy bank** to save the file.

The Remote Signing Management Window in RealtiWeb

In this popup you'll find everything you need to setup your client portal for the remote signing session. We've included links to the Remote Signing Protocol, this User Guide and a fillable Video Conference Checklist to use before and during the Remote Meeting with your client.

LDD Remote Signing Portal Setup Remote Signing Protocol View User Guide Close

Clients: David Lio | **Property:** 2112 Penny Lane, Huron, Ontario L3T 1J4

Portal Information

Portal is Active Deactivate

Meeting Time: 12 PM

Meeting Date: 07/JUL/2020

Access PIN: 123456

Video Conference Method: LDD Meet

Security Information

Closing Date	Contract Price	Street #	Deposit Total
13/JAN/2011	500,000.00	2	5,000.00

RealtiWeb Documents

	DATE UPLOADED	DATE READ
Retainer Terms remove	06/JUL/2020 - 12:05:25	-

Upload Documents

	DATE UPLOADED	DATE READ
SolPS07 remove	17/JUN/2020 - 15:15:16	-

Browse... UPLOAD

Client(s)

Name: Lio, David

Mobile:

Email: david@ldd.ca

Portal Password: Dog2!

Code:

Email Invitation

Irene Ward will be cc'ed on the email. If using LDD Meet, please open the link in the email (using Firefox, Chrome or Safari) to login and start the video conference.

Video Checklist

Use our checklist to make sure you don't miss an important step during your video conference.

LDD is providing this portal as a free resource for a limited time to facilitate remote signing meetings with clients. It is your obligation to follow any and all requirements from your governing law society, land title/land registry regulations and/or mortgage lenders.

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The **Meeting Date**, **Meeting Time** and **Video Conference Method** are fields based on independent conversations with your client. They are included here for your reference and will be displayed on the client's signing portal. The optional **Access PIN** is used for your easy log into the portal.

The optional **Portal Password** field is used to create a password for your clients to log into the portal. The optional **Code** field is for recording the code you verbally give to your clients during the remote signing meeting. See the Remote Signing Protocol document for more details.

You can use **LDD Meet™**, our own videoconferencing capability, to conduct the remote signing meeting, or you can use another application (Facebook Messenger, Skype, etc.) at your own discretion. The advantage of LDD Meet, is that it works directly in the browser without the need for you or your client to download a separate application.

Security Information is displayed from data you entered on this file. This data will be used to automatically create security questions on the portal.

To **Upload Documents** for the client, **convert them to PDF** in your own conveyancing application. Then click on the **Browse** button to find them on your computer. Upload the PDF files one at a time.

Note: It's recommended to send the **Remote Signing Memo to Client** prior to sending the email invitation to the client.



Inviting your Client to the Remote Signing Portal

Once you have uploaded the necessary documents, you can send out the email invitation to your client. The Lawyer and Support Staff listed on the file will automatically be CC'd on this email.

