EVOLVE
Applicant Tracking

EVOLVE
Applicant Tracking System

Native eSignature for Offer Letters
User Manual

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Change Log

Date	Version	Author	Description of Changes
10/12/2022	V1.0	Michael Carrino	Initial Release • Setting to expire request for electronic signature • Standardized email templates ○ Admins can edit templates • Candidate Signature Only • Ability to Void Offer Letter
02/06/2023	V2.0	Michael Carrino / Jess Poitras	Instructions for customers switching from DocuSign to Jobvite eSignature have been added

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Introduction

Evolve's Applicant Tracking System (ATS) Jobvite eSignature helps make Offer Generation easy and intuitive for recruiters and candidates, providing a seamless experience for all. Users will be able to email a link to the candidate that will direct them to their Jobseeker Portal. Once the candidate logs into the portal, they will be able to grant consent for eSignatures and view/sign their Offer Letter.

Features

- Administrators enable Jobvite eSignature for your organization
- Administrator global setting to expire electronic signature requests
- Updated Recruiter experience within the candidate's workflow tab
- Ability to void offer letter signature request, if needed, and add a reason or comment

Benefits

- Candidate's will receive only one letter to them regarding their Offer Letter.
- Reduce the time to request electronic signature
- Automatically receive signed offer letter within candidate profile
- Deliver a seamless and amazing candidate experience

Prerequisites

This section outlines the prerequisites that need to be completed before configuring the Jobvite eSignature feature within your Evolve ATS system.

Jobvite eSignature Requirements:

- Enable Offer Letter Generation
- Offer Letter Templates do not include Company Signer placeholder
- If DocuSign was previously used, must re-upload offer letter templates

Once the above prerequisites are completed, the client can proceed with configuring the Jobvite eSignature feature.

NOTE: The Jobvite eSignature feature is currently designed to only support Candidate Signatures. As new features are added, we will be sure to notify all Evolve customers.

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Configuration Requirements

In order to begin using Jobvite eSignature as part of your Offer Generation process, your Evolve Administrator will need to perform the following configurations:

- Enable the Offer Letter Generation feature
- Update your organization's email templates

  NOTE: Additional information on how to enable and configure your email templates is outlined below.
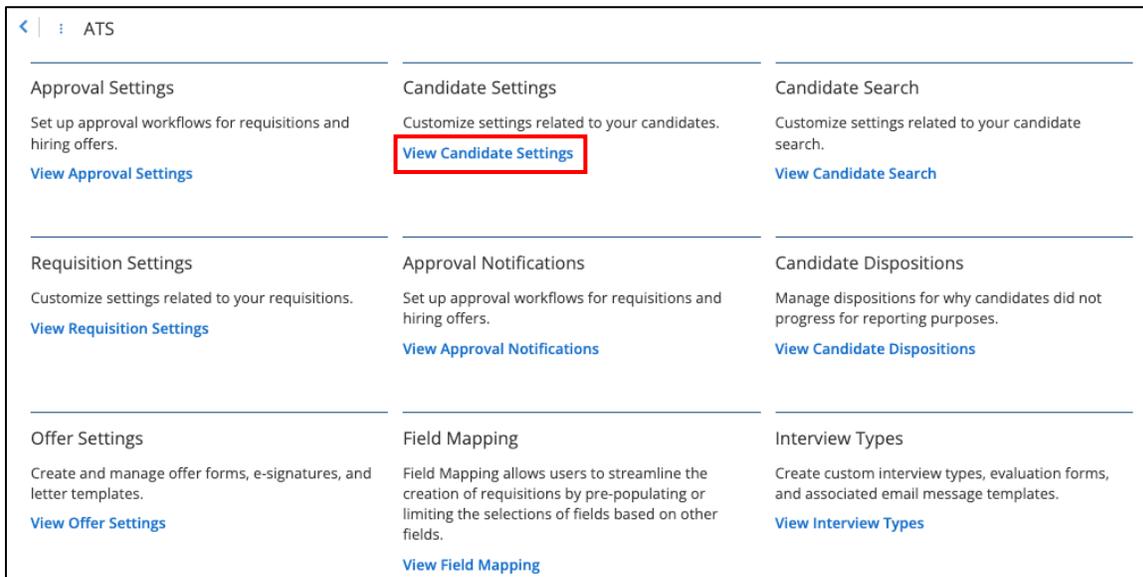
Enable Offer Letter Generation

The Evolve Administrator will need to enable the Offer Letter Generation by performing the following the steps below.

Navigate to your user menu, then select **Admin**.
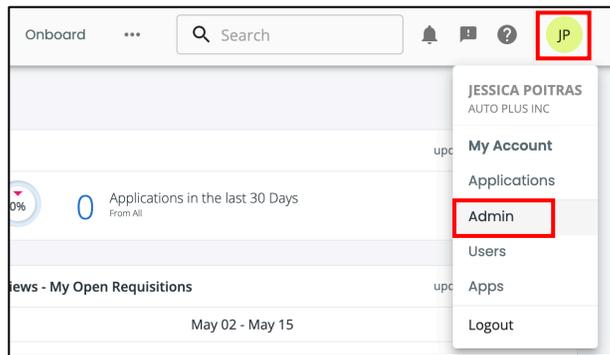
Click **ATS**, then select **View Candidate Settings**.

