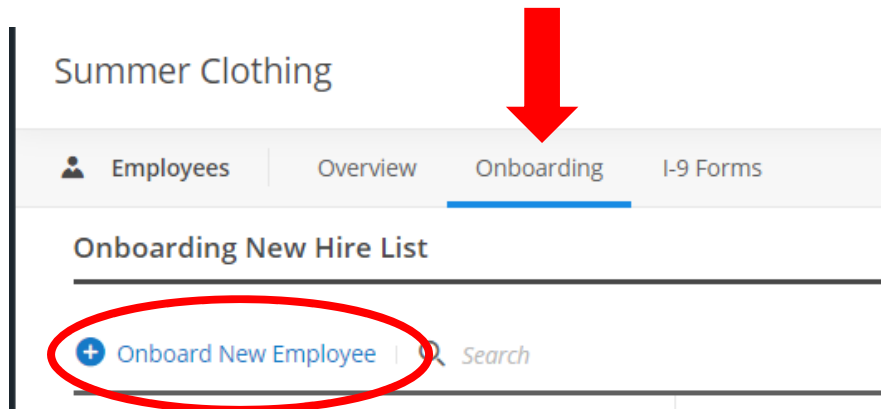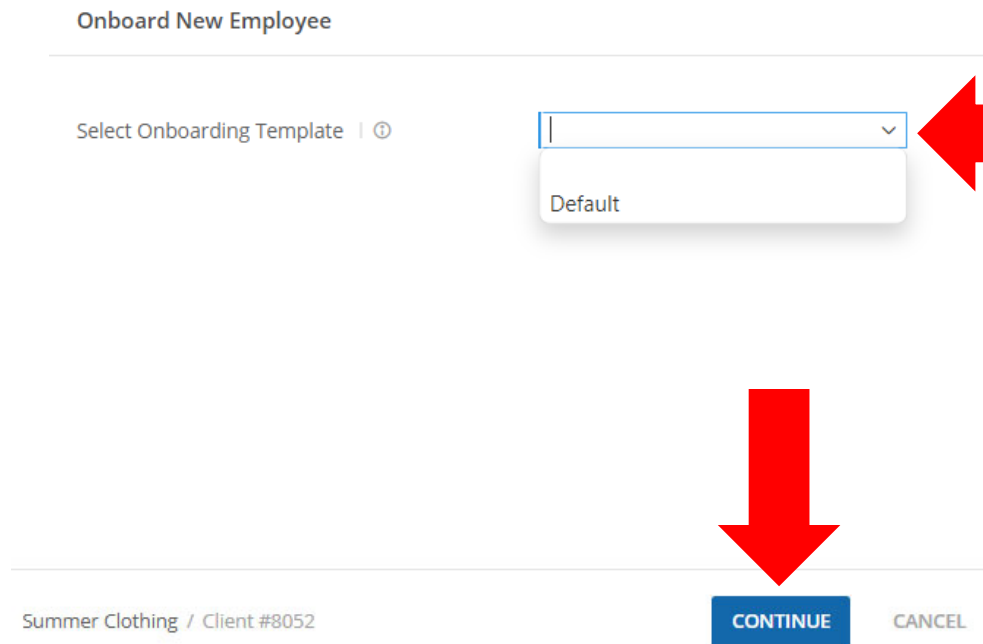# DecisionHR

Online Onboarding
Client Manual

Online Onboarding – Client Portion

Part 1 – Onboarding a New Hire

1. Log into you DHR Worklio account. Go to the Employees Tab, then select Onboarding. Click Onboard New Employee.

2. Click on the drop-down arrow to select your Onboarding Template. These have been pre-populated for your business. Click continue.

