



Modern<sup>HR</sup>  
Perfecting the Art of Human Resources



# ONBOARDING QUICK GUIDE



# ONBOARDING

## INITIATE ONBOARDING

You'll find Initiate Onboarding under **EMPLOYEE MANAGEMENT** in the menu on the left of your screen, or you can use the search function at the top.

Here you are able to initiate the onboarding process for a new employee. Those fields marked with an asterisk (\*) must be completed.

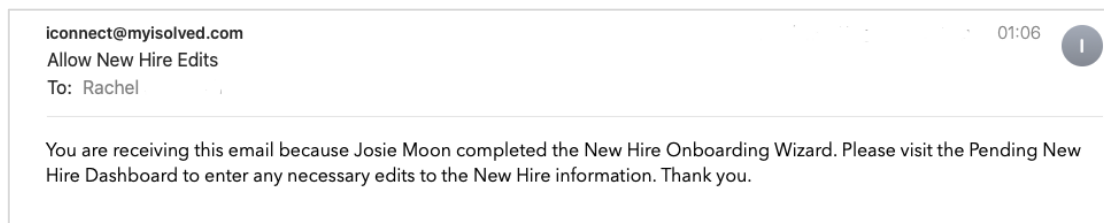
The critical field on this screen is **Email Address**. Once entered and saved, this triggers an email to the new hire which prompts them to complete their part of the onboarding process.

The screenshot shows the 'Initiate Onboarding' form in the iSolved HCM iConnect system. The left sidebar shows the 'EMPLOYEE MANAGEMENT' menu. The form has sections for 'Company Information', 'Onboarding Template', and 'New Hire Information'. Callouts provide additional context:

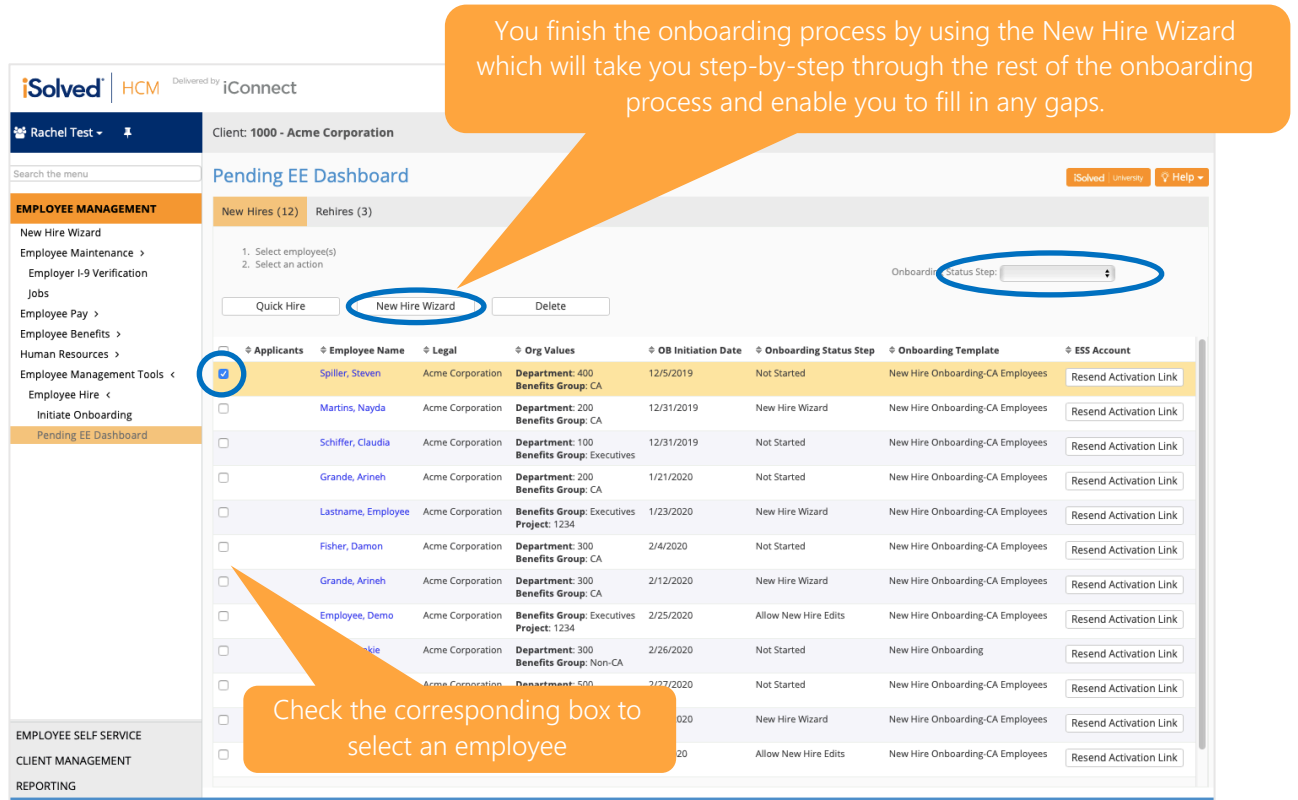
- Company Information:** A callout points to the 'Legal Company' dropdown, stating: 'If you have multiple companies they will appear in the drop down menu'.
- Onboarding Template:** A callout points to the 'Onboarding Template' dropdown, stating: 'Here you may have the option to choose an Onboarding Template. There may be different templates in the system depending on the employment classification (hourly vs salary), location etc. If you have different templates set up for your company, they will appear here.'
- New Hire Information:** A callout points to the 'Email Address' field, stating: 'Completing this field will trigger the email which prompts the new employee to complete the onboarding process'.
- Additional Fields:** A callout points to the 'Hire Date', 'Project', 'Department', 'Benefits Group', 'Division', 'hats', and 'Section' fields, stating: 'Whilst these fields are not mandatory, completing them will help you create a more comprehensive employee record. These fields can be completed later.'

