Dominion Payroll®

Onboarding (Client)

Adaptive Employee Experience

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Overview

This document outlines what your employees will see when you initiate Employee Onboarding in the Adaptive Employee Experience.

Employee Onboarding in the Adaptive Employee Experience offers the full range of functionality users already enjoy in isolved Employee Onboarding, with the added benefit of accessibility from multiple devices. A single point of entry through a secure, progressive web application allows new hires to submit their information and complete all onboarding tasks from any device.

Legal Services

This service may need to be enabled for your company. Please contact your service bureau for further assistance if you are unsure if you have access to Onboarding or the Adaptive Employee Experience.

Once Cloudservice is enabled together with isolved Onboarding, new hires are automatically redirected to the Adaptive Employee Experience upon accessing the link that is included in the "Onboarding Initiated" email.

Set up Onboarding

Onboarding templates, along with supporting workflow routes and page messages, must be configured for Onboarding to work in the Adaptive Employee Experience.

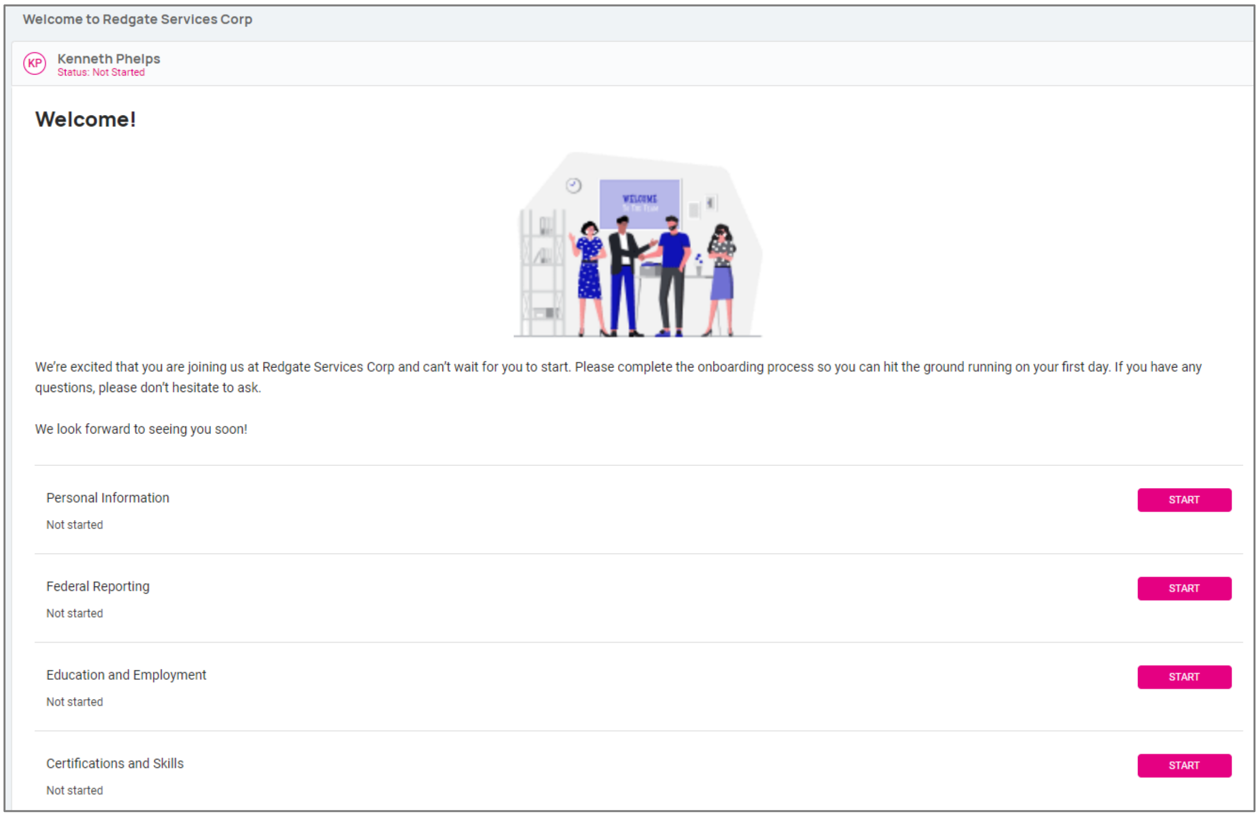
Each onboarding template can be configured to include specific sections:

- Name and Address
- Personal and Contact Information
- Disability Self-Identification
- VETS Self-Identification
- Form I-9 Certification
- Tax Information
- Employee Contacts
- Prior Employment
- Certifications
- Education
- Skills
- Direct Deposit
- Miscellaneous Fields
- WOTC Certification
- Supporting Documents

Using Onboarding

A new employee receives an email with a link to first set up their account. Once they create a password and challenge question, they will be able to log in to isolved.

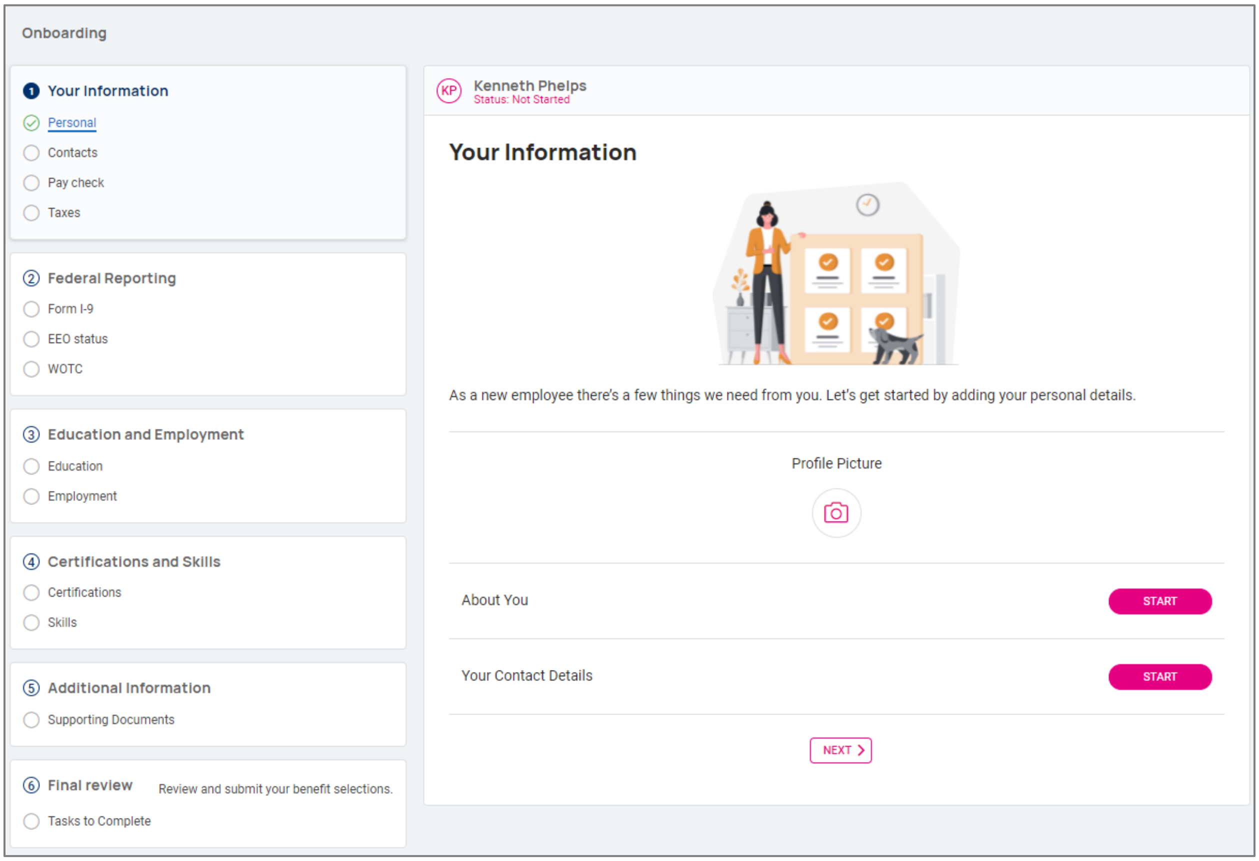
When the new hire logs in, they are presented with the options that are chosen to be included in the template. The Welcome page groups together similar items for convenience, creating a cohesive and simple starting point for entry of data.