3. Enter the employee's First Name, Last Name, Social Security Number and Email Address. Then click Next. ***All fields in blue are REQUIRED.***

Hire And Onboard A New Employee / **Employee Basic Information** (1/5)

MANDATORY INFORMATION

First Name	
Last Name	
Employee Identification	SSN
SSN	___-__-____
Login Email Address ⓘ	

NEXT   CLOSE

4. Enter the Original Hire Date. Then click Next. ***All fields in blue are REQUIRED.***

Hire And Onboard A New Employee / **Employment Basic Information** (2/5)   Actions

GENERAL EMPLOYMENT INFORMATION

		IMPORTANT DATES		
Employee ID	36	Benefits Waiting Period Start	☑	Same as Original Hire Date
Clock Number				
Original Hire Date	MM/DD/YYYY 📅			
Distribution Code	Use Client Settings			

GENERAL EMPLOYMENT INFORMATION

Union Member	☐
Union	...

Summer Clothing / Client #8052   BACK   NEXT   CLOSE

5. Enter the employee details. Then click Next. *All fields in blue are REQUIRED.*

Hire And Onboard A New Employee / **Employment Detail Information** (3/5)

Effective Date: 10/17/2019

Status:

Pull Into Payroll: ☐

POSITION DETAILS

Position:

Work Location (Default):

Department:

Reports To | ⓘ

Work Comp Code (Default):

Certified Code (Default):

Benefit Group:

EEO Class:

Time Off Group:

COMPENSATION

Employment Type:

Compensation Type:

Payroll Rule:

Pay Period | ⓘ

Worker Type: Non-Exempt

Compensable Hours | ⓘ

ADDITIONAL DETAILS

S Corp Owner: ☐

Business Owner: ☐

Percentage Of Ownership: %

Eligible For Section 125: ☑

Statutory Employee: ☐

Summer Clothing / Client #8052

BACK NEXT CLOSE

6. If your company uses job costing, enter it here. If not, click Next.

Hire And Onboard A New Employee / **Job Costing** (4/5)

Job Costing Code: | ⓘ

Job

Site

BACK NEXT CLOSE

7. **This step illustrates the email that will be sent to the new hire. You DO NOT need to do anything on this page. Click FINISH.**

Hire And Onboard A New Employee / **Onboarding Email Customization** (5/5)

①————————②————————③————————④

ONBOARDING EMAIL

Automatically Send Invitation ⓘ ☑

{EFIRSTNAME} {ELASTNAME}

Welcome to {PCOMPANYNAME}. Your worksite employer, {CCOMPANYNAME}, has entered into a co-employment relationship with {PCOMPANYNAME}. This strategic partnership is designed to the best possible employment experience to you. To continue your employee enrollment, please follow the link below and complete all of your information.

VERY IMPORTANT!!!
Below is a link to the employee handbook that, during your enrollment process, you will be asked to acknowledge that you have read and understand. Please make sure to review the handbook. file contains multiple handbook attachments, read the handbook that applies to the state you are working in.

Thank you and welcome aboard. Please click on the link below to start your enrollment process.

Summer Clothing / Client #8052   BACK   **FINISH**

You will be brought back to the "Onboarding New Hire List." The new hire will receive an email inviting them to begin their new hire onboarding.

👤 **Employees**   Overview   Onboarding   I-9 Forms

✅ Successfully Saved

Onboarding New Hire List

➕ Onboard New Employee 🔍 Search   Export ⌄ | Select Columns

Actions	Name	Hire Date ↑	Onboarding Status	Processed By
	🔍	🔍 📅	(All) ▾	🔍
Cancel Hiring | Overview | Verify Forms | Notes	Walling, Megan	9/9/2019	New Hire - Onboarding Finished	Tran, Anna

8. If the employee did not receive the email, you can regenerate the link. Be sure to tell the employee to check their spam/junk folder. To regenerate the link, click on the EMPLOYEES Menu on the sidebar, then click on the Onboarding tab at the top. Locate the new hire in the Onboarding New Hire List, then click Generate Link next to their name.

Cancel Hiring | **Generate Link** | Overview | Notes	test, test	10/1/2019	Admin - Invitation Sent

Part 2 – Verifying New Hire Information

Once the employee completes their portion of the online onboarding process, you will receive an email notification that states that the onboarding process is finished. Click on the blue ONBOARDING box and sign in to your account to complete the employer portion of the online onboarding.

