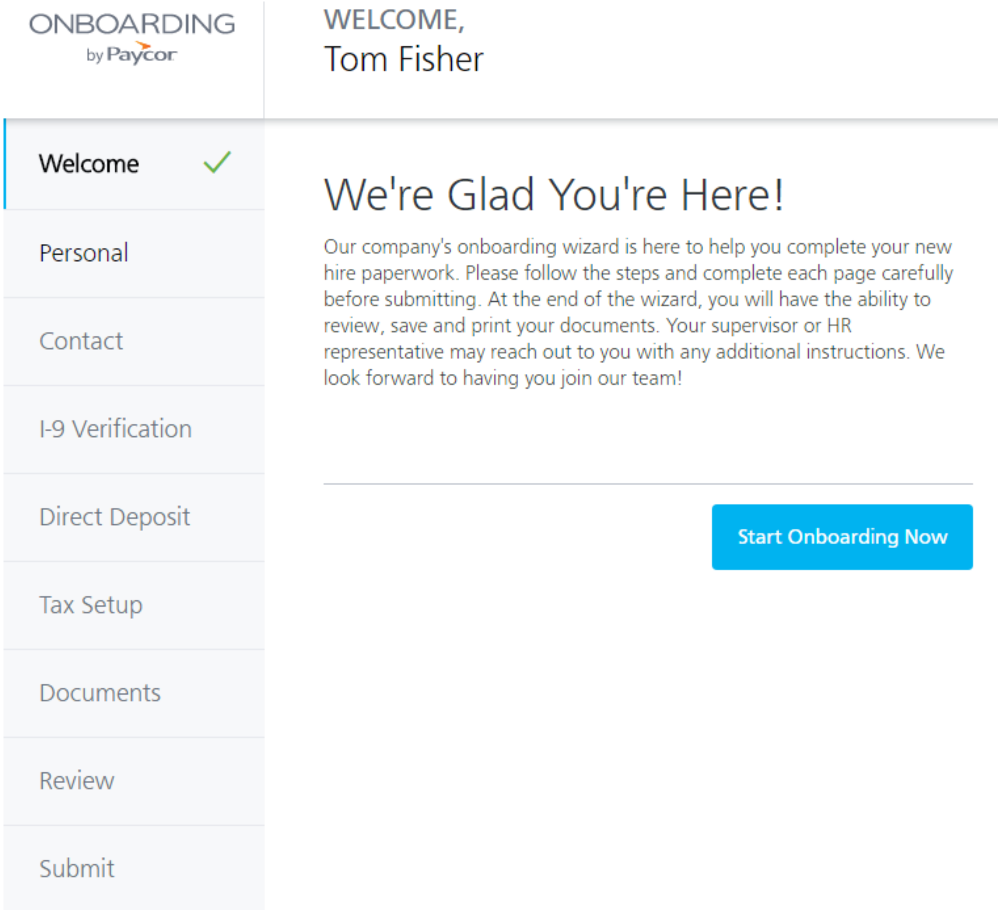
newton

Onboarding Guide

Newton Software, Inc. | 415-593-1190 | San Francisco



Introduction to Onboarding

Newton Onboarding will give your organization a head start on the new hire process by granting new employees the ability to complete new hire paperwork electronically in advance of the start date.

Onboarding also provides a place to house any company documents required for new hires, such as employee handbooks, policy documents, etc..

After purchasing the Onboarding add-on, Newton will work with you to set up the feature. The purpose of this guide is review your post-launch configuration options and the overall onboarding workflow.

Overview of Onboarding Workflow

Onboarding – Process Overview

1. A candidate is hired in Newton, and exported into the Onboarding module.

2. Onboarding Admin initiates a New Hire Invitation. This involves adding the New Hire to an “Onboarding Group”, and sending the New Hire an email to electronically fill out onboarding documents.

3. The New Hire receives a registration email, and is guided through an “Onboarding Wizard”, which prompts them to fill out and electronically submit all required onboarding documents and forms.

4. Onboarding Admin receives email alert that a pending new hire has submitted their onboarding documents. Onboarding Admin reviews the information submitted by the New Hire, completes any remaining required fields, then formally “Hires” the candidate within Onboarding, thereby completing the onboarding process for this new employee.

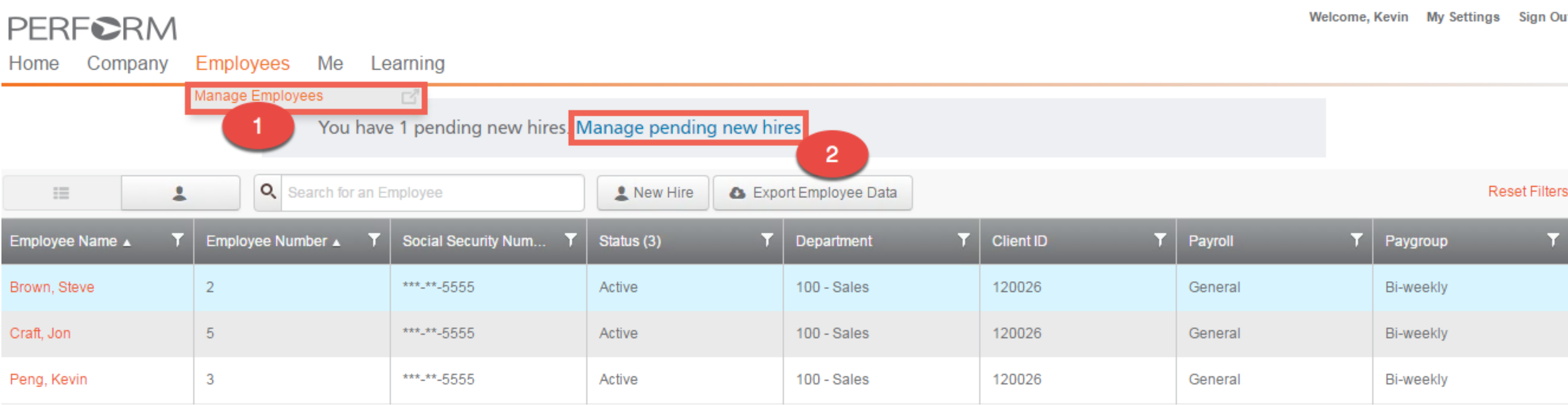
5. The New Hire is removed from the Pending Employees list, and moved to the Active Employee list.

6. Employee data can be exported individually or in bulk.

Initiating New Hire Invitation

New Hires exported from Newton ATS* will appear in the **Pending New Hires** area.

To view this area, click into “**Manage Employees**” (under the Employees menu), then “**Manage Pending New Hires**”.



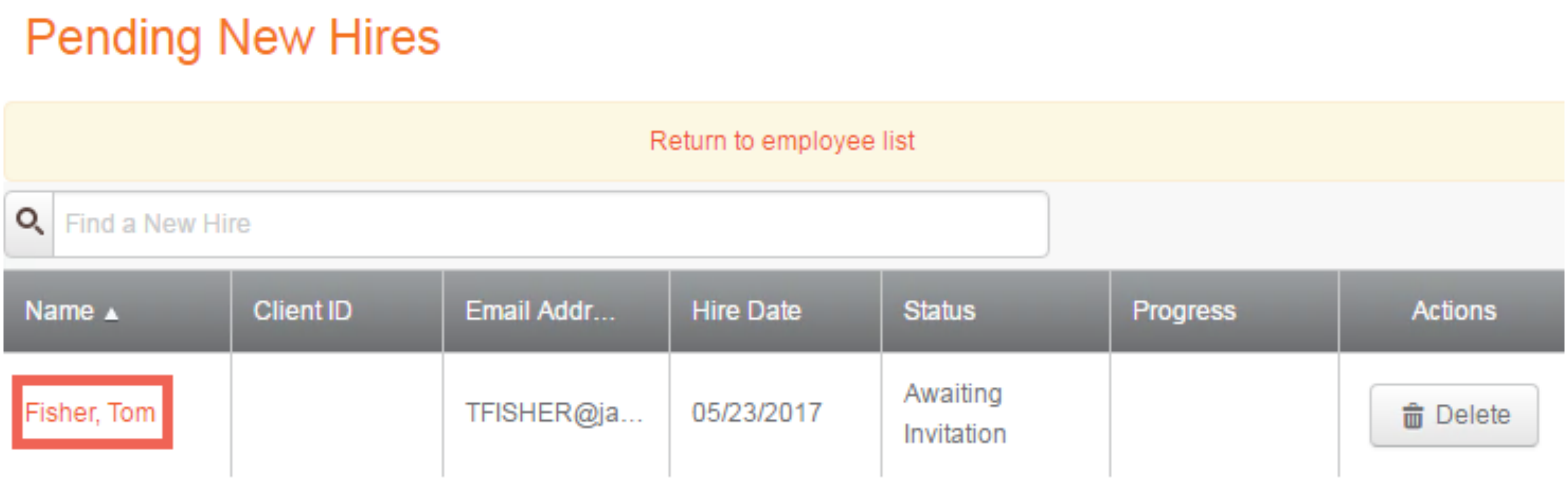
*For instructions on how to export new hires from Newton ATS, please view our guide here.

Alternatively, you can manually create a New Hire record directly within Onboarding, by clicking the “New Hire” button.

Initiating New Hire Invitation

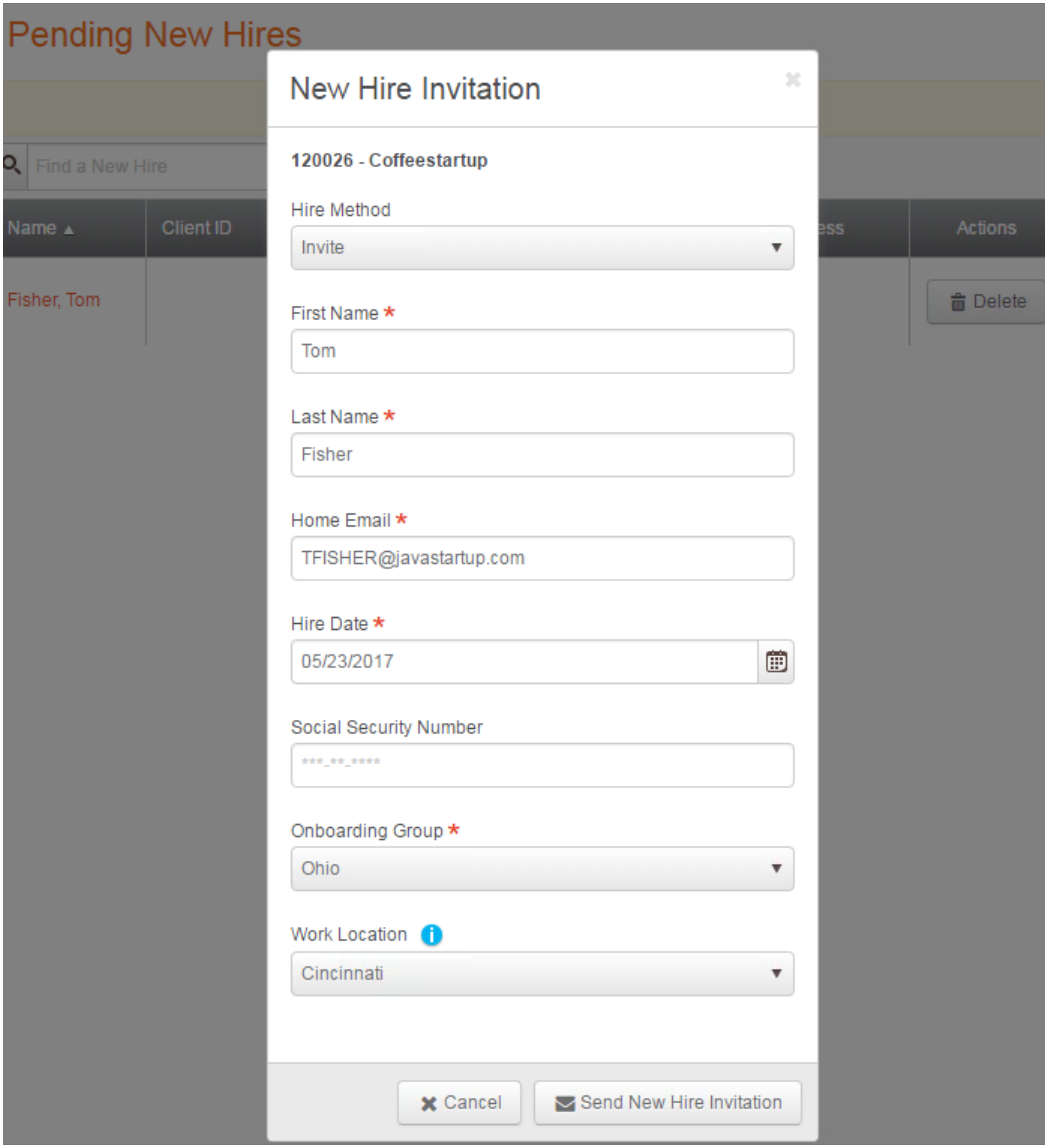
The Pending New Hires area contains all New Hires that have not yet completed their onboarding documents, along with their current status.

Click the name of the New Hire for whom you wish to initiate a New Hire invitation.



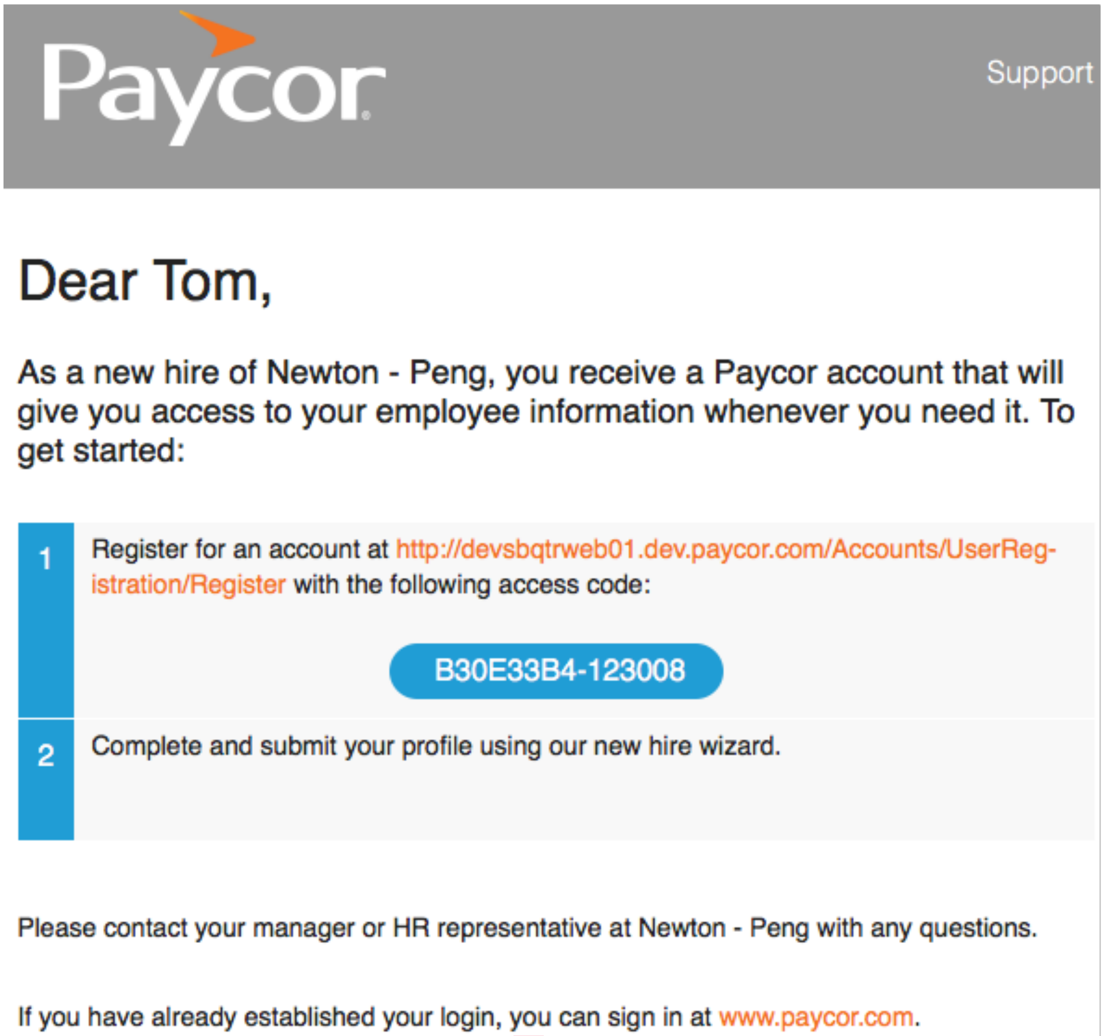
Initiating New Hire Invitation

A prompt appears with basic information on the New Hire. Assign an Onboarding Group and Work Location for the New Hire, then click "**Send New Hire Invitation**" to send the New Hire an email with information on how to register and begin completing his/her Onboarding documents.



The New Hire Experience

After inviting the new hire into the Onboarding platform, he/she will be sent an email containing instructions on how to sign-in and complete the paperwork.