Personal Information

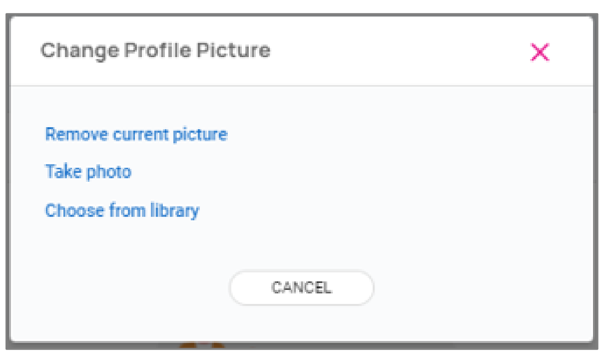
When the employee selects the Start button in the "Personal Information" section, a new page and options appear. This section has some fields that are required for all new hires, including their name, address, and other basic information that is always collected, and also includes additional fields that are optional for the employee to fill in. Also included in the Personal section is an area to fill in SSN or other tax ID and contact information such as phone numbers and personal email address.

Let's look a little closer at this page and the elements that go with it.



Profile Picture

The very first section on the screen allows the employee to add a profile picture. This is done by selecting the camera icon below the words "Profile Picture." This brings up the options for the employee as shown below. The employee can select any of the options to add their photo. This is not required.

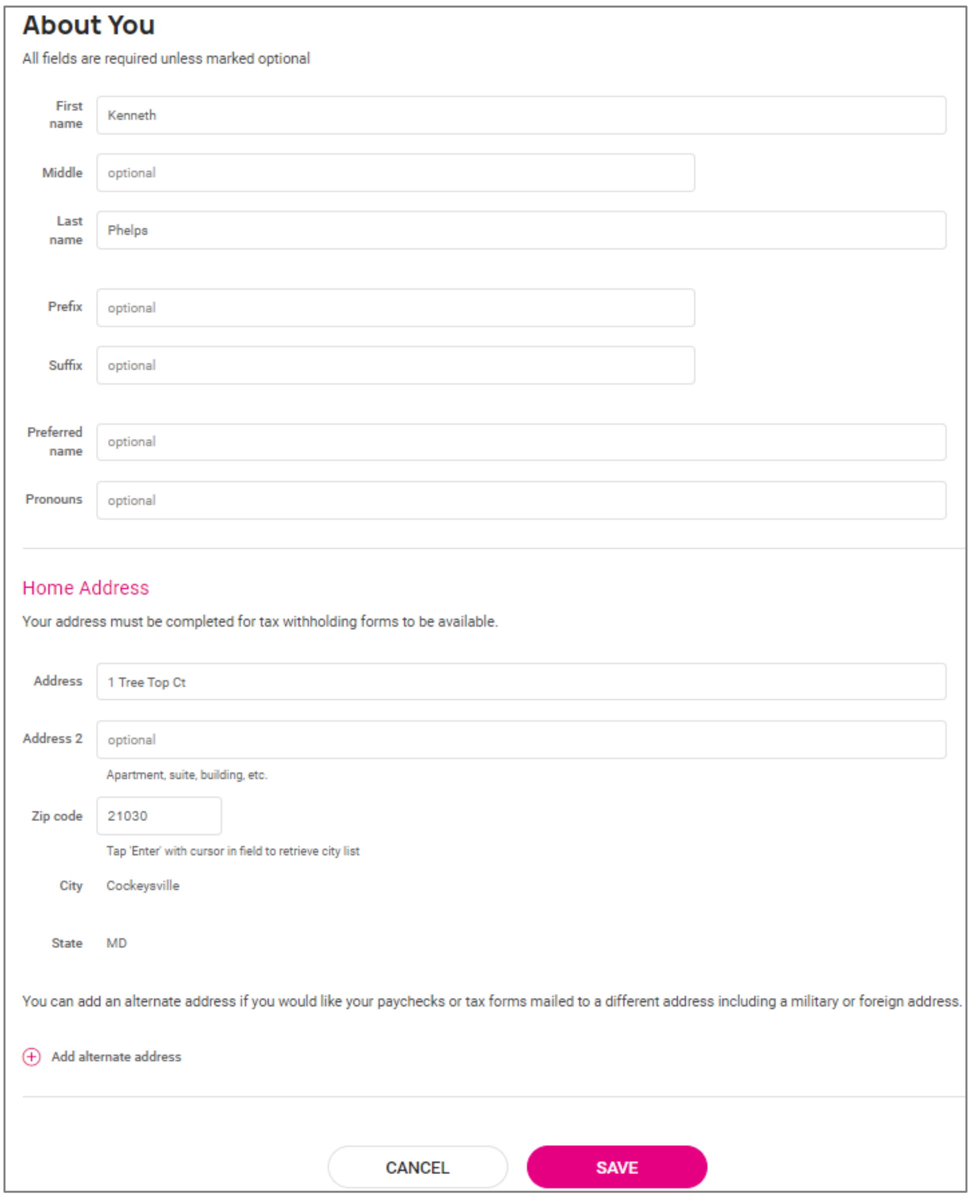


About You

The next section is titled **About You** and asks the employee for information starting with their first and last name, preferred name, and other options. Fields with the word "optional" are exactly that; they may enter, for example, their preferred name, however, if they usually go by their first name then they aren't required to enter anything in the field. There is also a section for pronoun to help better identify how the employee would like to be addressed such as he/she/they, etc.

Note: This option is currently only available in the AEE Onboarding module.

The home address is next and the employee is prompted to enter their address and Zip code. That will bring up the city and state automatically. This page also has space for adding an alternate address, if applicable, by clicking the plus sign next to "Add Alternate Address."



