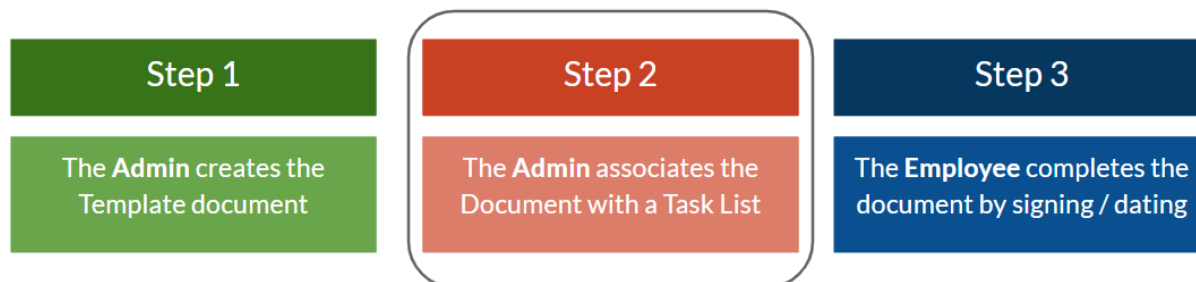# PayNortheast

Associating an E-Signature Document Template with a Task List

In order for employees to be able to E-Sign a document through the new hire onboarding, the Admin (after first creating the document template), must then associate the HelloSign© document with an onboarding Task List.

The E-Signature verification process:

Step 1	Step 2	Step 3
The **Admin** creates the Template document	The **Admin** associates the Document with a Task List	The **Employee** completes the document by signing / dating

This section describes Step 2: Associate the document with a task list. In Advanced HR, a **Task List** is a list of all the tasks an employee needs to complete when they go through new hire onboarding, such as a direct deposit request, signing various types of company documents such as Privacy Policy or Confidential Disclosure Agreement, acknowledgement forms, etc.. The Admin can associate each specific document that they have created a template for with a particular onboarding Task List and the employee can then E-Sign the document during the new hire process.

All documents associated with the Task List will be saved in the Employee Documents Folder. Remember, Task Lists can be general purpose for ALL new hires, or, they can be created specifically for a particular position or purpose. Maybe only certain positions for the company will be required to E-Sign a Confidentiality Agreement document for example; those positions would have their own Task List. Other employees would use a different Task List that does not include the Confidentiality Agreement.

The first step of the process is the Onboarding Task List. The Admin needs to get both the HelloSign Template and the HR documents into one aggregated list so the admin can select both the template and the documents.

To associate a document with a Task List:

1. Go to **HR Admin – Onboarding – Onboarding Task List**.
2. The system displays the **Onboarding Task List** screen, showing all existing onboarding task lists.

3. Select an existing Task List that you want to add the document(s) for the new hire employee to E-Sign.

4. The system displays the Onboarding Task List details screen for the selected Task List.

Note: To create a new Task List, from the **Onboarding Task List** summary screen, click on the **+ New** button. To learn how to create a new Task List, refer to the Onboarding Prep Process section of the *Advanced HR 2.0 Administrator Guide*, in the *Onboarding Task List* section.

5. In the **Steps** section, set the **Include Company Documents** toggle switch to **Yes**.

6. In the **Select/Change Company Documents** dropdown below, select the document(s) that you want to have the employees E-Sign as part of this onboarding Task List.

Note: Company Documents are first uploaded into the system using the **HR Admin – Company – Company Documents** screen. Once they have been uploaded, you can select them here in order to associate them with a Task List.

7. You can select multiple documents from the dropdown and add them all to the Task List, for example above: **Non-Compete Form, Privacy Policy Form**, etc.
8. Once you have selected all the documents that you want to be associated with this Task List, click the **Save** button to save the Task List.

Once the documents have been associated with a Task List, they can now come into use when an employee undergoes the appropriate process, for example, the new hire onboarding process. We next discuss how the employee E-Signs the selected document (Step 3), view the following pdf to learn how:

Employee E-Signs a Document in Advanced HR 2.0