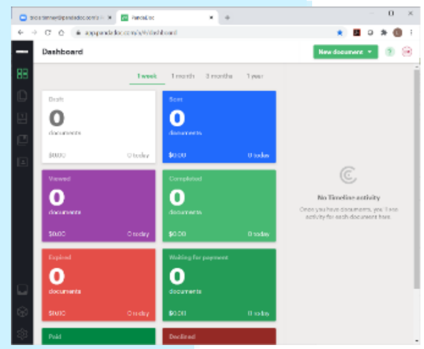
USING PANDA DOC

Panda Doc is a document creation and signature software program hosted on the web. You can create a document and send it to your customer. You also can view the status of the document from Sent, Viewed, and Signed, and provide content for your customer to use in their job search. Everything you and your customers do with a document is tracked and time stamped. Completed documents must be downloaded from Panda Doc and uploaded to DocuWare for storage.

Sign In



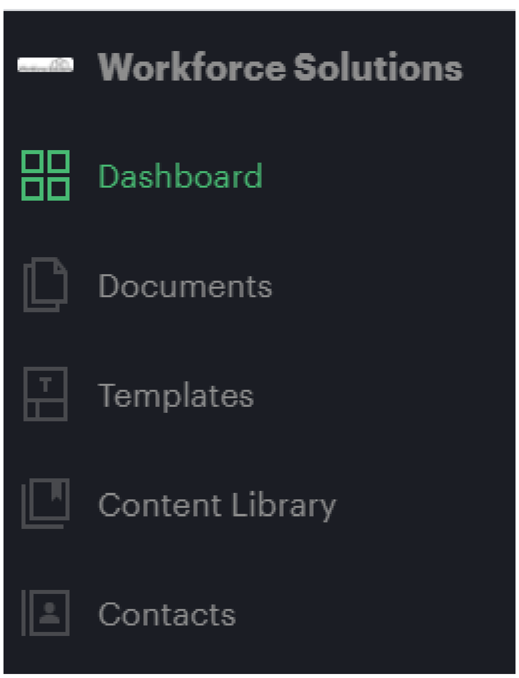
Your logon credentials are provided via email. When you receive the email, click the link to log in and create your profile. Your user name is your email address; you will be prompted to create a password.

Access Panda docs at pandadoc.com. Click Log In on the top right of the screen.

When you log in, your Dashboard displays.

Navigation

The left navigation bar displays at all times in collapsed mode. Use it to navigate through the software by clicking any of the icons.



The **Workforce Solutions** logo opens and closes the navigation bar.

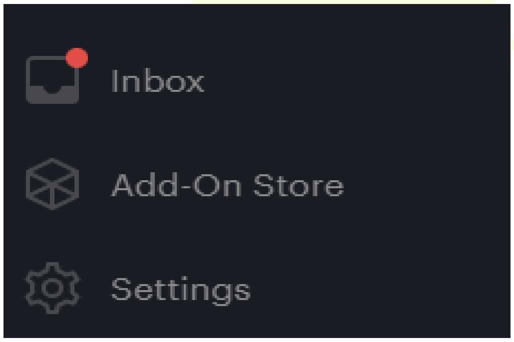
The **Dashboard** is the screen that displays when you log in. Here, you find folders that contain your documents and a timeline with a time stamp for each of your documents.

The **Documents** page lists your documents, shows the status, and allows you to filter documents so you can find the one you want.

The **Templates** page holds templates of all of Workforce Solutions documents that require a customer signature. Some templates contain all documents related to a specific event; for example, a Workforce Orientation.

Content Library is not used at this time.

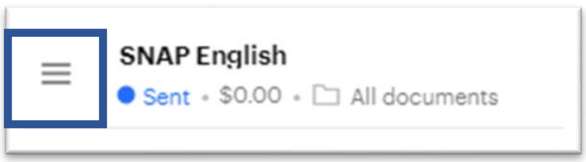
The **Contacts** page displays a list of all staff and customers in the Panda Doc system. Double click on a customer's name to view documents sent and the document status.



