



Native eSignature for Offer Letters User Manual



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.



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.

Approval Settings	Candidate Settings	Candidate Search
Set up approval workflows for requisitions and hiring offers.	Customize settings related to your candidates.	Customize settings related to your candidate search.
View Approval Settings	view candidate settings	View Candidate Search
Requisition Settings	Approval Notifications	Candidate Dispositions
Customize settings related to your requisitions.	Set up approval workflows for requisitions and hiring offers.	Manage dispositions for why candidates did not progress for reporting purposes.
	View Approval Notifications	View Candidate Dispositions
Offer Settings		Interview Types
Create and manage offer forms, e-signatures, and letter templates.	Field Mapping allows users to streamline the creation of requisitions by pre-populating or	Create custom interview types, evaluation forms, and associated email message templates.
View Offer Settings	limiting the selections of fields based on other fields.	View Interview Types
	View Field Mapping	



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

Show optional evaluation questions on mobile app	
Show optional evaluation questions.	
Enabled	
Agency candidate submission policy	
This setting controls the policy and time frame for accepting candidates submitted by agencies. The policy options below are only relevant to the agency based submission of a candidate. The options selected below do n candidates internally to requisitions or how the candidates apply for jobs.	ot affect how recruiters submit the
Always allow agencies to submit a candidate to a requisition (as long as the candidate with the same email address does no	t already exist on that requisition)
Candidate Move operation: Enable candidate move operation across requisitions with different workflows	
If enabled, recruiters have the option to reject a candidate from the originating requisition, and copy them to the destinatio operation. Reject and copy is also the recommended way to move candidates.	n requisition - in one single
Enabled	
Require recruiters to provide a disposition when an offer is rejected by candidate	
When this setting is enabled, the recruiters will have to provide a disposition when moving a candidate to offer rejected stat complete the action without choosing a disposition. Please ensure that you have defined at least one disposition value prior no disposition values to choose from and this setting is enabled, the recruiters will not be able to move the candidates to of	us. The recruiters will not be able to r to enabling this setting. If there are ffer rejected status.
Enabled	
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.



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.

Menu < E Communications
Communication Settings
Configure all settings related to communications and customize your emails templates sent through Jobvite including Notifications, Tasks, and Offer Letters. For Interview and Evaluations see Interview Types.
View Communications Settings
Email Templates
Customize your company's email templates for branded communications both internally and externally.
Add or Remove Users
Application Confirmations
Compliance
Interview
Job Alerts
Jobvites
Notes & messages
Offers
Rejections
Requisitions
Tasks
Video Email

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 Candidate Manager	
	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



Click + next to Offer letter – Jobvite eSignature.

 Offer letter – Jobvite eSignature (1) Message to candidate used to transmit offer letter via Jobvite's eSignature 		Recru Mana	iter or Hirin ger	g Can	Candidate	
	Offer letter – Jobvite eSignature	🖋 Edit	🗅 Сору	Default 🕑	🛱 Delete	
	Add New Template					

Click Edit next to the desired translation.

•	Offer letter – Jobvite eSignature (1) Message to candidate used to transmit offer lett Offer letter – Jobvite eSignature	Recruiter or Hiring Manager	Candidate	
	Chinese (China) - 中文	工作邀请函 – Jobvite电子签名	Edit	
	Chinese (Hong Kong SAR China) - 中文	工作邀請函– Jobvite 電子簽章	Edit	
	English (United Kingdom) - English	Job Offer letter – Jobvite eSignature	Edit	
	English (United States) - English	Offer letter – Jobvite eSignature	Edit	
	French (Canada) - français	Lettre d'offre – Signature électronique Jobvite	Edit	

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

Add Template Fields	0	Template Editor	Language Type: English (United States) 🍵 Delete Translation
wailable Template Fields Drag the field to the message body	•	Template Name*	Offer letter – Jobvite eSignature
[candidate-first-name]		Subject	Offer Letter [job-company-name]
[candidate-last-name]		Message	Para fan didata fanta ana 3
[company-name]		Wessage	Dear (canologie inst-name),
[job-company-name]			yop-company-namej is pieased to orrer you a jop as a yop-titlej. Please click [link] to review and sign your offer letter by [signing-expire-date]
'job-title]			Best regards,
[link]			[sender-signature]
[requisition-id]			
[sender-email]			
[sender-first-name]			
[sender-last-name]			
[sender-phone]		Preview Cano	Save
[sender-signature]			

Click Save.

