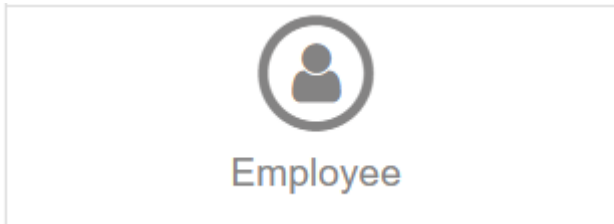


Signature Page or Custom Form Assignment

From your HR Dashboard

Click on Employee



Click on Custom Form

Employee Actions	Employee Maintenance	
+ Add New Hire - Self-Service Setup - Terminate Employee	- Employee Summary - Achievement - Alternate Rate - Certificate - Class - Class (rapid enroll) - Compensation	Custom Form - Direct Deposit Alt - Document (employee) - Document (company) - Education - Emergency Contact - Employment Screening - I-9 - License - Note - Position Organization - Property - Review - Skill - Time Off - W-4

Click on + Assign Employee to Documents

 **Integrity**
Data HRP™ HR Admin - Quick Links -

New

 Custom Form Service 

Status - ACTIVE

New

 PDF Signature Page Service 

Status - ACTIVE

+ Assign Employees to Documents

  Download

Click on

Process Type

Assign Employees to Custom Form / PDF

Choose Custom Form / PDF

 Custom Form Service  Status - ACTIVE

 PDF Signature Page Service  Status - ACTIVE

Company
 Ginger's Pet Care (GMPC)

Process Type 
Custom Form

Custom Form
Please Choose (represents BLANK) *

PDF Document
Please Choose (represents BLANK) *

 Save and proceed to Step 2

The  will give an explanation about Custom Forms and Signature Page PDF

Choose Custom Form / PDF

 Custom Form

 PDF Signature

Company
 Ginger's Pet

Process Type 
Custom Form

Choose a Process - Custom Forms or Signature Page PDF

Choose the type of process this assignment will be for: CUSTOM FORM or SIGNATURE PAGE PDF

Custom Forms need to be created and activated onto your account before they can be used here, but the Signature Page PDF process can be used with any PDF Company Document. A semi-custom page will be generated that includes a physical e-Signature and (optional) custom text for the signature page which will be APPENDED to the end of the PDF document.

These are separate services and can be independently activated on your account. Talk with your provider today!

Click the  to close the information box

Click on the dropdown arrow and select Signature Page PDF or Custom Form, (whichever you want to assign for signature)

Assign Employees to Custom Form / PDF

Choose Custom Form / PDF

 Custom Form Service  Status - ACTIVE

 PDF Signature Page Service  Status - ACTIVE

Company
 Ginger's Pet Care (GMPC)

Process Type 
Custom Form

Custom Form
Please Choose (represents BLANK) *

PDF Document
Please Choose (represents BLANK) *

 Save and proceed to Step 2

Custom Form

Signature Page PDF

Click on the Custom Form drop down arrow and select the Custom Form or Signature Page PDF that you want to send.



You can only select a Signature Page PDF if you uploaded it to your Company Documents. You can only select a Custom Form if you requested that it be created and added to your documents, (additional charges may apply for Custom Forms)

Choose Custom Form / PDF

New Custom Form Service  Status - ACTIVE

New PDF Signature Page Service  Status - ACTIVE

Company

Ginger's Pet Care (GMPC)

Process Type 

Custom Form

Custom Form

Please Choose (represents BLANK)

Please Choose (represents BLANK)

Mutual Arbitration Policy

RITW Prev 319

Here, we have selected Signature Page PDF and we are selecting PDF Document to attach the Review Summary for the employee Signature

Choose Custom Form / PDF

New Custom Form Service  Status - ACTIVE

New PDF Signature Page Service  Status - ACTIVE

Company

Ginger's Pet Care (GMPC)

Process Type 

Signature Page PDF

Custom Form

Please Choose (represents BLANK)

PDF Document

Please Choose (represents BLANK)

Please Choose (represents BLANK)

review summary _26_.pdf

Click on Save and proceed to Step 2

Choose Custom Form / PDF

New Custom Form Service  Status - ACTIVE

New PDF Signature Page Service  Status - ACTIVE

Company

Ginger's Pet Care (GMPC)

Process Type 

Signature Page PDF

Custom Form

Please Choose (represents BLANK)

