

Department of General Services

Onboarding Forms in Adobe Sign

User Guide
for Attendance Clerks



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Overview

Attendance Clerks are responsible for sending Onboarding documents to new employees. In an effort to increase automation and develop innovative tools, the Office of Human Resources (OHR) has developed a process in Adobe Sign to allow forms to be completed and signed digitally by new employees, supervisors, and Personnel Transaction Unit (PTU) staff.

Documents are grouped together according to document type (e.g., Employee Information, Appointment, Benefits, Policies) and employee type (e.g., New to State, Transfer to Another Agency, etc.) These groupings are called Workflows in Adobe Sign.

Employees will be able to complete and digitally sign the documents contained in the workflow. The documents will then be routed for signature to their supervisor when needed, and then to the Personnel Specialist to complete processing.

On the first day of employment, signature fields must be added to the employee's Duty Statement and Application Package **prior to** attaching to the Employee Information workflow. Instructions are provided below in Create Templates and Add Signature and Signer Info Fields sections.

The Attendance Clerk may need to send documents not included in the provided workflow templates. In these situations, the Attendance Clerk will be responsible for setting up the Recipients, adding instructions to the email message and attaching the appropriate documents.

Attendance Clerks will be responsible for ensuring the proper documents are completed and signed by the employee and supervisor and then received by PTU for processing.

Once a confirmation email has been received from Adobe Sign notifying that an employee has signed and completed all onboarding documents, the Attendance Clerk, supervisor and Personnel Specialist must delete all copies of documents from their email, computer or laptop to ensure the security of the employee information.

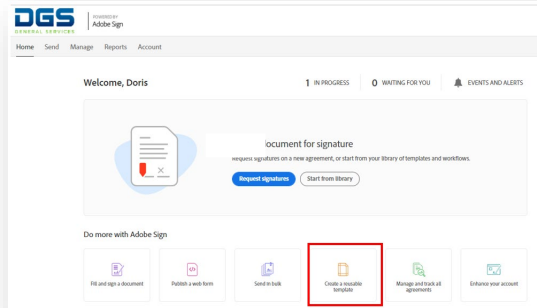
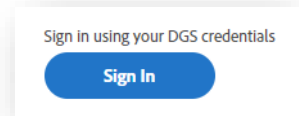
Reminder:

Per the Information Security Policy Acknowledgement that DGS employees are required to sign upon completion of the Information Security and Privacy Awareness Training, DGS employees agree to comply with the requirements indicated in the applicable information security and privacy laws, policies, and standards as it pertains to assignments with DGS and agree to follow DGS standards for handling information securely, including guarding against unauthorized disclosure, modification and/or disposal.

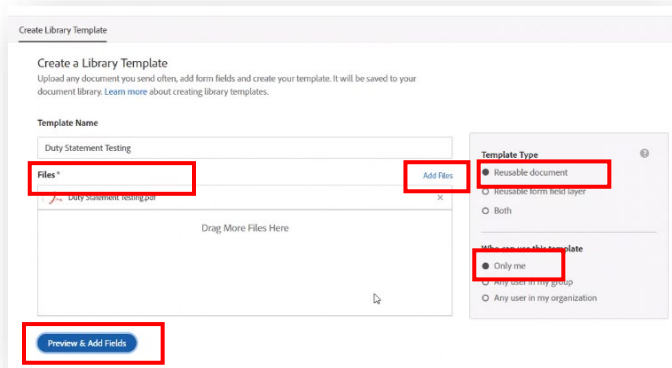
For more information on Privacy, click [here](#). For the IT Policy Manual, click [here](#).

Create Templates

1. Log in to [Adobe Sign](#) by clicking the Sign In button beneath 'Sign In using your DGS Credentials'. Contact ETS with any difficulties logging in.
2. From the Home tab on the Welcome page, click 'Create a reusable template' icon to open the 'Create a Library Template' page.