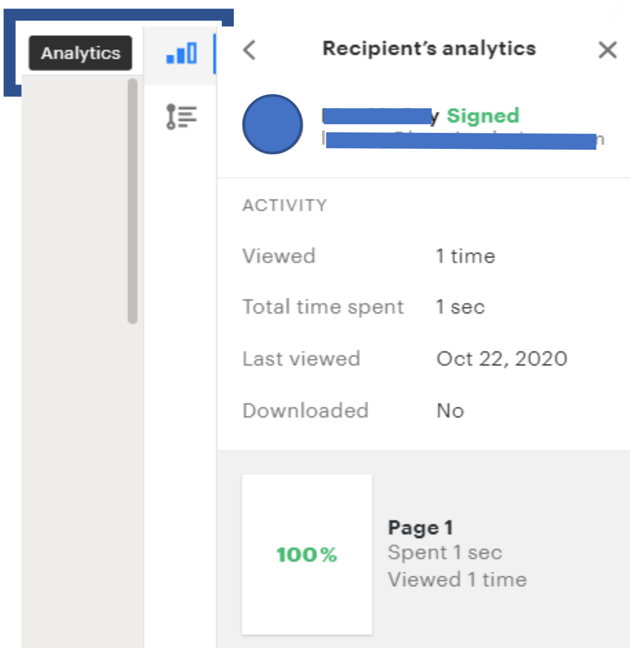
The **Inbox** holds messages about your documents and actions taken.

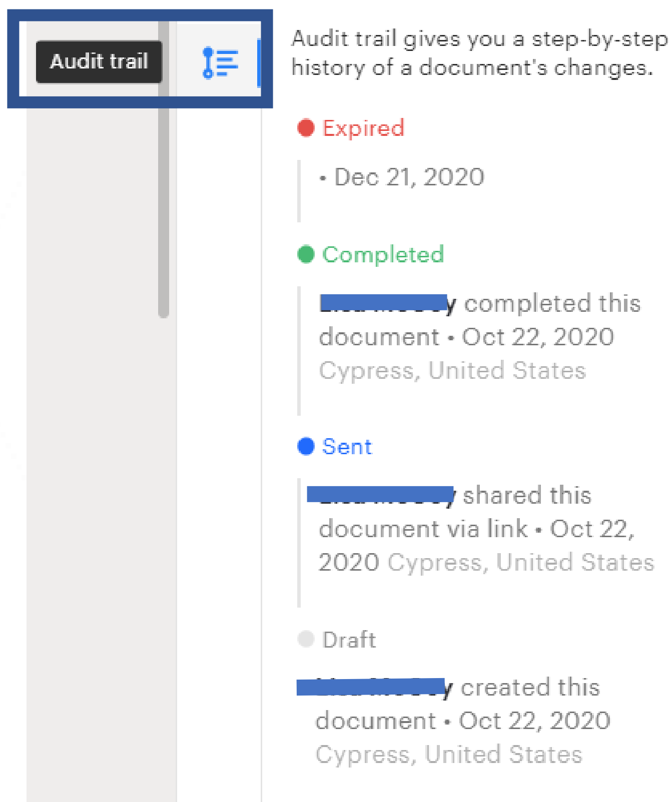
The **Add-On Store** is not used at this time.

The **Settings** page is where you can access your profile and saved messages.



Use the lined menu to return to the left navigation bar at any point within the system.

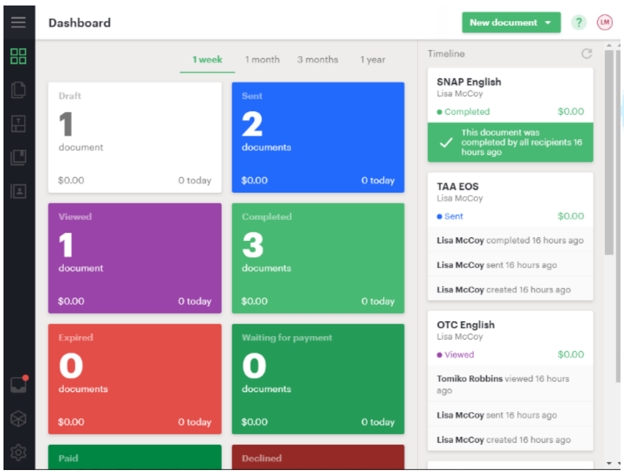




Dashboard

When you log in, your Dashboard displays.

The Dashboard displays folders that help you keep track of documents you have sent to customers and the status of the documents. It also displays a **timeline** on the right which shows recent activity related to documents.

