MyAdvantage:
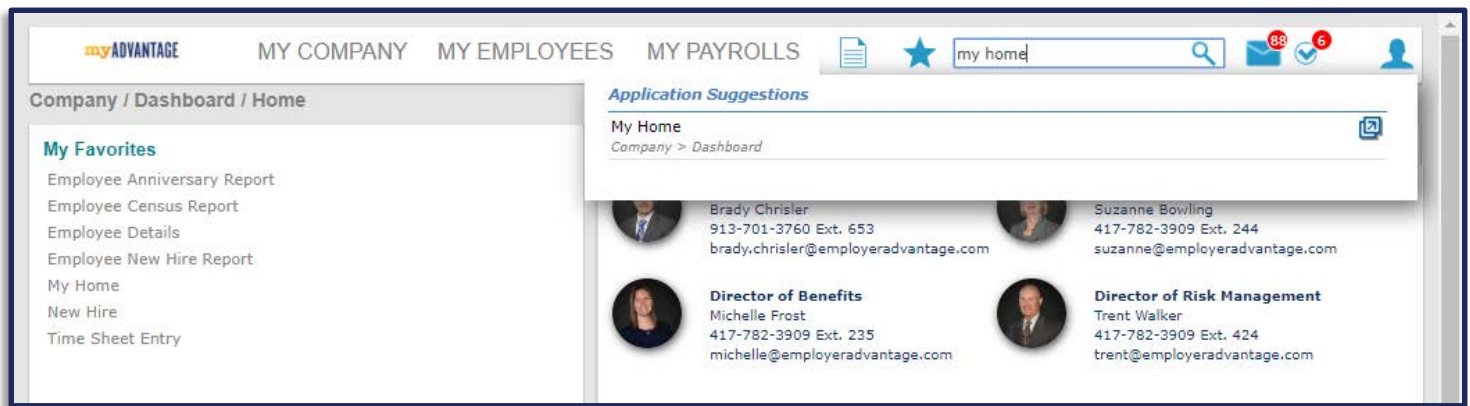
MANAGING YOUR ONBOARDING EMPLOYEES

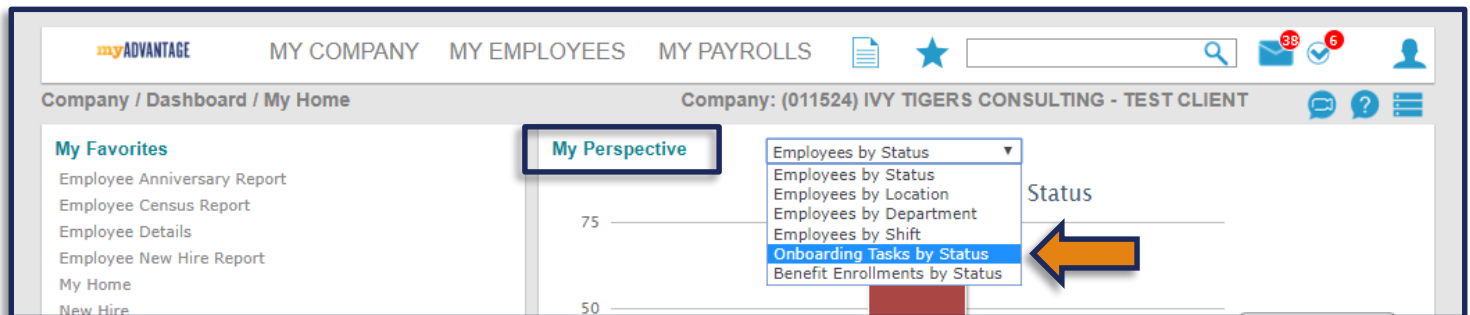# Checking the Status of Current Onboarding Employees

1 **Search for 'My Home' in the MA search bar**
2 **In the 'My Perspective' dashboard, open the drop-down menu and select 'Onboarding Tasks by Status'**

3 **You will see a list of all pending Onboarding employees**

- **Click the employee's name to view form statuses, due dates, and submission dates**
- **Click 'Actions' next to the employee's name to send a reminder email of outstanding action items**