- a. Type the name of the document in the 'Template Name' field. Adding the last name and initial of the new employee is recommended to identify the documents for a specific employee.
 - b. Drag a file from the folder/desktop and drop into Files field OR you can click on the Add Files link and upload the appropriate file. Uploaded files cannot be in a fillable format to add. Use the "Microsoft Print to pdf" option under the Print menu to flatten the file prior to uploading. Note: *although multiple files can be added, only one file should be added to the Library Template at a time.*
 - c. Under 'Template Type', default option 'Reusable Document' should be selected.
 - d. Under 'Who can use this template', default option 'Only Me' should be selected so the document is not accessible to others using Adobe Sign.
3. Click on Preview & Add Fields button.

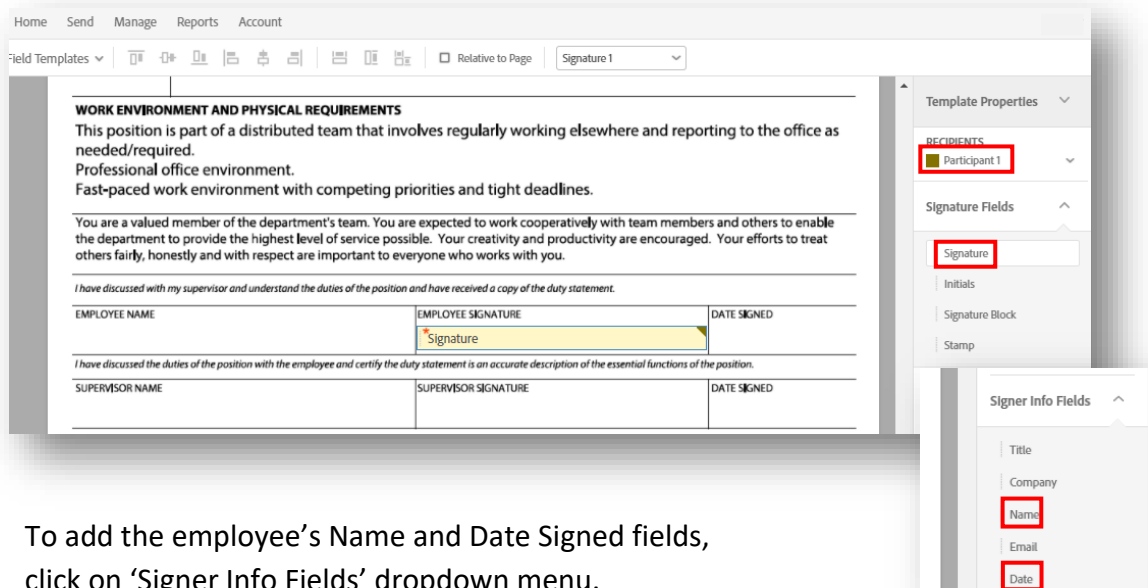


Add Signature and Signer Info Fields

Things to know when adding Signature and Signer Info fields:

- Participants are the same as the Recipients and are listed in that same order. (Recipient 1 = Participant 1, Recipient 2 = Participant 2, etc.)
- In most cases, Participant 1 represents the Employee that will be receiving and signing the forms.
- Each Participant is assigned a color, as indicated in the Recipients menu. The top right corner of each field corresponds to the assigned color for that Participant.

1. On the right-side under 'Recipients' dropdown menu, select the appropriate 'Participant'.
 - a. Click on 'Signature Fields' dropdown menu.
 - b. Click and hold 'Signature' to drag and drop the signature box to the appropriate signature field on the template.



- c. To add the employee's Name and Date Signed fields, click on 'Signer Info Fields' dropdown menu.
 - d. Drag and drop selection to the corresponding fields on the form. Example: 'Name' to EMPLOYEE NAME field, or 'Date' to DATE SIGNED field. These fields will automatically populate with the Recipient's information at the time of signing.
2. If Signature or Signer Info Fields are needed for more than one Participant, return to the 'Recipients' dropdown menu and select another participant. If the desired Participant number is not available (default is Participant 1 and Participant 2), click on the plus sign to 'Add Another Participant'. Repeat step 1 (above) and proceed to add fields.

In the example below, Participant 3 represents the Supervisor that will be signing the forms. (Participant 1 represents the Employee and Participant 2 represents the Attendance Clerk.)

