

iSolved Product Release 8.6: Onboarding Updates

Presented By: Lauren Richmond



What has been Updated?

- ◆ **ENHANCED** Initiate Onboarding is part of the Pending Employees screen
- ◆ **NEW** Pending Employees screen gives the user the option between a focused or detailed view.
- ◆ **NEW** Bypass option to override the workflow process.
- ◆ **NEW** New Hires and Rehires will all now be under the Pending Employee screen instead of two different screens.
- ◆ **NEW** Quick Hire screen now includes Prefix, Suffix, Personal Email, Manager Search, Supervisor Search, Work Phone and usability updates for SSN and Date of Birth



Quick Hire screen now includes more fields to capture information

Quick Hire

- Before: the Quick Hire screen captured limited information for fast entry.

Quick Hire

- Now: Quick Hire will also capture Prefix, Suffix, Personal Email, Manager, and Supervisor.

General

ID Type: Search or Select from list ⓘ

SSN: ⓘ

* First Name:

Preferred Name:

Middle Name:

Last Name:

Prefix:

Suffix:

Self-Service Email:

Hit Enter Key in zip code field to retrieve city list.

* City:

* State:

Home Phone:

Mobile Phone:

Work Phone:

Personal Email:

Birth Date(MM/DD/YYYY): MM / DD / YYYY ⓘ

Gender:

Organization/Labor/Job

Division: Search or Select from list ▾

Department: Search or Select from list ▾

Job: Search or Select from list ▾

Workers Comp: Search or Select from list ▾

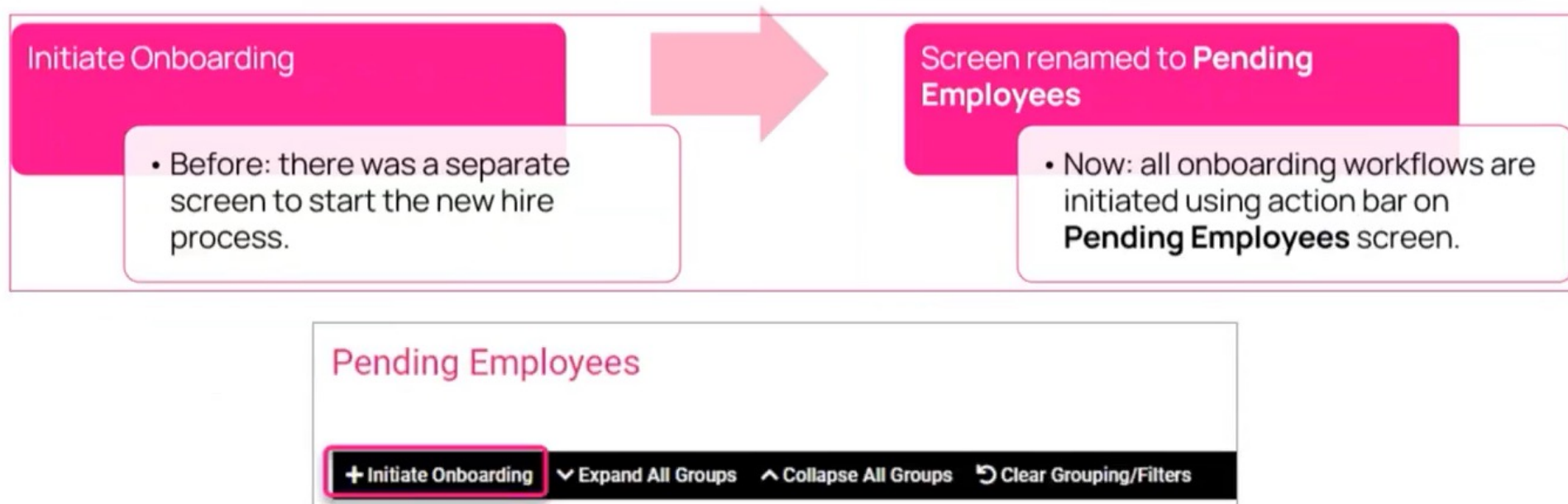
Soc Code Search:

Manager Search: Search or Select from list ▾

Supervisor Search: Search or Select from list ▾



Initiate Onboarding is part of the Pending Employees screen



Pending Employees screen gives the user the option between a focused or detailed view.

Pending EE Dashboard

- Before: there was a separate screen to see new hires and rehires with their status in the onboarding process

Data moved to Pending Employees

- Now: **Pending Employees** screen shows workflow status of all new hires with two options!