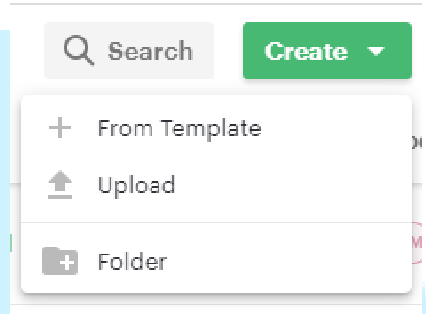


Draft	Documents currently being edited, but not yet sent to customers
Sent	Documents which have been sent to customers
Viewed	Documents which have been opened by at least one recipient
Completed	Documents which have been completed by all recipients
Expired	Documents which have passed their expiration Dates, 60 days, without being completed

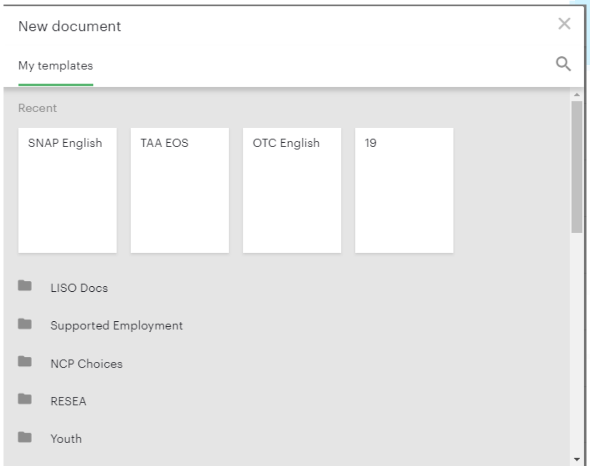
Create a Document

From the Documents page:

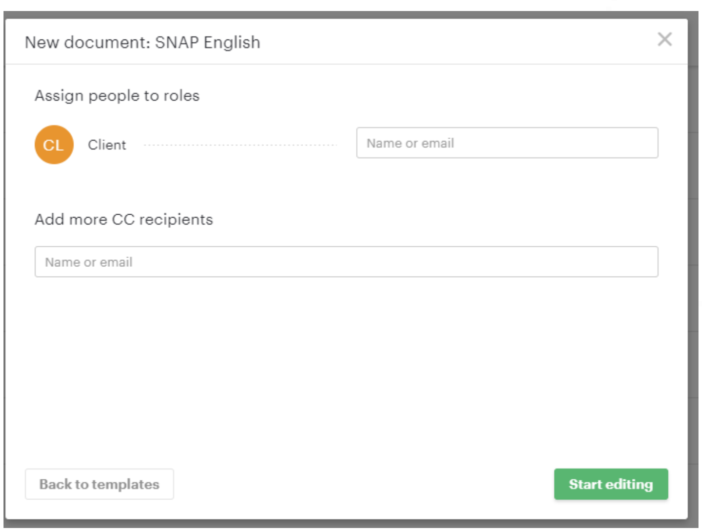
1. Click the “Create” button.



2. From the dropdown, select “+From Template.”
   The New document pop-up displays a list of recently documents used and template folders.



3. Select the document by clicking a recent document or selecting a folder from which to choose a document. The New document: *document name* pop-up displays.