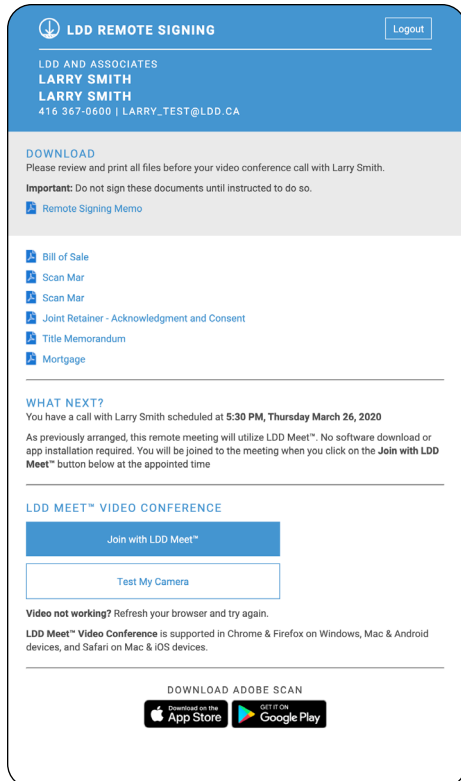
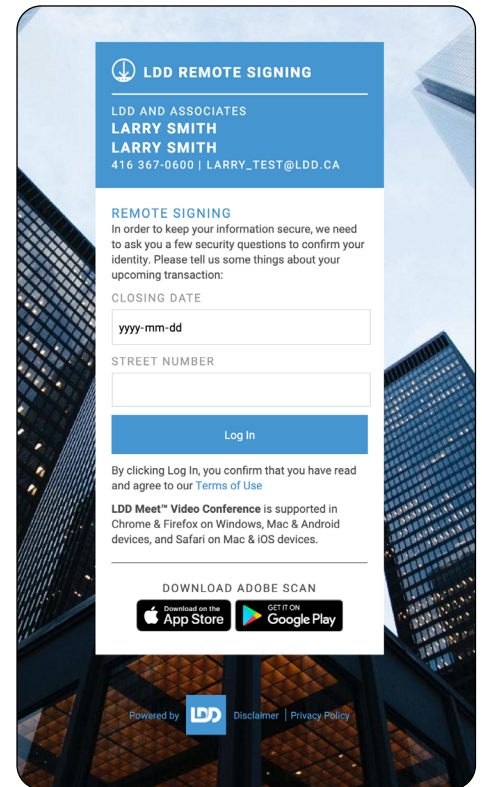
The email includes a unique, secure link that both you and your client will use to access the portal.

The portal has been optimized for modern browsers and works on desktops, laptops, android phones and iOS (Apple) phones & tablets in the following browsers:

Chrome & Firefox on Windows, Mac & Android
Safari on Mac & iOS (Apple).

Either the Portal Password or Security questions will have to be answered correctly to access the portal. Too many wrong answers will lock the portal. If that occurs, open the Remote Signing window in RealtiWeb and click on the blue UNLOCK button. Then Save your RealtiWeb file.

It is assumed you will email the portal invitation to your client in advance of your meeting, giving them time to download and print the closing documents.



Downloading Documents from the Remote Signing Portal

After successful login, the client can now access the documents for downloading and printing

You can continue to post documents (if necessary). The portal remains active until you deactivate it within RealtiWeb.

The previously agreed to meeting date, meeting time and video conferencing method are listed. If you are using a third-party app for video, you will launch that and call your client at the appointed time.



Using the LDD Meet™ Video Conference Application

LDD MEET™ VIDEO CONFERENCE

Leave LDD Meet™



Video not working? Refresh your browser and try again.

LDD Meet™ Video Conference is supported in Chrome & Firefox on Windows, Mac & Android devices, and Safari on Mac & iOS devices.

DOWNLOAD ADOBE SCAN



LDD Meet runs directly within the supported browsers mentioned previously.

To start the meeting, all parties will click on the **Join with LDD Meet™** button.

Follow the steps outlined in the Remote Signing Protocol and Video Conference Checklist during the meeting.



To take a picture of your client holding their ID, you can click on the blue camera icon at any time. This will take a picture and save it to your browser's default downloads folder. The filename will begin with your RealtiWeb file number.

You can also record your session using the instructions on the next page.

After the documents have been signed to your satisfaction, you can direct your client to scan and return them to you in the method of your choosing.

We have included links to the Adobe Scan application on the portal as it produces PDF files from a mobile phone's camera for your client's convenience. This app is free to download for Android and Apple devices. Please review this app to ascertain its suitability for you and your clients.

Once your meeting is finished all parties can click on the **Leave LDD Meet™** button.

Additional Signing Meetings for this Transaction


This portal will remain active until you **Lock** it in RealtiWeb, or delete the RealtiWeb file. If you need to use it to sign additional documents simply inform your clients to reload the portal.

