
newton

Onboarding Guide



ONBOARDING
by Paycor

WELCOME,
Tom Fisher

Welcome ✓

Personal

Contact

I-9 Verification

Direct Deposit

Tax Setup

Documents

Review

Submit

We're Glad You're Here!

Our company's onboarding wizard is here to help you complete your new hire paperwork. Please follow the steps and complete each page carefully before submitting. At the end of the wizard, you will have the ability to review, save and print your documents. Your supervisor or HR representative may reach out to you with any additional instructions. We look forward to having you join our team!

[Start Onboarding Now](#)

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”**.

PERFORM Welcome, Kevin My Settings Sign Out

Home Company **Employees** Me Learning

1 Manage Employees 

You have 1 pending new hires **2** Manage pending new hires

Search for an Employee New Hire Export Employee Data Reset Filters

Employee Name ▲	Employee Number ▲	Social Security Num... ▼	Status (3) ▼	Department ▼	Client ID ▼	Payroll ▼	Paygroup ▼
Brown, Steve	2	***-**-5555	Active	100 - Sales	120026	General	Bi-weekly
Craft, Jon	5	***-**-5555	Active	100 - Sales	120026	General	Bi-weekly
Peng, Kevin	3	***-**-5555	Active	100 - Sales	120026	General	Bi-weekly

*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.

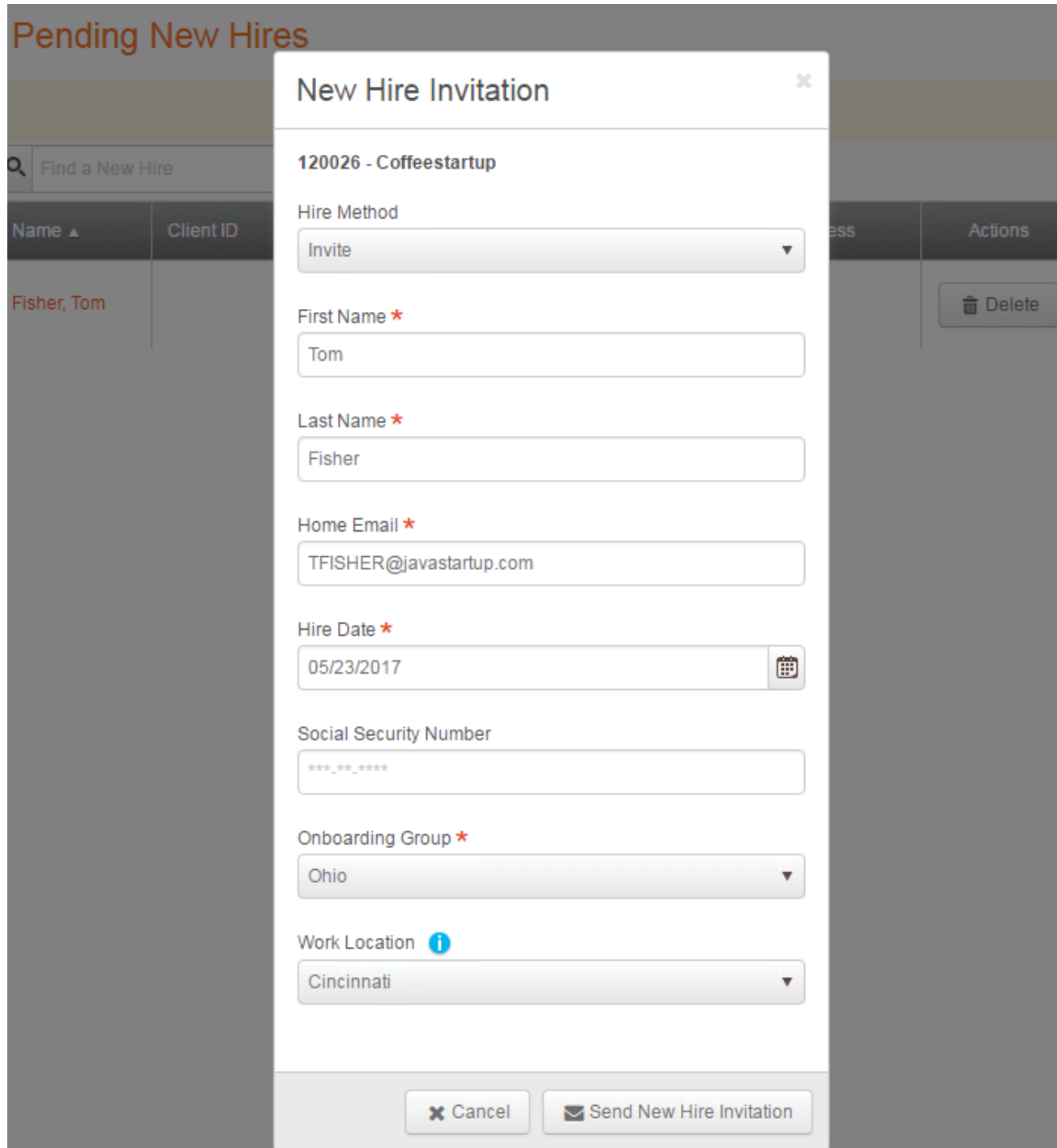
Pending New Hires

[Return to employee list](#)