The screenshot shows the Adobe Sign interface for editing a form. The form content includes:

WORK ENVIRONMENT AND PHYSICAL REQUIREMENTS
 This position is part of a distributed team that involves regularly working elsewhere and reporting to the office as needed/required.
 Professional office environment.
 Fast-paced work environment with competing priorities and tight deadlines.

You are a valued member of the department's team. You are expected to work cooperatively with team members and others to enable the department to provide the highest level of service possible. Your creativity and productivity are encouraged. Your efforts to treat others fairly, honestly and with respect are important to everyone who works with you.

I have discussed with my supervisor and understand the duties of the position and have received a copy of the duty statement.

EMPLOYEE NAME	EMPLOYEE SIGNATURE	DATE SIGNED
Full Name	Signature	Date

I have discussed the duties of the position with the employee and certify the duty statement is an accurate description of the essential functions of the position.

SUPERVISOR NAME	SUPERVISOR SIGNATURE	DATE SIGNED
	Signature	

The right-hand sidebar shows 'Template Properties' with 'RECIPIENTS' set to 'Participant 3', which is highlighted with a red box. Below it are sections for 'Signature Fields' (Signature, Initials, Signature Block, Stamp) and 'Signer Info Fields'.

3. Click Save when all fields have been added to continue in the process. The form will be available in the Template Library for use in the Workflow.

Send Documents with a Workflow

1. From the Home tab on the Welcome page, click on 'Start from library' button.

The screenshot shows the Adobe Sign 'Welcome, Doris' page. At the top, it says 'Welcome, Doris' and has status indicators: '1 IN PROGRESS', '0 WAITING FOR YOU', and 'EVENTS AND ALERTS'. The main content area features a document icon with a red checkmark and the text 'Send a document for signature'. Below this, it says 'Request signatures on a new agreement, or start from your library of templates and workflows.' There are two buttons: 'Request signatures' and 'Start from library', with the latter highlighted by a red box.

2. On the 'Start from library' screen, click on 'Workflows' (left side menu). Select the appropriate workflow, then Start to open the template.
 - a. Recipients - Enter the corresponding email addresses in each of the fields: 'Signer' (Employee), 'Supervisor' and 'Personnel Specialist'. Note: Most workflows include the Attendance Clerk email as the person who is sending the workflow.
 - b. Document Name – Type in the employee's First Name and Last Name, followed by the name of the workflow (name of workflow will automatically populate). For example, in the screenshot below, the Document Name should be: "FIRST NAME LAST NAME – Employment Information".

- c. Message – This field will automatically populate. Check the content of the Message, as information relative to the employee’s position may need to be added by the Attendance Clerk.
- d. Files – The required documents sent in the workflow are listed in the File section. If a file is required to be attached by the Attendance Clerk, the Add File option will appear instead of the file name. **NOTE:** These documents will need to have the Signature and Signer Fields added and uploaded into the Templates prior to beginning the workflow. See the [Create Templates](#) section of this User Guide for instructions.
Click the Add File link in blue to search for the appropriate document in the My Templates section. Select the file name and click ‘Open’ to add.
- e. Options - A reminder email can be sent to the employee if the documents have not been returned in time. Check the ‘Set Reminder’ box in the ‘Options’ section to view the list of frequencies available.

Employment Information

How this workflow works?
These forms must be completed within 5 business days of employee hire date. Please send to the employee on their 1st day. Fill in the unique details in the Message section before sending.

Send from: OHR (Primary Group)

Recipients

Signer*
Enter recipient email [Email]

Attendance Clerk*
Myself [Email]

Supervisor*
Enter recipient email [Email]

Personnel Specialist*
Enter recipient email [Email]

Document Name*
Employment Information

Options
 Set Reminder

Message*
Welcome to DGS!
The Department of General Services serves as the business manager for the state of

Files

DUTY STATEMENT (DGS OHR 907/907A)*	Add File <- Upload
ESSENTIAL FUNCTIONS HEALTH QUESTIONNAIRE (STD 910)*	ESSENTIAL FUNCTIONS HEALTH QUESTIONNAIRE (STD 910)
APPLICATION PACKAGE (STD 678)*	Add File <- Upload

Send

- Click Send to start the workflow by sending the documents to the Signer / New employee.

