# Paperworkr and E-Signature User Guide



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# Signing in to Paperworkr

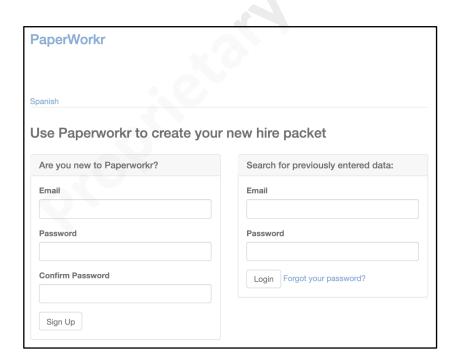
There are two ways to sign in to Paperworkr. You can sign up as a new user or you can login using a previously entered email and password from the sign-in page. Spanish speaking users can click the blue "Spanish" link at the top to view site pages and paperwork that can be translated into Spanish.

## Signing in for the first time

- 1. New users can create a Paperworkr account by entering their email and a password that they create under the "Are you new to Paperworkr?" heading on the left side.
- 2. When a new user fills out this section and clicks the Sign Up button, a message with a confirmation link will be sent to their email address.
  - a. The user should go to their email account and click on the "Confirm my account" link.
  - b. This link will redirect them to a page that allows them to enter their login credentials and begin using the site.

## Signing in as an existing user

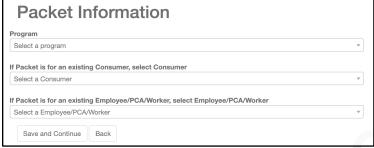
- 1. Returning users can also access their accounts on this page under the "Search for previously entered data" heading on the right side.
  - a. Once logged in, users can view and update information on hiring packets that they previously entered into the system. Users can also electronically sign any completed hiring packets that are ready for their signature.



# **Adding a Hiring Packet**

After signing in for the first time, the next page will allow the user to start a Hiring Packet.



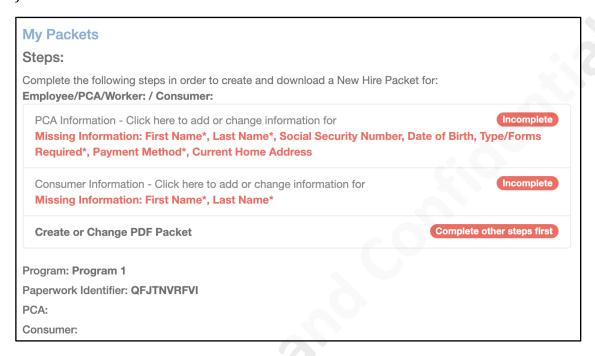


- 1. To start a new hiring packet, the user can click on the blue "Add Consumer/Hiring Packet" button under the "Consumers/Hiring Packets" heading.
- 2. The user will be required to select the Consumer's Program from the dropdown list.
- 3. The dropdown lists for selecting a Consumer and Employee can be left blank.
  - a. These dropdown lists will only populate options for Consumer and Employee names if the user already has an existing Packet in the system.
- 4. Click the Save and Continue button.
- 5. The screen will now display a list of Hiring Packets started by the user with the newest at the top.
  - a. The new Packet will show the selected Program, but the Consumer and Employee fields will be blank until the names are entered on the next page.
  - b. To change the Program, click on the blue "Edit" link underneath the Packet.
  - c. To start an additional packet, click on "Add Consumer/Hiring Packet".
- 6. Proceed to the next page to begin entering information for the new Packet by clicking on the red "Click Here for Next Step" button.



# **Next Steps**

After pressing Click Here for Next Step, the user will be taken to the screen that will show them step by step instructions on how to create and download their New Hire Packet. If a form is red, then it is missing information. Click on it to enter the missing information listed. The first steps are to complete the PCA/Employee Information and Consumer Information forms.



The user can click on the blue "My Packets" link at the top of the page to go back to their list of Hiring Packets.

## **PCA/Employee Information**

- 1. The user will enter basic personal information such as the employee's First and Last Name, Social Security Number, Date of Birth, Phone Number, Payment Method, and Current Home/Physical Address.
- 2. From the Type/Forms Required dropdown, the user should select:
  - a. "New" if all forms are required
  - b. "Existing" if only one or more forms are required
- 3. Click Save and Continue and go back to the Steps screen.