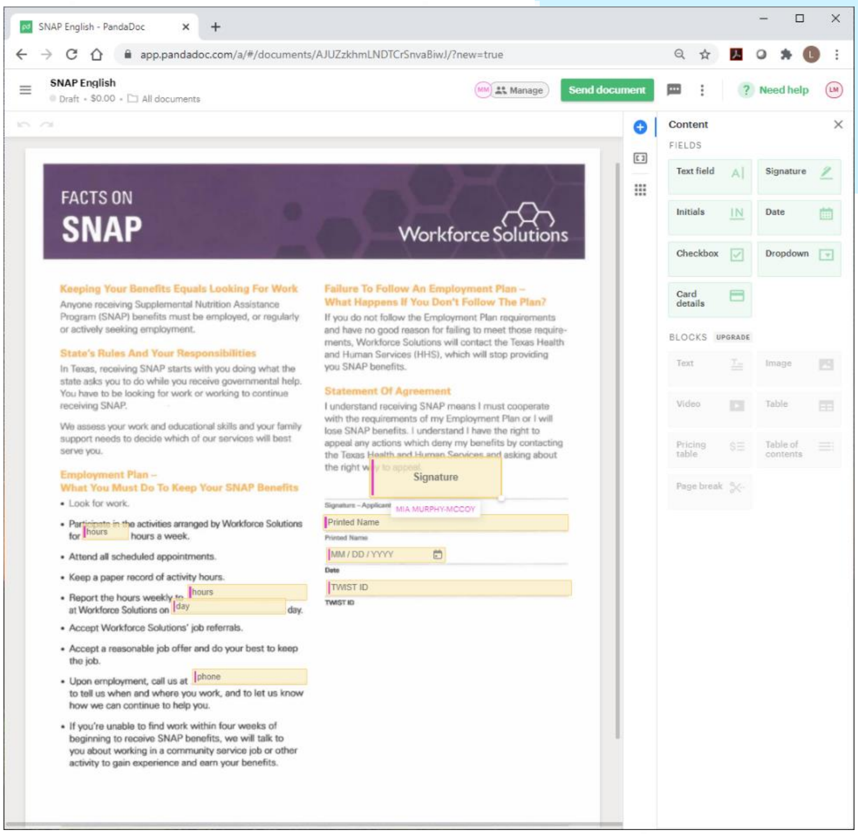


When you create a document using a template, you have to identify who is responsible for completing the specified fields in the document. In the document chosen here, SNAP English, only one person must complete and sign the form: the Client (customer). For Panda Doc to track the progress of the document, each field must be assigned to the responsible party, in this case, the customer.

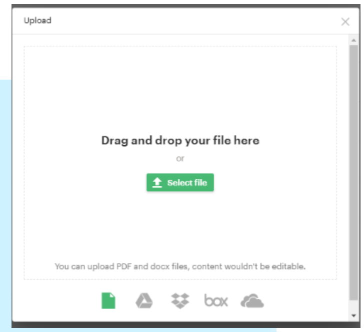
4. Select or add the customer's name and email in the 'Name or email' field. If the customer is not in the database:
   a. Select Add.
   b. Enter the customer's first name, last name, and email address.
   c. Click Add. You are returned to the New document: *document name* pop-up.

5. Add additional recipients, if needed.

6. Click "Start editing." The document template screen displays with fillable fields assigned to the customer designated on the previous screen. Hover your mouse over the field to see who is responsible for completing the field.