Paycor

Support

Dear Tom,

As a new hire of Newton - Peng, you receive a Paycor account that will give you access to your employee information whenever you need it. To get started:

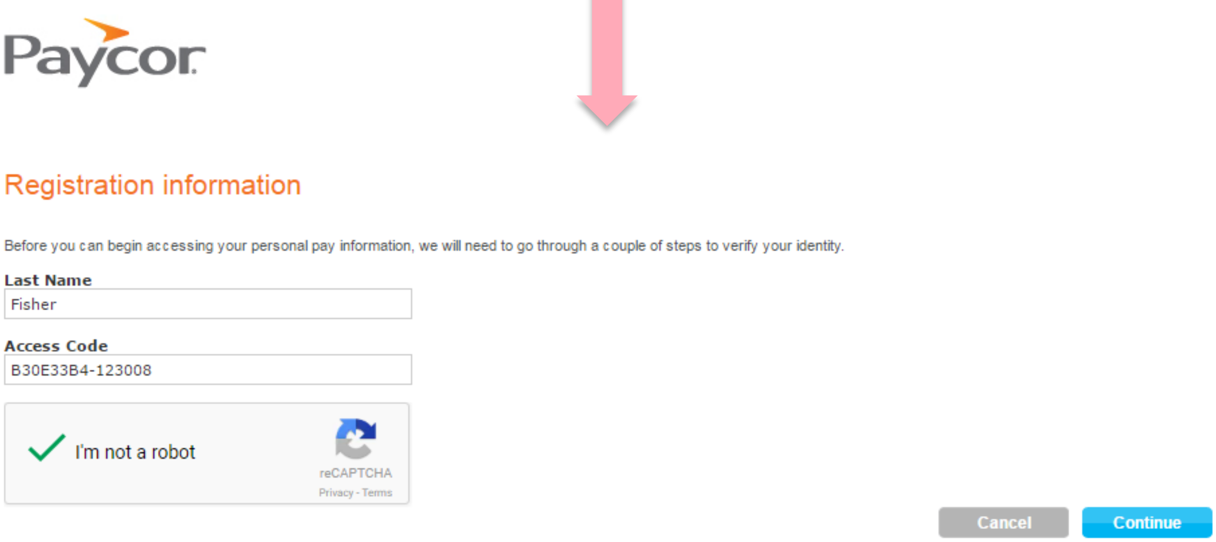
1. Register for an account at http://devsbqtrweb01.dev.paycor.com/Accounts/UserRegistration/Register with the following access code:

   B30E33B4-123008

2. Complete and submit your profile using our new hire wizard.

Please contact your manager or HR representative at Newton - Peng with any questions.

If you have already established your login, you can sign in at www.paycor.com.



Paycor

Registration information

Before you can begin accessing your personal pay information, we will need to go through a couple of steps to verify your identity.

Last Name

Fisher

Access Code

B30E33B4-123008

I'm not a robot

reCAPTCHA

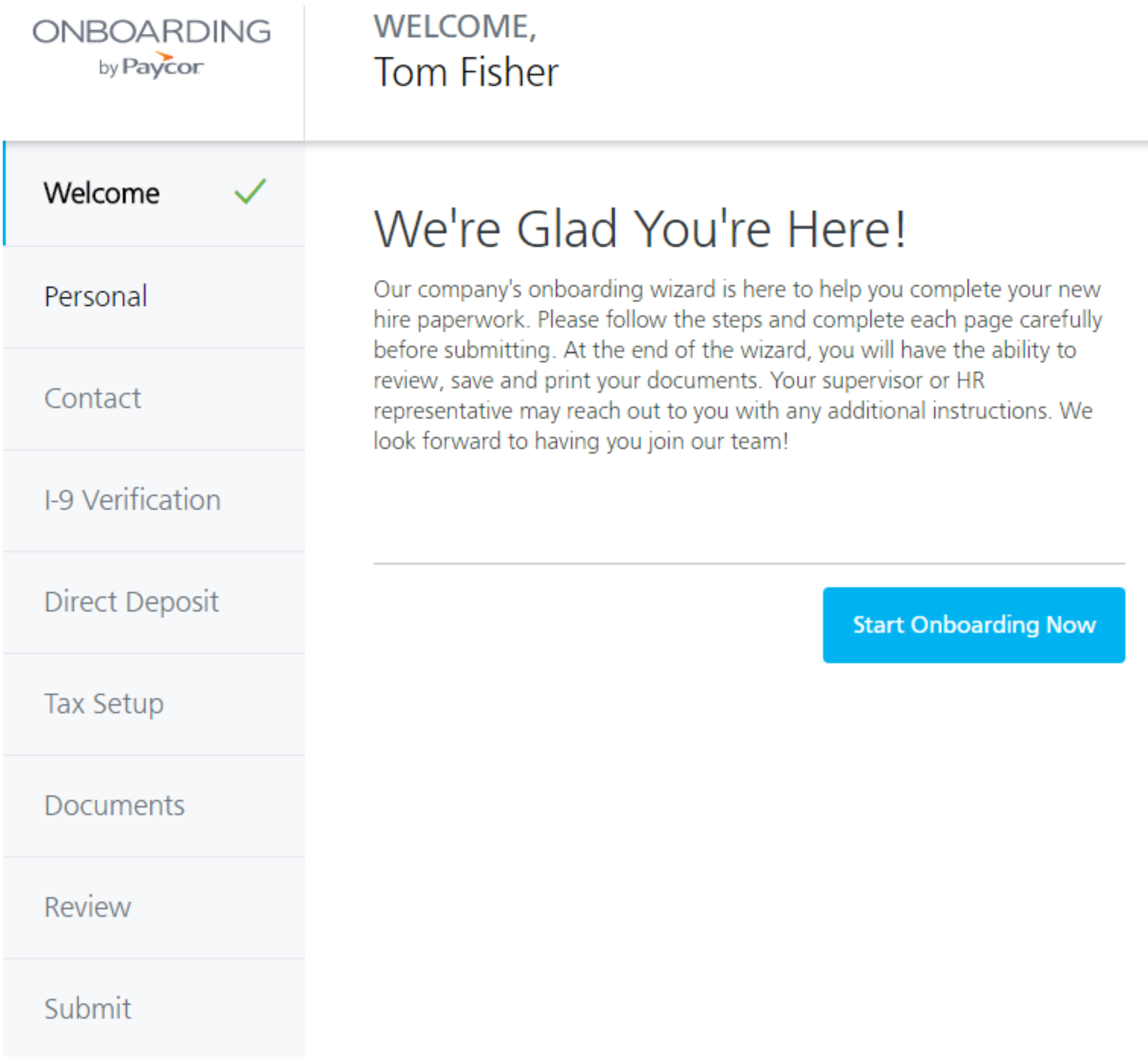
Privacy - Terms

Cancel

Continue

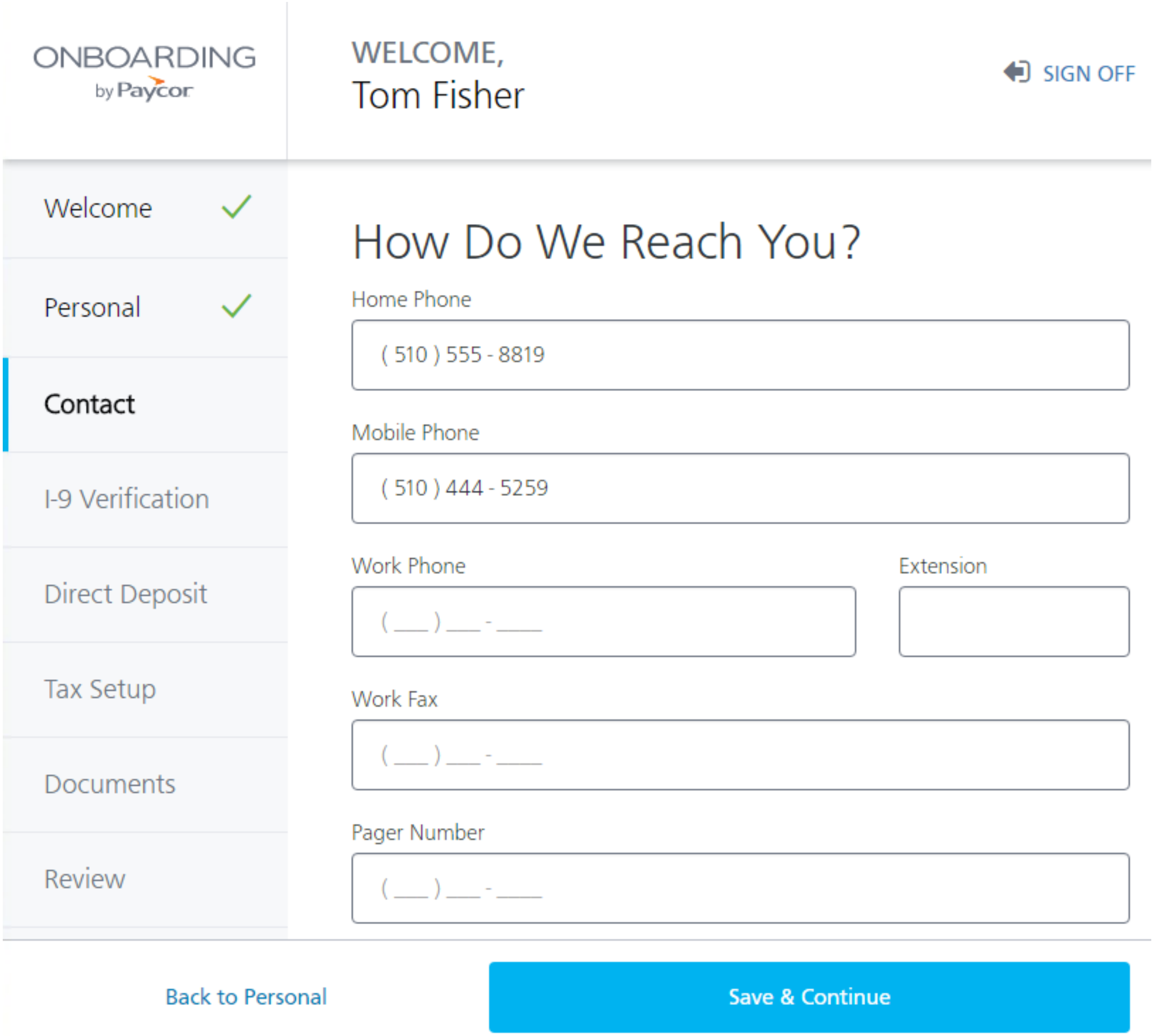
The New Hire Experience

The New Hire will then be guided through an Onboarding wizard, customized according to your organization's needs. The following pages show various steps along this process.



The New Hire Experience

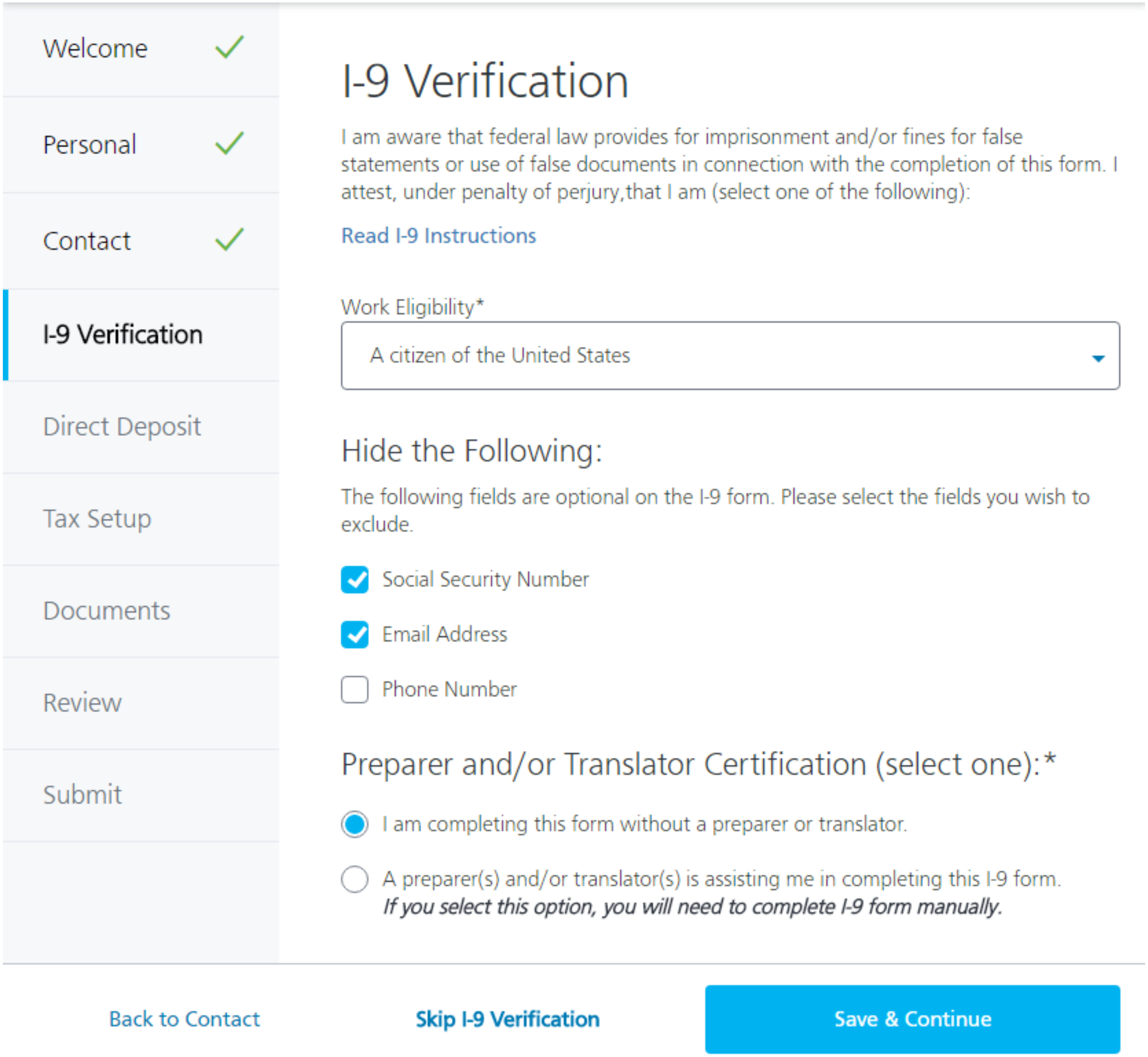
The New Hire does not need to complete the entire onboarding process in one session. They can return at any time, and anything already filled out (as indicated by the green checkmark) will be saved.



The New Hire Experience

During the I-9 Verification step, if the New Hire chooses to exclude the optional Social Security Number, email address or phone number fields, those fields will be left blank on the I-9 form.

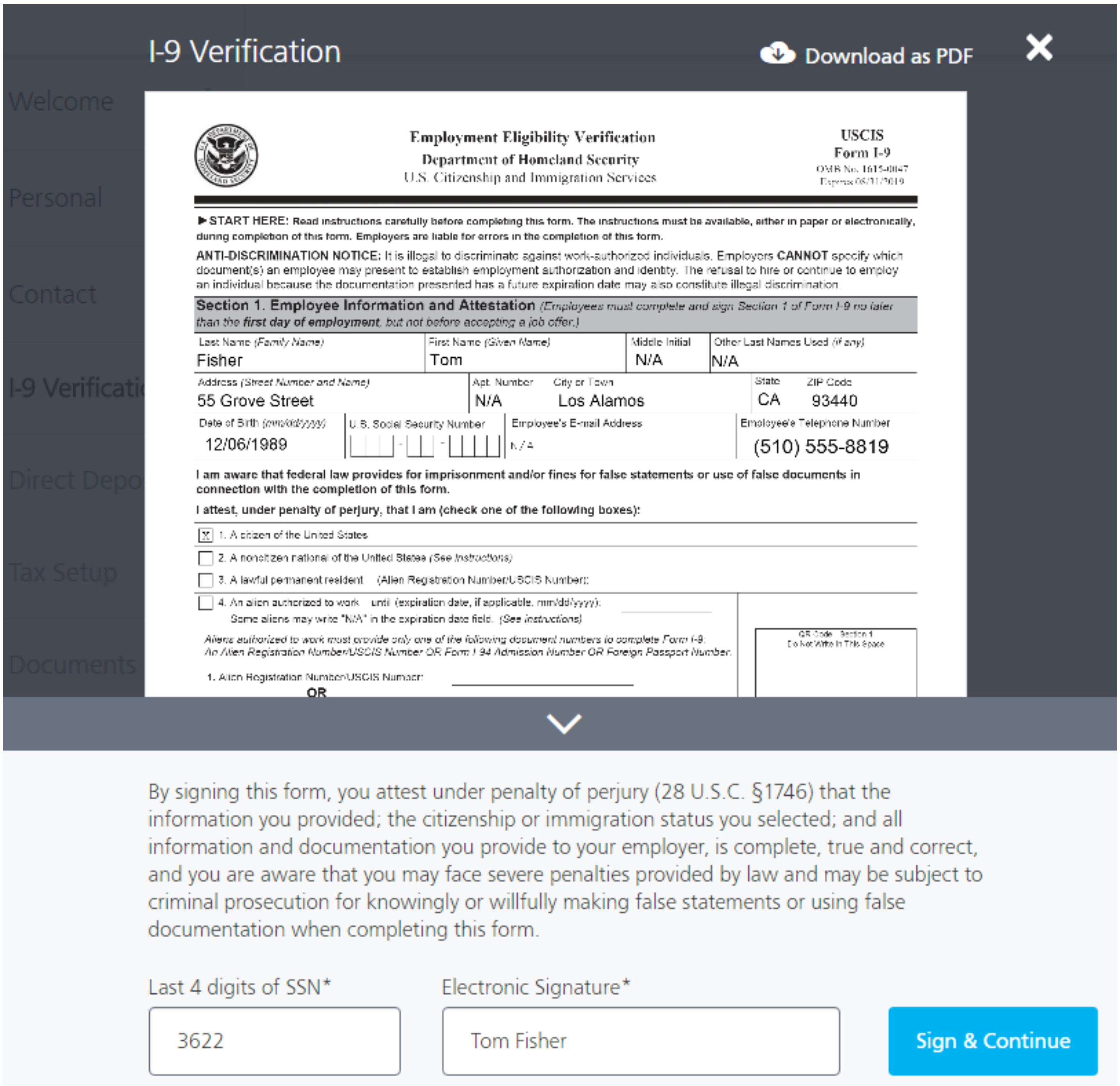
If the New Hire chooses to either skip I-9 Verification, or elects to have a preparer or translator complete the I-9 form on his behalf, they will have to complete the I-9 form manually.



