



04/2021

PEO Client Onboarding New Hire Process

The Onboarding New Hire process includes four sections:

1. Employer Initiation

Set up the new hire in the system which generate a welcome email to the employee.
Login credentials will be the employee Social Security Number.

2. Employee Portion

Employees complete their New Hire Information.

3. Employer Verification

Verify and process the Employee's documents.

4. Propel Review

Your Payroll Specialist will receive notification and review data.

Reminders:

- Any field with a blue bar is a "required" field and must be completed. Email addresses and telephone numbers are needed. Enter any additional information you may have.
- You may wish to provide the Employee Section found on Pages to your New Hire to assist them in completing their documents.

Due to our ability to customize your set up, the Examples shown throughout this document may vary from your actual screens. Please contact us for assistance with any questions you might have.

Worklio Onboarding Instructions

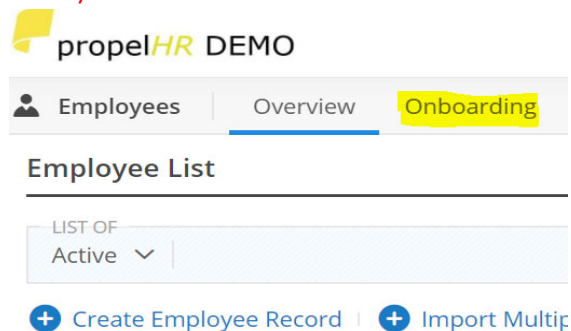
Pre-work – During the Job Offer

You will need the following information from your candidate **before you hire them in the system**:

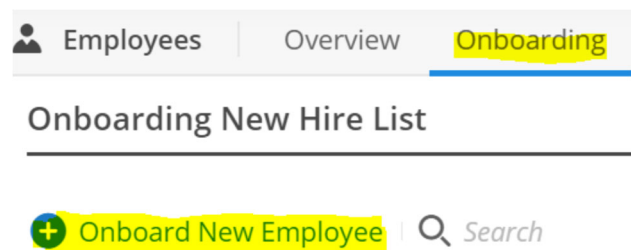
- Employee's Full Name (as it appears on their social security card)
- Employee's Social Security Number
- Employee's Email Address
- Employee's Hire Date (which is their first day of work)

Part 1 – Manager Initiation (Before the First Day of Work)

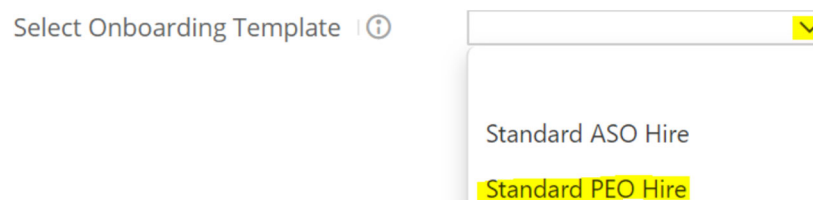
1. Log into the Worklio payroll system using your management access.
2. Once you have logged in, access your **Employee List**, then click the **Onboarding** tab at the top. (Note: Do NOT click the Create Employee Record.)



3. Click **Onboard New Employee** to begin.



4. Select the Onboarding Template – use the dropdown and select **Standard PEO Hire** and click **Continue**.



Worklio Onboarding Instructions

5. The next page, **Onboarding Setup Template**, is Propel HR use only. – **NO ACTION IS NEEDED**. Just click the **NEXT** button at bottom to continue.

You are now ready to start entering your employee information. *Note: the fields highlighted with blue are **REQUIRED***. You will not be able to continue without entering the blue fields. Once this information is entered, click **NEXT**.

6. **Employee Basic Information** - Enter the **Employee's First Name, Last Name, SS# and Email Address** (*this email address will be used to send notifications to the employee*).

Click **NEXT** at the bottom to continue.

7. **Employment Basic Information** - Enter the **Employee's Original Hire Date** (Employee's first day of work). *NOTE: No other information is needed on this page.*

Click **NEXT** at the bottom to continue.

8. **Employment Detail Information** - Use the dropdown boxes to complete required fields and all other fields such as *Position, Department, Reports To, Time Off Group and EEO Class*.

Skip the **Additional Details** section. Click **NEXT** to continue to the next page.

NOTE:

- **Compensable Hours are the number of hours the employee will work in a pay period.**

Example:

Here is a sample of a completed screen:

Hire And Onboard A New Employee / Employment Detail Information (3/4) Actions ▾

1

2

3

4

Effective Date

4/16/2021

Status

Active

Pull Into Payroll

POSITION DETAILS

Position

Customer Service

Work Location (Default)

SC - MAIN

Department

1 - Office

Work Comp Code (Default)

8810 - Clerical Office Employees ...

