SmartSign

Video: SmartSign: Intro, Onboard Portal, and Automated Tasks

SmartSign is SmartSearch's own digital signature tool and allows users to distribute signatures and more to candidates and contacts. Not only can users gather signatures, but they can capture important information such as tax filings, EEO status, direct deposit, emergency contacts, and more. Users can upload directly into SmartSearch. Once uploaded, users can route those documents for signature.

In addition to SmartSign, SmartSearch also offers the onboarding portal which allows candidates to accept or decline offers, verify information, and sign documents.

Note: Signing documents has never been easier. Candidates or contacts can sign documents directly from their computer or phone.

SmartSign with the Onboard Portal and Using Automated Templates

The easiest way to get the newest onboarders to the onboarding portal is by using an automated template.

Note: Your system will likely not work the same way as shown in the video. Since SmartSearch is customizable and all businesses are not alike, templates, documents, processes, and traks may be different.

After making an offer to the candidate and filling in the rate schedule, users can see the system configured automated email template with a link to the onboarding portal with documents attached.

Note: System administrators can set up automated tasks with templates to any track. They can choose what the body message says, who to send to, what documents to attach, and more.

Tip: Users can choose to send additional documents or deselect documents to not be sent out. There's an option to send additional attachments too, such as documents directly from your desktop that may need signatures. For example, contracts or offer letters on your desktop can be sent out to candidates for signature.

Logging in as the Candidate

Once the candidate receives the email with the onboarding link, they are able to accept or decline their offer. The benefit of the onboarding link is that it takes the candidate through steps to review the offer, verify information, and send documents.

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The candidate has two initial options:

- Decline Offer: If the candidate declines the offer, they will be able to choose a reason for declining. Then, the system will automatically reject the candidate from the job. The candidate will no longer be processed through the additional steps.
  - Note: System Administrators can choose decline reasons. Navigate to Admin>Lists>Lists> Candidate-Reason Offer Decline.
- Accept Offer: Accepting the offer leads the candidate to verify personal information and answer additional questions. Any information the candidate updates will also update their documents that are pending signature and their candidate profile in SmartSearch.
  - Note: SmartSearch can work with System Administrators to design the onboard portal with information, questions, and required fields just as their company would like.

From the User's POV after the Candidate Signs their documents

- If the candidate declines: The HireTrak will disposition the candidate to *decline offer*.
- If the candidate accepts: The HireTrak will progress the candidate to *accept offer* and start the candidate on the OnboardTrak.

Video: SmartSign without the Onboard Portal

SmartSign can be used without the Onboard portal enable. The biggest difference is the candidate experience. Instead of the candidate proceeding through steps to sign documents (accept, verify information, and sign), the candidate will simply sign documents.

Tip: Documents can be initiated from any step in the HireTrak or OnboardTrak. Any step have have automated tasks with documents attached to emails.

Note: The training system in the video has the accounting gateway enabled. If your database does not have the accounting gateway enabled, the *Submit to Accounting* button will say *Hire* instead.

If there is an automated email with documents attached, users can deselect documents or select additional documents to send. If System Administrators do not want users to change the email or documents being sent out, use the auto-send option instead when setting up automated tasks.

Using the Work In Progress

With SmartSign enabled, users get additional lists on their work in progress to see the details of documents.

Note: If you do not see SmartSign on your work in progress, use the green configure icon to make sure that any SmartSign list that you want to use is enable.

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Users can see from the work in progress the entire document management system such as:

- Pending Signatures,
- Recent Signatures,
- Counter(sign) Needed,
- and Expired Sign

Tip: To resend expired signatures, simply click on the *Expired Sign* list in the work in progress. Scroll until you see *Send Reminder*. Click the link to resend the documents to the candidate.

Singing Documents as a Candidate

Once the signer receives the email with the sign document link, they will be navigated to a document sign page. If it is their first time signing documents, they will create a pin.

Tip: If a candidate needs a new pin, you can resend them from your work in progress list!

After creating a pin, signers can see all of the documents that are awaiting their signature. When the signer chooses a document to sign for the first time, they will be required to make their signature. Once created, the system will remember their signature. Then, they will agree to use the electronic signature.

If the document does not require a countersign, the signer can download and see the filled out document right away.

From the User's POV after the Candidate Signs their documents

In the signer's SmartSearch profile, under the *See Docs* tab, users can find the signed copy. If the document has merged fields, it will also update the signer's profile.

Document Preparation

System administrators can choose how to set the documents.

- Require signers to fill in all information themselves
- Pre-merge information from their SmartSearch profile
- Choose field helpers for better signer experience such as:
  - Social security number (xxx-xx-xxxx)
  - Date of birth (Signer must be 16 years or older)
  - Date
  - Short date (mm/yyyy)
  - Numeric
  - Text only
  - Email or
  - Federal exemptions
- The ability for the signer to upload images
- Countersign capabilities
  - Note: Countersigning is a permission that can be granted by a system administrator by navigating to Admin>Users.

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Video: Prepping Documents

Prepping documents for SmartSign is easy. Users can prep Word or PDF documents and flag them as needing a signature. Prepare the document outside of SmartSearch and then load it when it's all ready. Once uploaded, users can use the field helpers in the document section to help the signer experience.

Preparing a PDF
Outside of SmartSearch, use a program that allows PDF edits.

Note: If you need help preparing a PDF, just reach out to the SmartSearch Client Success Team!

First, users will want to identify the form fields. Drag and drop a textbox where you would like the merged information. The text fields should correspond with the SmartSearch merge codes that are used in templates. Just use the code without the "--" before and after the code.