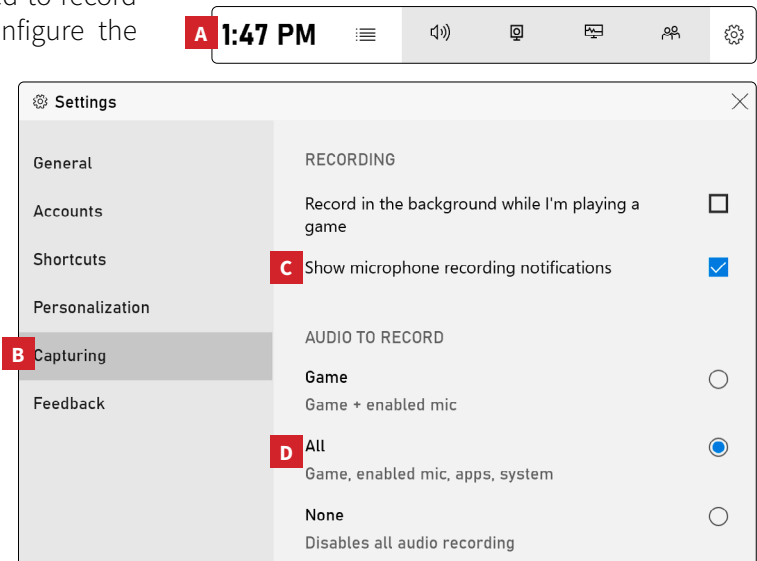
Recording the Video Conference

NOTE: It's recommended that you follow the most up-to-date guidance of your provincial regulatory bodies regarding the need to record, and the need to obtain written consent to record, the video conference.




First Time Setup on a Windows 10 Computer

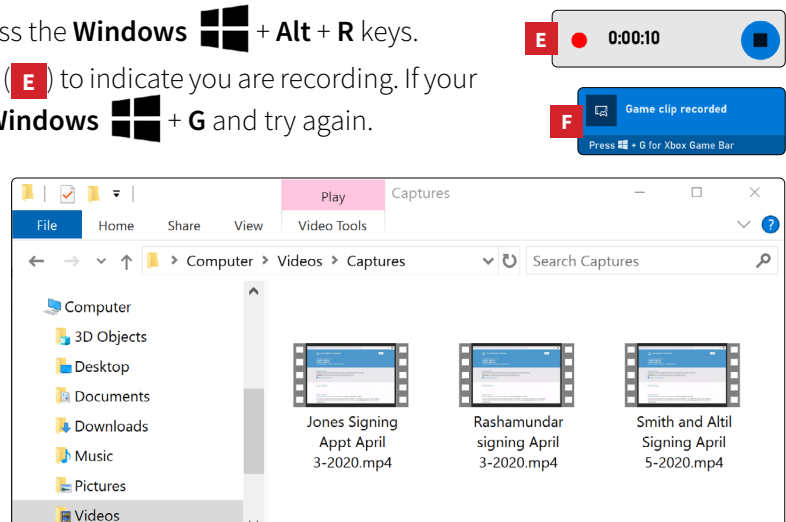
Windows has a built in recording feature that can be used to record your video conferences. Follow the steps below to configure the application.

1. On your keyboard, press the **Windows**  + **G** keys simultaneously.
2. Click on the **Gear** icon on the pop-up window (A).
3. In the **Settings** window, select **Capturing** (B) then check **Show microphone recording notifications** (C) and click on the round radio button beside **All** in the **Audio to Record** section (D).
4. Click on the **X** to close the settings window.



Recording during the video conference in Windows

1. When you are ready to start recording, press the **Windows**  + **Alt** + **R** keys.
2. The notification bar is displayed on your screen only (E) to indicate you are recording. If your recording doesn't begin after a few seconds, press **Windows**  + **G** and try again.
3. Press **Windows**  + **Alt** + **R** again to stop the recording. A confirmation message (F) displays for a few seconds. Clicking on this message takes you to the folder with the video. By default, Windows places the videos in **C:\Users\YourName\Videos\Captures**.
4. You can now rename the video to reflect your conveyancing file number and move it to the appropriate folder on your computer.



