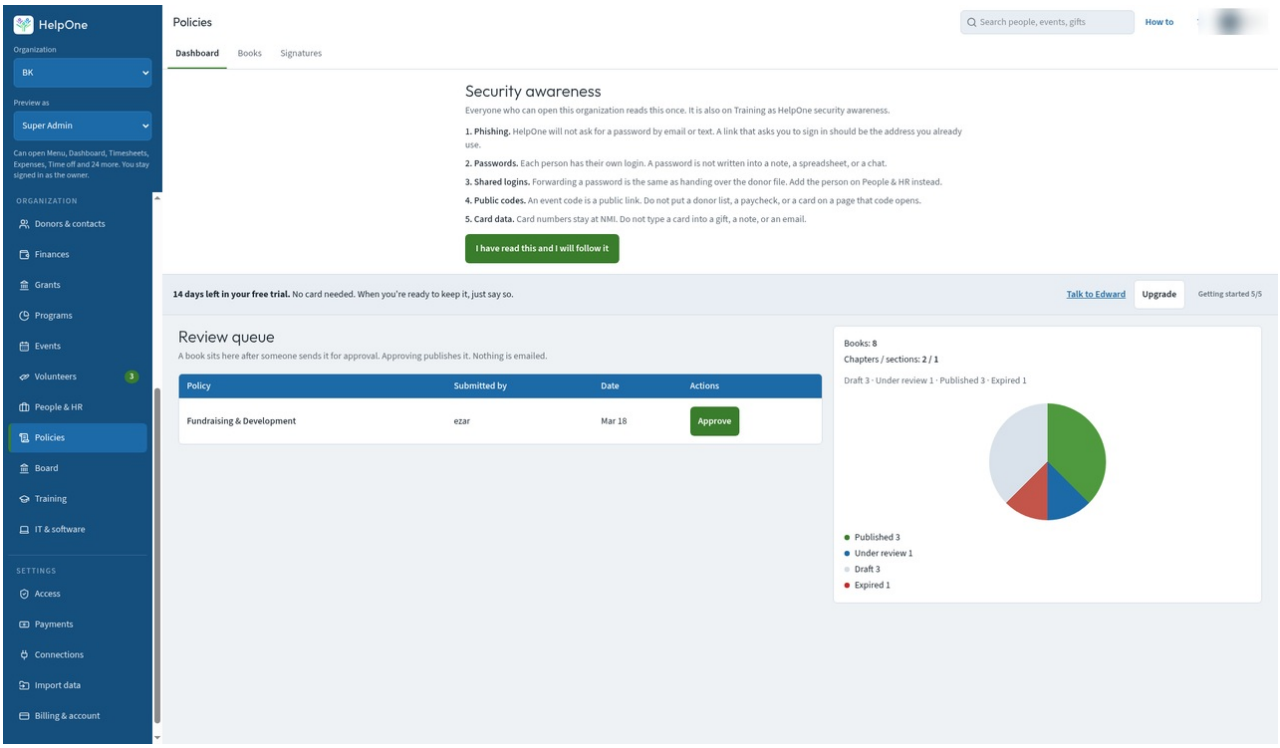
How to send a document for e-signature

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HelpOne sends documents for signature with DocuSeal.

Steps

1. In the sidebar, go to Policies.
2. Open the Signatures tab.
3. Pick the Policy and the Person.
4. Click Ask for a signature and set the Due date.
5. Click Send with DocuSeal.
6. When it's signed on paper or elsewhere, click Mark signed.



The list shows what is Due and what is Signed.

DocuSeal is set up in Settings > Connections.

Tip: Add required signatures to the new hire's checklist so forms, policies, and training are done together.