May 20, 2022

isolved™

Onboarding

(Employee – People Cloud)

isolved

Help Docs

Table of Contents

![isolved Help Docs logo]

Employee

Upon login or authentication by the new hire, they are presented with terms of use. They must accept these terms to move on to the Onboarding Wizard **Welcome** screen. The screen contains a pop-up asking them to accept the terms of electronic signature as accepted signatures for their tax forms and I9 documentation. *If the employee declines, they will not be able to complete the onboarding session electronically.* This full document will be saved under "Employee Documents" on the **Personnel** tab once the employee record is saved in isolved.
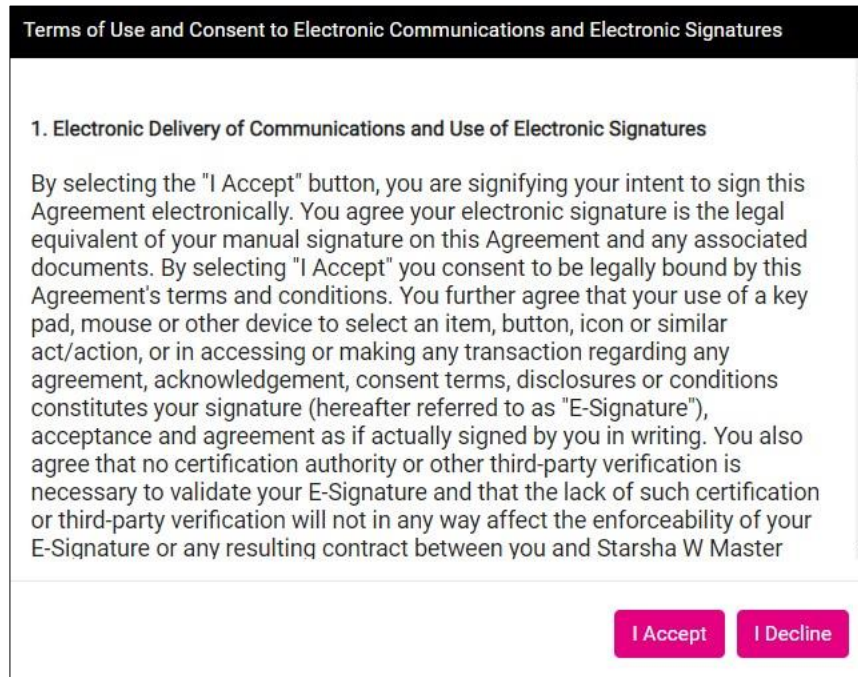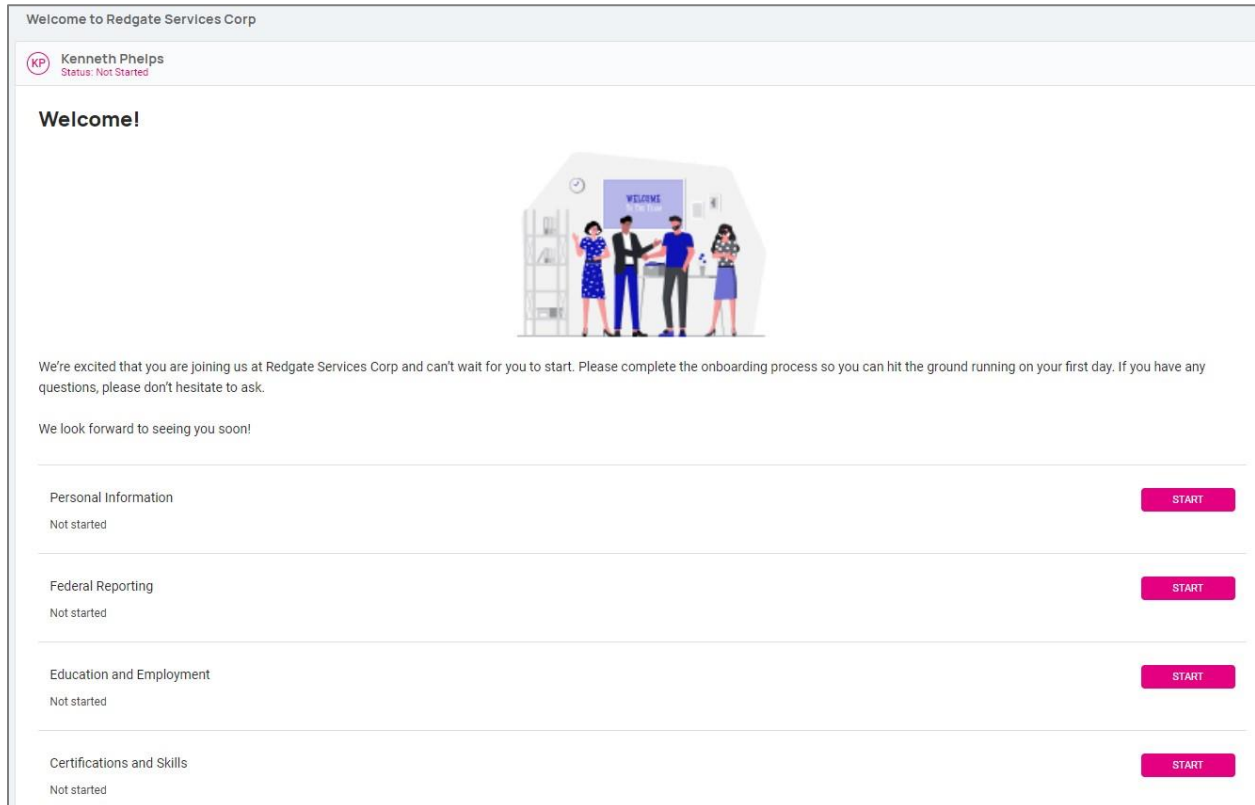

