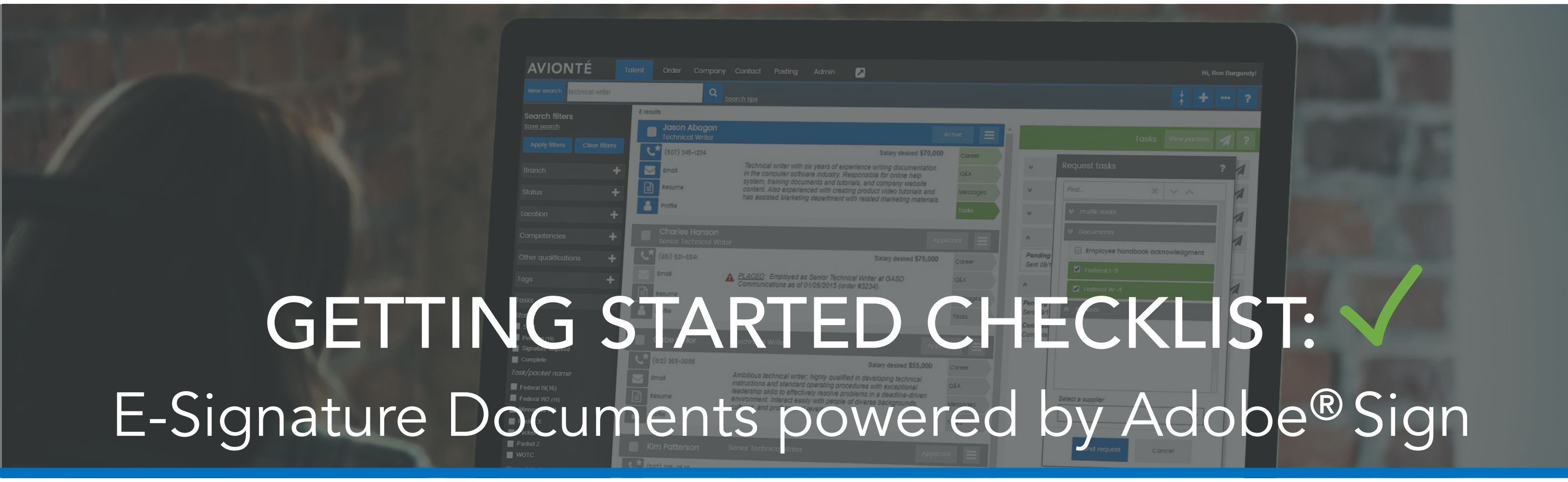
AVIONTÉ

MOBILE ONBOARDING



GETTING STARTED CHECKLIST: ✓

E-Signature Documents powered by Adobe® Sign

This checklist will walk you through the steps to getting started with E-Signature Documents powered by Adobe Sign. If you want to use this new e-signature document solution, then follow this checklist!

☐ 1. Reach out to your Avionté Strategic Account Executive (SAE) or Project Manager

Ready to start using the new E-Signature Documents? Great! Reach out to your SAE to let them know so you can discuss package options. From there, they will get you set up with an Adobe Sign account.

☐ 2. Give your SAE the following information for your Adobe Sign account:

We recommend setting up your account through an Account Owner, you can set up with a group email if preferred.

a. Company Name

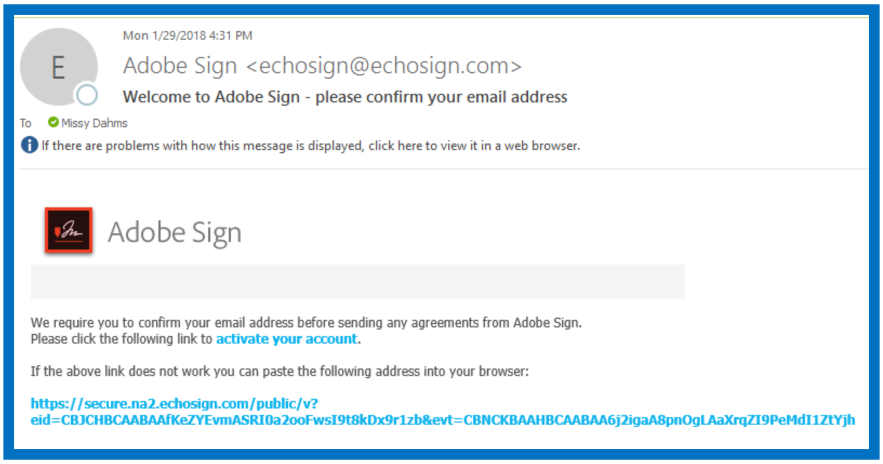
b. First Name

c. Last Name

d. Email Address - This is the email that will receive updates and notifications from Adobe Sign. It can be the designated Account Owner, or a group email if preferred.