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

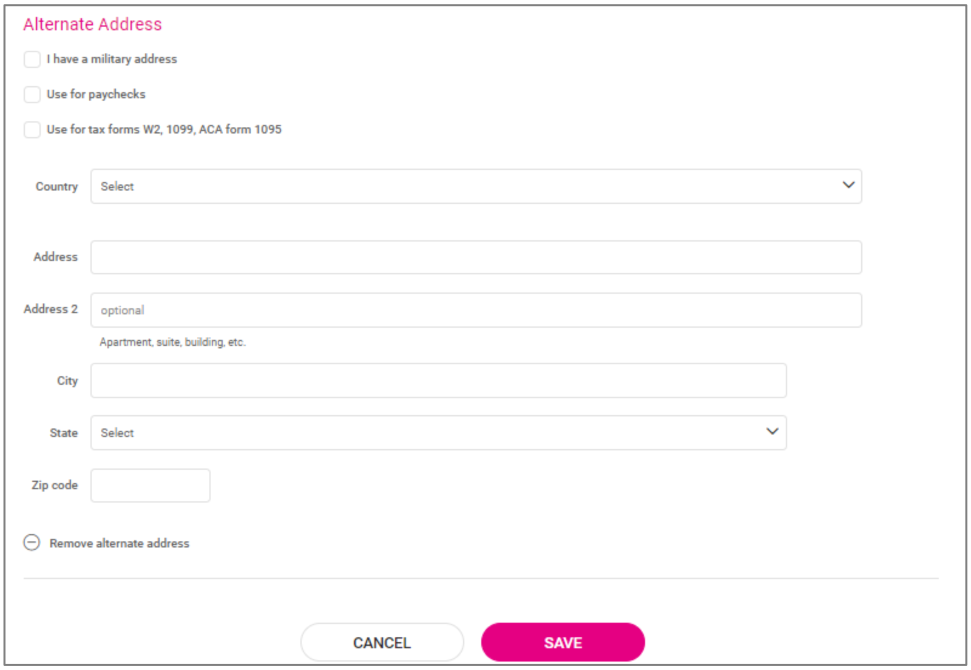
State: MD

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

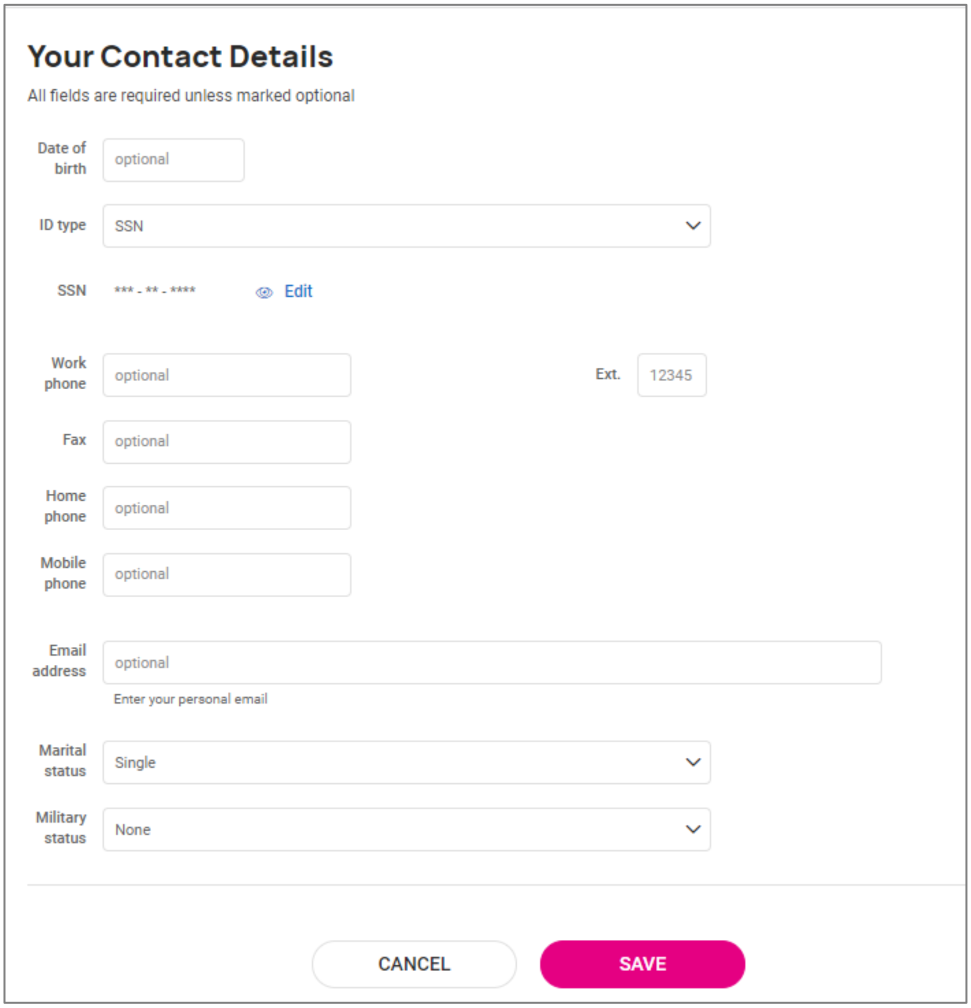
CANCEL SAVE

New employees can use the **Alternate Address** section to add a mailing address for their paycheck or tax forms. Military and foreign addresses are supported.



Your Contact Details

This section is a required part of the template and allows the employee to add birth date, SSN, and phone numbers. The SSN section is required by default; other fields can be required and hidden per-template. If the employee does not have a social security number, they will also have the option to select another ID type to enter. An example of when this might be used is if they are working for you on a special visa; the employee would select "Other" in the **ID Type** section then enter the visa number below. If using onboarding for independent contractors, they could select "EIN" as the type then enter their EIN. This is a validated field for SSN/EIN entry.

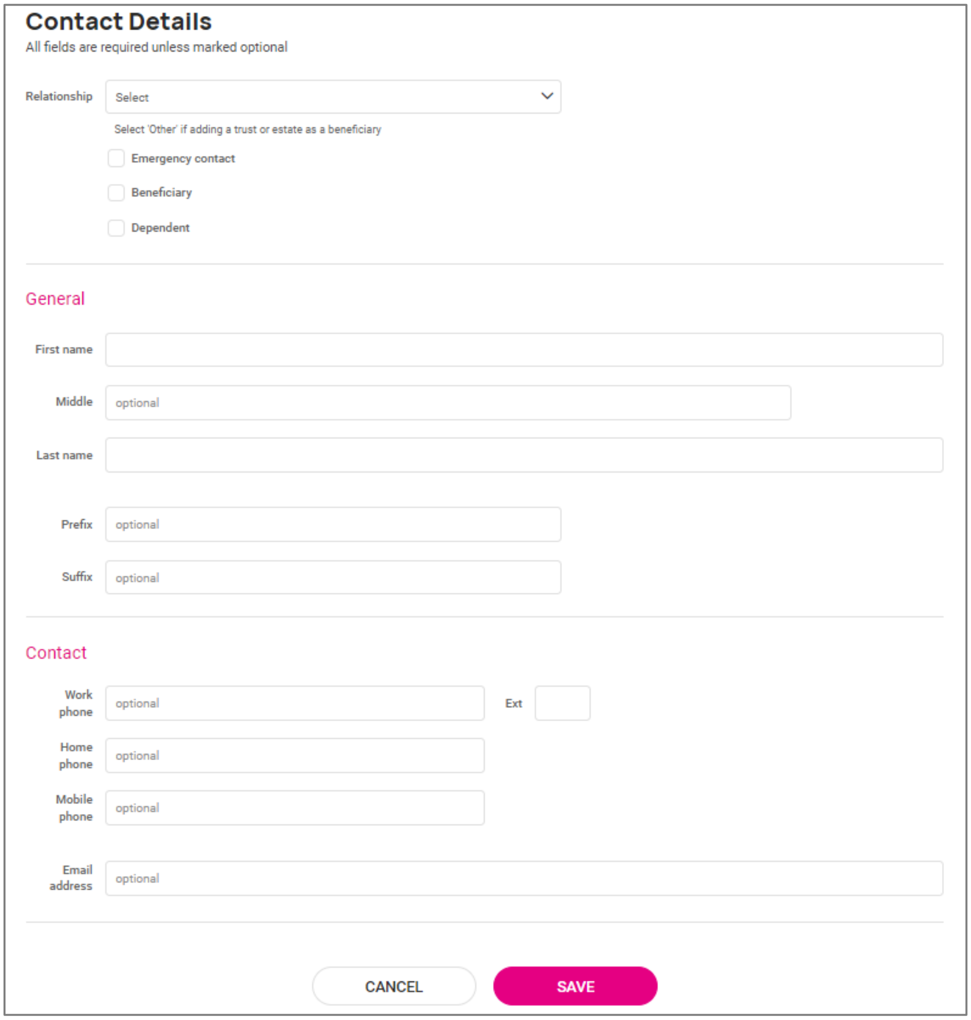


Contact Details

This page is an option to include in the template. An additional option is to add a message directly to the page which can include any instructions for the employee. This is where the employee can enter details about their contacts. The employee is able to choose a Relationship which best fits the contact type (such as "Spouse" or "Child") from the drop-down menu. They can then select the contact type, checking one or more of the following options:

- Emergency contact
- Beneficiary
- Dependent

One or all types can be selected. The information requested and required on this screen may change based on the type(s) selected on this page.

