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Onboarding In Worklio

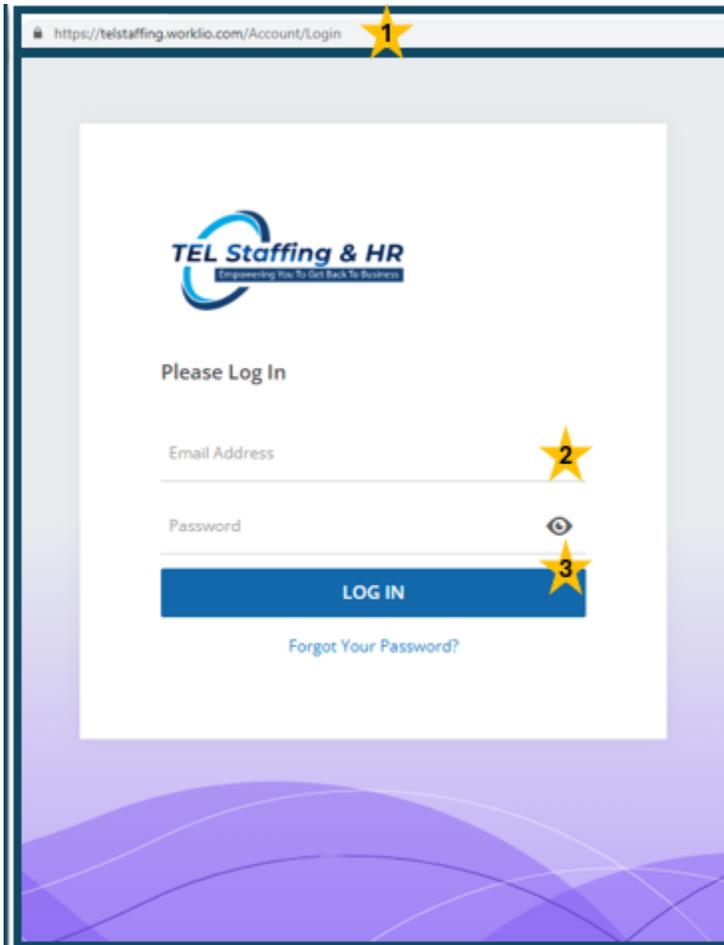
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ACCESSING WORKLIO

Accessing Worklio

1. Go to <https://telstaffing.worklio.com/Account/Login>
2. Enter Managerial Credentials
3. Click Login

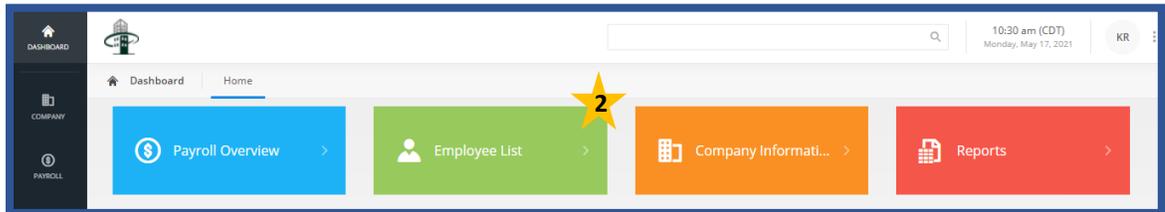


The screenshot shows a web browser window with the URL <https://telstaffing.worklio.com/Account/Login> in the address bar. The page features the TEL Staffing & HR logo at the top, followed by the text "Please Log In". Below this, there are two input fields: "Email Address" and "Password". The "Email Address" field has a yellow star with the number "2" next to it. The "Password" field has a yellow star with the number "3" next to it. Below the input fields is a blue "LOG IN" button, also marked with a yellow star and the number "3". Below the button is a link that says "Forgot Your Password?".