**IMPORTANT:** When you're done, click on Save and the system will automatically send an email to the employee to begin their part of the onboarding process

When your new hire completes their side of the process you will receive emails notifying you:



To finish the onboarding process and add any missing data, select the relevant employee using the check box on the left of the screen. You can also search for records using the **Onboarding Status Step** field.



You are now ready to finish the onboarding process by completing the **I-9 Verification**.

## I-9 VERIFICATION

In the **I-9 Verification** section of **Employee Management** you are able to complete section 2 of the I-9, verifying the employee's eligibility to work in the United States.

You will be able to find the new employee by searching the master list of employees which appears in the **Employee Management** section of iConnect.

<div> <div>iSolved   HCM</div> <div>Delivered by iConnect</div> <div>Atlas</div> </div>												
<div> <div>Rachel Test</div> <div> <div>Company</div> <div>Acme Corporation</div> </div> <div> <div>Pay Group</div> <div>ALL</div> </div> <div> <div>Org Category</div> <div>ALL</div> </div> <div> <div>Value</div> <div></div> </div> <div> <div>Status</div> <div>Active</div> </div> <div> <div>Employee Type</div> <div>ALL</div> </div> <div> <div>Search</div> <div></div> </div> <div> <div>Apply</div> <div>Reset</div> </div> <div>Client: 1900 - Acme Corporation</div> </div>												
<div> <div>Search the menu</div> <div>Employee List</div> <div>Found 114 records</div> </div>												
<div> <div>EMPLOYEE MANAGEMENT</div> <div> <div>New Hire Wizard</div> <div>Employee Maintenance</div> <div>Employer I-9 Verification</div> <div>Jobs</div> <div>Employee Pay</div> <div>Employee Benefits</div> <div>Human Resources</div> <div>Employee Management Tools</div> </div> </div>												
Company	Pay Group	Employee #	First Name	Preferred Name	Middle Name	Last Name	SSN	Status	Project	Division	hats	Section
Acme Corporation	Semi	1277	Abe	A.B.		Apples	A		1234 - Project 1234	WEST - Division WEST	2 - hats 2	A - Section A
Acme Corporation	Semi	1286	Jenn			Babies	A		L19190 - Project L19190	WEST - Division WEST	2 - hats 2	B - Section B
Acme Corporation	Semi	0006	Christopher			Bailey	A		1234 - Project 1234			A - Section A
Acme Corporation	Semi	1293	Ana			Banana	A		L19190 - Project L19190	EAST - Division EAST	1 - hats 1	A - Section A
Acme Corporation	Semi	1260	John	JJ	A	Banfield	A		1234 - Project 1234			A - Section A
Acme Corporation	Semi	42	Joh	JJ	A	Banfield	A					
Acme Corporation	Semi	47	John	JJ	A	Banfield	A					
Acme Corporation	Semi	1291	Jon	JR	A	Banfield	A		1234 - Project 1234			A - Section A
Acme Corporation	Semi	1281	Adrienne			Barbot	A		1234567890 - 123456...	WEST - Division WEST	2 - hats 2	A - Section A
Acme Corporation	Semi	1297	Charles	Charlie		Barkley	A		L19190 - Project L19190	EAST - Division EAST	2 - hats 2	B - Section B
Acme Corporation	Weekly	1296	Troy			Barnes	A		1234 - Project 1234			B - Section B
Acme Corporation	Semi	1259	Mark			Beck	A		1234567890 - 123456...			A - Section A
Acme Corporation	Semi	0027	Justin			Benson	A					
Acme Corporation	Semi	61	Chandler			Bing	A		1234 - Project 1234	EAST - Division EAST	1 - hats 1	
Acme Corporation	Semi	0035	Caleb			Black	A		L19190 - Project L19190			A - Section A
Acme Corporation	Semi	69	Jason			Bourne	A		1234 - Project 1234			A - Section A
Acme Corporation	Weekly	1298	Kobe	Mamba		Bryant	A		1234 - Project 1234			A - Section A
Acme Corporation	Weekly	1265	ELSA			BUCKINGHAM	A		L19190 - Project L19190			A - Section A
Acme Corporation	Weekly	1267	BUGS			BUNNY	A		1234 - Project 1234			A - Section A
Acme Corporation	Semi	1268	Wayne			Campbell	A		1234 - Project 1234			A - Section A
Acme Corporation	Semi	1278	Ruth			Campos	A		L19190 - Project L19190	EAST - Division EAST	1 - hats 1	A - Section A
Acme Corporation	Weekly	jk	Bulma			Capsule Corp.	A					
Acme Corporation	Semi	1275	Virginia	Ginigin		Charleston	A		L19190 - Project L19190	WEST - Division WEST	2 - hats 2	B - Section B
Acme Corporation	Semi	1276	Cristina			Crawford	A		L19190 - Project L19190	WEST - Division WEST	1 - hats 1	B - Section B
Acme Corporation	Weekly	63	Tazmanian			Devine	A		1234 - Project 1234			A - Section A
Acme Corporation	Weekly	40	Griffin		Alexander	Dobson	A					