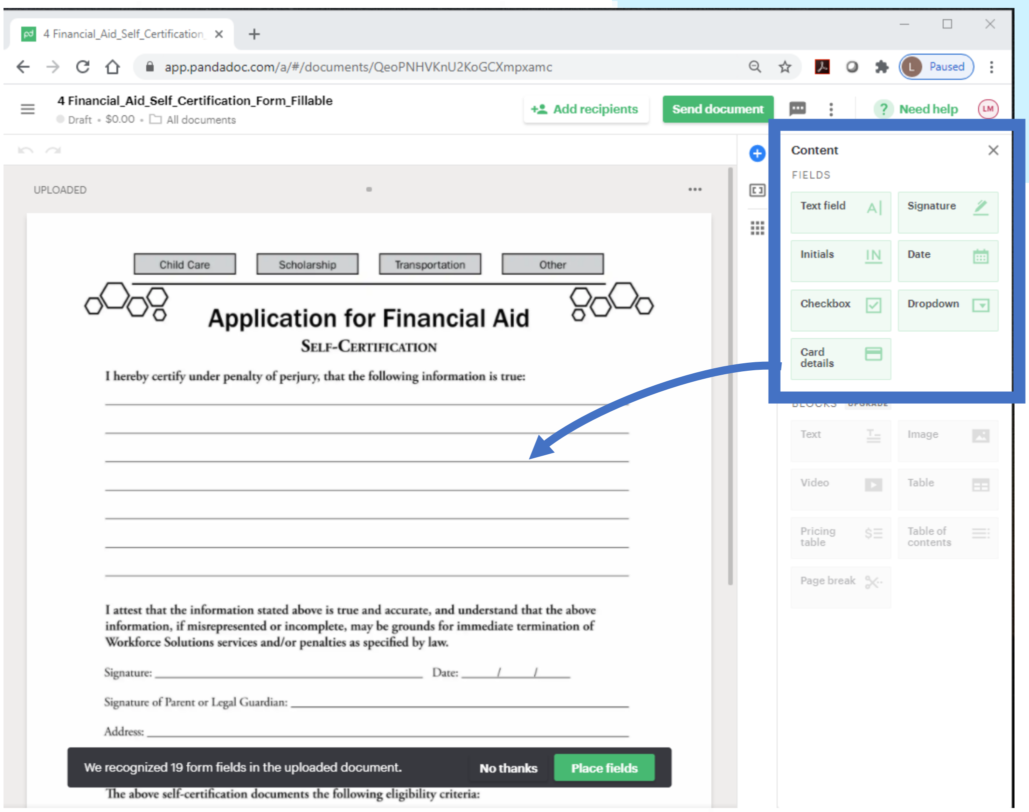


Upload a New Document



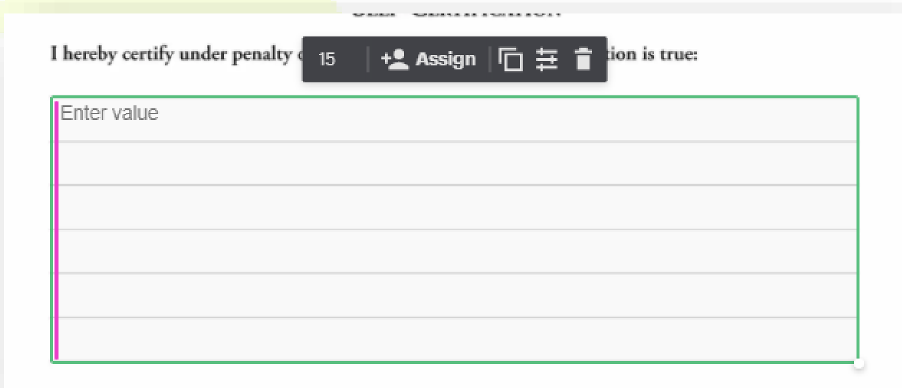
From the Documents page:

1. Click the “Create” button.
2. From the dropdown, select “Upload.” The Upload pop-up displays.
3. Select the document to upload from the options. The document displays on the document page.
4. Drag and drop the Content fields onto the document.



5. Click “Add recipients” to select or add the individual to assign the fields.
6. Click the field to assign. The field properties box displays.
7. Click ‘Assign.’
8. Click the individual you identified in step 5. The field is assigned to that individual to complete, indicated by a pink line on the left side.

9. Continue until all fields are assigned.



From the Templates Page:

1. Click on the folder that contains the document to create.

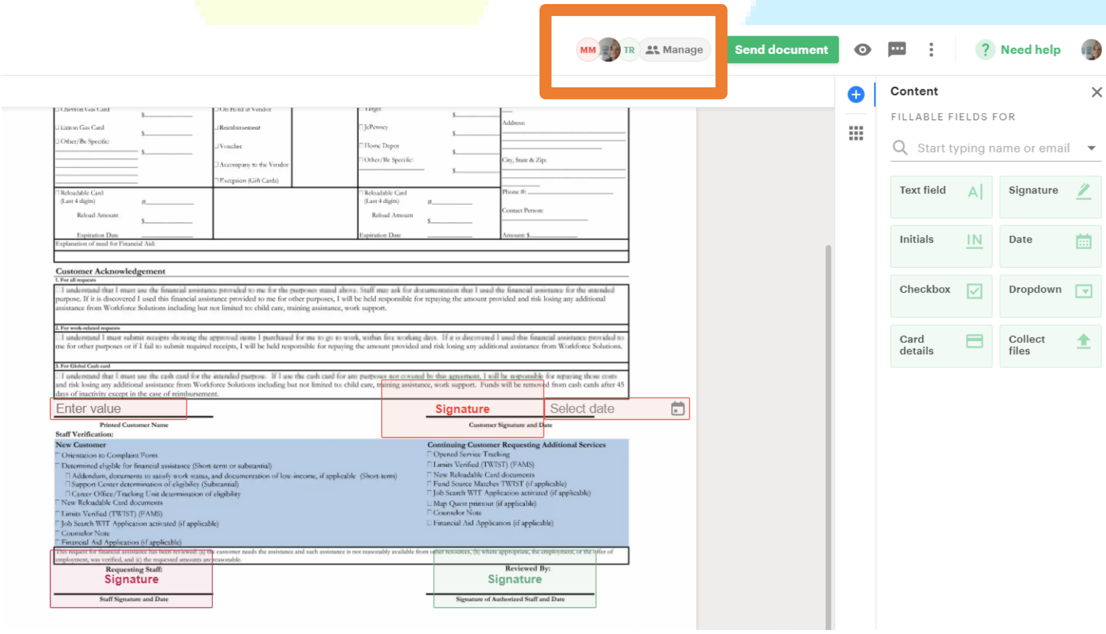
2. Click "Create Document" to the right of the document to create.

