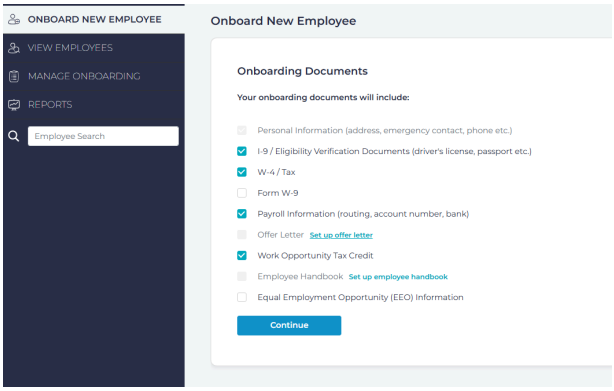
Onboarding Quick Start Guide

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

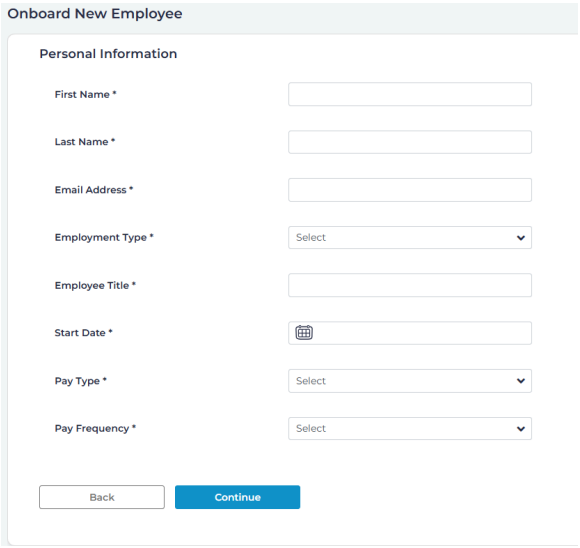


1) From the **Onboarding** menu, select Onboarding, and then select **Onboard New Employee**.

2) You can either select an existing template, or you may add documents manually in the section marked “Custom.”

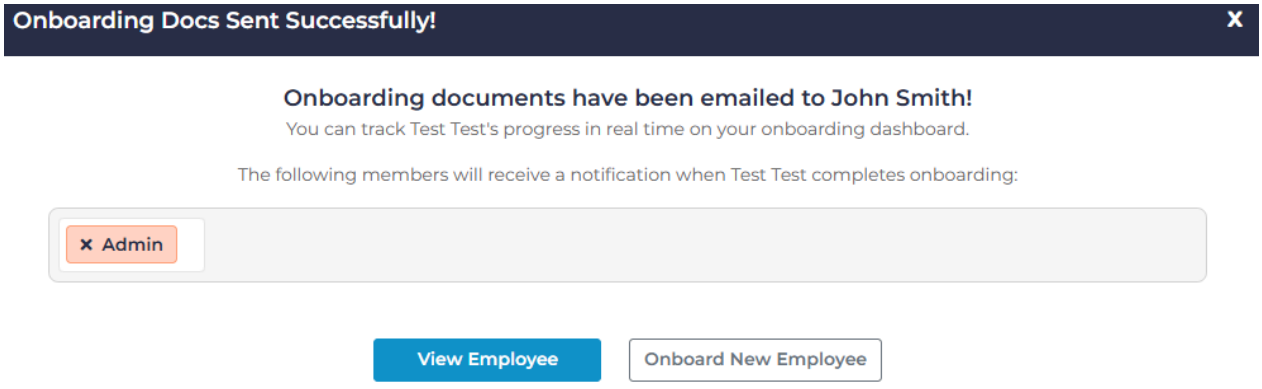
3) Complete the details for the new employee on these pages, selecting **Continue** at each page to proceed to the next.

   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.