PDF Document

review summary _26_.pdf

  Save and proceed to Step 2

The Assign Employees to Custom Form/PDF Employee List Builder will open

Assign Employees to Custom Form / PDF

Choose Custom Form / PDF

New Custom Form Service  Status - ACTIVE

New PDF Signature Page Service  Status - ACTIVE

Company

 Ginger's Pet Care (GMPC)

Custom Form

 Please Choose (represents BLANK) *

Process Type 

 Signature Page PDF

PDF Document

 review summary _26_.pdf

Choose Employees to Assign Documents to

Employee List Builder

Employees (check active employees with email addresses)

 Please Choose (represents BLANK)

Position

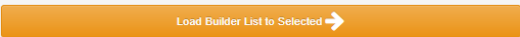
 Please Choose (represents BLANK)

Division

 Please Choose (represents BLANK)

Department

 Please Choose (represents BLANK)



Selected Employees

 Employee



You have the option of selecting 1 employee/all employees/employees in a specific position/ employees in a specific division/ employees in a specific department

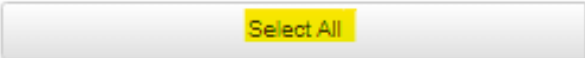
Choose Employees to Assign Documents to

Employee List Builder

Employees (check active employees with email addresses)

 Please Choose (represents BLANK)



Moore, Lorene (1)

Lynn, Kelli (220)

Matthews, Chris (221)

Doe, Jane (222)

 Please Choose (represents BLANK)

Position

Please Choose (represents BLANK) ▼

Please Choose (represents BLANK)

Accountant - Accountant

Division

Please Choose (represents BLANK) ▼

Please Choose (represents BLANK)

Acct - Accounting

Admin - Administrative Office

COM - Commercial

Department

Please Choose (represents BLANK) ▼

Please Choose (represents BLANK)

Accounting - Accounting

Comm - Commercial

Cust - Custom Homes

Here, we are assigning a specific employee to a Signature Page PDF

Choose Employees to Assign Documents to

Employee List Builder

Employees (check active employees with email addresses)

Matthews, Chris (221) ▼

Click on Load Builder List to Selected. This will the employee/employees to the Selected Employees list

Choose Employees to Assign Documents to

Employee List Builder

Employees (check active employees with email addresses)

Please Choose (represents BLANK)

Position

Please Choose (represents BLANK)

Division

Please Choose (represents BLANK)

Department

Please Choose (represents BLANK)

Load Builder List to Selected

Selected Employees

Employee
Matthews, Chris (221)

Click on Assign Form to Selected Employees

Assign Form to Selected Employees

You will be taken back to the Custom Form/PDF Signature Service page, and you can see the assigned form, the date it was assigned and the status of the form

New Custom Form Service Status - ACTIVE

New PDF Signature Page Service Status - ACTIVE

Assign Employees to Documents Download

filter grid...

All Statuses

Actions	Name	Form/PDF	PDF Signing	Download	Form Date	Status	Assignment
	Matthews, Chris (221)	Sample for PDF signature	No Yes			New	03/29/2022

The employee will receive an email notification

Ginger's Pet Care - Sample for PDF signature - Assigned, Requesting Comp...



Ginger's Pet Care

Sample for PDF signature - Assigned - Completion Requested for: Matthews, Chris

Employees may view, complete, and e-sign all assigned forms by clicking [here](#)

When the employee logs into their profile/My HR, they will see the form that is waiting for their signature

Employee Service

knowledge

My Upcoming Classes - Matthews, Chris (221)

No classes in upcoming months

My Expiring Certifications - Matthews, Chris (221)

No certificates expiring in upcoming months

My Expiring Licenses - Matthews, Chris (221)

No licenses expiring in upcoming months

My Assigned Custom Forms - Matthews, Chris (221)

Form

Open/Sign

Sample for PDF signature

When the employee clicks on Open/Sign they will be able to open the document to review it and then E-Sign the document and Save and Submit

Document: review_summary_26_.pdf

Document

Sample for PDF signature

Complete each section. Don't worry, we'll tell you if you forget anything important.

Please click the link below to view the document that you are about to acknowledge receipt of.

Sample for PDF signature

Name

First Name

Chris

Last Name

Matthews

Acknowledgment

Company Name

Ginger's Pet Care

By signing this document, you acknowledge receiving and/or reviewing the contents of the document.

E-Signature

I have read my rights under the (E-Sign Act). By typing my name below, I understand I am electronically signing this document, agreeing to its terms, and certifying that all information I provided is true and correct to the best of my knowledge.

Type your name here

E-Sign Name

Form Date

03/29/2022

Form - Submission

This form will become Read-Only after submission. Any changes will need to be made by creating a new form. Click below to lock this form and send a notification to HR.