☐ 3. Confirm Your Adobe Sign Account & Update Password

You will receive an email from Adobe Sign asking you to confirm your account. Once you confirm your account and sign in for the first time, you can update your password from the original password created with your SAE.



Mon 1/29/2018 4:31 PM

Adobe Sign <echosign@echosign.com>

Welcome to Adobe Sign - please confirm your email address

To Missy Dahms

If there are problems with how this message is displayed, click here to view it in a web browser.

Adobe Sign

We require you to confirm your email address before sending any agreements from Adobe Sign.
Please click the following link to activate your account.

If the above link does not work you can paste the following address into your browser:

https://secure.na2.echosign.com/public/v?eid=CBJCHBCAABAAfKeZYEvmASRI0a2ooFwsI9t8kDx9r1zb&evt=CBNCKBAAHBCAABAA6j2igaA8pnOgLAaXrqZI9PeMdI1ZtYjh

4. Create Templates in Adobe Sign

Once you have confirmed your Adobe Sign account, it's time to start creating your E-Signature Document Templates in the Adobe Sign library!

a. On your dashboard, select "Add a new template". This is where your documents can be loaded and configured for use. Please refer to the configuration resources below:

- VIDEO: Getting Started with E-Signature Documents powered by Adobe Sign
- VIDEO: Configuring a Federal W-4
- RESOURCE: Field Mapping Document (Attached to this SUPPORT ARTICLE)

b. By visiting the Manage area, you can manage and edit your templates in the "Template Library"

5. Activate & Permission E-Signature Documents powered by Adobe Sign

Once you've created templates in Adobe Sign, it's now time to set up and permission Adobe Sign and E-Signature Templates on the Recruiter Module. This includes:

a. **Admin > Email Templates**: This is where you'll set up email templates that talent will receive after a recruiter sends out an E-Signature Document as a Talent Task.

b. **Admin > User Groups**: This is where you'll create user groups for group permissions on E-Signature Documents. Permissions will be assigned on a per document basis. User groups should reflect overall users within your organization i.e. Recruiters, HR, Compliance, etc.

c. **Admin > Talent Module Settings > Onboarding**: This is where you'll turn ON specific E-Signature Documents, which pull in directly from your Adobe Sign Templates. In order to send out an E-Signature Document as a Talent Task, the specific document should be toggled ON.

- For more information, watch this getting started video.

d. **Admin > Talent Module Settings > Packets**: This is where you'll set up various packets of E-Signature Documents i.e. New Hire Packet, Re-hire Packet, etc.

6. Communicate Internally with Your Teams

Once you have created, configured, and set permissions on your E-Signature Documents, you should communicate a usage plan internally with your employees! Ensure everyone internally knows the process they should follow to send out E-Signature Documents to talent.

7. Transition from old eDocuments to new E-Signature Documents with Adobe Sign

Are you currently using the old eDocuments solution as a part of the Core Application? Here are our recommended steps for making the transition - based on what makes sense for your business.

a. Select a date you will start using Adobe Sign and communicate this date internally.

b. You can then choose to allow old, pending eDocuments to be completed using the old Employee Portal, **OR**...

c. You can choose to inactivate the old eDocuments and resend them via the new process on the Recruiter Module.