The New Hire Experience

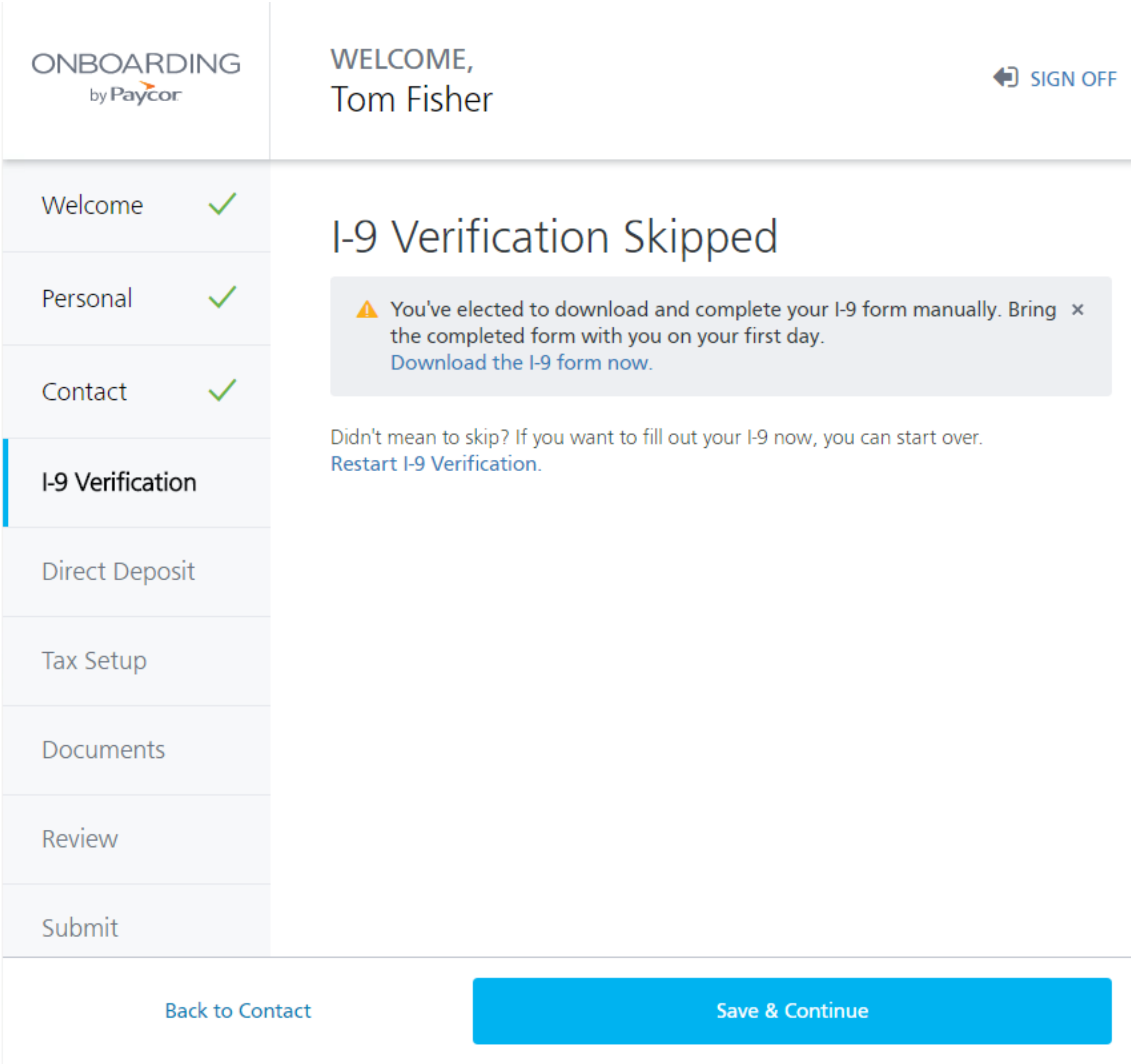
New Hires can review then digitally sign the I-9 Form.

Note that the Social Security Number field is blanked out because the New Hire chose to exclude it on the previous screen.



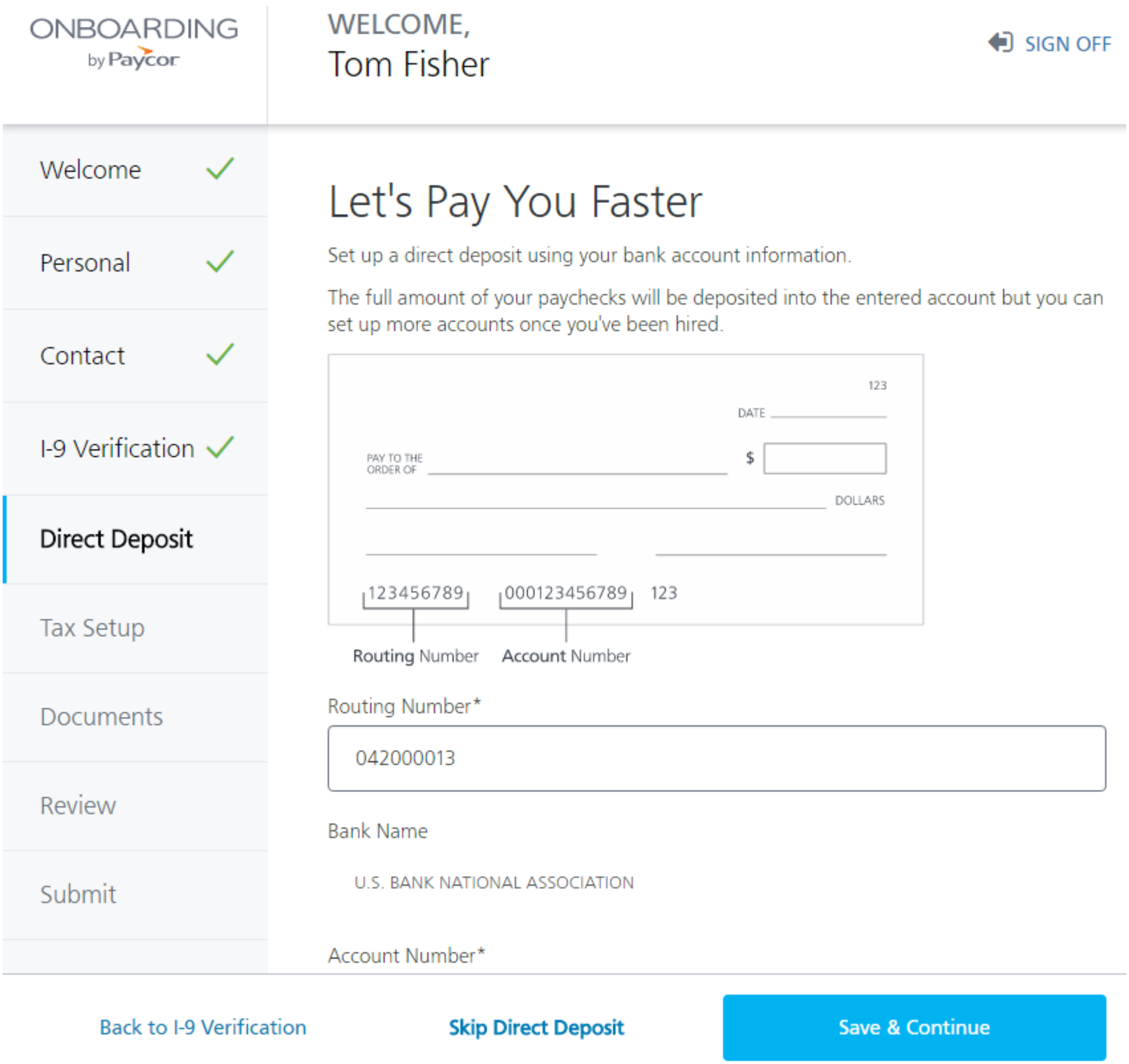
The New Hire Experience

If a New Hire chooses to skip the I-9 verification, he/she will be able to download the form to complete manually.



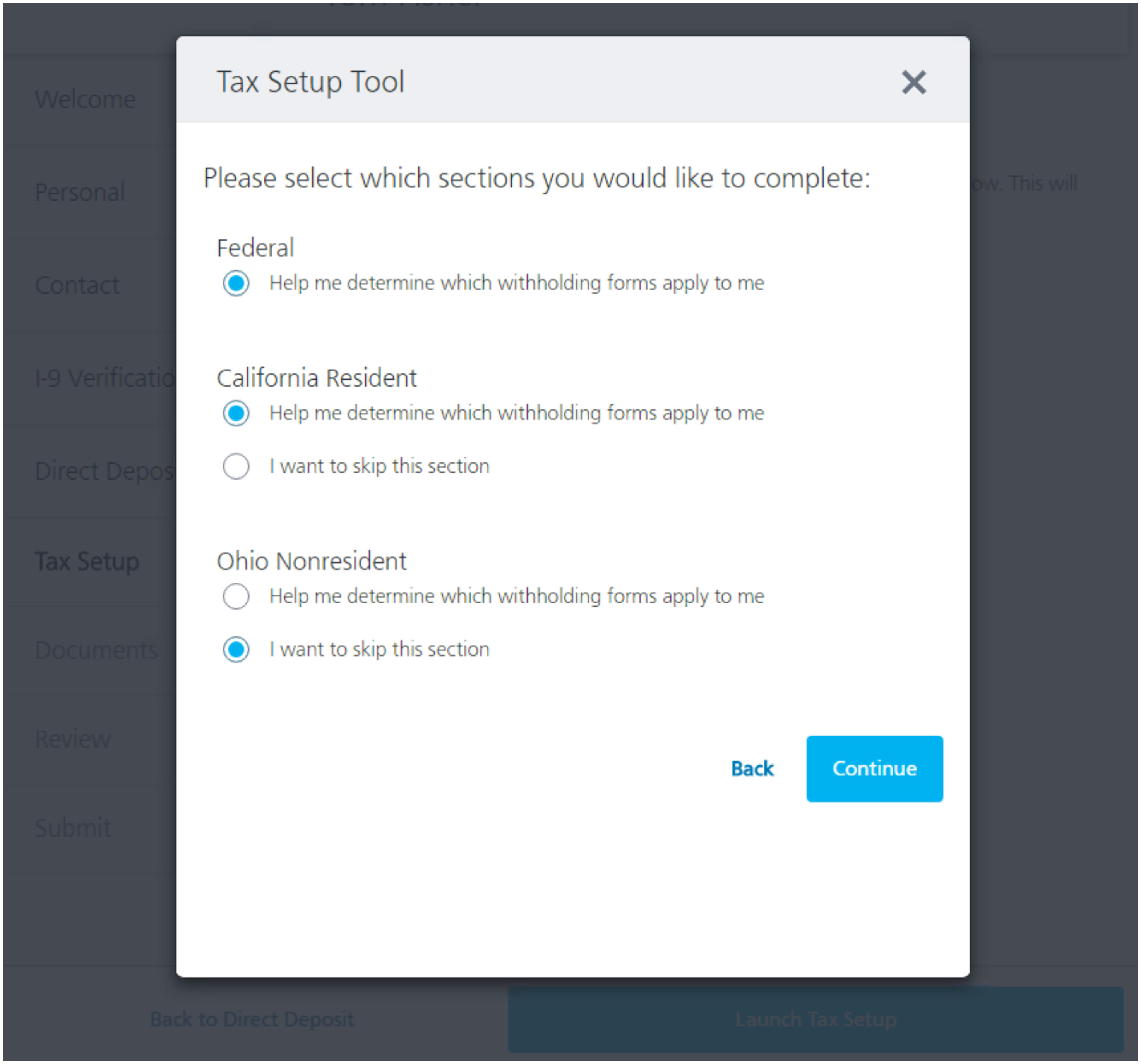
The New Hire Experience

When entering in Direct Deposit bank account information, the Onboarding platform will automatically look up the Bank Name based on the provided Routing Number.



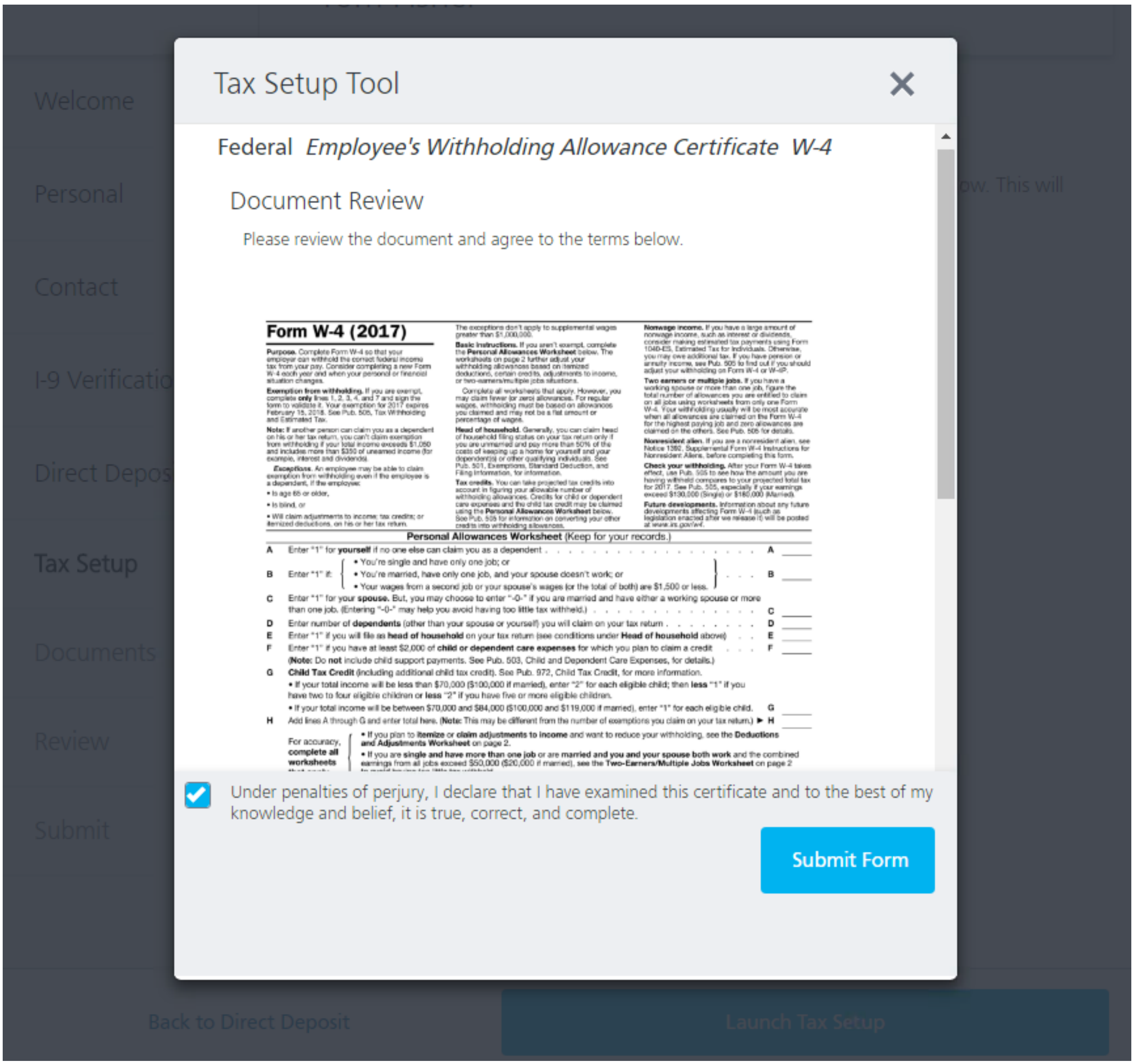
The New Hire Experience

A connected tax form service will dynamically generate the appropriate tax forms based on the the New Hire's Work Location and address, and other supplied responses, prompting the New Hire to complete the required forms.



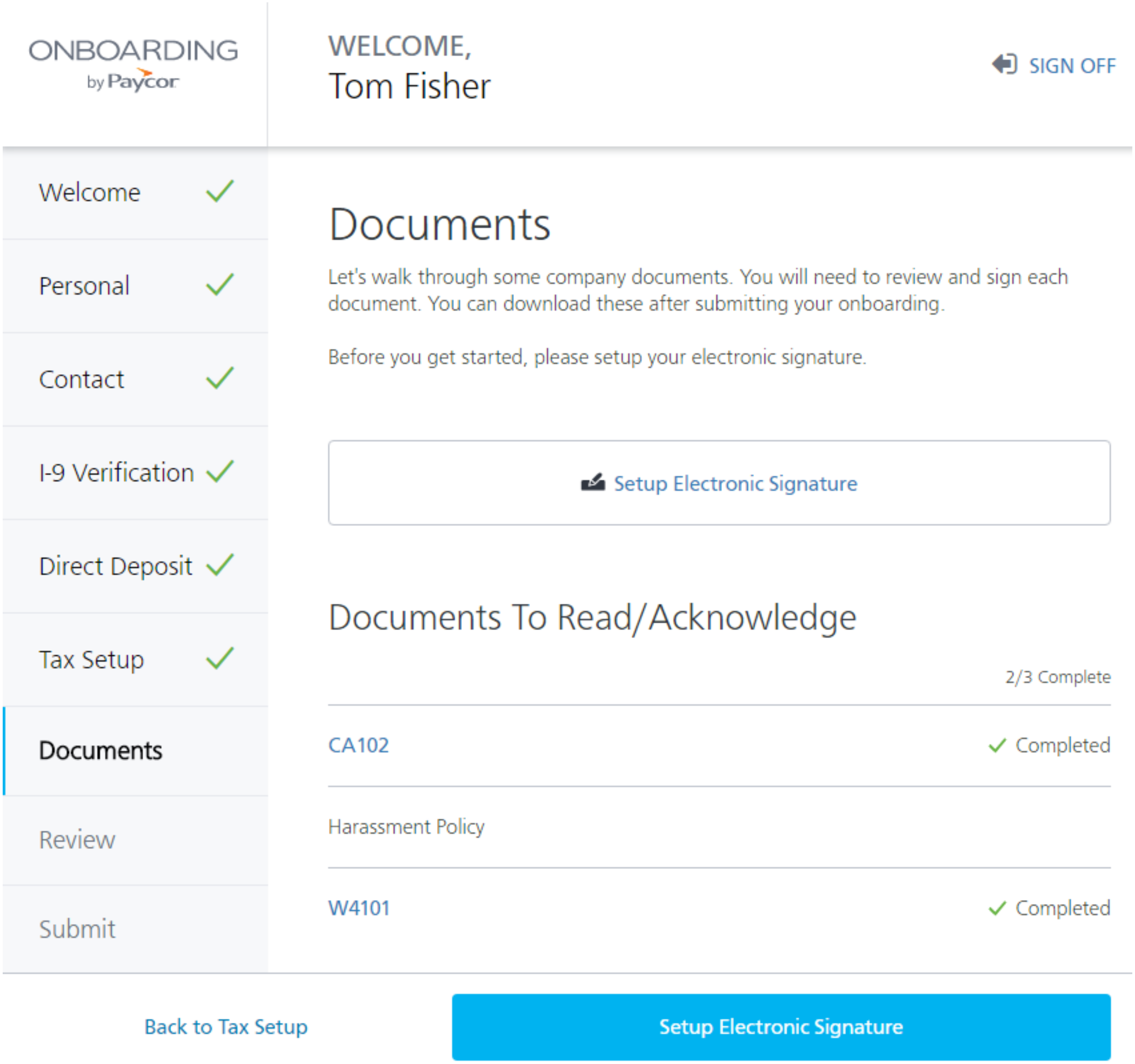
The New Hire Experience

New Hires can review the completed tax forms before submission.