Repeat these steps to the following email templates:

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



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.

Approval Settings	Candidate Settings	Candidate Search
Set up approval workflows for requisitions and hiring offers.	Customize settings related to your candidates.	Customize settings related to your candidate search.
View Approval Settings		View Candidate Search
Requisition Settings	Approval Notifications	Candidate Dispositions
Customize settings related to your requisitions.	Set up approval workflows for requisitions and hiring offers.	Manage dispositions for why candidates did not progress for reporting purposes.
	View Approval Notifications	View Candidate Dispositions
Offer Settings	Field Mapping	Interview Types
Create and manage offer forms, e-signatures, and letter templates.	Field Mapping allows users to streamline the creation of requisitions by pre-populating or	Create custom interview types, evaluation forms and associated email message templates.
View Offer Settings	limiting the selections of fields based on other fields.	View Interview Types
	View Field Mapping	

Click View Offer Letter Templates.

 Offer Settings 	
Offer Forms	Offer Letter Templates
Create and define your offer forms.	Manage multiple offer letter templates.
View Offer Forms	View Offer Letter Templates



Within the Offer Letter eSignature Templates section, click Edit.

Contraction of the second seco
Offer Letter Templates
Bullet_Demo_Conditional_Paragraphs1a.docx CC_Belgium_IndefiniteEmploymentContract_12232021.docx CDSalesMIKYGALO-Experienced10hrdraw-UPDATED.docx CDGalesMIKYGALO-Experienced10hrdraw-UPDATED.docx Conditional_Offer_Letter_Template.doc DEFAULT_Offer_Letter_Template_2.doc DEFAULT_Offer_Letter_Template.doc ExemptinOfficeAB-MC.docx Exhibits_ABC_Dynamic_Offer.docx Exhibits_ABC_Dynamic_Offer.docx Exhibits_ABC_Dynamic_Offer.docx Exhibits_ABC_Dynamic_Offer.docx Exhibits_ABC_Dynamic_Offer.docx IndiaOffer_Standard_JIRA_support_4522.docx LAZParking_Demo_Conditional_Paragraphs.docx Logo_Demo_Conditional_Paragraphs1.docx OfferLetterTemplate3.doc OfferLetterTemplate3.doc SiteCore_Demo_Conditional_Paragraphs.docx Working_OfferLetterTemplate3.docx Working_OfferLetterTemplate3.docx Working_OfferLetterTemplate3.docx
Candidate_Only_1_Page_NativeEsig.doc
Candidate_Only_1_Page.doc Edit Dual_eSign_Offer_Letter.doc

Click Add New Template.

Offer Letter eSignature Templates	
Candidate_Only_1_Page_NativeEsig.doc	Edit Delete
E Candidate_Only_1_Page.doc	Edit Delete
Dual_eSign_Offer_Letter.doc	Edit Delete
	Add New Template

Click Next.





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

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



Click View Placeholders.

1 2	3	4	5			Evit	Back	Novt
Introduction Download Temp	late Upload	Preview	Confirmation			LAIL	Back	Next
Step 2: Download Temp	olate							
Start by clicking the Download	eSig Templ	ate butto	n					
Download eSig Template								
Open the template in word								
Further customize the templat	e with avail	able place	eholder.					
View placeholders	4		·	 La fore contradition	 			

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 Segmature
[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.

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	

Within the Upload tab, click Choose File.

