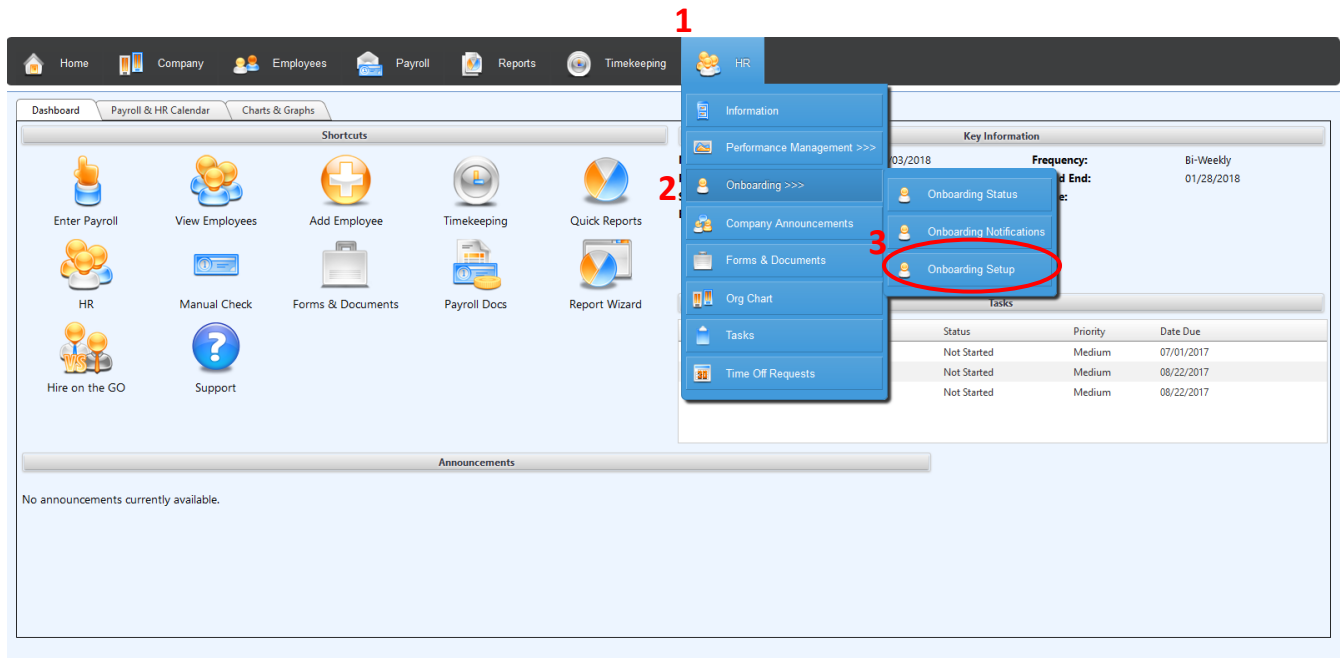


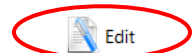
## Onboarding Set Up

1. Log into your Employer on the Go account
2. Go to the “HR” tab, then to “Onboarding” and click “Onboarding Set-Up”





3. Select “Edit” at the bottom of the screen to begin selecting preferences.

Add/Remove Steps	Required	Notification	Email
<input checked="" type="checkbox"/> Welcome	<input type="checkbox"/>	<input type="text"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Terms of Use	<input checked="" type="checkbox"/>	<input type="text"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Employee Info	<input checked="" type="checkbox"/>	<input type="text"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Direct Deposit	<input type="checkbox"/>	<input type="text"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Emergency Contacts	<input checked="" type="checkbox"/>	<input type="text"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Withholding	<input checked="" type="checkbox"/>	<input type="text"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> I9 Form	<input checked="" type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>
<input type="checkbox"/> Documents	<input type="checkbox"/>	<input type="text"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Confirmation	<input checked="" type="checkbox"/>	<input type="text"/>	<input checked="" type="checkbox"/>





4. The check marks to the left of the screen allow the employer to select items will be viewable during the onboarding process from the employee's side.