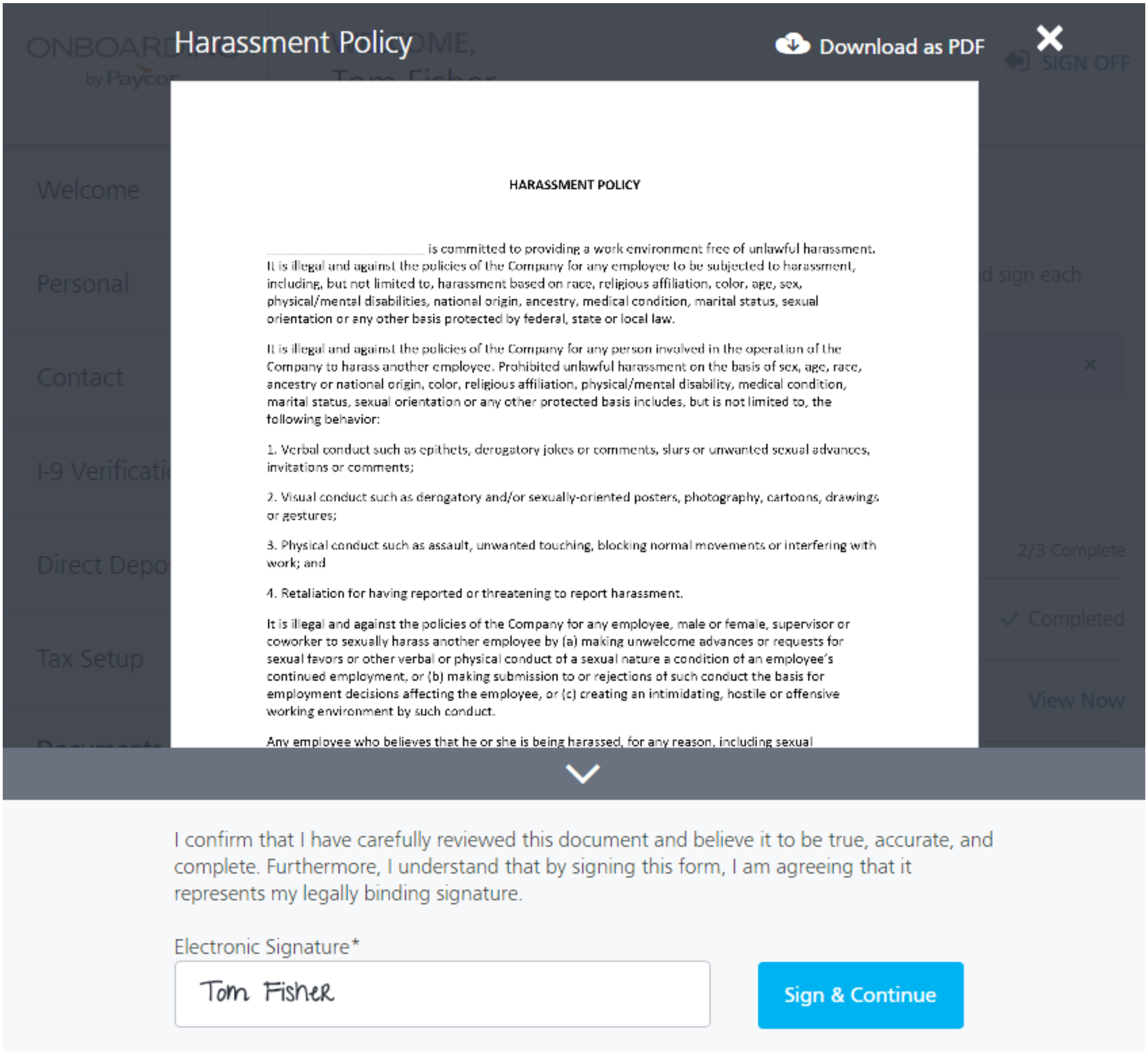
The New Hire Experience

The New Hire can also electronically sign any other required documents associated with the onboarding group.



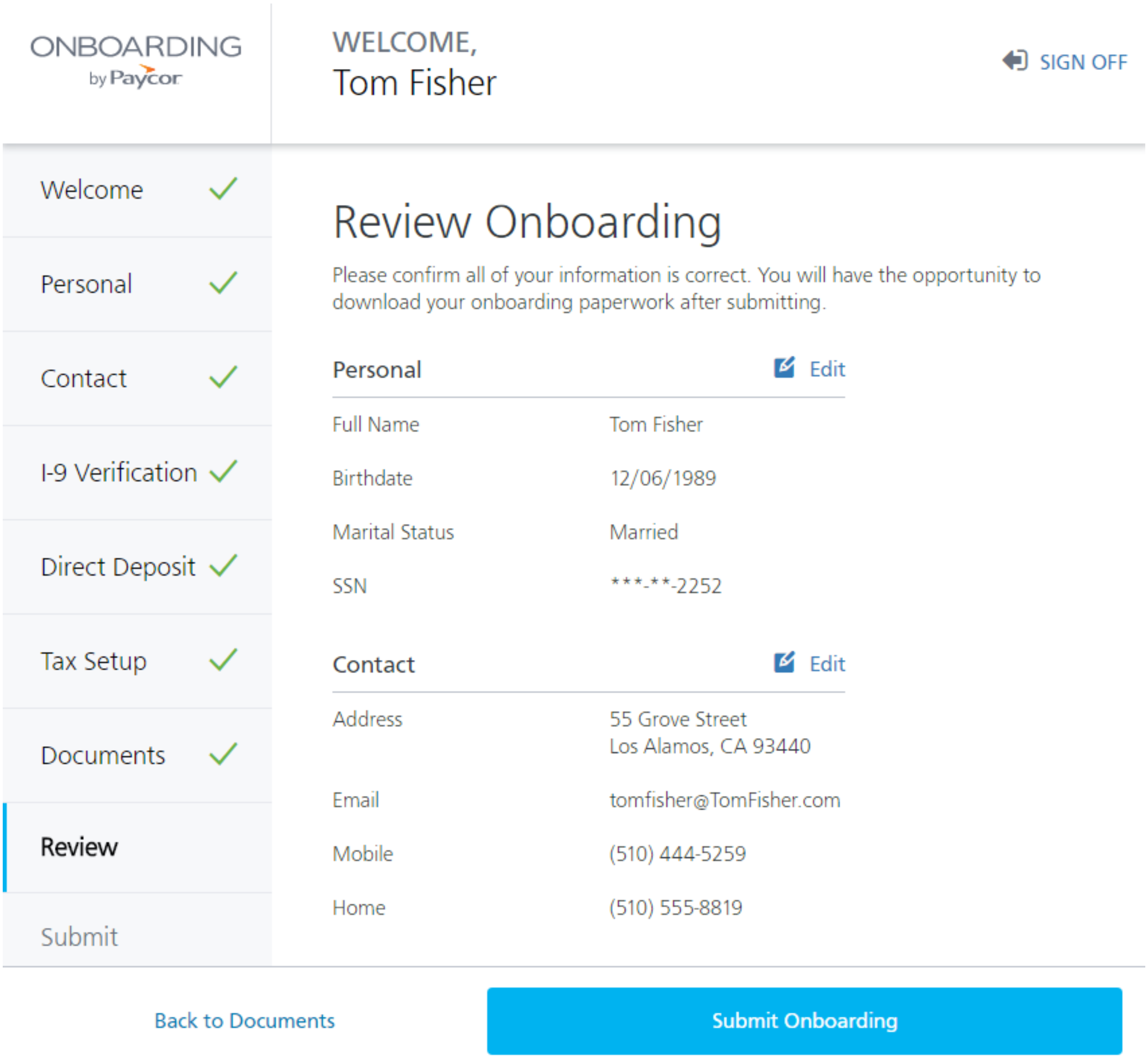
The New Hire Experience

All digital documents are also downloadable as a PDF.



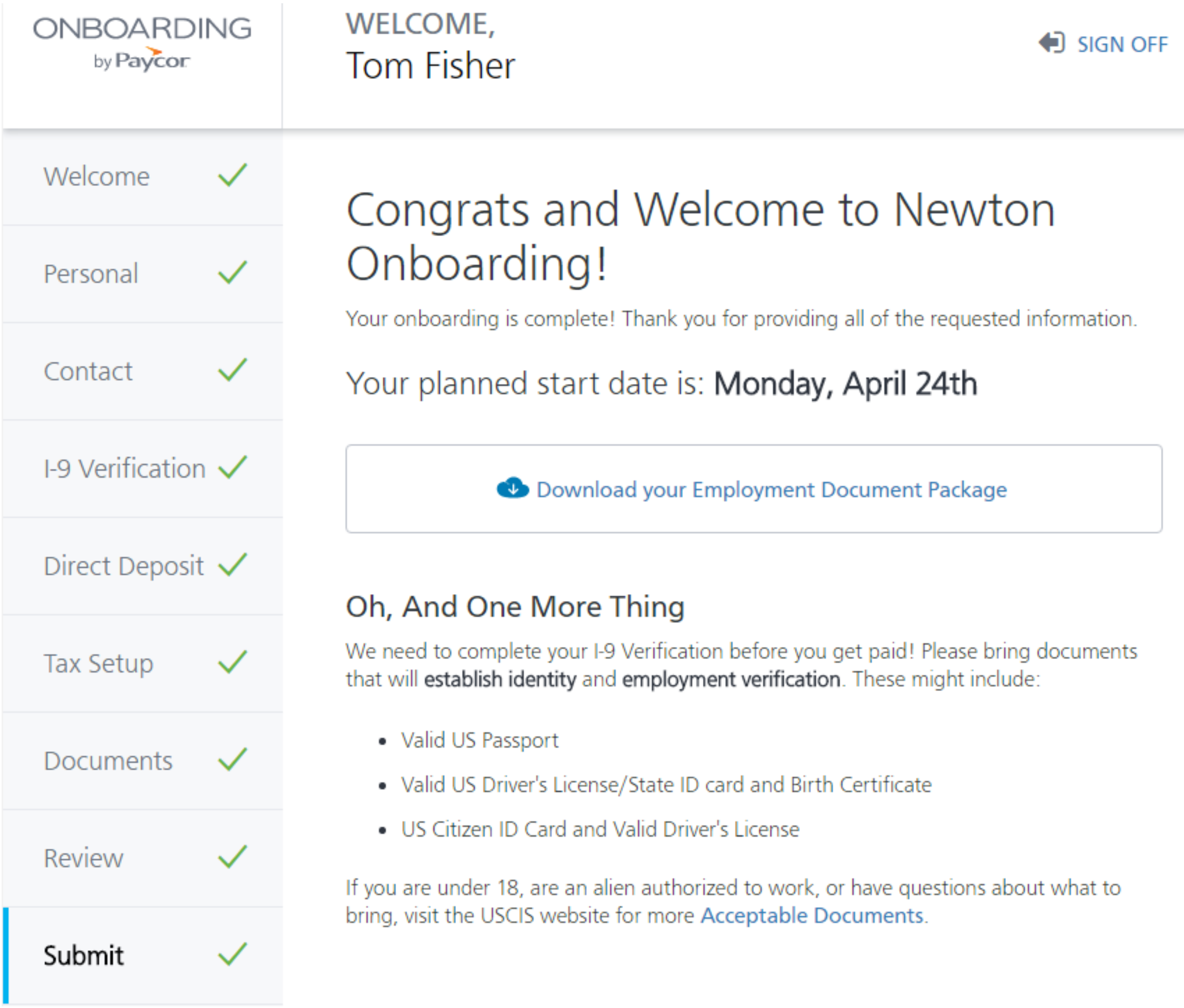
The New Hire Experience

After completing all required fields, the New Hire can review all provided information, making edits as needed, before submission.



The New Hire Experience

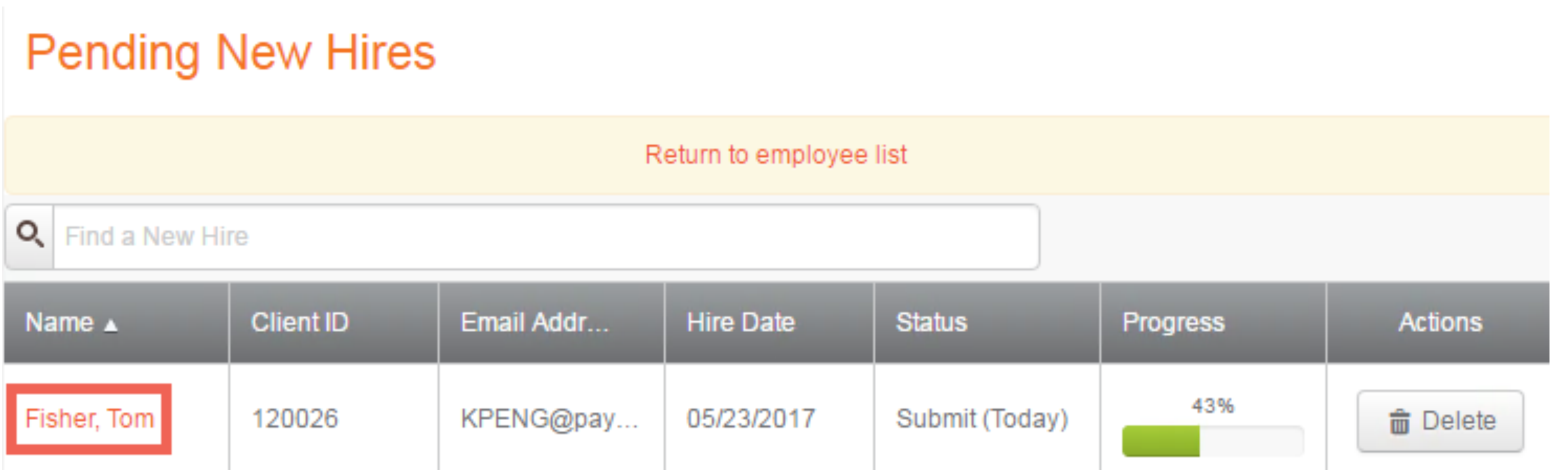
After submitting, the New Hire can download all signed documents. Onboarding will also remind the New Hire to bring in documents establishing identity to complete the I-9 Verification.



