Paperworkr and E-Signature

User Guide

ANNKISSAM

Table of Contents

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.

PaperWorkr

Spanish

Use Paperworkr to create your new hire packet

Are you new to Paperworkr?	Search for previously entered data:
Email	**Email**
Password	**Password**
Confirm Password	Login Forgot your password?
Sign Up	

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.

My Packets

Steps:

Complete the following steps in order to create and download a New Hire Packet for:
Employee/PCA/Worker: / Consumer:

PCA Information - Click here to add or change information for   `Incomplete`
Missing Information: First Name*, Last Name*, Social Security Number, Date of Birth, Type/Forms Required*, Payment Method*, Current Home Address

Consumer Information - Click here to add or change information for   `Incomplete`
Missing Information: First Name*, Last Name*

Create or Change PDF Packet   `Complete other steps first`

Program: **Program 1**
Paperwork Identifier: **QFJTNVRFVI**
PCA:
Consumer:

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.

My Packets

Steps:

Complete the following steps in order to create and download a New Hire Packet for:
Employee/PCA/Worker: Elliot Employee / Consumer: Catherine Consumer

PCA Information - Click here to add or change information for **Elliot Employee**	Complete
Consumer Information - Click here to add or change information for **Catherine Consumer**	Complete
W-4 Form	Click here to start
I9 Form Section 1	Click here to start
Create or Change PDF Packet	Complete other steps first

Program: **Program 1**

Paperwork Identifier: **QFJTNVRFVI**

PCA: **Elliot Employee, 1 Birch Lane, Boston, MA 01234**

Consumer: **Catherine Consumer**

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.

I9 Form

Users can view a blank I9 by clicking on the blue "Click here to view a blank I9" link or read I9 instructions by clicking on the blue "Click here to view I9 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.

My Packets

Steps:

Complete the following steps in order to create and download a New Hire Packet for:

Employee/PCA/Worker: Elliot Employee / Consumer: Catherine Consumer

PCA Information - Click here to add or change information for **Elliot Employee**	Complete
Consumer Information - Click here to add or change information for **Catherine Consumer**	Complete
W-4 Form - Click here to add or change information	Complete
I9 Form Section 1 - Click here to add or change information	Complete
I9 Form Section 2 (List A) - Click here to add or change information	Complete
I9 Form Section 2 (List B and C) - Click here to add or change information	Not Needed
Create or Change PDF Packet	All steps are complete click here

Program: **Program 1**

Paperwork Identifier: **QFJTNVRFVI**

PCA: **Elliot Employee, 1 Birch Lane, Boston, MA 01234**

Consumer: **Catherine Consumer**

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.

Create Packet

☐ Include Instructions

PDF(s) In Packet:

☑ I9*
☑ W4*
☐ M4
☑ eTimesheets*

After you hit create...... **look for the pdf icon near the bottom of the page.** 🗎

Click on the icon to download your packet.
Anytime you make a change in your packet, you will need to create it again.

[Create] [Back]

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.

Add Authorized Email

Employee Email

Elliot_Employee@example.com

Employee Name

Elliot Employee

Employer Email

Catherine_Consumer@example.com

Employer Name

Catherine Consumer

After clicking on 'Add Authorized Email' below, an email will be sent notifying the email owner that there is a packet waiting to be signed electronically. The email will contain a link directing the email owner to the Electronic Signatures Site. If you are the email owner, you can click on the 'Complete esigning' link on the next page.

Add Authorized Email   Back

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.

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.

Spanish	My Packets Esignable Packets

You can get back to this page by clicking on My Packets

ESignable Packets

Click HERE to esign your packet

Consumers / Hiring Packets

Add Consumer / Hiring Packet

Spanish	My Packets Esignable Packets

Esignable Packets

Last Updated At	Employee/PCA/Worker Email	Employer Email	
04/17/2020 08:55 AM	Elliot_Employee@example.com	Catherine_Consumer@example.com	ESign

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 e-signed packet by clicking on the green "Download esigned pdf" button.

Signed Packet Example

Below are examples of the I9 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.

Form I-9 — Section 1 (left form)

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 instructions carefully before completing this form. The instructions must be available, either in paper or electronically, during completion of this form. Employers are liable for errors in the completion of this form.