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Scroll down to the bottom of the screen and click **Edit**.

Scroll up to **Offer Letter Generation** section.

If it is disabled, select **Enable**.

The *Jobvite eSignature* section will display. Select **Enabled**.

Enter a number between **1 – 365** in the *Expire Candidate Offer after number of calendar days* field. This will expire a candidate's offer letter at 11:59 PM in the candidate's time after the selected number of days.

Scroll back to the bottom of the screen and click **Save**.
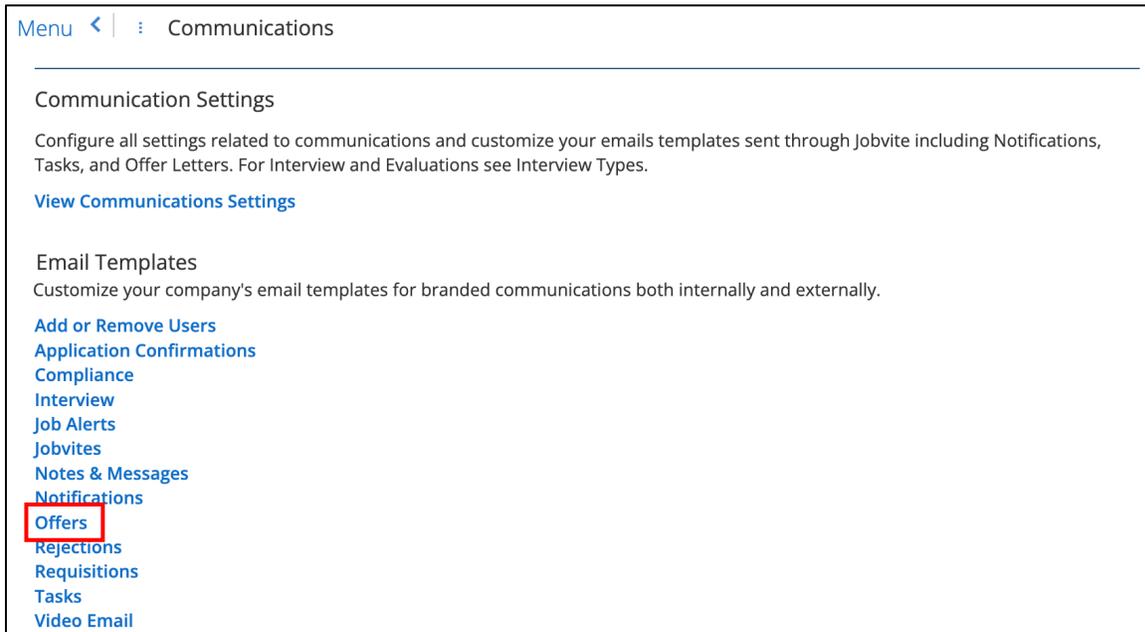
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Configuring Email Template(s)

Follow the configuration steps below to update your Interviewer and Candidate Email Templates.

Navigate to your user menu, then select **Admin**.
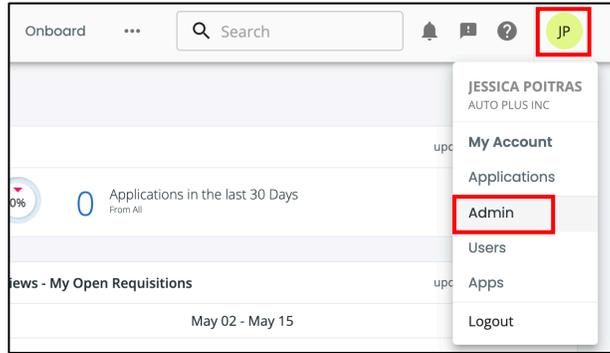
Click **Communications**, then select **Offers**.

Click the **Offer letter – Jobvite eSignature** template.

▶ **Offer letter – Jobvite eSignature (1)** Message to candidate used to transmit offer letter via Jobvite's eSignature	Recruiter or Hiring Manager	Candidate
▶ **Offer letter – Jobvite eSignature Completed (1)** Message to Recruiter or Hiring Manager advising the offer letter was signed.	System	Recruiter or Hiring Manager
▶ **Offer letter – Jobvite eSignature Voided (1)** Message to candidate advising their offer letter was voided.	Recruiter or Hiring Manager	Candidate

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Click **+** next to *Offer letter – Jobvite eSignature*.

Click **Edit** next to the desired translation.

Update the **Subject** and **Message** sections with the desired verbiage and placeholders, as needed.


Click **Save**.

Repeat these steps to the following email templates:

- Offer letter – Jobvite eSignature Completed
- Offer letter – Jobvite eSignature Voided

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Uploading Offer Letter eSignature Templates

Follow the configuration steps below to upload your organizations' Offer Letter eSignature Templates.

Navigate to your user menu, then select **Admin**.

Click **ATS**, then select **View Offer Settings**.

