employment hero

Level up your template game with the Advanced Editor

Session FAQs

Global

Where do I find this feature?	You can find this by going to Compliance > Document Templates.
Can we add fields to the template that would allow employee to fill in information?	No, this would not be possible. Recipients are only able to sign a document.
How do I add my company logo to the document?	You will need to firstly have your logo uploaded to your Company Settings (recommended image file size is 267px x 267px) and then you will need to add the logo variable to your template. The variable will then pull the logo from your Company Settings.
Can I store more than one logo to my Company Settings?	This is not currently possible.
Can I insert a header or footer into the template?	We do not currently have a function to allow for this in the template builder tool.
Can I insert an image into the template?	This is not currently possible.
Can we insert page breaks into the document?	No, this is not possible as the templates are designed to be viewed electronically, and as such there are no page breaks.
Can we choose a different font?	Unfortunately this is not possible at this time.
I can see a tool for numbered lists or bullet points, but can I use a,b,c?	If you use the tool to create a numbered list and then right click you can change the properties and will be able to change the type to a,b,c instead.
Why is there a need to divide into sections?	Sections create breaks into the document to simplify formatting. You can choose not to use sections if you would prefer.
I have a couple of sections already set up and trying to add an extra section, but this is not allowing me. How do I resolve?	If you click on the eye icon in your tool bar, this will show you where all of your sections and blocks are. If you hover over the bottom of your last section you should see a red dashed line with a red arrow on the far right side - clicking on this will insert a new paragraph and allow you to add a new section.
I'm trying to create a block but I am getting an error "you can't create a block inside another block". How do I resolve this?	If you are trying to add an optional block right after a previous optional block, you can hover over the dashed line of your last option block (until the red dashed line shows) and click on the arrow to insert a new paragraph - this will then allow to insert an optional block just below the previous one. Another method would be to right click and you will have the ability to "remove block" which will then give you the ability to create a new block.

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What is the red return line?	This will allow you to enter a new paragraph, which may be useful if you are trying to add a new section or block.
Can we use the link to route the policy section in EH?	You would need to put the URL. Bear in mind that if the template is a contract that you are issuing at point of onboarding, they won't be able to view that section until they have signed the document.
Can you put a link in an optional box?	Yes, you can create an optional block and embed the link within the optional block.
Can I copy and paste a table from one part of my document to another?	If it is being moved within the same template, you should be able to highlight the table and copy and ctrl+v to paste it elsewhere in the template. Please note, that variables cannot be copied, however, so if your existing table contains variables, you will lose some information in this process. You may find it easier to create the table again in the spot that you would like it.
Can you copy paste a table from another document?	No, this would not be possible. Formatting does not copy across when pasting from another document into the template.
Why are blocks useful?	Optional blocks can be used to add text to your template that may apply but may sometimes not apply. This then allows you to remove that text when you are issuing the document to the employee if it does not apply. You may also sometimes have a variation of a clause and in that case, using block groups will allow to you to remove the variations that do not apply at point of issue.
Where do I find variables?	You can find your variables manager by clicking on the [T] icon in your toolbar.
Is it possible to add a date field that I can select manually, rather than pulling from information on the employee file?	Yes, you can create a custom variable for this. Open your variables manager up [T] and then click on the add button. You will need to select variable type "date" and enter a name for your variable. This should then allow you click on the variable when issuing a document and select the date you want to enter.
Can I create an Employee End date, as an auto populate?	You cannot create an auto-populate variable for this, but you could create a custom date variable and you will then be able to select the date at the point of issue.
Will the salary variable pro-rata the salary for a part time employee?	The salary variable will auto-populate that field as per the rate that is stored in the employee file. The variable would not make any pro-rata calculations.
Is it possible to have a field we can type text into when issuing the document i.e special conditions section?	Yes, you would create a custom variable with "string" type and this would allow you to enter free text at point of issue. Please note, that if you would have fields like this at different sections of your template, you would need a unique variable for each occasion.
Where you have sub numbering for the document e.g. 2.1 etc, how do we format the paragraph?	This is up to you; you can either have clause 2.1 sit directly under clause 2, or you can indent this if you prefer.