SmartSearch merge codes can be found anywhere there is an email template.
Using predefined merge codes has two benefits:

1. When you create the document, the system will populate as many fields as possible with values in the database. This includes demographic information, salary information, job titles, start dates, hiring manager names, and many more.
2. Once the signer has completed the form, the values they entered will be loaded back into the database.

Tip: Make each field name unique. Don't use the same field name more than once in a document. Doing so prevents the document from properly being updated when a signer completes the form, and it confuses the tab order on the page. If you have multiple fields with the same name, add a numeric value after the name to make it unique. For example, “fname” is a standard merge field for the signer's first name, but you may need this field to show up multiple times in the same document. To do this, name the first field “fname”, the second “fname2”, then “fname3”, and so-on.

The SmartSearch mail-merging feature, which loads the signer's demographic and hire information into documents prior to signing, is already configured to look for “fname2”, “fname3”, “lname4”, “homephone2”, “homephone3”, etc.

Note: Field names should not contain spaces. Including a space may cause the field to be ignored when merging the data back into the PDF.

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Other PDF Tips:

- Check boxes are fine to use in a PDF, but don't use them if you want the signer to be able to select only one of the check boxes. In that case, use radio buttons instead, group them together in the same group, and name each one numerically, starting with 0.
  - Example If a user want to ask ethnicity -Group them into the ethnicity group, and name each item ethnicity0, ethnicity1, enthnicity2, ethnicity3 etc. it is VERY important to name this this for mapping purposes. We need to know the first item in the list of options ends with 0, the second ends with 1 etc. This is how the system knows which one to "check" when we merge their answers with the document at signing time.
- SmartSign will honor many of the rules set up in the PDF.
  - For example, if a field is read-only, it will be read-only when signing as well. Making it required in the PDF will result in it being required when signing as well.
- References- SmartSearch has special naming conventions for documents that desire to collect employment references, personal references or education references. When used, the system will import their answers into the appropriate area, allowing you to search on education and employment history, as well as for use when exporting to third-party background check companies.
  - The system can accept up to 20 references per document.
    - The naming is very important, and must number each group.
    - For example if you have three company reference fields with name and phone number you would name then
      - Reference_company_name_1,reference_company_phone_1
      - Reference_company_name_2,reference_company_phone_2
      - Reference_company_name_3,reference_company_phone_3

reference_company_name	reference_education_school_name	reference_personal_name
reference_company_addr1	reference_education_major	reference_personal_relationship
reference_company_addr2	reference_education_degree	reference_personal_phone
reference_company_city	reference_education_from_date	reference_personal_phone
reference_company_state	reference_education_to_date	reference_personal_email
reference_company_postalcode	reference_education_city	reference_personal_addr1
reference_company_phone	reference_education_state	reference_personal_addr2
reference_company_supervisor	reference_education_postalcode	reference_personal_city
reference_company_supervisor_title		reference_personal_state
reference_company_jobtitle		reference_personal_postalcode
reference_company_from_date		
reference_company_to_date		
reference_company_last_salary		
reference_company_reasonleaving		

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Prepping Microsoft Word Documents

In Microsoft Word, open the document that needs to be prepped. Similar to PDF preparations, users will type the SmartSearch merge codes where the information should be merged in. For Word documents, the full merge code, including the "–" before and after the code is needed. The only codes that do not need the dashes are the ones specific to signatures.

When creating a signature field, use a text field, and name it "signhere". If you need more than one signature, use "signhere", "signhere2", "signhere3", etc. Similarly, for initials, name the text field "initialhere", "initialhere2", etc. Size the fields accordingly.

Note: To send prepped documents that are not located in SmartSearch, navigate to the email

Prepping Counter Sign

SmartSearch also supports countersigning. Simply label a field "countersignhere" or "counterinitialhere". SmartSearch will not ask the original signer to sign these fields. You may countersign from within the main product on the document tab.

When adding countersigning fields, there some basic naming rules. As indicated previously, there are special names for signature and counter-signature fields and initials. However, in addition to those, if you wish to designate any field, as something that should be completed by the counter-signer only, then start the field name with the word "counter".
For example: "counterdate", "countername", "counteridtype" etc. When you do this, the system will only present these fields to the counter signer. The original signer may not fill them in.

Before users can countersign a document, signature and initials must be created first. Do this by clicking TOOLS>My Signatures.
button (on the contact or candidate record) and send the document as an attachment.

Uploading Documents

Users can upload prepped documents right into SmartSearch. To upload documents, navigate to Admin>Configuration>Documents or navigate to documents directly from the main menu. Click Add New.

Note: If you are not able to upload documents, ask your system administrator to adjust the permissions.

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The information needed to upload a document are:

- Document Name,
- Document Description,
- Document Type,
- Document Category,
- Does the document contain merge codes?
- Does the document contain job-related merge codes?
- Does the document require signatures?
- Does the document allow image uploads when signing?
- Does the document require countersign?
- Is the document an I-9?

Then browse and upload the document.

After uploading the document, click the link labeled *preview/edit signing*. There users can fine-tune and add field helpers to the document, confirm/set whether a field is required, and set/confirm the tab order of each field.

Clicking on each field opens a popup window that allows you to resize the field or move a field to fine-tune its location on the page (just click on the provided arrows). You can indicate whether the field is required, and manually set the tab index of each field to controls the order in which the signer will move from field to field when signing the document. If the field is a text field, you may also indicate min and max field lengths, as well as setting a required format. Format options include Email, SSN, Date, Short Date (mm/yyyy), text-only, numeric-only and email.