Editing the Onboarding Employee's information

- **Search for 'Workflow Maintenance' in the MA search bar**
- **Change 'Workflow Type' to 'Onboarding', and 'Action' to 'Edit New Hire'**
- **Type in the 6-digit client ID (located on the main screen of MyAdvantage) that the employee is being hired into, and hit the Tab key**
- **To view and edit the Employee's information, including the email address, click 'Edit' to the far-right of the employee name**

---

myADVANTAGE   MY COMPANY   MY EMPLOYEES   MY PAYROLLS

System / Change / Workflow Maintenance

Workflow Maintenance

Workflow Type	Onboarding ▼
Action	Edit New Hire ▼
Client Id	011524 IVY TIGERS CONSULTING - TEST CLIENT

★   ✗   workflow maintenance 🔍

Application Suggestions

Workflow Maintenance
System > Change

Filters

| New Hire Name | |
| SSN | |

[Search]   [Clear]

NOTE: To view your current Onboarding Employees, click the Search button; you can narrow down the list using the search fields

Search Results

New Hire	SSN	Employer Start Date	Client Start Date	Personal Email	Work Email	Action
Cooper, Bradley	4321	11/18/2019	11/18/2019			Edit
Russell, Johnny	8585	07/10/2019	07/10/2019			Edit
Washington, George	4444	09/11/2019	09/11/2019			Edit
Stewart, Patrick	5555	08/23/2019	08/23/2019			Edit
ZZBENEFITS, TEST	4596	10/18/2019	10/18/2019			Edit
Potts, Pepper	3456	11/04/2019	11/04/2019			Edit
Merrifield, Whit A	7777	06/27/2019	06/27/2019			

Edit New Hire

First Name	Pepper
Last Name	Potts
Social Security Number	800-12-345
Client ID	011524 IVY TIGERS CONSULTING - TEST CLIENT
Date of Birth	
Employer Start Date	11/04/2019
Client Start Date	11/04/2019
Personal Email	pepper.potts@employeradvantage.com
Work Email	

Send "Workflow Launched" Email

NOTE: Once an employee registers their user account, the Employer and Client Start Dates can no longer be edited

NOTE: Clicking here will resend the initial welcome email

User

This new hire has not registered for a user account.

[Save]   [Cancel]

Approving the I-9 Form

1 **Click the My Tasks checkmark icon in MyAdvantage**
   - This page will display a list of all pending I-9 forms

2 **'Grab' the pending I-9 form to move it into your queue**
   - Forms under 'Assigned to You' can be reviewed and approved; forms under 'Available to You' will need to be 'grabbed' before you can review them
   - Selecting 'Grab' will move the form into your 'Assigned to You' field, and will now be available to review

5

3 **Select the pending I-9 form that you want to review**
- **You'll be presented with an incomplete copy of the new hire's I-9 form**
- **Select 'Deny' to send the form back to the new hire for corrections**
- **Select 'Return To Queue' to send the form back to the 'Available to You' queue to allow another I-9 approver to grab the form**
- **Select 'Next' to continue**

STEP 3

myADVANTAGE   MY COMPANY   MY EMPLOYEES   MY PAYROLLS   🔍   ✉ 91   ✓ 7   👤

Company / Action / Approvals Pending   Company: (011524) IVY TIGERS CONSULTING - TEST CLIENT   ❓ ☰

Approvals Pending (Assigned to You)   ↻

Approval Type	Approval Step	Reference	Generated By	Date Created	Time Created	Due Date
I-9 Section 2	1	Gordon, Alex		06/24/2019	10:11PM	06/30/2019
I-9 Section 2	1	Merrifield, Whit		06/25/2019	10:35AM	06/30/2019
I-9 Section 2	1	Potts, Pepper		12/18/2019	10:57AM	11/07/2019

I-9 Section 2

Review I-9 Section 1

View Instructions   Download

NOTE: Click here to be redirected to the USCIS website with detailed instructions for completing this form

Review Section 1 to ensure the employee completed it properly. If you find ... make corrections, as necessary.

If the employee completed Section 1 properly, review the document(s) the employee presents from the Lists of Acceptable Documents. If the documents reasonably appear to be genuine and to relate to the employee, you must accept the documents. Click Next to enter the documents in Section 2.