Name ▲	Client ID	Email Addr...	Hire Date	Status	Progress	Actions
Fisher, Tom		TFISHER@ja...	05/23/2017	Awaiting Invitation		 Delete

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 screenshot shows a modal window titled "New Hire Invitation" overlaid on a "Pending New Hires" table. The table has columns for "Name" and "Client ID", with one entry for "Fisher, Tom". The modal form contains the following fields:

- 120026 - Coffeestartup** (Client ID)
- Hire Method**: A dropdown menu with "Invite" selected.
- First Name ***: A text input field containing "Tom".
- Last Name ***: A text input field containing "Fisher".
- Home Email ***: A text input field containing "TFISHER@javastartup.com".
- Hire Date ***: A date picker field showing "05/23/2017".
- Social Security Number**: A text input field with a placeholder "***_**_****".
- Onboarding Group ***: A dropdown menu with "Ohio" selected.
- Work Location**: A dropdown menu with "Cincinnati" selected and an information icon (i).

At the bottom of the modal, there are two buttons: "Cancel" and "Send New Hire Invitation".

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.

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.




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

Access Code

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.

ONBOARDING
by Paycor

WELCOME,
Tom Fisher

Welcome



Personal

Contact

I-9 Verification

Direct Deposit

Tax Setup

Documents

Review

Submit

We're Glad You're Here!

Our company's onboarding wizard is here to help you complete your new hire paperwork. Please follow the steps and complete each page carefully before submitting. At the end of the wizard, you will have the ability to review, save and print your documents. Your supervisor or HR representative may reach out to you with any additional instructions. We look forward to having you join our team!


[Start Onboarding Now](#)



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.

ONBOARDING
by Paycor

WELCOME,
Tom Fisher

 SIGN OFF

Welcome 	<h2>How Do We Reach You?</h2> <p>Home Phone</p> <input type="text" value="(510) 555 - 8819"/> <p>Mobile Phone</p> <input type="text" value="(510) 444 - 5259"/> <p>Work Phone <input type="text" value="(___) ___ - ___"/> Extension <input type="text"/></p> <p>Work Fax <input type="text" value="(___) ___ - ___"/></p> <p>Pager Number <input type="text" value="(___) ___ - ___"/></p>
Personal 	
Contact	
I-9 Verification	
Direct Deposit	
Tax Setup	
Documents	
Review	

[Back to Personal](#)[Save & Continue](#)

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.

Welcome	<h2>I-9 Verification</h2> <p>I am aware that federal law provides for imprisonment and/or fines for false statements or use of false documents in connection with the completion of this form. I attest, under penalty of perjury, that I am (select one of the following):</p> <p>Read I-9 Instructions</p> <p>Work Eligibility*</p> <div style="border: 1px solid #ccc; padding: 5px; display: flex; justify-content: space-between; align-items: center;"> A citizen of the United States </div> <p>Hide the Following:</p> <p>The following fields are optional on the I-9 form. Please select the fields you wish to exclude.</p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Social Security Number <input checked="" type="checkbox"/> Email Address <input type="checkbox"/> Phone Number <p>Preparer and/or Translator Certification (select one):*</p> <ul style="list-style-type: none"> <input checked="" type="radio"/> I am completing this form without a preparer or translator. <input type="radio"/> A preparer(s) and/or translator(s) is assisting me in completing this I-9 form. <i>If you select this option, you will need to complete I-9 form manually.</i>
Personal	
Contact	
I-9 Verification	
Direct Deposit	
Tax Setup	
Documents	
Review	
Submit	

[Back to Contact](#)

[Skip I-9 Verification](#)

[Save & Continue](#)

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.

I-9 Verification
Download as PDF
✕



Employment Eligibility Verification
 Department of Homeland Security
 U.S. Citizenship and Immigration Services

USCIS
Form I-9
OMB No. 1615-0047
 Expires 08/31/2019

▶ START HERE: Read instructions carefully before completing this form. The instructions must be available, either in paper or electronically, during completion of this form. Employers are liable for errors in the completion of this form.

ANTI-DISCRIMINATION NOTICE: It is illegal to discriminate against work-authorized individuals. Employers **CANNOT** specify which document(s) an employee may present to establish employment authorization and identity. The refusal to hire or continue to employ an individual because the documentation presented has a future expiration date may also constitute illegal discrimination.