Certified Code (Default)

Benefit Group

REMA - All Eligible Employees

Benefit Group Assignment Date

MM/DD/YYYY

EEO Class

Professionals

Time Off Group

PTO-Vacation Hourly

COMPENSATION

Employment Type

Regular Full-Time

Compensation Type

Hourly

Payroll Rule

Weekly

Pay Period

Set From Payroll Rule

Worker Type

Non-Exempt

Compensable Hours

40

Hourly Rate

\$ 12.0000

Estimated Annual Wage

\$24,960.00

ADDITIONAL DETAILS

S Corp Owner

☐

Business Owner

☐

Percentage Of Ownership

%

Eligible For Section 125

☒

Statutory Employee

☐

943 Agricultural Employee

☐

Corporate Officer

☐

Exempt From Worker's Comp

☐

Highly Compensated Employee

No

Key Employee

No

Worklio Onboarding Instructions

9. Next, you use the dropdown menu to choose the correct **Job Costing**. This should be your **Location Number or Department**. Click **FINISH** at the bottom when completed.

You are finished with Part 1. The system will generate a Welcome Email to the Employee, including the link to complete their New Hire Information and instructions.

(You can view the following screen to confirm that your portion is done. Onboarding Status will state Invitation Sent as pictured below.)

Employees

Overview

Onboarding

Successfully Saved

Onboarding New Hire List

Onboard New Employee

Bulk Employee Onboarding

Search

Export

Select Columns

Actions	Employee ID	Name	Hire Date	Onboarding Status	Processed By
Cancel Hiring Generate Link Overview Notes Settings	18326	Employee, Test	1/31/2021	Admin - Invitation Sent	Emmons, Stephanie

20

50

100

Page 1 of 1 (1 items)

1

Worklio Onboarding Instructions

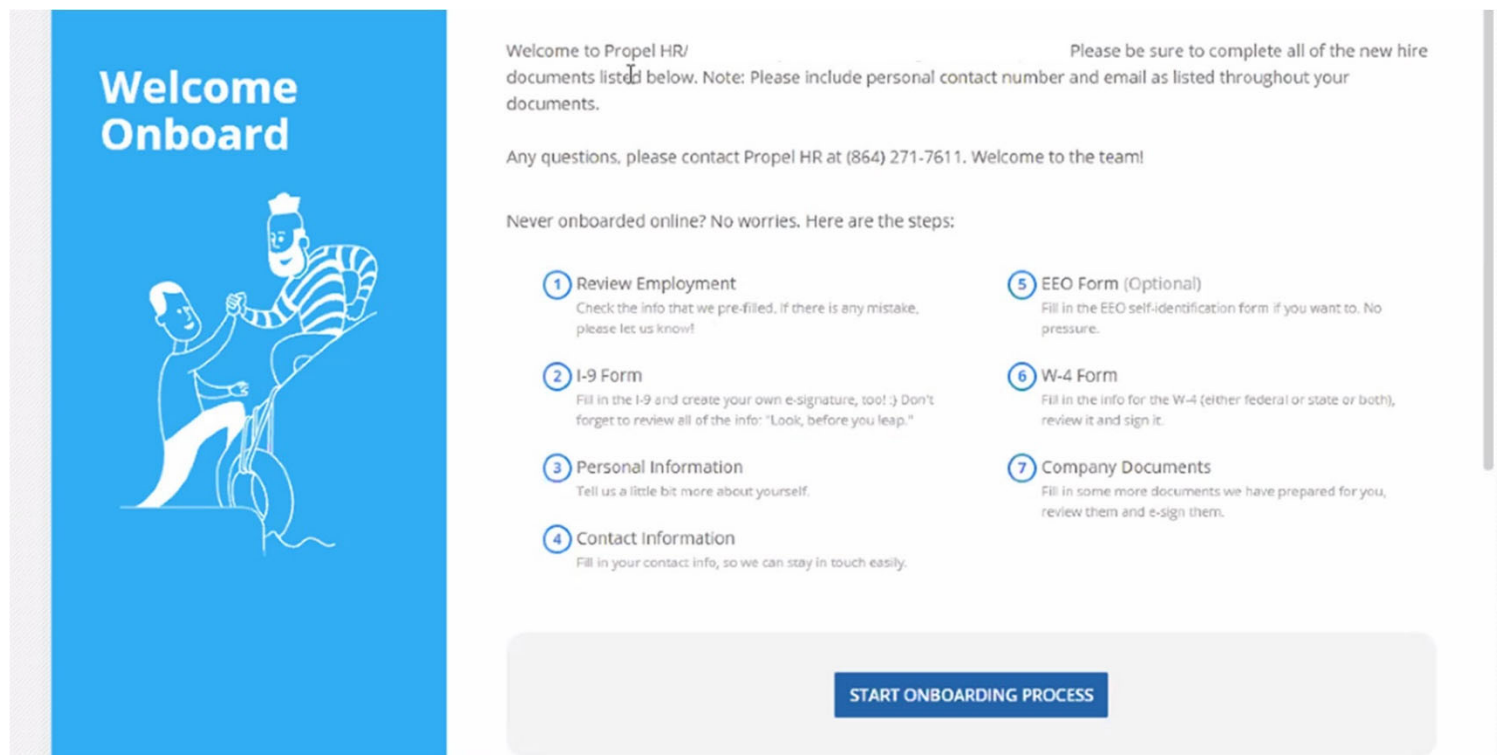
Part 2 - Employee Portion (Before the First Day of Work)

Note: You will need to have the following information available BEFORE you complete onboarding.