3. Follow steps 3-6 under "Create Document From the Documents Page."

Designate Signing Order

Once you have designated individual recipients you can set the order in which the document is signed.

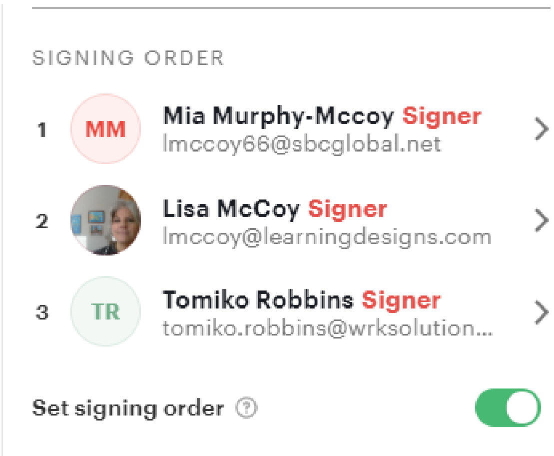
1. From the document screen, click Manage. The Recipients panel displays on the right navigation bar.



2. Move the toggle for **Set signing order** to green. Numbers display next to the recipients' names.

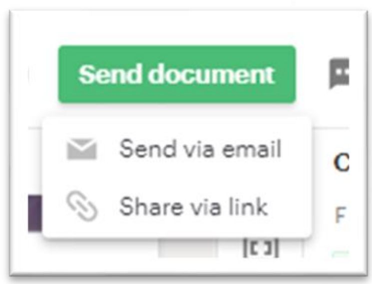
3. Hover your mouse over the number to show the grab tool.

4. Click and drag the recipients into the order they should sign the document.



Send a Document

You can send documents from many places within Panda Doc.



1. Click "Send document."

2. Select a method for sending the document from the dropdown. Note: Panda Doc will track progress for both options.

   If you select "Send via email:"
   a. Edit the document name, as needed.
   b. Click "Save and continue."

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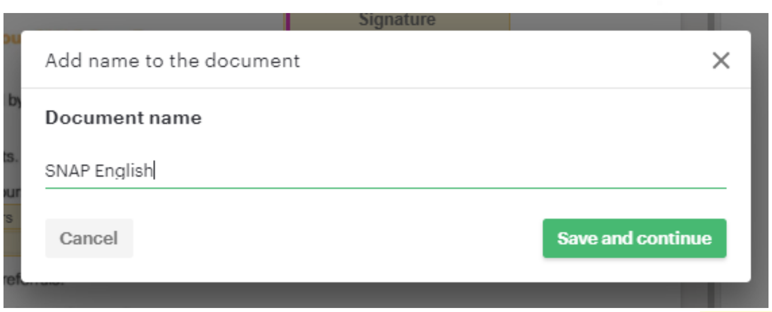
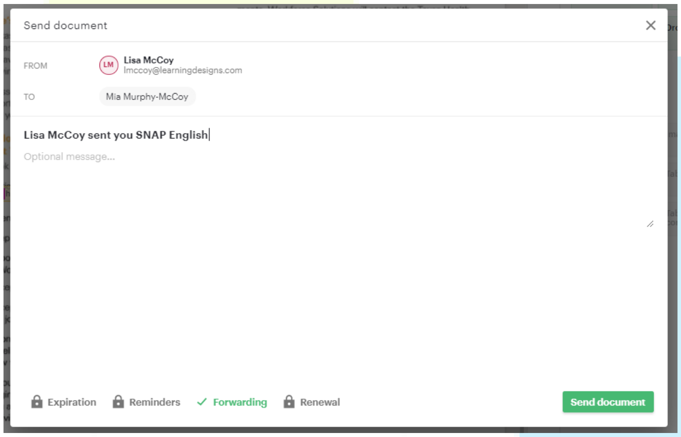
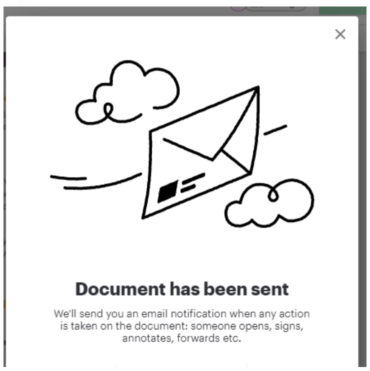


c. Complete the email message.