Using a Mac computer for the video conference?

You can record the session using Quicktime. [Follow these simple setup instructions from Apple.](#)

Adding Support Staff to your Account

You can add more support staff to your account any time you are in a RealtiWeb file.

1. Open any file and scroll down to the **Firm Contact** area of the RealtiWeb **Basic Information** tab.
2. Click on the ellipsis button [...] beside the field then click on the blue **Add** link at the top of the screen.
3. Fill in **Staff Member Name**, **Phone No.**, and **Contact Method** with the staff person's email address.
4. You can ignore the rest of the fields.
5. Click on **Update List**. To add another, click on **Select Another**. Otherwise, close the pop-up.

The new staff member is now saved in your account and is available in all your files.

Staff Information	
Staff Member Name	Test User
Initials	
UserID	TU
Position/Job Title	Tester
Phone No.	
Fax No.	
Miscellaneous Contact Information	
Contact Method	Email support@ldd.ca
Contact Method	

Adding Lawyers to your Account

You need administrative rights to add Lawyers. After you login to LDD from www.ldb.ca/login, you will see the **Firm Account Admin** option near the bottom of the product selection screen.

1. Click on **Firm Lawyer/Notary Designation** on the Account Administration screen.
2. Click on **Add Lawyer/Notary** at the top of the lawyer table.
3. Expand the chevron beside **Add a Lawyer without a LAWPRO Password** by clicking on the + symbol.
4. Fill in **First Name**, **Last Name** and **Email**.
5. Make sure the communication preference dropdown towards the bottom of the screen is set to **Email**.
6. **Click on the blue piggy bank to save this Lawyer.**

Adding Users with their own Login Credentials

You need administrative rights to add users. After you login to LDD from www.ldb.ca/login, you will see the **Firm Account Admin** option near the bottom of the product selection screen.

Administrative:

- ▶ [Firm Account Admin](#)
- ▶ [Update Payment Information](#)

1. Click on **System User Management** on the Account Administration screen.
2. Click on **Create New User** at the top of the user table.
3. Fill in **User**, **Password** fields, **First Name** and **Last Name**.
4. **Click on the blue piggy bank to save this user.**

RealtiWeb offers other optional settings if you choose to further refine user access.

Administrator checkbox gives this user administrative rights.

Expiry Date sets an expiry date for this user's password. This is good for granting access to temporary workers.

Force Password Change checkbox makes the user change their password the next time they log in.

Lock User checkbox locks the user's account without deleting it. Good for temporary suspension of a user.

User Rights provides options that further restrict user access within RealitiWeb.



Frequently Asked Questions

How do we get started?

Follow the steps in this guide to set up a dummy file to test out the opening process, document uploading, client invitation and video conferencing features. Invite co-workers to the remote signing portal so they can experience it as your clients would.

Why is LDD offering this application for free? How long will it be free?

We feel that it is vital to support real estate solicitors at this time by offering this tool to legal professionals who feel they could benefit from it. We will continue to offer it for free as circumstances dictate. If anything changes, we'll let you know.

Is this the final product?

Far from it! We were in the middle of launching our next generation of RealtiWeb with many more advanced time-saving features, but we rushed to release this (very) early version of the Remote Signing Portal to meet an immediate need. Stay tuned for more information.

Help! I missed some required fields during File Opening!

Don't worry. RealtiWeb will let you know what you've missed. All the required fields can be found on the **Basic Information**, **Property and Legal Description** and **Contract Details** tabs.

My client says the portal has been locked. What do I do?

Go to the related file in RealtiWeb, open the Remote Signing window and click on the blue **Unlock** button. Then save your RealtiWeb file. Ask your client to refresh the web page and try again.

I made changes in RealtiWeb but they're not being reflected on the signing portal?

Certain changes are only updated on the portal when you Save the RealtiWeb file. If your client is on the portal while you make a change, they will need to refresh their browser.

What is the Code field for on the Remote Signing Management window?