- **Social Security Number**
- **Bank Routing and Account Numbers** (if direct deposit is desired)
- **Federal and State Tax Withholding Information for W-4** (ask a parent if help is needed)

You will receive an email inviting you to start your new hire onboarding. Click **Start** to begin. Login using your **social security number**. (This will need to match the SSN given to the GM.) Click **Next**.

Click the **Start Onboarding Process** button at the bottom of the screen.



Welcome to Propel HR/ documents listed below. Note: Please include personal contact number and email as listed throughout your documents.

Please be sure to complete all of the new hire documents.

Any questions, please contact Propel HR at (864) 271-7611. Welcome to the team!

Never onboarded online? No worries. Here are the steps:

- 1 Review Employment
Check the info that we pre-filled, if there is any mistake, please let us know!
- 2 I-9 Form
Fill in the I-9 and create your own e-signature, too! :) Don't forget to review all of the info: "Look, before you leap."
- 3 Personal Information
Tell us a little bit more about yourself.
- 4 Contact Information
Fill in your contact info, so we can stay in touch easily.
- 5 EEO Form (Optional)
Fill in the EEO self-identification form if you want to. No pressure.
- 6 W-4 Form
Fill in the info for the W-4 (either federal or state or both), review it and sign it.
- 7 Company Documents
Fill in some more documents we have prepared for you, review them and e-sign them.

START ONBOARDING PROCESS

Important Onboarding Notes:

- Any field with a **blue bar** is a required field and must be completed, in addition to contact number and email.
- If the system times out while you are entering your information, you will be prompted to enter your SS# and continue where you left off.

Worklio Onboarding Instructions

1. **Employment Summary Approval** - Carefully review **Employment Summary Approval** page to see if Employment Information is correct. If everything is accurate, click **APPROVE AND CONTINUE** in the bottom right of the screen to continue.

Employee Onboarding / Employment Summary Approval (1/13)

1 2 3 4 5 6 7 8 9 10 11 12 13

Review Your Employment Details

EMPLOYEE INFO

First Name: Test

Last Name: Employee

Social Security Number: ***-**-2020 | Unmask

GENERAL EMPLOYMENT INFO

Start Date: 01/31/2021

POSITION INFO

Position: 5064 York

Home Division (Default): 64 York

Work Location (Default): Kitchen

Department: Emmons, Stephanie

COMPENSATION

Employment Type: Regular Part-Time

Compensation Type: Hourly

Pay Period: Semi-Monthly

Worker Type: Non-Exempt

Compensable Hours: 0.00

Hourly Rate: ***** | Unmask



REPORT WRONG DATA | **APPROVE AND CONTINUE** | CLOSE

If you feel something is incorrect, click **REPORT WRONG DATA** at the bottom right of the screen and enter a message detailing the item. When finished, click **REPORT** in the bottom right of the screen. Your message will be sent to your manager for correction. You will be notified when this is completed. Log back in and pick up where you left off entering your new Hire Information.

2. **I-9 Form** - Please complete the **I-9 Form**. A copy of the instructions to complete the I-9 form are available for download. After reading the statement, check ☐ **I Attest, That** which will open a form where you will complete your Personal Information, including your Email and Phone Number.

Employee Information and Attestation (I-9 Page 1) - You will be directed to the next screen to begin entering your Personal Information. **Please enter your Email and Phone Number in this step.**

Attestation - Check the appropriate response. Check **E-Signature** ☒ **E-Signature** . Click

 to sign the document electronically. You can either use your mouse and write your signature or click the  to use your keyboard and type your name. Click **SAVE** when finished.


Worklio Onboarding Instructions

I-9 Review - Review the three (3) pages of your **completed I-9 Form**, clicking **NEXT** to move to the next page.