Search for your employee using the master search list and clicking on 'Apply'.  
Then select the employee which will bring up the following screen

Employer I-9 Verification

iSolved | University | Help

Verification

Reverification

Next

Certification

An electronic version of Section 1-Employee Information and Attestation of the form I-9 has been completed by the employee. You may complete Section 2-Employer or Authorized Representative Review and Verification by selecting the 'Continue with Section 2-Employer or Authorized Representative Review and Verification of form I-9' option below.

☐ Continue with data entry for informational purposes only.
 ☒ Continue to complete Section 2-Employer or Authorized Representative Review and Verification of form I-9.

Select **CONTINUE** to complete section 2-Employer or Authorized Representative Review and Verification of form I-9'.

Now you are able to choose which Lists and documents to use to complete the I-9 verification process:

**Employer I-9 Verification**

**Verification** | **Reverification**

**Verify and Save** | **Cancel**

**Employer or Authorized Representative Review and Verification**

Employee has electronically completed Section 1-Employee Information and Attestation. Click here for form I-9 instructions.

**Reverification**

There are no I-9 reverification records completed for this employee.

**I-9 Information**

☒ I-9 Completed

I-9 Completed Date: 3/10/2020

\* Citizenship: 1. A citizen of the United States

**List A Identity and Employment Authorization**

\* I-9 Document Title:

\* Issuing Authority:

\* Document Number:

Expiration Date (mm/dd/yyyy):

**List B Identity**

\* I-9 Document Title:

\* Issuing Authority:

Document Number:

Expiration Date (mm/dd/yyyy):

**List C Employment Authorization**

\* I-9 Document Title:

\* Issuing Authority:

Document Number:

Expiration Date (mm/dd/yyyy):

**Document Attachment**

Description:

Upload File:

**Certification**

I attest, under penalty of perjury, that (1) I have examined the document(s) presented by the above-named employee, (2) the above-listed document(s) appear to be genuine and to relate to the employee named, and (3) to the best of my knowledge the employee is authorized to work in the United States.

The employee's first day of employment (mm/dd/yyyy): 3/11/2020

Signature of Employer or Authorized Representative:

Today's Date (mm/dd/yyyy): 03/13/2020

Title of Employer or Authorized Representative:

Last Name of Employer or Authorized Representative: Test

First Name of Employer or Authorized Representative: Rachel

Employer's Business or Organization Name: Acme Corporation

Employer's Business or Organization Address (Street Number and Name): 1234 Main Street

Address Line 2:

City or Town: Fairview Park

State: OH

ZIP Code: 44126

The **Reverification** is only for special circumstances relating to non-US citizen work permit changes and residency status changes. Check with your HR Account Manager for circumstances when reverification is necessary.

Finally, an attestation will pop up on your screen. Click **Acknowledge** and you're done!

I acknowledge that I have read and understand the following attestation statement: **I attest, under penalty of perjury, that to the best of my knowledge, the employee is authorized to work in the United States, and if the employee presented document(s), the document(s) I have examined appear to be genuine and to relate to the individual.**

**Acknowledge** **Cancel**