Completing Onboarding for New Hire

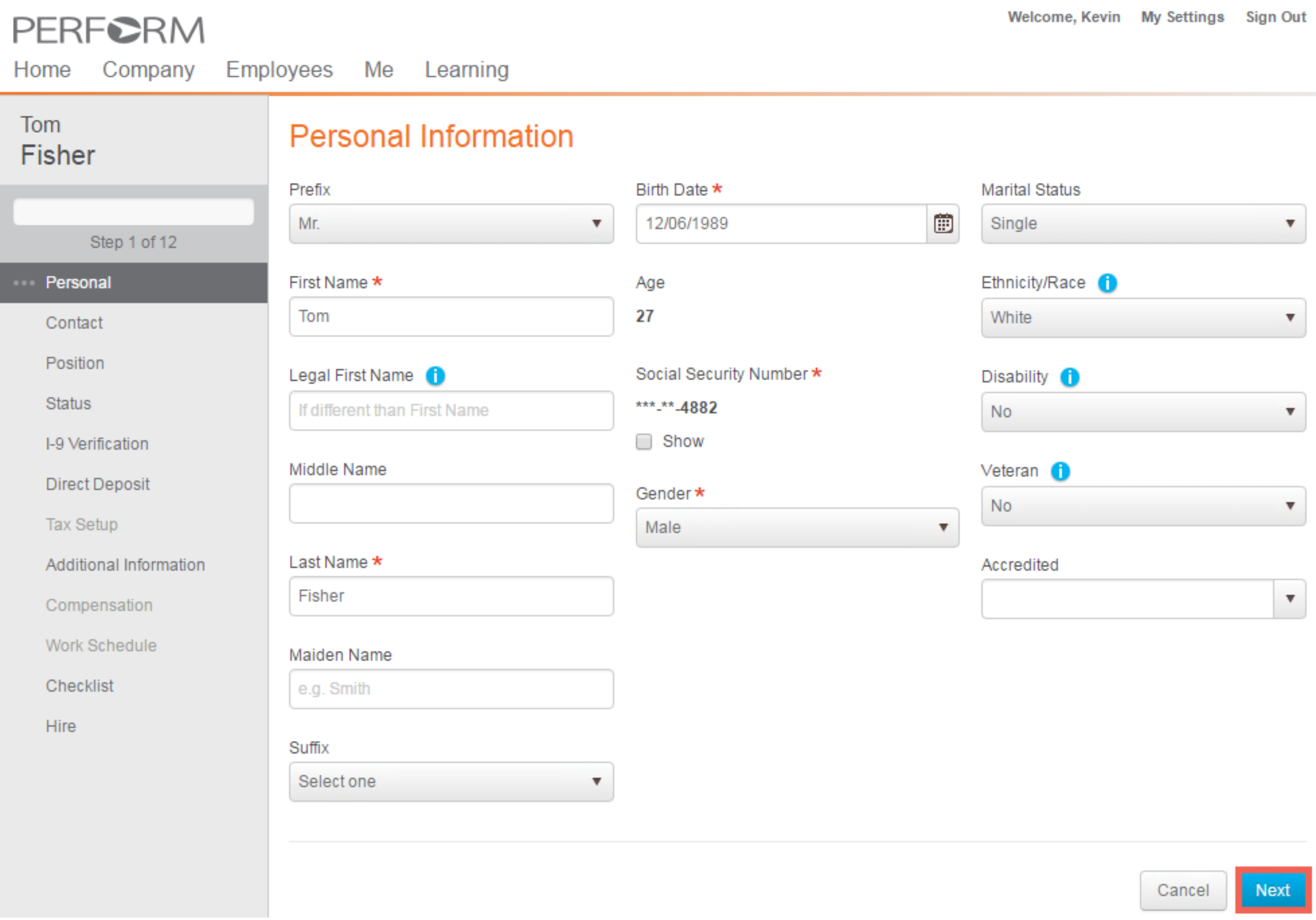
After the New Hire submits his/her Onboarding package, you will receive an email notifying you that there is a pending onboarding package awaiting your review.

Navigate back to the Pending New Hires area, then click into the New Hire's name to continue onboarding this hire.



Completing Onboarding for New Hire

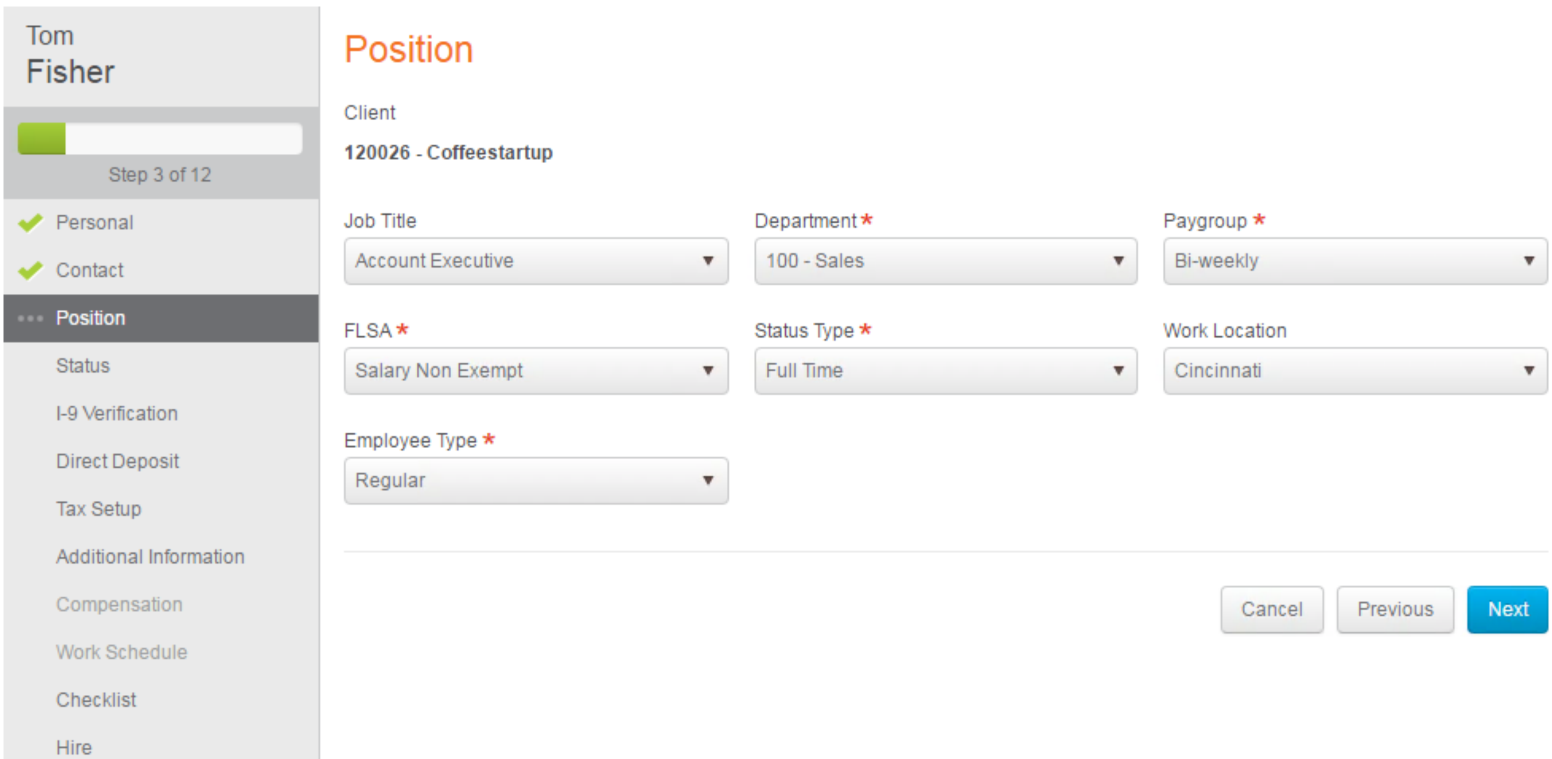
The New Hire’s entries are available for review. As you review, make any adjustments as needed, clicking “Next” to proceed through each page.



Completing Onboarding for New Hire

Certain steps and fields are internal-only, meaning they must be filled out by the Onboarding admin rather than the New Hire.

For example, the Position step requires that an Onboarding Admin specify FLSA status, Department, Pay Group, etc.. This was an internal step *not* visible to the New Hire.

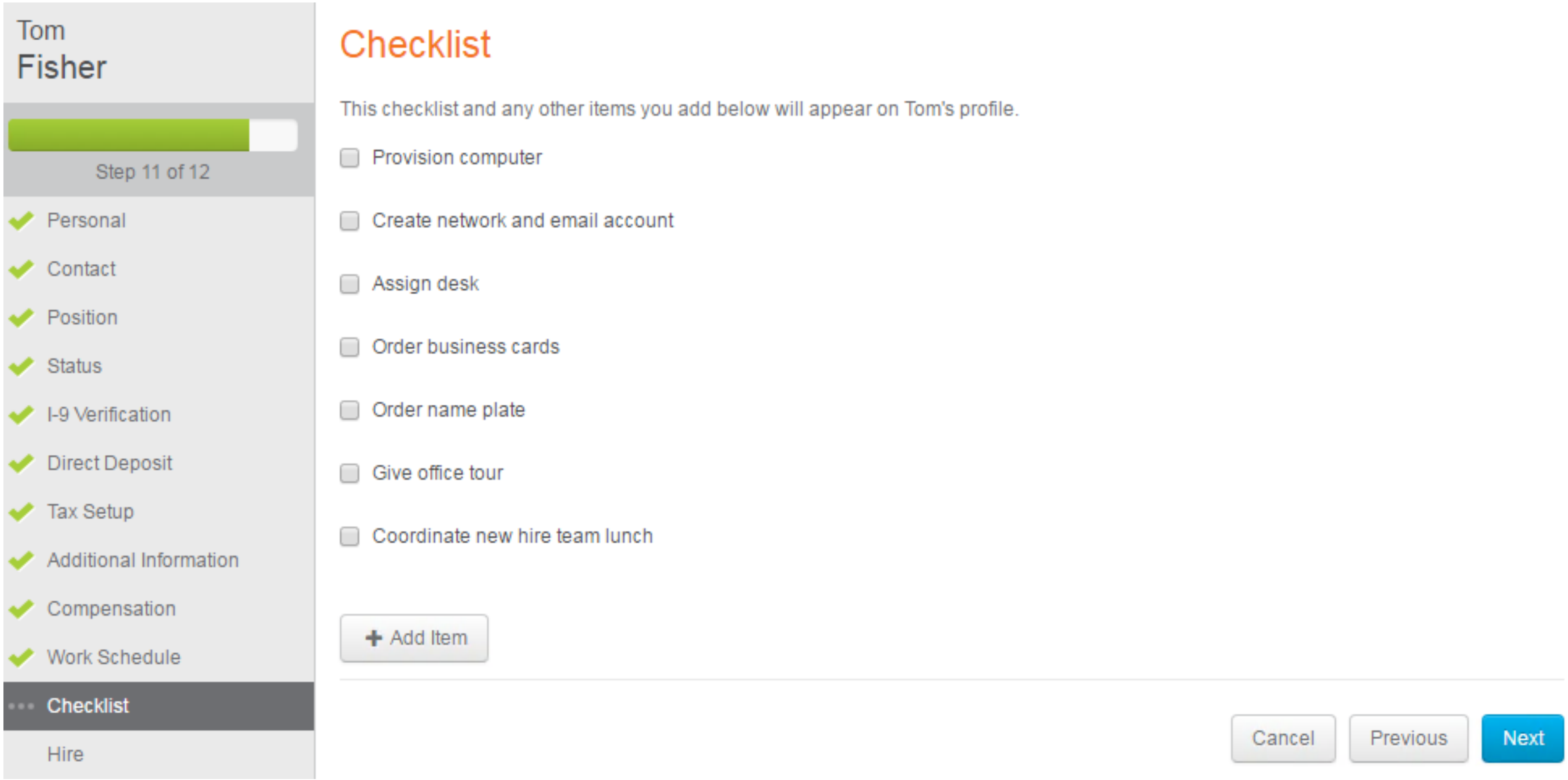


Completing Onboarding for New Hire

The Checklist is another internal-only step designed to help you track the completion of any tasks or items related to this New Hire's onboarding.

For instance, you might use this to track the provisioning of an email account and new computer.

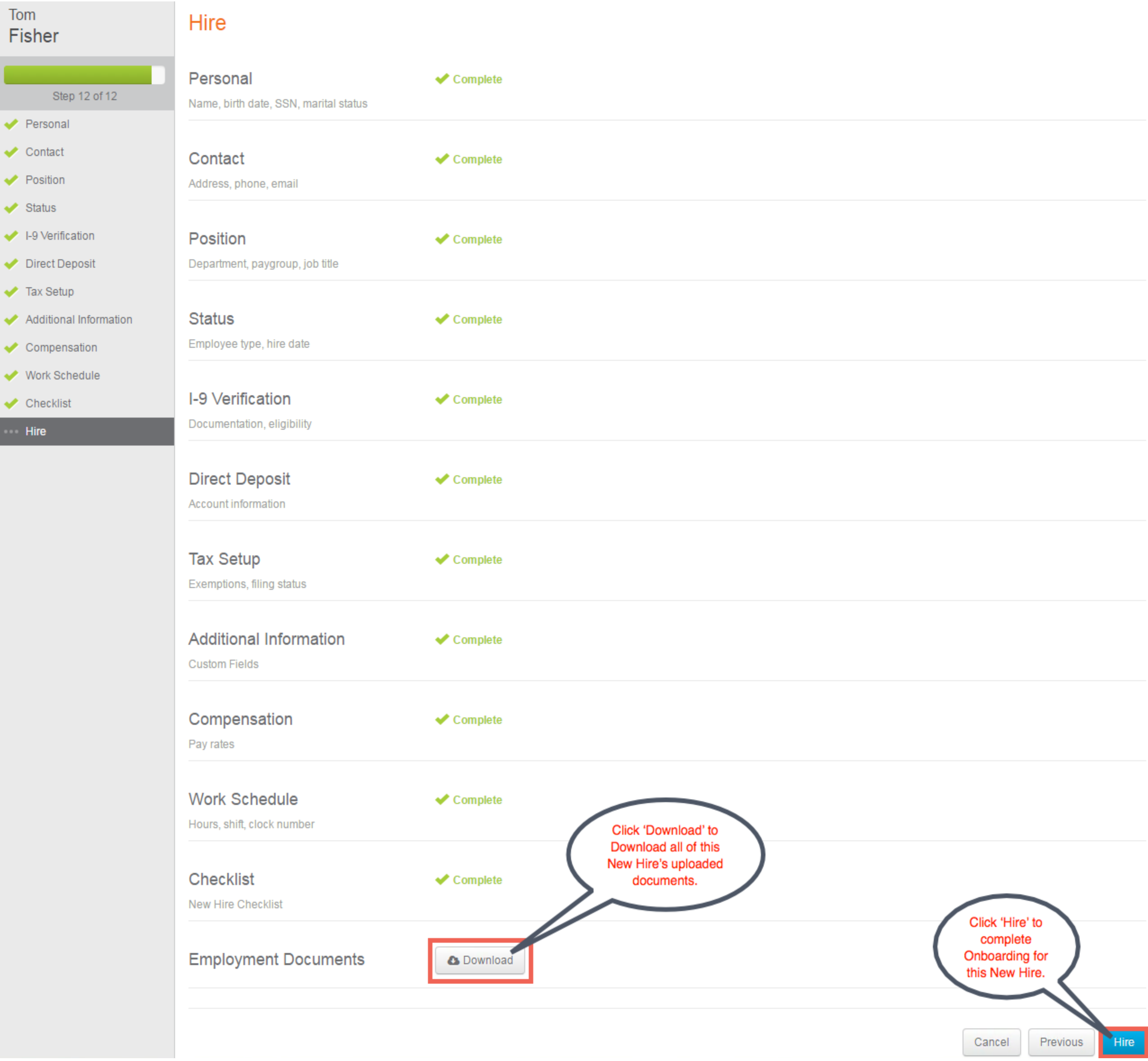
Onboarding Admins can also add new items to this checklist on-the-fly by clicking the "Add Item" button. Items added in this way affect *only* this specific New Hire.



Completing Onboarding for New Hire

The final step allows you to review all information pertaining to this New Hire. At this point, you can download a .zip containing all of this New Hire's documents.

Click the "Hire" button to officially complete Onboarding for this New Hire.

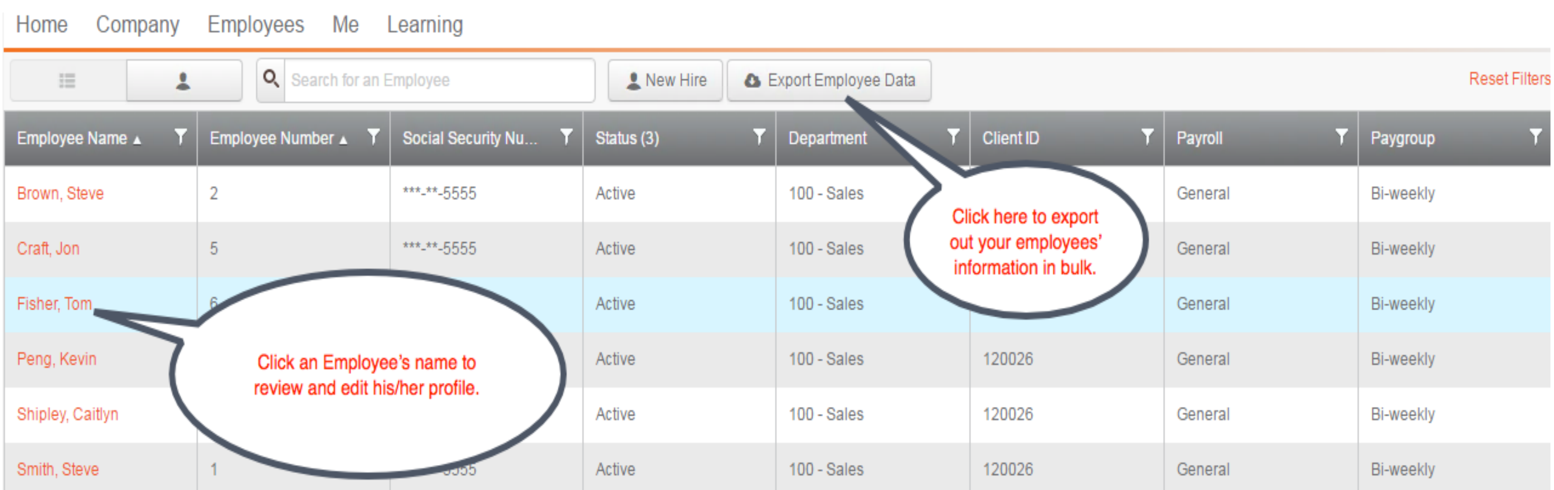


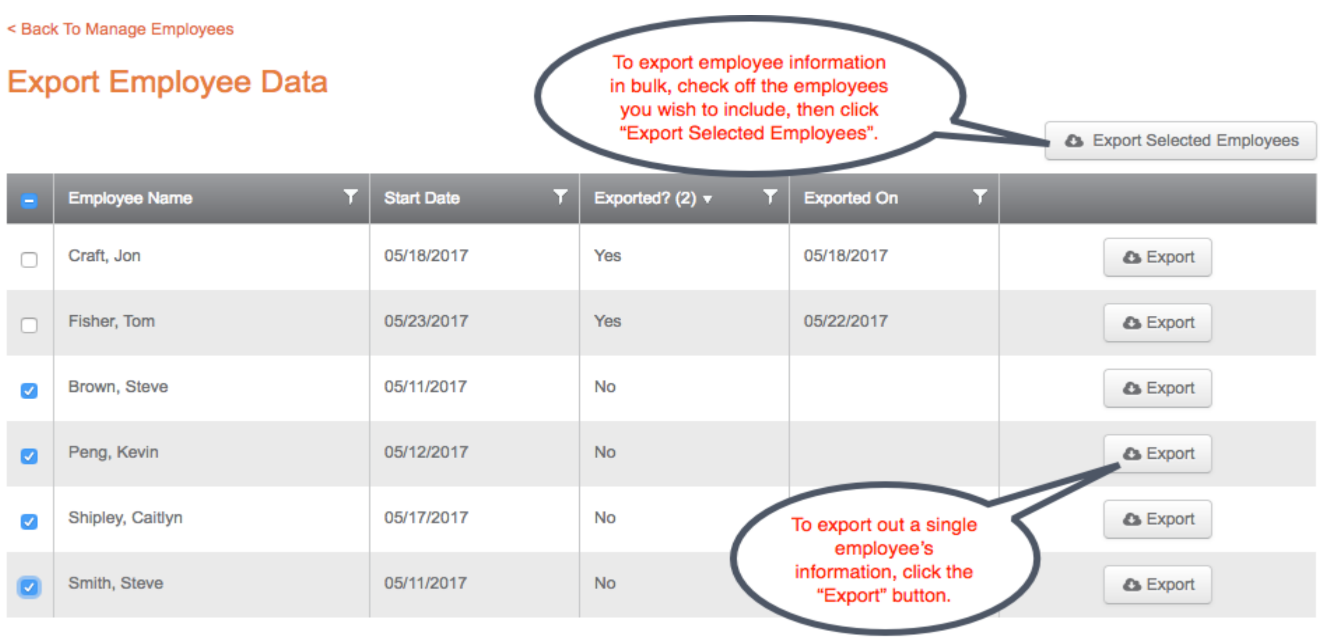
Completing Onboarding for New Hire

After completing Onboarding for a New Hire, the New Hire is moved from the Pending New Hires area into the Active Employees list, accessed by clicking Manage Employees.

