



# 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.

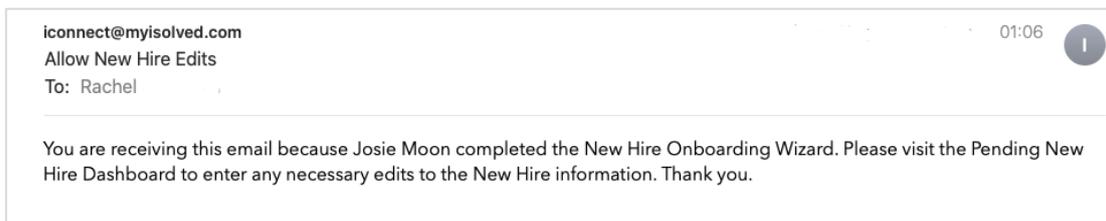
Here you are able to initiate the onboarding process for a new employee. Those fields marked with an asterisk (\*) must be completed.

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 system. The form is divided into several sections: 'Company Information', 'Onboarding Template', and 'New Hire Information'. The 'Company Information' section includes 'Legal Company' (Acme Corporation) and '\* Work Location'. The 'Onboarding Template' section includes '\* Onboarding Template'. The 'New Hire Information' section includes '\* First Name', 'Middle Name', '\* Last Name', and '\* Email Address'. Below the email address field, there are two bullet points: 'If email address is not currently active the email address will be blocked and the EE will not receive the activation link.' and 'The initial email address entered here will default to the Self-Service Email field but can be manually changed to a work email address upon hire.' Below the email address field, there are several dropdown menus: 'Hire Date', 'Project', 'Department', 'Benefits Group', 'Division', 'hats', and 'Section'. The 'Email Address' field is highlighted with an orange callout box that says 'Completing this field will trigger the email which prompts the new employee to complete the onboarding process'. The 'Legal Company' dropdown is highlighted with an orange callout box that says 'If you have multiple companies they will appear in the drop down menu'. The 'Onboarding Template' dropdown is highlighted with an orange callout box that says '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.' The 'Hire Date' dropdown is highlighted with an orange callout box that says '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 review and process your new hires go to **Pending EE Dashboard** which is just below **Initiate Onboarding** on the menu.

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.

The screenshot shows the 'Pending EE Dashboard' for 'Client: 1000 - Acme Corporation'. The dashboard includes a navigation menu on the left with 'EMPLOYEE MANAGEMENT' and 'EMPLOYEE SELF-SERVICE' sections. The main content area shows a list of new hires with columns for Applicants, Employee Name, Legal, Org Values, OB Initiation Date, Onboarding Status Step, Onboarding Template, and ESS Account. A 'New Hire Wizard' button is highlighted with a blue circle. A callout box points to the 'New Hire Wizard' button, stating: 'You finish the onboarding process by using the New Hire Wizard which will take you step-by-step through the rest of the onboarding process and enable you to fill in any gaps.' Another callout box points to a checkbox in the 'Applicants' column, stating: 'Check the corresponding box to select an employee'. A third callout box points to the 'Onboarding Status Step' dropdown menu, which is also circled in blue.

Applicants	Employee Name	Legal	Org Values	OB Initiation Date	Onboarding Status Step	Onboarding Template	ESS Account
<input checked="" type="checkbox"/>	Spiller, Steven	Acme Corporation	Department: 400 Benefits Group: CA	12/5/2019	Not Started	New Hire Onboarding-CA Employees	Resend Activation Link
<input type="checkbox"/>	Martins, Nayda	Acme Corporation	Department: 200 Benefits Group: CA	12/31/2019	New Hire Wizard	New Hire Onboarding-CA Employees	Resend Activation Link
<input type="checkbox"/>	Schiffer, Claudia	Acme Corporation	Department: 100 Benefits Group: Executives	12/31/2019	Not Started	New Hire Onboarding-CA Employees	Resend Activation Link
<input type="checkbox"/>	Grande, Arineh	Acme Corporation	Department: 200 Benefits Group: CA	1/21/2020	Not Started	New Hire Onboarding-CA Employees	Resend Activation Link
<input type="checkbox"/>	Lastname, Employee	Acme Corporation	Benefits Group: Executives Project: 1234	1/23/2020	New Hire Wizard	New Hire Onboarding-CA Employees	Resend Activation Link
<input type="checkbox"/>	Fisher, Damon	Acme Corporation	Department: 300 Benefits Group: CA	2/4/2020	Not Started	New Hire Onboarding-CA Employees	Resend Activation Link
<input type="checkbox"/>	Grande, Arineh	Acme Corporation	Department: 300 Benefits Group: CA	2/12/2020	New Hire Wizard	New Hire Onboarding-CA Employees	Resend Activation Link
<input type="checkbox"/>	Employee, Demo	Acme Corporation	Benefits Group: Executives Project: 1234	2/25/2020	Allow New Hire Edits	New Hire Onboarding-CA Employees	Resend Activation Link
<input type="checkbox"/>		Acme Corporation	Department: 300 Benefits Group: Non-CA	2/26/2020	Not Started	New Hire Onboarding	Resend Activation Link
<input type="checkbox"/>		Acme Corporation	Department: 500	2/27/2020	Not Started	New Hire Onboarding-CA Employees	Resend Activation Link
<input type="checkbox"/>				020	New Hire Wizard	New Hire Onboarding-CA Employees	Resend Activation Link
<input type="checkbox"/>				020	Allow New Hire Edits	New Hire Onboarding-CA Employees	Resend Activation Link

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.

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				A - Section A
Acme Corporation	Semi	47	John	JJ	A	Banfield		A				A - Section 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				A - Section A
Acme Corporation	Semi	61	Chandler			Bing		A	1234 - Project 1234	EAST - Division EAST	1 - hats 1	A - Section A
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				A - Section 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				A - Section 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

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:

The screen will already be in entry mode, so no need to click 'Edit'. Click Save when you have finished

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