Section 1. Employee Information and Attestation *(Employees must complete and sign Section 1 of Form I-9 no later than the first day of employment, but not before accepting a job offer.)*

Last Name (Family Name) Fisher	First Name (Given Name) Tom	Middle Initial N/A	Other Last Names Used (if any) N/A
Address (Street Number and Name) 55 Grove Street		Apt. Number N/A	City or Town Los Alamos
State CA		ZIP Code 93440	
Date of Birth (mm/dd/yyyy) 12/06/1989	U.S. Social Security Number <div style="border: 1px solid black; width: 100px; height: 20px; background-color: #ccc;"></div>	Employee's E-mail Address n/a	Employee's Telephone Number (510) 555-8819

I am aware that federal law provides for imprisonment and/or fines for false statements or use of false documents in connection with the completion of this form.

I attest, under penalty of perjury, that I am (check one of the following boxes):

1. A citizen of the United States

2. A noncitizen national of the United States (See instructions)

3. A lawful permanent resident (Alien Registration Number/USCIS Number: _____)

4. An alien authorized to work until (expiration date, if applicable: mm/dd/yyyy).
Some aliens may write "N/A" in the expiration date field. (See instructions)

Aliens authorized to work must provide only one of the following document numbers to complete Form I-9:
 An Alien Registration Number/USCIS Number OR Form I-94 Admission Number OR Foreign Passport Number.

1. Alien Registration Number/USCIS Number: _____

OR

▼

By signing this form, you attest under penalty of perjury (28 U.S.C. §1746) that the information you provided; the citizenship or immigration status you selected; and all information and documentation you provide to your employer, is complete, true and correct, and you are aware that you may face severe penalties provided by law and may be subject to criminal prosecution for knowingly or willfully making false statements or using false documentation when completing this form.

Last 4 digits of SSN*

3622






Electronic Signature*

Tom Fisher

Sign & Continue

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.

	WELCOME, Tom Fisher SIGN OFF
Welcome 	<h2>I-9 Verification Skipped</h2>
Personal 	<div data-bbox="506 909 1511 1062"><p> You've elected to download and complete your I-9 form manually. Bring x the completed form with you on your first day. Download the I-9 form now.</p></div>
Contact 	
I-9 Verification	<p>Didn't mean to skip? If you want to fill out your I-9 now, you can start over. Restart I-9 Verification.</p>
Direct Deposit	
Tax Setup	
Documents	
Review	
Submit	
Back to Contact	Save & Continue

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.



WELCOME,
Tom Fisher

[SIGN OFF](#)

Welcome

Personal

Contact

I-9 Verification

Direct Deposit

Tax Setup

Documents

Review

Submit

Let's Pay You Faster

Set up a direct deposit using your bank account information.

The full amount of your paychecks will be deposited into the entered account but you can set up more accounts once you've been hired.

DATE _____ 123

PAY TO THE ORDER OF _____ \$

_____ DOLLARS

Routing Number Account Number

Routing Number*

Bank Name

U.S. BANK NATIONAL ASSOCIATION

Account Number*

[Back to I-9 Verification](#)

[Skip Direct Deposit](#)

[Save & Continue](#)

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 image shows a screenshot of a user onboarding interface. A dark grey sidebar on the left contains menu items: Welcome, Personal, Contact, I-9 Verification, Direct Deposit, Tax Setup, Documents, Review, and Submit. The 'Tax Setup' item is highlighted. A white modal dialog box titled 'Tax Setup Tool' is open in the center, featuring a close button (X) in the top right corner. The dialog contains the following text and options:

Please select which sections you would like to complete:

- Federal**
 - Help me determine which withholding forms apply to me
- California Resident**
 - Help me determine which withholding forms apply to me
 - I want to skip this section
- Ohio Nonresident**
 - Help me determine which withholding forms apply to me
 - I want to skip this section

At the bottom right of the dialog are two buttons: 'Back' and 'Continue'.

Below the dialog, at the bottom of the sidebar, are two buttons: 'Back to Direct Deposit' and 'Launch Tax Setup'.

The New Hire Experience

New Hires can review the completed tax forms before submission.

Tax Setup Tool
✕

Federal *Employee's Withholding Allowance Certificate W-4*

Document Review

Please review the document and agree to the terms below.

Form W-4 (2017)

Purpose. Complete Form W-4 so that your employer can withhold the correct federal income tax from your pay. Consider completing a new Form W-4 each year and when your personal or financial situation changes.

Exemption from withholding. If you are exempt, complete only lines 1, 2, 3, 4, and 7 and sign the form to release it. Your exemption for 2017 expires February 15, 2018. See Pub. 505, Tax Withholding and Estimated Tax.

Note: If another person can claim you as a dependent on his or her tax return, you can't claim exemptions from withholding if your total income exceeds \$1,050 and includes more than \$350 of unearned income (for example, interest and dividends).

Exceptions. An employee may be able to claim exemption from withholding even if the employee is a dependent, if the employee:

- is age 65 or older,
- is blind, or
- will claim adjustments to income, tax credits, or itemized deductions, on his or her tax return.

The exceptions don't apply to supplemental wages greater than \$1,000,000.

Basic instructions. If you aren't exempt, complete the **Personal Allowances Worksheet** below. The worksheets on page 2 further adjust your withholding allowances based on itemized deductions, certain credits, adjustments to income, or two-earners/multiple jobs situations.

Complete all worksheets that apply. However, you may claim fewer (or zero) allowances. For regular wages, withholding must be based on allowances you claimed and may not be a flat amount or percentage of wages.

Head of household. Generally, you can claim head of household filing status on your tax return only if you are unmarried and pay more than 50% of the costs of keeping up a home for yourself and your dependent(s) or other qualifying individuals. See Pub. 501, Exemptions, Standard Deduction, and Filing Information, for information.

Tax credits. You can take projected tax credits into account in figuring your allowable number of withholding allowances. Credits for child or dependent care expenses and the child tax credit may be claimed using the **Personal Allowances Worksheet** below. See Pub. 505 for information on converting your other credits into withholding allowances.

Nonwage income. If you have a large amount of nonwage income, such as interest or dividends, consider making estimated tax payments using Form 1040-ES, Estimated Tax for Individuals. Otherwise, you may owe additional tax. If you have pension or annuity income, see Pub. 505 to find out if you should adjust your withholding on Form W-4 or W-4P.

Two earners or multiple jobs. If you have a working spouse or more than one job, figure the total number of allowances you are entitled to claim on all jobs using worksheets from only one Form W-4. Your withholding usually will be most accurate when all allowances are claimed on the Form W-4 for the highest paying job and zero allowances are claimed on the others. See Pub. 505 for details.

Nonresident alien. If you are a nonresident alien, see Notice 1380, Supplemental Form W-4 Instructions for Taxresident Aliens, before completing this form.

Check your withholding. After your Form W-4 takes effect, use Pub. 505 to see how the amount you are having withheld compares to your projected total tax for 2017. See Pub. 505, especially if your earnings exceed \$130,000 (Single) or \$180,000 (Married).

Future developments. Information about any future developments affecting Form W-4 such as legislation enacted after we release it will be posted at [www.irs.gov/efile](#).

Personal Allowances Worksheet (Keep for your records.)

A Enter "1" for **yourself** if no one else can claim you as a dependent A _____

B Enter "1" if:
{

- You're single and have only one job; or
- You're married, have only one job, and your spouse doesn't work; or
- Your wages from a second job or your spouse's wages (for the total of both) are \$1,500 or less. B _____

C Enter "1" for your **spouse**. But, you may choose to enter "-0-" if you are married and have either a working spouse or more than one job. (Entering "-0-" may help you avoid having too little tax withheld.) C _____

D Enter number of **dependents** (other than your spouse or yourself) you will claim on your tax return D _____

E Enter "1" if you will file as **head of household** on your tax return (see conditions under **Head of household** above) E _____

F Enter "1" if you have at least \$2,000 of **child or dependent care expenses** for which you plan to claim a credit F _____

(Note: Do not include child support payments. See Pub. 503, Child and Dependent Care Expenses, for details.)

G **Child Tax Credit** (including additional child tax credit). See Pub. 972, Child Tax Credit, for more information.

- If your total income will be less than \$70,000 (\$100,000 if married), enter "2" for each eligible child; then less "1" if you have two to four eligible children or less "2" if you have five or more eligible children.
- If your total income will be between \$70,000 and \$84,000 (\$100,000 and \$119,000 if married), enter "1" for each eligible child. G _____

H Add lines A through G and enter total here. **(Note: This may be different from the number of exemptions you claim on your tax return.)** ► H _____

For accuracy, **complete all worksheets**
{

- If you plan to **itemize or claim adjustments to income** and want to reduce your withholding, see the **Deductions and Adjustments Worksheet** on page 2.
- If you are **single and have more than one job** or are **married and you and your spouse both work** and the combined earnings from all jobs exceed \$50,000 (\$20,000 if married), see the **Two-Earners/Multiple Jobs Worksheet** on page 2.


Under penalties of perjury, I declare that I have examined this certificate and to the best of my knowledge and belief, it is true, correct, and complete.

Submit Form


Back to Direct Deposit
Launch Tax Setup

The New Hire Experience

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



WELCOME,
Tom Fisher


 SIGN OFF

- Welcome ✓
- Personal ✓
- Contact ✓
- I-9 Verification ✓
- Direct Deposit ✓
- Tax Setup ✓
- Documents**
- Review
- Submit

Documents

Let's walk through some company documents. You will need to review and sign each document. You can download these after submitting your onboarding.

Before you get started, please setup your electronic signature.