For added security, you may choose to direct your client to write a special code on the documents they are signing. This optional field is here to help you keep track of this code for your own records.

How do I get more help?

If the answer can't be found in this guide, go to the Help menu at the top of the screen. Click on User Guides and try there. If you're still stuck, send us an email at support@ldd.ca.



Additional Features for Existing RealtiWeb Users

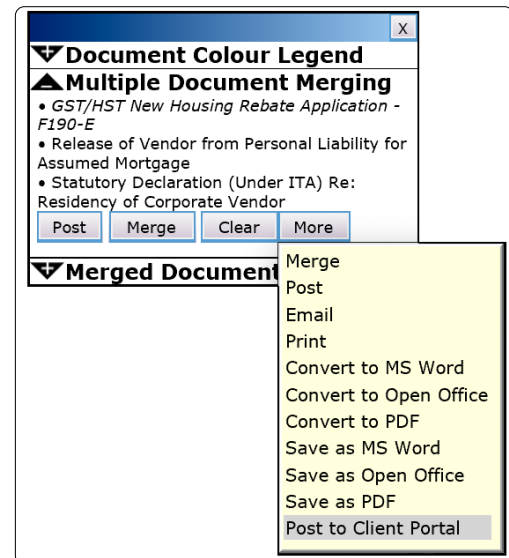
Much of this guide has been written for users who do not currently use RealtiWeb as a conveyancing application in their practice. If you are using RealtiWeb, much of the information prior to the **Initiate the Remote Signing Portal** step includes things you already do in your daily use of the system. You may want to review the mandatory fields required for the portal to save yourself frustration.

Uploading RealtiWeb Documents to the Portal

You can upload RealtiWeb documents directly from the Docs screen. Right click on a document, (or package of documents) and select **Post to Client Portal** from the dropdown menu. This will merge the document, convert it to a PDF and upload it to the portal.

To upload multiple documents at once, hold down the **Ctrl** key and **left-click** (with your mouse or trackpad) on the documents to merge. Each document you click on will be added to the **Multiple Document Merging** area of the Docs screen. When you are ready to post all these documents, right-click on the list and select **Post to Client Portal**

You can also upload PDFs from your computer by using the methods outlined earlier in this guide.



Changing Your Location on Documents for Signing

If your location is different than your office location, you may need to change the city name. You can do this easily by expanding **Document Control Items** by clicking on the **+** symbol. Change any relevant information then merge your documents.

Document Control Items:

Label/Envelope/Fax

Open Save Folder

Document Date: 05/APR/2020

Dated at: City of El Dorado in the Province of Narnia

Signature Date: this day of April, 2020

Delivery Notation:

Use Electronic Signature? ☐ LDD E-Sign™

Remote Signing? ☒

New Remote Signing Documents in RealtiWeb

In accordance with the Registrar of Titles Directive of March 18th and the Law Society of SK Practice Directive issued March 25, we've added the following documents to RealtiWeb.

Form PD1 - Declaration of Lawyer located in Closing Docs and Letters

This form is to meet the Law Society's directive:

"prepare a written record, in Form PD1 prescribed by the Law Society of Saskatchewan for placement on the client file, detailing how the above noted risks associated with the execution of documents by electronic means were addressed. "

Certificate of Lawyer - Remote Witnessing located in Land Registration Documents

This certificate to be executed by the lawyer for each client who signs a Land Title Authorization document, in accordance with Clause 27.4 of The Land Titles Regulations, 2001, Documents Witnessed by a Lawyer during a Public Emergency Period.

Video Conference Checklist located in Closing Docs and Letters

Merge this checklist from RealtiWeb prior to your Remote Signing Meeting to include file information and the list of documents you've uploaded to the portal.

Video Conference Consent located in Closing Docs and Letters

Merge this document and have it signed by each client to obtain the client's written consent to proceed with the transaction by video conference and to have the meeting recorded.

In addition, we have amended all jurats in LDD standard docs to indicate that lawyer witnessed via electronic means where the checkbox in Document Control Items, Remote Signing, is checked.

