## **Paycor Onboarding**

Client Learning | Participant Guide



You want to make a difference. So do we.™







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#### Welcome

We are excited to have you in the Onboarding class today. A few items to keep in mind throughout the training:

- Questions can also be typed in the chat window.
- The demo environment may differ from your system, but the functionality is the same.

Agenda

- Welcome
- Housekeeping
- Overview
- Onboarding Setup
- Utilizing Onboarding
- Summary and Close

NOTES:



## Duboarding Setup

Menu Selections to Access: Company > Configure Company

- Document Library: Allows documents to be stored for potential new employees to download, review and acknowledge during the hire process.
- Onboarding Groups: Creates an easy way to manage documents in groups that need to be made available to new hires.
- Wizard Configuration: Allows customization of the initial welcome message that a new employee sees during onboarding as well as deciding which information is required during the onboarding process in Perform
- Task List Templates: Allows task lists to be configured that have multiple tasks assigned to multiple people in the organization.



NOTES:



# Utilizing Duboarding

#### Steps to Send an Onboarding Invitation:

- 1. Select Employees
- 2. Select Manage Employees
- 3. Select New Hire
- 4. Enter New Hire First and Last Name
- 5. Enter New Hire Email and Planned Start Date
- 6. Select Work Location
- 7. Select Onboarding Group
- 8. Select Task List Template (optional)
- 9. Send New Hire Invitation

#### Menu Selections to Setup New Hire Time Off Benefits:

- 1. Select Employees
- 2. Select Manage Employees
- 3. Select Employee Name
- 4. Select Time & Attendance Folder
- 5. Select Accrual Setup
- 6. Click +Add Accrual
- 7. Click Save

### Additional Resources

For additional information Onboarding:

- Click **Get Help** in the top right-hand corner for **Onboarding**.
- Contact your **Paycor Representative** with any questions you may have.



NOTES:

