Admin Training

webonboarding

Documents guide

What kind of documents can I have in my Webonboarding?

Exchange document.

A document which you send to the Onboardee to complete and return. E.g. Confidential medical questionnaire, HMRC checklist.

OR

A document which you want the Onboardee to provide you with. E.g. Copy of driving licence, copy of Passport, copy of Birth Certificate.

Reading list item.

A document which you provide to the Onboardee to read as part of their induction or on pre-joining. E.g. A policy document or some other document which is a requirement of the Onboardee by the company.

Offer letter.

The formal offer of employment which usually follows a verbal offer and which accompanies the contract of employment. The letter will be signed by the organisation. There is usually no requirement for the Onboardee to sign this, they will sign the contract.

Contract.

The contract of employment which is issued to all employees regardless of employment status. Some organisations will have a different contract for managers or directors than for employees. The contract will be signed by the hiring organisation and by the Onboardee.

Signed documents.

A signed document is a statement/policy you want the onboardee to digitally sign. You can add these in addition to the signed contract.

How to upload contracts, offer letters and additional signed documents.

This should already be completed by your implementation consultant, however, should you need to upload any contracts you can do so.

Click documents on left-hand side of the screen.

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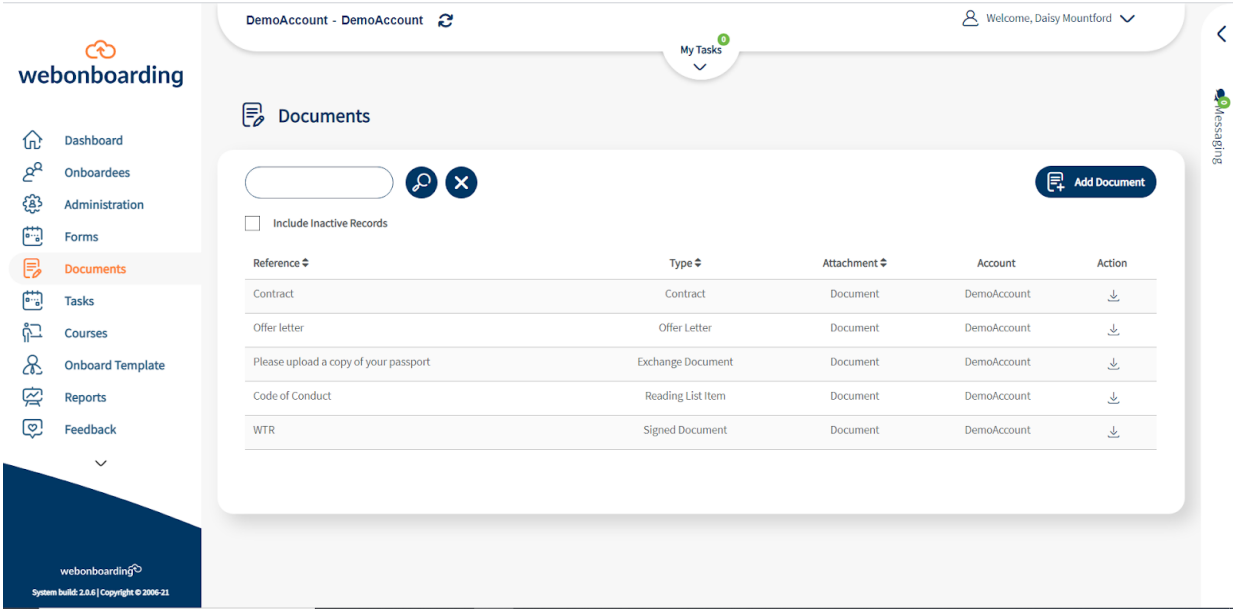
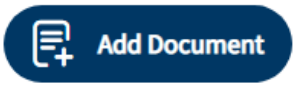


You can then click “add document”.



First you must prep the document outside of Webonboarding using microsoft word, add the unique text (this is what Docusign will use to find where to add the signature) and enter any merge fields. The merge field dictionary can be found underneath the “document type” drop down.