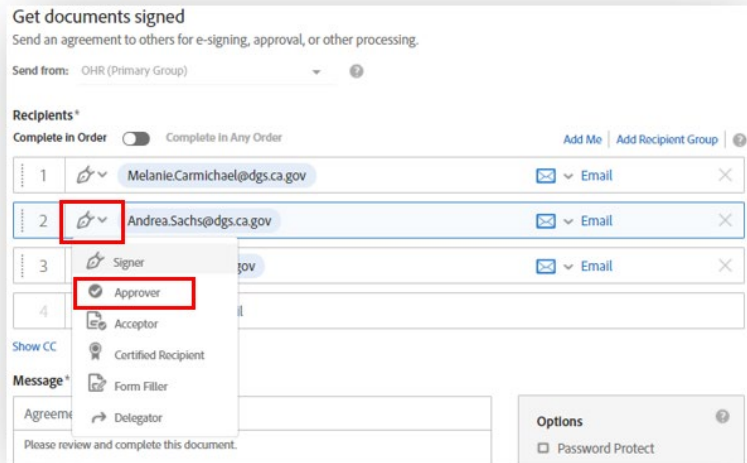
Send Documents without a Workflow

There may be situations where documents need to be sent outside the developed workflow templates. For example, if an employee has made an error on a form and they need to complete or sign the form again, the Attendance Clerk can send the document(s) as needed.

- On the Welcome page, click on the Request Signatures button. The 'Get documents signed' screen will appear.
 - Enter recipient email addresses in the order in which they should receive the workflow. The employee's email address should be entered in the first Recipient field and must be a DGS email address. Note: Typing an email address in the first Recipient field will prompt a second Recipient field to automatically appear; a third field will appear upon typing in the second field, and so forth.

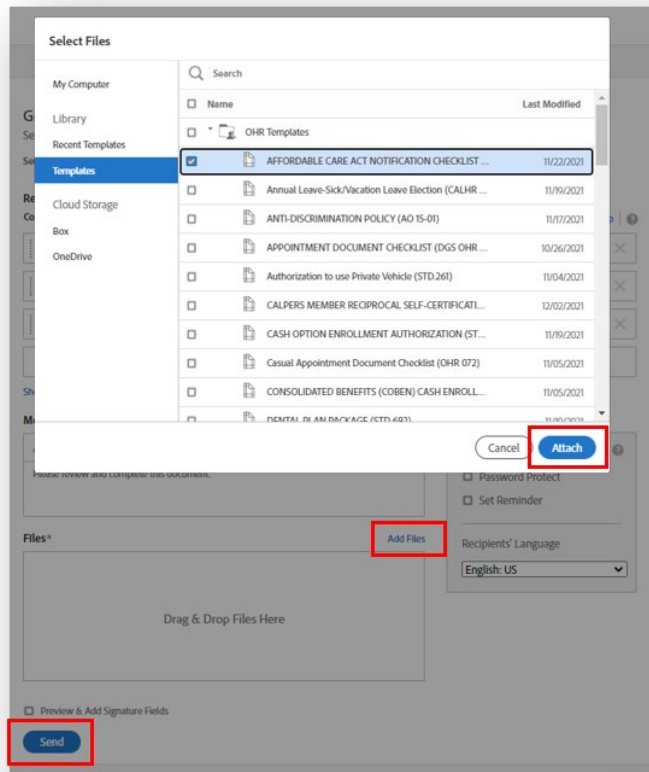
The screenshot displays the 'Get documents signed' interface. At the top, it says 'Send an agreement to others for e-signing, approval, or other processing.' Below this, the 'Send from' is set to 'OHR (Primary Group)'. The 'Recipients' section is titled 'Recipients*' and includes a toggle for 'Complete in Order' (currently off) and a link to 'Add Recipient Group'. There are three recipient rows, each with a pen icon dropdown, an email address, and an 'Email' button. The email addresses are: 1. Melanie.Carmichael@dgs.ca.gov, 2. Andrea.Sachs@dgs.ca.gov, and 3. Jenna.Rink@dgs.ca.gov. Below these is a fourth row with a pen icon dropdown and the text 'Enter recipient email'. The 'Message*' section contains a text area with 'Agreement Name' and 'Please review and complete this document.' The 'Files*' section has a 'Drag & Drop Files Here' area. On the right, the 'Options' section includes checkboxes for 'Password Protect' and 'Set Reminder', and a 'Recipients' Language' dropdown set to 'English: US'. At the bottom left, there is a 'Send' button and a checkbox for 'Preview & Add Signature Fields'.