Add/Remove Steps			
	Required	Notification	Email
<input checked="" type="checkbox"/> Welcome	<input type="checkbox"/>	<input type="text"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Terms of Use	<input checked="" type="checkbox"/>	<input type="text"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Employee Info	<input checked="" type="checkbox"/>	<input type="text"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Direct Deposit	<input type="checkbox"/>	<input type="text"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Emergency Contacts	<input checked="" type="checkbox"/>	<input type="text"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Withholding	<input checked="" type="checkbox"/>	<input type="text"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> I9 Form	<input checked="" type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>
<input type="checkbox"/> Documents	<input type="checkbox"/>	<input type="text"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Confirmation	<input checked="" type="checkbox"/>	<input type="text"/>	<input checked="" type="checkbox"/>

 Save  Cancel



5. The "Required" is for which fields the employer wants to make mandatory for the employee to provide information for

Add/Remove Steps			
	Required	Notification	Email
<input checked="" type="checkbox"/> Welcome	<input type="checkbox"/>	<input type="text"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Terms of Use	<input checked="" type="checkbox"/>	<input type="text"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Employee Info	<input checked="" type="checkbox"/>	<input type="text"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Direct Deposit	<input type="checkbox"/>	<input type="text"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Emergency Contacts	<input checked="" type="checkbox"/>	<input type="text"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Withholding	<input checked="" type="checkbox"/>	<input type="text"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> I9 Form	<input checked="" type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>
<input type="checkbox"/> Documents	<input type="checkbox"/>	<input type="text"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Confirmation	<input checked="" type="checkbox"/>	<input type="text"/>	<input checked="" type="checkbox"/>

 Save  Cancel



6. If you would like to be notified via email when the employee completes a certain step, check off “Email” for the desired step. Then, enter the email in which the notification will be sent to under the “Notifications” list.

Add/Remove Steps			
	Required	2 Notification	1 Email
<input checked="" type="checkbox"/> Welcome	<input type="checkbox"/>	<input type="text"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Terms of Use	<input checked="" type="checkbox"/>	<input type="text"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Employee Info	<input checked="" type="checkbox"/>	<input type="text"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Direct Deposit	<input type="checkbox"/>	<input type="text"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Emergency Contacts	<input checked="" type="checkbox"/>	<input type="text"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Withholding	<input checked="" type="checkbox"/>	<input type="text"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> I9 Form	<input checked="" type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>
<input type="checkbox"/> Documents	<input type="checkbox"/>	<input type="text"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Confirmation	<input checked="" type="checkbox"/>	<input type="text"/>	<input checked="" type="checkbox"/>

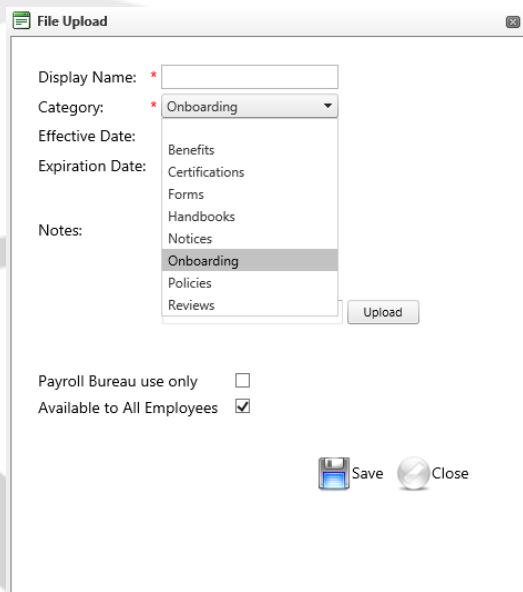
 Save  Cancel

7. Remember to click “Save” when you are finished selecting your preferences

Add/Remove Steps			
	Required	Notification	Email
<input checked="" type="checkbox"/> Welcome	<input type="checkbox"/>	<input type="text"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Terms of Use	<input checked="" type="checkbox"/>	<input type="text"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Employee Info	<input checked="" type="checkbox"/>	<input type="text"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Direct Deposit	<input type="checkbox"/>	<input type="text"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Emergency Contacts	<input checked="" type="checkbox"/>	<input type="text"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Withholding	<input checked="" type="checkbox"/>	<input type="text"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> I9 Form	<input checked="" type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>
<input type="checkbox"/> Documents	<input type="checkbox"/>	<input type="text"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Confirmation	<input checked="" type="checkbox"/>	<input type="text"/>	<input checked="" type="checkbox"/>

 Save 

8. If you would like to have document made viewable to employees during the onboarding process, go to the “Documents” tab, click on “Upload.” Fill in the information in the pop-up window and then click “Save.”



The image shows a 'File Upload' dialog box with the following fields and options:

- Display Name: \*
- Category: \* Onboarding (dropdown menu)
- Effective Date:
- Expiration Date:
- Notes:
- Payroll Bureau use only
- Available to All Employees
- Buttons: Save, Close, Upload

The dropdown menu for Category is open, showing the following options: Benefits, Certifications, Forms, Handbooks, Notices, Onboarding (highlighted), Policies, and Reviews.

9. You may also provide a specific welcome or confirmation message under the “Welcome Message” tab or the “Confirmation Message” tab. Remember to click “Edit” at the bottom and “Save” when you are completed.