Employee Onboarding / I-9 Review (4/13)

1 2 3 4 5 6 7 8 9 10 11 12 13

1 of 3 Automatic Zoom

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

USCIS
Form I-9
OMB No. 1615-0047
Expires 10/31/2022

▶ **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) Employee	First Name (Given Name) Test	Middle Initial N/A	Other Last Names Used (if any) N/A		
Address (Street Number and Name) 2040 Tiger Paw Lane		Apt. Number N/A	City or Town York	State SC	ZIP Code 29745
Date of Birth (mm/dd/yyyy) 02/02/2000	U.S. Social Security Number 250 - 20 - 2020	Employee's E-mail Address N/A		Employee's Telephone Number N/A	

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

BACK **NEXT** CLOSE

3. **Personal Information** - Gender is a required field and must be completed. If you wish, complete the other information. **NOTE: Driver's License information does NOT need to be completed.**

Employee Onboarding / Personal Information (5/13)

1 2 3 4 5 6 7 8 9 10 11 12 13

PERSONAL INFORMATION

Social Security Number	***-**-2020 Unmask	Date Of Birth	2/2/2000
Salutation	Mr.	Gender	Male
First Name	Test	Citizenship	A Citizen Of The United States
Last Name	Employee	Driver's License Number	
Middle Name		Driver's License Expiration Date	MM/DD/YYYY
Other Last Names User (If Any)		Driver's License Class	
Nickname		Driver's License State	
Suffix			

Worklio Onboarding Instructions

4. **Contact Information** - Enter any additional **Contact Information**.

If you use an **Alternate Mailing Address**, such as a P.O. Box, enter it.

Emergency Contact – enter your emergency contact information. When finished, click **NEXT** in the bottom right of the screen to continue.

Employee Onboarding / Contact Information (6/13)

1 2 3 4 5 6 7 8 9 10 11 12 13

RESIDENTIAL ADDRESS (PHYSICAL ADDRESS)

Address: 2040 Tiger Paw Lane
Apt. Number:
City Or Town: York
State: South Carolina
ZIP Code: 29745

CONTACT INFORMATION

Personal Phone: () - - - -
Personal Cell Phone: (864) 999-9999
Personal Email Address: propelhr@yahoo.com
Company Cell Phone: () - - - -
Company Phone: () - - - - Ext:
Company Email Address:

ALTERNATE MAILING ADDRESS

Setup Alternate Address: ☐

EMERGENCY CONTACT

Setup Emergency Contact: ☒

First Name:
Last Name:
Phone: () - - - -
Alternate Phone: () - - - -
Email Address:
Relationship:
Note:

BACK NEXT CLOSE

5. **EEO Identification** - This information is used for Equal Employment Opportunity reporting purposes. We ask you to supply it so that we can generate government-mandated statistics.

When finished, click **NEXT** in the bottom right of the screen to continue.

Worklio Onboarding Instructions

6. **Tax Withholding** - Complete your **Federal W-4 Form** and your **State W-4 Form** (if applicable). The W-4 worksheet or online IRS Calculator is available for your use, if you wish. This can be done by clicking [IRS Calculator](#).

When finished, click **NEXT** in the bottom right of the screen to continue.

Employee Onboarding / Tax Withholding (8/13)

1 2 3 4 5 6 7 8 9 10 11 12 13

Federal Tax

Use the W-4 worksheet or the online IRS Calculator.

STEP 1 - PERSONAL INFORMATION

SSN: ***-**-2020 [Unmask](#) Address: 2040 Tiger Paw Lane

First Name and middle initial: Test City Or Town, State and ZIP Code: York, SC 29745

Last Name: Employee

Filing Status: Select Head of Household only if you're unmarried and pay more than half the costs of keeping up a home for yourself and a qualifying individual.

Single or Married filing separately

EXEMPTION FROM WITHHOLDING

☐ I claim exemption from withholding and I certify that I meet both of the following conditions:

- I had no federal income tax liability in 2020, and
- I expect to have no federal income tax liability in 2021

If you claim exemption, you will have no income tax withheld from your paycheck and may owe taxes and penalties when you file your 2021 tax return. You will need to submit a new Form W-4 by February 15, 2022.

STEP 2 - MULTIPLE JOBS OR SPOUSE WORKS

☐ I claim both of the following conditions applies and I want to check the box 2(c) on Form W-4:

- I hold more than one job at the time, or I'm married filing jointly and my spouse also works.
- There are only two jobs total.

STEP 3 - CLAIM DEPENDENTS

☐ My total income will be \$200,000 or less (\$400,000 or less if married filing jointly)

BACK NEXT CLOSE

Deductions: \$

Tax Withholding Resident State (South Carolina)

See SC W4 for more information

Marital Status

Note: If Married filing separately, check "Married, but withhold at higher Single rate".

If your last name is different on your Social Security card, check here.

☐

Total number of allowances you are claiming

Additional amount, if any, you want withheld from each paycheck

\$

EXEMPTION

I claim exemption from withholding for 2021. Check the box for the exemption reason:

For tax year 2020, I had a right to a refund of all South Carolina Income Tax withheld because I had no tax liability, and for tax year 2021 I expect a refund of all South Carolina Income Tax withheld because I expect to have no tax liability.

☐

I elect to use the same residence for tax purposes as my military servicemember spouse. I have provided my employer with a copy of my current military ID card and a copy of my spouse's latest Leave and Earning Statement.