The "Welcome Message" assigned on the onboarding template initiated for this new hire determines which welcome message displays. This is what the user will see if using the Employee Self-Service version of Onboarding:
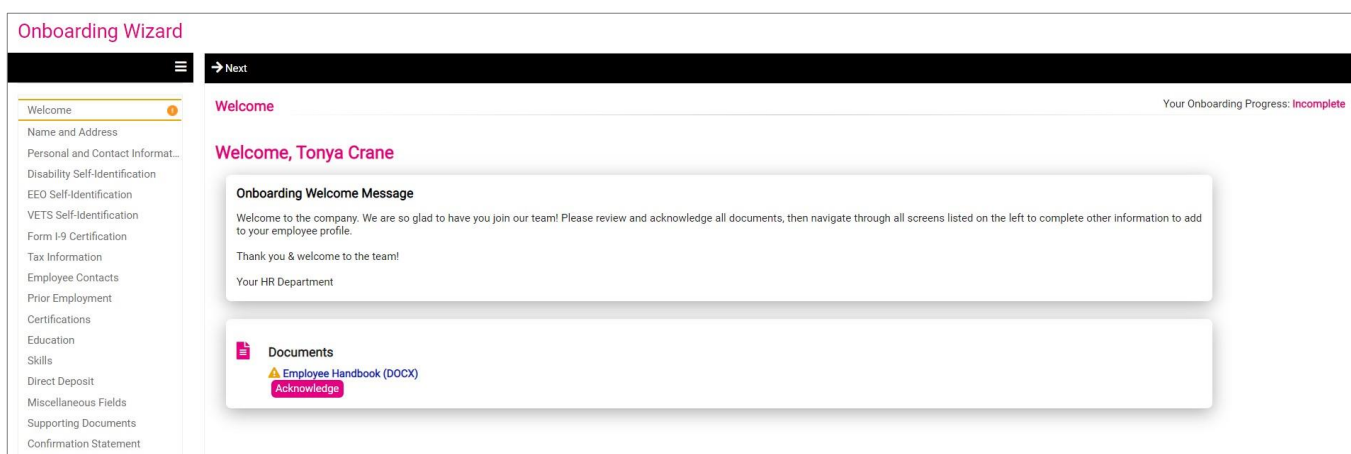
The new hire can move from screen to screen by selecting the **Next** button at the top of the screen. They also can jump to specific screens by selecting the menu item on the left. The information entered on the **Initiate New Hire** screen displays on the **Welcome** screen (Assigned Supervisor/Manager, Hire Date, Email Address, etc.).

This is what the employee sees if the client is using the Adaptive Employee Experience version of Onboarding, where the "Welcome" message will appear at the bottom of the page and the employee will have navigation by selecting **Next** or the menu at the left side of the page:

Welcome to Redgate Services Corp

(KP) **Kenneth Phelps**
Status: Not Started

Welcome!

We're excited that you are joining us at Redgate Services Corp and can't wait for you to start. Please complete the onboarding process so you can hit the ground running on your first day. If you have any questions, please don't hesitate to ask.

We look forward to seeing you soon!

