

PeopleWerksHR – Electronic Signatures

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Overview

Expanding on the feature of sending documents via email to employees, PeopleWerksHR can now send documents for electronic signatures, using Signable. Documents can be routed to just the employee for signature or routed for multiple signatures based on your workflow requirements. Signed documents are automatically returned and saved in PeopleWerksHR. No longer does the employee have to print out a copy of their document, sign it, and return to the HR office for filing.

Using the same Letters section of PeopleWerksHR and making minor adjustments to existing templates, the distribution list is used to send documents out for employee signatures. The user/sender will receive an email that the batch of documents are being processed and if there are any errors with the email addresses.

Your employees will receive an email with the document attached for their signature. They will click on a web link to see their document and enter the required information. Once they sign and submit the document, they will get an email back with the signed document for their records. At the same time, the system will send the sender an email with the signed document attached and will save it in PeopleWerksHR.

During the process, PeopleWerksHR keeps track of the status of documents sent for signing so you can check the status at any time to know if a document has been viewed or signed.

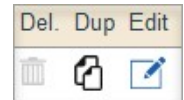
Initial Configuration

There are a few steps required before being able to use the electronic signature feature that PeopleWerksHR Support will do for you once you have identified the authorized users/senders.

- Set up your account in Signable.
- Set system permissions in PeopleWerksHR User Management for authorized users who will be running the process of sending documents out for signature. Without this permission, the option to Send for Signatures will not be shown in the Letters section.
- Set up the authorized Sender names in the User Signature System section.
- Working with the District, customize the email formats for the initial notification, the reminder notifications, and the confirmation notifications that go to the employee.
- Working with the District, customize the logo and web landing pages.

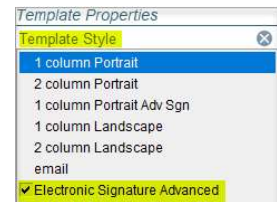
Letter Template Setup

If you have an existing template that you want to use to send for electronic signature, you may want to duplicate the template first and make the changes there so that you still have the original template available to use should you choose to send it in the original way. To duplicate a template, click on the Duplicate icon. Then click on the Edit icon to revise the template name and description as needed.



Template Style Selection

If your template uses a signature block (which is a graphic element that contains other signatures such as the Board President and Treasurer), and you want the employee signature to be in line with the signature block, select the new Template Style of **Electronic Signature Advanced**.



Under the Header section, click on the checkbox to see the signature block and text section. If your signature block is formatted as left justified, then enter the employee signature-related fields in the block on the right. If your signature block is formatted as right justified, then enter the employee signature-related fields in the block on the left.



If you are using a signature block but it does not have a place designed for the employee signature, you can either insert the signature-related merge fields before the end of the template or you can use the **1 column Portrait Adv Sign** Template Style to insert the signature-related fields after the signature block.

PeopleWerksHR Support will revise your existing signature blocks so that they can be used for this application. They will be resized and formatted based on your needs.

If you are not using a signature block, then you can use the standard **1 column Portrait** Template Style and insert the signature-related merge fields wherever needed.

If you want to use the template for routing to more than one signer, then you must use the new Template Style of **Electronic Signature Advanced**.

You cannot use the Email Template Style for electronic signature documents.

Template Merge Fields

There are new merge fields for use in electronic signatures. They are found in the Field Type list of Letters-Signatures. You will see that in addition to fields for signature, there are also fields for dates, text and special check boxes.

With your cursor in the desired location in your template, select the merge field to insert.

When inserting the signature field, you may want to format it to be larger than your standard text – perhaps 24 pt font size. This creates a block in the document for signing so the larger size will create a larger block.

The only exception to this is if you insert the signature field in one of the two smaller text boxes like what is shown here:

Merge Field Selector (14)	
Field Type Letters - Signature	
Field Name	
1	Signer 1 - Multi Check Box Option 1
2	Signer 1 - Multi Check Box Option 2
3	Signer 1 - Multi Check Box Option 3
4	Signer 1 - Multi Check Box Option 4
5	Signer 1 - Signature
6	Signer 1 - Signature Date
7	Signer 1 - Single Check Box
8	Signer 1 - Text Name
9	Signer 2 - Signature
10	Signer 2 - Signature Date
11	Signer 2 - Text Name
12	Signer 3 - Signature
13	Signer 3 - Signature Date
14	Signer 3 - Text Name

Text above signature [x] Signature Blocks & Text below signature

Enter Details for a Signature on the Left Side

Enter Details for a Signature on the Right Side

Enter the text that will appear BELOW the signature block

In this case, the signature field needs to be 18 pt font size and the merge field cannot wrap to a second line. For example, if you show text “Employee Signature” and then insert the merge field after that, it will not fit on the same line, so you must have the merge field below the text.

You will want to preview the document to make sure everything is aligned the way you want.

Signature Routing





As part of setting up the template, you will need to consider the signature routing requirements. There is nothing needed to set up if the template is used for only one signer because the system defaults to the employee as the one signer.

If, however, you want to set up a workflow for acquiring signatures, then you must use the **1 column Portrait Adv Sign** Template Style where you will see the routing feature. You will select the signers in the order of your workflow.