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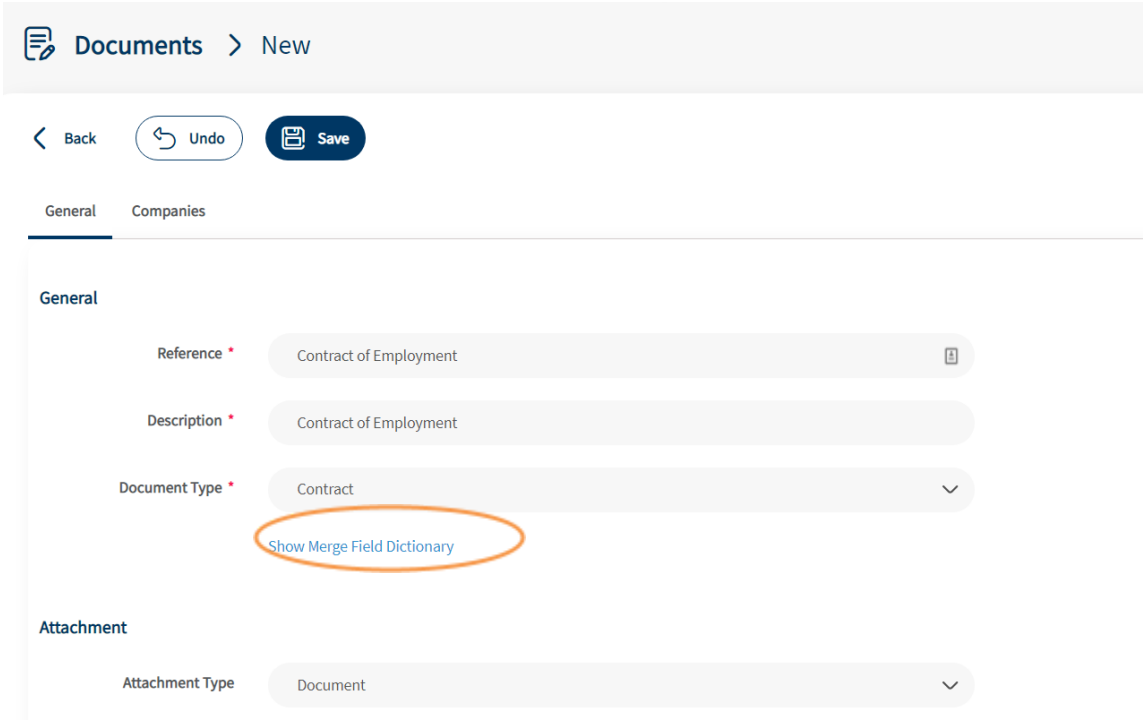

You can add a signature field anywhere on the contract document as the system will pick up unique text for example “signed:” / “signature:”.

You can also add an initials field and date signed field with the same principle.