Click **View Offer Letter Templates**.
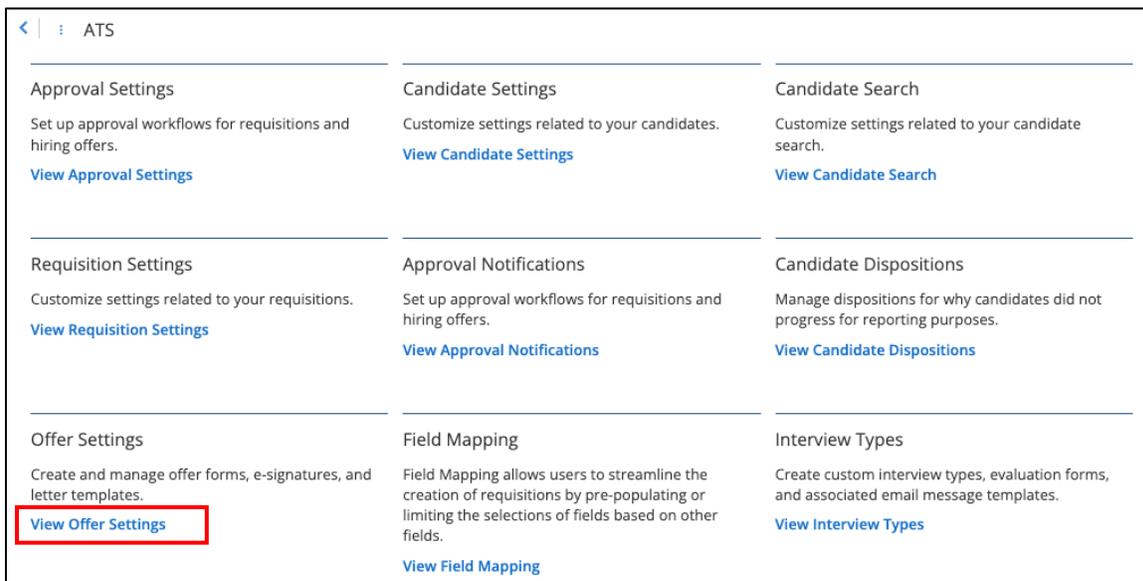
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Uploading Offer Letter eSignature Templates

Follow the configuration steps below to upload your organizations' Offer Letter eSignature Templates.
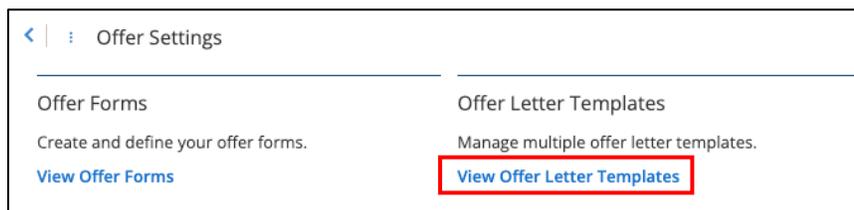
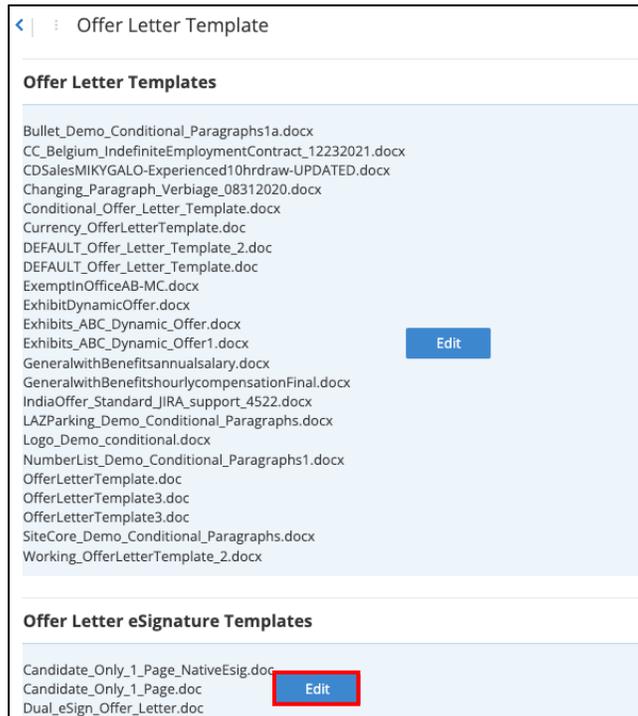Navigate to your user menu, then select **Admin**.
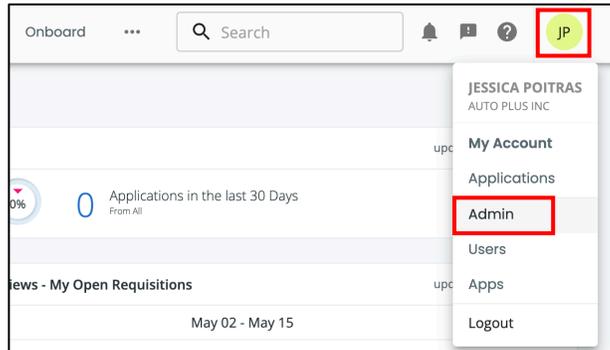
Click **ATS**, then select **View Offer Settings**.
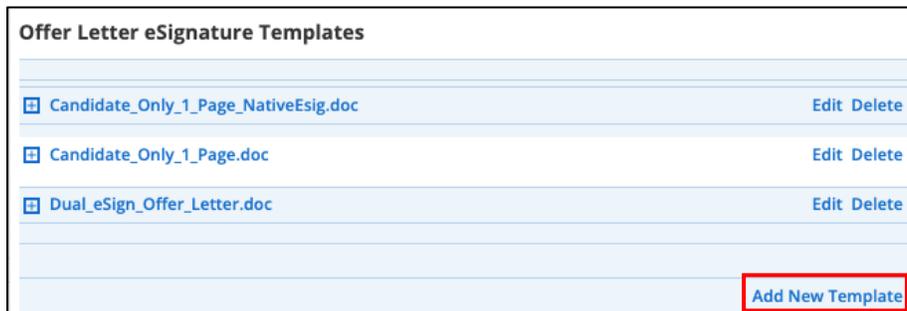