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What's the difference between a string and select variable?	A string variable would be used either as free text or to auto-populate from a field in the employee file, whereas a select variable would be used to create a list of options to choose from.
I want to be able to add a new string variable that allows lines of text, that may require a few paragraphs, that can be added to a single 'field'. At the moment the string variable removes all the carriage returns, so all the text that may have been correctly entered ends up as a single block of text.	The information entered for the variable will stay together (ie as one paragraph). You could potentially have Variable 1 on the first line and then Variable 2 on the second line. You may also want to consider if optional blocks may suit your needs better.
Is it normal that when you go to create a new variable, that not all fields are available yet? For example we have employees working in one location, but living in another location. If I add 'Employee Address City', it only carries over where they live, but I cannot find a variable for their working location	Not all fields in an employee file can be set to auto-populate. The variable for employee address will always pull their address. If you are wanting to pull a location, you would create a custom string variable with an auto-populate option for recipient_location.
What is the authorising signatory?	This is a user in your organisation who can set their signature and nominate other users to send documents on their behalf. Please click here to learn more.
Can we have more than one authorising signatory?	There can only be one authorising signatory per organisation.
Can I send a document on behalf of someone who is not the authorising signatory?	Yes, what will happen is that you will notice the signature box disappears and when you email the document, it will first send to the "sender" who will sign the document, and once the sender has signed, it will then email the recipient to notify them of the document.
Can we have a template that just requires the recipient to sign the document?	No, there is no signature logic for recipient only at present.
Can we have two people sign the document before it goes to the employee for them to sign?	Unfortunately not; the signature logic "Sender then Recipient" allows only for one sender and one recipient.
Can we make changes to the document once it has been issued?	You would need to re-issue the document in this instance.
If we update the template, would this update the document on the employee file?	No, as the document will be as per the template at the point of issue. If you edit the template and need to update the contract for the employee, this would need to be reissued.
Can you bulk issue templates that require the recipients signature?	Yes, if you have the platinum subscription, then you can use the bulk issue documents feature to issue templates that have been created using the advanced editor. This can be any template type but please note that this is a bulk issue feature and would mean that you can only edit in bulk and not individually. Please click here to learn more.

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Can you change the signature logic after the fact? That is you have an existing template that you want to use the content of but you want to get a return signature where normally it would only be used as a sender only.	If the template has been creating using the advanced editor, you can amend the template type which would effectively update the signature logic. You would do this by clicking on the actions button next to your template and selecting "edit info" and you will then be able to change the template type (template types that have "contract" in the name, or the template type titled "other HR document" follow Sender then Recipient signature logic). Remember if you change this, you will need to ensure you add a recipient signature pad onto the template, otherwise, the recipient will not be able to sign this. If this is a one off change, you may wish to consider cloning your template so that you have two variations (one template that is sender only and another that is sender then recipient).
I've sent a contract to my employee and it says waiting for recipient signature, but they cannot sign it - what would be causing this?	It is important to note that whilst the signature logic determines the path a document will follow (i.e. must be signed by sender and then recipient), it does not automatically provide the ability to sign the document - for this you need to ensure you have the electronic signature pads on the template. If you have an employee who cannot sign the document but it is showing as waiting for the recipient signature, this may indicate that the template does not have a signature pad for the recipient. You would need to review the template, add the signature pad and then re-issue the document to the employee.
Can I allocate someone who is not in our organisation to be the sender of the document?	No, this would not be possible. The sender needs to exist in your organisation so that they can long in and sign this electronically.
How can I tell if an employee has signed this?	If you go into the employee file and click on the HR Documents tab you will see the documents they have assigned and the status; if it is finalised you should be able to click into the document and see their signature on the document. You can also report on status of HR documents under Reports > Compliance Reports, if you want to track what documents are waiting on a recipient signature (this report also allows you to send reminders).
Can you re send the documents if the person claims they haven't received them?	Yes, if a document is still waiting on a recipients signature, and they have not received that email, you can go to Reports > Compliance Reports > HR Documents and next to the unfinalised document, you should see a "remind" button that will trigger the email to be re-sent.
Can we change the email that accompanies the contract?	At the point of issuing the document to the employee, you will see the email that will be sent and you can amend the email at that point.
What email does this notification get sent to?	It will be sent to the company email of the recipient if there is one in place. In the absence of a company email, it will be sent to the recipient's account email.
What if I need to issue a document but I do not want this to go to the employee yet?	A document is not sent to the employee until it is signed by the sender and you have selected to "email document". You can choose to issue a hard copy of the document which will leave the document in draft and allow you to print the document if you wish to take this to a meeting with the employee. You can then email the document to the employee afterwards if you wish to finalise this then.
What happens if you use the option to send hard copy rather than email document?	This will leave the document in draft and allow you to print a copy of the document.