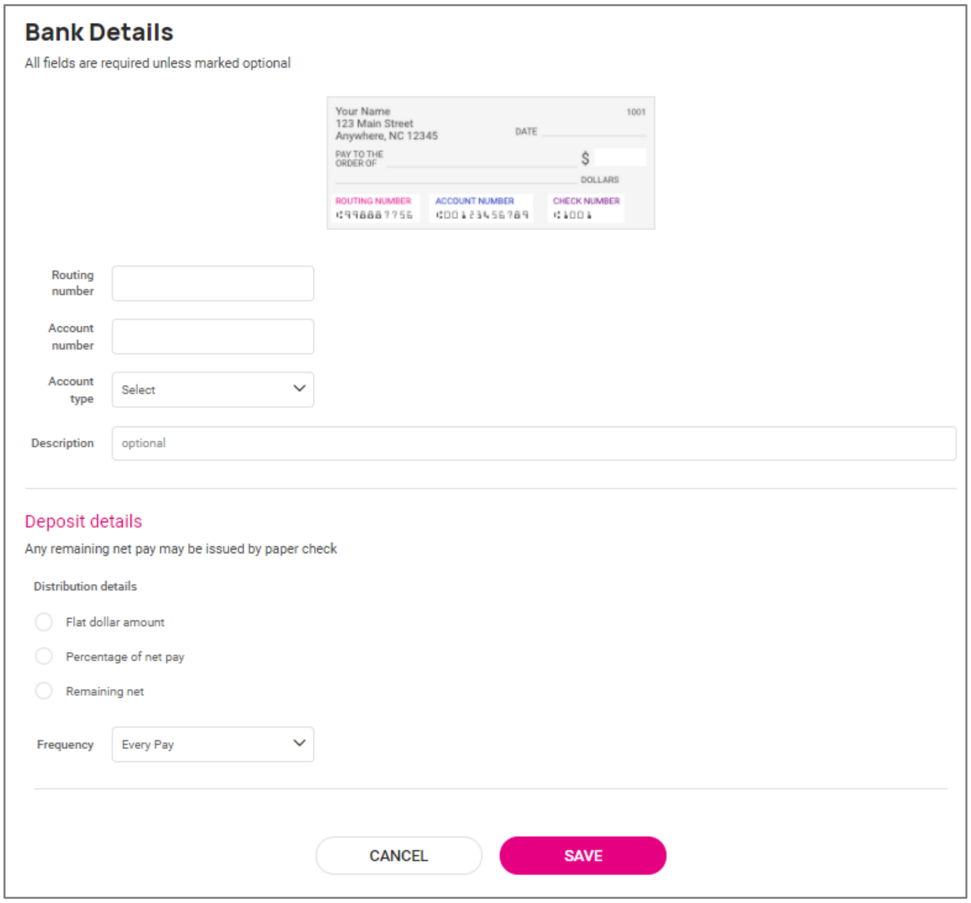


Pay Check

When enabled, the employee is able to add details for their direct deposit on this screen. There is a sample of what their personal check might look like in order to give them an idea of where to find the information that is being requested of them on this screen. They will fill in the following information:

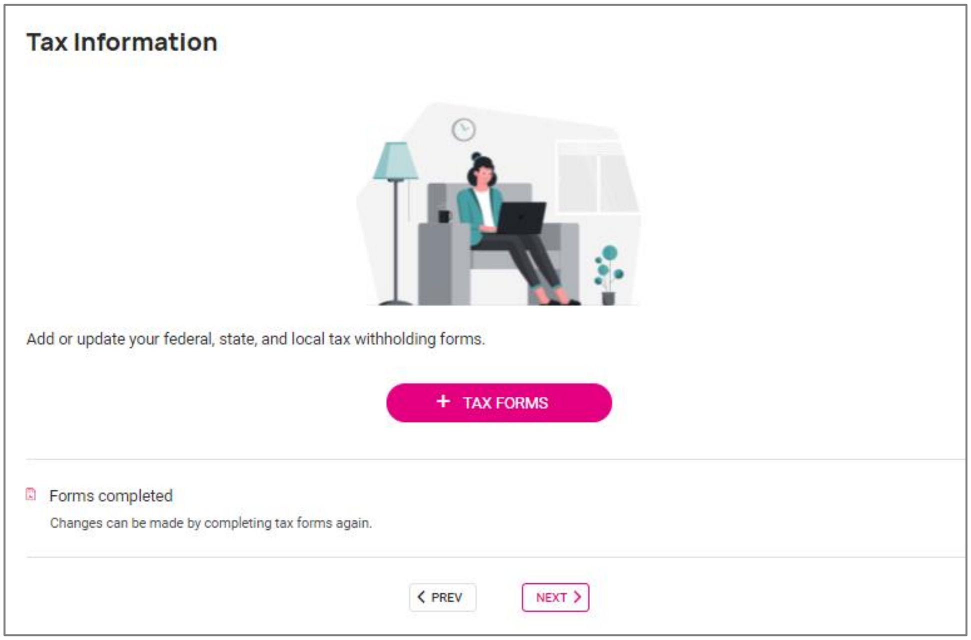
- Routing number
- Account number
- Account type
  - Checking
  - Savings
  - Pay card)
- Description (optional, might use this for bank name or account nickname for easier identification)

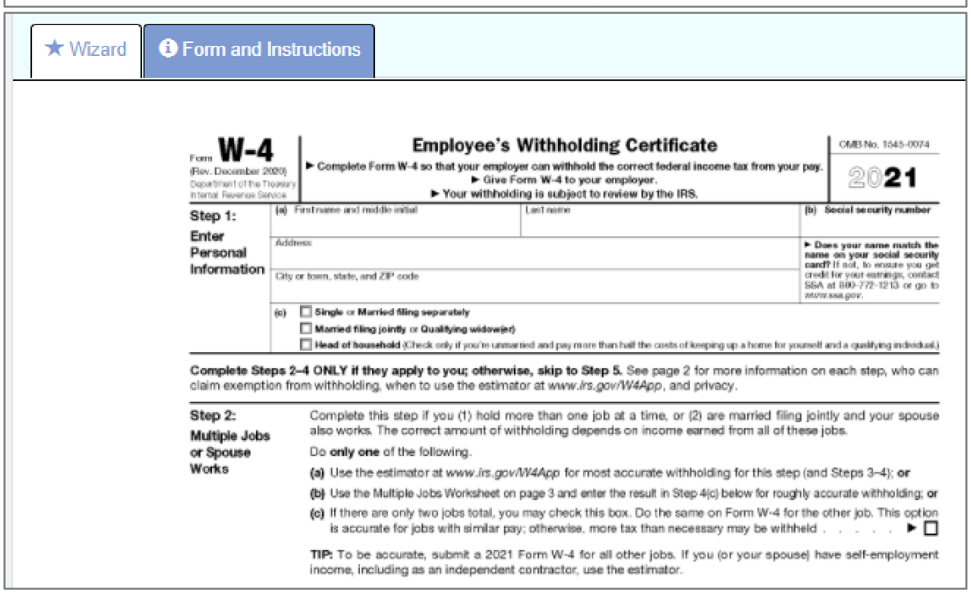
- Deposit details
    - Flat dollar amount
    - Percentage of net pay
    - Remaining net (this is recommended if they only have one direct deposit account)
- Frequency (multiple options including every pay or 1st pay of month)