Click **View Offer Letter Templates**.
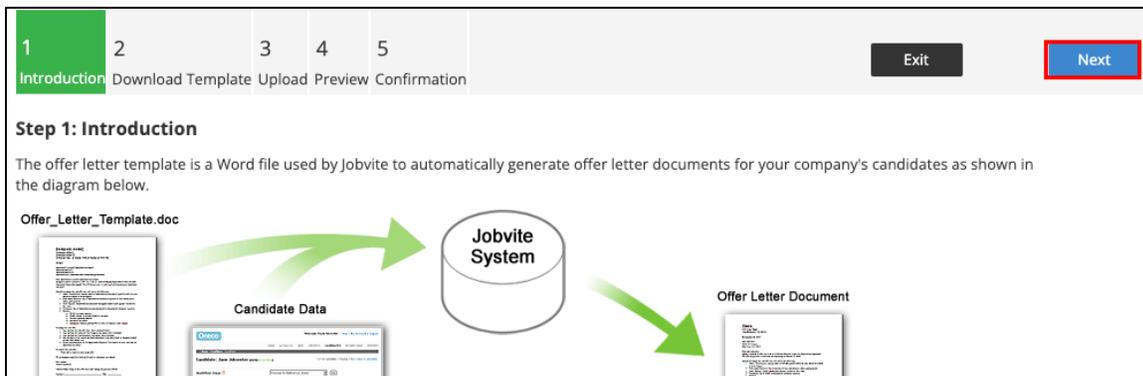
Within the *Offer Letter eSignature Templates* section, click **Edit**.
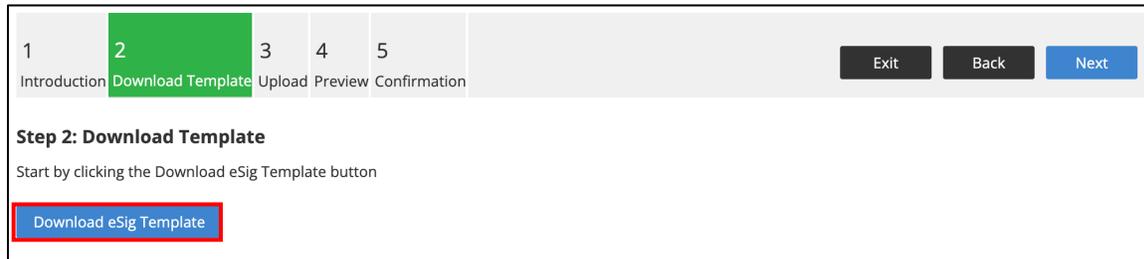

Click **Add New Template**.

Click **Next**.
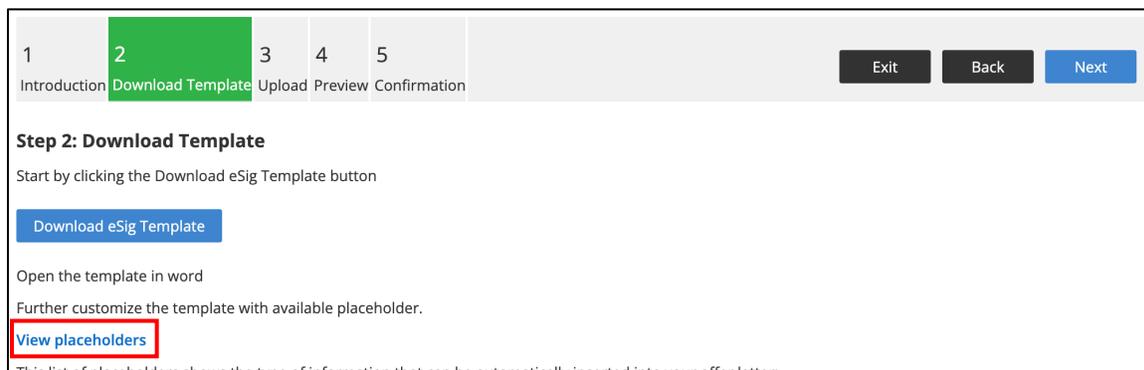
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Within the *Download Template* tab, you can Download eSig Template and view available placeholders.

Click **Download eSig Template**, then open the template.

1	2	3	4	5				
Introduction	Download Template	Upload	Preview	Confirmation		Exit	Back	Next

Step 2: Download Template

Start by clicking the Download eSig Template button

Download eSig Template

Click **View Placeholders**.

1	2	3	4	5				
Introduction	Download Template	Upload	Preview	Confirmation		Exit	Back	Next

Step 2: Download Template

Start by clicking the Download eSig Template button

Download eSig Template

Open the template in word

Further customize the template with available placeholder.