1 Introductio	2 3 on Download Template Uplo	4 5 Dad Preview Confirmatio	1	Exit	Back	Next
Chan 2: 11	inter d					
Now that on the bu	you have created and saved tton below.	l your offer letter templa	e it's time to upload and preview y	our document. Please select the	file by clicking	
Choose	File No file chosen					
Click Next	t to upload your template do	ocument				

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



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.

Onboard	***	Q Search		P 🕜 🕨
				JESSICA POITRAS AUTO PLUS INC
			upc	My Account
	Applicatio	upp in the last 20 Days		Applications
0% 0	From All	ins in the last 50 Days		Admin
				Users
iews - My Ope	n Requisit	ions	upc	Apps
		May 02 - May 15		Logout

Click ATS, then select View Offer Settings.

Approval Settings	Candidate Settings	Candidate Search		
Set up approval workflows for requisitions and hiring offers.	Customize settings related to your candidates.	Customize settings related to your candidate search.		
View Approval Settings		View Candidate Search		
Requisition Settings	Approval Notifications	Candidate Dispositions		
Customize settings related to your requisitions.	Set up approval workflows for requisitions and hiring offers.	Manage dispositions for why candidates did not progress for reporting purposes.		
	View Approval Notifications	View Candidate Dispositions		
Offer Settings	Field Mapping	Interview Types		
Create and manage offer forms, e-signatures, and etter templates.	Field Mapping allows users to streamline the creation of requisitions by pre-populating or	Create custom interview types, evaluation form and associated email message templates.		
/iew Offer Settings	limiting the selections of fields based on other fields.	View Interview Types		
	View Field Mapping			

Click View Offer Forms

 Offer Settings 	
Offer Forms	Offer Letter Templates
Create and define your offer forms.	Manage multiple offer letter templates.
View Offer Forms	View Offer Letter Templates



Select the desired Offer Form name.

< i Offer Forms									
Create and manage offer forms for requisitions, Adding new custom fields, go to your custom fields or click here + New Offer Form									
Filter By	-411					1-3 of 3			
Reset All	Name	Info	Status	Created On	Last Updated 👻				
Name	Search Name 🗶 🔍	Full-time	ø	Active	02/07/2022 Created by Michael Carrino	10/10/2022 Updated by Michael Carrino			
Status		Part-Time This is for all Part-Time Positions	ø	Active	10/18/2021 Created by Michael Carrino	10/10/2022 Updated by Michael Carrino			
Active × v	General (Default) Demo of Offers2.0 and conditional	ø	Active	10/18/2021 Created by Michael Carrino	09/28/2022				
						1-3 of 3			

Click Offer Letter Templates

 Edit Offer Form 			
Full-time 🖉 Click to add a description 🖉			
Applied Offer Letter Templates (1)	Form Code Created On draft_demo 02/07/2022	Last Update 10/10/2022	
Offer Form Con	ditions		
Offer Form Drag and drop fields and eler	ients for the offer form.		
Search	For	m	Set as default

Select the desired templates(s)

nboard Onboar	Applied Offer Letter Templates	٩	
< Edit Offe	Select which offer letter templates to be used with the form. Manage of		
Full-time Click to add a descri	Q. Search for Offer Letter Template	1 - 23 of 23	
Angeliad	Name	Apply	
Applied	Bullet_Demo_Conditional_Paragraphs1a.docx	Preview 🗌	
	Bullet_Demo_Paragraph.docx	Preview	
Offer Form	Bullet_OfferLetterTemplate.doc	Preview	
	Candidate_Only_1_Page.doc	Preview	
Offer Form	CDSalesMIKYGALO-Experienced10hrdraw-UPDATED.docx	Preview 🗌	
Drag and drop fields	Changing_Paragraph_Verbiage_08312020.docx	Preview	



Scroll down and click Apply.