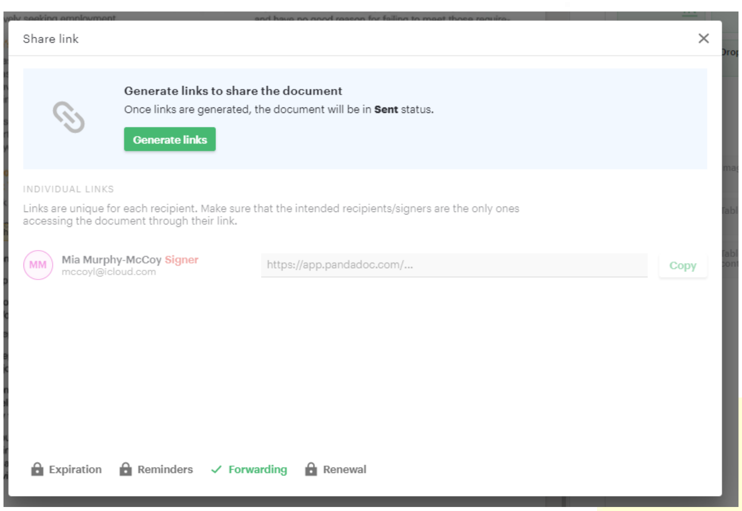


d. Click “Send document.” The sent document pop-up displays.

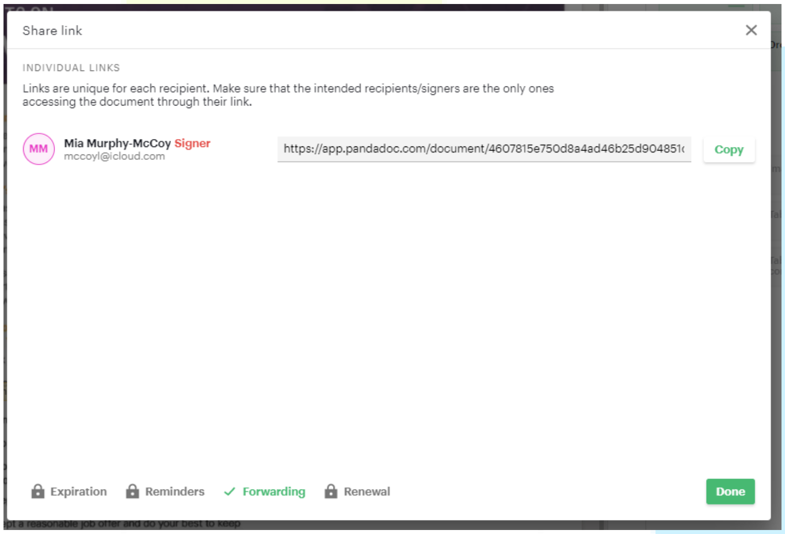


If you select “Share via Link:”

a. The “Share link” pop-up displays with the customer’s name.



b. Click “Generate links.” The “Individual links” pop-up displays.



c. Click “Done.” The document screen displays with the “Recipient’s analytics” displayed in the right tray.

View Documents and Status

You can view the documents you’ve sent and their status from:

- The Dashboard
  - Click the folders to see the documents at that stage.
  - View the timeline for recent documents and their current status.
- The Documents page
  - View a list of documents, their status, and when they were last touched.
- The Contacts page
  - Search for and select a customer to see all documents sent to that customer and the status and timeline of the document.

Download Document

Completed documents must be downloaded from Panda Doc and uploaded, with customer identifying information, into DocuWare for storage. To download a document:

1. Select the completed document you wish to download.

2. Click the "Download" button at the top of the screen. The file downloads and can be found in your computer's Downloads folder.