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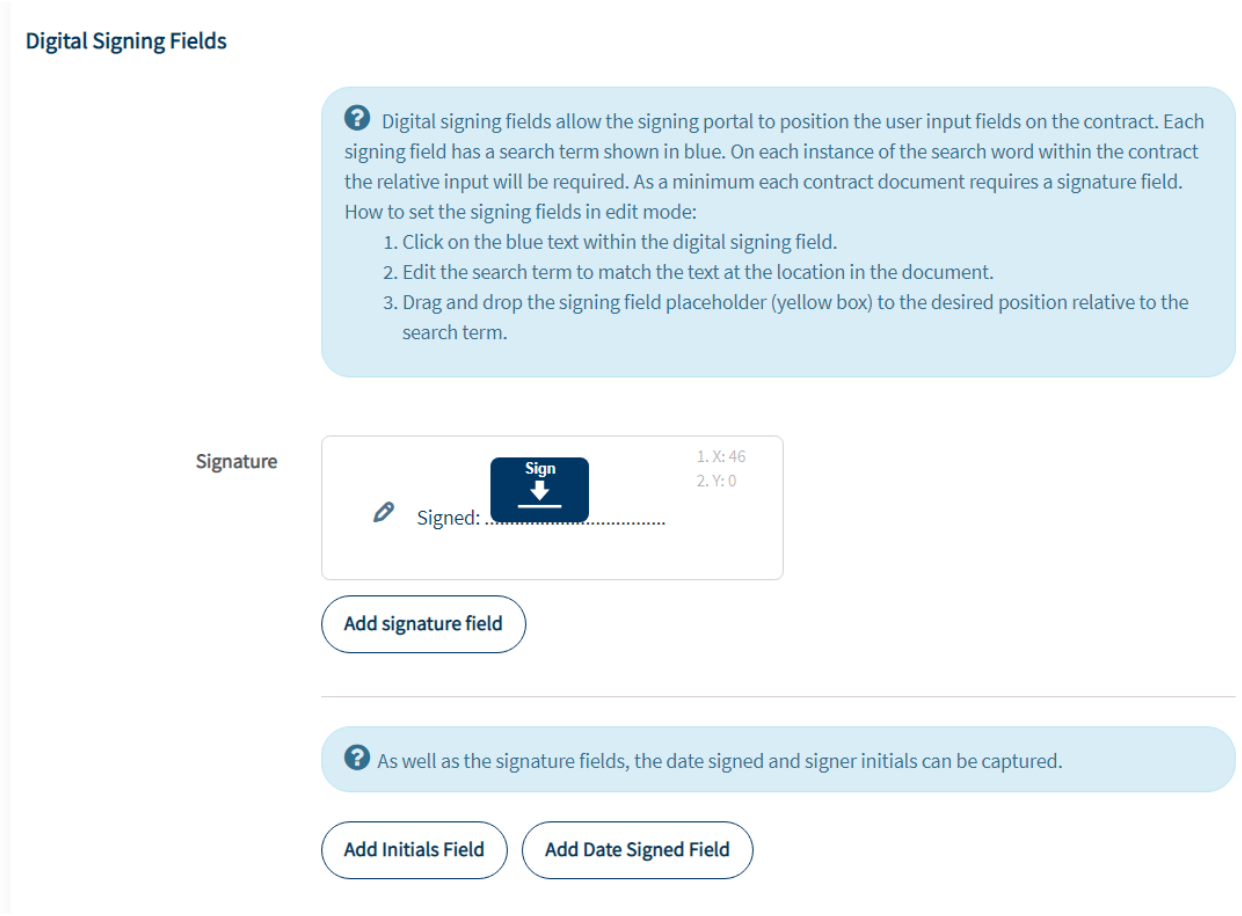
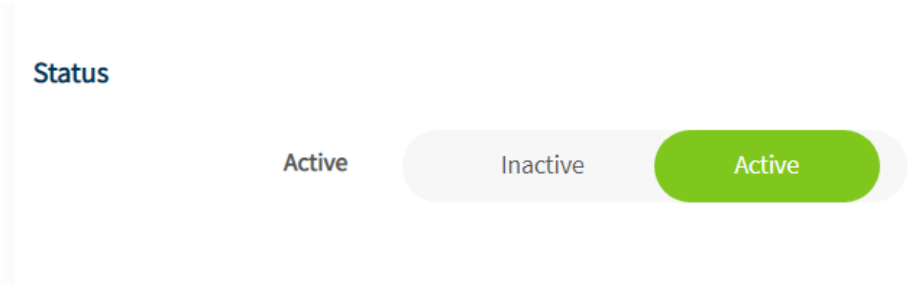


Once the document is ready to upload select the file and upload.

Ensure that the Active box is ticked, this ensures that the new document is available for use.



You can assign the contacts and offer letters to specific companies using the companies tab.

Click Save.