C : Edit Offe	Conditional_Offer_Letter_Template.docx	Preview		
Luit One	Currency_OfferLetterTemplate.doc	Preview		
Full-time 🖉	DEFAULT_Offer_Letter_Template_2.doc	Preview		
Click to add a descri	DEFAULT_Offer_Letter_Template.doc	Preview		
Applied	Demo_Conditional_Paragraphs.docx	Preview		
Offer Letter Templa	Dual_eSign_Offer_Letter.doc	Preview		
	ExhibitDynamicOffer.docx	Preview		
Offer Form	Exhibits_ABC_Dynamic_Offer.docx	Preview		
Offer Form	Exhibits_ABC_Dynamic_Offer1.docx	Preview		
Drag and drop fields	GeneralwithBenefitsannualsalary.docx	Preview		
Search	General with Benefitshourly compensation Final. docx	Preview		
Search Available Fie	Logo_Demo_conditional.docx	Preview		default 🗹 Active
	NumberList_Demo_Conditional_Paragraphs1.docx	Preview		
Form Element	OfferLetterTemplate.doc	Preview		
🕂 Divider	OfferLetterTemplate3.doc	Preview		
+ Heading	OfferLetterTemplate3.doc	Preview		-
+ Text	Working_OfferLetterTemplate_2.docx	Preview		_
		1 - 23 of 23 🔍		
Available Cand				a
Available Requ		Cancel	Apply	n T ri

Click Save.

Offer Form Conditions		
Offer Form		
Drag and drop fields and elements for the off Search	er form.	
Search Available Fields	Form	🗆 Set as default 🔰 🌄 Active
Form Elements	Candidate	
💠 Divider	Stock	
t‡+ Heading	First Name	
- Text		
Available Candidate Fields	Last Name	
Available Requisition Fields	You can reorder exis	Drag additional fields or elements. ting fields by dragging and dropping them within the form.
Don't see a field? Create a new custom field.		
		Cancel 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.

1 Name 🔹	Search by	/ Name Only				Search		
Showing 43 Applications 🚱 & Saved Searches 🕂 Add Candidate								
🗴 Application Status: New, Approved 🗠 Hide Active Filters • 🛅 Save Search								
Actions 🗸					=	1 - 43 of 43		
Name	Info	Job Applied	Status	Last Activity -	Data Consent Status	Source		
Allison Caitlin	0	Implementation Manager (37)	Approved	10/10/2022	Requested	Recruiter: Michael Carrino		
Derek Smith	ø	TEST Active Candidates (24)	New	09/29/2022	Not Requested	Recruiter: Michael Carrino		
Jessica Rogers	o	Implementation Manager (47)	New	09/26/2022	Consented	Job Board: LinkedIn		

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.

< 📀 Allison Caitlin 🛛			
Applied For: Implementation Manager (37) × * •<	Appro Applie Updat	ved d: 07/22/2021 ed: 10/10/2022	
Workflow Summary Application Evaluations 0 Feed Video 0 Notes 0	Messages 🜀	Tasks Activity	· 🌣
Offer Letter Generation			
Select Offer Letter Template			
Offer Letter Template		*	Generate
		٩	
Candidate_Only_1_Page.doc			
Copyright 2022 Jobvite, Inc. All rights reserved Privacy Policy Terms of Use Support			



Click Generate.

Applied For: Impler	nentation Manager	(37) × 🔻 💿	View Req	uisition					
Source: Recruite	r					Appro	ved		
						Applie	d: 07/22/20	021	
						Update	ed: 10/10/2	2022	
Workflow Step	• Proceed	l to Offer Generatio	Reject	Proceed T	o Onboarding				
orkflow Summary	Application	Evaluations 0	Feed	Video ዐ	Notes 0	Messages 6	Tasks	Activity	*
ffer Letter Gene	eration								
elect Offer Letter Temp	late								
Candidate_Only_1_Pag	ge.doc							× *	Genera
									r
Company Signer	Add Empl	oyee							

