EHX New Employee – Registration & Request Processing

New Employee Interview Completion & eSignature Instructions

Contents

Overview

EHX is a web-based software platform that eliminates the paperwork and guesswork from the new hire onboarding process. Onboarding is, unquestionably, the most critical piece of new employee enrollment.

EHX Employee Portal allows employees to self-register and complete the Onboarding interview from any location. Managers or Admins also have the ability to add a new employee and initiate the onboarding process allowing the employee to finish the process by clicking on an email link.

This document provides the necessary steps for each.

Onboarding Quick Reference

This document is a quick reference guide for Managers and Admins to understand the user experience and where it falls in within the approval process.

Employee Self-Registration Option:

1. Employee self-registers
2. Finishes Interview
3. Reviews and eSigns all documents
4. Logs out to allow Manager/Admin to complete approval process

Manager/Admin Initiated Option:

1. Manager adds a new employee
2. Email is generated to employee to complete registration
3. Finishes interview
4. Reviews and eSigns all documents
5. Logs out to allow Manager/Admin to complete approval process

Employee Request Processing

Before an employee can log into the system to complete and sign a request (Application, Onboarding, Driver, WOTC, etc.), the employee needs to have been registered in EHX.

Registration can occur in one of two ways:

1. Employee self-registration
    a. Following registration employee will log in and complete Application or Onboarding request (dependent upon company setup).

> **TIP** Companys utilizing the EHX Application offering will have the employee self-register and complete the application first.

2. Manager/Admin registration
    a. The Manager or Admin will add the new employee to a location and create a User ID
    b. An email is generated and sent to the employee with a link that will allow them to include a password and PIN to their registration details.
    c. When registration details are completed and submitted, the employee will be logged in and requests initiated by the Manager/Admin will be available for the employee to process (finish interview(s) and eSign).
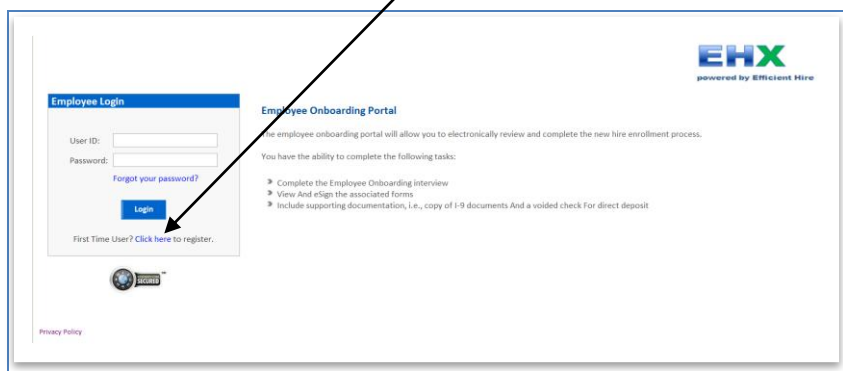
New Employee (Employee Self-Registration)

The employee is provided a link to click on or to insert into a browser. This link directs the applicant or new hire to the EHX Employee Portal.

Example Link: http://securesite/EHX/tacohaven/employeelogin.asp

Employee clicks <u>First Time User? Click here to register</u> link to create account and login credentials

Employee will complete **New Employee registration details**, Create a **User ID, password, and PIN** Click **Continue to Finish**

TIP applicants must select the location to which they are applying. The applicant can be reassigned to a different location prior to onboarding.

TIP Encourage applicants to create User IDs and passwords that are unique but easy for them to remember.

Upon a successful registration, the applicant will be returned to the Employee Portal and will log in to complete and sign the request(s). Refer to *Employee Completes Interview* and *Employee Reviews and eSigns a Request* below.

New Employee (Manager/Admin Created)

All requested information is required.

Note: **Skip this step if** employee is already a registered employee

- Click **Employee View**; then click **New Employee** to register employee & initiate onboarding (see example below)
- If necessary, use Location **drop-down to select employee location**
- **Enter all other info** (name, email address, and create a User ID the employee can remember)
- Select **Employee Onboarding** Request type from drop-down menu
- **Click Continue** to complete employee registration

TIP employees will need to access the email account entered here in order to complete the process. **Ensure email address is valid and accessible from where they will complete their onboarding.**

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- A **New Hire registration email is sent** to the employee's email address. The email contains a unique link which the employee will use to complete their registration.

