

Onboarding Quick Start Guide

Once you have hired a new employee, you will need to onboard them and send them an onboarding package. This guide will walk you through the fastest way of getting started.

Onboard New Employee

- 1) From the **Onboarding** menu, select Onboarding, and then select **Onboard New Employee**.
- 2) You can either select an existing template, or you may add documents manually in the section marked "Custom."
- 3) Complete the details for the new employee on these pages, selecting **Continue** at each page to proceed to the next.

Note that the required fields will be different depending on how the account is set up.

- 4) Select **Send Onboarding Docs**.

An **Onboarding Docs Sent Successfully** box opens confirming that the onboarding documents have been emailed to the new employee.

- 5) You can select **View Employees** to see the new hire, or **Onboard New Employee** if you wish to add another one.

The screenshot shows the 'ONBOARD NEW EMPLOYEE' sidebar with options: VIEW EMPLOYEES, MANAGE ONBOARDING, and REPORTS. The main area is titled 'Onboard New Employee' and 'Onboarding Documents'. It lists documents to include with checkboxes: Personal Information (unchecked), I-9 / Eligibility Verification Documents (checked), W-4 / Tax (checked), Form W-9 (unchecked), Payroll Information (checked), Offer Letter (unchecked with a link to 'Set up offer letter'), Work Opportunity Tax Credit (checked), Employee Handbook (unchecked with a link to 'Set up employee handbook'), and Equal Employment Opportunity (EEO) Information (unchecked). A 'Continue' button is at the bottom.

The screenshot shows the 'Onboard New Employee' form with the 'Personal Information' section. Fields include: First Name *, Last Name *, Email Address *, Employment Type * (dropdown), Employee Title *, Start Date * (calendar icon), Pay Type * (dropdown), and Pay Frequency * (dropdown). 'Back' and 'Continue' buttons are at the bottom.

Onboarding Docs Sent Successfully!



Onboarding documents have been emailed to John Smith!

You can track Test Test's progress in real time on your onboarding dashboard.

The following members will receive a notification when Test Test completes onboarding:

Admin

View Employee

Onboard New Employee