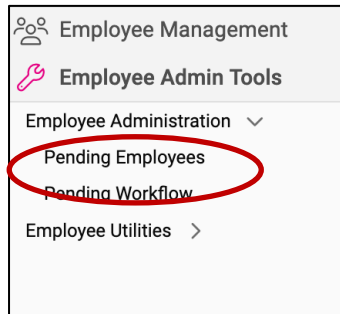


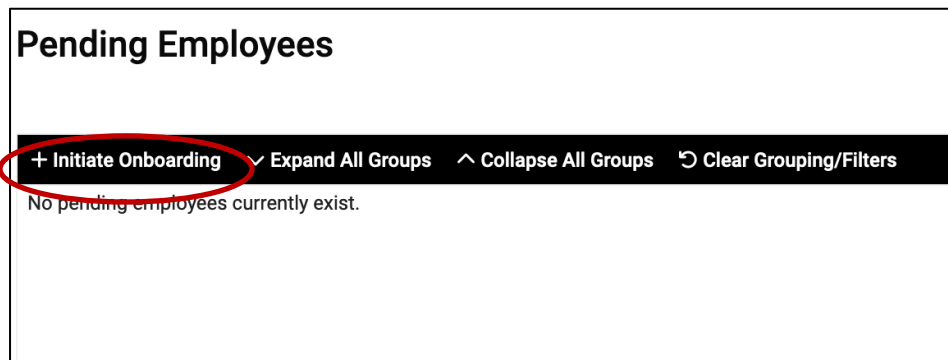
# Employee Onboarding (for business owner/payroll admin)

The isolated onboarding feature frees you up from the tedious task of collecting a new hire's information and documentation. You need only get the process started and then approve what the new employee submits.

1. On the **Employee Admin Tools** menu, select **Employee Administration** and then **Pending Employees**.



2. Click **Initiate Onboarding**.



3. Fill out the required information (employee name, email). Select your company name from the **Legal Company** dropdown and the location where the employee will work from the **Work Location** dropdown. Select the **Onboarding Template** from the dropdown. You can fill out the Job and Salary Information now or wait until the new hire has completed their information. You will be required to review and approve what they enter before they are considered to be hired. Click **Save**.

**Pending Employees** isolved University

[Save](#) [Back to List](#)

**Company Information**  
 Legal company Search or select from list  
 \* Work location Search or select from list

**Onboarding Template**  
 Onboarding template Search or select from list

**Additional Details**  
 Notice title(s) Search or select from list  
 Message title(s) Search or select from list

**New Hire Information**  
 \* First name  
 Middle name  
 \* Last name  
 \* Email address  
 Birth date MM / DD / YYYY  
 ID type Search or select from list  
 SSN - -  
 Hire date

**Salary Information**  
 Pay group Search or Select from list  
 Pay type Search or select from list  
 Frequency Search or select from list  
 Normal hours  
 Annual salary  
 Hourly rate  
 Per pay salary

**Alternate Pay Rate**  
[Add New](#)

**Job Information**  
 Job Search or select from list  
 Manager Search or select from list  
 Supervisor Search or select from list

**Organization Information**  
 Division Search or select from list  
 Department Search or select from list

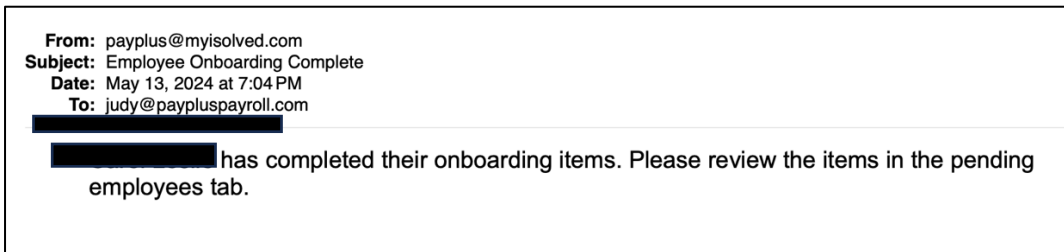
The new employee will be sent a link to the New Hire Wizard where they can fill out all their information, including Social Security Number, birthdate, emergency contacts, address, direct deposit, federal and state tax information.

They will also be able to upload documentation. The Form I-9 document is requested by default. If you have specific documents you want the employee to provide (driver's license, professional certificate, trade license, etc.) the wizard can be set up to request those. Ask your Payroll Specialist for assistance.

**Important:** The employee will enter their direct deposit information, but it is your responsibility to get proof of the routing and account numbers (voided check or bank letter) to avoid costly errors.

If you have several new hires to process, you can check their progress from the **Pending Employees** menu.

