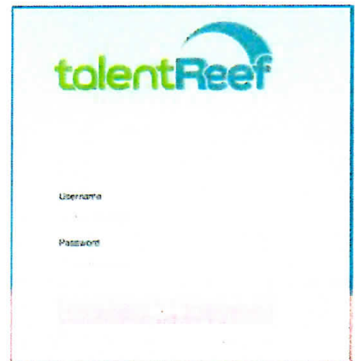
talentReef

Manager Completes Onboarding Process

Manager Completes On-Boarding Process

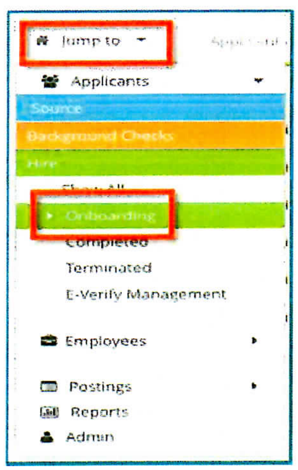
1. Login to Manager Portal: www.talentreeflogin.com



Enter your Username and Password and select "Sign In". You will receive your username and password via email from talentReef. At any time you forget this information, click "**Forgot your password?**" at the bottom of the login page. Here you can reset your password.

Once you log in you will be at the homepage of the Manager Portal.

2. Navigate on the Jump To Menu > Hired: Onboarding section to view all new hires who are currently in the on-boarding process in talentReef.



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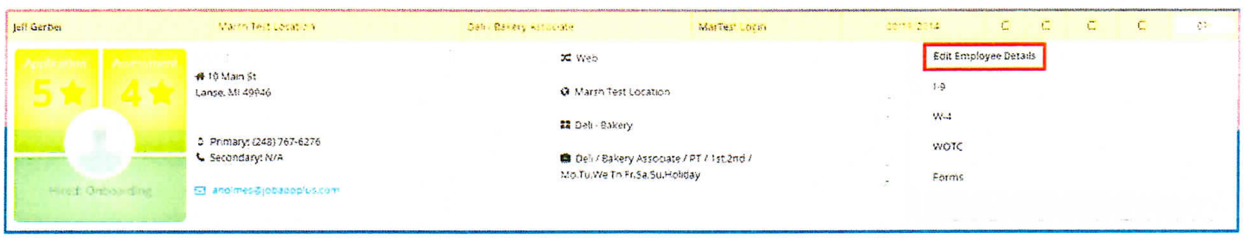
Detailed On-Boarding Instructions

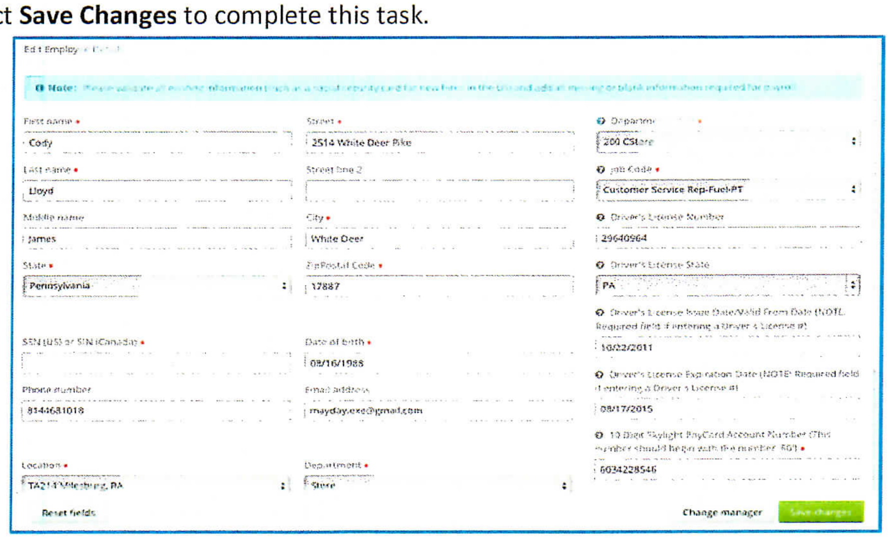
Editing Employee Details

In preparation for viewing the "Edit Employee Details", you will want to collect acceptable forms of identification from your new employee. You will need to use this identification to confirm that the information provided in "Edit Employee Details" section is accurate.