Personal Information Not started	START
Federal Reporting Not started	START
Education and Employment Not started	START
Certifications and Skills Not started	START

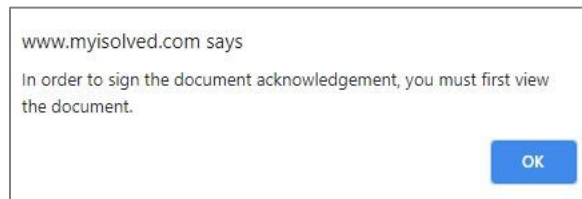![isolved logo] **Help Docs**

When the new hire selects the **Start** button for "Personal Information," the following screen is displayed. The employee can either use the **Next** button at the bottom of the screen to navigate between screens or select the options on the left-side menu.

ısolved
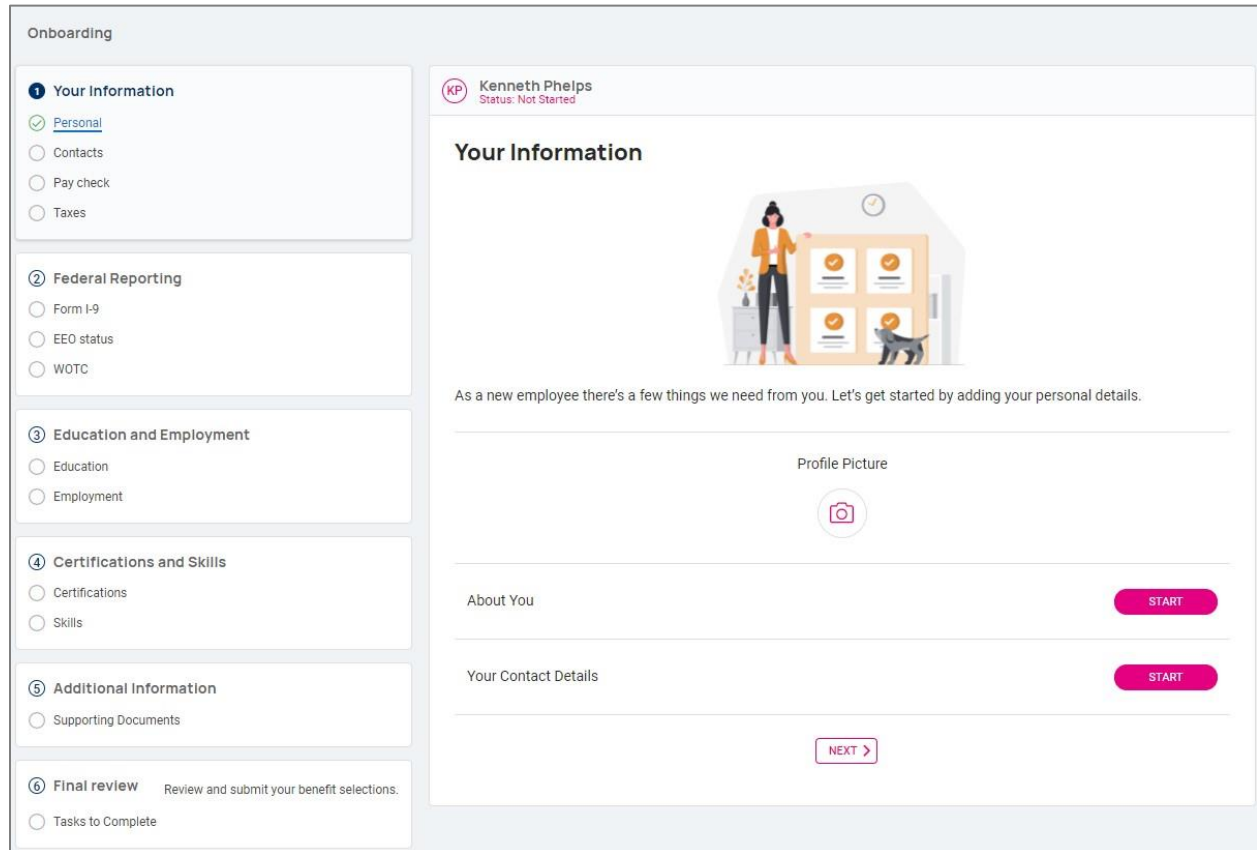
Help Docs

Documents Requiring Acknowledgement

When attached to the Welcome Message, a document can require acknowledgement and will be shown on the **Welcome** page of the Onboarding Wizard. The New Hire Onboarding Wizard prevents a new hire from completing the Onboarding Wizard if required documents have not been reviewed and acknowledged on the **Welcome** screen. The employee is alerted in the "Action Required" message box on the confirmation statement. The alert specifies that the new hire should return to the welcome screen. The employee will not be able to acknowledge the document(s) without opening them first.

