Overview

The Onboarding Product is designed to help organize the 'paperwork' collected during an Offer/New Hire process. Onboarding comes with a number of Objects to help organize at a more granular level.

Expected Process Flow

The Onboarding process begins from the AMS Offer Record. A number of Fields on the Offer Record, found below, will be set to system generate an Employee File Record. The Employee File Record will generate and pull over a number of data points from the Offer Record to populate Employee File Fields.

- *Approval Status = Approved*
- *Offer Status* = Accepted
- *Employee Type* = Populated with a value
- *Generate Employee File* = True (Checked)

The generation of the remaining Onboarding Objects is normally completed through the use of the Forms product. A Form is created for each Object and then connected together with a Forms Set. The Form Set URL will be captured in an Email Template which will be emailed to the Employee. When the Form Set is submitted, the Object Records will be created with the Employee's data points.

*Tip: Jobscience has generic Forms available for you out of the box. However, you can determine what questions are presented to the New Hire for collection. This customization would also be possible via the creation of new Fields and/or Forms.

Each Record has a *Review Status* Field. This Field determines if the content has been reviewed by an HR Representative to Onboard the individual into the HRIS applications. *Review Status* defaults to Submitted value when a Record is created. A HR Representative will manually update the file to Problem or Complete as appropriate after reviewing the collected information. Complete would be the desired end result of all Onboarding Objects.

On the Employee File Record, you'll be able to see the *Review Status* of each Onboarding Record within the Traffic Light section.

- New states a Record has not been created for the Contact.
- Yellow states the Record has been submitted and ready for review by HR.
- Red states there is a problem with the Record and it needs to be corrected, likely by the New Hire Employee.
- Green states the HR review has been completed and contained acceptable & correct data points.

By clicking on the Traffic Light, a new Tab will open in your browser and display the associating Record for that Object. This allows for an easier access point for an HR User to review the submitted information.

Employee File

This Object will collect Job related details regarding the accepted position.

*Tip: Some data points will auto populate when created from an AMS Offer Record.

Recommended Fields include:

Field Name	Purpose
Employee Name	Captures the Employee that the data is related to (or about)
Preferred Name	Captures the desired name
Birth Date	Captures the Birthday
Employee Status	Tracks the Hire Status
Criminal Background Check OK	Tracks the status of the Background Check
Medical Screen OK	Tracks the status of the Medical Check
Drug Screen OK	Tracks the status of the Drug Test
Type of Credential	Captures which Credential is needed
Credential Number	Captures the Credential Number
License Required	Tracks if a License is needed
License Number	Captures the License Number

License Verified	Tracks if the License has been verified
Current License Status	Tracks if the License is valid for use
Position Title	Captures the Title of the Role
Employee Type	Tracks how the Employee will be paid for work completed
FTE	Captures the headcount assigned for this Role
Location	Determines where the Role will be worked from
Employee Worker's Comp State	Tracks which State will be used for Worker's Comp claims
Department	Tracks which Department/Team the Role is working under
Competencies	Captures which Skills are required for the Role's success
Direct Supervisor	Determines who the Supervisor is
Assigned Mentor	Determines who the Employee will shadow
Start Date	Tracks when the Employee starts work
Orientation Lead	Captures who is responsible for Orientation
Work Schedule	Captures the expected schedule for working hours
Shift	Captures the expected Shift for working hours
Pay Grade	Tracks the Pay Range of the Job
Pay Schedule	Tracks how often payroll will be paid / processed
HRS Per Pay Period	Captures how many hours are paid in a Pay Cycle
Clock Number	Tracks the Swipe Card used for entering hours worked
Moving Expenses	Determines if moving Expenses will be paid
Employee ID	Captures the ID of the Employee
ID Badge Photo Taken	Tracks if a headshot was taken
ID Badge Issued	Tracks if the Employee ID was assigned
Office	Tracks which Office Building the Employee will work from
Cubicle	Tracks which Cubicle the Employee will work in
Requires Parking	Tracks if a Parking Spot is needed
Parking Slot or Pass ID	Captures the Parking Spot details
Corporate Email Address	Captures the address assigned for an email account