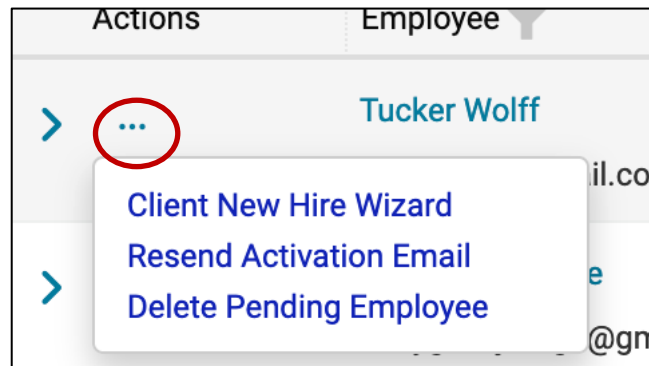
When the new hire has completed the onboarding forms, you will receive an email.



- To complete the hiring process, click on the employee's name in the **Pending Employees** screen.

Pending Employees						Isolated Univ
+ Initiate Onboarding    ▾ Expand All Groups    ▴ Collapse All Groups    ↻ Clear Grouping/Filters						
Drag a column header here to group by that column						
Actions	Employee ▾	Legal ▾	Onboarding Template ▾	Current Step ▾	Status ↑ ▾	
> ...	Tucker Wolff	[REDACTED]	New Hire Onboarding	Client Onboarding Wizard Assigned To: Multiple	Assigned to Me	
Client New Hire Wizard Resend Activation Email Delete Pending Employee						
> ...	[REDACTED]	[REDACTED]	New Hire Onboarding	Employee Onboarding Wizard Assigned To: [REDACTED]	Waiting on Employee	

Click the ... to see your options. To review what the employee entered, click **Client New Hire Wizard**. If the employee has lost the link to the onboarding wizard, you can resend the activation email. Or if you need to delete a pending employee (they've withdrawn their application or you've changed your mind about hiring them), you can do this from the same dropdown menu.



5. Select **Client New Hire Wizard** to start. Scroll through each page by clicking **Next**, reviewing what the employee entered and filling in any additional required information.
6. After you have reviewed each screen, you will see a screen notifying you when the employee has transitioned to new hire status (**Workflow Transition** screen) and then the **Data Audit** screen. If all information is complete, then you will see a screen stating that the employee has been hired.

**Pending Employees**

← Previous → Next ↻ Go Back to List

① Employee Information

- ✓ Employee Information
- ✓ Employment Information
- ✓ Salary
- ✓ I-9 Certification
- ✓ Direct Deposit
- ✓ Emergency Contacts
- ✓ Training and Development
- ✓ Documents

② Process Evaluation

Workflow Transition

Data Audit

**Tucker Wolff (tuck) (5/21/2024) - Workflow Transition**

The workflow will transition to the following step:

**Complete - Pending Employee Hired (Completes client wizard)**

Please select 'Next' to begin the review and identify any potential data issues.

**Pending Employees**

← Previous ↻ Go Back to List

① Employee Information

- ✓ Employee Information
- ✓ Employment Information
- ✓ Salary
- ✓ I-9 Certification
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- ✓ Emergency Contacts
- ✓ Training and Development
- ✓ Documents

② Process Evaluation

Workflow Transition

**Data Audit**

**Tucker Wolff (tuck) (5/21/2024) - Data Audit**

Swim Pro Aquatics

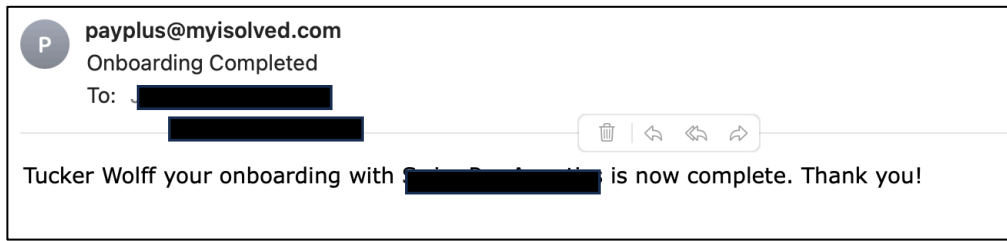
**AUDIT RESULTS:** The employee data review is complete and no data issues were found. Select 'Complete New Hire' to finalize the hiring process.

[Complete New Hire](#)

**Pending Employees**

Tucker Wolff has been hired.

The employee will then receive an email that the onboarding is completed.



If you would like to see what the Onboarding Wizard looks like from the new hire's perspective, ask your Payroll Specialist for the "Onboarding Wizard" document.