Save and Submit

Form - Attached PDF

PDF will be generated for download after it has been submitted for approval.

Form

Download	Filename	Size (KB)	Date	Remove Link
----------	----------	-----------	------	-------------

Document: review_summary_26_.pdf

Prev Record

Next Record

Close

Page 7 of 11

The employee will see that the status of the form is Submitted

New

Custom Form Service

Status - ACTIVE

New

PDF Signature Page Service

Status - ACTIVE

Download

filter grid...

All Statuses

Actions	Form/PDF	PDF Signing	Download	Form Date	Status	Assignment
	Sample for PDF signature	No Yes		03/29/2022	Submitted	03/29/2022

If the employee navigates back to their My HR Dashboard, they will not see the form under My assigned Custom Forms anymore

Employee Service

My Upcoming Classes - Matthews, Chris (221)

No classes in upcoming months

My Expiring Certifications - Matthews, Chris (221)

No certificates expiring in upcoming months

My Expiring Licenses - Matthews, Chris (221)

No licenses expiring in upcoming months

My Assigned Custom Forms - Matthews, Chris (221)

No form signing requests

When the form has been submitted, you will receive an email

Ginger's Pet Care - Sample for PDF signature-Signed - Submitted, Requesti...

N

no-reply@integrity-data.com

To

klynn@idhrptest.com

;

lmoore@idhrptest.com

↩

↶

→

...

6:57 AM

Ginger's Pet Care

Sample for PDF signature-Signed - Submitted - Approval Requested for: Matthews, Chris

Admins may view and respond to all forms by clicking [here](#)

From your HR Dashboard, you will see the submitted form waiting for approval, Click on Open/Approve

Dashboard

Manage

Employee W-4s (Pending)

No pending W-4s

Scheduled Reviews

Scheduled	Employee	Type
03/20/2022	 Matthews, Chris (221)	Performance Appraisal

Certificate Expirations

No certificates expiring in upcoming months

License Expirations

No licenses expiring in upcoming months

Custom Forms (Submitted)

Date	Employee	Form	Open/Approve
03/29/2022	Matthews, Chris (221)	Sample for PDF signature	

You can see the Signature and date it was signed, Download the document if needed and Approve or Reject the Form

Document: [review summary _26_.pdf](#)

Document

Sample for PDF signature

Complete each section. Don't worry, we'll tell you if you forget anything important.
Please click the link below to view the document that you are about to acknowledge receipt of:

Sample for PDF signature

Name

First Name

Chris

Last Name

Matthews

Acknowledgment

Company Name

Ginger's Pet Care

By signing this document, you acknowledge receiving and/or reviewing the contents of the document.

E-Signature

I have read my rights under the (E-Sign Act). By typing my name below, I understand I am electronically signing this document, agreeing to its terms, and certifying that all information I provided is true and correct to the best of my knowledge.

Type your name here

Chris Matthews

Form Date

03/29/2022

Chris Matthews

Form - Attached PDF

PDF will be generated for download after it has been submitted for approval.

Form

Download	Filename	Size (KB)	Date	Remove Link
	review summary _26_.pdf	240	03/29/2022	

Manager Approval

Click below to change the status of this form.

Approve Form

Reject Form

When you have Approved or Rejected the form, you will see that the Status has changed

New Custom Form Service Status - ACTIVE

New PDF Signature Page Service Status - ACTIVE

Assign Employees to Documents

Download

Filter grid...

All Statuses

Actions	Name	Form/PDF	PDF Signing	Download	Form Date	Status	Assignment	Approved/Rejected	Approved/Rejected By
	Matthews, Chris (221)	Sample for PDF signature	No Yes		03/29/2022	Approved	03/29/2022	03/29/2022	klynn@dhpreast.com

Click on the Integrity logo to navigate back to your HR Dashboard

You will see that there isn't any open document signing requests now

Employee Service

My Time Off - Lynn, Kelli (220)

My Document Signing Requests - Lynn, Kelli (220)

No open document signing requests

My Upcoming Classes - Lynn, Kelli (220)

No classes in upcoming months

My Expiring Certifications - Lynn, Kelli (220)

Page 10 of 11

The employee will receive an email notification letting them know the form has been approved

Ginger's Pet Care - Sample for PDF signature-Signed - Approved for: Matth...



no-reply@integrity-data.com

To cmatthews@idhrptest.com



8:19 AM

Ginger's Pet Care

Sample for PDF signature-Signed - Approved for: Matthews, Chris

Employees may view all assigned forms by clicking [here](#)