

# Living Handbook Plus

Process & Procedure

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# Preparation

- Your dedicated HR Specialist will prepare/update a *first draft* of your employee handbook. This first draft will include any and all policies that you wish to include, along with the State/Federal policies that are required.
- We will ask you to send us your current and full employee list as a spreadsheet. This should include the employee's *first and last name and email address*. If any of your employees would prefer/need a Spanish version, please notate this on the spreadsheet.
- Once the handbook is finalized and approved by you, we can *edit/format* it in any way you choose (as a .word or .PDF document).



Email to Signers

Send From REQUIRED

Me

Please select the Admin who will be sending out the email. Either 'Me' (yourself) or one of the available Admins.

Email Subject REQUIRED

ACTION REQUESTED: Please review and sign this Handbook

Note for Signers REQUIRED

We're excited to send you the latest edition of the Company employee handbook. In addition to providing details about policies, benefits, and other important information about the company, the handbook outlines opportunities available to you as a member of our team, and our expectations for successful employment. Please review and acknowledge your receipt of the handbook. If you have questions about any policy in the handbook, please contact your (supervisor, manager, HR manager, etc.)

Acknowledgement policy will need to be present in the Handbook to successfully capture e-signatures from employees.

## Customization

We can format the final handbook to include a cover page, photo's, tables, and more. If there is something that you would like in your handbook, we can add it.

Prior to distribution, we can customize and edit some verbiage for the automated email to employees. We can choose:

- Who the email will come **from**
- What the *subject* of the email will be
- The opening paragraph/*Note for Signers* in the automated email

# Employee Distribution

1. Once the handbook is finalized and ready to be distributed to the employees (either upon initiation or after each policy update), your employees will receive an email prompting them to log into the system and e-sign the handbook.
2. A copy of the email that your employees will receive is below:



Dear **Employee Name**

We're excited to send you the latest edition of the Company employee handbook. In addition to providing details about policies, benefits, and other important information about the company, the handbook outlines opportunities available to you as a member of our team, and our expectations for successful employment. Please review and acknowledge your receipt of the handbook. If you have questions about any policy in the handbook, please contact your manager.

Click [here](#) to review and sign the handbook.

If the link does not work for you, copy and paste this url in your browser window:

<https://esignature.thinkhr.com/handbook?token=64082316-5a8f-11eb-a82d-dd99a1fd6254>

OR

Here's how to review and sign your handbook

1. Log into <https://apps.thinkhr.com> with your username and password.
2. Click 'View' under Documents.
3. Click 'Sign Now' to sign the handbook.

Username: **Employee Username**

If you need to create or reset your password, click here: <https://apps.thinkhr.com/reset-password/CWM0CJMXYZN4ATMXYSM>