Documents
⚠ Employee Handbook (DOCX)
Acknowledge

www.myisolved.com says
In order to sign the document acknowledgement, you must first view the document.

OK

Documents
✔ Employee Handbook (DOCX)

Note: The file size limit per document is 25MB.

These options look similar in the Adaptive Employee Experience. The employee scrolls to the bottom of the page to see the documents and links that are attached to the "Welcome Message."

Please acknowledge the following documents
Company Handbook

Link(s)
Owner Welcome Message

Help Docs

Employee Data

Any data you have entered on the **Initiate New Hire** screen appears here. The new hire is required to enter their full address before moving to the next screen.

In Adaptive Employee Experience, the employee sees similar options under the **About You** heading. There are a couple of differences on this page from what we see in Employee Self-Service.

1. The employee is able to enter preferred pronouns. This is currently only available during the Adaptive Employee Experience Onboarding session and is shown on the Employee Summary. Further development will occur for this feature.
2. The employee can enter an alternate address by selecting the option at the bottom of the page. This adds an expanded area where they can add another address. Choices are:

   a. Military address
   b. Address for paychecks
   c. Address for tax forms including Form W-2, 1099, and ACA forms.

isolved

Help Docs

About You

All fields are required unless marked optional

First name	Kenneth
Middle	optional
Last name	Phelps
Prefix	optional
Suffix	optional
Preferred name	optional
Pronouns	optional

Home Address

Your address must be completed for tax withholding forms to be available.

Address	1 Tree Top Ct
Address 2	optional
	Apartment, suite, building, etc.
Zip code	21030
	Tap 'Enter' with cursor in field to retrieve city list
City	Cockeysville
State	MD

You can add an alternate address if you would like your paychecks or tax forms mailed to a different address including a military or foreign address.

⊕ Add alternate address

CANCEL   **SAVE**

Alternate Address

☐ I have a military address
☐ Use for paychecks
☐ Use for tax forms W2, 1099, ACA form 1095

Country	Select ⌄
Address	
Address 2	optional
	Apartment, suite, building, etc.
City	
State	Select ⌄
Zip code	

⊖ Remove alternate address

CANCEL   **SAVE**

Help Docs

Personal and Contact Information

Personal and Contact Information collects the new hire's SSN and birthdate, as well as other personal information.

Personal and Contact Information

Personal Information

ID Type:	SSN
*SSN:	222-22-2222
Marital Status:	Married
Birth Date:	10/10/1989
Military Status:	

Contact Information

Home Phone:	
Mobile Phone:	864-555-5555
Office Phone:	
Fax Number:	
Personal Email:	

If using the Adaptive Employee Experience, users see this information under **Your Contact Details**.

Your Contact Details

All fields are required unless marked optional

Date of birth	optional
ID type	SSN
SSN	*** - ** - **** 👁 Edit
Work phone	optional Ext. 12345
Fax	optional
Home phone	optional
Mobile phone	optional
Email address	optional
	Enter your personal email
Marital status	Single
Military status	None

CANCEL   SAVE

![isolved logo]

Help Docs

Education

The options for the **Education** drop-down menu are created on the **Client > Human Resources > Education** screen. The employee may add as many educational experiences as apply. Remember some of the fields were marked with "Hide" in the template. Therefore, the employee is not seeing those fields.

The Adaptive Employee Experience view is similar but instead of having fields marked with an asterisk to indicate a required field, there is a message stating that all fields are required unless marked optional. Fields that are required (other than the level of education) are selected in the template.

isolved

Tax Information-Symmetry Forms

New Hire Onboarding utilizes the Symmetry software to guide the new employee to complete the proper Federal and State forms. The forms are also able to be electronically signed while completing the Onboarding Wizard. ESignature includes printing the employee's name, date, and time stamp (for Federal and some states) on the signature line of the tax withholding forms. In Employee Self-Service, the employee sees a screen to start the tax wizard.