BACK NEXT CLOSE

Worklio Onboarding Instructions

W-4 Form Review - Review and Sign your completed Federal W-4 and State Withholding forms. Click **Next** at the top right **Next** Accept and Sign to move from your Federal form to your State form. If changes need to be made on either form, click **BACK** at the bottom right of your screen. After confirming the forms are completed correctly, check **I Declare**. To sign the forms, click **Verify Signature** and **VERIFY**. When finished, click **NEXT** in the bottom right of the screen to continue.

Employee Onboarding / W-4 (9/13)

W-4 1 of 2 Previous Next

1 2 3 4 5 6 7 8 9 10 11 12 13

W-4 Form (Rev. December 2020) Department of the Treasury Internal Revenue Service

Employee's Withholding Certificate OMB No. 1545-0074

Complete Form W-4 so that your employer can withhold the correct federal income tax from your pay. Give Form W-4 to your employer. Your withholding is subject to review by the IRS.

Step 1: Enter Personal Information

(a) First name and middle initial: Test Last name: Employee (b) Social security number: 250-20-2020

Address: 2040 Tiger Paw Lane City or town, state, and ZIP code: York, SC 29742

(c) ☒ Single or Married filing separately ☐ Married filing jointly or Qualifying widow(er) ☐ Head of household (Check only if you're unmarried and pay more than half the costs of keeping up a home for yourself and a qualifying individual.)

Does your name match the name on your social security card? If not, to ensure you get credit for your earnings, contact SSA at 800-772-1215 or go to www.ssa.gov.

Step 2: Multiple Jobs or Spouse Works

Complete this step if you (1) hold more than one job at a time, or (2) are married filing jointly and your spouse also works. The correct amount of withholding depends on income earned from all of these jobs. Do only one of the following.

(a) Use the estimator at www.irs.gov/W4App for most accurate withholding for this step (and Steps 3-4); or

(b) Use the Multiple Jobs Worksheet on page 3 and enter the result in Step 4(c) below for roughly accurate withholding; or

(c) If there are only two jobs total, you may check this box. Do the same on Form W-4 for the other job. This option is accurate for jobs with similar pay; otherwise, more tax than necessary may be withheld. ☐

TIP: To be accurate, submit a 2021 Form W-4 for all other jobs. If you (or your spouse) have self-employment income, including as an independent contractor, use the estimator.

Complete Steps 2-4 ONLY if they apply to you; otherwise, skip to Step 5. See page 2 for more information on each step, who can claim exemption from withholding, when to use the estimator at www.irs.gov/W4App, and privacy.

Complete Steps 3-4(b) on Form W-4 for only ONE of these jobs. Leave those steps blank for the other jobs. (Your withholding will be most accurate if you complete Steps 3-4(b) on the Form W-4 for the highest paying job.)

Step 3: If your total income will be \$200,000 or less (\$400,000 or less if married filing jointly):

Accept and Sign

WARNING
You must review 1 document(s). Click NEXT above the document to review them all. Then please check, accept and sign the document(s).

☐ I Declare
Under penalties of perjury, I declare that I have examined these certificates and, to the best of my knowledge and belief, they are true, correct, and complete. I confirm that I have read and agree to these documents.

☒ E-Signature
The parties agree that this agreement may be electronically signed. The parties agree that the electronic signatures appearing on this agreement are the same as handwritten signatures for the purposes of validity, enforceability, and admissibility.

Test Employee

Verify Signature

BACK NEXT CLOSE

7. Direct Deposit Setup – (Use this option to send your paycheck directly to your bank.) Click **+ Add New Bank Account** to add your direct deposit. Add your banking information as listed below:

Add Bank Account

ACCOUNT DETAILS

Account Type: Checking

Account Number: 123456

Routing Number: 053207766 WELLS FARGO BANK

Account Holder Name: Test Employee

ALLOCATION DETAILS

Pay Into This Account: Percentage

Percent: 100%

When finished, click **NEXT** in the bottom right of the screen to continue.

Worklio Onboarding Instructions

8. **Custom Fields** - Do you wish to use a **Paycard** instead of a bank account? If not, use the dropdown and select **No**. If you do, use the dropdown and select **Yes** and complete the **All** information in this section to include **Consent for Electronic W-2**.

When finished, click **NEXT** in the bottom right of the screen to continue.

The screenshot shows the 'Custom Fields For Documents' form, step 11 of 13. At the top, a progress bar indicates the current step. The form asks 'Do you wish to use Paycard for Direct Deposit?' with a dropdown menu set to 'Yes, I will use PayCard.' Below this, a section titled 'If Yes, Complete Information Below:' contains input fields for 'Employee Name', 'Employee SSN', 'Employee Date of Birth', 'Employee Address (Street, City, State Zip)', and 'Employee Phone'.