### **Consumer Information**

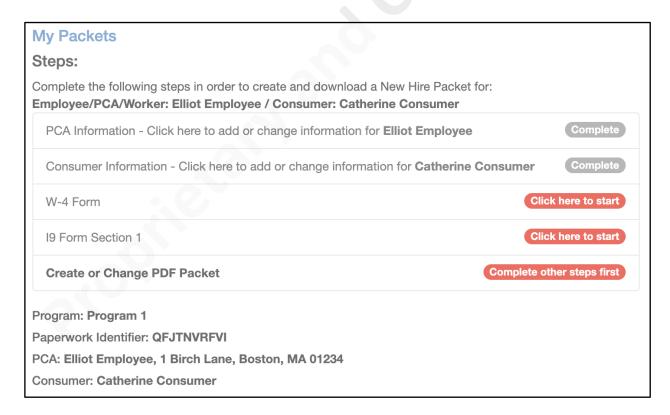
- 1. The user will enter the consumer's first name and last name.
- 2. If any other information is required, the user will be prompted to fill it out.
- 3. Click Save and Continue and go back to the Steps screen.

## **Validations and Missing Information**

- 1. Required information is marked in red or with an asterisk.
  - a. Required fields may vary based on specific program requirements.
- 2. Validations: If the information entered is not formatted correctly (ex. The phone number is the wrong number of digits), the user will receive an error message. They cannot save the form until the error is corrected.
- 3. Missing Information: If a user does not fill out the forms completely or misses required information, the form will remain marked as "incomplete".
- 4. Once the required information is filled out correctly and completely, the form will be marked as "complete".
- 5. As each form is completed, new forms will populate the list.

#### **Forms**

Once the PCA/Employee and Consumer Information are complete, the user can press the red "Click here to start" button on any of the populated forms such as the W4 and I9. Other forms may populate based on specific program requirements. Each of these forms needs to be completed before the user can create their Packet.



#### W4 Form

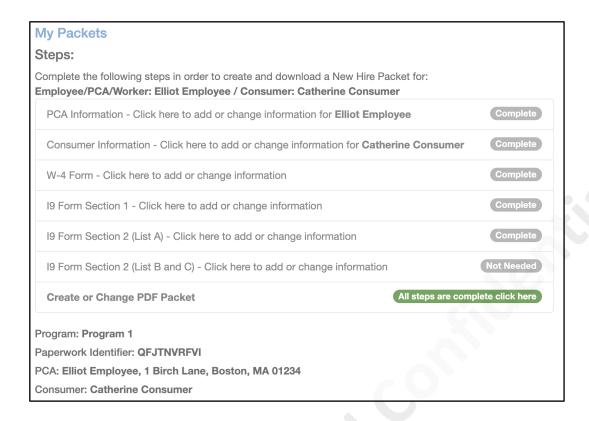
Users can view a blank W4 by clicking on the blue "Click here to view a blank W4" link or read W4 instructions by clicking on the blue "Click here to view instructions" link.

- 1. Select Marital Status (required)
- 2. If the employee meets both conditions for exemption from withholding, they should check the "Exempt" checkbox.
  - a. If Exempt is selected, Steps 2-4 must be blank.
- 3. If the employee is not exempt, they should fill out the fields in Steps 2-4 only if they apply to the employee.
- 4. Select Save and Continue and return to the Steps screen.

#### **19 Form**

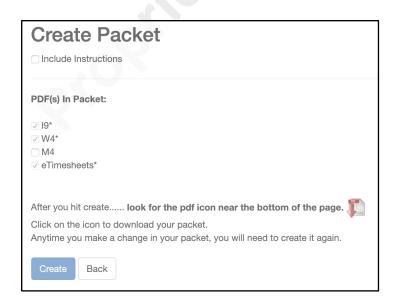
Users can view a blank 19 by clicking on the blue "Click here to view a blank 19" link or read 19 instructions by clicking on the blue "Click here to view 19 instructions" link.

