

Everyone you bring on, taken from hire to certificate

A structured seven-phase programme that carries a new employee, trainer, franchise partner, contractor or vendor from the day they are hired to the day they are certified – with the documents, training and signatures handled along the way.

Three people, three views

Everyone sees only what belongs to them. The system decides who can do what, so nobody completes a step that isn't theirs.

THE ORGANIZATION

Owner & recruiters

Runs hiring and owns the paperwork.

- Starts onboarding for anyone hired
- Uploads handbooks, policies and training videos
- Builds the forms people sign
- Issues the hiring agreement
- Assigns a training officer

THE TRAINER

Training officer

Guides one person through their training.

- Sees only their own trainees
- Messages them directly
- Approves the documents they submit
- Completes the organization's own steps
- Certifies the training at the end

THE NEW STARTER

Employee or partner

Works through their own programme.

- Reads documents and watches training
- Fills in and signs forms
- Uploads licences and paperwork
- Signs their hiring agreement
- Collects their certificate

How a hire moves through

The order matters – each step unlocks the next, and the final certificate cannot be issued until every one of them is genuinely complete.

1

ORGANIZATION

Someone is hired

An applicant is marked as hired, and their seven-phase programme opens automatically. Until that moment, a job seeker sees nothing – onboarding stays locked.

2

ORGANIZATION

A training officer is assigned

Chosen from your own team. They immediately get a dashboard listing this person, and their name is recorded as the trainer who will certify the work.

3

ORGANIZATION

The welcome email goes out

Branded with your logo and carrying the full onboarding schedule, the mentor's details and a link straight into their portal.

4

NEW STARTER

They work through the seven phases

Reading, watching, signing and uploading. Progress saves as they go and is visible to both the organization and their training officer in real time.

5

TRAINING OFFICER

Submissions are reviewed

Licences and certificates are approved or sent back with a reason. A rejected document tells the person exactly what to fix.

6

BOTH PARTIES

The agreement is signed

The organization issues it, the new starter reads it and signs on screen. They can also decline with a reason, which sends it back for amendment.



TRAINING OFFICER

Training is certified

Once every phase is finished, the officer signs off that the training genuinely happened. This is the last gate before a certificate exists.

The seven phases

Every phase holds tasks, documents to read, documents to submit, training videos and forms to sign. You attach your own material to each one.

PHASE		WHAT IT COVERS
1	Pre-Arrival Preparation	Welcome pack and schedule, mentor assignment, workspace, equipment and system access.
2	Day 1: Orientation	Personal welcome, facility tour, mission and values, policies, team introductions.
3	Training & Development	Electronic health record training, role-specific software, shadowing, continuing education.
4	Compliance & Certification	HIPAA training and attestation, licences and certifications, background consent.
5	Role-Specific Onboarding	Responsibilities, performance expectations, 30/60/90-day goals, career development.
6	Benefits & HR Policies	Benefits election, handbook, attendance, dress code and conduct. Becomes commercial terms and invoicing for contractors and vendors, and operating policies for franchise partners.
7	Ongoing Support	Follow-up reviews, feedback survey, wellbeing and work-life balance resources.

Build the programme once, reuse it

Upload a handbook or training video once to your shared library, then send it to a chosen phase for one person, everyone in a role, or everyone at once. Save a finished journey as a programme and future hires start from it automatically.

Five kinds of people you can onboard

Each gets a programme suited to them, and signs the legal instrument that actually applies – a vendor does not sign an employment contract.

Candidate / Employee**Employment Offer & Hiring Agreement**

The standard programme, including benefits enrolment and HR policies.

Trainer / Instructor**Training Services Agreement**

Adds train-the-trainer certification and teaching credential checks.

Franchise Owner**Franchise Partnership Agreement**

Adds the disclosure document, territory, royalties and operations manual. No employee benefits.

1099 Contractor**Independent Contractor Agreement**

Adds tax forms and insurance. Benefits are replaced by invoicing and payment terms.

Vendor / Supplier**Vendor & Supplier Services Agreement**

Adds service levels, supplier code of conduct and commercial terms.

The two documents

Both are generated in your organization's name, using the signatory, signature, logo and address you configure once. Nothing is generic.

The hiring agreement

Issued when you are ready. You can edit the particulars — start date, compensation, hours, notice period, territory, payment terms — and every clause, before sending it. The new starter reads it and signs on screen with their finger, trackpad or mouse. Their name, the time and their IP address are recorded with the signature.

The completion certificate

Issued only when three things are true: every phase is complete, the agreement has been signed, and the training officer has certified the training. It carries three signatures.

The new starter

Employee, partner or supplier

Signed when they accepted their agreement.

Your authorised signatory

On behalf of the organization

The name and signature you set up once.

The training officer

Certifying the training

Signs to confirm the training genuinely happened.

Legally executed, and auditable

Signatures are captured under the U.S. Electronic Signatures in Global and National Commerce Act. Every document carries a reference number and a tamper-evident hash, and every signature is logged with its timestamp and IP address in a searchable audit trail.

Setting up your organization

Four steps, done once. After that, onboarding someone takes about a minute.

1 Set your document identity

The name and job title of whoever signs on the organization's behalf, their signature — drawn on screen or uploaded — plus your logo and registered address. A live preview shows the agreement and certificate exactly as they will print.

2 Upload your material to the library

Employee handbook, HIPAA policy, benefits guide, orientation video. Once each, not once per person. Then send each item to the phase where it belongs.

3 Build the forms you need signed

Nine field types including dropdowns, dates and tick-boxes, each optional or required. You can also attach a fillable PDF for someone to complete and return.

4 Save it as a programme

Your finished journey becomes the default for that role, so everyone hired afterwards starts from it instead of a blank template.

What the system cannot supply

Your handbook, your policies, your training videos. The programme ships the structure — every task, every form, every slot — but the documents themselves have to be yours. Any slot with nothing attached is flagged to you and is not counted against the new starter's progress, so nobody is ever blocked by a file that was never uploaded.

Things worth knowing

QUESTION	ANSWER
Can one person onboard with two organizations?	Yes. They get a switcher, and each programme stays entirely separate.
Who can see uploaded licences and tax forms?	Only the organization and the assigned training officer. Files are stored privately and served through an authorised request, never a public link.
What if someone won't sign the agreement?	They can decline with a reason. The organization is notified and can amend and re-issue it.
Can training videos be uploaded, or only linked?	Either. Upload a video file, or paste a YouTube or Vimeo link, which is converted to a privacy-friendly embed.
Is there help for the new starter?	An assistant is built into the portal. It answers using their actual outstanding items rather than generic advice, and points them to their mentor when it doesn't know.
How are documents downloaded?	Both documents print to PDF from the browser, correctly paginated. A one-click PDF download can be added later.

Signal Career Compass – onboarding and documentation system.

Each organization on the platform manages its own people, documents and branding independently.