iSolved Onboarding Steps

Initiate New Hire Onboarding

Go to > Employee Management > Initiate New Hire Onboarding

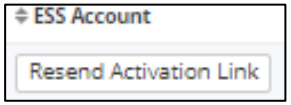
Complete the information on this page:

1. Select Legal Company
2. Select Work Location
3. Select Onboarding Template
4. Type employee name
5. Type email address. Can be personal or work. Email address **MUST** be an active account!
6. Type hire date (Format must be MM/DD/YYYY)
7. There may be other dropdowns you need to select based on the configuration of your account.
8. Once all information is entered, click "Save" on the blue action bar. The moment you click "Save", your employee will receive an email with instructions and a link to login and complete Onboarding.
9. Leave Manager/Supervisor Blank.
10. Skip to Pending Employee Dashboard.

*****Please note the following*****

The email link for Onboarding and Reboarding is good for 72 hours. If the employee waits too long, you can send a new email by doing the following:

3. Go to > Employee Management > Pending Employee Dashboard
4. Click Resend Activation Link



Initiate Rehire Reboarding

Go to > Employee Management > Employee Maintenance > General

From the employee list, change the status to terminated, click apply, and then click on the employee you want to rehire.

1. Click rehire on the blue action bar
2. The system will default to rehire using reboarding. You can click the bubble for rehire if you do not want to use reboarding.
3. Type rehire date (format must be MM/DD/YYYY
4. Select onboarding template
5. Type email address. Can be personal or work. Email address **MUST** be an active account!
6. Select work location
7. There may be other dropdowns you need to select based on the configuration of your account.
8. Once all information is entered, click Save on the blue action bar and your employee will receive an email with instructions and a link to login and complete Reboarding.
9. Skip to Pending Employee Dashboard.

Pending Employee Dashboard

Go to > Employee Management > Pending Employee Dashboard

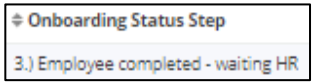
Pending Employee Dashboard allows you to view the progress of employees in new hire onboarding or rehire reboarding.

You can click on the employee name to view their progress and the Onboarding Status Step will confirm where the employee is at in the Onboarding process.

Employee has not started!

Employee has not completed!

Employee completed Onboarding!

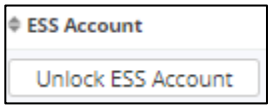


HR will receive an email when the employees clicks "Submit" on the Confirmation Page in Onboarding.

*****Please note the following*****

If the employee gets locked out of onboarding or reboarding, you can unlock by doing the following:

1. Go to > Employee Management > Pending Employee Dashboard
2. Click "Unlock ESS Account"

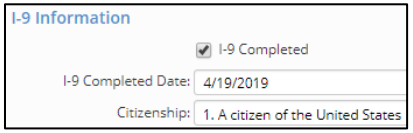


Finish the Hiring Process

Go to > Employee Management > Pending Employee Dashboard

1. Make sure the onboarding Status Step says *Employee completed – waiting HR*
2. Click on New Hire or Rehire

3. Click the box for the employee you are ready to hire and then click "New Hire Wizard"
4. Click dropdown and assign Employment Category and click Next.
5. I-9 Information – make sure this section confirms that the I-9 has been completed and then click Next.



6. Pay Group – click the dropdown and make selection (Frequency will auto assign).
7. Pay Type – click the dropdown and make selection.
8. Job – click the dropdown and select a job title.

*****Manager and Supervisor should be blank*****

9. Tax – verify employee tax information is completed and then click Next.
10. Direct Deposit – this screen will be completed by the employee only if you made it available in Onboarding. Enter the direct deposit or go ahead and click Save to complete the hiring process.

*****Employer I9 Electronic Verification*****

11. To complete the employer side of the I-9 - Go To Employee Management > Employee Maintenance > Employer I-9 Verification

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