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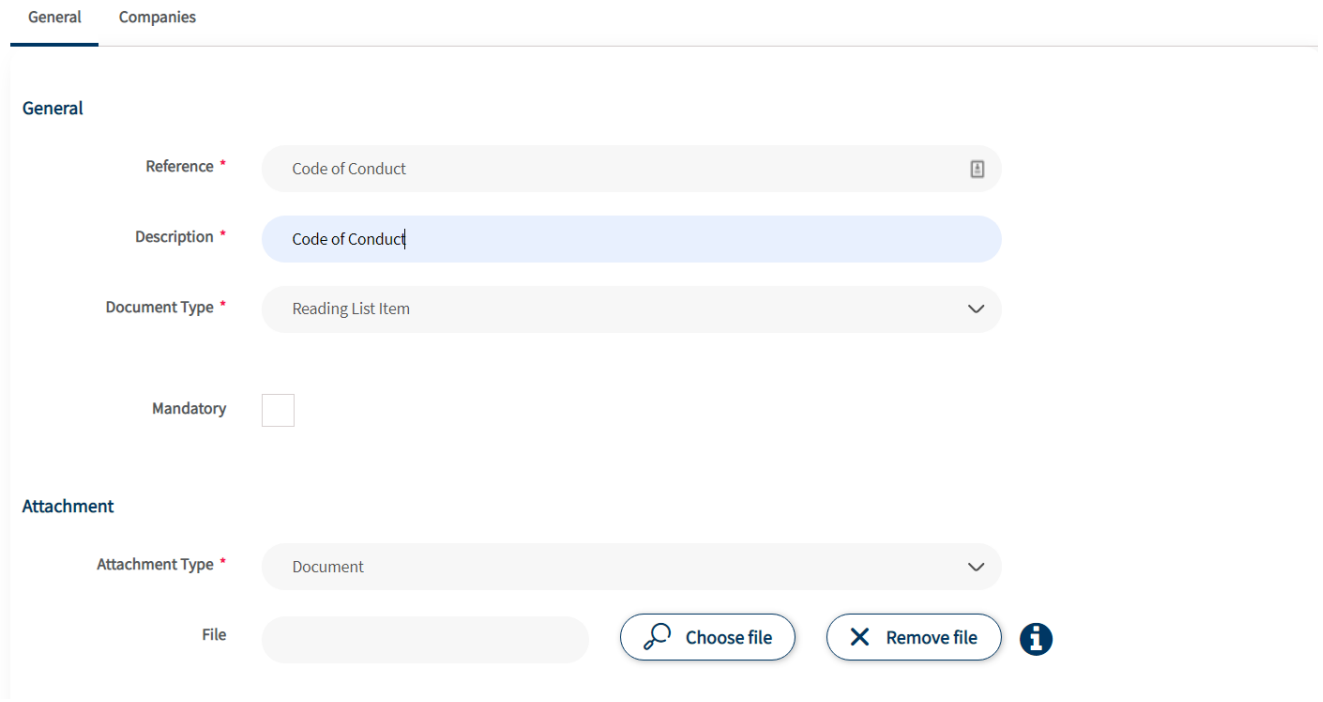
How to upload other documents.

If “Exchange Document” or “Reading List” is selected as the “Document Type” , then the screen will change



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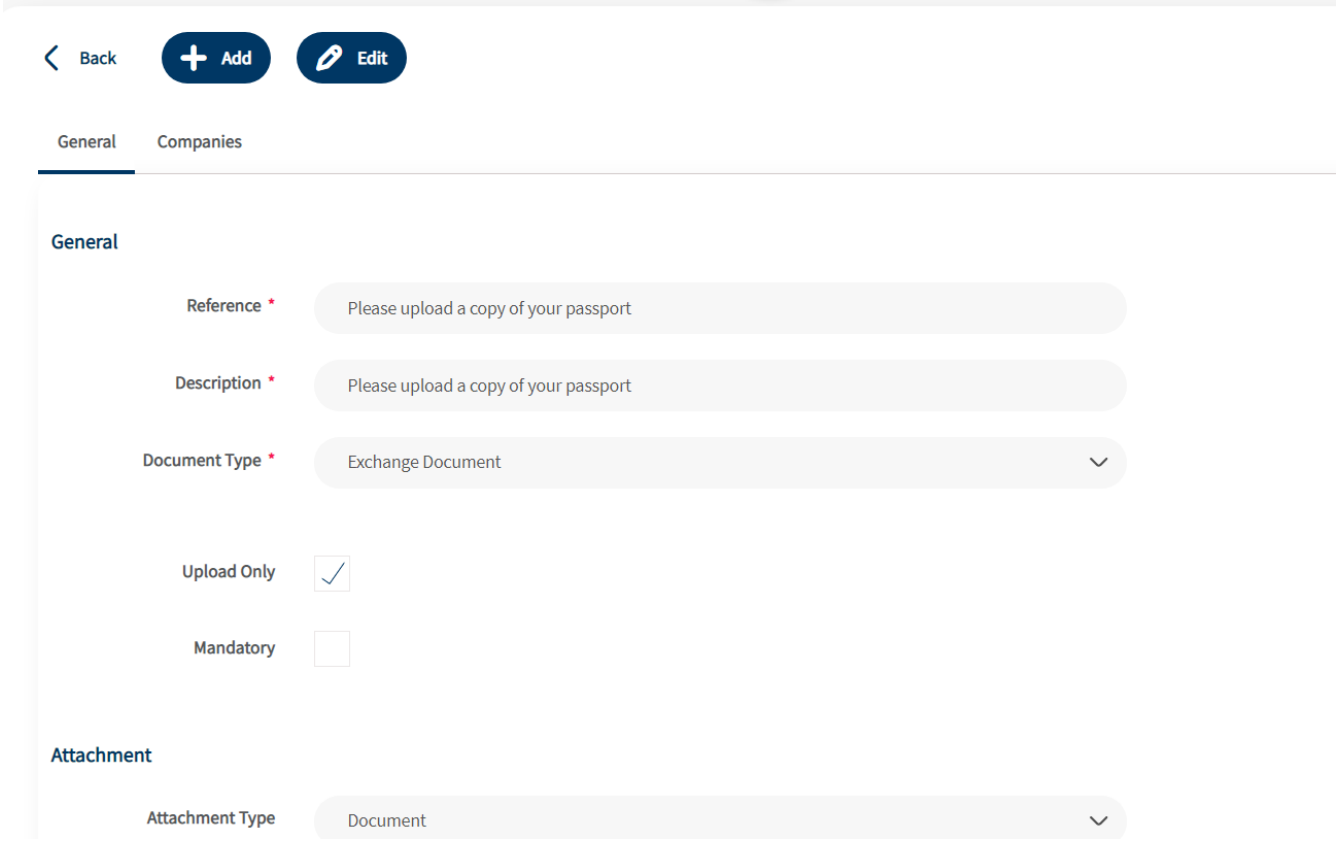
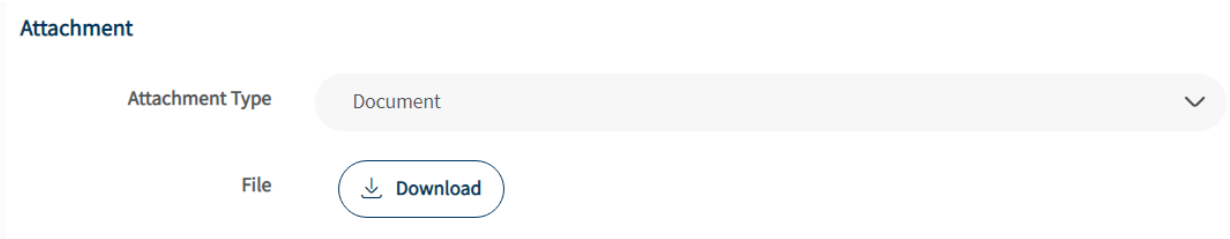
Documents guide