Corporate Phone	Captures the phone number assigned for an Office Phone
Corporate Mobile Phone	Captures the phone number assigned for a Cell Phone
Review Status	Tracks if the data has been reviewed by HR

Create New Employee File

Follow these steps to manually create an Employee File:

1. Find the desired Contact Record
2. Scroll to the Employee File Related List
3. Click the **New** button
4. Populate the desired Fields, using consideration for the above mentioned Fields
5. Click the **Save** button when satisfied

Modify Existing Employee File

1. Find the desired Employee File Record

Tip: Likely from the Contact Record Related List but could use the Employee File Tab

2. Click the **Edit** button
3. Populate the desired Fields, using consideration for the above mentioned Fields
4. Click the **Save** button when satisfied

Consents

This Object is generally where company policies and HR practices are acknowledged by the Employee New Hire.

Recommended Fields include:

Field Name	Purpose
Contact	Captures the Employee that the data is related to (or about)
Received Handbook	Tracks if the Employee received an Employee Handbook
HR Policy Acknowledgement	Tracks if the Employee received HR Policies
Authorization for Payroll Deduction	Confirms deductions from Payroll are understood
PTO Policy Disclosure	Tracks if the Employee understands the PTO policy

Injury and Illness Disclosure	Tracks the Employee understands when to inform Employer of medical issue
Non Disclosure Agreement	Tracks if the Employee accepts the Non Disclosure
Background Check Consent	Confirms the Employee is OK with a Background Check
Location of Drug Screen	Allows the Employee to select the testing facility
Urine & Drug Testing Consent	Confirms the Employee understands the needed tests
MVR Form	Confirms the Employee Driving Record will be reviewed
Review Status	Tracks if the data has been reviewed by HR

Create New Consents

1. Find the associating Employee File Record
2. Click the **New** button in the 'Traffic Light' section

Tip: A new Record could also be created from the Contact Record using the Consent Related List and the **New** button.

3. Populate the desired Fields, using consideration for the above mentioned Fields
4. Click the **Save** button when satisfied

Modify Existing Consents

1. Find the desired Consent Record

Tip: Likely located from the Employee File 'Traffic Lights'. However, can be found via the Contact or Employee File Record using the Related List section or through the Consents Tab.

2. Click the **Edit** button
3. Populate the desired Fields, using consideration for the above mentioned Fields
4. Click the **Save** button when satisfied

Benefits Enrollment

This Object will determine what, if any, benefits the New Hire would like to participate in; including Health, Dental, and/or Vision. Fields are available to determine how many people would be enrolling on the plan; Employee Only, Employee+Child, Family, etc.

Recommended Fields include:

Field Name	Purpose

Contact	Captures the Employee that the data is related to (or about)
Employee Status	Captures how many hours the Employee is expected to work
I DO NOT wish to participate	Allows the Employee to include or exclude from all Benefits
Waive Health/Dental Benefits	Allows the Employee to include or exclude from Health and/or Dental Benefits
Medical Benefits	Tracks who from the Employee's family will be covered under Health Insurance
Coverage Type	Determines what level of Health Insurance is desired
Dental Benefits	Tracks who from the Employee's family will be covered under Dental Insurance
Dental Choices	Determines what level of Dental Insurance is desired
Review Status	Tracks if the data has been reviewed by HR

Create New Benefits Enrollment

1. Find the associating Employee File Record
2. Click the **New** button in the 'Traffic Light' section

Tip: A new Record could also be created from the Contact Record using the Benefits Enrollment Related List and the **New** button.

3. Populate the desired Fields, using consideration for the above mentioned Fields
4. Click the **Save** button when satisfied

Modify Existing Benefits Enrollment

1. Find the desired Benefits Enrollment Record

Tip: Likely located from the Employee File 'Traffic Lights'. However, can be found via the Contact or Employee File Record using the Related List section or through the Benefits Enrollment Tab.

2. Click the **Edit** button
3. Populate the desired Fields, using consideration for the above mentioned Fields
4. Click the **Save** button when satisfied

Dependent

This Object will be used to house the personal details of any individuals to be listed as a Dependent for Benefits – Spouse, Child, etc.