- Each recipient's responsibility is set to 'Signer' by default. The employee's responsibility should remain as 'Signer'. All other recipients' responsibilities should be changed to 'Approver'. To change the responsibility for a recipient, click on the Pen dropdown menu (next to the email address) and select the appropriate responsibility.



Things to know when adding Recipient email addresses:

- Recipients must be listed in the same order as the Participants on the forms. (Recipient 1 = Participant 1, Recipient 2 = Participant 2, etc...)
 - The employee’s email address must be a DGS email address for security purposes.
 - To change the Recipient order, select and drag any of the Recipient fields to the desired order.
 - To notify an additional person who will not be signing or approving any forms, click on the Show CC link and enter their email address.
- c. Message - Type a message in the ‘Message’ field.
- d. Files - Drag and drop files in Files field or click on the blue Add Files link to select a template from the Templates Library. Then click on Attach.

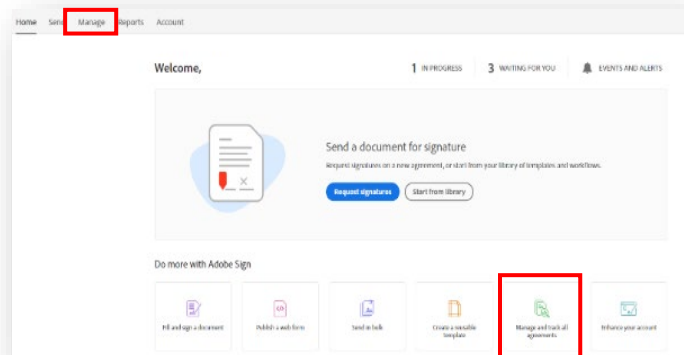


- e. Options - Password protecting the documents is not recommended due to complications in retrieving files in Adobe.
- f. Click Send to start the workflow by sending the documents to the Signer / New employee.

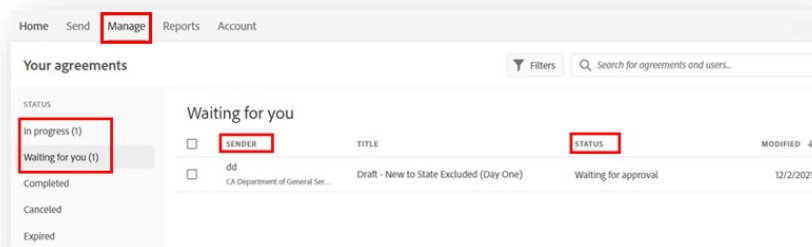
Check Status of Workflows

1. There are two ways to view agreements in progress.

- a. From the Welcome screen, click on the 'Manage' tab at the top OR the 'Manage and track all agreements' icon.
- b. The 'Waiting for you' status screen will appear. The workflows listed on this screen are awaiting your action.



- c. Select and click on a workflow. A list of 'Actions' will appear on the right side.
2. To view the status of agreements sent to other Recipients, click on 'In progress' under the 'Status' menu. A list of workflows will appear along with their status and the name of the recipient who needs to take action.



If A Sender is Out of Office

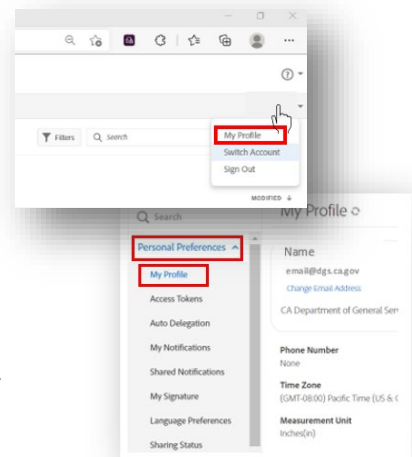
A delegate must be set up as an alternate or backup in case the Sender (Attendance Clerk) is unavailable or out of office. If the Sender's alternate or backup has not been added to the OHR group in Adobe Sign, a ticket must be submitted under "Adobe Sign Access" in the ServiceNow catalog to request access.