From here, you can export out employee data in bulk (in spreadsheet format) by clicking the "**Export Employee Data**" button.

You can also review and edit Employee Profiles by clicking into the Employee's name. The Employee Profile consists of all fields from the Onboarding process, including the Checklist.



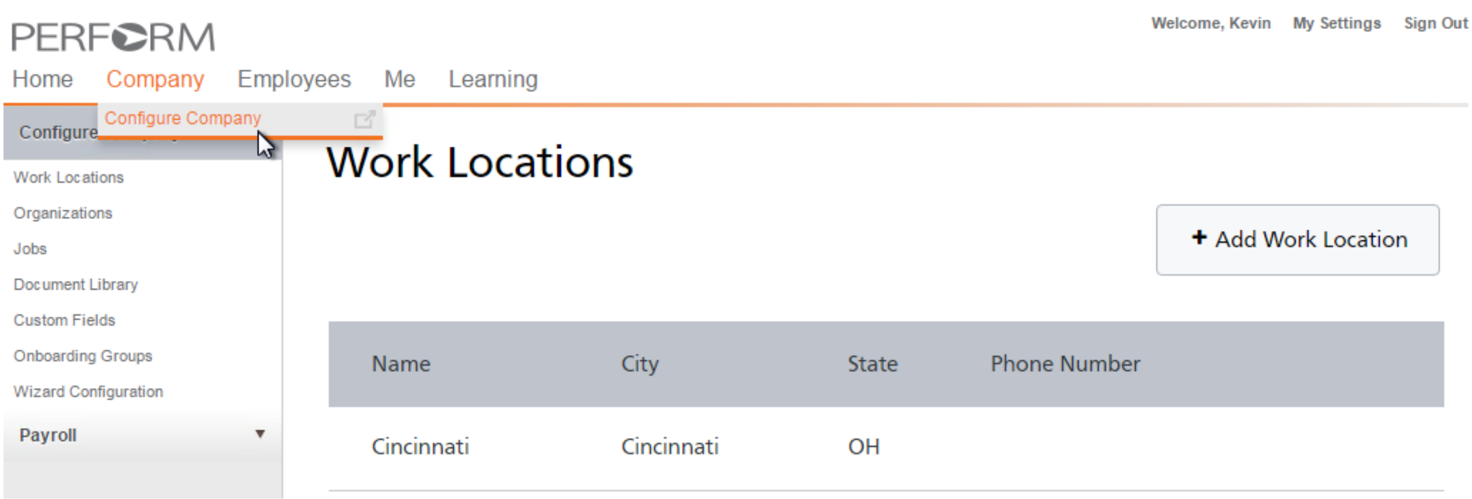


Onboarding Configuration

Admin Configuration

After going live with Onboarding, admin access will be provided to your Onboarding platform. While Newton will handle the initial configuration, you are free to make any changes as needed. The following section will walk through changing your Onboarding configuration.

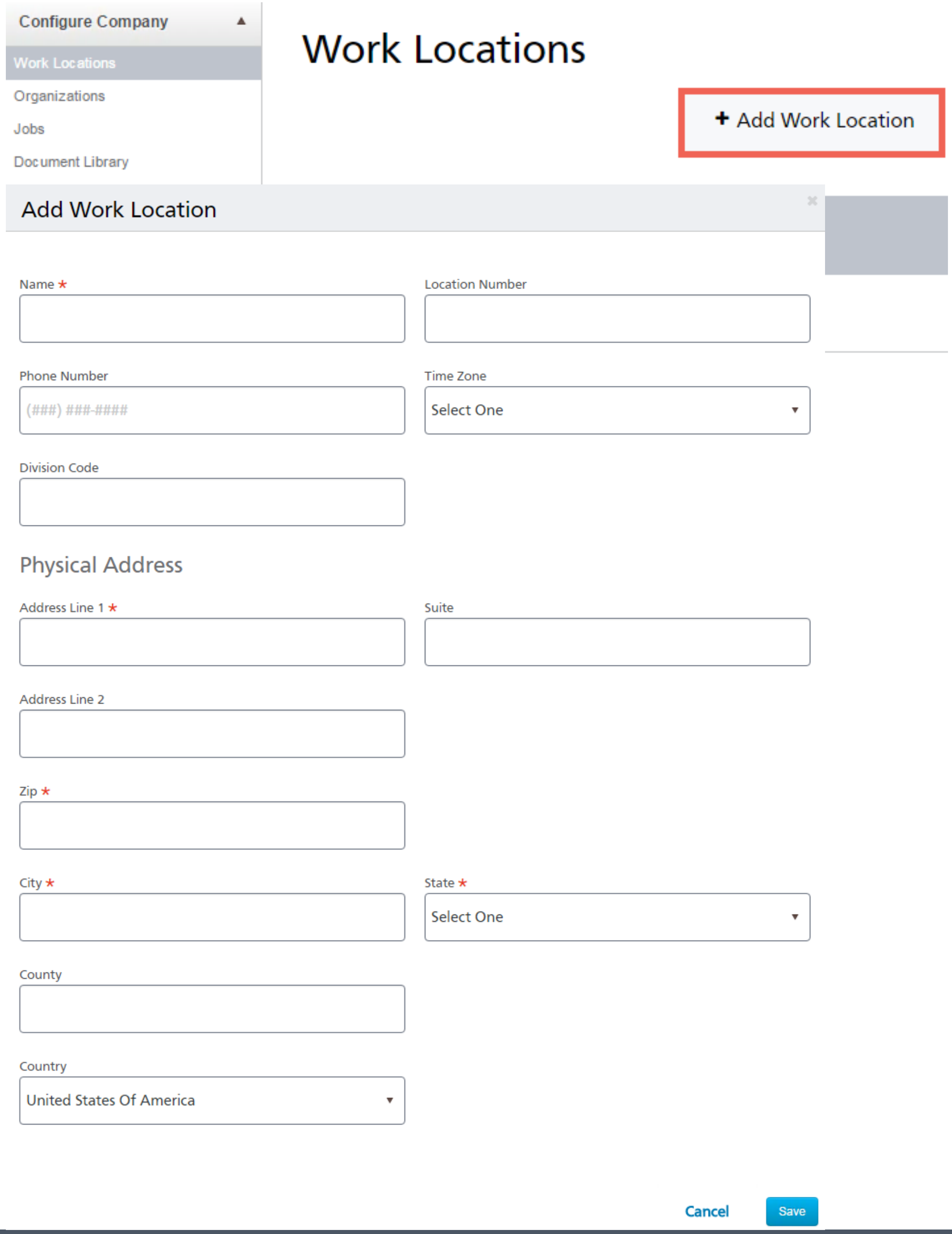
To access your organization's Onboarding configuration, click into the "**Configure Company**" menu item. Settings are grouped on the left hand side.



Admin Configuration

Work Location:
Add, edit, and remove Work Locations associated with your organization.

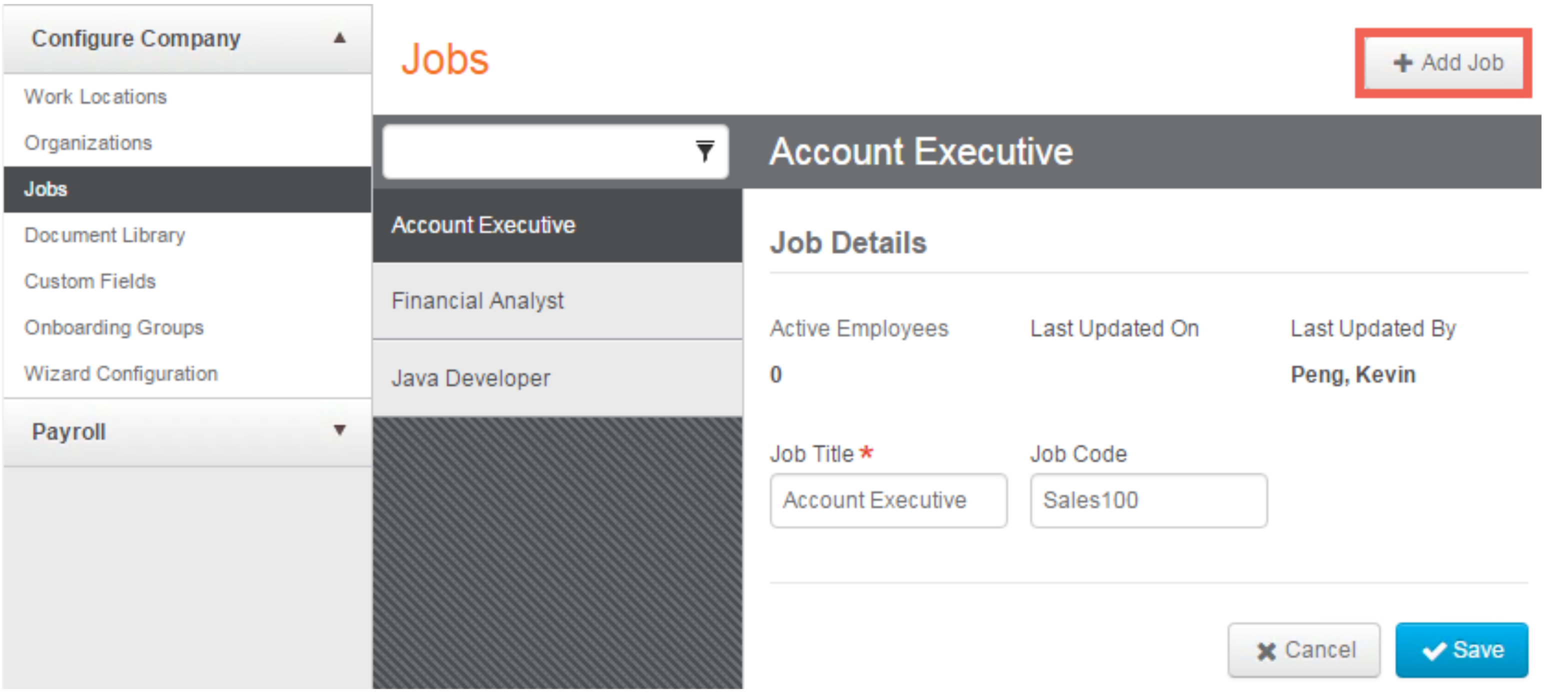
- A Work Location is selected when initially inviting a new hire to onboard.
- The Work Location determines the tax forms presented to the New Hire during the onboarding process.
- If no Work Location is selected, the tax form defaults to the organization's legal address.



Admin Configuration

Jobs:
Customize the library of internal job titles that can be linked to New Hires.

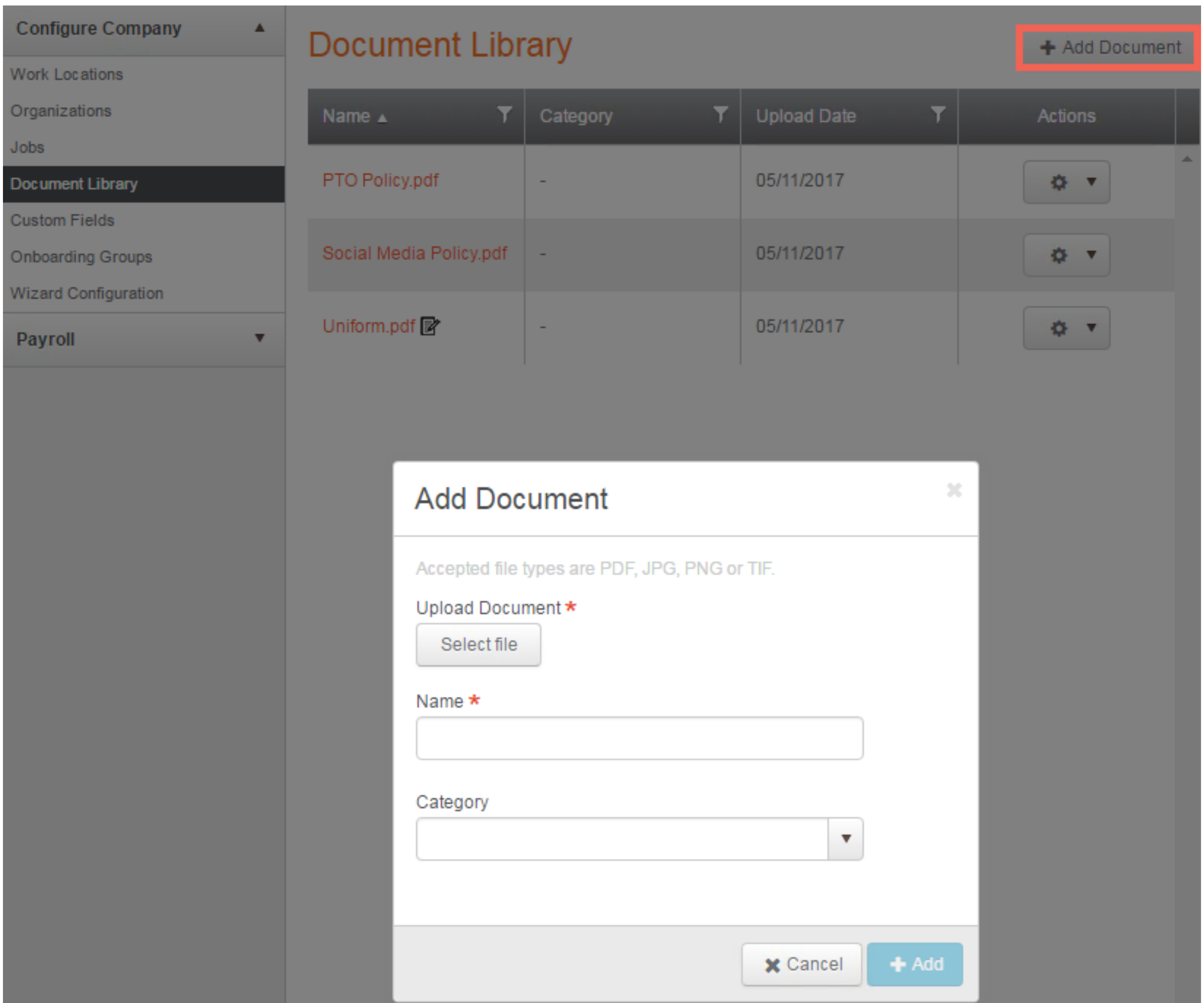
- (Optional) Set up Jobs in Onboarding if you wish to have new hires grouped into specific job titles. This will not affect the Candidate and Job record associated with the new hire in Newton ATS.
- During an export, if the Newton job title matches perfectly with an Onboarding job title, the New Hire will automatically be linked to the job.



Admin Configuration

Document Library:
Customize the library of documents that may need to be viewed and signed off by a New Hire. From this library, choose the specific documents that apply to a New Hire through Onboarding Groups.