Tax Information

When enabled, this section leads the employee through an online tax wizard that allows them to make their withholding selections for any applicable tax jurisdictions. These jurisdictions are based on both the residence address that the employee entered and the work location that is selected during the initiation of the onboarding process. The employee is presented with all applicable forms for the jurisdiction(s) and the system walks them through filling out the information which is required. When applicable, there are interactive worksheets available in the online version just as if the employee was filling out a paper version of the form. Completed copies are saved to the Employee Documents area in isolved when the employee is saved to the system upon completion of the new hire process.





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

Employee's Withholding Certificate

► 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.

OMB No. 1545-0074

2021

Step 1: Enter Personal Information

(a) First name and middle initial | Last name | (b) Social security number

Address

City or town, state, and ZIP code

► **Does your name match the name on your social security card?** If not, to ensure you get credit for your earnings, contact SSA at 800-772-1213 or go to www.ssa.gov.

(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.)

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.

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.

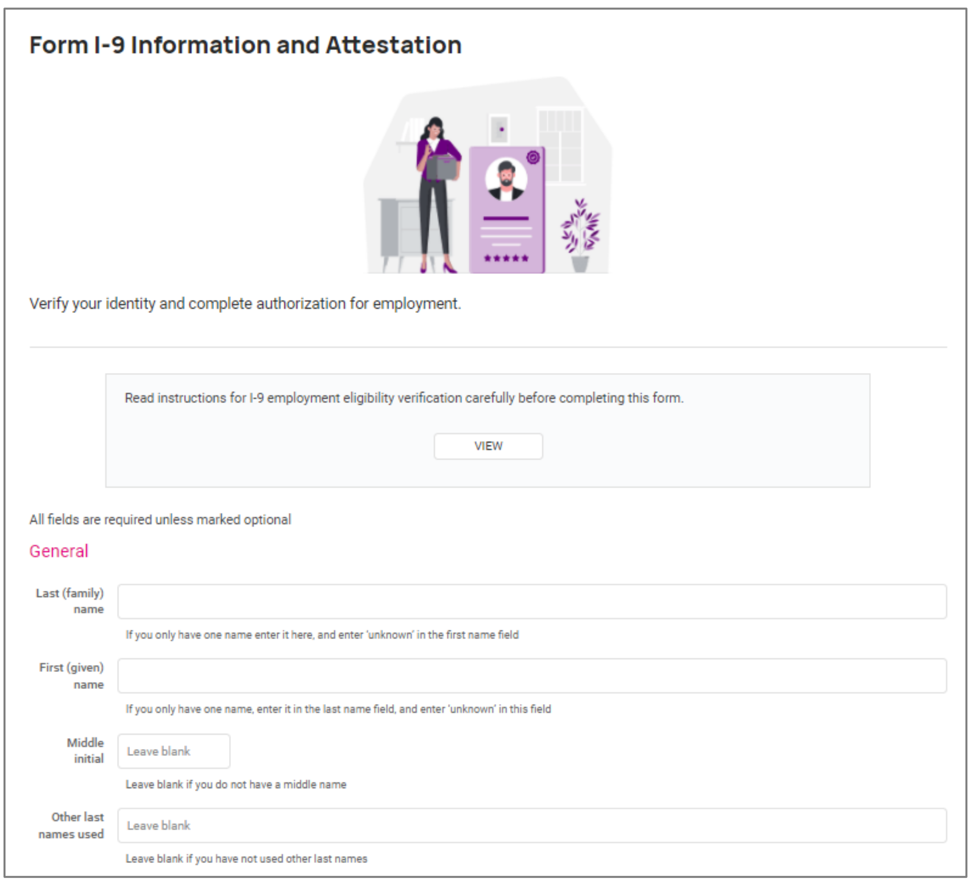
Federal Reporting

The Federal Reporting area includes 3 separate areas which are also optional in the Onboarding Template. This section includes an electronic version of Form I-9 as well as a screen for self-identification for EEO and WOTC Certification. Again, these are optional and will not appear if not selected as part of the template.

Form I-9

This section allows the employee to first view instructions linked directly to the US Citizenship and Immigration website if they are unfamiliar with what it is and why the employer needs to obtain the information from them. This screen has a message that states "All fields are required unless marked optional" and gives additional information in fields where it may not be completely clear which information is being requested.

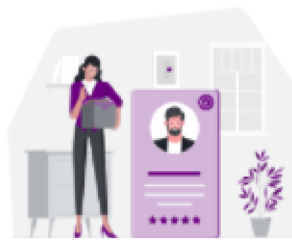
Unlike many other screens on the template, this area is required to be filled in by the employee if it is included in the template. The names they enter on this screen must match the names entered on the About You screen exactly in order to move forward with the electronic signature. This screen satisfies requirements just as though the employee is filling in a paper version of Form I-9.



EEO Self-Identification

When enabled, this screen collects information from the employee for voluntary self-identification for gender, ethnic origin, and veteran status for different employer reports. There is an informational area which explains why the employer is asking for this information.

EEO Self-Identification



Complete your voluntary status review.

Why are you being asked to complete this form?

To comply with governmental recordkeeping and reporting requirements for the administration of civil rights laws regulations, your employer invites employees to voluntarily identify their race, ethnicity, and gender on this EEO Se Identification Form.

The data you provide on this form will be used for governmental reporting requirements. Your employer will keep 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 fed 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 collec and reported in the categories identified below. The definitions for Race/Ethnic identification have been establish by the Equal Employment Opportunity Commission (EEOC). If you choose to voluntarily self-identify, you may mar only one of the boxes in each section presented below.