How to Share an Account

The original sender will need to share their Adobe Sign account with their alternate or backup prior to being out of office by following the steps below. This is recommended at the time the account is setup in case of unexpected absences.

The alternate/backup will be able to view the agreements by accessing the shared Adobe Sign account.

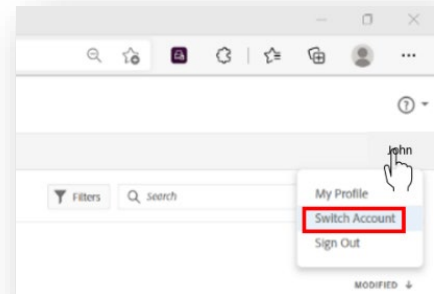
1. Hover over name (upper right corner) and select 'My Profile' from the dropdown menu.
2. On 'My Profile' page, open the 'Personal Preferences' dropdown menu on the lefthand side. Click on 'Sharing Status' to see who the account is shared with. To add a DGS employee as a backup, click on the plus '+' icon in the upper right corner.



3. In the 'Share My Account' pop up window, enter the backup's email address.
 - a. Select the option 'Sending' underneath 'Additional Permissions beyond Viewing'. This automatically selects the 'Modifying existing transactions' box below it.
 - b. Click Save. The alternate will now appear in the list of available users to share the account with.

How to Access a Shared Account

1. Log in to Adobe Sign, and click on the 'Manage' tab.
 - a. Hover over the user's name in the upper right corner and a pop-up window will appear. Select 'Switch Account'.
2. In the 'Switch Account' pop-up window, select the email address to access the account and click OK. The original sender's agreements are now available to select in the Your Agreements section.
3. To switch back, click on 'Show my account' in the blue bar.

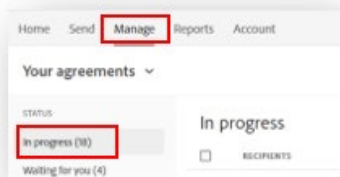


If A Recipient is Out of Office

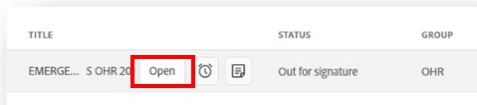
If a Recipient is out of office, the Sender can log into Adobe Sign and re-route a workflow to an alternate recipient as outlined in the section below.

This can only be done when the recipient being replaced is next in line in the workflow.

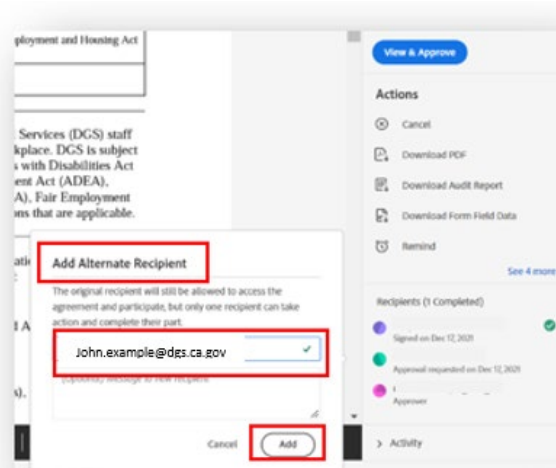
1. On the 'Manage' tab, click on 'In Progress' on the left side to view the list of workflows in progress.



- Click on or hover over the agreement to view the Options menu or icons. Click on 'Open' to open the documents in the workflow.



- On the righthand side under the 'Recipient' section, hover over the name of the recipient being replaced. Then click on the blue 'Add Alternate Recipient' link to open the pop-up window. Enter the email address of the alternate recipient and click 'Add'. The alternate recipient will receive an email notification that their signature or approval is required.



Cancel Workflow or Send Reminder

- The sender may cancel a workflow while it is still in progress or send a reminder to the Recipient.
 - While viewing the items 'In progress', click on the selected workflow.
 - From the 'Actions' menu on the right side, click on 'Cancel' or 'Remind'.