ANTI-DISCRIMINATION NOTICE: It is illegal to discriminate against work-authorized individuals. Employers CANNOT specify which document(s) an employee may present to establish employment authorization and identity. The refusal to hire or continue to employ an individual because the documentation presented has a future expiration date may also constitute illegal discrimination.

Section 1. Employee Information and Attestation *(Employees must complete and sign Section 1 of Form I-9 no later than the first day of employment, but not before accepting a job offer.)*

Last Name *(Family Name)*	First Name *(Given Name)*	Middle Initial	Other Last Names Used *(if any)*
Employee	Elliot	N/A	N/A

Address *(Street Number and Name)*	Apt. Number	City or Town	State	ZIP Code
1 Birch Lane	N/A	Boston	MA	01234

Date of Birth *(mm/dd/yyyy)*	U.S. Social Security Number	Employee's E-mail Address	Employee's Telephone Number
01/01/1990	123 - 45 - 6789		() -

I am aware that federal law provides for imprisonment and/or fines for false statements or use of false documents in connection with the completion of this form.

I attest, under penalty of perjury, that I am (check one of the following boxes):

☑ 1. A citizen of the United States
☐ 2. A noncitizen national of the United States *(See instructions)*
☐ 3. A lawful permanent resident *(Alien Registration Number/USCIS Number)*:
☐ 4. An alien authorized to work *until* (expiration date, if applicable, mm/dd/yyyy):
Some aliens may write "N/A" in the expiration date field. *(See instructions)*

Aliens authorized to work must provide only one of the following document numbers to complete Form I-9:
An Alien Registration Number/USCIS Number OR Form I-94 Admission Number OR Foreign Passport Number.

1. Alien Registration Number/USCIS Number:
OR
2. Form I-94 Admission Number:
OR
3. Foreign Passport Number:
Country of Issuance:

QR Code - Section 1
Do Not Write In This Space

Signature of Employee	*Elliot Employee*	Today's Date *(mm/dd/yyyy)* 04/17/2020

Preparer and/or Translator Certification (check one):
☑ I did not use a preparer or translator. ☐ A preparer(s) and/or translator(s) assisted the employee in completing Section 1.
(Fields below must be completed and signed when preparers and/or translators assist an employee in completing Section 1.)

I attest, under penalty of perjury, that I have assisted in the completion of Section 1 of this form and that to the best of my knowledge the information is true and correct.

Signature of Preparer or Translator	Today's Date *(mm/dd/yyyy)*

Last Name *(Family Name)*	First Name *(Given Name)*

Address *(Street Number and Name)*	City or Town	State	ZIP Code

STOP *Employer Completes Next Page* STOP

Form I-9 — Section 2 (right form)

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

Section 2. Employer or Authorized Representative Review and Verification
(Employers or their authorized representative must complete and sign Section 2 within 3 business days of the employee's first day of employment. You must physically examine one document from List A OR a combination of one document from List B and one document from List C as listed on the "Lists of Acceptable Documents.")

Employee Info from Section 1	Last Name *(Family Name)* Employee	First Name *(Given Name)* Elliot	M.I. 1	Citizenship/Immigration Status

List A Identity and Employment Authorization	OR	List B Identity	AND	List C Employment Authorization

Document Title: U.S. Passport
Issuing Authority: U.S. Department of State
Document Number: 123456789
Expiration Date (if any) (mm/dd/yyyy): 01/01/2025

Additional Information

QR Code - Sections 2 & 3
Do Not Write In This Space

Certification: I attest, under penalty of perjury, that (1) I have examined the document(s) presented by the above-named employee, (2) the above-listed document(s) appear to be genuine and to relate to the employee named, and (3) to the best of my knowledge the employee is authorized to work in the United States.

The employee's first day of employment (mm/dd/yyyy): (See instructions for exemptions)

Signature of Employer or Authorized Representative *Catherine Consumer*	Today's Date *(mm/dd/yyyy)* 04/17/2020	Title of Employer or Authorized Representative

Last Name of Employer or Authorized Representative Consumer	First Name of Employer or Authorized Representative Catherine	Employer's Business or Organization Name

Employer's Business or Organization Address *(Street Number and Name)*	City or Town	State	ZIP Code

Section 3. Reverification and Rehires *(To be completed and signed by employer or authorized representative.)*

A. New Name (if applicable)

Last Name *(Family Name)*	First Name *(Given Name)*	Middle Initial	B. Date of Rehire *(if applicable)* Date *(mm/dd/yyyy)*

C. If the employee's previous grant of employment authorization has expired, provide the information for the document or receipt that establishes continuing employment authorization in the space provided below.