Create Your Digital Signature

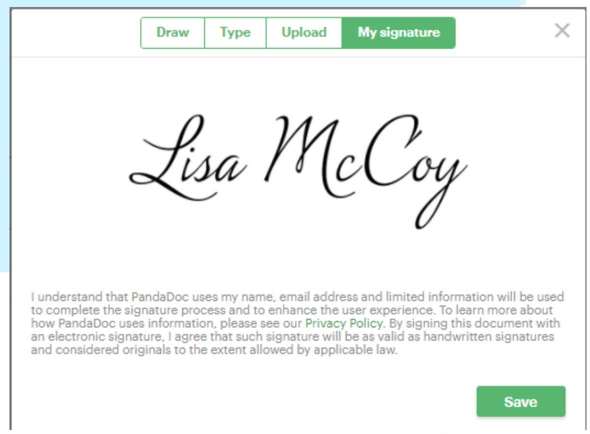
From the Settings page:

1. Click 'Create Signature.' The Signature pop-up displays.

2. Select the method you wish to use to create your signature.

3. Draw, type, or upload your signature.

4. Click 'Save.'



TEMPLATE FOLDER CONTENTS

• AEL - AEL Enrollment Form - AEL – ITEC Form - AEL – Self-Attestation Form • Child Care - I-9 - Orientation to Complaint – Spanish - OTC – English • Financial Aid - Attendance and Progress Report E - Blank Receipt of Supportive Services - Employment Income Verification - Financial Aid Application – E - Financial Aid Application -Spanish - Orientation to Complaint Spanish - OTC English - Self-Certification English - Self-Certification Spanish - Work Addendum English - Work Addendum Spanish • LISO Docs - Annual Required 090120 • Media Release - Workforce Solutions Media Release 07-05-2017 (8489) • NCP Choices - Authorization to Release Information • OJT - 2019 OJT Employer Eligibility Questionnaire - Gulf Coast OJT Agreement for Non=Registered Apprenticeship_2019 - Gulf Coast OJT Apprenticeship Agreement 2019 - Gulf Coast OJT Invoice Template - OJT Progress Report Template - OJT Training Plan Agreement ver2 - OJT Training Modification Form - Orientation to Complaint Spanish - OTC English - Temporary Worker Profile Schedule 2020 - Work Addendum English - Work Addendum Spanish	• RESEA - Back to Work Agreement • SNAP - Orientation to Complaint Spanish - OTC English - SNAP English - SNAP English copy - Work Addendum English - Work Addendum Spanish • Supported Employment. - Job Coach Pilot Referral Worksheet August 2020 • TAA - TAA Attendance and Progress Report E - TAA Employee Statement of Eligibility - TAA EOS - TAA Waiver of Training Form • TANF - Orientation to Complaint Spanish - OTC English - Work Addendum English - Work Addendum Spanish • Youth - 2020 Worksite Agreement updated 042019 - Information Release Form G&A

Using Panda Doc
Practice Suggestions

1. Create your digital signature.
2. Create a New Document from a template.
   a. Create a document from a template. Re-name it to begin with 'Test-.'
   b. Send the document you created in step 2a to your personal email.
   c. View the document you received.
   d. Refresh the Panda Doc page and notice what happens to your Viewed folder and your Sent folder.
   e. Sign the document you received. Refresh the Panda Doc page and notice what happens to your Viewed folder and your Completed folder.
   f. Download the completed document as a .pdf.
   g. View the certification of signature document attached to the downloaded .pdf.

3. Create a New Document from an imported document.
   a. Import a document from your computer. Re-name it to begin with 'Test-.'
   b. Add fillable fields.
   c. Send the document you created in Step #2 to your personal email.
   d. View the document you received.
   e. Refresh the Panda Doc page and notice what happens to your Viewed folder and your Sent folder.
   f. Sign the document you received. Refresh the Panda Doc page and notice what happens to your Viewed folder and your Completed folder.
   g. Download the completed document as a .pdf.
   h. View the certification of signature document attached to the downloaded .pdf.

4. Create a New Document which you must fill in before sending. (Use Facts on SNAP, or TANF.)
   a. Create a document from a template. Re-name it to begin with 'Test-.'
   b. Identify yourself as Staff, and create a name (pretend customer) using your personal email.
   c. Fill in the items for which you are responsible on the document.
   d. Send the document you created in Step #2 to your personal email (your pretend customer).
   e. View the document you received. Notice what happens on Panda Doc.
   f. Sign the document you received. Notice what happens in Panda Doc.
   g. Download the completed document as a .pdf.
   h. View the certification of signature document attached to the downloaded .pdf.