Gender identification

- Female
- Male
- Non-binary
- I do not wish to disclose

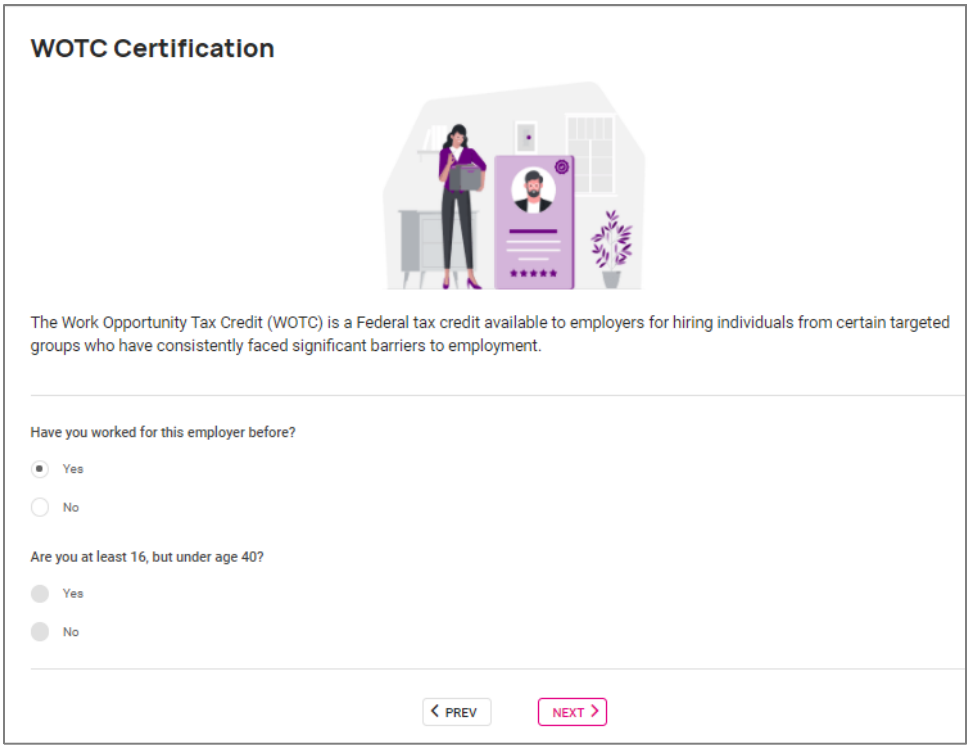
Race/ethnicity identification

- 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

RESET SAVE

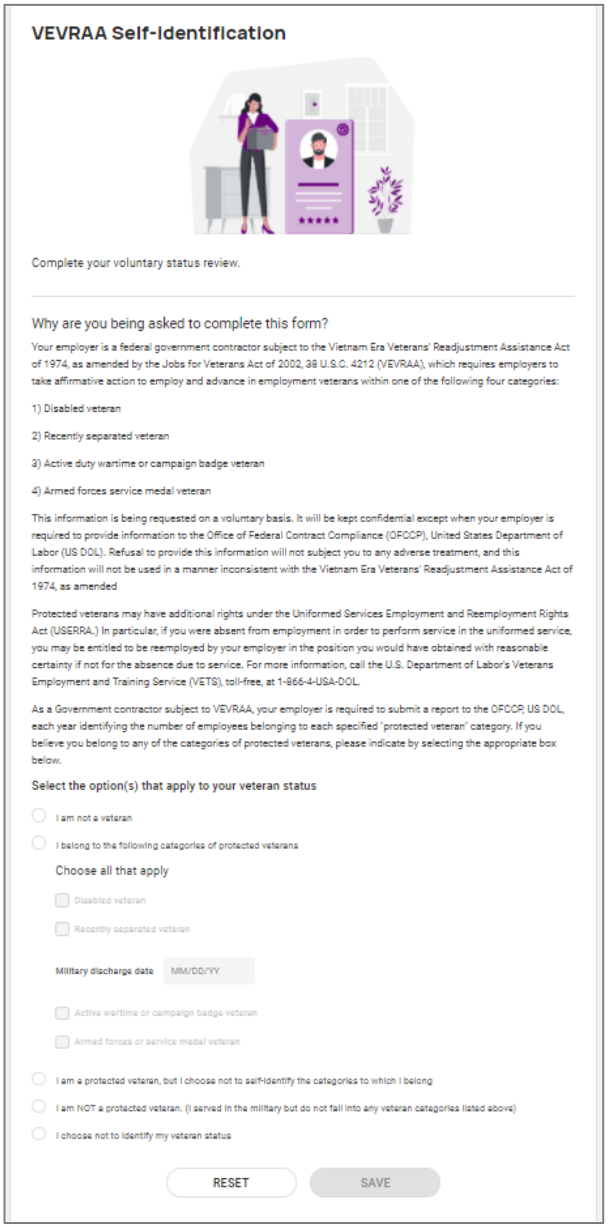
WOTC Certification

Many employers collect information during onboarding to see if their new hire qualifies them for any of the Work Opportunity Tax Credits. This section leads the new hire through a short wizard with basic questions that help determine qualification based on certain answers.



VEVRRA Self-Identification

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



VEVRAA Self-Identification

Complete your voluntary status review.

Why are you being asked to complete this form?

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.

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/YY

  - Active wartime or campaign badge veteran
  - Armed forces or 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

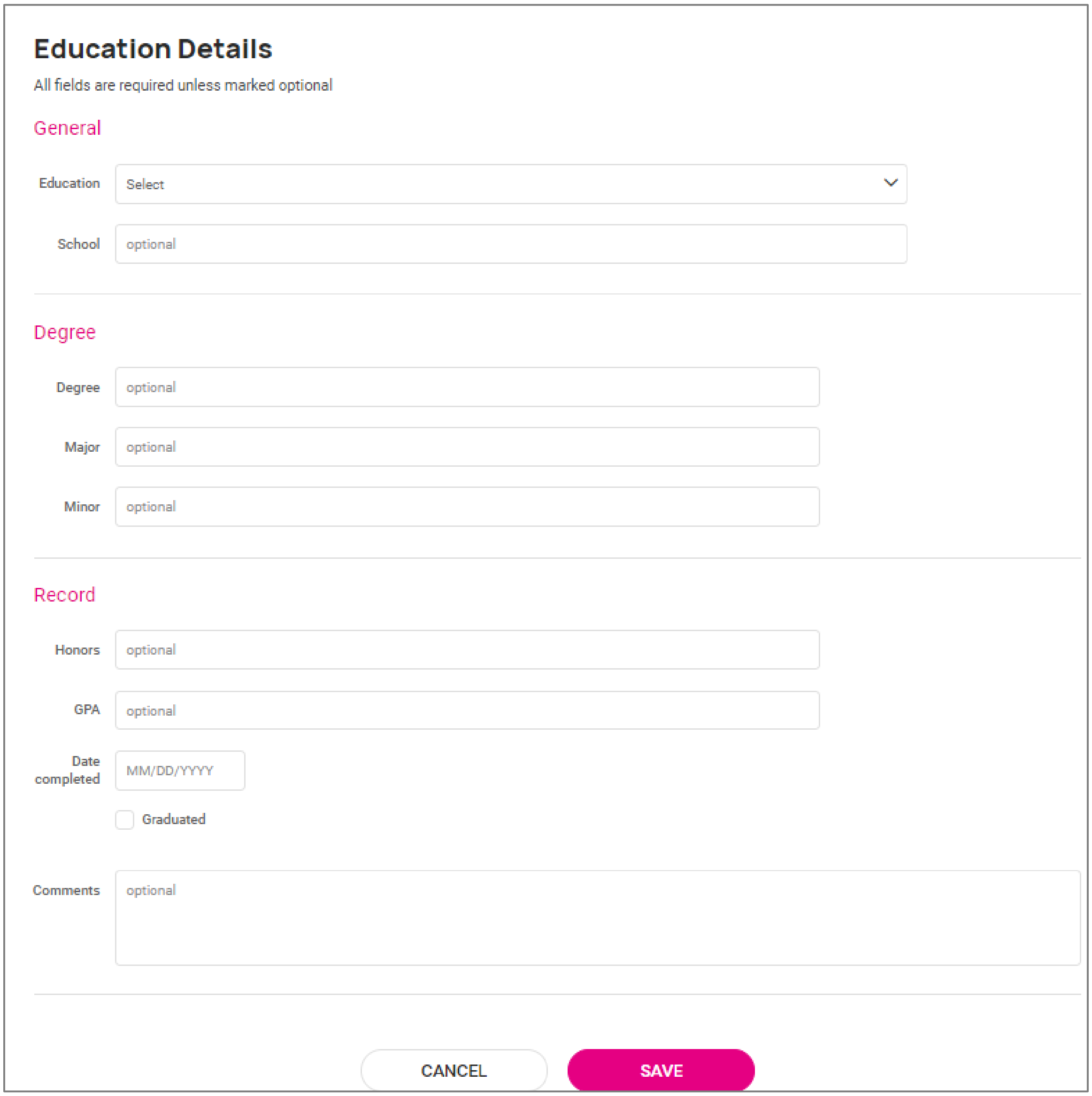
RESET SAVE

Education and Employment

This area can help to gather information from the employee including level of education and prior employment data.