In Adaptive Employee Experience, the employee visits the Tax Information screen and sees a button that they can select to add tax information. If they have not filled in their address or SSN yet, they will get a red warning that the wizard can't be started because information is missing and must be completed.
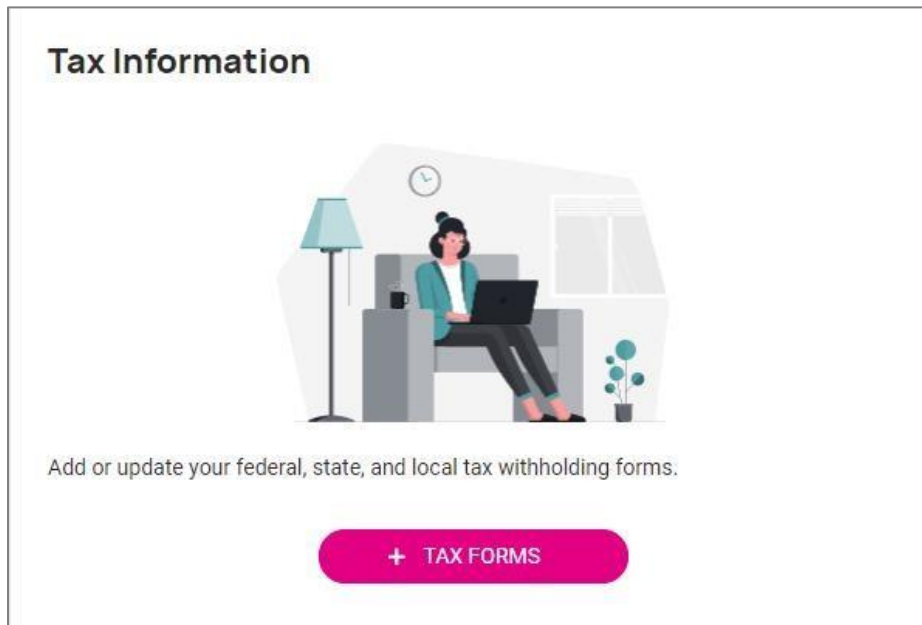
The wizard will have the appropriate tax forms based on the information added in "Initiate New Hire."

isolved
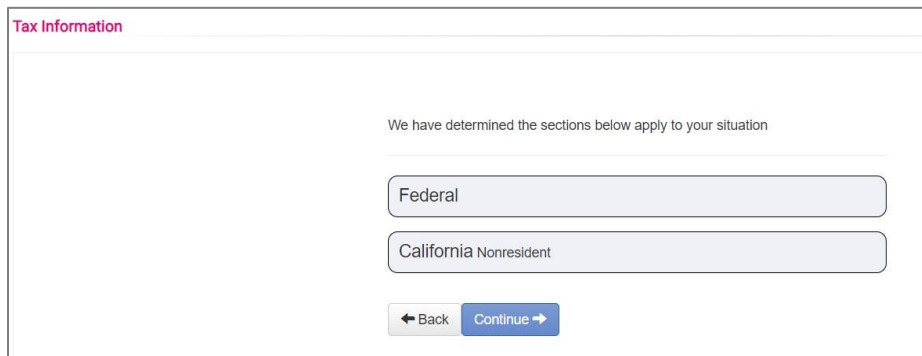
Help Docs

The employee's SSN is a required field during onboarding. The last 4 digits of the new hire's SSN are passed to Symmetry to use as the PIN for E-Signature. When a new hire attempts to "submit" their tax forms the following message displays:

"Please verify the accuracy of your tax forms and electronically sign the documents by entering a PIN. Your PIN is the last four digits of your SSN."

Symmetry Tax Forms passes employer information for all federal and state forms. The Employee E-Signature only displays upon viewing the Federal/State tax form in Employee Documents. It does not display to the new hire when viewing the PDF of the tax form while completing the New Hire Onboarding Wizard.

I-9 Document Creation and E-Signature

The new screen for the Employee I-9 is available both in the Onboarding Wizard and in Employee Self-Service.

There is a second screen after the employee record is saved for the authorized representative (i.e. Manager, Supervisor or Client) to upload verification documents, validate the employee I-9, and complete the employer portion of the I-9 document. Once complete a final version of the I-9 is available under **Employee Documents**.

Employee I-9 Screen

- Available in Onboarding and Employee Self Service.
- The screen shows required fields that must be filled in by the employee.
  Note: The SSN is only required if the company has the Legal Service "E-Verify" enabled.
- Users can edit data before clicking the **Sign Form** button. At this point, the data will only be used on the saved PDF of the I-9, but not saved to the database until the Manager/Supervisor has completed the verification process.
- The completed I-9 PDF is stored in **Employee Documents**.
- The (check one of the following) drop-down populates with citizenship choices.
- The **Signature of Employee** field appears at the bottom of the screen. The employee should type their name, first and last. It must match the information they had entered exactly.
- Complete the translator or preparer section of the I-9.