 [Setup Electronic Signature](#)

Documents To Read/Acknowledge

2/3 Complete

CA102
✓ Completed

Harassment Policy

W4101
✓ Completed

[Back to Tax Setup](#)

Setup Electronic Signature

The New Hire Experience

All digital documents are also downloadable as a PDF.

ONBOARDING Harassment Policy
Download as PDF
SIGN OFF

HARASSMENT POLICY

_____ is committed to providing a work environment free of unlawful harassment. It is illegal and against the policies of the Company for any employee to be subjected to harassment, including, but not limited to, harassment based on race, religious affiliation, color, age, sex, physical/mental disabilities, national origin, ancestry, medical condition, marital status, sexual orientation or any other basis protected by federal, state or local law.

It is illegal and against the policies of the Company for any person involved in the operation of the Company to harass another employee. Prohibited unlawful harassment on the basis of sex, age, race, ancestry or national origin, color, religious affiliation, physical/mental disability, medical condition, marital status, sexual orientation or any other protected basis includes, but is not limited to, the following behavior:

1. Verbal conduct such as epithets, derogatory jokes or comments, slurs or unwanted sexual advances, invitations or comments;
2. Visual conduct such as derogatory and/or sexually-oriented posters, photography, cartoons, drawings or gestures;
3. Physical conduct such as assault, unwanted touching, blocking normal movements or interfering with work; and
4. Retaliation for having reported or threatening to report harassment.

It is illegal and against the policies of the Company for any employee, male or female, supervisor or coworker to sexually harass another employee by (a) making unwelcome advances or requests for sexual favors or other verbal or physical conduct of a sexual nature a condition of an employee's continued employment, or (b) making submission to or rejections of such conduct the basis for employment decisions affecting the employee, or (c) creating an intimidating, hostile or offensive working environment by such conduct.

Any employee who believes that he or she is being harassed, for any reason, including sexual

I confirm that I have carefully reviewed this document and believe it to be true, accurate, and complete. Furthermore, I understand that by signing this form, I am agreeing that it represents my legally binding signature.

Electronic Signature*

Tom Fisher

Sign & Continue

The New Hire Experience

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

ONBOARDING
by Paycor

WELCOME,
Tom Fisher

← SIGN OFF

Welcome	✓	<h2>Review Onboarding</h2> <p>Please confirm all of your information is correct. You will have the opportunity to download your onboarding paperwork after submitting.</p>	
Personal	✓		
Contact	✓		
I-9 Verification	✓		
Direct Deposit	✓		
Tax Setup	✓		
Documents	✓		
Review			
Submit			

Personal [Edit](#)

Full Name	Tom Fisher
Birthdate	12/06/1989
Marital Status	Married
SSN	***-**-2252



Contact [Edit](#)

Address	55 Grove Street Los Alamos, CA 93440
Email	tomfisher@TomFisher.com
Mobile	(510) 444-5259
Home	(510) 555-8819

[Back to Documents](#)[Submit Onboarding](#)

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.

	WELCOME, Tom Fisher ← SIGN OFF
Welcome ✓	
Personal ✓	<h2 data-bbox="505 743 1380 869">Congrats and Welcome to Newton Onboarding!</h2> <p data-bbox="505 890 1481 921">Your onboarding is complete! Thank you for providing all of the requested information.</p>
Contact ✓	<p data-bbox="505 963 1284 1008">Your planned start date is: Monday, April 24th</p>
I-9 Verification ✓	<div data-bbox="505 1060 1510 1167" style="border: 1px solid #ccc; padding: 10px; text-align: center;"> Download your Employment Document Package</div>
Direct Deposit ✓	
Tax Setup ✓	<h3 data-bbox="505 1241 922 1278">Oh, And One More Thing</h3> <p data-bbox="505 1299 1481 1365">We need to complete your I-9 Verification before you get paid! Please bring documents that will establish identity and employment verification. These might include:</p>
Documents ✓	<ul data-bbox="545 1411 1227 1549" style="list-style-type: none">• Valid US Passport• Valid US Driver's License/State ID card and Birth Certificate• US Citizen ID Card and Valid Driver's License
Review ✓	
Submit ✓	<p data-bbox="505 1591 1461 1656">If you are under 18, are an alien authorized to work, or have questions about what to bring, visit the USCIS website for more Acceptable Documents.</p>

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.

Pending New Hires

[Return to employee list](#)

Name ▲	Client ID	Email Addr...	Hire Date	Status	Progress	Actions
Fisher, Tom	120026	KPENG@pay...	05/23/2017	Submit (Today)	43% <div><div style="width: 43%;"></div></div>	Delete

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.