Signature Routing			
Signer 1	Employee		
Signer 2	Other	Name	Email Address
Signer 3	Select		

Distribution List Creation

Once the template is ready, then create your distribution list as normal. Pay particular attention to the color of the envelope icon. If it is red, it means there is no email for the person. In that case, you will want to edit the employee record by clicking on their name and entering their work email address. If it is blue, you can hover over it with your mouse to see the email address that will be used. If it needs to be changed from a work address to a personal email address or vice versa, click on the envelope and make the change.

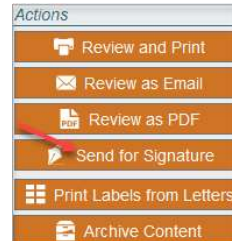
Distribution List - by Personnel (2)				
Person	Position	Home Building	Status	Remove
Anderson, Wayne	Assistant Treasurer	Admin	Active-	 
Bassett III, Ivan	Transportation Supervisor	Admin	Active	 

Send for Signature Process

When the template and distribution list is set, then simply click on the Send for Signature option.

You will be required to enter the common e-mail that all the people on your distribution list will get along with their document for signature.

There will be a message that the documents have been sent. The system will automatically save the documents in the archive.



Error Checking

The system will catch issues that will prevent the employee from receiving their document to sign. Three issues that may occur are:

- Network communication issue
- Missing email address
- Invalid email addresses that get bounced back

In all cases, the sender will be notified.

Employee Signing Process

The employee will receive an email that there is a document for signing. It will include a link that will take the employee to the web page with the document for signing. If they do not click on the link, they will receive additional reminders that a document is waiting their signature.

Once they sign the document and enter any other required data fields, they will Submit the document. They will receive a confirmation message that the signed document has been submitted.

They will also receive an email with the signed document attached for their records.

Email Notices for Sender

After the batch of documents are sent for signature, the following email notifications are generated to the sender throughout the signing process.

- Sent for Signature Summary Report from PeopleWerksHR - indicates how many documents are processing and if there are any errors due to missing emails.
- Email Failure from Signable – indicates there was a bounce backs from the email provider. A link is available in the email that allows for a bounced back email address to be corrected. This does not correct it in PeopleWerks so you will need to enter it back in PeopleWerks so that there is not a problem in the future. This notification will be generated for each email bounced back.
- Document Signed email from Signable – indicates an employee has signed the document and the signed document is attached for printing or filing purposes if needed.
- Nightly Status Report – provides the status for all sent documents that have not been signed yet. If a document was signed that day, it will be on the report that night but will drop off the report the following night.

Document Signing Progress Monitoring

Using the Sent Notifications report in the Reports or the Letters sections, you can see the status of documents that you have sent for signature. You can also see this status in the Employee Correspondence History section. This status is updated on a nightly basis. The statuses are as follows:

- Document Sent – This status is set every time the document is sent to the recipient which includes not only the first time the document is sent but also when the daily reminder is sent when the recipient has not signed yet.
- Failed – The party email is missing
- Failed – Email Bounce Back
- Opened Email
- Document Viewed
- Document Signed

Cancelling Documents Sent for Signing

There are several reasons why you might want to cancel or delete documents that you have sent for signing.

- Sent incorrect document - wrong template or a template with a formatting error.
- Sent to a wrong person.
- Sent a document that was in error but signed by recipient.

You can cancel a sent document that has not been signed yet or delete a document that has been signed. The process for doing either of these can be done in one of three places:

- Sent Correspondences section in the Letters menu
- Correspondence Archive section in the Reporting menu
- Correspondence History section in the Employee record

Documents not Signed

To cancel a document that has not been signed yet, click on the “Cancel Signature Request” icon shown here.

Sent Method	Sent Status	Delete	View
Sent for Signature via Signable	Document Sent		 

There are two steps:

1. You can have the system notify the recipient with an email that the document has been canceled, or you can have the system cancel the document without the recipient being notified.
2. You can have the system delete the document from the Correspondence History or not.

Cancel Signature Correspondence?



You are requesting to cancel this signature correspondence. This will only cancel the signature process but retain the record in the employee's historical correspondence list. Do you wish to cancel without notifying the person (Silent); have the system notify the recipient the document has been cancelled (With Email); or do nothing at this time (No Action)?

Signature Document Canceled

Your request to cancel the attached document was completed. Do you want to remove this record from the correspondence archive at this time?

Documents Signed

To cancel a document that has been signed, click on the Delete icon shown here:

Sent Method	Sent Status	Delete	View
Sent for Signature via Signable	Document Signed		

The document will be deleted from the Sent Correspondences and from the E-Cabinet.

Tips

The following are tips for users of the Electronic Signatures feature:

- Senders should make sure the communications from “Signable” are not going into their SPAM folder.
- Senders may want to set up a “rule” in their email system so that the documents from “Signable” go to a separate folder. Since the senders will receive the signed document from “Signable”, the special folder will facilitate easier viewing and management of these.
- Attachments to the emails must be pdfs and not other types of documents.