Recommended Fields include:

Field Name	Purpose
Covered Employee	Captures the Employee that the data is related to (or about)
Enroll in dental?	Tracks if this Dependent will be covered for Dental Insurance
Enroll in medical?	Tracks if this Dependent will be covered for Medical Insurance
Enroll in vision?	Tracks if this Dependent will be covered for Vision Insurance
Firstname	First Name of the Dependent for Insurance
Lastname	Last Name of the Dependent to be covered for Insurance
Gender	Captures the Gender of the Dependent to be covered for Insurance
Relative Code	Tracks the relationship of the Dependent & Employee

Create New Dependent

1. Find the associating Employee File Record
2. Click the **New** button in the 'Traffic Light' section

Tip: A new Record could also be created from the Contact Record using the Dependent Related List and the **New** button.

3. Populate the desired Fields, using consideration for the above mentioned Fields
4. Click the **Save** button when satisfied

Modify Existing Dependent

1. Find the desired Dependent Record

Tip: Likely located from the Employee File 'Traffic Lights'. However, can be found via the Contact or Employee File Record using the Related List section or through the Dependent Tab.

2. Click the **Edit** button
3. Populate the desired Fields, using consideration for the above mentioned Fields
4. Click the **Save** button when satisfied

Accommodation

This Object is used to collect details regarding any needed Reasonable Accommodations needed by an New Hire to complete their Job Duties.

Recommended Fields include:

Field Name	Purpose
Contact	Captures the Employee that the data is related to (or about)
Position Title	Captures the Job related to the Contact
Performance	Tracks how successful the Contact can complete the Job
Required Accommodation	Captures the type and nature of the requested accommodation
Review Status	Tracks if the data has been reviewed by HR

Create New Accommodation

1. Find the associating Employee File Record
2. Click the **New** button in the 'Traffic Light' section

Tip: A new Record could also be created from the Contact Record using the Accommodation Related List and the **New** button.

3. Populate the desired Fields, using consideration for the above mentioned Fields
4. Click the **Save** button when satisfied

Modify Existing Accommodation

1. Find the desired Accommodation Record

Tip: Likely located from the Employee File 'Traffic Lights'. However, can be found via the Contact or Employee File Record using the Related List section or through the Accommodation Tab.

2. Click the **Edit** button
3. Populate the desired Fields, using consideration for the above mentioned Fields
4. Click the **Save** button when satisfied

Emergency Contact

This Object will collect the preferred individuals to contact in case of an Emergency to the Employee during work. By default, the Object collects 2 possible Contacts but more Fields could be created to capture more desired Contacts.

Recommended Fields include:

Field Name	Purpose
Contact	Captures the Employee that the data is related to (or about)
Emergency Contact 1	Captures the name of the desired primary contact

Relationship 1	Captures the nature of the relationship to the primary contact
Emergency Contact Address 1	Captures the address of the relationship to the primary contact
Emergency Contact Phone 1	Captures the phone number of the relationship to the primary contact
Alternative Number 1	Captures the backup phone number of the relationship to the primary contact
Emergency Contact Name 2	Captures the name of the desired secondary contact
Relationship 2	Captures the nature of the relationship to the secondary contact
Emergency Contact Address 2	Captures the address of the relationship to the secondary contact
Emergency Contact Phone 2	Captures the phone number of the relationship to the secondary contact
Alternative Number 2	Captures the backup phone number of the relationship to the secondary contact
Review Status	Tracks if the data has been reviewed by HR

Create New Emergency Contact

1. Find the associating Employee File Record
2. Click the **New** button in the 'Traffic Light' section

Tip: A new Record could also be created from the Contact Record using the Emergency Contact Related List and the **New** button.

3. Populate the desired Fields, using consideration for the above mentioned Fields
4. Click the **Save** button when satisfied

Modify Existing Emergency Contact

1. Find the desired Emergency Contact Record

Tip: Likely located from the Employee File 'Traffic Lights'. However, can be found via the Contact or Employee File Record using the Related List section or through the Emergency Contact Tab.

