ONBOARDING SURVIVAL GUIDE

Tips and Tricks to Create a Positive New Hire Experience

BerniePortal

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Onboarding Survival Guide

Tips and tricks to create a positive new hire experience

Why Is the Onboarding Experience So Important?

You've invested significant time and effort into the hiring process and have scored a quality hire for your company. Hiring a skilled candidate is a great accomplishment, but you're not done yet. The next obstacle to overcome is creating a culture of engaged productivity, which begins during the onboarding process.

The onboarding experience can impact your turnover rate. How exactly? Onboarding is the first interaction a new hire has with their new employer as an official employee. Much like a first impression with a new acquaintance, this first interaction lays the groundwork for how an employee perceives your organization. A negative onboarding experience can color the new employee's perception of your organization. A positive onboarding experience can create the foundation for a positive relationship between employer and employee.

How to Create a Positive Onboarding Experience

Onboarding an employee and getting them up to speed can be a hassle. It involves planning, paperwork, and labor law expertise. With all of these elements combined, bringing on a new hire can be stressful and time consuming—especially when you have a million and one other things to get done. Here is a list of onboarding best practices that will increase your onboarding efficiency and improve your new employee's onboarding experience.

✔ ## Onboard Online

Perhaps the most valuable onboarding "hack" is getting onboarding done before your new employee's first day. By taking onboarding online, you can eliminate the need for paperwork, decreasing the time it takes to onboard a new hire. Onboarding online also allows you to maintain a record of your new hire documents without any added steps or paperwork. To set up online onboarding, we recommend using an HRIS, like BerniePortal, that allows employee self-service access to online benefits and onboarding.

Onboard a New Hire ⊗

Login

Do you have an email address for the new hire?
◉ Yes ○ No

Email *
testing99333332@mailinator.com

Confirm Email *
testing99333332@mailinator.com

The employee will receive login instructions via email.

Info

Employer name *
Bark & Park

First name *
Jenny

Last name *
New Hire

Preferred name

Manager
Smith, Joey

Job Title *
Sales Representative

# ✔ Have Your New Hires Onboard Before Their First Day

Online onboarding provides your employees with a way to complete onboarding paperwork before their first day. This strategy benefits both the administrator and the employee. This strategy benefits the employee by decreasing the stresses of first-day paperwork, and benefits the employer by allowing the new hire to begin learning their position sooner. Ultimately, this decreases the time it takes an employee to reach full productivity.

✔ Get Benefits Administration Out of the Way

Once your new hire has completed the necessary onboarding paperwork, instruct them to get started on benefit elections. While employees typically have at least a month to make benefit elections, providing the opportunity to enroll in benefits before their start date can be a great way to relieve benefits-related stress. To offer online benefits administration, we recommend using an HRIS platform that allows employees self-service access to benefits and onboarding. Interested in learning more about online benefits administration? Check here to see how an HRIS can simplify benefits administration.

For an HRIS like BerniePortal, benefits administration and onboarding go a step further. BerniePortal's all-in-one HRIS offers a payroll feature that can take the information from benefits administration and directly apply it to your scheduled payroll. That means that any benefits employees pay for out-of-pocket are automatically deducted from their paycheck without your oversight. The second an employee elects their benefits, BerniePortal is already adapting to create accurate payrolls that reflect those changes.
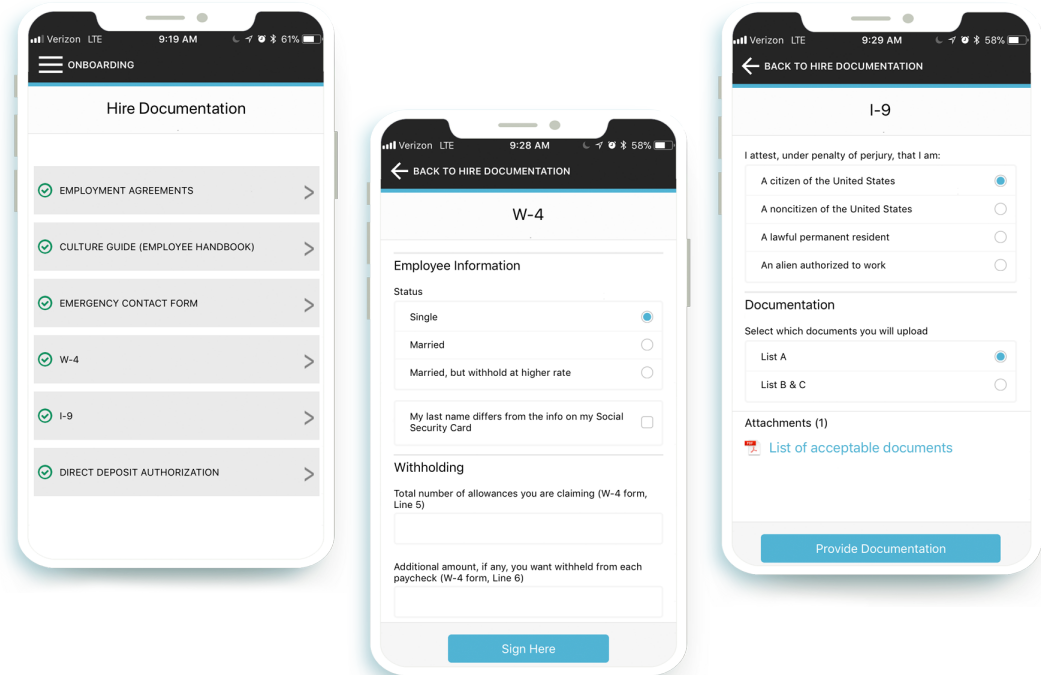
✔ Compile a Culture Guide