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Employment Eligibility Verification
Department of Homeland Security
U.S. Citizenship and Immigration Services

USCIS
Form I-9
OMB No. 1615-0047
Expires 08/31/2019

▶ **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)	First Name (Given Name)	Middle Initial	Other Last Names Used (if any)
Potts	Pepper	N/A	N/A

Address (Street Number and Name)	Apt. Number	City or Town	State	ZIP Code
1027 S Main St Suite	N/A	Joplin	MO	64801

Date of Birth (mm/dd/yyyy) | U.S. Social Security Number | Employee's E-mail Address | Employee's Telephone Number

Return To Queue   Deny   Next ›

4 **Enter the new hire's I-9 documents**

- **The system will require either one List A document OR a combination of one List B and List C documents**
- **The fields will update depending on what list of documents you select in the Document Title dropdown menu**
- **Ensure all documentation information is entered accurately and click 'Next'**

5 **Enter additional information as needed**

- **When finished, click 'Next'**

I-9 Section 2

Enter Documents   View Instructions

Enter the document(s) the employee presents from the Lists of Acceptable Documents. Complete all fields for each document.

List A
Identity and Employment Information

Select a document from List A or List B:

* Document Title

A - U.S. Passport ▼

* Document Number

EXAMPLE1234

* Issuing Authority

U.S. Department of State ▼

* Expiration Date - if any (Choose "N/A" if none)

01/01/2025 📅 ☐ N/A

< Back   Next >

NOTE: Check this box if the document has no expiration date

I-9 Section 2

Additional Information   View Instructions

Use this space to notate any additional information required for Form I-9. You may leave this field blank if the employee's circumstances do not require additional notations.

< Back   Next >

6 **Certify accuracy of the I-9 documents and electronically sign the I-9 form**
- This page will auto-populate with the information already provided previously in the Onboarding process
- Provide any missing information, such as job title and name
- Check the acknowledgment checkbox to electronically sign the form
- When finished, click 'Next' to continue

I-9 Section 2

Certification   View Instructions

I attest, under penalty of perjury, that
(1) I have examined the document(s) presented by the above-named employee,
(2) the above-listed document(s) appear to be genuine and to relate to the employee named, and
(3) to the best of my knowledge the employee is authorized to work in the United States.

*The employee's first day of employment:

> 11/04/2019

Signature of Employer or Authorized Representative

☐ By checking this box, I attest that I am electronically signing Form I-9 Section 2.

*Title of Employer or Authorized Representative

>

*Last Name of Employer or Authorized Representative

> WILSON

*First Name of Employer or Authorized Representative

> WOODROW

*Employer's Business or Organization Name

> IVY TIGERS CONSULTING - TEST CLIENT

*Employer's Business or Organization Address (Street Number and Name)

> 4 PRINCETON AVE.

*City or Town

> JOPLIN

*State

> MO ▼

*Zip

> 64801

[< Back] [Next >]

7 Submit the I-9 form

- From this page, you may download the completed I-9 form or save it to your computer
- Review the completed form one final time for accuracy, then click 'Submit' to submit the form
- Select 'Yes' on the Submit Confirmation dialog box to complete the submission
- Congratulations! You have successfully submitted the I-9 form.

I-9 Section 2

Review I-9   View Instructions

Review the completed Form I-9 and then click Submit.

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Employment Eligibility Verification
Department of Homeland Security
U.S. Citizenship and Immigration Services

USCIS
Form I-9
OMB No. 1615-0047
Expires 08/31/2019

Section 2. Employer or Authorized Representative Review and Verification
(Employers or their authorized representative must complete and sign Section 2 within 3 business days of the employee's first day of employment. You must physically examine one document from List A OR a combination of one document from List B and one document from List C as listed on the "Lists of Acceptable Documents.")