9. **Documents Acknowledgement** - Here you will find several documents for your review. **Each document must be reviewed.** Click **Next** at the top right **Accept and Sign** to move to the next form. When finished, check ☒ **I Declare**. **To sign the forms, click Verify Signature and VERIFY.** When finished, click **NEXT** in the bottom right of the screen to continue.

The screenshot shows the 'Documents Acknowledgment' form, step 12 of 13. The form displays a document titled 'Master Electronic Disclosure and Consent Agreement' (1 of 8). The document content includes a warning to review 7 documents, a declaration section with 'I Declare' and 'E-Signature' options, and a 'Paper Copies' section. On the right side of the form, there is a 'Test Employee' field and a 'Verify Signature' button. At the bottom right, there are 'BACK', 'NEXT', and 'CLOSE' buttons.

Worklio Onboarding Instructions

10. **Signing Documents Summary** - The Documents you have completed or acknowledged are available for you to download for your records. Click **Download** next to the document you wish to download. Click **FINISH** in the bottom right of your screen.

Employee Onboarding / Signing Documents Summary (13/13)

Download All | Search

Actions	Document Name
Download	Master Electronic Disclosure and Consent Agreement
Download	Harassment & Substance Abuse Policy Acknowledgement
Download	Marketplace Coverage Options
Download	Employee Worksite Notice
Download	PayCard Authorization Form
Download	Employee Handbook - Sonic (SC Only) rev 01.2020
Download	Handbook Acknowledgement - Sonic (SC Only)
Download	Tip Reporting - Acknowledgement.docx
Download	I-9 Form
Download	W-4 Form
Download	W-4_SC.pdf

20 50 100 Page 1 of 1 (11 items) **FINISH**

11. **You are done!** Once you see the screen that says **Your Onboarding is Complete**, that's it.

Your Onboarding is Complete

Thank you Test and welcome aboard!

Please remember to bring your identification for Form I-9 and bank information on your first day.

Master Electronic Disc...	Harassment & Substan...	Marketplace Coverage ...	Employee Worksite Not...
PayCard Authorization ...	Employee Handbook - ...	Handbook Acknowledg...	Tip Reporting - Acknow...

On your first day of work, you will need to bring your **unexpired ID(s)** that establish your identity and work authorization and a **voided check or bank document** if you choose to have your paycheck deposited into your bank account so that your manager can complete the next step.

Worklio Onboarding Instructions

Part 3 – Manager Verification (Employee's First Day of Work)

1. **Email Notification** – You will get an email notifying you that the employee has completed their section.
 - Click the **Onboarding** button to begin the **Employer Verification of the Employee's Documents**.
or
 - Click **Verify** from the employee onboarding screen to begin the **Employer Verification of the Employee's Documents**.
2. **Forms Verification** – You will be asked to verify information provided by the employee. Begin with the first item in the list, click on the **Blue Words** to open the form.

List Of Forms To Be Completed

- [Complete Net Pay Allocation](#)
 - [Tax Setup](#)
 - [Complete I-9](#)
 - [Document Review/Signing](#)

Complete Net Pay Allocation Review the information provided. **No action is required here. You simply have to review what is entered** and click **Next**.

Actions	Type	Account Number	Routing Number	Account Holder Name	Account Type	Amount	Percent	Require Pre-Note	Days To Wait After Pre-Note	General
Edit Remove	Direct Deposit	123456	053207766	Test Employee	Checking	-	100	No	-	-

Tax Setup Verification - Enter the **Effective Date (Hire Date)** and click **NEXT**. Verify **Residential and Work Addresses**. Click **EDIT** on the Employee's Residential Address. Review/Verify the information, update if needed and click **Save**. Click **NEXT** when finished.

Residential Address must be verified for payroll - please click Edit and Save.

Effective Date: 01/31/2021

Residential Address: 2040 Tiger Paw lane, York, SC 29745

Primary Work Location (SUTA AND MULTIPLE WORKSITE): 1560 E Alexander Love Hwy, York, SC 29745

Additional Information: Tax Setup Note

Other Work Location: No data

Worklio Onboarding Instructions

Review the **Federal and State Exemptions** provided by the Employee. Click **FINISH** in the bottom right of your screen. **Note: you should not make any changes to this screen.**

I-9 Verification - Next, select the option for **Complete I-9**. Select the **Document Type** by checking the appropriate list(s). Enter the information from the documents provided by the Employee. Attestation – check **I Attest, Under Penalty of Perjury, That** and click **Next**.

Verify the Business or Organization Information. Enter your **Title**. Check E-Signature. Click **SAVE** when finished. When finished, click **NEXT** in the bottom right of the screen to continue.

Worklio Onboarding Instructions

Review the completed I-9 form. If changes are needed, click **back** in the lower right of your screen. When finished, click **FINISH**.