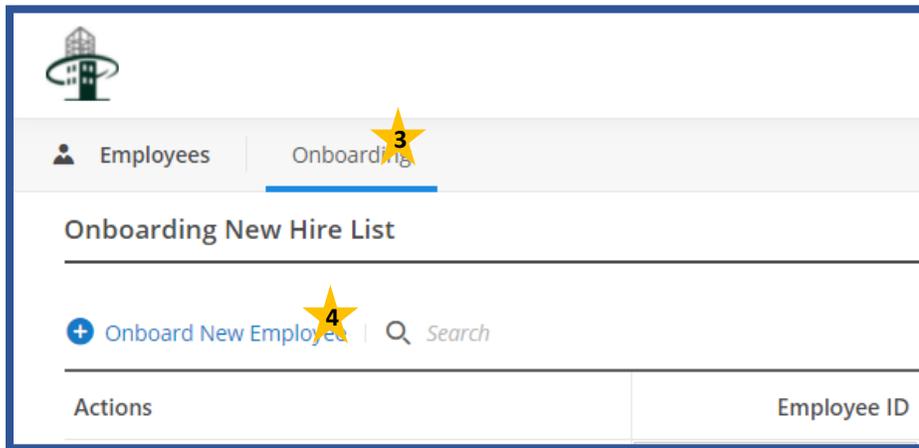
STARTING ONBOARDING

Starting Onboarding

1. **Login to Worklio**
 - a. See Access Worklio
2. **Click Employee List** From the dashboard



3. **Click Onboarding** tab
4. **Click Onboard New Employee**



5. **Select Onboarding Template** from drop-down menu
6. **Select Eligible Team Members**
 - a. This allows selected Team Members to see & interact with the onboarding profile for this employee
 - b. **Check “Onboarding Visible for all Custom Client Users”** if all Team Members are to view this employee’s profile
7. **Click Continue**

STARTING ONBOARDING

Onboard New Employee

Select Onboarding Template 5

Onboarding visible for all Custom Client Users

Search Clear Filters

Login	Name
<input type="checkbox"/>	<input type="text"/>
<input checked="" type="checkbox"/>	Katy.Rodgers@telstaffing.com
	Rodgers, Katy

20 50 100 Page 1 of 1 (1 items) 1

Robust Painting / Client #1003

CONTINUE 7 CANCEL

8. Enter Employee's information

- First Name
- Last Name
- Valid Email Address

9. Click Next

Hire And Onboard A New Employee / Employee Basic Information (1/4)

1 2 3 4

MANDATORY INFORMATION

First Name 8

Last Name

Employee Identification SSN

SSN

Login Email Address

ABC Construction LLC / Client #1012

NEXT 9 SAVE & NOTIFY CLOSE

10. Enter Hire Date

11. Click Next

STARTING ONBOARDING

Hire And Onboard A New Employee / Employment Basic Information (2/4) Actions

1 2 3 4

GENERAL EMPLOYMENT INFORMATION

Employee ID

Clock Number

Original Hire Date **10**

Distribution Code

GENERAL EMPLOYMENT INFORMATION

Union Member

Union

IMPORTANT DATES

Benefits Waiting Period Start Same as Original Hire Date

ABC Construction LLC / Client #1012

BACK **NEXT** **11** SAVE & NOTIFY CLOSE

12. Enter Employment Detail Information

- a. Status – This will always be “Active”
- b. Position Details
 1. Position
 2. Home Division (if applicable) – What Division the Employee will be in
 3. Work Location (if applicable) – What Location the Employee will be in
 4. Workers Compensation Code
 5. Benefit Group (if applicable)
- c. Compensation
 1. Employment Type
 2. Compensation Type
 3. Payroll Rule – What Payroll Schedule the Employee will follow
 4. Worker Type
 5. Compensable Hours – Estimate number of hours per pay period
 6. Pay Rate

13. Click Next

STARTING ONBOARDING

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

Effective Date: 5/18/2021

Status: [Field]

Pull Into Payroll:

POSITION DETAILS

Position: [Field]

SOC Code: [Field]

Home Division (Default): [Field]

Work Location (Default): [Field]

Department: [Field]

Work Camp Code (Default): [Field]

Certified Code (Default): [Field]

Benefit Group: [Field]

EEO Class: [Field]

Time Off Group: [Field]

COMPENSATION

Employment Type: [Field]

Compensation Type: [Field]

Payroll Rule: [Field]

Pay Period: [Field]

Worker Type: Non-Exempt

Compensable Hours: [Field]

Estimated Annual Wage: [Field]