- 1. Section 1 An employee can view the list of documents they need to present for Section 2 by clicking on the blue "Click here to view a List of Acceptable Documents" link.
  - a. Select Citizen Status (required)
  - b. Select Preparer and/or Translator Certification (required)
  - c. Click on Save and Continue and return to the Steps screen.
- 2. Section 2 An employee can either enter information for one document in List A or enter information for one document in BOTH List B and List C.
  - a. Select document type from the drop down (required)
  - b. Enter Issuing Authority (required)
  - c. Enter Document Number (required)
  - d. Enter Expiration Date (required)
    - i. Expiration Date cannot be expired
    - ii. Select Not Applicable if the document does not have an expiration date
  - e. Click on Save and Continue and return to the Steps screen.



#### **Create New Hire Packet**

- 1. When all of the forms are complete, the user can create a packet by clicking on the green button labeled "All steps are complete click here".
  - a. The Create Packet screen will show the user which forms are in the packet. All required forms are listed with a checkbox next to them and cannot be unchecked by the user. If there are any optional forms, the user can uncheck the box and it will not be included in the packet.
- 2. The user can click the "Create" button to create the packet.

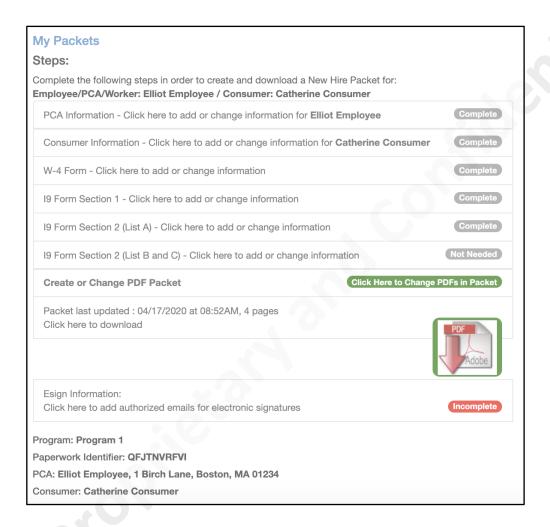


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#### **Download New Hire Packet**

Once the packet has been created, the user can click the large PDF icon to view and download their packet.

Anytime a change is made to any of the Forms, the user must create an updated version of the packet by clicking on the green button in the "Create or Change PDF Packet" section. The date and time of the last packet is displayed so the user can see when it was last updated.

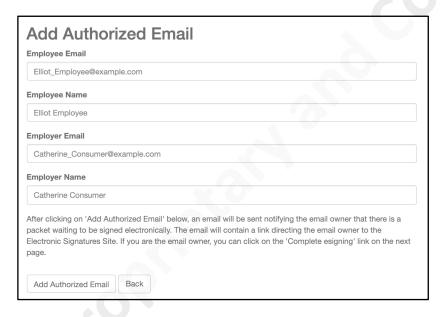


# **Steps to Use Electronic Signatures**

The employee and consumer can either print out the packet or use electronic signatures to sign where required on the forms. Once a packet is created, a new section called "Esign Information" will populate underneath the PDF icon on the Steps page. This section will direct the user to next steps for how to sign the packet electronically.

#### **Send Authorized Emails**

- 1. If the user would like to electronically sign their forms, they can click the "incomplete" button next to "Esign Information".
- 2. On the next page, the employee email and employee name that the user entered for the packet will automatically populate the Employee fields. The user will need to enter the email and name of the signing employer/consumer in the Employer fields.
  - a. The email address entered here for Electronic Signatures must be the same email address the user will use to sign into their Paperworkr account.
  - b. The Employee and the Employer cannot share an email address. Their email addresses need to be different, so that each user can have their own Paperworkr account and e-sign separately.
- 3. Once the user has confirmed the information on the form is correct for both signing parties, they can then click "Add Authorized Email".
- 4. After clicking on "Add Authorized Email", an email will be sent to both of the email addresses entered on the form, notifying the email owner that there is a packet ready to be signed electronically. The email will contain written steps and a link directing each user to the Electronic Signatures site.



# Packet Ready for your Electronic Signature! Paperworkr <no-reply@annkissam.com> to me ▼ Your packet is ready to be electronically signed. Please follow these steps: 1. Click here to be directed to Paperworkr where you will be able to add your signature(s) electronically. 2. If you are new to Paperworkr, create a new account (otherwise, login). NOTE: You MUST use the same email address that received this email. 3. If you create a new account, you will be directed to confirm your account. 4. Once signed in, click on the blue Esignable Packets link then click on Esign.

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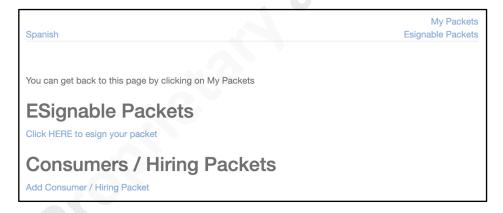
# **Access Electronic Signatures Site**

To access the E-signatures site, the Employee and Employer must each login into Paperworkr using their own separate account, either through an existing account or by creating a new account. The email address they used for their Paperworkr account needs to be the same email address where they received the email link to sign the packet.

#### **New User Access**

- 1. If the user is new to Paperworkr, the email link will redirect the user to the Paperworkr Sign-in page, where they can create an account.
  - a. They MUST use the same email address where they received the email link.
- 2. Once the user creates a new account, they will receive another email which will direct them to confirm their account.
- 3. Once signed into Paperworkr, the user can click on the blue "Click HERE to esign your packet" link under "ESignable Packets" *or* click on the blue "Esignable Packets" link in the upper right corner of the page. Both links will lead the user to the same "Esignable Packets" page where they can click the blue ESign ink to access the E-Signatures site for their packet.

Once the user has their first packet ready for E-Signature, the "ESignable Packets" heading will appear every time they sign into Paperworkr. The blue "Esignable Packets" link will also appear in the top right corner of all main pages. Either link will take the user to the "Esignable Packets" page where they can view any Packets ready for their E-Signature.





## **Existing User Access**

### Option 1: Use the email link

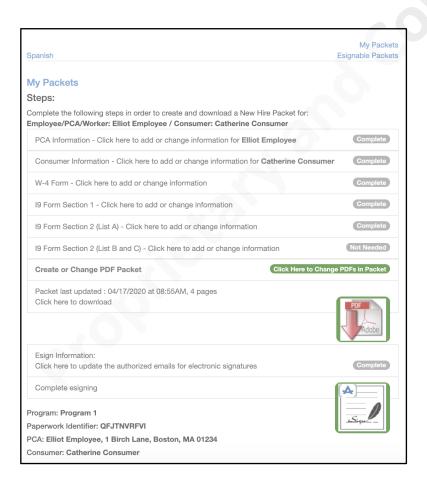
- a. If the user has an existing account and is already logged into Paperworkr, the email link will direct the user to the E-Signatures site.
  - i. Note: The existing user needs to be logged into Paperworkr, otherwise the email link will redirect the user to the Paperworkr Sign-in page.

## Option 2: Login to Paperworkr

a. If the user has an existing account, they can login to Paperworkr and click on either the blue link under the "ESignable Packets" heading, and then click on ESign to access the E-Signatures site.

## Option 3: Complete E-Signing on the Steps Page

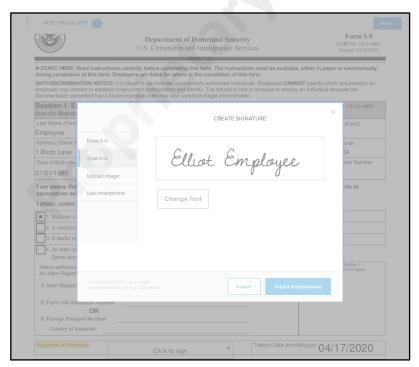
a. If the user created the Packet and completed adding the authorized emails, they will be directed back to the Steps page, where they can click on the green "Complete esigning" link to access the E-Signature site.



# **Complete Electronic Signatures**

Once the Employee and Employer have successfully signed into E-Signatures using their separate accounts, the E-Signatures site will direct each user where their signature is required based on the email address associated with their account.

