

## Work Instruction: Launching an Onboarding Event Packet

### 1. Audience

Human Resources

### 2. Objective:

To convert employee from onboard to new hires/rehires (via Paylocity)

### 3. Revision and Approval

Rev.	Date	Nature of Changes	Approved By
N	02/10/2021	Original issue.	Glawe
001	02/29/2024	Updated New HR Department #	Glawe

### 4. Scope

This instruction covers set-up requirements for all new hires

### 5. Prerequisites

PCTY Onboarding: Launching an Event Packet self-paced training (video)

PCTY Administrator rights

### 6. Records

Employee personnel files (electronic)

### 7. Associated Documents

PRF-90-041 Employee onboarding process

### 8. Evaluative Factors

None

### 9. Responsibility

HR is responsible for maintaining employee records in Paylocity

### 10. Instructions

1. On the onboarding home screen under the Event column, select Caldwell New Hire next to the employee's name.

search for name, event, company, employee id ... Apply Filters Reset

[+ Create Employee](#) Active Complete Not Hired All

<input type="checkbox"/>	Progress	Status	Start Date	Participant Comp.	Expected Comp.	Name	Event	Company	Event Started	Employee Id	Finish
<input type="checkbox"/>	5/21	In Progress	11/24/2020	No	12/24/2020	<a href="#">Test Testy</a>	Caldwell Group New Hire	124509	11/23/2020	8616	

2. Tap Get started

Get Started

3. Status and Hire date will auto populate. Leave Adjusted Seniority date blank.

**Status** (required)

**Hire Date** (required)

**Adjusted Seniority Date**

4. Tap Next Task

Next Task

5. Department, Supervisor, Position, job Title, EEO Class, and Work Comp will auto populate. Enter Pay Group, Employment Type, and Reviewer.

- Pay Group – Enter regular for direct hires and Contractor for?
- Employment Type – Enter Regular Full-time for direct hires working 40+ hours per week. Enter Regular Part-Time for direct hires working 30 hours and less per week. Enter Temporary Full Time for Temporary Part Time for contractors and Temp agency employees.
- Reviewer – Enter Supervisor

6. Tap Next Task

Next Task

7. Work location, Address 1, City, State, and Zip will auto populate. Enter Employee's Work Phone, Work Phone Extension, Work Mobile Phone if applicable and enter work email for everyone

8. Tap Next Task

Next Task

9. Enter Per Check Salary. Rate, Per, and Pay Frequency will auto populate. Auto Pay select Salary for salaried employees. Enter None for hourly employees.

10. Tap Next Task

Next Task

11. Tax Form will auto populate to W2. SUI State enter the appropriate state for employee.

Tax Form (required)

W2

SUI State (required)

-- Select --

-- Select --

Florida SUI

Illinois SUI

Iowa SUI

Missouri SUI

12. Tap Next Task

Next Task

13. Select Benefit Class for employee. Tap Full Time Benefit Eligible employee for Full Time Hourly Direct Hires. Tap Salary Eligible Employees for Salaried Employees. Enter? for Temps

14. Tap Next Task

Next Task

15. Enable Time & Labor should auto populate with a check mark. Time & Labor Badge Number enter employee ID. Payroll Policy will auto populate. Enter shift differently only if an employee is scheduled to work 2<sup>nd</sup> or weekend shifts and leave blank for 1<sup>st</sup> shift employees. Select holiday list for all employees except those that work the weekend shift. Select appropriate Department you can find the information on the

Next Step will typically be WI-90-xxx