

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

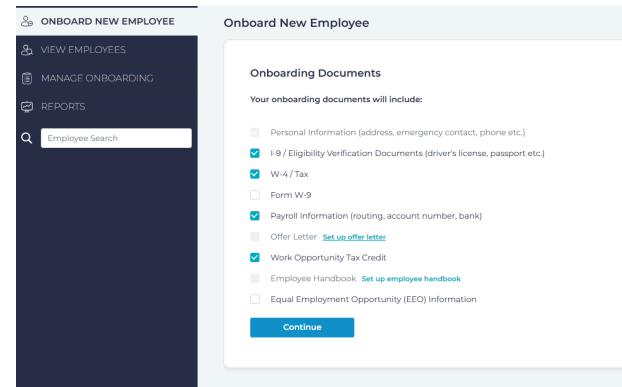
- 1) From the **Onboarding** menu, select Onboarding, and then select **Onboard New Employee**.
- 2) You can either select an existing template, or you may add documents manually in the section marked "Custom."
- 3) Complete the details for the new employee on these pages, selecting **Continue** at each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



ONBOARD NEW EMPLOYEE

VIEW EMPLOYEES

MANAGE ONBOARDING

REPORTS

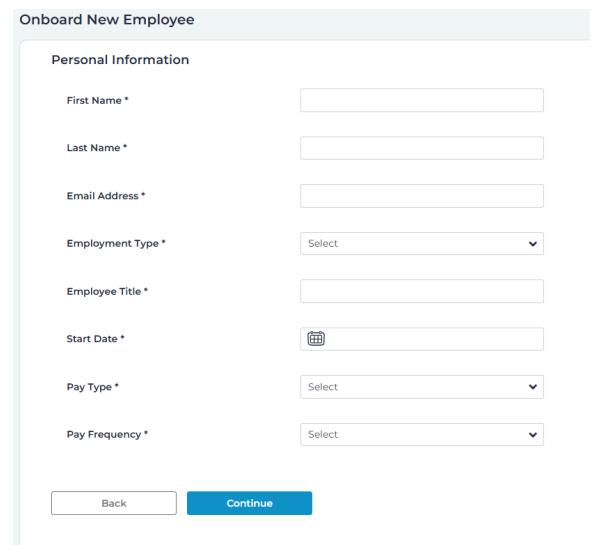
Employee Search

Onboarding Documents

Your onboarding documents will include:

Personal Information (address, emergency contact, phone etc.)
 I-9 / Eligibility Verification Documents (driver's license, passport etc.)
 W-4 / Tax
 Form W-9
 Payroll Information (routing, account number, bank)
 Offer Letter [Set up offer letter](#)
 Work Opportunity Tax Credit
 Employee Handbook [Set up employee handbook](#)
 Equal Employment Opportunity (EEO) Information

Continue



Onboard New Employee

Personal Information

First Name *

Last Name *

Email Address *

Employment Type *

Employee Title *

Start Date *

Pay Type *

Pay Frequency *

Back Continue

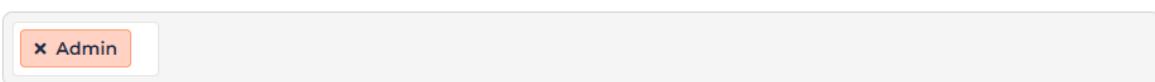
Onboarding Docs Sent Successfully!



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:



x Admin

View Employee

Onboard New Employee