PERFORM

Welcome, Kevin My Settings Sign Out

Home Company Employees Me Learning

Tom Fisher

Step 1 of 12

Personal

- Contact
- Position
- Status
- I-9 Verification
- Direct Deposit
- Tax Setup
- Additional Information
- Compensation
- Work Schedule
- Checklist
- Hire

Personal Information

Prefix Mr.	Birth Date * 12/06/1989	Marital Status Single
First Name * Tom	Age 27	Ethnicity/Race <i>i</i> White
Legal First Name <i>i</i> If different than First Name	Social Security Number * ***-**-4882 <input type="checkbox"/> Show	Disability <i>i</i> No
Middle Name	Gender * Male	Veteran <i>i</i> No
Last Name * Fisher		Accredited
Maiden Name e.g. Smith		
Suffix Select one		

Cancel

Next

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.

Tom Fisher

Step 3 of 12

- Personal
- Contact
- Position**
- Status
- I-9 Verification
- Direct Deposit
- Tax Setup
- Additional Information
- Compensation
- Work Schedule
- Checklist
- Hire

Position

Client
120026 - Coffeestartup

Job Title
Account Executive

Department *
100 - Sales

Paygroup *
Bi-weekly

FLSA *
Salary Non Exempt

Status Type *
Full Time

Work Location
Cincinnati

Employee Type *
Regular

Cancel Previous **Next**

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.

The screenshot displays the onboarding interface for Tom Fisher. On the left, a sidebar shows a progress bar at "Step 11 of 12" and a list of completed steps: Personal, Contact, Position, Status, I-9 Verification, Direct Deposit, Tax Setup, Additional Information, Compensation, and Work Schedule. The "Checklist" step is currently active and highlighted. Below the sidebar, the main content area is titled "Checklist" and includes the instruction: "This checklist and any other items you add below will appear on Tom's profile." A list of tasks with checkboxes is provided: Provision computer, Create network and email account, Assign desk, Order business cards, Order name plate, Give office tour, and Coordinate new hire team lunch. An "+ Add Item" button is located below the list. At the bottom right, there are three navigation buttons: "Cancel", "Previous", and "Next".

Tom Fisher

Step 11 of 12

- ✓ Personal
- ✓ Contact
- ✓ Position
- ✓ Status
- ✓ I-9 Verification
- ✓ Direct Deposit
- ✓ Tax Setup
- ✓ Additional Information
- ✓ Compensation
- ✓ Work Schedule
- *** Checklist

Checklist

This checklist and any other items you add below will appear on Tom's profile.

- Provision computer
- Create network and email account
- Assign desk
- Order business cards
- Order name plate
- Give office tour
- Coordinate new hire team lunch

+ Add Item

Cancel Previous Next

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.

Tom Fisher

Step 12 of 12

- ✔ Personal
- ✔ Contact
- ✔ Position
- ✔ Status
- ✔ I-9 Verification
- ✔ Direct Deposit
- ✔ Tax Setup
- ✔ Additional Information
- ✔ Compensation
- ✔ Work Schedule
- ✔ Checklist
- ... Hire

Hire

Personal	✔ Complete
Name, birth date, SSN, marital status	
Contact	✔ Complete
Address, phone, email	
Position	✔ Complete
Department, paygroup, job title	
Status	✔ Complete
Employee type, hire date	
I-9 Verification	✔ Complete
Documentation, eligibility	
Direct Deposit	✔ Complete
Account information	
Tax Setup	✔ Complete
Exemptions, filing status	
Additional Information	✔ Complete
Custom Fields	
Compensation	✔ Complete
Pay rates	
Work Schedule	✔ Complete
Hours, shift, clock number	
Checklist	✔ Complete
New Hire Checklist	
Employment Documents	<div style="border: 2px solid red; padding: 2px; display: inline-block;"> Download </div>

Cancel Previous Hire

Click 'Download' to Download all of this New Hire's uploaded documents.

Click 'Hire' to 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](#).

Home Company Employees Me Learning

Search for an Employee New Hire Export Employee Data Reset Filters

Employee Name	Employee Number	Social Security Nu...	Status (3)	Department	Client ID	Payroll	Paygroup
Brown, Steve	2	***.**-5555	Active	100 - Sales		General	Bi-weekly
Craft, Jon	5	***.**-5555	Active	100 - Sales		General	Bi-weekly
Fisher, Tom	6		Active	100 - Sales		General	Bi-weekly
Peng, Kevin			Active	100 - Sales	120026	General	Bi-weekly
Shiple, Caitlyn			Active	100 - Sales	120026	General	Bi-weekly
Smith, Steve	1		Active	100 - Sales	120026	General	Bi-weekly

Click an Employee’s name to review and edit his/her profile.

Click here to export out your employees’ information in bulk.

< Back To Manage Employees

Export Employee Data

To export employee information in bulk, check off the employees you wish to include, then click “Export Selected Employees”.