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

< 📀 Allison Caitlin 🛛								
Applied For: Implementation Manager (37) × Source: Recruiter Offer Generation Applied: 07/22/2021								
Workflow Step Regenerate Offer letter Send Offer letter Reject	Updated: 10/10/202	2						
Workflow Summary Application Evaluations 0 Feed Video 0 Notes 0	Messages 👌 🛛 Tasks 🛛 A	Activity 🗱						
Offer Letter Generation								
Select Offer Letter Template								
Candidate_Only_1_Page.doc		x 🔻 Generate						
Company Signer Add Employee		v						
To enable, designate a Company Signer field in the offer letter template Cancel Export Preview Done								
Copyright 2022 Jobvite, Inc. All rights reserved Privacy Policy Terms of Use Support								



Click Send Offer To Candidate.

< ֎ Allison Hamilton 🛛	
Applied For: Sales (34) × Source: Recruiter	Offer Generation Applied: 05/09/2022 Updated: 10/10/2022
Workflow Step Regenerate Offer letter Send Offer letter Reject	
Workflow Summary Application Evaluations 0 Feed Video 0 Notes 0	Messages 3 Tasks Activity 🗱
Workflow	
 Offer Generation Send Offer To Candidate Void Offer Letter View Offer Letter Offer Letter generated with Jobvite eSignature 	

Update the Send Offer Letter To Candidate screen as needed:

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

< 😁 Allison Hamilton 🛛	1 of 112	< >
Applied For: Sales (34) * Source: Recruiter	View Requisition Offer Generation Applied: 05/09/2022 Updated: 10/10/2022	
Workflow Step * Regenerate Offer I	etter Send Offer letter Reject	
Workflow Summary Application Evaluation	nns 🕐 Feed Video 🕢 Notes 🜒 Messages 🚯 Tasks Activity 🌞	
Send Offer Letter To Candidate		
То	Alison Hamilton	
сс	x Michael Carrino	
	Notify CC list when offer letter is accepted or rejected.	
Subject	Offer Letter Mcarrino 123	٤
Message	Formats - B I E - E - &	
	Dear Allison,	
	Mcarrino123 is pleased to offer you a job as a Sales.	
	Please click [link] to review and sign your offer letter by October 14, 2022 7:52:24 AM PDT.	
	Best regards,	
	Michael Carrino Sr. Product Managet	
Attachments	Upload File Or drop files here from your desktop to upload. Files shall not exceed 10MB The file should be a PDF, Microsoft Word, Text or Zip File.	
Cancel		Send

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.

< ֎ Allison Hamilton 🛛		
Applied For: Sales (34) × View Requisition Source: Recruiter	Offer Sent Applied: 05/09/2022 Updated: 10/11/2022	
Workflow Step Offer Accepted Offer Rejected Reject		
Workflow Summary Application Evaluations 0 Feed Video 0 Notes 0	Messages 3 Tasks Activity	*
Workflow		
Offer Generation Offer Letter has been sent with Jobvite eSignature on October 11, 2022 10:54:46 AM Offer Letter expiration date: October 14, 2022 10:54:46 AM		

Expand the Offer Generation options by clicking the + icon.

Workflow	Summary	Application	pplication Evaluations 0 Feed Video 0 Notes 0		Notes ዐ	Messages 3	Tasks	Activity	*	
Workflow Offer Offer Offer	<mark>Generation</mark> Letter has beer Letter expiratio	n sent with Jobvit on date: October	te eSignature on Oct 14, 2022 10:54:46 A	tober 11, 2 .M	2022 10:54:46	AM				

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.

Work	low	Summary	Application	Evaluations ዐ	Feed	Video ዐ	Notes ዐ	Messages 3	Tasks	Activity	*
Workf	low										
0	Offer Ge	eneration									
ſ	Resen	d To Candidat	te Void Off	er Letter View	/ Offer Le	tter					
	Offer Letter has been sent with Jobvite eSignature on October 11, 2022 10:54:46 AM Offer Letter expiration date: October 14, 2022 10:54:46 AM										
	Signer								Stat	us	



Upon the candidate completing their electronic signature, the requestor will receive the Offer letter – *Jobvite eSignature Completed* notification.