You can indicate if the document is to be Upload only (the onboardee importing an item into the system) and/or Mandatory.

If it is not an Upload only document, then you can choose whether this is a Document or a Web-Link under “Document Type”.

If you select Document from the drop down menu, then click, Choose File and navigate to the relevant document and double click to select and upload.



If Web-Link is selected, then enter the URL of the document into the field provided.

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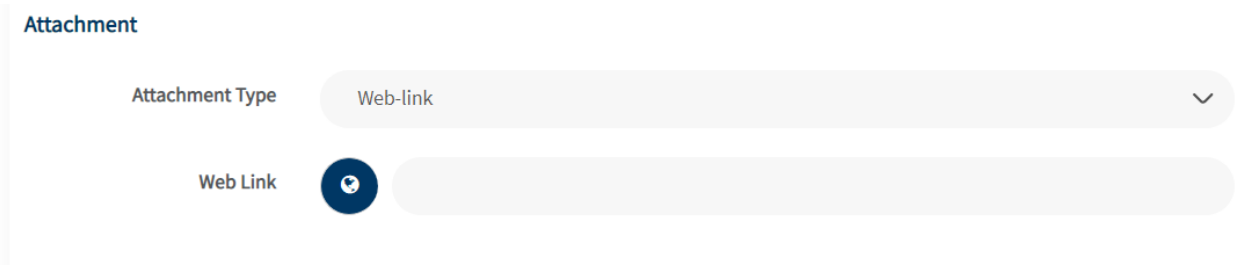
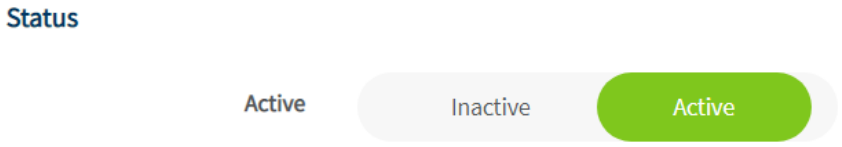


Ensure that the Active box is ticked, this ensures that the new document is available for use.



The field labelled System Account Name will populate with your Organisation Account name once the record has been saved.

Before being able to save you must select the Companies tab and assign the document to the relevant companies.

Click Save.