2. Click the **Edit** button
3. Populate the desired Fields, using consideration for the above mentioned Fields
4. Click the **Save** button when satisfied

EEO

This Object will collect data points to support the companies efforts towards an Equal Employment Environment.

Recommended Fields include:

Field Name	Purpose
EEO Candidate	Captures the Employee that the data is related to (or about)
Sex Identification	Captures the gender
Race & Identification	Captures the nationality
Disabled	Captures if any disability exist
Veteran Status	Captures if any military service was serviced
I choose not to participate	Captures if the Employee was unwilling to provide the data points
Review Status	Tracks if the data has been reviewed by HR

Create New EEO

1. Find the associating Employee File Record
2. Click the **New** button in the 'Traffic Light' section

Tip: A new Record could also be created from the Contact Record using the EEO Related List and the **New** button.

3. Populate the desired Fields, using consideration for the above mentioned Fields
4. Click the **Save** button when satisfied

Modify Existing EEO

1. Find the desired EEO Record

Tip: Likely located from the Employee File 'Traffic Lights'. However, can be found via the Contact or Employee File Record using the Related List section or through the EEO Tab.

2. Click the **Edit** button
3. Populate the desired Fields, using consideration for the above mentioned Fields
4. Click the **Save** button when satisfied

Driver

This Object will collect data points for individuals that are responsible for during for normal job responsibilities.

Recommended Fields include:

Field Name	Purpose
Contact	Captures the Employee that the data is related to (or about)
Date of Birth	Tracks the Birthday of the Employee
State of License	Captures the State where the Driver License is from
Driver's License Number	Tracks the number listed on the Driver's License
Auto Insurer	Captures which company insurers the automobile
Review Status	Tracks if the data has been reviewed by HR

Create New Driver

1. Find the associating Employee File Record
2. Click the **New** button in the 'Traffic Light' section

Tip: A new Record could also be created from the Contact Record using the Driver Related List and the **New** button.

3. Populate the desired Fields, using consideration for the above mentioned Fields
4. Click the **Save** button when satisfied

Modify Existing Driver

1. Find the desired Driver Record

Tip: Likely located from the Employee File 'Traffic Lights'. However, can be found via the Contact or Employee File Record using the Related List section or through the Driver Tab.

2. Click the **Edit** button
3. Populate the desired Fields, using consideration for the above mentioned Fields
4. Click the **Save** button when satisfied

Direct Deposit

This object assists Payroll in ensuring paychecks are deposited to the proper banking accounts.

Recommended Fields include:

Field Name	Purpose
Contact	Captures the Employee that the data is related to (or about)
Name of Financial Institution	Name of the Bank accepting funds

Primary Account Type	Describes the type of Bank Account accepting funds
Account Number	Captures the Bank Account Number
Routing Number	Captures the Routing Number
Deposit Amount 1	Tracks of much money of the check should be deposited
Bnk1Entire Net Amount	Tracks if the remainder should be deposited
Name of Financial Institution 2	Name of the Bank accepting funds
Secondary Account Type	Describes the type of Bank Account accepting funds
Account Number 2	Captures the Bank Account Number
Secondary Routing Number	Captures the Routing Number
Deposit Amount 2	Tracks of much money of the check should be deposited
Bnk2Entire Net Amount 2	Tracks if the remainder should be deposited
Name of Financial Institution 3	Name of the Bank accepting funds
Third Account Type	Describes the type of Bank Account accepting funds
Account Number 3	Captures the Bank Account Number
Third Routing Number	Captures the Routing Number
Deposit Amount 3	Tracks of much money of the check should be deposited
Bnk3Entire Net Amount 3	Tracks if the remainder should be deposited
Review Status	Tracks if the data has been reviewed by HR

Create New Direct Deposit

1. Find the associating Employee File Record
2. Click the **New** button in the 'Traffic Light' section

Tip: A new Record could also be created from the Contact Record using the Direct Deposit Related List and the **New** button.