Messages						
Filter By	Act	tions:	×	Sort By: v	1 - 50 of 4909	< >
Folder		From	Subject		Туре	Date
Inbox × T	0	System Michael Carrino	Signed Offer I	etter Mcarrino 123	Application	10/11/202

User will also see the status update within the candidate's Offer Generation workflow step.

< 😁 Allison Hamilton 🛛	
Applied For: Sales (34) × View Requisition	
Source: Recruiter	Offer Sent
	Applied: 05/09/2022
	Updated: 10/11/2022
Workflow Step Offer Accepted Offer Rejected Reject	
Workflow Summary Application Evaluations 0 Feed Video 0	Notes 🛈 Messages 3 Tasks Activity 🔆
Workflow	
Offer Generation	
View Offer Letter View Cover Page Re-Generate Offer	
Offer Letter signed by all recipients on October 11, 2022 11:16:24 AM	
Signer	Status
Allison Hamilton (Candidate)	Signed October 11, 2022 11:16:24 AM

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

< 🛯 Allison Hamilton o	
Applied For: Sales (34) × •	Offer Sent Applied: 05/09/2022 Updated: 10/11/2022
Workflow Summary Application Evaluations 0 Feed Video 0 N	Notes 🕕 Messages 3 Tasks Activity 🔅
Workflow	
Offer Generation View Offer Letter View Cover Page Re-Generate Offer Offer Letter signed by all recipients on October 11, 2022 11:16:24 AM	



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.

Menu < Integrations	
Calendars	LinkedIn
Enter your Google or Outlook credentials to enable calendering options within Smart Scheduler.	Enter your LinkedIn credentials here to post jobs to LinkedIn and enable LinkedIn's Recruiter System Connect (RSC).
view Calendars	View LinkedIn
HireRight	SilkRoad RedCarpet
Enter your HireRight credentials here to activate background check.	Enter your SilkRoad credentials here to activate RedCarpet onboarding.
View HireRight	View SilkRoad RedCarpet
SuccessFactors	DocuSign
Enter your SuccessFactors credentials here to integrate with their Recruiting module.	Enable DocuSign integration to support eSignature for offer letters.
View SuccessFactors	View DocuSign

Click Disconnect.

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

Approval Settings	Candidate Settings
Set up approval workflows for requisitions and hiring offers.	Customize settings related to your candidates.
	View Candidate Settings
View Approval 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.



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 \rightarrow Admin \rightarrow ATS \rightarrow View Offer Settings \rightarrow View Offer Letter Templates.

Click Edit.



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
E 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 Introduction	2 Download Template	3 4 Upload Prev	5 iew Confirmation	Exit Back	Next
Step 3: Up	load				
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 F	le No file chosen				



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** \rightarrow **Admin** \rightarrow **ATS** \rightarrow **View Offer Settings** \rightarrow **View Offer Forms** \rightarrow select the desired Offer Form.

Click Offer Letter Templates.



Select the newly named Offer Letter Template.

Applied Offer Letter Templates		×		
Select which offer letter templates to be used with the form. Manage or update offer letters, click here.				
Q Search for Offer Letter Template	1 - 5 of 5			
Name		Apply		
Changing_Paragraph_Verbiage_DON.docx	Preview			
ESignFullTimeOfferLetter.doc	Preview			
FullTimeOfferLetter1.doc	Preview			
PartTimeOfferLetter.doc	Preview			
PartTimeOfferLetterEsig.doc	Preview			
	1 - 5 of 5			
	Cancel	Apply		

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 \rightarrow Admin \rightarrow ATS \rightarrow View Offer Settings \rightarrow View Offer Letter Templates \rightarrow Edit \rightarrow click Delete next to the old Offer Letter Template.



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 <u>beta@jobvite.com</u> 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.