View placeholders

This list of placeholders shows the type of information that can be automatically inserted into your offer letter:

Click **eSignature**, then update your existing Offer Letter Template(s) to include the following eSignature Placeholders:

- [candidate-sign-1] -> Inserts the candidate's electronic signature into the completed offer letter.
- [candidate-sign-date-1] -> Inserts the date the candidate signed the offer letter.
- [candidate-sign-initials-1] -> Inserts the candidate's electronic initials into the completed offer letter.
- [candidate-sign-name-1] -> Inserts the typed form of the candidate's name

NOTE: Placeholders in the lists may be copied and pasted into your Offer Letter template document.

Placeholder List

Placeholders in the lists below may be copied and pasted into your offer letter template document to insert candidate and offer data into offer letters.
Select the placeholder from the list, right click and copy it. Switch to your offer letter document and paste the placeholder into your document.
Any allowed acceptance duration beyond that supported by the placeholders would not be automatically computed. It would have to be manually inserted after downloading the offer letter.
Placeholders
○
Fields
○
Date Expressions
●
eSignature

[candidate-sign-1]
[candidate-sign-date-1]
[candidate-sign-initials-1]
[candidate-sign-name-1]
[company-sign-2]
[company-sign-date-2]
[company-sign-initials-2]
[company-sign-name-2]

Click **Next**.

Step 2: Download Template

Start by clicking the Download eSig Template button

Download eSig Template

Within the *Upload* tab, click **Choose File**.

Step 3: Upload

Now that you have created and saved your offer letter template it's time to upload and preview your document. Please select the file by clicking on the button below.

Choose File   No file chosen

eSignature enabled

Click Next to upload your template document

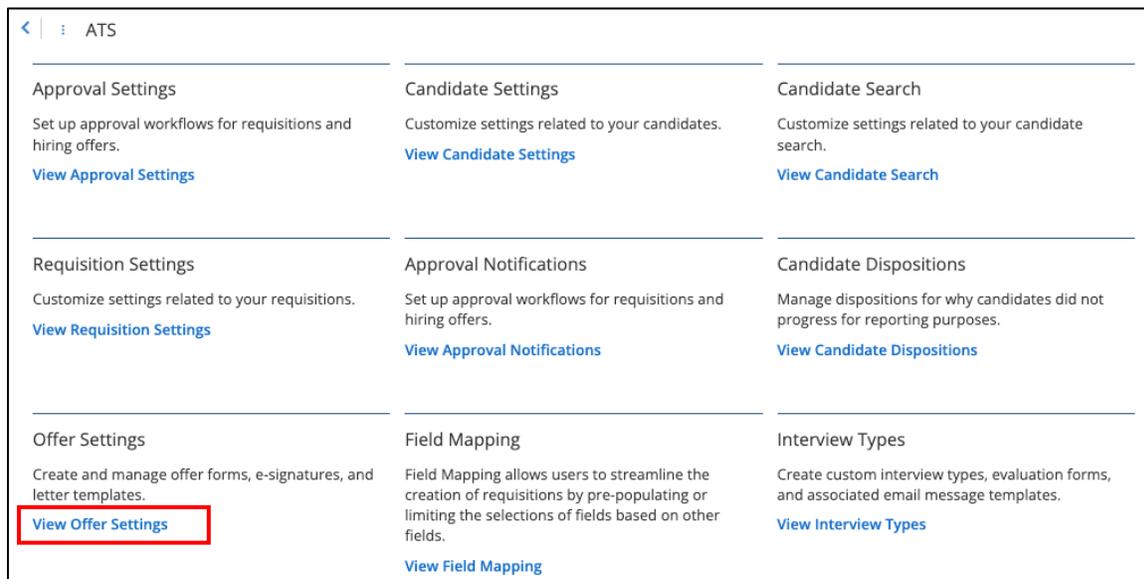Select the template and upload it. Make sure you preview the template before confirming and saving.

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Configurating Multiple Offer Forms

If your organization is using Multiple Offer Forms, then the Evolve Administrator will need to associate Offer Letter Templates to the desired Offer by performing the following actions.
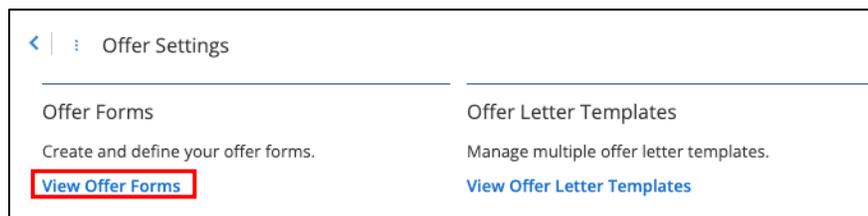
Navigate to your user menu, then select **Admin**.
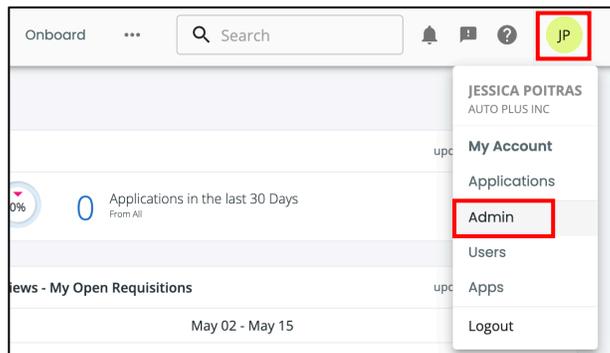
Click **ATS**, then select **View Offer Settings**.