ADDITIONAL DETAILS

S Corp Owner:

Business Owner:

Percentage Of Ownership: [Field] %

Eligible For Section 125:

Statutory Employee:

943 Agricultural Employee:

Corporate Officer:

Exempt From Worker's Comp:

ABC Construction LLC / Client #1012

BACK NEXT SAVE & NOTIFY CLOSE

14. Enter Job Costing Information (if applicable)

- State – State Employee will be in
- Project – Project Employee will be in
- Position – Position Employee will occupy

15. Click Finish

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

Job Costing Code: [Field]

State: [Field]

Project: [Field]

Position: [Field]

ABC Construction LLC / Client #1012

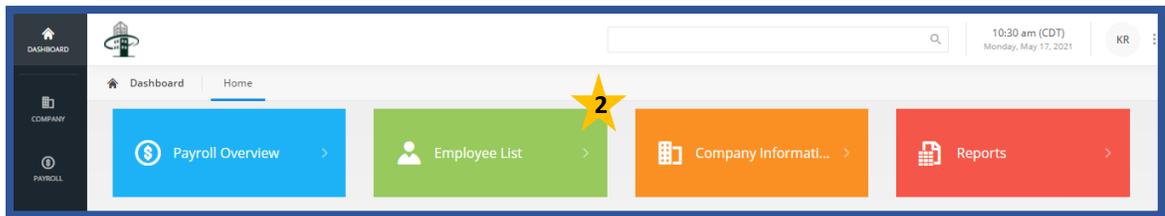
BACK FINISH CLOSE

VERIFYING FORMS

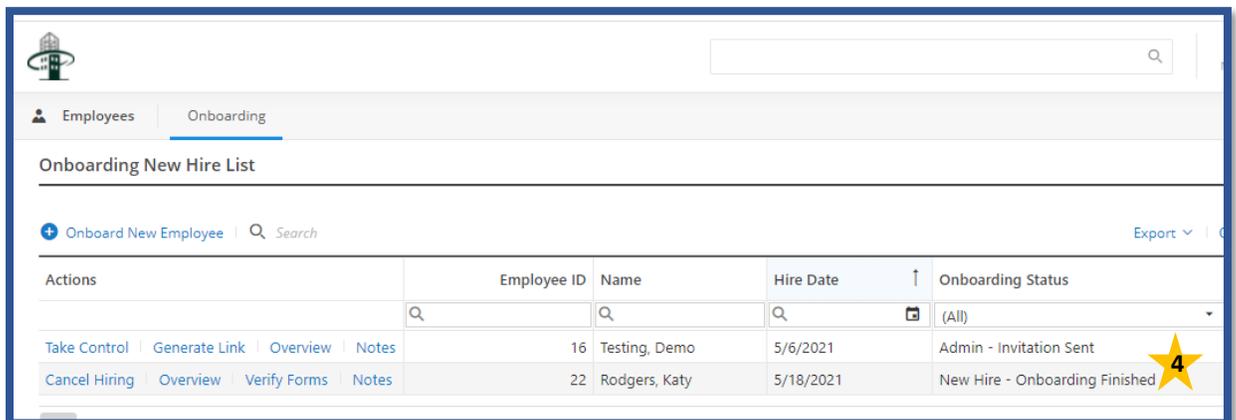
Verifying Forms

Once an Employee has finalized their portion of onboarding, you will need to verify information & pass the onboarding on to TEL Staffing & HR. These Employees will have an Onboarding Status of “New Hire – Onboarding Finished”.

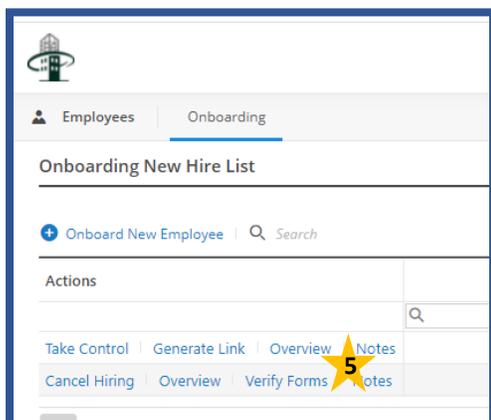
1. **Login to Worklio**
 - a. See Access Worklio
2. **Click Employee List** From the dashboard



3. **Click Onboarding** tab
4. **Locate Employee**



5. **Click Verify Forms**



VERIFYING FORMS

Net Pay Allocations

1. Click Complete Net Pay Allocations

Forms Verification Actions

? The I-9 form requires your verification. Please continue to the "Complete I-9" step.