During the onboarding process, employees should review and acknowledge a Culture Guide. This Culture Guide should include sections on your organization's history, mission, and vision; operational policies; cultural expectations, like how to address others and set meetings; even how to offboard gracefully. Your Culture Guide should be readily accessible to employees at all times. If you use onboarding software, attach this document to your onboarding process so that each employee's acknowledgement of the terms are recorded. Interested in learning more about Culture Guides? Start the process of creating your own with HR's Guide to Culture Guides.

✔ Have an Agenda Ready

The employee onboarding experience significantly impacts retention. If an employee has a good experience, that employee will likely become much more committed to your organization.

On your employee's first day, you should have an agenda that outlines a timeline of tasks and goals, with the steps to get started. Begin by setting objectives that aim to help your new employee understand their position and the cultural expectations of your organization. This timeline of tasks and goals should extend for a significant period of time so that the new hire has time management from the beginning. We recommend the 30/60/90 plan to set reasonable goals and expectations for the first 30 days, 60 days, and 90 days of employment.

✔ Provide Available Resources

New hires may feel overwhelmed when starting at a new organization.You can alleviate some of this stress by providing extra resources to help the new hire find their footing. If you have a Culture Guide, then your new employee already has everything they need to know. A Culture Guide acts as reference material for your whole organization, answering common questions and outlining complicated processes. You may have additional resources to your employee handbook or Culture Guide. The onboarding feature of BerniePortal provides a home for all of your onboarding documents, from necessary compliance paperwork to an onboarding checklist, and any additional materials you provide new hires. An onboarding checklist will help you keep a new hire's first days on track, and help you stay organized.

Onboarding Checklist

Onboarding a new hire involves juggling multiple responsibilities at once. With so much to do, it's easy to forget something.

Here's an onboarding checklist that will help you stay on top of all your new hire responsibilities.

DOWNLOAD CHECKLIST

Common Onboarding Documents

When it comes to onboarding documents, it's normal to feel like you're decoding alphabet soup. Here's a quick breakdown of common onboarding documents and the purposes they serve:

I-9

Form I-9 is a document that must be completed by every employee in the United States. An I-9 is used to verify an employee's eligibility to work in the U.S., so it's critical to gather this documentation to stay compliant with federal law. In order to complete the I-9, each employee must submit a completed I-9 Form alongside evidence of identity and citizenship. To correctly submit a form, you must have specific documents from your new employee, like a Social Security Card or valid ID. The employer is responsible for keeping record of each I-9 for three years after the date of hire or one year after termination, whichever date is later. For more information on Form I-9 and the supporting documents, check here for the government's rules and list of acceptable supporting documentation.

W-4

The W-4 is a form that employees fill out so that employers can withhold the correct federal income tax from each employee's pay. This form should be completed by employees upon hire *and also* in the event of a major financial change such as marriage, childbirth, or divorce. The Internal Revenue Service (IRS) advises employers to keep W-4 Forms on file for at least four years after filing the 4th quarter for the year.

State Withholding Forms

Some states impose income taxes in addition to the existing income tax required by the federal government (W-4 deductions). Each state that withholds this additional amount from employee paychecks must administer a state withholding form to all employees. These forms are used to identify the additional amount of income that an employer withholds from its employees' paychecks. For more information about your state's income tax witholdings, check here for your specific states tax forms and filing options.

Culture Guide

Culture Guides are company-specific documents that organizations distribute to their employees upon hire. These documents establish governing principles of employment, operational policies, employee benefits information, regulations for leaves of absence, and general standards of conduct. After distributing a Culture Guide to a new employee, the employee should review the guide and affirm their understanding by signing an agreement to the terms. If you ever need to make updates to your Culture Guide, an HRIS can request all employees review the new information and sign a new agreement.

Direct Deposit Form

A direct deposit form is used to capture employee banking information so that the employer can transfer employee pay directly to the employee's account(s). This method is used in lieu of printing and distributing paychecks. In order to route money directly into an employees account, a direct deposit form should require:

- the type of account the money is being transferred to (i.e. checking or savings)
- a bank account number
- the bank name
- the routing number
- the amount the employee wants to deposit into each account listed

Does your state require a withholding form?   **LEARN MORE**

A robust payroll feature can automatically take the information from the direct deposit form submitted during onboarding and add it to your payroll system. That means you won't need to type in every new hire's bank account information anymore, since an HRIS like BerniePortal takes care of that work for you.