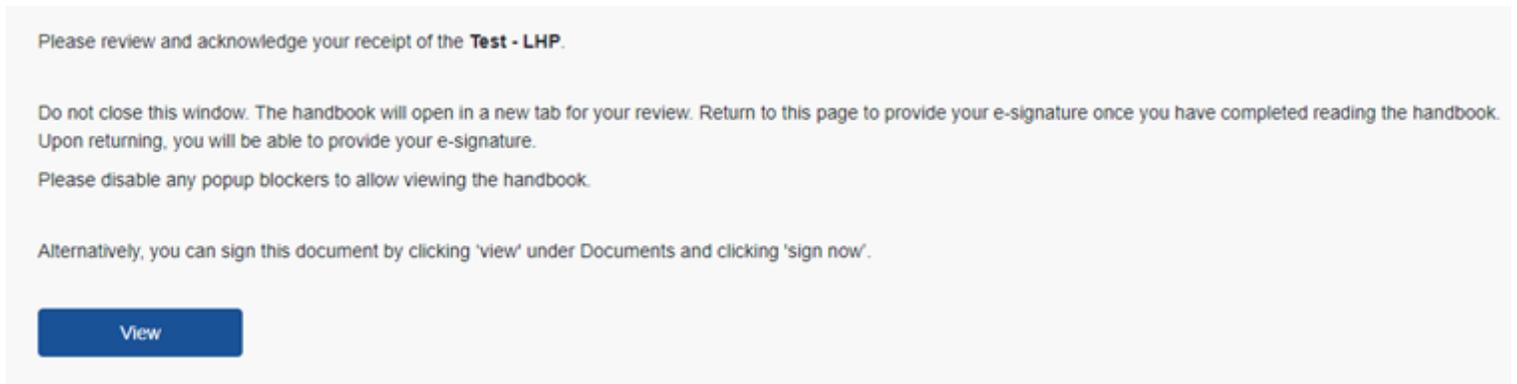
Sincerely,

**Sender Name**

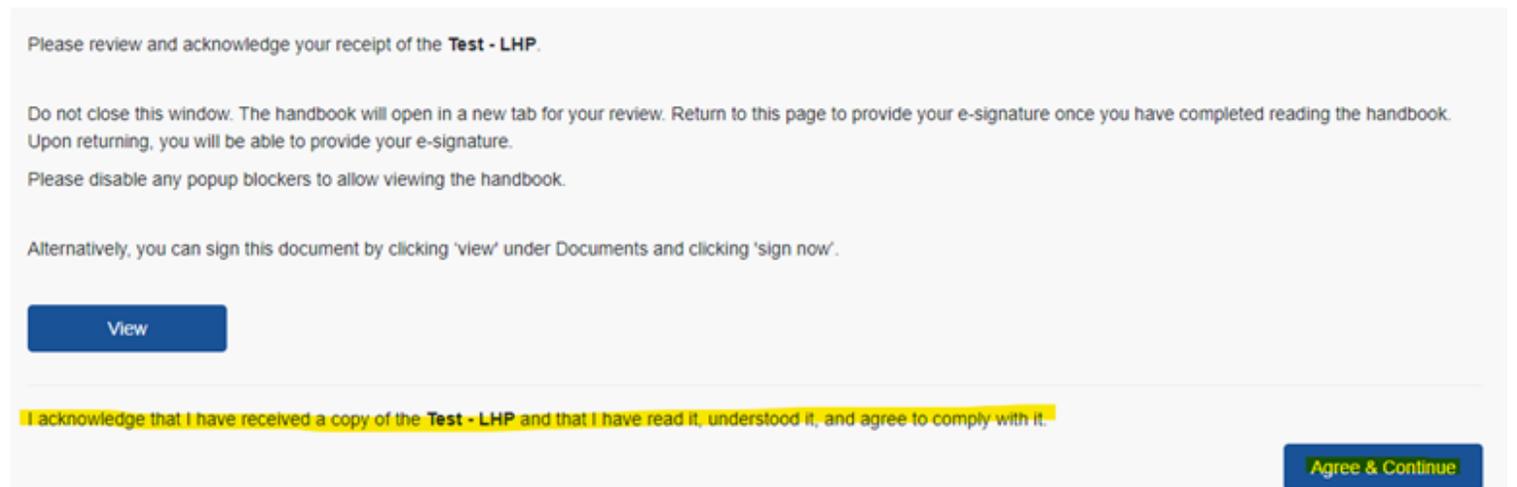
To prevent others from accessing your document, please do not forward this email.

# Employee Distribution

3. This email will either come from Kara (Kara@TurningPointHCM.com) or the contact at your company that you've requested.
4. This email will have all of the information that your employees will need to log in and electronically sign the document. Each time a new policy update is issued, they will receive this same email. If the employee has forgotten his/her login credentials, there is an option to create/reset your password right within the email.
5. When your employee uses any of the options in the email to get in to the system, they will see this screen:



6. Some things to note:
  - o This screen mentions to disable any popup blockers that may prevent the handbook opening as a PDF file. If your employees have trouble viewing the handbook, suggest this.
  - o When you click "View" the handbook will open in another window. Your employees should read through the handbook and the acknowledgement page. After they have read the handbook, they will click back into the original browser tab that allowed them to "View" the document and they will see a new option:



# Employee Distribution

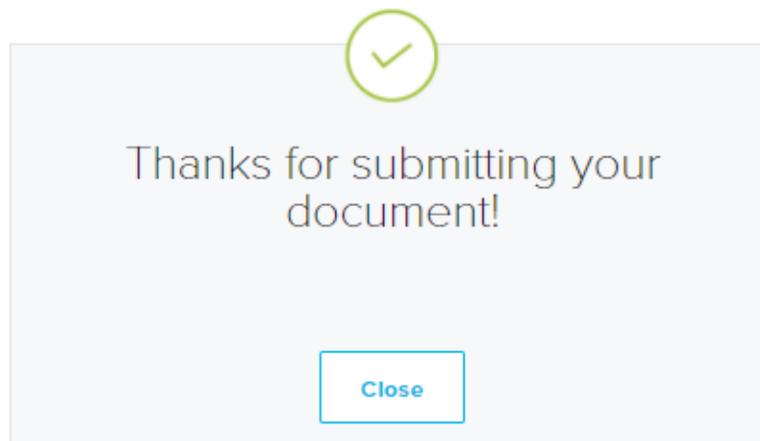
7. Click "Agree & Continue."

8. A new popup will appear which has the acknowledgement page with the option to e-sign and date the document.

9. At the bottom of the acknowledgement page the date will automatically populate and they will see the option to sign and print/type their name. When they click "Click to sign" they will have the option to sign the document with their mousepad, type out their name, or upload a photo of their signature. Any of these options are suitable.

<input type="button" value="Click to sign *"/>	01 / 19 / 2021
<hr/>	<hr/>
<b>Signature</b>	<b>Date</b>
<input type="text"/>	
<hr/>	
<b>Print Name</b>	

10. When they complete this section, they should click the "Continue" button at the top right corner of the popup screen. This will open a dialog for them to agree to the Terms and Conditions. They should then click "I agree" and they will see a confirmation screen:



# Tracking & Policy Updates



## Signature Tracking

- We can track who has signed and acknowledged the employee handbook and who has yet to do so.
- The system can send reminder emails to employees who have not yet e-signed.



## Policy Updates

This is a Living Handbook. As policies are changed and updated on the State and Federal levels, your HR Specialist will notify you. After all policy changes have been approved, we can re-send the handbook to the employees for acknowledgement of the updated policies. The process for e-signature is the same as the process for initial distribution.