- 1. Once the user signs into the E-Signatures site, they will be redirected to the "Electronic Record and Signature Disclosure" page.
  - a. They should read the disclosure and Decline or Accept the terms.
  - b. Clicking the checkbox at the bottom and pressing Accept, will direct the user to a program called HelloSign to electronically sign the paperwork.
- 2. On the next screen, the user should be able to see their completed forms with highlighted spaces in which a signature should be included.
  - a. To begin signing their forms, they can click the blue "Get Started" button in the top right corner.
  - b. The user should then click into the form itself where it says "Click to sign".
  - c. A window will appear allowing them to write in their name using the touch pad, or type in their name.
  - d. From there, they can choose to insert the signature in one field by clicking "Insert", or insert it on all of the forms automatically by clicking "Insert Everywhere".
  - e. Once all of the required fields have been signed, the user can click "Continue" in the top right hand corner.
  - f. Finally, the user can click "I Agree" at the top of the screen to confirm they understand that they have legally signed the documents.

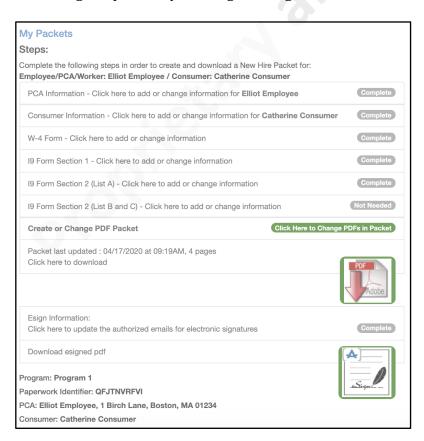


# **Download Signed Packet**

- 1. Once both the employee and consumer have completed e-signing, the user who created the packet can view and download their e-signed packet by clicking on the green "Download esigned pdf" button at the bottom of the Steps page.
  - a. If the user who created the packet has not e-signed, the status will say "Complete esigning".
  - b. If only the user who created the packet has e-signed, the status will say "Awaiting Other Signatures" until the other user has e-signed.
- 2. The hiring organization staff will be able to view and download the e-signed packet once the packet is completed and e-signed by both the employee and consumer. No further action is needed.

Anytime a change is made to any of the forms in the packet, the user must create an updated packet and repeat the e-signing process.

- a. To create an updated packet, the user must click on the green button in the "Create or Change PDF Packet" section above the PDF icon.
- b. The user must then click on the "incomplete button" in the "Esign information" section to re-enter the information and send the authorized emails for E-Signatures.
- c. Both the employee and consumer need to login and e-sign the updated packet separately.
- d. The user who created the packet can then view and download their updated esigned packet by clicking on the green "Download esigned pdf" button.



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# **Signed Packet Example**

Below are examples of the 19 and W4 taken from the Packet. It shows all the fields are filled out automatically and e-signed by the employee and consumer in the appropriate places.

						QFJTNVRFVI			
	Employment Eligibility Verification Department of Homeland Security U.S. Citizenship and Immigration Services				USCIS Form I-9 OMB No. 1615-0047 Expires 10/31/2022				
START HERE: Read instruc	tions carefully	before co	mpletir	a this for	m. The instruct	ions must be av	ailable,	either in pa	aper or electronically,
during completion of this form ANTI-DISCRIMINATION NOTIC employee may present to estab documentation presented has a	n. Employers a CE: It is illegal to lish employmen	re liable f discrimin t authoriza	or error ate aga ation and	s in the c nst work- l identity.	ompletion of th authorized indivi The refusal to hi	is form. duals. Employers re or continue to	CANNO	OT specify w	hich document(s) an
Section 1. Employee than the first day of emplo						st complete and	d sign \$	Section 1 o	f Form I-9 no later
Last Name (Family Name)		First Na	ıme (Gi\	en Name	)	Middle Initial	Other	Last Name	s Used (if any)
Employee		Elliot				N/A	N/A		
Address (Street Number and N	lame)		Apt. N	umber	City or Town			State	ZIP Code
1 Birch Lane			N/A		Boston			MA	01234
Date of Birth (mm/dd/yyyy)	U.S. Social Se			Employ	ee's E-mail Add	ress			Telephone Number
01/01/1990	123 - 4	5 6	789					) -	
I am aware that federal la connection with the comp	oletion of this	form.					r use (	of false do	ocuments in
l attest, under penalty of p	perjury, that I	am (che	ck one	of the f	ollowing box	es):			
1. A citizen of the United S	itates								
2. A noncitizen national of	the United State	s (See in	struction	s)					
3. A lawful permanent resid	dent (Alien Re	egistration	Numbe	r/USCIS I	Number):				
4. An alien authorized to w									
Some aliens may write '							-		
Aliens authorized to work mus An Alien Registration Number	st provide only o r/USCIS Numbe	one of the r OR Forr	followin n I-94 A	g docume dmission	nt numbers to co Number OR For	omplete Form I-9: eign Passport Nu	mber.	Do N	R Code - Section 1 lot Write In This Space
Alien Registration Number     OR	/USCIS Numbe					_			
2. Form I-94 Admission Num	ber:								
OR									
3. Foreign Passport Number:						_			
Country of Issuance:									
Signature of Employee	El	liot (	Emp	loyee		Today's Date	e (mm/d	<sup>(d/yyyy)</sup> 04	4/17/2020
Preparer and/or Trans I did not use a preparer or to Fields below must be comp	slator Certi ranslator. [ oleted and sign	ficatio A prepa	n (che arer(s) a n prepa	eck one nd/or trans rers and	slator(s) assisted for translators		yee in	completing	g Section 1.)
I attest, under penalty of p knowledge the information			sisted	in the co	impletion of S	ection 1 of thi	s torm	and that	to the best of my
Signature of Preparer or Trans							Today's	Date (mm/	dd/yyyy)
Last Name (Family Name)					First Nam	e (Given Name)			
	lame)			C	ity or Town			State	ZIP Code
Address (Street Number and N									