Employee Info from Section 1	Last Name (Family Name) Potts	First Name (Given Name) Pepper	M.I. N/A	Citizenship/Immigration Status 1

List A Identity and Employment Authorization	OR	List B Identity	AND	List C Employment Authorization
Document Title U.S. Passport		Document Title N/A		Document Title N/A
Issuing Authority U.S. Department of State		Issuing Authority N/A		Issuing Authority N/A
Document Number EXAMPLE1234		Document Number N/A		Document Number N/A
Expiration Date (if any)(mm/dd/yyyy) 01/01/2025		Expiration Date (if any)(mm/dd/yyyy) N/A		Expiration Date (if any)(mm/dd/yyyy) N/A
Document Title N/A				
Issuing Authority N/A		Additional Information		QR Code - Sections 2 & 3 Do Not Write In This Space

Download

< Back

Submit

Submit Confirmation   ✕
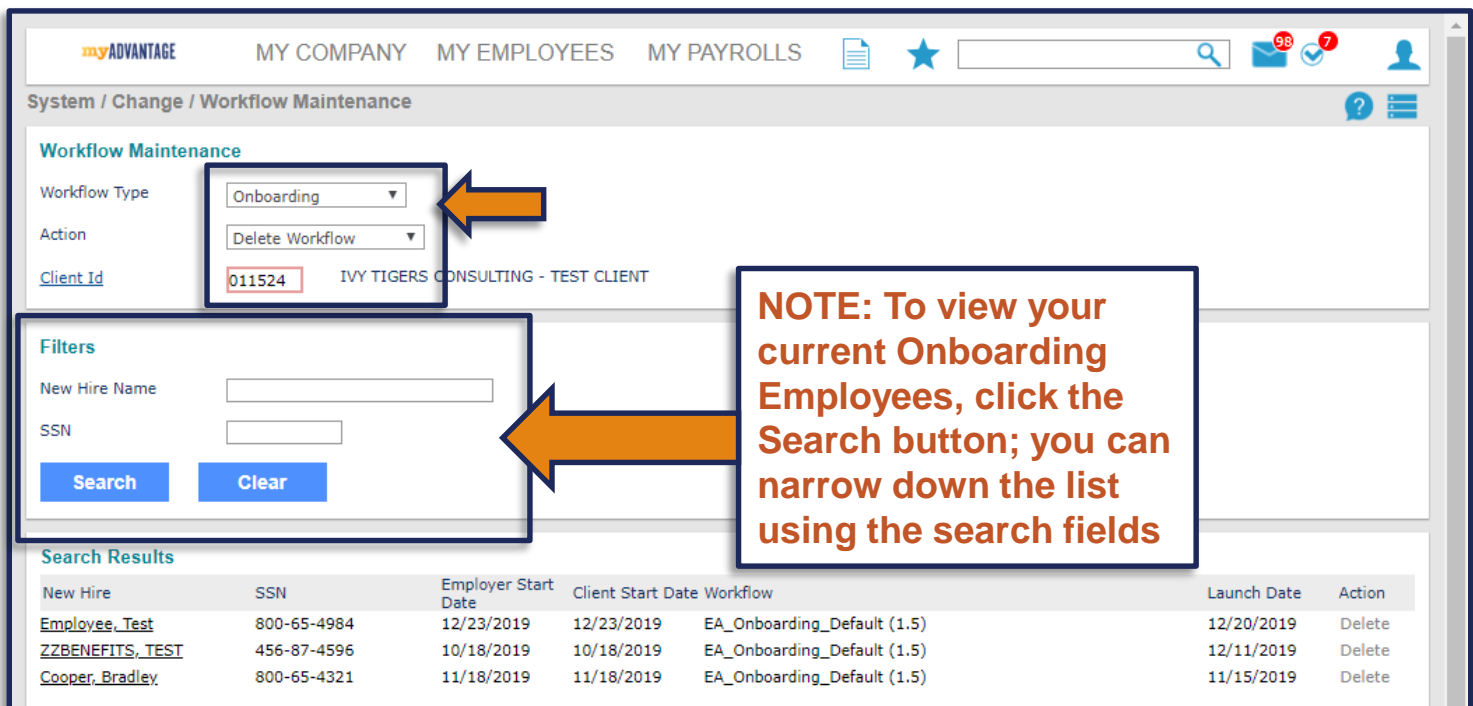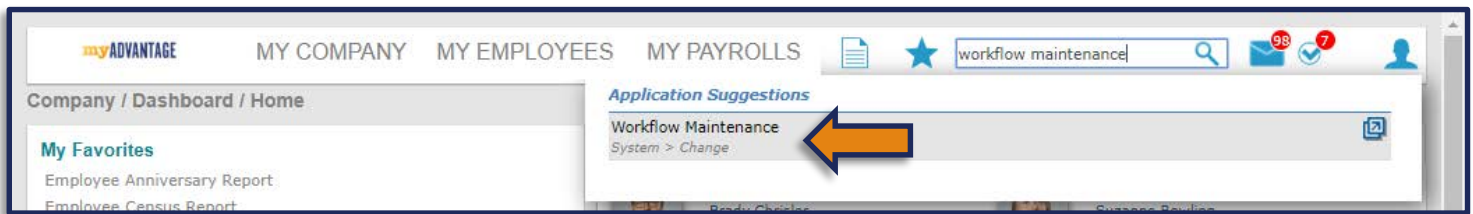
Are you sure you want to submit Form I-9?