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If you print a hard copy of the document, can you "force" EH to recognise that the document has been finalised?	No, this unfortunately not possible, as Employment Hero will only recognise it is finalised once it has been signed electronically. It would remain in draft in this scenario.
What is the verify document button that appears at the bottom of documents that are already signed?	The 'verify now' button is an additional security measure. Organisations can use this verify feature to prove that a document has not been tampered with and to verify the validity of the documents on our platform. Employees don't have to verify their documents, but can also do so after signing their contracts or acknowledging their policies.
Can you send two templates to an employee simultaneously?	This is not currently possible.
How would you attach / link to a position description without having it in the contract?	If you are issuing contracts at point of onboarding, you have the ability at that point to attach an accompanying document that will end up sitting under the employee's Uploaded Documents tab.
What if my position description also requires a signature?	If you require the position description to be signed by the employee, you would need to create a template for this also, with the correct signature logic.
Why would I need to bulk issue documents?	If you have employees that need to receive the same document, bulk issuing could save some time rather than sending to each individually. For example, perhaps you have 10 employees completing their probation and want to send a completion of probation letter.
Why can't I see all of my templates when I go to use the bulk issue documents feature?	The bulk issue documents feature will only work with templates created using the advanced editor. If you have some templates created using the basic editor (ie PDFs that you have uploaded into EH), these cannot be issued using the bulk issue documents feature.
Can all of Employment Hero's templates be cloned and edited?	Yes, the Employment Hero templates can be cloned, and you can edit the cloned copies.
Can you clone a basic template and then edit it like an advance template?	No, these templates are not built directly into Employment Hero and therefore cannot be copied.
If the employee chooses not to sign a document that we have issued to them, would this remain under their HR documents tab as unsigned?	Yes, this document would remain with status "waiting for recipient signature". You can delete this if you would prefer for it not to remain, but you may want to keep the record of it being sent. You may choose to add a management note to the employee file for transparency.
As HR compliance changes over time are you at Employment Hero keeping your standard templates up to current legal standard for AU and NZ? Are there notes to the changes that have been made?	The Employment Hero templates are updated and changed prior to any known changes, and as soon as we can when it's an unanticipated legislation amendment. There are articles for each region that highlight updates - please see these here.

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Do you have something similar for employment forms?	Employment Hero does not currently have functionality for forms.
If I send an employment contract via HR Docs, is there a way I can give my payroll team visibility over the contract?	If your payroll team are not admins in HR, you can create a security group for them to grant them access to Documents in your employees files. Please click here to learn more.
What happens if you want employees to sign policies? Is there some way to still house signed policies under the 'policies' tab, or will they have to be stored under HR docs?	Policies are not assigned to employees but rather employees are assigned to the policy. Policies, therefore, do not have a signature option, but when issuing a policy under Compliance > Policy Management you can set if the policy is mandatory and if it is, this will requires employees to acknowledge that they have read the policy and you can track this through a compliance report.
What is the difference between creating a template for a policy or uploading one under Policy Management? Which one should we be doing the policy from?	Policies will always be issued under Complaince > Policy Management. As there is typically no need for variables on a policy, you may find it easier to upload your policies under Policy Managment rather than creating templates. The reason there is the ability to create a template type for policies, is that Employment Hero has a number of policy templates built in to Employment Hero with that template type. You may like to clone these templates and edit them, in which case you would do this through Document Templates. When you wish to issue the policy, you would do so under Policy Management.