W-4	Em	ployee's Withholding	Certificate		OMB No.	1545-0074				
Department of the Tr Internal Revenue Se	Basury	hat your employer can withhold the c  Give Form W-4 to your em  Your withholding is subject to revi	ployer.	your pay	20	20				
Step 1:	(a) First name and middle initial	Last name	ow by the into.	(b)	Social securi	ty number				
Enter	Elliot	Employee		12	3-45-6789					
Personal	Address 1 Birch Lane			► E nar	▶ Does your name match to name on your social securi- card? If not, to ensure you g					
Information	City or town, state, and ZIP code									
-	Boston, MA 01234			SS	SSA at 800-772-1213 or go www.ssa.gov.					
	(c) Single or Married filing sep									
		Married filling jointly (or Qualifying widow(e/i)  Head of household (Check only if you're unmarried and pay more than half the costs of keeping up a home for yourself and a qualifying individue.								
		you; otherwise, skip to Step 5. se the online estimator, and priva		nation o	on each step	, who ca				
Step 2:		ou (1) hold more than one job a				ur spou:				
Multiple Jobs or Spouse	Do only one of the follo		on moome earned from all o	or these	JUDS.					
or Spouse Works		owing. t <i>www.irs.gov/W4App</i> for most a	courate withholding for this	eton (ar	ud Stone 2	D: or				
	.,	t www.irs.gov/w4.App for most a Worksheet on page 3 and enter the				,,				
	(c) If there are only two	jobs total, you may check this bo with similar pay; otherwise, more	x. Do the same on Form W-	4 for the	other job. T	his opti				
		ubmit a 2020 Form W-4 for all of		ouse) h	nave self-em	nployme				
		b) on the Form W-4 for the highe								
Step 3: Claim Dependents		200,000 or less (\$400,000 or less								
Claim	Multiply the number	of qualifying children under age 17								
Claim	Multiply the number	of qualifying children under age 17	by \$2,000 ► <u>\$</u>	_	3 \$					
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Claim Dependents  Step 4 (optional): Other Adjustments  Step 5: Sign	Multiply the number  Multiply the number  Add the amounts above  (a) Other income (not this year that won't include interest, divide  (b) Deductions. If you and want to reduce enter the result here  (c) Extra withholding.	of qualifying children under age 17 of other dependents by \$500 s and enter the total here from jobs). If you want tax withhave withholding, enter the amountends, and retirement income lends, and retirement income expect to claim deductions oth your withholding, use the Deduc Enter any additional tax you wan ure that this certificate, to the best of	by \$2,000 ▶ \$  ▶ \$  eld for other income you ex t of other income here. This er than the standard deductions Worksheet on page 3 t withheld each pay period my knowledge and belief, is tru	e, correct 04/1 Date	4(a) \$ 4(b) \$ 4(c) \$					

