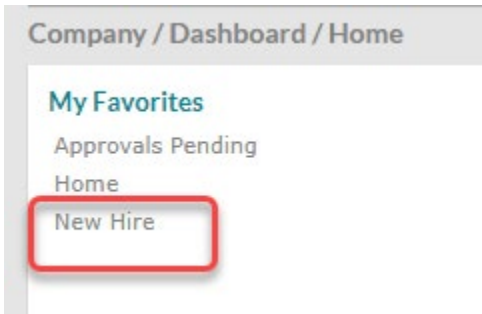




How to Enter a New Employee for Onboarding

1. Under your favorite's menu on your home screen, click on new hire



**Note that throughout the Onboarding software, you can use the down arrows to select from available options or if the item is BLUE & UNDERLINED, it will give you available selections when clicked on.

2. Click the hyper link that says, “**work location**” and select the location that you are hiring the employee to. The Employer ID will default automatically to what it should be. Enter the employee’s **social security number** and the hire type will always be “**Employee (W2)**”. Select “**this employee will be competing the onboarding process on the web.**”

HR / Action / New Hire Company

New Hire

Work Location MD

Employer ID

Social Security Number

Hire Type

Use Onboarding

- Enter personal info into the required **RED boxes ONLY**. Please enter the employee's personal email address. This is the address that will be used to initiate the electronic onboarding.

| Personal Information | | Resident Address | |
|-----------------------|----------------------|--------------------------|--|
| First Name | <input type="text"/> | Address Line One | <input type="text"/> |
| Last Name | <input type="text"/> | Address Line Two | <input type="text"/> |
| Middle Name | <input type="text"/> | ZIP Code | <input type="text"/> |
| Nickname | <input type="text"/> | GeoCode | -No Items- ▾ |
| Birth Date | <input type="text"/> | City | <input type="text"/> |
| Gender | --Select-- ▾ | State | <input type="text"/> |
| Ethnic Code | --Select-- ▾ | County | <input type="text"/> School District No. |
| Marital Status | -- Select -- ▾ | Home Phone | <input type="text"/> |
| Tobacco User | -- Select -- ▾ | Mobile Phone | <input type="text"/> |
| Handicapped | Not Selected ▾ | Personal Email Address | <input type="text"/> |
| Preferred Language | English ▾ | Work Email Address | <input type="text"/> |
| Veteran | Not Selected ▾ | | |
| Vietnam Veteran | Not Selected ▾ | Emergency Contact | |
| Disabled Veteran | Not Selected ▾ | Contact Name | <input type="text"/> |
| Service Medal Veteran | Not Selected ▾ | Contact Telephone | <input type="text"/> |

- Continue entering all information in the red boxes only. **Client start date** and **Employer start date** is the employee's hire date.

| Employment Details | |
|--------------------------|----------------------|
| Client Start Date | <input type="text"/> |
| Employer Start Date | <input type="text"/> |
| Position | <input type="text"/> |
| Employment Status | <input type="text"/> |
| Employment Type | <input type="text"/> |
| Benefit Group | <input type="text"/> |
| Retirement Benefit Group | <input type="text"/> |
| Division | <input type="text"/> |
| Department | <input type="text"/> |
| Shift | <input type="text"/> |
| Project | <input type="text"/> |
| Work Group | <input type="text"/> |
| Union Code | <input type="text"/> |
| Reports To | <input type="text"/> |
| Employee Number | <input type="text"/> |
| Benefits Thru Date | <input type="text"/> |
| New Hire Report Date | <input type="text"/> |
| Seniority Date | <input type="text"/> |
| Clock Number | <input type="text"/> |

5. Please enter the employee's pay information.

| Pay Details | |
|-----------------------------|--------------------------|
| Pay Group | <input type="text"/> |
| Pay Method | --Select-- ▾ |
| Pay Rate | <input type="text"/> |
| Pay Rate Basis | -- Select -- ▾ |
| Standard Hours | <input type="text"/> |
| Auto Time Sheet | <input type="checkbox"/> |
| Default Time Sheet Hours | <input type="text"/> |
| Benefits Calculation Salary | <input type="text"/> |

6. Click **Save**. Once you submit the new hire, the link will be sent to the employee. The first step for the employee to complete is their I9. Once they complete page 1, you will get an email to approve page 2 of the I9. You will also receive a notification on your home screen that you have a pending approval. There will be a red highlighted number over your check mark in the top right-hand corner of your home page. You can check all pending approvals by selecting approvals pending under your favorites as well.