Click **View Offer Forms**

Select the desired Offer Form name.

Click **Offer Letter Templates**

Select the desired templates(s)

Scroll down and click **Apply**.

Click **Save**.

Recruiter Experience

This section outlines the Recruiter's experience when moving a candidate into Offer Generation and sending the Offer Letter to a candidate.

Navigate to your desired candidate.

Select the desired candidate.

Use either option to advance the candidate into the Offer Generation workflow step.

- Workflow Step dropdown, select **Offer Generation**
- Action States button, select **Proceed to Offer Generation**

Select the desired Offer Letter Template.

Click **Generate**.

Select the following as needed:

- Export – download the offer letter and make updates to offer letter
- Preview – to preview the letter prior to sending to the candidate
- Done – done with the generation process

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Click **Send Offer To Candidate**.

Update the Send Offer Letter To Candidate screen as needed:

- Add user(s) to CC line
- Update Subject and/or Message
- Upload Attachments

Click **Send**.

You will be returned to the candidates' *Workflow* tab. The Offer Generation workflow step shows when the Offer Letter was sent to the candidate and the Offer Letter expiration Date.

Expand the Offer Generation options by clicking the **+** icon**.**

You will have access to the following actions:

- **Resend To Candidate** – Resends the signature request email to the candidate. Also, if the Offer Letter Expiration has passed, clicking **Resend To Candidate** will extent the timeframe for the candidate to sign their offer letter.

- **Void Offer Letter** – Allows the user to void the candidate's offer letter. The user will be required to enter a reason.

- **View Offer Letter** – Allows the user to view the Offer Letter that was sent to the candidate.

Upon the candidate completing their electronic signature, the requestor will receive the *Offer letter – Jobvite eSignature Completed* notification.
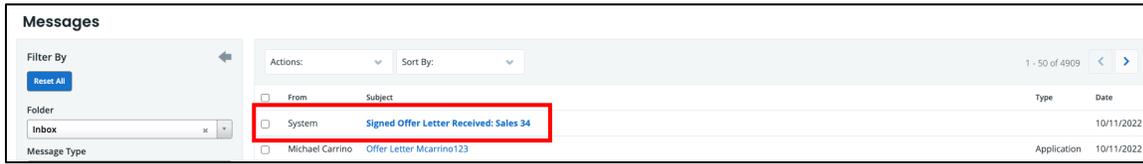
User will also see the status update within the candidate's Offer Generation workflow step.
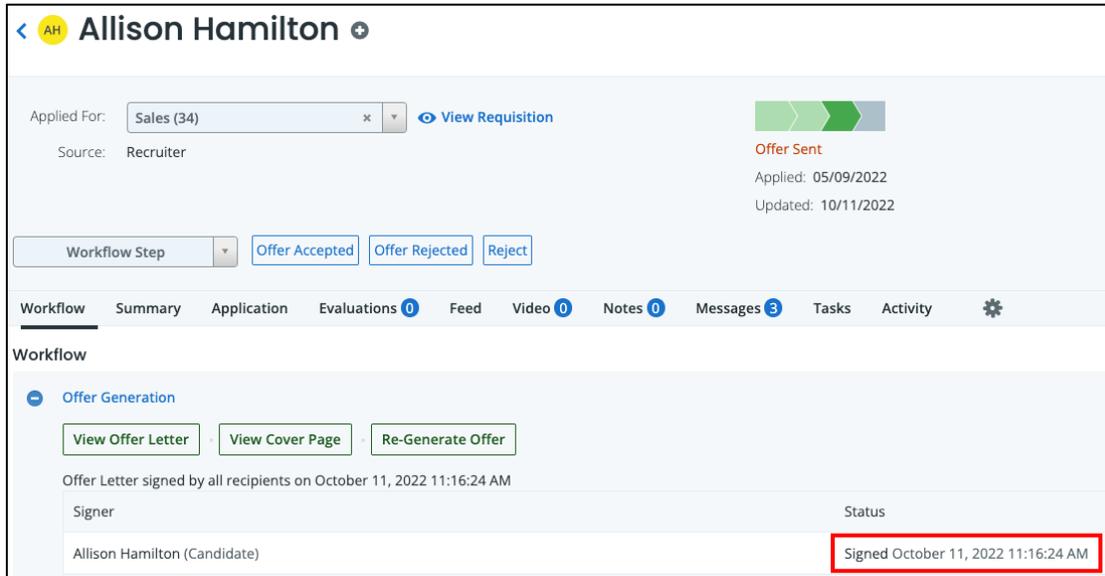
Within the candidate's Offer Generation workflow state, you will have access to the following actions:

- **View Offer Letter** – View electronically signed offer letter
- **View Cover Page** – View Jobvite's certification of completion for the electronic signature
- **Re-Generate Offer** – Create a new Offer Letter