Documenting Compliance

What to Document:

In order to stay compliant, employers should maintain record of all employee agreements, notices, and onboarding forms. For each of these documents, employers should keep a record of the following:

- ✔ Proof of document distribution
- ✔ A written procedure taken to administer documents
- ✔ A timeline of actions taken to comply with legal standards
- ✔ The final version of the document
- ✔ Employee recognition of the documents and acknowledgement to its terms

Reasons to Maintain Record of Documents

"Good faith" can reduce penalties:

Ideally, your organization is fully compliant. But sometimes, things slip through the cracks and may put your organization at risk of penalities. Keeping documentation can help you out. Through a legal principle called "good faith," employers can significantly reduce the fines and penalties resulting from noncompliance. So what exactly does good faith mean? Good faith means that the organization made a true effort to comply with federal, state, and local laws. To prove good faith, an organization needs documentation of efforts made to reach compliance standards. One of the best ways to prove good faith is to conduct an internal audit to fully review your procedures to achieve compliance.

Documentation can improve internal practices:

Documentation can also help improve internal practices. By reviewing a timeline of a company's efforts to comply with various regulations, administrators have the opportunity to identify trends within their own organization. Once these trends have been identified, they can assess factors within their business like: risk, efficiency, and company culture. Taking a fine-toothed comb to your compliance documentation can give employers and administrators key insight on their organization, resulting in improvements that facilitate growth.

BerniePortal Onboarding

BerniePortal is a robust, all-in-one **HRIS platform** for small and mid-sized employers. Alongside other HR features that can streamline your administrative tasks, BerniePortal also facilitates onboarding for both new hires and administrators. Using BerniePortal, employers can customize and administer onboarding that provides employees self-service access to compliance paperwork, your organization's documentation, and benefits elections before their first day. The onboarding and benefits administration features of BerniePortal create a smooth onboarding process that encourages new hires to hit the ground running.

Simplify the onboarding process for HR and new hires with BerniePortal!

Save Time

Track New Hires

Eliminate Paperwork

LEARN MORE

How BerniePortal Onboarding Benefits Employers and Employees

Not only does our seamless onboarding process save time, money, and energy, it also enables you to make a positive first impression on your new hire. BerniePortal's onboarding feature is easy to navigate and convenient for both the new employee and the employer. Providing an employee-facing tool that your organization can customize to transition new hires into their position quickly and efficiently will build trust in your organization *and in* your HR role. Building a good rapport with your people from the first day can help you boost retention, keeping your organization going and growing.

Onboarding paperwork   (X)

Who would you like to send a reminder to?
- (●) Only Jane Smith
- ( ) All employees that need to complete onboarding paperwork

Message text

> Jane,
>
> Please complete your onboarding paperwork before your first day.
>
> Best,
> HR

SEND REMINDER   CANCEL

STATS

Current enrollment   Onboarding   Notices   Turnover

Show data for   2018   ▲▼

Monthly New Hires	Salary	Benefits payroll deduction
AVG	AVG	AVG
2	$77143	$178
MIN 1 — MAX 3	MIN $50000 — MAX $100000	MIN $96 — MAX $253

New Hires

	JAN	FEB	MAR	APR
3			●	
2		●		
1	●			●
0				

Documenting Compliance with BerniePortal

If you have 15 employees and each one needs to complete a W-4, I-9, Culture Guide acknowledgement, and an additional 10 compliance-related notices, how many documents must you track and maintain? At 13 documents for 15 employees, you're looking at 195 documents total—and most employers require even more. As an employer or administrator, you would be responsible for keeping record of all 195 documents and producing those documents in the case of an audit. Imagine how much easier it would be to track and store all those documents if you had a system that did it for you.

To simplify document compliance, many employers use BerniePortal's onboarding feature. Because BerniePortal is an online platform, employees can submit digital copies of their paperwork through BerniePortal. Online forms and documents are then stored in both the employee's account and the administrator's account for year-round storage and compliance— minus the paperwork.

Conclusion

Onboarding a new hire involves attention to detail, careful planning, and appropriate follow-up. For many human resources leaders, this can be a lot to manage considering every other responsibility that falls under the rather large umbrella of "HR." Unfortunately for administrators, the breadth of HR responsibilities doesn't necessarily offer room for flexibility. New hires are looking for affirmation that they made the right career decision by taking on a new job —onboarding is the first opportunity for HR to prove it. By creating a fine-tuned onboarding system, you can create a positive onboarding experience for each new hire, which can improve retention and company culture.

BERNIEPORTAL

**Interested in learning more about BerniePortal's solution to onboarding?
Visit our website and set a demo today:**

www.BerniePortal.com