List Of Forms To Be Completed

- ✓ Complete Net Pay Allocation **1**
- Tax Setup
- Complete I-9
- Document Review/Signing

2. Verify the Employee entered **Direct Deposit information**

- If Employee has not added Direct Deposit, please alert your Onboarding Specialist during the Finalization step.

3. Click Finish

Data Verification / Net Pay Allocation (1/1)

+ Add New Allocation 🔍 Search Select Columns

Actions	Type	Account Number	Routing Number	Account Holder Name	Account Type	Amount	Percent	Require Pre-Note	Days To Wait After Pre-Note
No data									

20 50 100 Page 1 of 1 (0 items) 1

ABC Construction LLC / Client #1012 FINISH **3** CANCEL

VERIFYING FORMS

Tax Set Up

1. Click Tax Setup

Forms Verification Actions

The I-9 form requires your verification. Please continue to the "Complete I-9" step.

List Of Forms To Be Completed

- ✓ Complete New Pay Allocation
- Tax Setup **1**
- Complete I-9
- Document Review/Signing

2. Verify Employees Effective Date

- This is their Start Date

3. Click Next

Tax Setup / Effective Date (1/3)

EFFECTIVE DATE

Effective Date 5/18/2021 **2**

NEXT **3** CANCEL

4. Verify Employees Home Address

5. Verify Employees Work Location

6. Click Next

VERIFYING FORMS

Tax Setup / Residential And Work Addresses (2/3)

1 ————— 2 ————— 3

Effective Date 05/18/2021

RESIDENTIAL ADDRESS 98 Weed St Pensacola, FL 32514 **4** EDIT PRIMARY WORK LOCATION (SUTA AND MULTIPLE WORKSITE) 98 Weed St Pensacola, FL 32514 **5** EDIT

ADDITIONAL INFORMATION Tax Setup Note EDIT

OTHER WORK LOCATION

+ Add Work Location | Search Clear Filters | Select Columns

Actions	Name	Address Line 1	City	State	ZIP Code
No data					

20 50 100 Page 1 of 1 (0 items) 1

BACK **6** NEXT CANCEL

7. Verify Employee's Tax set up

8. Click Finish

Tax Setup / Exemptions (3/3)

1 ————— 2 ————— 3

FEDERAL TAX

Open the corresponding Tax Withholding Form that was provided by employee. **7**

Filing Status | Single or Married filing separately

Two Jobs |

Claim Dependents | \$

Other Income | \$

Deductions | \$

Extra Withholding | \$

Exempt From ER Social Security |

Exempt From Federal Income Tax |

Exempt From EE Social Security |

Exempt From Federal Unemployment Tax |

Exempt From Medicare |

STATE TAXES - FL (RESIDENTIAL LOCATION)

Nonresident Certificate |

Exempt From Florida State Unemployment Tax |

BACK **8** FINISH CANCEL

VERIFYING FORMS

I9 Verification

1. Click Complete I9

2. Enter Employee's First Day of Employment

3. Select Verification Document Type

- This is which List of Acceptable Documents the Employee's verification Documents fall under.

4. Enter Document Information in appropriate fields

5. Check Attestation Box

6. Click Next

7. Enter your organizations information

- Company Name
- Company Address

VERIFYING FORMS

8. Enter your personal information
 - a. Name
 - b. Title
9. Enter your Digital Signature
10. Click Next

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

EMPLOYER'S BUSINESS OR ORGANIZATION INFORMATION

Preset: Client

Name: ABC Construction LLC

Address: 308 W Government Street

City: Pensacola

State: Florida

ZIP: 32502

EMPLOYER OR AUTHORIZED REPRESENTATIVE INFORMATION

Title: Project Coordinator

First Name: Katy

Last Name: Rodgers

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.