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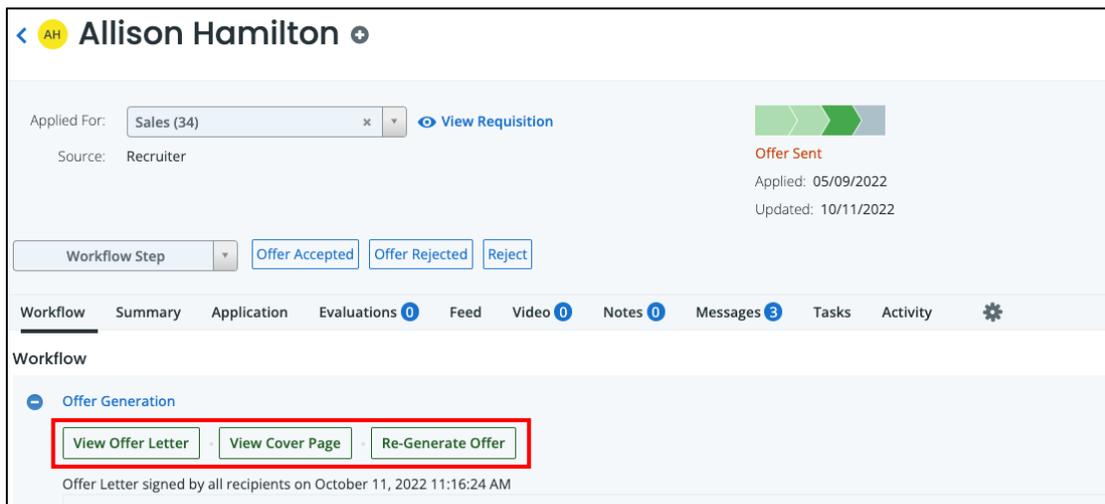
Switch from DocuSign to Jobvite eSignature

If your organization has previously used the Evolve ATS integration with DocuSign, you will need to follow the instructions below to switch from DocuSign to Jobvite eSignature:

Disconnect the DocuSign Integration by navigating to your **user menu**, then select **Admin**.

Click **Integrations**, then **View DocuSign**.
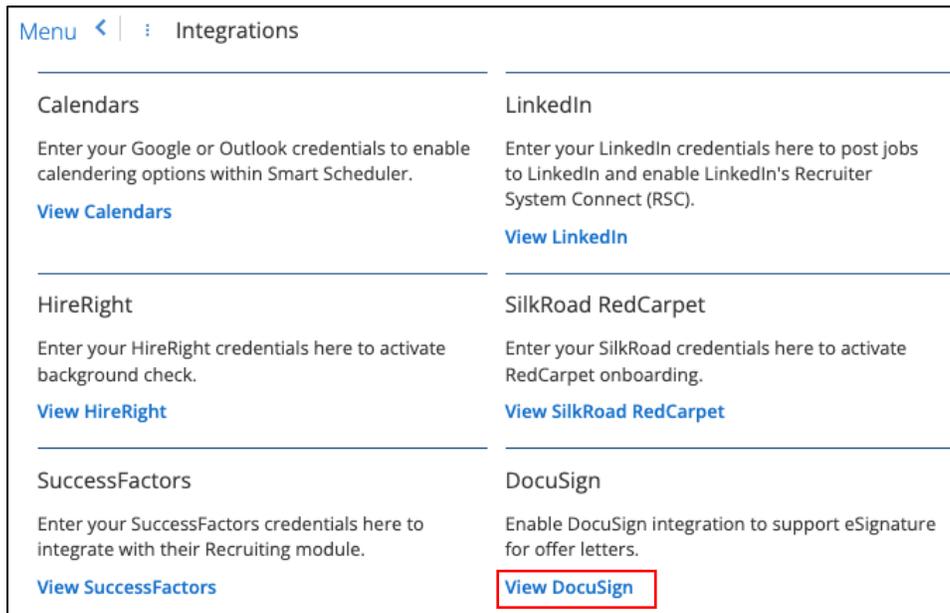
Click **Disconnect**.

Next, enable the Native eSignature feature by navigating to your **user menu** → **Admin** → **ATS** → **View Candidate Settings**.

Scroll to the bottom of the screen and click **Edit**.

Enable **Jobvite eSignature**.

NOTE: Offer Letter Generation must be Enabled in order to see the Jobvite eSignature section.

Enter the **Expire Candidate Offer after number of calendar days**.

NOTE: You must enter a number between 1-365.

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Scroll to the bottom of the screen and click **Save**.

Now you are ready to download the existing Offer Letter Templates. Navigate to the **user menu** →
Admin → **ATS** → **View Offer Settings** → **View Offer Letter Templates**.

Click **Edit**.

Menu ‹ | ⋮   Offer Letter Template

Offer Letter Templates

Changing_Paragraph_Verbiage_DON.docx
FullTimeOfferLetter1.doc   **Edit**
PartTimeOfferLetter.doc
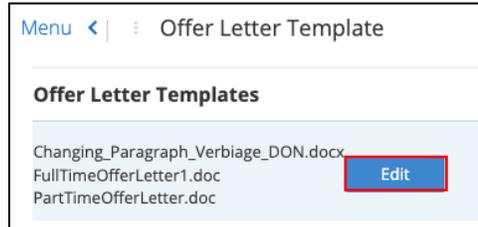
Select the name of the offer letter template.

The file will download to your computer. Save the file(s) locally with a different naming convention
(i.e. FullTimeOfferLetterJV1).

Review the template(s) to ensure it DOES NOT include any of the Company Signer Placeholders.

NOTE: Company Signer functionality is not support with Native eSignature.

Click **Add New Template** to upload the newly named template(s).