Yes   No

Deleting an Onboarding Workflow

1 **Locate the employee's Onboarding workflow in Workflow Maintenance**
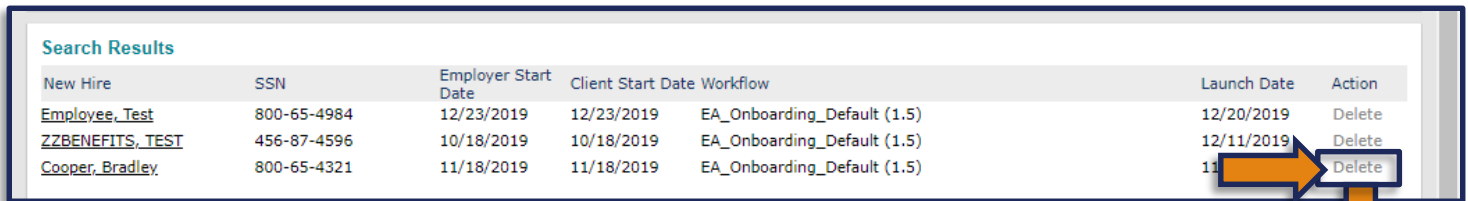
- Search for 'Workflow Maintenance' in the EA search bar
- Change 'Workflow Type' to 'Onboarding', and 'Action' to 'Delete Workflow'
- Type in the 6-digit client ID (located on the main screen of MyAdvantage) that the employee is being hired into, and hit the Tab key

STEP 1

NOTE: To view your current Onboarding Employees, click the Search button; you can narrow down the list using the search fields

NOTE: If you are no longer going to hire the employee through Onboarding for any reason (i.e., the employee was terminated before their start date, you are going to manually hire them, etc.), then you will need to DELETE the Onboarding Workflow
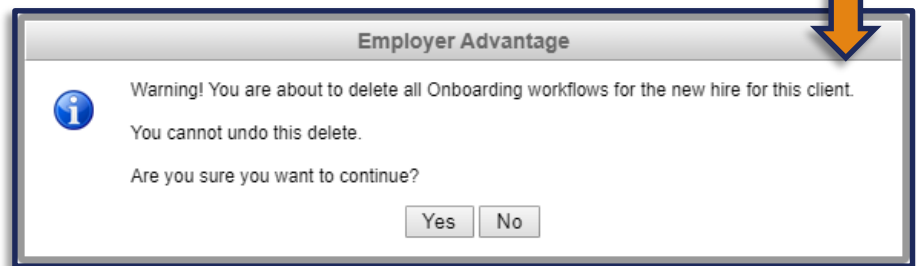
② Delete the Onboarding Employee's Workflow

- **Locate the Onboarding Employee which is to be deleted, and select 'Delete' on the right-hand side**
- **Select 'Yes' to permanently delete the Onboarding Workflow and remove the employee from Onboarding**

Search Results

New Hire	SSN	Employer Start Date	Client Start Date	Workflow	Launch Date	Action
Employee, Test	800-65-4984	12/23/2019	12/23/2019	EA_Onboarding_Default (1.5)	12/20/2019	Delete
ZZBENEFITS, TEST	456-87-4596	10/18/2019	10/18/2019	EA_Onboarding_Default (1.5)	12/11/2019	Delete
Cooper, Bradley	800-65-4321	11/18/2019	11/18/2019	EA_Onboarding_Default (1.5)	11	Delete

Employer Advantage

Warning! You are about to delete all Onboarding workflows for the new hire for this client.

You cannot undo this delete.

Are you sure you want to continue?

Yes   No