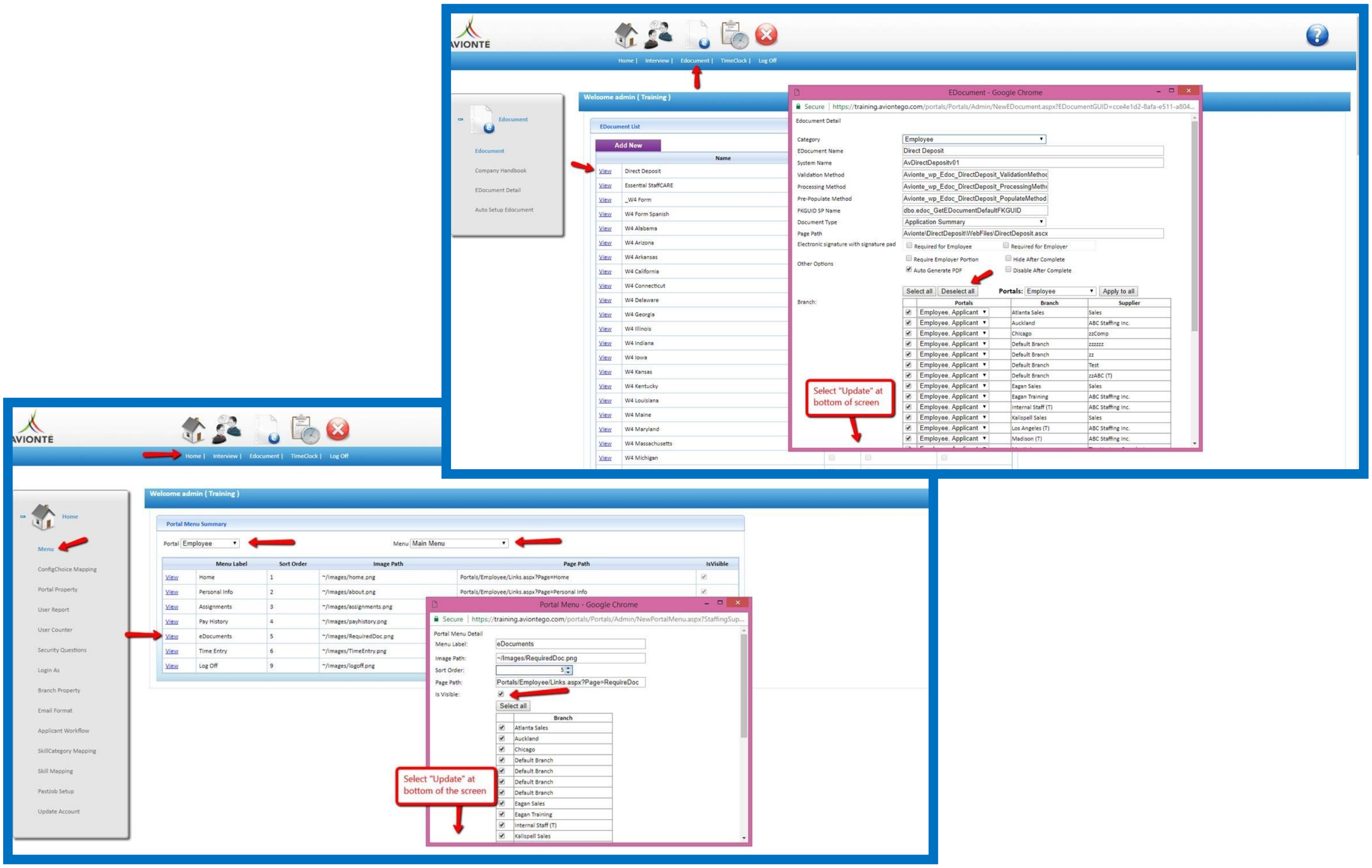
d. If you choose to allow old eDocuments (**option b.**) to be completed, this could be harder to manage because there is no way to ensure your users are not sending out old eDocuments as they will remain active until those pending are completed.

e. If you choose to resend old eDocuments via the new process with Adobe Sign (**option c.**), then we recommend inactivating your old eDocuments and shutting off the eDocument area in the Employee Portal.

8. Deactivate Old eDocuments & Shut Off in Employee Portal

In order to deactive your old eDocuments on the Core Application, follow this process:

Admin Portal > Home > Menu > Portal = Employee > Menu = Main Menu > View eDocuments > Uncheck "IsVisible" > Select Update.



Best Practices for Managing E-Signature Documents:

1. You can delete templates out of your Adobe Sign library. This automatically inactivates templates in Recruiter Module, and if the deleted document was pending as a Talent Task for talent to complete, it will be removed.
2. A template in Adobe Sign can be updated at any time. There is no tracking on the Adobe Sign side regarding changes. This means that any talent with this document pending their completion they will see the updated version.
3. If there is a new version of a document (i.e. I-9 or W-4s), the template can be updated in the Adobe Sign library, but there is no way to manage that version change. It is recommended that a new template be created and then permissioned in Avionté. This will allow you to manage any version changes accordingly.