- Click on the **Validate** Form button. The employee receives the following message if data is missing within the form:

> You are missing the following data:
>
> Middle Initial
> Other Last Names Used
>
> Return to the form to review and complete the missing fields if applicable. Once you have reviewed the form and are ready to sign, select 'Sign Form.' Upon signing, any fields left blank will be auto-completed with 'N/A.'
>
> **Review Form**

- Click on the **Review Form** button.
- Select the **Sign Form** button.
- Click on the **Acknowledge** button to complete the signature.

> I acknowledge that I have read and understand the following attestation statement:
>
> **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, I am a citizen of the United States.**
>
> I have agreed to the Terms of Use and Consent to Electronic Signature. I certify the terms and conditions of the agreement are still in effect. I acknowledge I am electronically signing my Form I-9.
>
> **Acknowledge**   Cancel

- After the employee clicks on the **Acknowledge** button, the following message is displayed:

> **Form I-9 Certification**
>
> Your form I-9 has been submitted. Please see HR to make any changes.

Adaptive Employee Experience for this section looks very different but has the same outcome at the end. The employee is first given the option to review the instructions by sele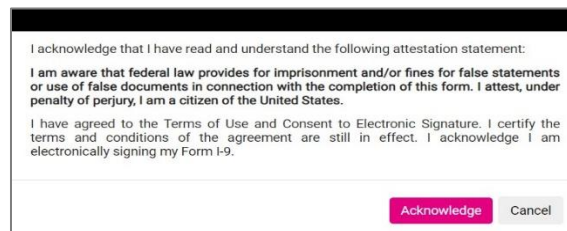cting the **View Instructions** button which directs them to the USCIS website. The employee next opens the I-9 wizard by selecting the **+ Form I-9**, they will be prompted to enter the same data as shown in the Employee Self-Service version in a long-form, part of which is shown below. When the form is filled in with all required fields, a button that says **Save** appears at the bottom of the page. Until the fields are filled, the button is greyed out to indicate it is unavailable.

isolved

Help Docs

When the employee selects **Validate**, they see a summary of the information they have entered and are able to select the citizenship status and enter their name to electronically sign the document. The **Sign** button is not available until both fields have been filled in.

![isolved]

Help Docs
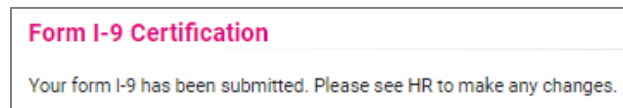
Attestation statement ✕

I acknowledge that I have read and understand the following attestation statement:

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, I am a citizen of the United States.

I have agreed to Terms of Use and Consent to Electronic Signature, and I certify the terms and conditions of the agreement are still in effect. I acknowledge I am electronically signing my Form I-9.

CANCEL   ACKNOWLEDGE

Federal Reporting Data

Disability Self-Identification

The **Disability Self-Identification** screen allows the new hire to select from options to confirm if they have any disability.

Disability Self-Identification

Your Onboarding Progress: **Incomple**

Form CC-305
OMB Control Number 1250-0005
Expires 05/31/2023

Why are you being asked to complete this form?

We are a federal contractor or subcontractor required by law to provide equal employment opportunity to qualified people with disabilities. We are also required to measure our progress toward having at least 7% of our workforce be individuals with disabilities. To do this, we must ask applicants and employees if they have a disability or have ever had a disability. Because a person may become disabled at any time, we ask all of our employees to update their information at least every five years.

Identifying yourself as an individual with a disability is voluntary, and we hope that you will choose to do so. Your answer will be maintained confidentially and not be seen by selecting officials or anyone else involved in making personnel decisions. Completing the form will not negatively impact you in any way, regardless of whether you have self-identified in the past. For more information about this form or the equal employment obligations of federal contractors under Section 503 of the Rehabilitation Act, visit the U.S. Department of Labor's Office of Federal Contract Compliance Programs (OFCCP) website at www.dol.gov/ofccp.

How do I know if I have a disability?   *Click here for answer*

Please select one of the options below:

◯ Yes, I Have A Disability, Or Have A History/Record Of Having A Disability

◯ No, I Don't Have A Disability, Or A History/Record Of Having A Disability

◉ I Don't Wish To Answer

PUBLIC BURDEN STATEMENT: According to the Paperwork Reductions Act of 1995 no persons are required to respond to a collection of information unless such collection displays a valid OMB control number. This survey should take about 5 minutes to complete.