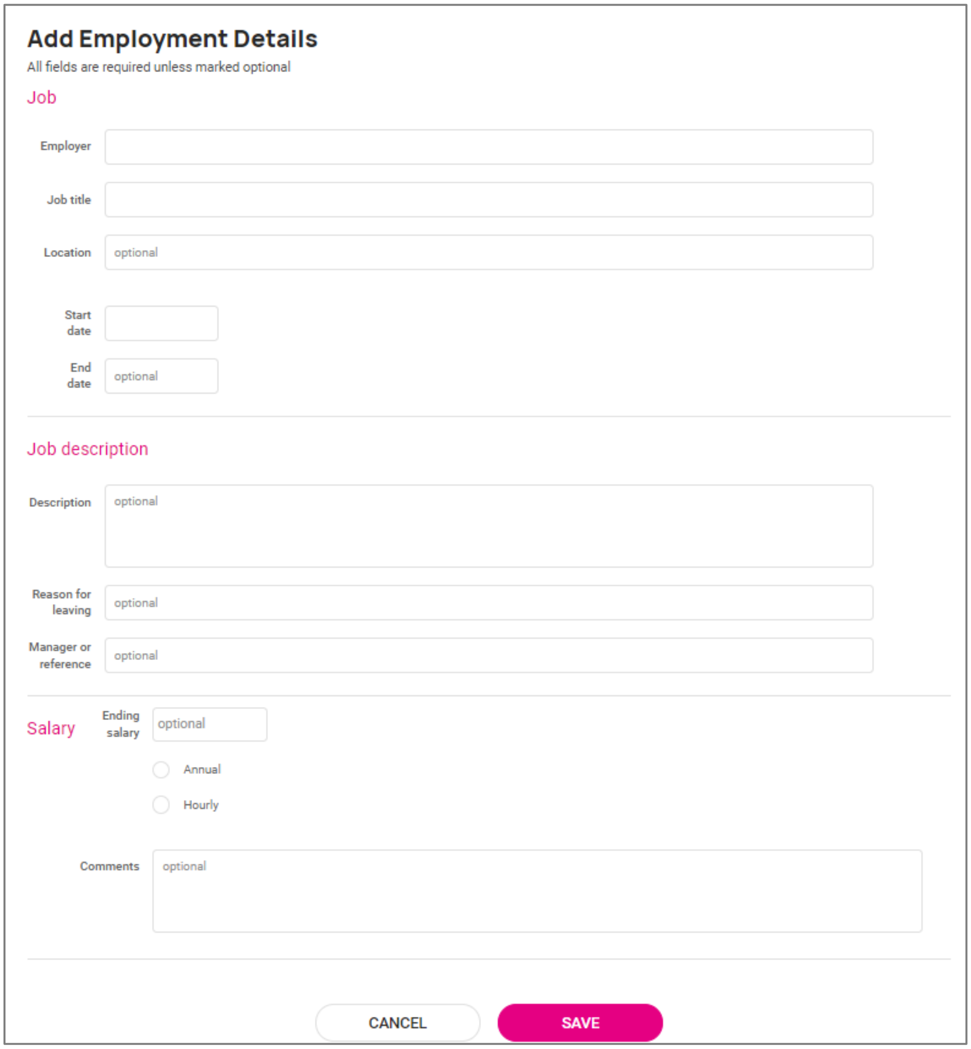
Education

In this area the employee is asked to enter details about education. In order for this page to work properly for the employee, the "Education" table must be built out on the client level under Client Management > Human Resources > Education. For more information on this, please see the article Education in isolved University. The employee selects from a list that was set up in the table to indicate the type of education obtained. There are several other details which can be collected on this screen. By default, only the level of education is required but other fields can be marked as required if needed. Each template can have different requirements, so if it is important to collect the GPA or Completion Date for one set of new hires but not as important for another, that can be set on each template.



Employment

This screen collects prior employment data from the new employee and can be a great tool for succession planning. There is no client-level table set up for prior employment so the employee will manually enter the name of the prior employer(s) and other details. Required fields on this screen include the **Employer Name**, **Job Title** and **Start Date**. All other fields can be required or hidden per-template. When the employee record is saved, this information can be found on the **Prior Employment** screen in isolved under Employee Management > Human Resources.

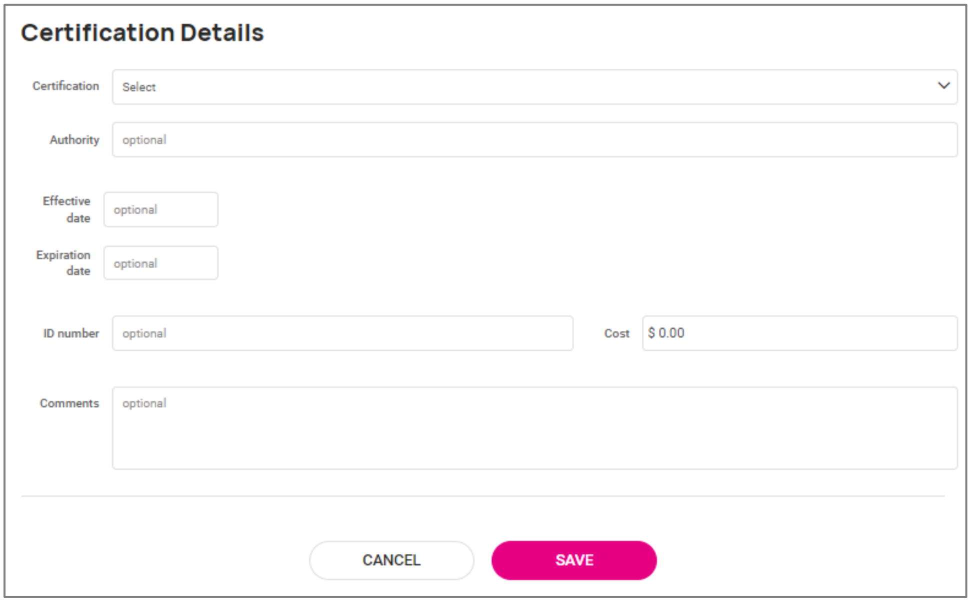


Certifications and Skills

The **Certifications and Skills** area includes other template options to collect certification information and skills information. Both of these screens pull from information set on the client level in order to add more details to the employee record.