Focus View:

Actions	Employee	Legal	Onboarding Template	Current Step	Status
> ...	Jonathan Lattimer essuser121@gmail.com	University Training Management Comp SARASOTA, FL	New Hires 2022	Client HR Onboarding Wizard Assigned To: Client User - HR	Waiting on Colleague
> ...	Sanara Langdon kshoemaker@infinsource.net	University Training Management Comp Philadelphia, PA	New Hires 2022	Employee Onboarding Wizard Assigned To: Multiple	Waiting on Employee

Detail View:

Actions	Employee No.	Rehire	Email Address	Hire Date	Legal Name	Onboarding T.	Initiated By	Initiation Date	Current Step	Assigned User
	Q	Q	Q	Q	Q	Q	Q	Q	Q	Q
...	Jonathan Lattimer		essuser121@g...	3/21/2022	University Train...	New Hires 2022	karentraining	3/18/2022	Client HR Onboa...	Client User - HR
...	Sanara Langdon		kshoemaker@in...	3/18/2022	University Train...	New Hires 2022	karentraining	3/18/2022	Employee Onbo...	Multiple



Bypass option to override the workflow process

The screenshot displays the iSolved HCM web application interface. The top navigation bar includes the iSolved logo, user profile (Karen Shoemaker), and client information (UMC123 - University Training Management Company). The left sidebar contains a menu with categories like EMPLOYEE MANAGEMENT, EMPLOYEE ADMIN TOOLS, EMPLOYEE SELF-SERVICE, CLIENT MANAGEMENT, PAYROLL PROCESSING, REPORTING, and CUSTOMER SERVICE. The 'Pending Employees' page is active, showing a table of employees in the onboarding process. A red box highlights the 'Bypass Employee Wizard' and 'Resend Activation Email' options in the Actions column for the employee 'Sandra Langdon'.

Client: UMC123 - University Training Management Company

Pending Employees

isolved University

+ Initiate Onboarding Expand All Groups Collapse All Groups Clear Grouping/Filters

Drag a column header here to group by that column

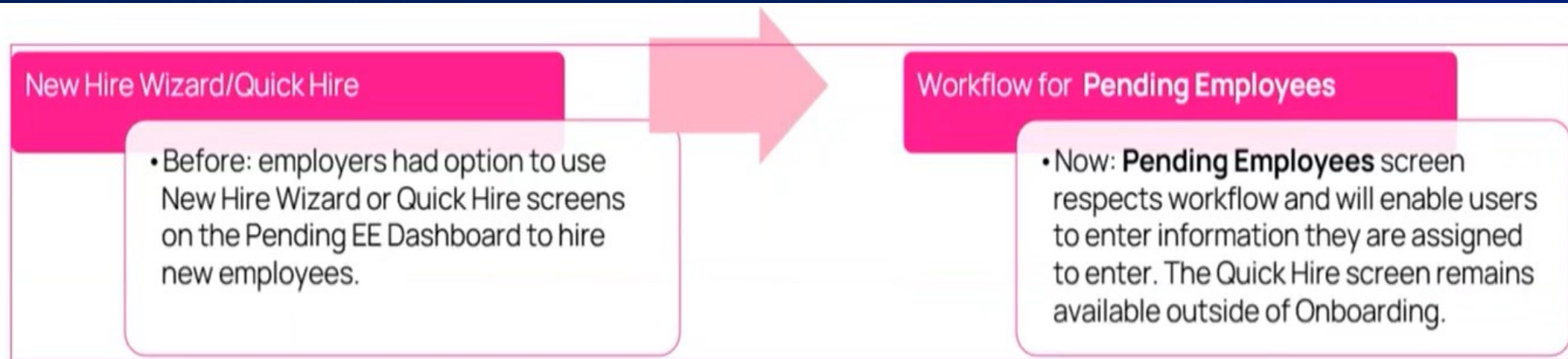
Actions	Employee	Legal	Onboarding Template	Current Step	Status
> ...	Shane Adamski kshoemaker@isolvedhcm.com	University Training Management Comp Mount Laurel, NJ	New Hires 2022 v 2	Client Onboarding - Client User Assigned To: Client User - Onboarding	Assigned to Me
> ...	Susie Jones kshoemaker@isolvedhcm.com	University Training Management Comp SARASOTA, FL	New Hires 2022 v 2	Client Onboarding - Assigned Manager Assigned To: Multiple	Assigned to Me
> ...	Sandra Langdon s.langdon@infinisource.net	University Training Management Comp Philadelphia, PA	New Hires 2022	Employee Onboarding Wizard Assigned To: Multiple	Waiting on Employee

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New Hires and Rehires will all now be under the Pending Employee screen instead of two different screens.



>	Jonathan Lattimer	University Training Management Comp	New Hires 2022	Client HR Onboarding Wizard	Assigned To: Multiple	Assigned to Me
	@gmail.com	SARASOTA, FL		Assigned To: Multiple		
>	New Hire Wizard	University Training Management Comp	New Hires 2022	Employee Onboarding Wizard	Assigned To: Multiple	Waiting on Employee
	Resend Activation Email	Philadelphia, PA		Assigned To: Multiple		
	kshoemaker@infinisource.net					