Note: This unique link identifies the user to the EHX system and connects them to the correct account and request(s).
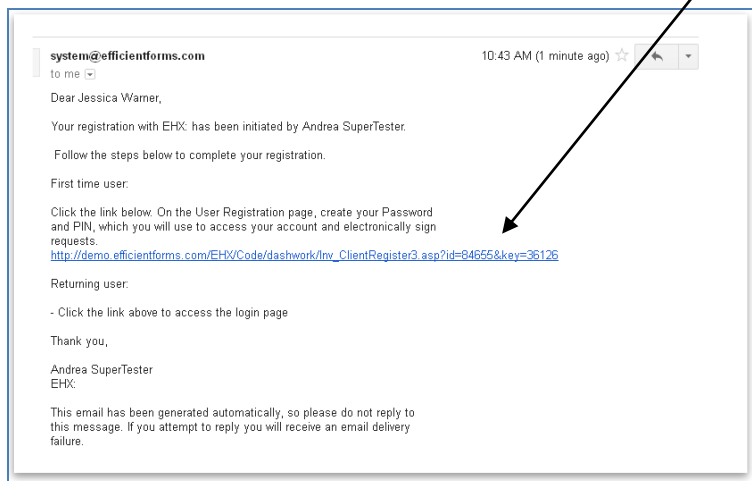
Once email has been sent to employee, the request's <u>status will be incomplete</u> until the employee finishes the interview.

Employee Completes Registration

Employee completes the registration details and follows onscreen options to finish request requirements (complete interview, eSign, etc.).

The employee will receive an email directing them to **<u>click the link</u>** and log in to complete their requests.

After the employee clicks on the link, they will be directed to create a password and a PIN. The User ID combined with the password is used to log into their account. The PIN will be used to eSign following the completion of the request(s) interview(s).

Please read the following carefully:

Electronic Consent and Disclosure

This page contains information pertaining to the disclosure of consumer protections covering business transactions completed electronically on this web site.

1) Completion of your registration details (by entering your self-selected PIN) confirms your affirmation that you consent to electronically receive records and transact business on this site.

Registration Details

* indicates required field
Account Information

First Name: *   Jessica
Last Name: *   Warner
Email: *   jwarner@gmail.com

Login Information
Be sure to record your User ID and password in a safe place for future reference.

User ID: jwarner
Password: *   ●●●●●●●●●●   ⓘ Case sensitive
Verify Password: *   ●●●●●●●●●●   ⓘ Password requirements:

➤ 6 to 12 characters
➤ Minimum of 2 number(s)
➤ Minimum of 1 alphabetic character(s)

Personal Identification Information
Enter a PIN. This PIN confirms your consent to electronically receive records. You will enter this PIN when electronically signing documents.

PIN: *   ●●●●   ⓘ Must be 4 non-repeating numbers, and cannot begin with zero (0)
Verify PIN: *   ●●●●

[Submit] [Cancel]

For a complete description of your consent to use electronic records and your consumer protections, click here.

Privacy Policy

Tip When possible, encourage employees to create passwords and PINs they can easily remember but are cryptic enough to prevent fraud.

Employee Completes Interview

Following the employee completing and submitting their Registration Details, the employee will be automatically logged in to the Employee Portal with instructions on what to do next. The employee will follow the onscreen instructions to complete the interview(s) and eSign all requests.

Employee clicks **Finish Interview** to begin the Onboard request interview

Click **Continue Questions to advance** the employee interview to next page, or
Click **Continue Questions Later to save and finish later**

Employee Reviews & eSigns Requests

Employee performs actions listed under My Next Step column by clicking the icon/link provided there.

Click each eSign icon and follow onscreen instructions to enter PIN and Approve

> **Tip** An I-9 will be generated **after** the Onboarding request has been eSigned. Encourage new hires to review **My Next Step column** to look for additional requirements and log out only when **ALL** say no action required.

> **Tip** WOTC requests are only available for eSignature if employee is possibly eligible and WOTC is enabled.

Employee **enters 4 digit PIN** and clicks **Approve** to eSign request documents and approve.

Note: The employee has the option of reviewing the documents prior to eSigning and should click **Cancel if incorrect data is displayed or if a change of info is required** in order to re-enter interview and modify.

> **Tip** In most company workflows, the I-9 will be created after the Onboarding request has been eSigned by the employee. Make sure employee has eSigned ALL requests before logging out.

Employee clicks eSign icon on I-9 request.

My Next Step	Employee Request Descri...	Status Date	Status	Other Actions
No action required	Employee Onboarding	12/22/2013 2:31:19 PM	Pending Manager Approval	
eSign	I9	12/22/2013 2:31:19 PM	Interview Complete	

When a request has been eSigned, the My Next Step column will display "No Action Required" for that request and the request's status will transition to Pending Manager/Admin approval (dependent upon workflow configuration).

My Next Step	Employee Request Description	Status Date	Status	Other Actions
No action required	Employee Onboarding	12/22/2013 2:31:19 PM	Pending Manager Approval	
No action required	I9	12/22/2013 2:51:16 PM	Pending Manager Approval	

Once ALL requests reflect No action required under My Next Step, the employee can log out to allow the Manager and/or Admin to complete the onboarding process.

> ➤ Refer to <u>Onboarding for Admin-Manager</u> manual to complete review and approvals