Form I-9 / Review (3/3)

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

Form I-9
OMB No. 1615-0047
Expires 10/31/2022

▶ 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)
Employee	Test	N/A	N/A

Address (Street Number and Name)	Apt. Number	City or Town	State	ZIP Code
2040 Tiger Paw Lane	N/A	York	SC	29745

Date of Birth (mm/dd/yyyy)	U.S. Social Security Number	Employee's E-mail Address	Employee's Telephone Number
02/02/2000	250-20-2020	N/A	N/A

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

BACK FINISH CANCEL

NOTE: You will need to upload copies of the employee's supporting documents at the end of the onboarding process.

Document Review/Signing - Here you will find several documents for your review. Each document must be reviewed.

Click **Next** at the top right to move to the next form. When finished, check **I Declare** and click **Save**.

Document Signing

Harassment & Substance Abuse Policy Acknowledgement 2 of 8 Previous Next

1 of 2 Automatic Zoom

CONSENT TO RECEIVE, REVIEW, ACCESS, SIGN, & AUTHENTICATE CERTAIN DOCUMENTS, FORMS, LETTERS, & OTHER INFORMATION ELECTRONICALLY
(\"E-Signature Disclosures & Consent\")

PLEASE READ THE FOLLOWING CAREFULLY.

By checking the box below, and proceeding forward to the next screen, you are agreeing to electronically access, receive, review, sign, and authenticate certain employment-related documents, forms, and/or letters (\"Materials\") covered by the federal Electronic Signatures in Global and National Commerce Act (\"E-SIGN\"), various state electronic transactions acts (\"ETAs\"), and/or the separate state laws of Illinois, New York, and Washington.

These E-Signature Disclosures & Consent apply to all Materials, both current and future, related to your application for or possible employment with Propel HR and/or its client. You are not required to receive notices and disclosures or sign documents electronically. If you prefer not to do so, you may request to receive paper copies and withdraw your consent at any time as described below.

By checking the box below, and proceeding forward to the next screen, you are agreeing that your electronic signature is the equivalent of your handwritten (or wet) signature, with all the same legal and binding effect. In certain cases throughout your employment, you may be asked to click buttons labeled \"I Agree,\" \"I Acknowledge,\" or using similar words, or otherwise electronically to acknowledge, accept, review, etc. Materials. These E-Signature Disclosures & Consent apply to those instances as well. You also understand that, in its sole discretion, Propel HR and/or its client may mail, hand-deliver, communicate, or otherwise send you hard-copy Materials.

WARNING
You must review 6 remaining documents before you can accept and sign.

☐ I Declare
Under penalties of perjury, I declare that I have examined this document and, to the best of my knowledge and belief, it is true, correct, and complete. I confirm that I have read and agree to these documents.

SAVE CANCEL

Worklio Onboarding Instructions

Important Note About PayCard Acknowledgement Form

The screenshot shows a 'Document Signing' window with a 'PayCard Authorization Form' selected. The form is titled 'AUTHORIZATION AGREEMENT PayCard Visa Payroll Card (Direct Deposit Option)'. It asks 'Do you wish to use PayCard for Direct Deposit?' with the option 'Yes, I will use PayCard' selected. A signature 'Test Employee' and the date '1/28/2021' are visible. Below the signature, it states 'The parties agree this document may be electronically signed...' and 'If Yes, Complete Information Below:'. A section titled 'COMPLETE INFORMATION BELOW TO ENROLL IN PAYCARD VISA PAYROLL CARD' lists 'Client: Florence/Myrtle Beach Management Group LLC' and 'Employee Name: Test Employee'. On the right, there is an 'Accept and Sign' section with a warning: 'WARNING You must review 3 remaining documents before you can accept and sign.' and a declaration checkbox 'I Declare' with a text box for a declaration. At the bottom right are 'SAVE' and 'CANCEL' buttons.

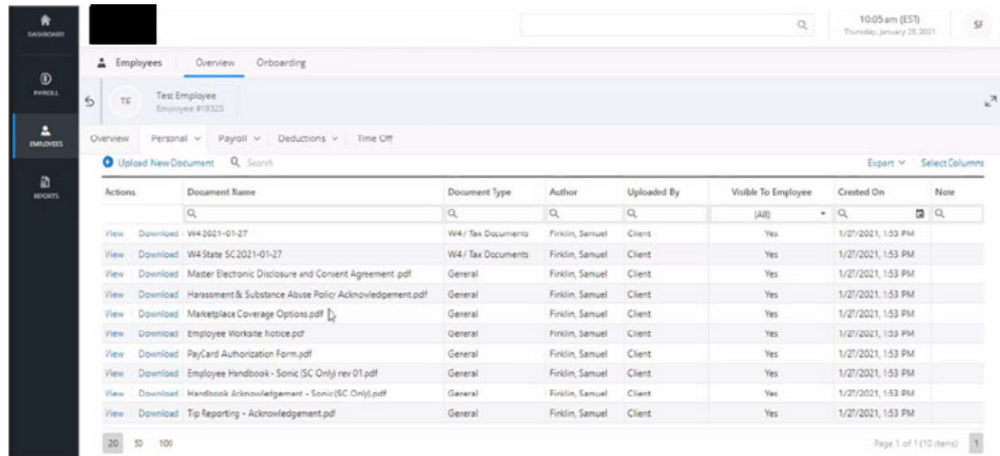
- All employees must complete this form, even if they are getting a direct deposit.
- If an employee does not complete direct deposit and declined pay card form, they will receive a live check.
- Employees who do not supply a voided check with their direct deposit form will also receive a live check.