Menu ‹ | ⋮   Offer Letter Template

Offer Letter Templates

⊞ Changing_Paragraph_Verbiage_DON.docx	Edit Delete
⊞ FullTimeOfferLetter1.doc	Edit Delete
⊞ PartTimeOfferLetter.doc	Edit Delete

Add New Template

Click **Next** in the *Introduction* and *Download Template* tabs.

Click **Choose File** in the *Upload* tab.

1	2	3	4	5		Exit	Back	Next
Introduction	Download Template	Upload	Preview	Confirmation				

Step 3: Upload

Now that you have created and saved your offer letter template it's time to upload and preview your document. Please select the file by clicking on the button below.

Choose File   No file chosen

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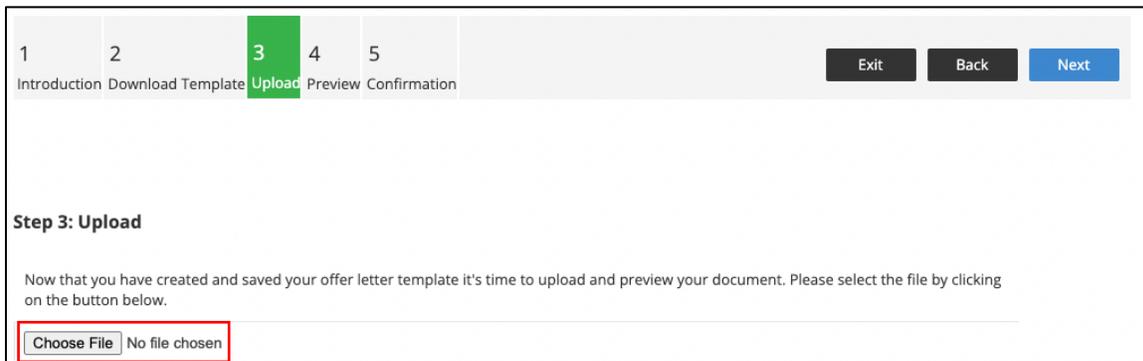
Select the template from your files, then click **Next**.

Preview the template and then confirm to complete the upload.

You are ready to update the Offer Forms. Navigate to your **user menu** → **Admin** → **ATS** → **View Offer Settings** → **View Offer Forms** → select the desired Offer Form.

Click **Offer Letter Templates**.

Select the newly named Offer Letter Template.

NOTE: It is recommended to deselect the old Offer Letter Templates.

Click **Apply**, then click **Save**.

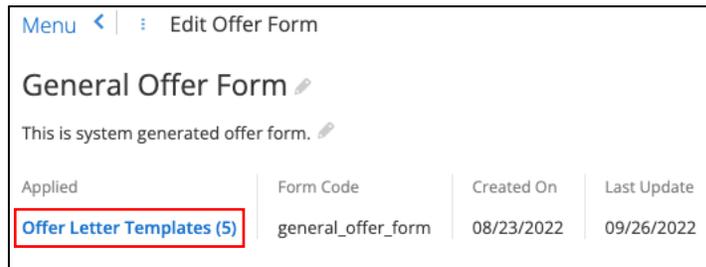Last, deleting the old DocuSign Offer Letter Templates is a best practice to keep the templates decluttered. This is an optional step. Navigate to your **user menu** → **Admin** → **ATS** → **View Offer Settings** → **View Offer Letter Templates** → **Edit** → click **Delete** next to the old Offer Letter Template.

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Additional Help

If you need additional assistance with this feature, please reach out to Evolve ATS Support via one of the options listed in the Help Menu (question mark icon).

We would appreciate your feedback! To let us know what you think of this feature, please reach out to your CSM or write us a note at beta@jobvite.com with the subject: Jobvite Native eSignature for Offer Letters.

FAQs

Q. Why isn't the Jobvite eSignature section available within *Admin > ATS > View Candidate Settings*?

A. In order to see the Jobvite eSignature option, you must enable Offer Letter Generation.

Q. When enabling Jobvite eSignature, what is the "Expire Candidate Offer after number of calendar days" setting?

A. This setting controls when the candidate's request for electronic signature will expire. The expiration date will be calculated by the Date/Time when the Offer Letter is sent to the candidate plus the number of days enter by the Jobvite Admin.

Q. What is valid number for the "Expire Candidate Offer after number of calendar days" setting?

A. Your Jobvite Admin must enter a number between 1 – 365.

Q. As it relates to the "Expire Candidate Offer after number of calendar days" setting, can we change the number of calendar days to business days?

A. No.

Q. How will a recruiter know when a candidate's request for electronic signature is scheduled or has expired.

A. Within the candidate's Offer Generation workflow step, the user will see the *Offer Letter expiration Date* label. To the right of the label is the date in which the Offer will expire.

Q. What is the candidate's experience when their offer letter has expired?

A. When the candidate logs into the Jobseeker portal, the Offer Letter within the *Application Details* screen displays **Signature Request Expired** text.

Q. When a candidate's Offer Letter has expired, can a user grant an extension?

A. Yes. The user will need to navigate to the candidate's Offer Generation workflow step. Click, **Resend to Candidate**. This will extend the time to electronically sign by the number of days set within the *Expire Candidate Offer after number of calendar days* setting. Evolve does not prompt or store the users' video conference login credentials.

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