.isolved™
Help Docs

EEO Self-Identification

The **EEO Self-Identification** screen allows the new hire to select pertinent details about themselves, including Gender and Ethnic Origin, that are required for federal reports.

EEO Self-Identification   Your Onboarding Progress: Incomplete

Why you are receiving this invitation and instructions: To comply with governmental recordkeeping and reporting requirements for the administration of civil rights laws and regulations, your employer invites employees to voluntarily identify their race, ethnicity, and gender on this EEO Self-Identification Form.

The data you provide on this form will be used for governmental reporting requirements. Your employer will keep the data confidential and will not use it to make decisions about the terms and conditions of employment.

Completion of this form is optional. If you choose not to identify your race, ethnicity, or gender at this time, the federal government requires your employer to determine this information by visual observation and/or other available information.

For civil rights monitoring and enforcement purposes only, all race, ethnicity, and gender information will be collected and reported in the categories identified below. The definitions for Race/Ethnic identification have been established by the Equal Employment Opportunity Commission (EEOC). If you choose to voluntarily self-identify, you may mark only one of the boxes in each section presented below.

Gender Identification (select only one):
○ Female
○ Male
○ Non-binary
● I do not wish to disclose

Race/Ethnic Identification (select only one):
Click here for definitions of Race/Ethnicity
○ Hispanic or Latino
○ White (Not Hispanic or Latino)
○ Black or African American (Not Hispanic or Latino)
○ Native Hawaiian or Pacific Islander (Not Hispanic or Latino)
○ Asian (Not Hispanic or Latino)
○ Native American or Alaska Native (Not Hispanic or Latino)
○ Two or More Races (Not Hispanic or Latino)
● I do not wish to disclose

Anti-Discrimination Notice It is an unlawful employment practice for an employer to fail or refuse to hire or to discharge any individual, or otherwise to discriminate against any individual with respect to that individual's terms and conditions of employment, because of such individual's race, color, religion, sex (including pregnancy), national origin, disability, age, genetics, or veteran status.

VETS Self-Identification

The VETS Self-Identification screen allows the new hire to select pertinent details such as their veteran status/discharge date that are required for federal reports.

VETS Self-Identification   Your Onboarding Progress: Incomplete

Your employer is a federal government contractor subject to the Vietnam Era Veterans' Readjustment Assistance Act of 1974, as amended by the Jobs for Veterans Act of 2002, 38 U.S.C. 4212 (VEVRAA), which requires employers to take affirmative action to employ and advance in employment veterans within one of the following four categories: 1) Disabled Veteran, 2) Recently Separated Veteran, 3) Active Duty Wartime or Campaign Badge Veteran, 4) Armed Forces Service Medal Veteran.

This information is being requested on a voluntary basis. It will be kept confidential except when your employer is required to provide information to the Office of Federal Contract Compliance (OFCCP), United States Department of Labor (US DOL). Refusal to provide this information will not subject you to any adverse treatment, and this information will not be used in a manner inconsistent with the Vietnam Era Veterans' Readjustment Assistance Act of 1974, as amended.

Protected veterans may have additional rights under the Uniformed Services Employment and Reemployment Rights Act (USERRA.) In particular, if you were absent from employment in order to perform service in the uniformed service, you may be entitled to be reemployed by your employer in the position you would have obtained with reasonable certainty if not for the absence due to service. For more information, call the U.S. Department of Labor's Veterans Employment and Training Service (VETS), toll-free, at 1-866-4-USA-DOL.

As a Government contractor subject to VEVRAA, your employer is required to submit a report to the OFCCP, US DOL, each year identifying the number of employees belonging to each specified "protected veteran" category. If you believe you belong to any of the categories of protected veterans, please indicate by selecting the appropriate box below. *Click here for a definition of each category*

If you are not a veteran, select the first option. If you are a veteran, select the option(s) that apply to your veteran status:

○ I am not a veteran.
○ I belong to the following categories of protected veterans (Choose all that apply):
  ☐ DISABLED VETERAN
  ☐ RECENTLY SEPARATED VETERAN   Military Discharge Date (MM/DD/YYYY): [_____] 📅
  ☐ ACTIVE WARTIME OR CAMPAIGN BADGE VETERAN
  ☐ ARMED FORCES SERVICE MEDAL VETERAN
○ I am a protected veteran, but I choose not to self-identify the categories to which I belong.
○ I am NOT a protected veteran. (I served in the military but do not fall into any veteran categories listed above.)
● I choose not to identify my veteran status.

