



Perform the following steps to E-Sign a document as part of the Onboarding process:

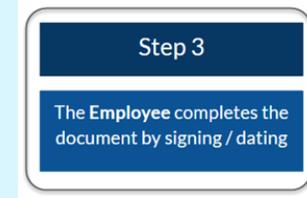
1. The employee end user receives an email onboarding invitation.
2. The user clicks on the link in the onboarding invitation. The system displays the **Onboarding wizard** screen.
3. The user clicks the **Save and Continue** button.
4. The user scrolls down to the **Company Documents** section of the **Onboarding** screen.
5. The **Review and e-sign documents** section of the screen shows all the documents associated with this onboarding Task List that the employee will need to E-Sign.

The **Review and e-sign documents** section lists any onboarding documents that are to be signed using the E-Signature integration with HelloSign. The **Review and download documents** section below lists any documents that the Admin may still have set up from the prior onboarding process (Pre-HelloSign). This section may have been removed by the administrator.

6. To E-Sign a document, the user clicks on the Pencil icon to the left of the document name on the list that they want to review and sign.
7. The embedded **E-Sign** screen (which is actually the HelloSign© application) opens in the drawer which appears from the right side of the screen.
8. The user clicks the **Get Started** button at the top of the screen.
9. The user clicks the **Click to Sign** button. Note that the system indicates the number of required (**REQ***) fields the document contains.
10. If the required field is a Signature field, for example, the **Create Signature** popup then displays.
11. Users can draw or type their signature in the **Create Signature** box by clicking the **Draw it in** or the **Type it** in buttons on the left side of the popup.
12. After entering or drawing the signature, the user clicks the **Insert** button to insert their signature into the document. If there is a signing date field on the form, the system will complete this, the user does not have to enter the date.
13. If this is the final required field on the document, a message appears at the top of the screen stating “You have completed all required fields, Please click the Continue button”. The user clicks the **Continue** button at the upper right.
14. The system displays the **Almost Done** screen where the user agrees to be legally bound by the document they have signed.
15. The user clicks the **I Agree** button at the upper right.
16. The system returns to their **Documents** screen and a green checkmark appears to the left of the document the user just E-Signed.

Once complete, all documents have been signed as indicated by the green checkmark(s) to the left of each required document on the list.

17. The user will then E-Sign for the complete Onboarding process in the **E-Signature** section at the bottom on the screen. The user returns back to the final steps of the existing onboarding process.
18. Once complete, in the **Review – Final Step** section of the screen, the user clicks the green **Submit my Onboarding** button.
19. The system displays an “Onboarding step saved successfully” message to the right and then a “Success” message displays on the screen.



Advanced HR 2.0 has an industry standard E-Signature Verification integration with the HelloSign© application.

With the embedded E-Signature Verification feature, employee users can simply sign on to Advanced HR to easily E-Sign documents. Signing on to the HelloSign.com application login is not required; this is a seamless integration within Advanced HR and users are not required to have a HelloSign account.

The user, as part of the existing onboarding process, is asked to review and sign documents. This now includes the ability to E-Sign each document with the HelloSign signature verification application.

To E-Sign the document, users follow the steps listed at the left. Note that screenshots are not included here for brevity; refer to the *E-Signature Guide for End Users* for complete information.