Document Title	Document Number	Expiration Date (if any) *(mm/dd/yyyy)*

I attest, under penalty of perjury, that to the best of my knowledge, this employee is authorized to work in the United States, and if the employee presented document(s), the document(s) I have examined appear to be genuine and to relate to the individual.

Signature of Employer or Authorized Representative	Today's Date *(mm/dd/yyyy)*	Name of Employer or Authorized Representative

Form I-9 10/21/2019 — Page 2 of 3

Form W-4 (bottom form)

QFJTNVRFVI

Form W-4
Department of the Treasury
Internal Revenue Service

Employee's Withholding Certificate
▶ Complete Form W-4 so that your employer can withhold the correct federal income tax from your pay.
▶ Give Form W-4 to your employer.
▶ Your withholding is subject to review by the IRS.

OMB No. 1545-0074
2020

Step 1: Enter Personal Information

(a) First name and middle initial	Last name	(b) Social security number
Elliot	Employee	123-45-6789

Address: 1 Birch Lane
City or town, state, and ZIP code: Boston, MA 01234

▶ Does your name match the name on your social security card? If not, to ensure you get credit for your earnings, contact SSA at 800-772-1213 or go to www.ssa.gov.

(c) ☑ Single or Married filing separately
☐ Married filing jointly (or Qualifying widow(er))
☐ 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 individual.)

Complete Steps 2–4 ONLY if they apply to you; otherwise, skip to Step 5. See page 2 for more information on each step, who can claim exemption from withholding, when to use the online estimator, and privacy.

Step 2: Multiple Jobs or Spouse Works

Complete this step if you (1) hold more than one job at a time, or (2) are married filing jointly and your spouse also works. The correct amount of withholding depends on income earned from all of these jobs.

Do only one of the following.

(a) Use the estimator at www.irs.gov/W4App for most accurate withholding for this step (and Steps 3–4); or
(b) Use the Multiple Jobs Worksheet on page 3 and enter the result in Step 4(c) below for roughly accurate withholding; or
(c) If there are only two jobs total, you may check this box. Do the same on Form W-4 for the other job. This option is accurate for jobs with similar pay; otherwise, more tax than necessary may be withheld . . . . . ▶ ☐

TIP: To be accurate, submit a 2020 Form W-4 for all other jobs. If you (or your spouse) have self-employment income, including as an independent contractor, use the estimator.

Complete Steps 3–4(b) on Form W-4 for only ONE of these jobs. Leave those steps blank for the other jobs. (Your withholding will be most accurate if you complete Steps 3–4(b) on the Form W-4 for the highest paying job.)

Step 3: Claim Dependents

If your income will be $200,000 or less ($400,000 or less if married filing jointly):

Multiply the number of qualifying children under age 17 by $2,000 ▶ $
Multiply the number of other dependents by $500 . . . . ▶ $
Add the amounts above and enter the total here . . . . 3 | $

Step 4 (optional): Other Adjustments

(a) Other income (not from jobs). If you want tax withheld for other income you expect this year that won't have withholding, enter the amount of other income here. This may include interest, dividends, and retirement income . . . . 4(a) | $
(b) Deductions. If you expect to claim deductions other than the standard deduction and want to reduce your withholding, use the Deductions Worksheet on page 3 and enter the result here . . . . 4(b) | $
(c) Extra withholding. Enter any additional tax you want withheld each pay period 4(c) | $

Step 5: Sign Here

Under penalties of perjury, I declare that this certificate, to the best of my knowledge and belief, is true, correct, and complete.

Elliot Employee	04/17/2020
Employee's signature (This form is not valid unless you sign it.)	Date

Employers Only

Employer's name and address Catherine Consumer	First date of employment	Employer identification number (EIN)

For Privacy Act and Paperwork Reduction Act Notice, see page 3. | Cat. No. 10220Q | Form **W-4** (2020)

01/01/1990