

How to send a document for e-signature

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Use e-signatures for onboarding packets, offer letters, and policy acknowledgments. Signed copies stay on the person's record.

Steps

- Open the staff, volunteer, or contact record (or start from HR or Policies).
- Choose Send for Signature or E-signature.
- Select the document or policy.
- Confirm the signer and their email.
- Send.

You can see whether the request is pending, viewed, or signed. When it is complete, HelpOne stores the signed PDF on the record.

Tip: Attach required signatures to an onboarding checklist so a new hire finishes forms, policies, and training in one place.