Reasonable Accommodation Notice: If you are a disabled veteran, please tell us whether there are accommodations we could make that would enable you to perform the essential functions of the job, including special equipment, changes in the physical layout of the job, changes in the way the job is customarily performed, provision of personal assistance services or other accommodations.

Anti-Discrimination Notice: It is an unlawful employment practice for an employer to fail or refuse to hire or to discharge any individual, or otherwise to discriminate against any individual with respect to that individual's terms and conditions of employment, because of such individual's race, color, religion, sex (including pregnancy), national origin, disability, age, genetics, or veteran status.

Note: These screens present the same disclaimers and capture the same information in the Adaptive Employee Experience but are presented in a longer view.

Miscellaneous Fields

Since Miscellaneous Fields would be added to capture some customized information, it is required to complete this field. The field(s) appear, and the data type selected when setting up the Miscellaneous Employee Fields will be used in the template.

Prior Employment

The new hire may add as many applicable employments as needed.

![isolved logo]

Help Docs

In Adaptive Employee Experience, this same information is captured in a long form.

Direct Deposit

The employee can add direct deposit account(s) by clicking the **Add New** button on the left side of the screen. If a page message has been added, it will show on the right side of the screen.

![isolved logo]

Help Docs

The entry of direct deposit data is different (though similar) in the Adaptive Employee Experience. The employee sees a screen like this that walks them through the setup for their account. Multiple accounts can be added if necessary.

Bank Details

All fields are required unless marked optional

Your Name		1001
123 Main Street		
Anywhere, NC 12345	DATE	
PAY TO THE ORDER OF		$
		DOLLARS
ROUTING NUMBER	ACCOUNT NUMBER	CHECK NUMBER
⑆998887756	⑈00123456789	⑈1001

Routing number [   ]

Account number [   ]

Account type [Select   ⌄]

Description [optional   ]

Deposit details

Any remaining net pay may be issued by paper check

Distribution details

○ Flat dollar amount

○ Percentage of net pay

○ Remaining net

Frequency [Every Pay   ⌄]

[CANCEL] [**SAVE**]

Confirmation Statement

New hires have the ability to review all information entered on the **Confirmation Statement** screen.

Similar to benefits enrollment, submission is not possible if required info is missing or any document acknowledgment has not occurred.

Confirmation Statement   Your Onboarding Progress: Incomplete

Confirmation Statement for Tonya Crane

⚠ **ACTION REQUIRED**   New Hire Onboarding can not be submitted until the following sections are updated and saved:
- Direct Deposit
- Confirmation Statement

isolved

Help Docs

If the new hire would like to come back to the Onboarding Wizard later, they should select the **Save and Submit Later** button and log out of the session by clicking their name in the upper-left corner and selecting the option to **Logout**.

Confirmation Statement   Your Onboarding Progress: Incomplete

Confirmation Statement for Tonya Crane

> **! ACTION REQUIRED** You have agreed to the Terms of Use and Consent to Electronic Signature. A copy of your agreement is available in Employee Documents. By selecting Submit, you certify the terms and conditions of the agreement are still in effect and the information you are submitting is accurate.
>
> [Save and Submit Later]   [Submit]

Once the employee has submitted, the buttons disappear, and the following message appears:

Confirmation Statement   Your Onboarding Progress: Complete

Confirmation Statement for Tonya Crane   [Print]

> To make changes to your personal or tax information, contact HR. Thank you.

At this point, they cannot make any changes, and the **Submit** button is no longer available. A copy of the "Onboarding Confirmation Statement" is added to the list of documents on the **Employee Documents** screen and can be reviewed by the employee and authorized users once the employee is saved.

In Adaptive Employee Experience, the message displayed when the employee gets to the last page looks like this if they still have fields to fill in. If the employee has missed any of the required fields, they appear here with clickable links back to the screen where the information can be entered.

Almost Done!

It looks like some items need your attention.

Personal Information

Your Information   Missing information

Tax Information   Missing information

Federal Reporting

Form I-9   Missing information

Help Docs

Once the employee has completed all required fields, they see the **Onboarding Authorization** screen where they can review the information that they've entered by opening menu items below the message. They can either elect to submit the information at that time or submit it later.

Onboarding Authorization

Your onboarding information has been successfully saved and can be reviewed below.

You have agreed to the Terms and Conditions of Use and Consent to Electronic Signature, and a copy is available to you to in Preferences.

By selecting 'Submit' you agree the information you are submitting is accurate.

SUBMIT

SUBMIT LATER