Export Selected Employees

	Employee Name	Start Date	Exported? (2)	Exported On	
<input type="checkbox"/>	Craft, Jon	05/18/2017	Yes	05/18/2017	Export
<input type="checkbox"/>	Fisher, Tom	05/23/2017	Yes	05/22/2017	Export
<input checked="" type="checkbox"/>	Brown, Steve	05/11/2017	No		Export
<input checked="" type="checkbox"/>	Peng, Kevin	05/12/2017	No		Export
<input checked="" type="checkbox"/>	Shiple, Caitlyn	05/17/2017	No		Export
<input checked="" type="checkbox"/>	Smith, Steve	05/11/2017	No		Export

To export out a single employee’s information, click the “Export” button.

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.

The screenshot displays the PERFORM Admin Configuration interface. The top navigation bar includes the PERFORM logo, a user greeting 'Welcome, Kevin', and links for 'My Settings' and 'Sign Out'. The main navigation menu has 'Home', 'Company', 'Employees', 'Me', and 'Learning'. The 'Configure' dropdown menu is open, showing 'Configure Company' as the selected item. Below this, a list of configuration options is visible: 'Work Locations', 'Organizations', 'Jobs', 'Document Library', 'Custom Fields', 'Onboarding Groups', 'Wizard Configuration', and 'Payroll'. The 'Work Locations' section is active, showing a table with one entry and an '+ Add Work Location' button.

Name	City	State	Phone Number
Cincinnati	Cincinnati	OH	

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.

Configure Company ▲

Work Locations

Organizations

Jobs

Document Library

Work Locations

+ Add Work Location

Add Work Location

Name *

Location Number

Phone Number

Time Zone

Division Code

Physical Address

Address Line 1 *

Suite

Address Line 2

Zip *

City *

State *

County

Country

Cancel Save

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.

Jobs + Add Job

Account Executive

Job Details

Active Employees	Last Updated On	Last Updated By
0		Peng, Kevin

Job Title * Job Code

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.

The screenshot displays the 'Document Library' configuration page. On the left is a sidebar menu with options: Configure Company, Work Locations, Organizations, Jobs, Document Library (selected), Custom Fields, Onboarding Groups, Wizard Configuration, and Payroll. The main content area shows a table with columns: Name, Category, Upload Date, and Actions. Three documents are listed: PTO Policy.pdf, Social Media Policy.pdf, and Uniform.pdf. A '+ Add Document' button is highlighted in the top right. An 'Add Document' modal dialog is open in the foreground, containing instructions on accepted file types, a file selection button, and input fields for Name and Category.

Name	Category	Upload Date	Actions
PTO Policy.pdf	-	05/11/2017	[Settings]
Social Media Policy.pdf	-	05/11/2017	[Settings]
Uniform.pdf	-	05/11/2017	[Settings]

Add Document

Accepted file types are PDF, JPG, PNG or TIF.

Upload Document *

Select file

Name *

Category

Cancel Add

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.

Edit Document ✕

Preview

Name *

Category

Uniform Order Form

Name:

Shirt Size:

Boot Size:

Uniform Color:

<p>Name *</p> <input type="text" value="Name"/> <p><input type="checkbox"/> Disable <input type="checkbox"/> Make Required</p>	<p>Field Type</p> <input type="text" value="Free Form (Alpha/N.."/>	
<p>Shirt Size *</p> <input type="text" value="Shirt Size"/> <p><input type="checkbox"/> Disable <input type="checkbox"/> Make Required</p>	<p>Field Type</p> <input type="text" value="Free Form (Alpha/N.."/>	
<p>Boot Size *</p> <input type="text" value="Boot Size"/> <p><input type="checkbox"/> Disable <input type="checkbox"/> Make Required</p>	<p>Field Type</p> <input type="text" value="Free Form (Alpha/N.."/>	
<p>Uniform Color *</p> <input type="text" value="Uniform Color"/> <p><input type="checkbox"/> Disable <input type="checkbox"/> Make Required</p>	<p>Field Type</p> <input type="text" value="Free Form (Alpha/N.."/>	

Disable fields, require fields, rename fields, or change field types after they've been parsed in from the original PDF, if needed.

Form fields from the PDF will automatically be detected and parsed into fields within the Onboarding wizard.

✕ Cancel
Save

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.

Configure Company ▲

Work Locations

Organizations

Jobs

Document Library

Custom Fields

Onboarding Groups

Wizard Configuration

Payroll ▼

Custom Fields

120026 - Coffeestartup + Add Custom Field

License Plate Number

Eligible to work from home?

License Plate Number

Voiced Check Copy

Field Name * License Plate Numt Field Type Free Form (Alpha/Nt) Delete

Make Required Include in New Hire Wizard

Cancel Save

Add Custom Field

Field Name *

Field Type Select One ▼

Make Required

Include in New Hire Wizard

Cancel Save

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.

