Work Instruction: Creating a New Hire in Onboarding

1. Audience
Human Resources

2. Objective:
To onboard new hires/rehires (via ADP)

3. Revision and Approval

Rev.	Date	Nature of Changes	Approved By
N	09/03/2021	Original issue.	Glawe
001	10/26/2021	Added deviation for the rehire process.	Glawe
002	05/01/2023	Converted to ADP	Glawe
003	02/29/2024	Updated New HR Department #	Glawe

4. Scope
This requirement covers the HR admins and all new hires.

5. Prerequisites

6. Records
Employee personnel files (electronic)

7. Associated Documents
PRF-90-041 Employee onboarding process

8. Evaluative Factors

9. Responsibility
HR is responsible for maintaining employee records in ADP

10. Instructions
After the new hire is cleared to start working. Follow up with supervisor for start date and work schedule. Using the authorization to hire form put in a ticket to request any required equipment or login info so IT can begin working on those needs.

1. Navigate to **Setup** > **HR and Talent** > **Manage Onboarding**

2. **Onboarding Experiences**
   a. On the **Onboarding Experiences** tab click **New Onboarding Experience.**
   b. Assign a name to the new experience and click **Ok**.
      - **Tip**: You can save time by locating an existing onboarding experience, clicking the edit menu (3 vertical dots) and choosing copy. Then, Edit as needed.
   c. The steps below can be updated and reordered (All steps can be reordered EXCEPT for Welcome and Summary). The practitioner can change documents to be Required, Optional, or Off. However, the Profile step should come before the Paperwork step since the employee will not be able to access Paperwork until they have visited the Profile step. The assigned experience will default to being available for 7 days from hire date, but can be edited to up to 30 days. The banner can be displayed until all required paperwork has been completed (up to 30 days).
      - Welcome Letter
      - Video
      - Team
      - Profile
      - Paperwork
        - The practitioner can define which tiles will be available under the Paperwork step of the experience.
          - This includes Form I-9, which will only display for clients who have the Electronic Form I-9 feature (EI-9) activated in the Client Setup Wizard.
      - In the New Hire / Prehire / Rehire process, the practitioner must indicate if the employee will complete Form I-9 on paper or electronically. When the indicator is selected as Paper Form I-9, Form I-9 tile will not display in Onboarding Paperwork step.

- Company Information
- Summary

3. Document Setup: Documents can be added for the employee to view/download.
    a. **Note**: If you have Document Cloud, the documents appear in Document Cloud as well.
    b. Individual documents can be uploaded to more than one onboarding experience at a time.
    c. Documents that require an electronic signature can be uploaded and designated as such. When uploading the document, check the box to "Require Electronic Signature."
        - Two options are available, Standard or Advanced.
            - **Standard signature:** Provides the employee with boxes to enter their first and last name, a box to check off with an acknowledgement message, and a button, **Sign**, to complete the acknowledgement. There is no option to decline. Once accepted, the signature information will be added to the end of the document.
            - **Advanced signature:** Provides the employee with boxes to enter their first and last name, and buttons for either **I Accept** or **I Decline** to complete the acknowledgement. Once accepted, the signature information will be added to the end of the document.
        - The electronic signature consent statement is also included.
        - Any document that was signed electronically can be seen and downloaded from: **People** > **Employment** > **Employment Profile** > **Status** > **Supporting Documents**.

4. Document Requests can be used to request specific documents for the Employee to upload.
    a. Select the **Document Request** tab > Select **+Add Document Request**
        - Enter a name for the document

- Select Yes or No to determine if the document is required
- Select Yes or No if an administrator will need to review
- You can add special instructions to the document to assist the employee
- Assign the documents to one or more onboarding experiences by moving them from Available to Selected

b. All documents created can be edited and/or deleted from the Document Request area. **NOTE**: Documents assigned to in progress Onboarding experiences prior to the change will remain for the employee to complete.