Once you have reviewed all of the required Forms, you will need to click the **Finish Onboarding** button.

The screenshot shows a 'Forms Verification' window. At the top, it says 'Successfully Created' with a green checkmark icon. Below this is a section titled 'List Of Forms To Be Completed' with a list of four items, each preceded by a checkmark: 'Complete Net Pay Allocation', 'Tax Setup', 'Complete I-9', and 'Document Review/Signing'. At the bottom right, there are two buttons: 'FINISH ONBOARDING' and 'CLOSE'.

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3. **Upload Supporting Documents** - (I-9 documentation, voided check for Direct Deposit, etc.). Open the Employee Profile from the **Employee** option on the left side of your screen in black margin to see your active employee list. Select the appropriate Employee and click **Details**. Under the **Personal** Tab, select **Documents**. Then, you will see an option to **Upload New Document**.



Actions	Document Name	Document Type	Author	Uploaded By	Visible To Employee	Created On	Note
View Download	W4 2021-01-27	W4 / Tax Documents	Finklin, Samuel	Client	Yes	1/27/2021, 1:53 PM	
View Download	W4 State SC 2021-01-27	W4 / Tax Documents	Finklin, Samuel	Client	Yes	1/27/2021, 1:53 PM	
View Download	Master Electronic Disclosure and Consent Agreement.pdf	General	Finklin, Samuel	Client	Yes	1/27/2021, 1:53 PM	
View Download	Harassment & Substance Abuse Policy Acknowledgement.pdf	General	Finklin, Samuel	Client	Yes	1/27/2021, 1:53 PM	
View Download	Marketplace Coverage Options.pdf	General	Finklin, Samuel	Client	Yes	1/27/2021, 1:53 PM	
View Download	Employee Worksite Notice.pdf	General	Finklin, Samuel	Client	Yes	1/27/2021, 1:53 PM	
View Download	PayCard Authorization Form.pdf	General	Finklin, Samuel	Client	Yes	1/27/2021, 1:53 PM	
View Download	Employee Handbook - Sonic (SC Only) rev 01.pdf	General	Finklin, Samuel	Client	Yes	1/27/2021, 1:53 PM	
View Download	Handbook Acknowledgement - Sonic (SC Only).pdf	General	Finklin, Samuel	Client	Yes	1/27/2021, 1:53 PM	
View Download	Tip Reporting - Acknowledgement.pdf	General	Finklin, Samuel	Client	Yes	1/27/2021, 1:53 PM	

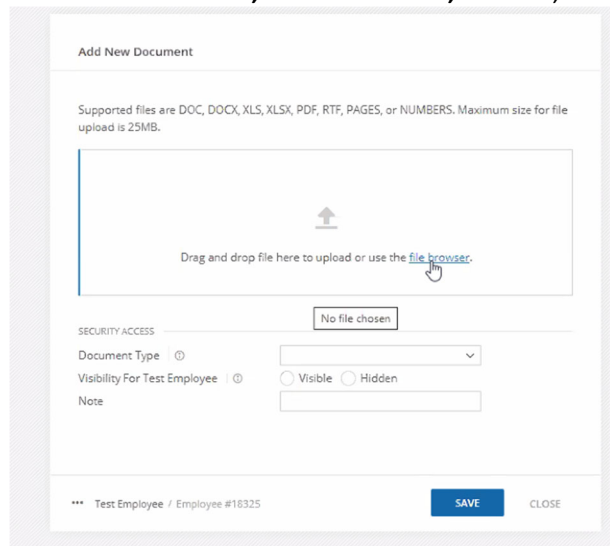
Next, you will need to upload your document by using the **file browser** link to search for your file name on your PC or by dragging and dropping the file from your desktop.

Document Type:

- Select **E verify** for identification.
- Select **Direct Deposit** for voided check or bank information.

Visibility – Select **Visible**

Name – Type name of document such as **Voided Check, Drivers License, SS Card, etc....**



Add New Document

Supported files are DOC, DOCX, XLS, XLSX, PDF, RTF, PAGES, or NUMBERS. Maximum size for file upload is 25MB.

Drag and drop file here to upload or use the [File browser](#).

No file chosen

SECURITY ACCESS

Document Type

Visibility For Test Employee ☒ Visible ☐ Hidden

Note

*** Test Employee / Employee #18325 SAVE CLOSE