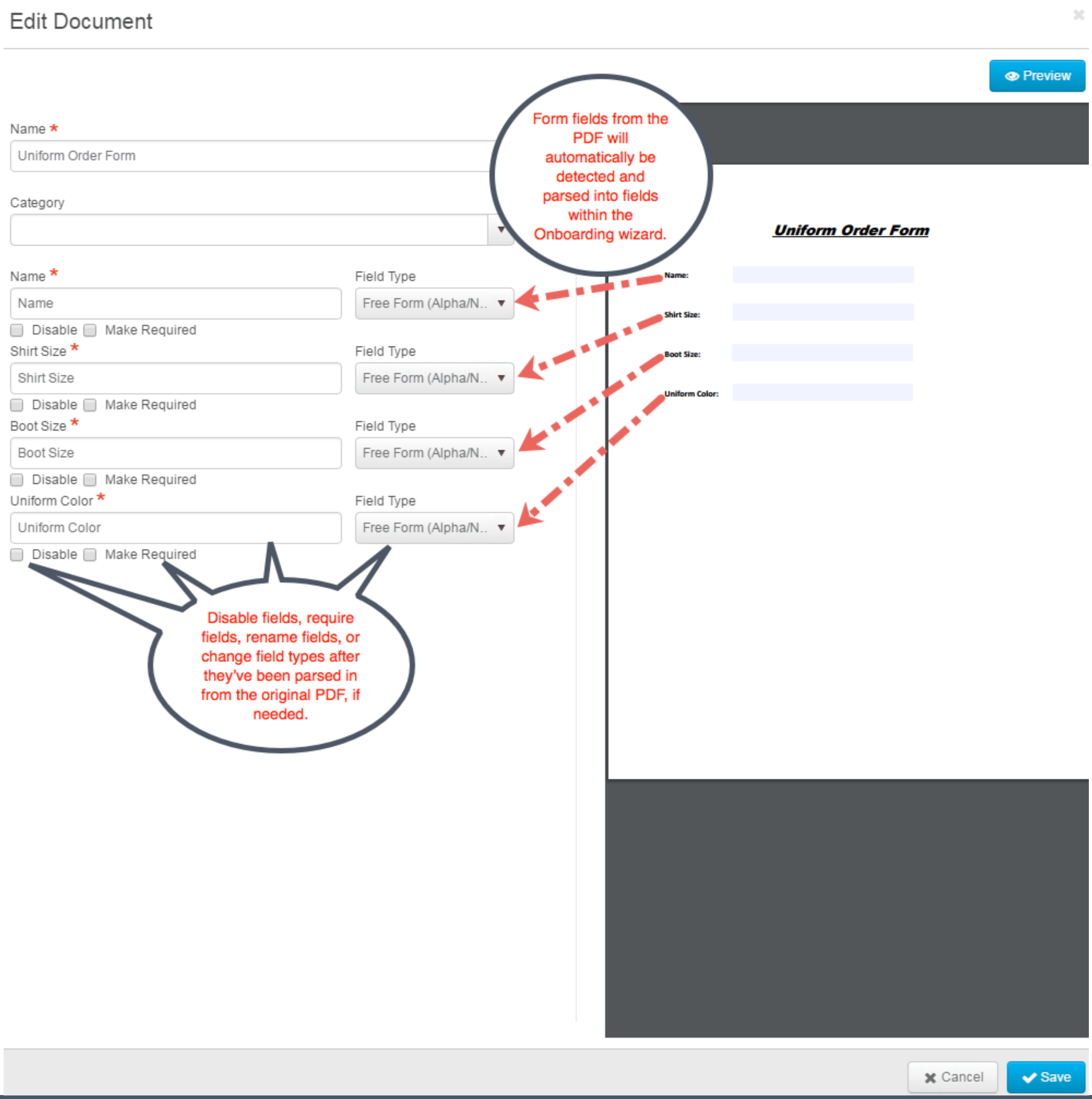
- Supports fillable PDFs. Fillable PDFs will appear as a form in the Onboarding Wizard, allowing New Hires to fill out the open fields from the PDF *and* electronically sign the document. Non-fillable PDFs, or image files, can *only* be electronically signed.
- Example documents: Employee handbook, company policies, etc..
- Accepted File Types: PDF, JPG, PNG, TIF. 100 file max per category.



Admin Configuration

Document Library – Uploading a Fillable PDF:
When uploading a fillable PDF, the Onboarding platform will automatically identify the form fields to be filled out.

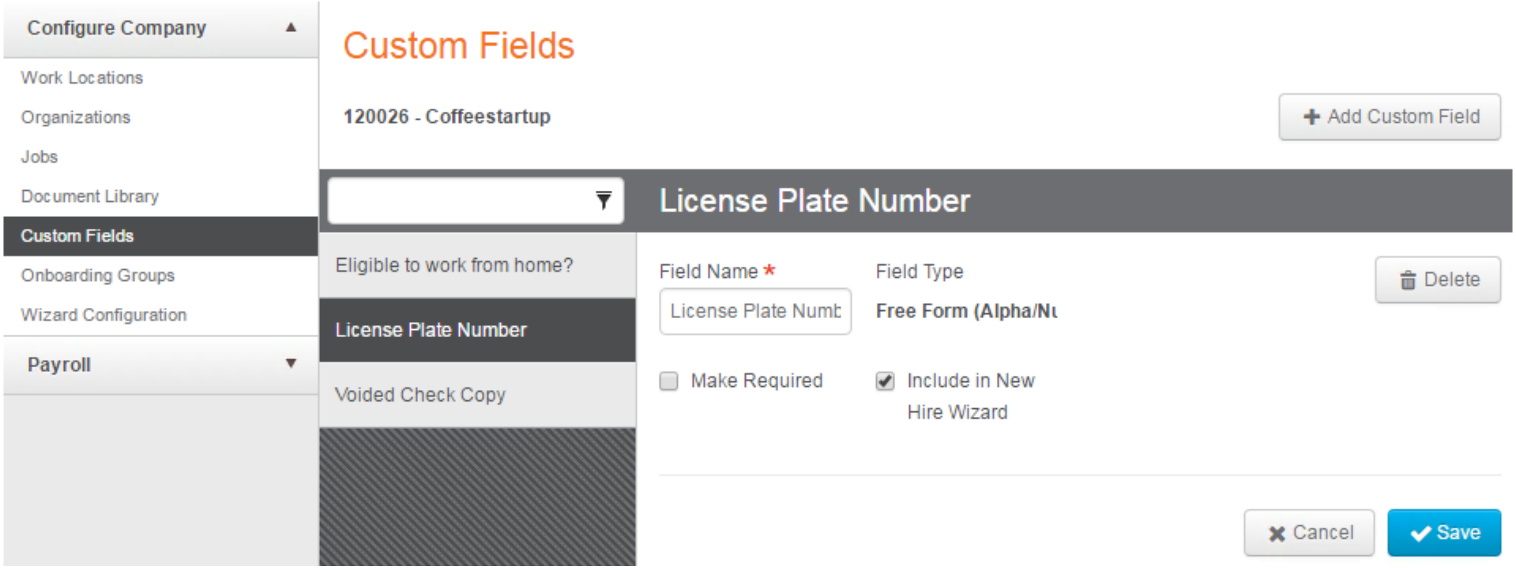
- Rename and disable/require fields, and customize field types as needed.
- Responses will file back into the original PDF form, which is viewable as an document upload on the New Hire's employee profile.

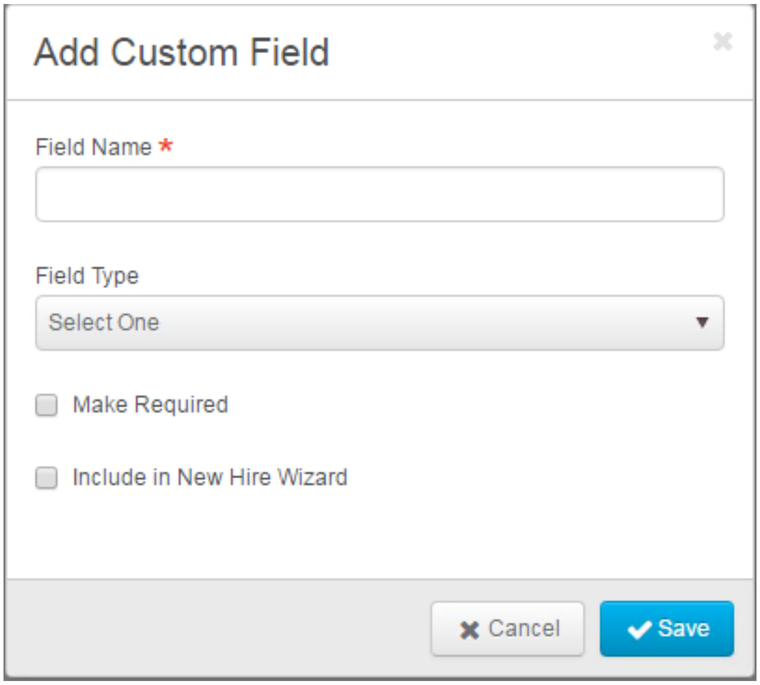


Admin Configuration

Custom Fields:
Create Custom Fields to collect & track miscellaneous information regarding the New Hire that may impact the onboarding process.

- Build a set of Custom Fields from a variety of field types, and choose whether you want to make the field required.
- Check the “Include in New Hire Wizard” option if you want the field to be filled out by the New Hire. If unchecked, only the Onboarding Admin(s) will be able to view and fill out the Custom field.

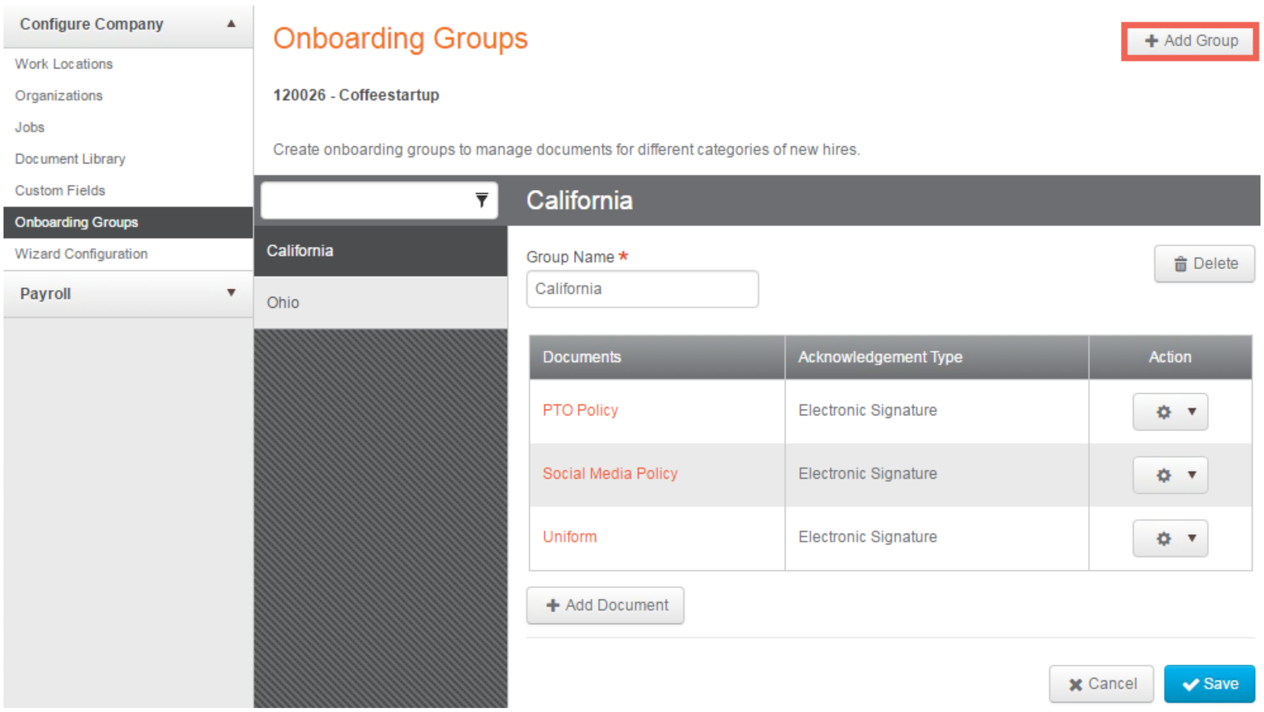


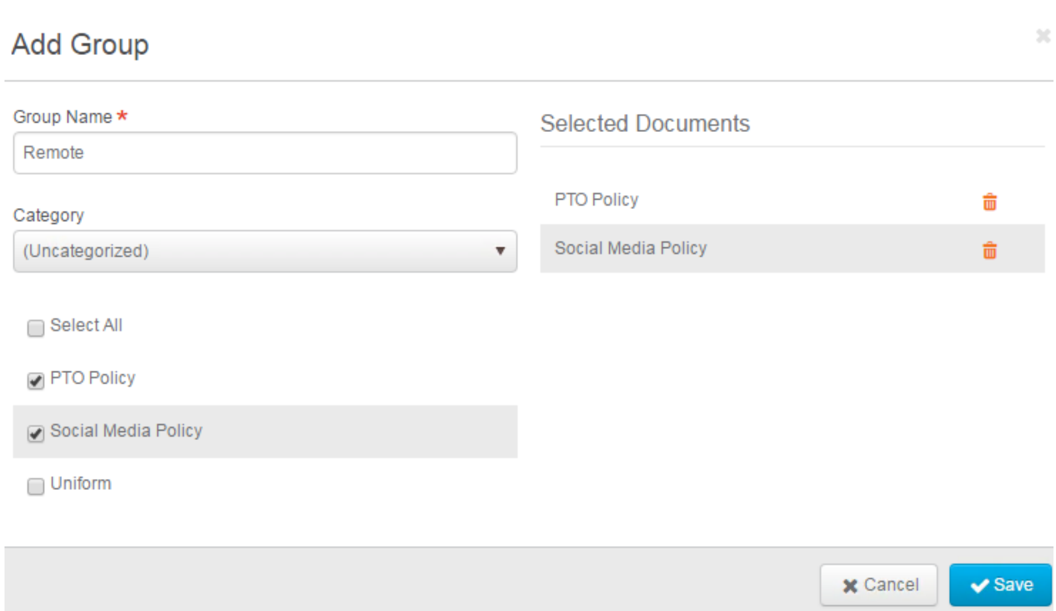


Admin Configuration

Onboarding Groups:
Before a New Hire can be invited to onboard, they must be placed in an Onboarding Group. Onboarding Groups determine the specific documents (from the Document Library) that must be filled out and signed off on by the New Hire.

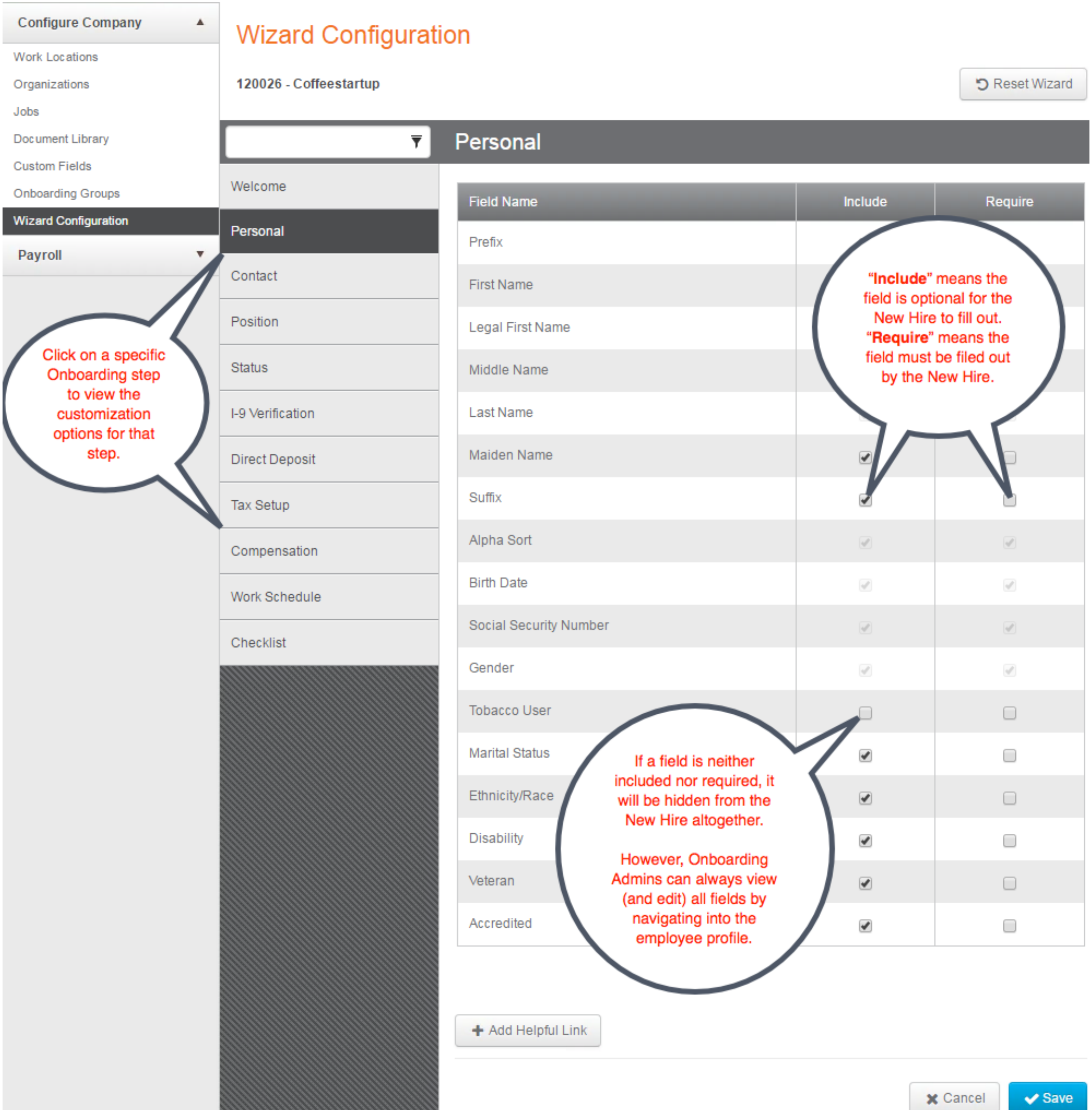
- Create an Onboarding Group by clicking "+Add Group", then select the documents to be signed off on by New Hires placed in this Onboarding Group.
- Generally, Onboarding Groups are based on Location and/or Job Function.