BACK NEXT CANCEL

11. Review I9 Document for accuracy
12. Click Finish

Form I-9 / Review (3/3)

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) Rodgers	First Name (Given Name) Katy	Middle Initial N/A	Other Last Names Used (if any) N/A	
Address (Street Number and Name) 98 Weed St	Apt. Number N/A	City or Town Pensacola	State FL	ZIP Code 32514
Date of Birth (mm/dd/yyyy) 10/01/1999	U.S. Social Security Number 123 - 45 - 6728	Employee's E-mail Address Katy.Rodgers@telstaffing.com	Employee's Telephone Number 8505169457	

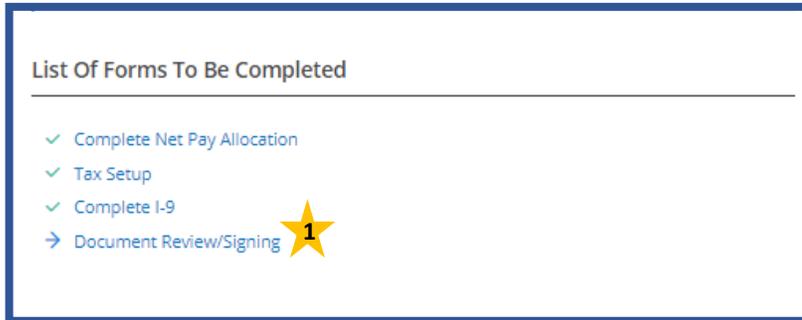
I am aware that federal law provides for imprisonment and/or fines for false statements or use of false documents in connection with the completion of this form.

BACK FINISH CANCEL

VERIFYING FORMS

Document Review

1. Click Document Review/Signing



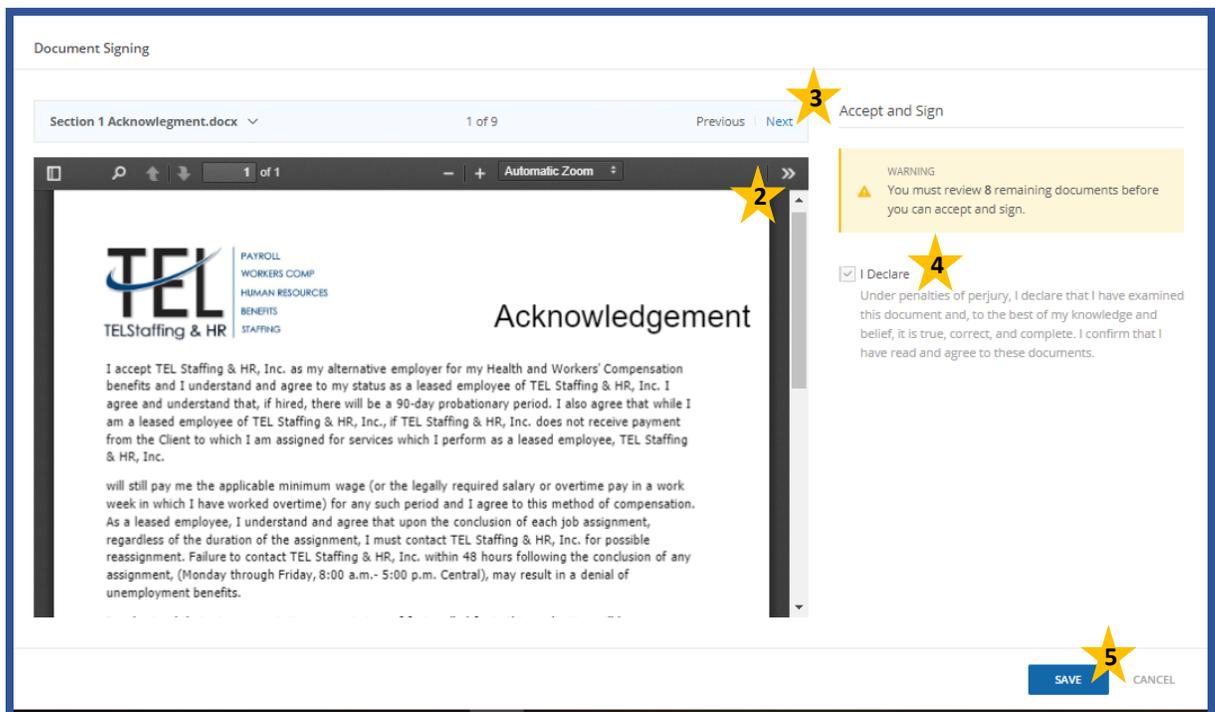
2. Review Employee Document for completion