1. You will be directed to a screen that shows you a List Of Forms To Be Completed. Skip Complete Data Verification and click on the blue Complete I-9 hyperlink to begin. The system will direct you to Page 2 of the Form I-9 - Employee Verification.

2. Enter the Employee's First Day of Employment, Select Document Type, enter the Document Title, Issuing Authority, Document Number and Expiration Date of the employee's identification provided. Check the Attestation box, then click Next. *All fields in blue are REQUIRED.*

Form I-9 / **Employee Verification** (1/3)

EMPLOYEE INFO FROM SECTION 1

First Name (Given Name)	Anna	Middle Initial	
Last Name (Family Name)	Tran	Citizenship/Immigration Status	A Citizen Of The United States

VERIFICATION

Employee's First Day Of Employment   10/28/2019

Select Document Type   ○ List A ● List B & List C

LIST B		**LIST C**	
Document Title	Driver's License Issued By State/T... ∨	Document Title	Social Security Card (Unrestricted) ∨
Issuing Authority	FL	Issuing Authority	SSA
Document Number	123456	Document Number	444-44-4444
Expiration Date (If Any)	1/1/2025	Expiration Date (If Any)	MM/DD/YYYY

OTHER INFORMATION

Additional Information

ATTESTATION

☑ I Attest, Under Penalty Of Perjury, That

(1) I have examined the documents presented by the above-named employee

(2) the above-listed documents appear to be genuine and tot relate to the employee named and

(3) to the best of my knowledge the employee is authorized to work in the United States.

NEXT   CANCEL

3. Verify your company information listed on this screen. Enter your job Title. Click Verify Signature to sign the form, then click Next.

Form I-9 / **Employer Information** (2/3)

EMPLOYER'S BUSINESS OR ORGANIZATION INFORMATION

Preset	Client
Name	Summer Clothing
Address	12936 Fargo Ln
City	Redding
State	California
ZIP	96003

EMPLOYER OR AUTHORIZED REPRESENTATIVE INFORMATION

Title	
First Name	Anna
Last Name	Tran

ATTESTATION

☑ E-Signature

The parties agree that this agreement may be electronically signed. The parties agree that the electronic signatures appearing are the same as handwritten signatures for purpose of validity

Verify Signature

BACK   **NEXT**

4. The identification information that was entered on Page 2 of the Form I-9 will populate into the form. Please review, then click Finish.

Form I-9 / **Review** (3/3)

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)	First Name (Given Name)	Middle Initial	Other Last Names Used (if any)
Tran	Anna	N/A	N/A

Address (Street Number and Name)	Apt. Number	City or Town	State	ZIP Code
11101 ROOSEVELT BLVD N	N/A	Saint PETERSBURG	FL	33716

Date of Birth (mm/dd/yyyy) | U.S. Social Security Number | Employee's E-mail Address | Employee's Telephone Number

BACK   **FINISH**   CANCEL

5. Once you've verified the forms, click Close and the system will direct you back to the Onboarding New Hire List.

Forms Verification	Actions

✓ Successfully Created

List Of Forms To Be Completed

✓ Complete Data Verification
✓ Complete I-9
• Document Signing

CLOSE

6. If the onboarding is complete, the system will display "New Hire – Onboarding Finished" under the Onboarding Status. This means that the employee has successfully completed their online onboarding and no further action is required.

Onboarding New Hire List

⊕ Onboard New Employee | 🔍 Search   Export

Actions	Name	Hire Date	↑ Onboarding Status	Processed By
	🔍 test	🔍	📅 (All) ▾	🔍
Take Control | Overview | Notes	Employee, Test	9/16/2019	New Hire - Onboarding Finished	Walling, Megan
Cancel Hiring | Overview | Verify Forms | Notes	test, test	10/1/2019	New Hire - Onboarding Finished	Tran, Anna
Take Control | Overview | Notes	Employee, Test	10/10/2019	New Hire - Onboarding Finished	Felsher, Colleen
Take Control | Overview | Notes	Employee, Test		Ready For ER	Banks, Tyra