Onboarding

Settings

- 🔗 Double-check Day Labels for Time Off
- 🔗 Add Employment Benefits
  - These would be default/minimum amounts for individuals, couples, or families, and/or you can add these individually in <u>Settings > Batch Tools > Benefits</u>
- 🔗 Do you have any Employment Perks?
  - These would be default amounts that apply company-wide
- 🔗 Do you have any changes to naming conventions for roles?

System Tags

- 🔗 Add any Divisions, Departments, Event Types (ie Meeting, Social, etc)
- 🔗 Do you want to share employee birthdays? Anniversaries?
- 🔗 You can edit the welcome message employees receive when they first log in
- 🔗 You can edit the Onboarding list to remember what needs to happen when new employees start

Batch Tools

- 🔗 Employee Quick Add/Archive
  - Best for adding multiple employees quickly.
- 🔗 Employment
  - Position, Reports to, Employee #, Employee Start/End Date, Division, Department, Location, Employment Type, Hours/Day
- 🔗 Salary
- 🔗 Bonus
- 🔗 Benefits
  - These packages pull from Settings
- 🔗 Time-off Setup
  - This is most helpful when you start using the software or annually if there is a change to multiple employees' allowed time off/accrual rates.
- 🔗 Vacation Approvals
  - Any outstanding time off requests will be visible here so you can approve them all at once.

People

- 🔗 Employees will be asked to complete their General information when they first log in
- 🔗 You can edit their Employment information individually within their profile or within <u>Settings > Batch Tools > Employment</u>
- 🔗 To send an email message, select all or certain groups/individuals, then Notify > System Notification
- 🔗 To send a text message, select all or certain groups/individuals, then Notify > Text Message
- 🔗 To send account access, select all or certain groups/individuals, then Notify > Account Access

Assets & Allowances

- 🔗 Add assets and allowances under People > Assets & Allowances (left menu)
- 🔗 Once you have created the Asset or Allowance, you can provision it to individual employees
- 🔗 View your Org Chart
  - This will build out automatically as you fill in whom every employee reports to (Settings > Batch Tools > Employment)
- 🔗 Add Job Profiles under People > Job Profiles (left menu)

Performance

- 🔗 Build a performance <u>review</u>, <u>check-in</u>, or <u>goal-setting</u> template
- 🔗 Clone a performance <u>review</u>, <u>check-in</u>, or <u>goal-setting</u> template
- 🔗 Assign performance reviews to employees

Documents

- 🔗 Do you have any documents to add?
- 🔗 Do any of your documents require a signature?
- 🔗 Which documents do you want to be featured for employees as they log in / new employees?
- 🔗 Add Searchable tags to any documents
- 🔗 Assign documents to specific employees
- 🔗 Check-in to see who has signed each document

Events

- 🔗 Add an event
- 🔗 Subscribe to Events calendar
- 🔗 Subscribe to Time-off calendar