Certification Details

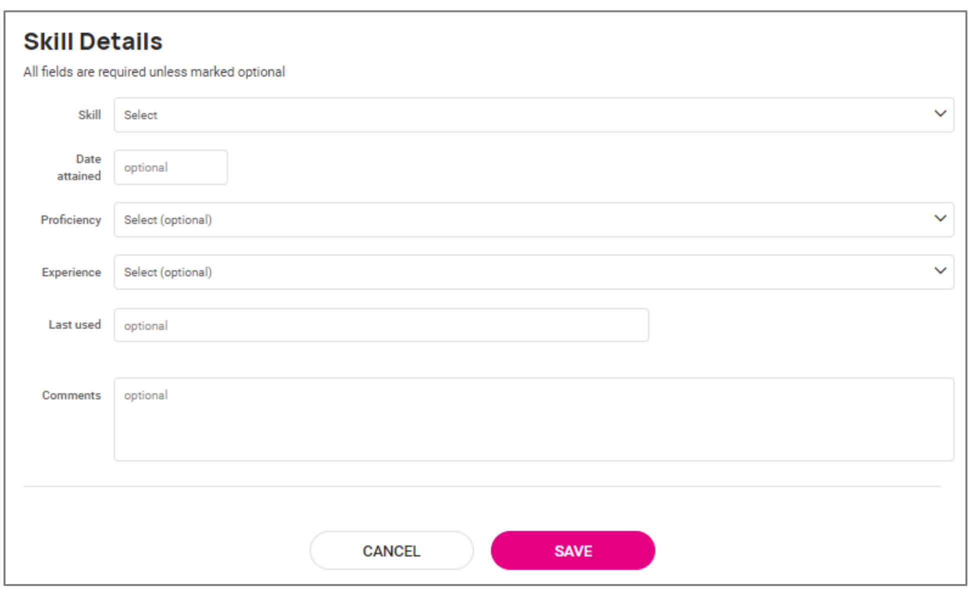
This area presents a picklist of certifications that are set up on the client level at Client Management › Human Resources › Certifications. This table contains certifications that are important to each client for tracking to keep their business running. Examples of certifications are food handling certifications, certified driver licenses, and CPR. For more information, please see the article Certifications in isolved University. The only field on this screen which is required by default is the Certification; other items can be required per-template. You're able to attach a message to this screen to give an employee more details about what you're looking for them to enter.



Skills

When enabled, this screen allows the employee to enter skills that are in a list. The list must be set up on the client level at Client Management › Human Resources › Skills. Common skills might include certain software programs, negotiation, or customer service. For more information on Skills, please see the University article Skills.

By default, only the Skill is required for this field. Additional details can be captured and required per-template. This screen can also have messages attached which might give the employee a better idea of what is expected on this page.

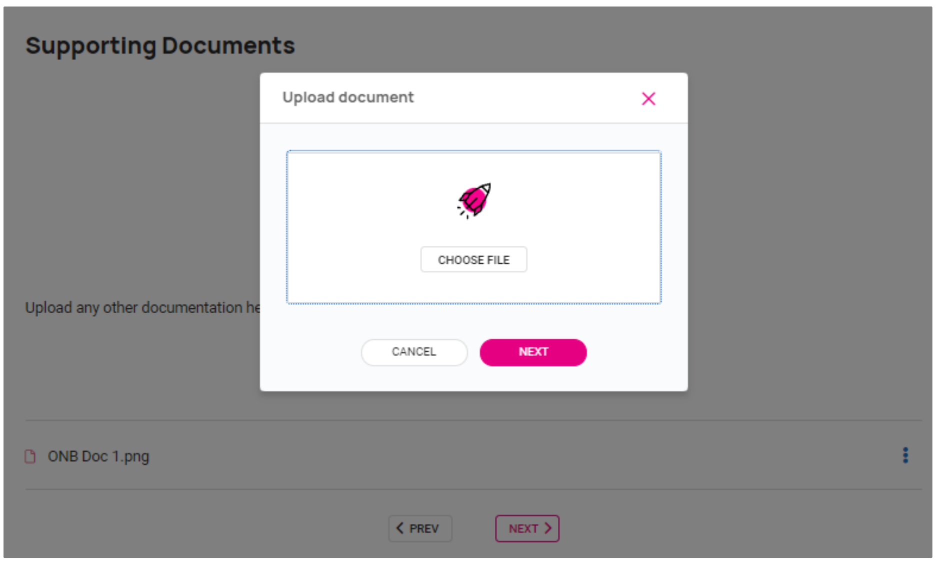


Additional Information

Additional information can be requested of the new hire in this area. While not required to be included, this can be a great place to collect supporting documents for certification and other items you'd need from the employee. Another field that might be included here is Miscellaneous Fields if they are being used to collect any new hire data.

Supporting Documents

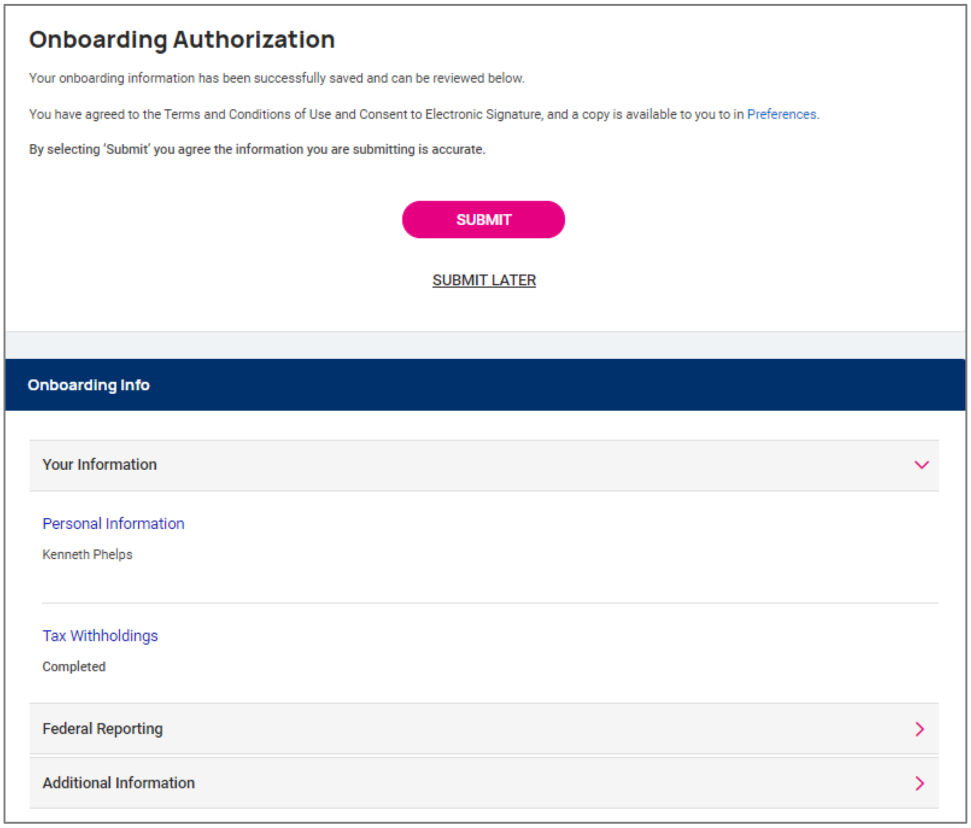
The Supporting Documents screen can have a message instructing the employee as to what types of documentation are required or expected to be submitted. If they were instructed to enter education information, for example, this can have a message to upload their diploma. If you're tracking CPR certifications, this might be where you have them upload the supporting documentation on the provider who certified them, date, and anything else you need for compliance purposes. The new hire is walked through each step of uploading their document(s).



Onboarding Authorization

The final section of onboarding shows the new hire a summary of the information that they have entered in the system. This page does not display if they have missed any required fields. It lets them know what they still need to complete before saving.

When this page displays, all required screens and fields have data and the record is ready to submit. The employee can select the arrows on the right side to open up each section for review, then they can select the Submit button when ready.


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
Onboarding Info
Your Information
Personal Information
Kenneth Phelps
Tax Withholdings
Completed
Federal Reporting
Additional Information