Admin Configuration

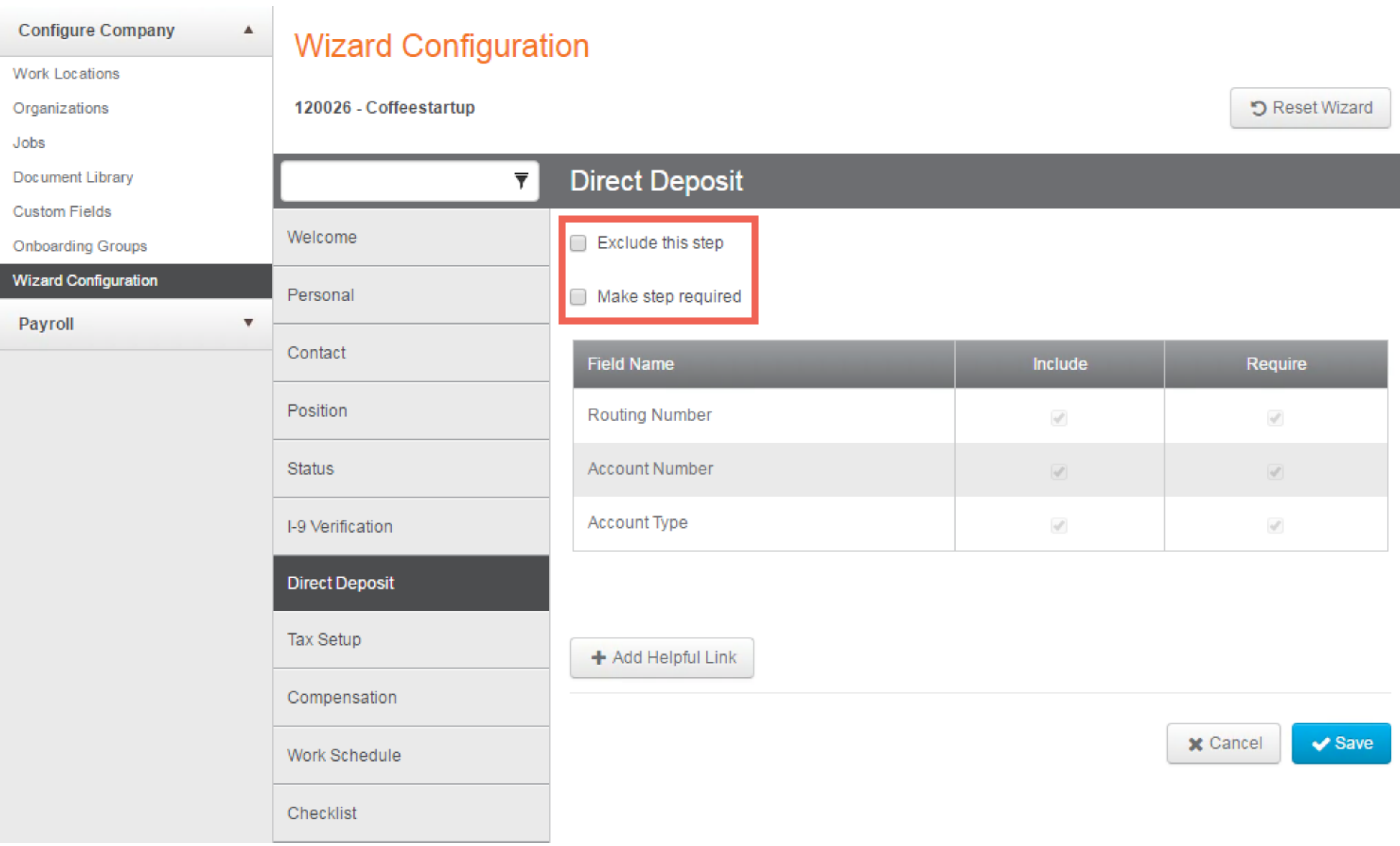
Wizard Configuration:
Customize the Onboarding Wizard used by New Hires, including exposing/hiding certain steps and making fields required/optional.



Admin Configuration

Wizard Configuration:
Certain steps can either be required, optional, or excluded from the Onboarding Wizard depending on their relevance for your organization.

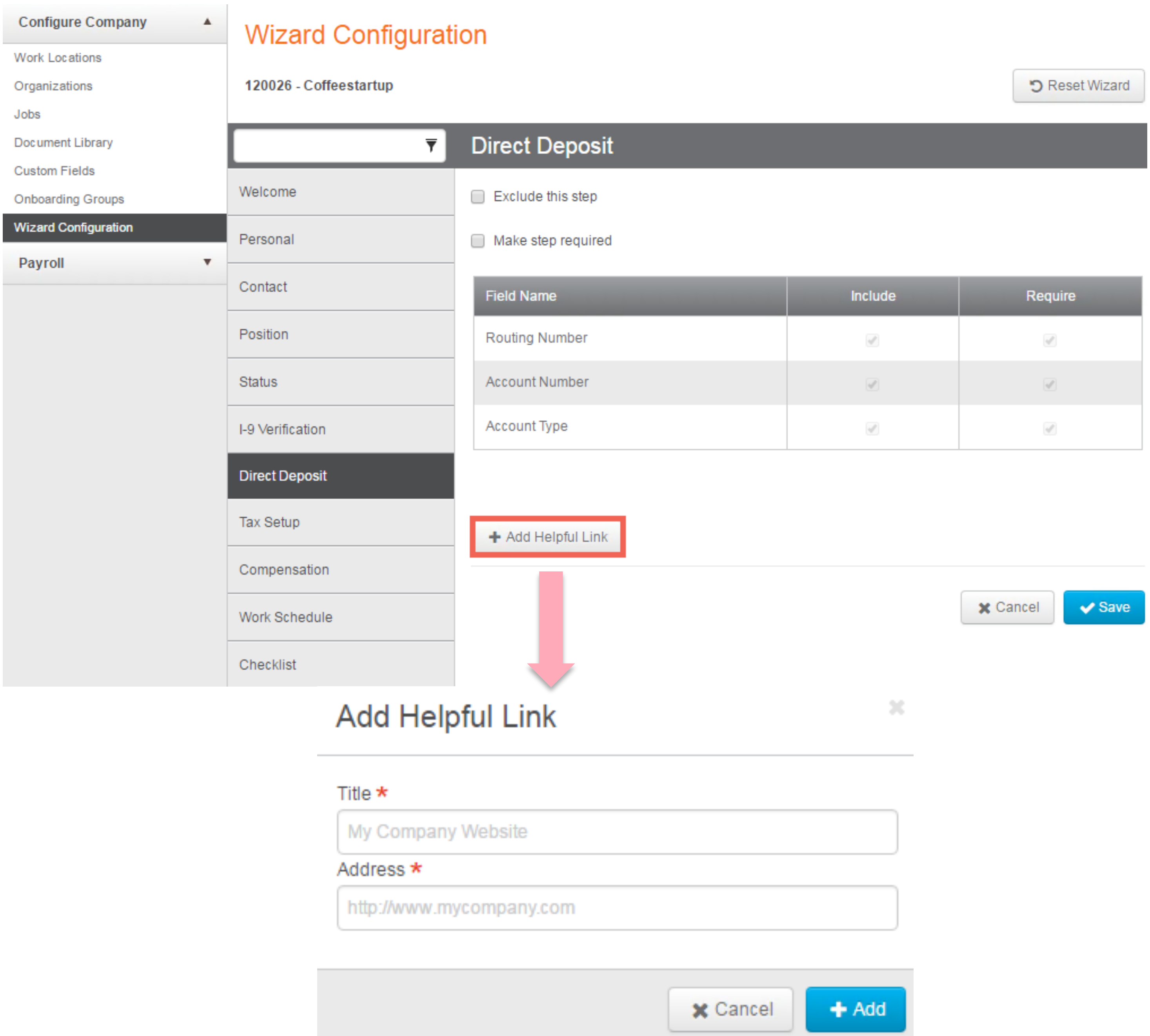
- Check “**Exclude this step**” to bypass this step in the wizard altogether.
- Check “**Make step required**” to force New Hires to complete the step.
- If both are left unchecked, the New Hire will see the step but has the option to skip past it.



Admin Configuration

Wizard Configuration:
Links to other webpages can also be added for each step, through clicking the "**Add Helpful Link**" button.

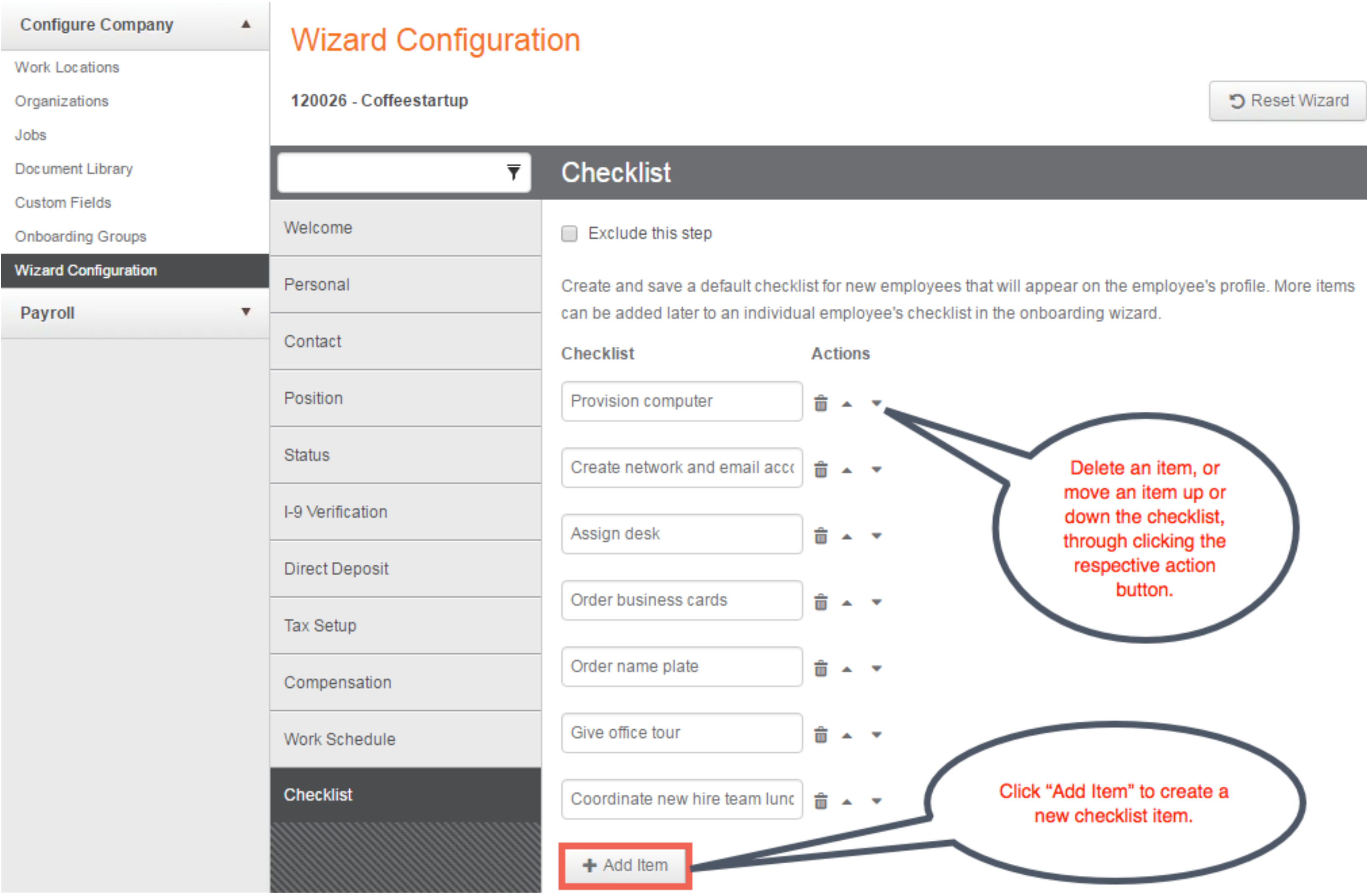
- Generally, this is used to link the New Hire out to a page providing supplementary information.
- For instance, the Direct Deposit step can have a link added that provides instructions on where to find account and routing numbers.



Admin Configuration

Wizard Configuration:
An Onboarding "Checklist" can also be setup from the Wizard Configuration. This is an internally-accessible checklist (New Hire will not see this checklist), meant for tracking any items that should be handled as part of a New Hire's onboarding.

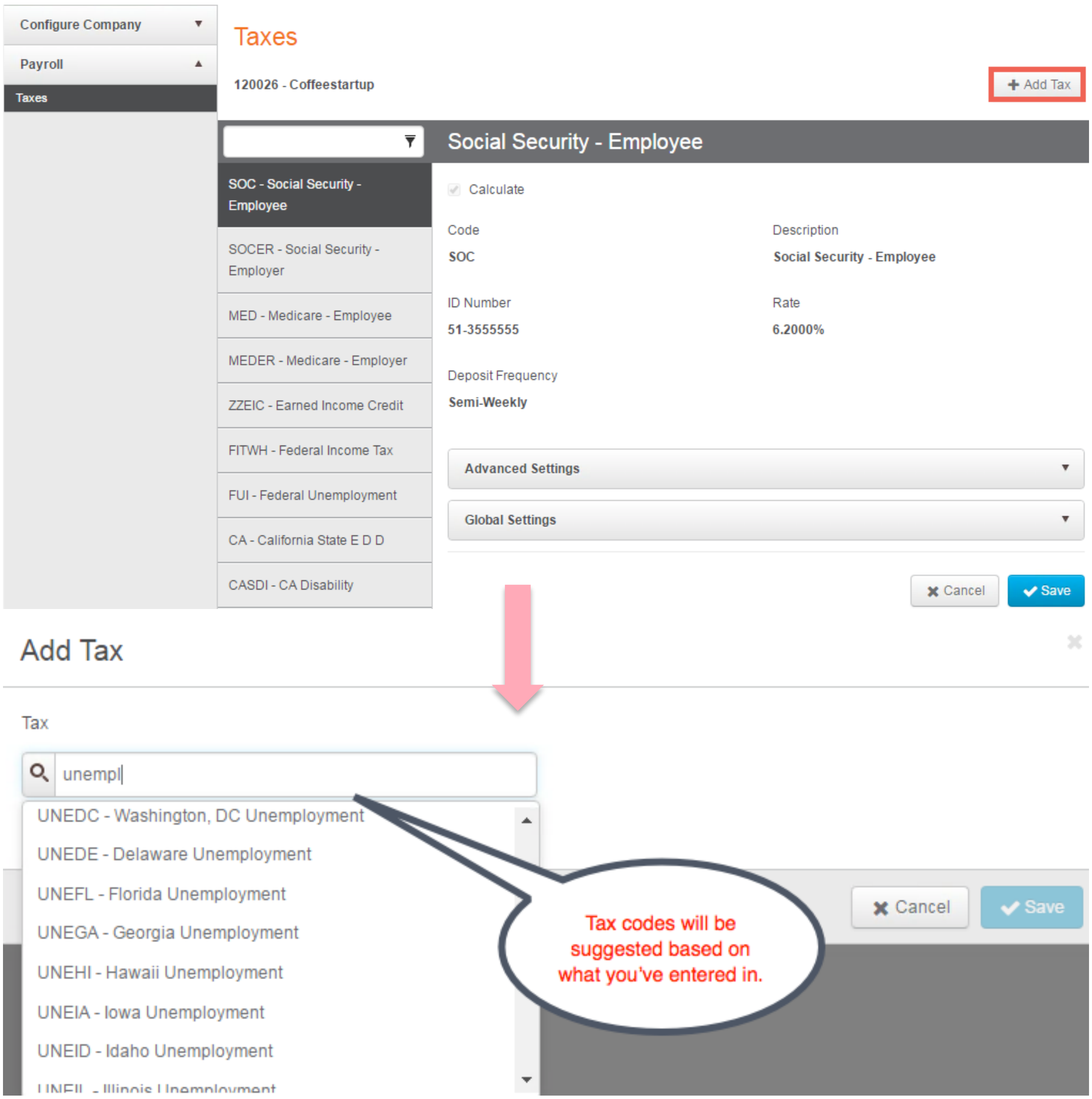
- Admins can view this checklist by navigating into the New Hire's employee profile.
- If you do not wish to use the checklist, select the "Exclude this step" checkbox.



Admin Configuration

Taxes (under Payroll):
Click “Add Tax” to enter in any Tax Codes that pertain to your organization’s employees. These determine the tax forms that will be filled out.

- Federal codes are provided by default, but State and State Unemployment Tax Codes should be added for any states that your organization hires in.
- Example: If a company is headquartered in Ohio, but also hires people in California, Colorado, and Indiana, set up state taxes for OH, CA, CO, and IN, and set up unemployment only for Ohio.



FAQ (Frequently Asked Questions)

Is there a limit to how many Onboarding Groups I can create?

There is a limit of 100 Onboarding Groups per *category*. If you need to create more than 100 Onboarding Groups, you will need to split them up into categories. Categories are created as part of the Onboarding Group creation process– to create a new category, simply type in the name of the Category you wish to create in the Category field.

Is there a limit to how many documents I can add to the Document Library?

There is a limit of 100 documents per *category*. If you need to upload more than 100 documents, they will need to be split up into categories. A category can be created or selected when uploading a document.

On a related note, each Onboarding Group can hold up to 100 documents total.

Can I customize the logo and branding on the registration email or registration pages?

No, it is currently not possible to add your own custom branding. If this is something that would interest you, please let our Support team (support@newtonsoftware.com) know.

On a related note, the “Welcome Page” within the Onboarding Wizard can be customized. The message itself can be edited, a logo can be added via URL, and a video can be added from YouTube or Vimeo.

Can I have New Hires fill out custom PDF forms?

Yes, upload your fillable PDF into the Document Library and the platform will automatically parse out your PDF fields, displaying them to the New Hire during the Onboarding process. Please review this page for more information on fillable PDFs.

FAQ (Frequently Asked Questions)

We have compiled a list of Frequently Asked Questions related to Onboarding on our Support Center. Please click here to review them.

Thank you!

Please contact
support@newtonsoftware.com
if you have any questions!