The screenshot shows the 'Onboarding Groups' configuration page. On the left is a navigation menu with options: Configure Company, Work Locations, Organizations, Jobs, Document Library, Custom Fields, Onboarding Groups (selected), Wizard Configuration, and Payroll. The main content area is titled 'Onboarding Groups' and shows the company '120026 - Coffeestartup'. A '+ Add Group' button is highlighted in a red box. Below this, there's a dropdown menu for 'California' and a 'Group Name' field containing 'California'. A 'Delete' button is next to the group name. A table lists documents for this group:

Documents	Acknowledgement Type	Action
PTO Policy	Electronic Signature	[Settings] [Dropdown]
Social Media Policy	Electronic Signature	[Settings] [Dropdown]
Uniform	Electronic Signature	[Settings] [Dropdown]

At the bottom of the configuration area are '+ Add Document', 'Cancel', and 'Save' buttons.

The 'Add Group' modal dialog is shown. It has a title bar with a close button. The form includes:

- Group Name ***: Text input field containing 'Remote'.
- Category**: Dropdown menu set to '(Uncategorized)'.
- Selected Documents**: A list of documents with delete icons:
 - PTO Policy
 - Social Media Policy
- Checkboxes for document selection:
 - Select All
 - PTO Policy
 - Social Media Policy
 - Uniform

At the bottom are 'Cancel' and 'Save' buttons.

Admin Configuration

Wizard Configuration:

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

Configure Company ▲

- Work Locations
- Organizations
- Jobs
- Document Library
- Custom Fields
- Onboarding Groups
- Wizard Configuration
- Payroll ▼

Wizard Configuration

120026 - Coffeestartup ↻ Reset Wizard

Personal

- Personal
- Contact
- Position
- Status
- I-9 Verification
- Direct Deposit
- Tax Setup
- Compensation
- Work Schedule
- Checklist

Field Name	Include	Require
Prefix		
First Name		
Legal First Name		
Middle Name		
Last Name		
Maiden Name	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Suffix	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Alpha Sort	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Birth Date	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Social Security Number	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Gender	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Tobacco User	<input type="checkbox"/>	<input type="checkbox"/>
Marital Status	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Ethnicity/Race	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Disability	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Veteran	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Accredited	<input checked="" type="checkbox"/>	<input type="checkbox"/>

+ Add Helpful Link
✕ Cancel
✔ Save

Click on a specific Onboarding step to view the customization options for that step.

"Include" means the field is optional for the New Hire to fill out. "Require" means the field must be filled out by the New Hire.

If a field is neither included nor required, it will be hidden from the New Hire altogether.

However, Onboarding Admins can always view (and edit) all fields by navigating into the employee profile.

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.

The screenshot shows the 'Wizard Configuration' interface for a company named '120026 - Coffeestartup'. The left sidebar lists various configuration categories, with 'Wizard Configuration' selected. The main content area is titled 'Direct Deposit' and contains two checkboxes: 'Exclude this step' and 'Make step required', both of which are currently unchecked. Below these checkboxes is a table with three columns: 'Field Name', 'Include', and 'Require'. The table lists three fields: 'Routing Number', 'Account Number', and 'Account Type', each with checked boxes in the 'Include' and 'Require' columns. At the bottom right, there are 'Cancel' and 'Save' buttons.

Wizard Configuration

120026 - Coffeestartup Reset Wizard

Direct Deposit

Exclude this step

Make step required

Field Name	Include	Require
Routing Number	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Account Number	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Account Type	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

+ Add Helpful Link

Cancel Save

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.

Configure Company ▲

Work Locations

Organizations

Jobs

Document Library

Custom Fields

Onboarding Groups

Wizard Configuration

Payroll ▼

Wizard Configuration

120026 - Coffeestartup ↻ Reset Wizard

▼
Direct Deposit

Welcome

Personal

Contact

Position

Status

I-9 Verification

Direct Deposit

Tax Setup

Compensation

Work Schedule

Checklist

Exclude this step
 Make step required

Field Name	Include	Require
Routing Number	☑	☑
Account Number	☑	☑
Account Type	☑	☑

+ Add Helpful Link

✕ Cancel
✔ Save



Add Helpful Link ✕

Title *

Address *

✕ Cancel
+ Add

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.

Wizard Configuration

120026 - Coffeestartup Reset Wizard

Checklist

Exclude this step

Create and save a default checklist for new employees that will appear on the employee's profile. More items can be added later to an individual employee's checklist in the onboarding wizard.

Checklist	Actions
Provision computer	🗑️ ▲ ▼
Create network and email acc	🗑️ ▲ ▼
Assign desk	🗑️ ▲ ▼
Order business cards	🗑️ ▲ ▼
Order name plate	🗑️ ▲ ▼
Give office tour	🗑️ ▲ ▼
Coordinate new hire team lunc	🗑️ ▲ ▼

+ Add Item

Callout 1: Delete an item, or move an item up or down the checklist, through clicking the respective action button.

Callout 2: Click "Add Item" to create a new checklist item.

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.

Add Tax

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!