3. Populate the desired Fields, using consideration for the above mentioned Fields
4. Click the **Save** button when satisfied

Modify Existing Direct Deposit

1. Find the desired Direct Deposit Record

Tip: Likely located from the Employee File 'Traffic Lights'. However, can be found via the Contact or Employee File Record using the Related List section or through the Direct Deposit Tab.

2. Click the **Edit** button
3. Populate the desired Fields, using consideration for the above mentioned Fields
4. Click the **Save** button when satisfied

W-4

This Object will collect the desired Federal tax withholdings per paycheck.

Recommended Fields include:

Field Name	Purpose
Line 1 - Contact	Captures the Employee that the data is related to (or about)
Line 2 - SSN	Captures the Social Security Number of the Employee
Line 3 - Martial Filing Status	Captures the Relationship status of the Employee (Options include Single, Married, or Withhold)
Line 4 - Lastname differs from SSN Card	Tracks if the Last Name of the Employee is different from the provided Social Security Card
Line 5 - Total number of allowances	Captures the amount of Allowances to offset Taxes
Line 6 - Additional amount withheld	Captures any additional funds desired to be withdrawn for Tax payment
Line 7 - Exempt	Captures if the Employee is considered Exempt for taxes
Line 9 - First date of employment	Tracks the 1st day of employment
Review Status	Tracks if the data has been reviewed by HR

Create New W-4

1. Find the associating Employee File Record
2. Click the **New** button in the 'Traffic Light' section

Tip: A new Record could also be created from the Contact Record using the W-4 Related List and the **New** button.

3. Populate the desired Fields, using consideration for the above mentioned Fields
4. Click the **Save** button when satisfied

Modify Existing W-4

1. Find the desired W-4 Record

Tip: Likely located from the Employee File 'Traffic Lights'. However, can be found via the Contact or Employee File Record using the Related List section or through the W-4 Tab.

2. Click the **Edit** button
3. Populate the desired Fields, using consideration for the above mentioned Fields

4. Click the **Save** button when satisfied

State Tax

This Object will collect the desired State tax withholdings per paycheck.

Recommended Fields include:

Field Name	Purpose
Contact	Captures the Employee that the data is related to (or about)
Martial Status	Captures the Relationship status of the Employee
Dependent Allowances	Tracks how many legal Dependent the Employee claims for tax purposes
Estimated Federal Deduction	Captures the amount the Employee expects to receive as Federal deduction to offset Taxes
State Deductions	Tracks the amount the Employee expects to receive as State deduction to offset Taxes
Additional Allowances	Captures any additional amount to be considered for Tax payment
Additional Withholding	Captures any additional funds desired to be withdrawn for Tax payment
Review Status	Tracks if the data has been reviewed by HR

Create New State Tax

1. Find the associating Employee File Record
2. Click the **New** button in the 'Traffic Light' section

Tip: A new Record could also be created from the Contact Record using the State Tax Related List and the **New** button.

3. Populate the desired Fields, using consideration for the above mentioned Fields
4. Click the **Save** button when satisfied

Modify Existing State Tax

1. Find the desired State Tax Record

Tip: Likely located from the Employee File 'Traffic Lights'. However, can be found via the Contact or Employee File Record using the Related List section or through the State Tax Tab.

2. Click the **Edit** button
3. Populate the desired Fields, using consideration for the above mentioned Fields

4. Click the **Save** button when satisfied

I-9

This Object is used to confirm the working eligibility of the New Hire.

Recommended Fields include:

Field Name	Purpose
Contact	Captures the Employee that the data is related to (or about)
Middle Name	Captures the Middle Name (if any)
Maiden Name	Captures the Maiden Name (if any)
Social Security Number	Captures the Social Security Number
DOB	Captures the Date of Birth
Telephone	Captures the main Phone Number
A Citizen of the U.S.	Tracks if the Employee is a Citizen of the US
A National of the U.S.	Tracks if the Employee is a National of the US
A lawful permanent resident	Tracks if the Employee is lawfully allowed in the US
Alien Number	Captures the Number assigned for Alien status
An alien authorized to work	Captures if the Employee is lawfully allowed to work in the US
Alien or Admission #	Captures the Number assigned for Working status
Alien Expire	Tracks when the Alien status expires
I-94 Admission Number	Captures the Admission number assigned to the Employee
Foreign Passport Number	Captures the Passport Number
Country of Issuance	Captures the Country where the Passport is from
Document Provided	Tracks what type of Documents are supplied to verify the I9
List A Document Type	Tracks where the Document originated
List A Title	Determines the Document supplied
List A DocNo	Captures the Document Number
Expiration Date	Tracks Expiration Date of the document
List A Document Type (Option 2)	Tracks where the Document originated
List A Title (Option 2)	Determines the Document supplied
List A DocNo (Option 2)	Captures the Document Number
List A Expiration Date (Option 2)	Tracks Expiration Date of the document
List A Document Type (Option 3)	Tracks where the Document originated

List A Title (Option 3)	Determines the Document supplied
List A DocNo (Option 3)	Captures the Document Number
List A Expiration Date (Option 3)	Tracks Expiration Date of the document
List B Document Type	Tracks where the Document originated
List B Title	Determines the Document supplied
List B DocNo	Captures the Document Number
List B Expire	Tracks Expiration Date of the document
List C Document Type	Tracks where the Document originated
List C Title	Determines the Document supplied
List C DocNo	Captures the Document Number
List C Expire	Tracks Expiration Date of the document
Employer Business or Organization	Captures the Employer Business Name
Employer Street Address	Captures the Employer Street Address
Employer City or Town	Captures the Employer City Name
Employer State	Captures the Employer State Name
Employer Zip Code	Captures the Employer Zip Code
Employer First Name	Captures the Employer First Name reviewing the I9 data
Employer Last Name	Captures the Employer Last Name reviewing the I9 data
Title of Employer	Captures the Employer’s Title reviewing the I9 data
Date of Employer signature	Captures the date the I9 data is reviewed
Use Preparer	Tracks if the I9 was completed with the help of a Preparer or Translator
Preparer First Name	Captures the First Name of the Preparer/Translator
Preparer Last Name	Captures the Last Name of the Preparer/Translator
Preparer Street Address	Captures the Street Address of the Preparer/Translator
Preparer City or Town	Captures the City Name of the Preparer/Translator
Preparer State	Captures the State Name of the Preparer/Translator
Preparer Zip Code	Captures the Zip Code of the Preparer/Translator
Preparer Sign Date	Captures the date the Preparer/Translator assisted
Employee First day of employment	Captures the 1st day of work for the Employee
Employee Sign Date	Tracks the date when Employee provided data

I Attest	Confirms the Employee provided accurate information
Review Status	Tracks if the data has been reviewed by HR

Create New I-9

1. Find the associating Employee File Record
2. Click the **New** button in the 'Traffic Light' section

Tip: A new Record could also be created from the Contact Record using the I-9 Related List and the **New** button.

3. Populate the desired Fields, using consideration for the above mentioned Fields
4. Click the **Save** button when satisfied

Modify Existing I-9

1. Find the desired I-9 Record

Tip: Likely located from the Employee File 'Traffic Lights'. However, can be found via the Contact or Employee File Record using the Related List section or through the I-9 Tab.

2. Click the **Edit** button
3. Populate the desired Fields, using consideration for the above mentioned Fields
4. Click the **Save** button when satisfied

Common Practices

It is possible to have more than one Onboarding Record per Object. Example, it may be common to have multiple State Tax or W-4 Records as the Tax Needs of the Employee change over their tenure with the company. This is an acceptable method. When this situation is present, the Employee File 'Traffic Lights' will link to the most recently created Record.

Generate Government PDF

For the Objects of I9 and W-4, the Onboarding product can generate a PDF document that looks identical to form that is completed by hand. The data points will be populated with the collected information on the Record. The **Generate PDF** button will display when the Record has been set to *Review Status* of Complete.

Create PDF

1. Find the associating Employee File Record
2. Scroll to the 'Traffic Light' section

3. Click the **Generate PDF** button and a new window will display
4. Click the **View PDF** button to access the generated PDF