3. Click Next to review documents

- Each document the Employee signed must be reviewed before moving forward

4. Check the Declaration Box

5. Click Save



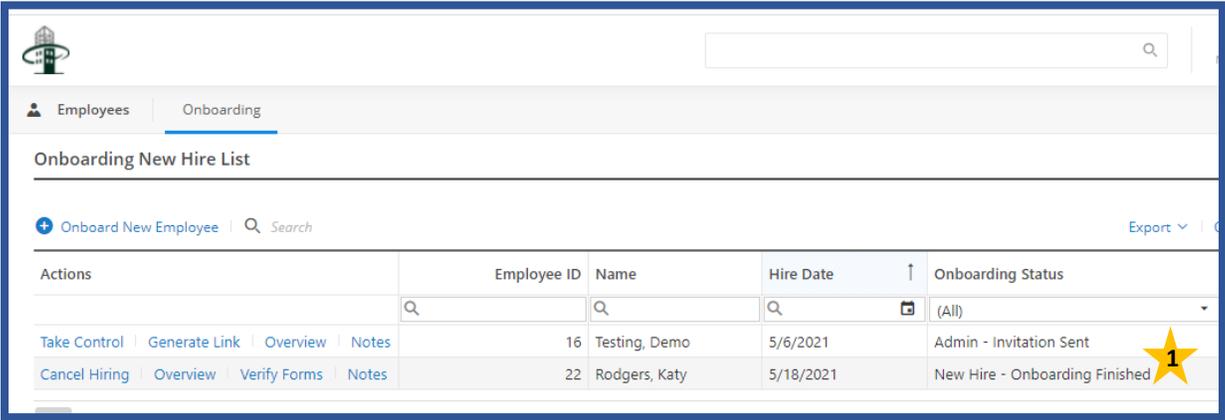
FINALIZING ONBOARDING

Finalizing Employees Onboarding

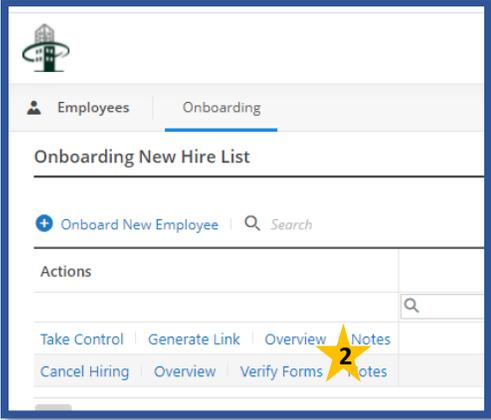
Once an Employee's Onboarding Forms have been verified, you will need to pass the onboarding to TEL Staffing & HR. Onboarding cannot be complete until this step has been completed. This step is to be completed in the Forms Verification menu.

Pass to PEO

1. Locate Employee



2. Click Verify Forms



3. Click Action drop-down menu
4. Click Pass to Client/Admin User

FINALIZING ONBOARDING

Forms Verification

Actions

3

4

Pass to Client/Admin User

Notes

✓ Successfully Created

Some steps can be finished only by a PEO user. Please go to the Action menu in the upper right and click "Pass to Client/Admin User" to pass control to the PEO representative.

List Of Forms To Be Completed

- ✓ Complete Net Pay Allocation
- ✓ Tax Setup
- ✓ Complete I-9
- ✓ Document Review/Signing

5. **Click PEO User Level**
6. **Select Onboarding Specialist** from the drop-down user list
7. **Add Message** if applicable
 - a. Any information you feel may be important for the Onboarding Specialist to know regarding this onboarding.
8. **Click Save**

Save & Notify

User Level PEO Client

User

Message

5

6

7

8

SAVE CANCEL