- Click **Edit Employee Details** under the **'Things you can do'** menu on the right

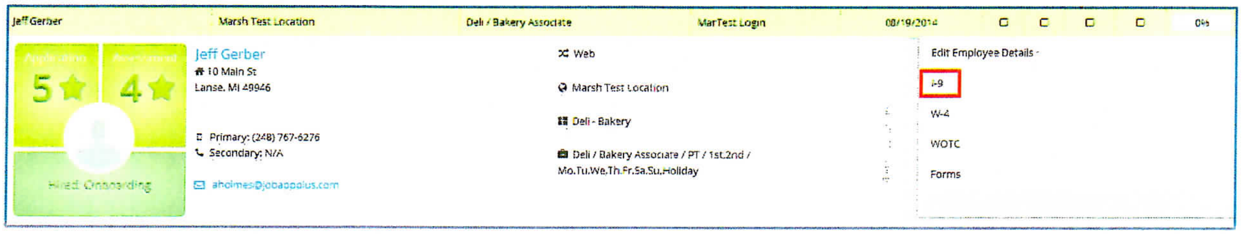


- Ensure that all the information previously filled in is correct, and make any changes necessary. It is very important this information is accurate, as this is the information that is auto-populated into Section 1 of the I-9 form.
- Choose the Pay Rate Type of "Per Hour" and enter the Pay Rate ($).
- Select the Start Date using the calendar icon.
- Select **Save Changes** to complete this task.

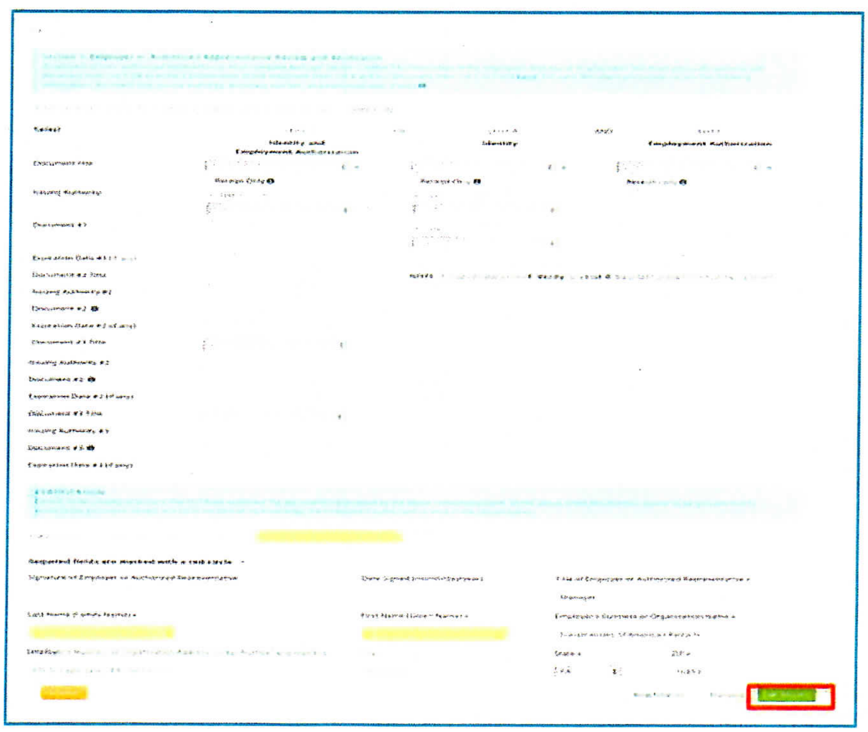


Form I-9 Management

- Select I-9 from the 'Things you can do menu'. This will take you into the form I-9.



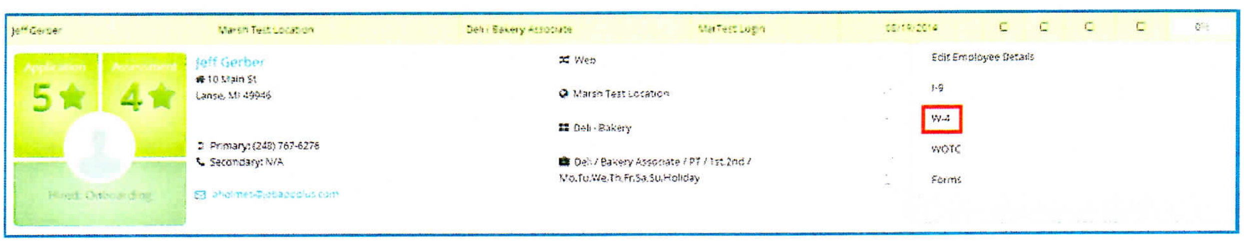
- Review the information in Section 1 and make sure it is correct.
    - If the information is not correct, do not proceed. You will need to go back to the "Edit Employee Details" section and make the necessary changes.
- If all of the information is accurate, then click the **Next** button at the bottom of the page.
- Select the radio button next to either **List A** OR a combination of **BOTH List B and List C**, which includes state or government issued Identification cards, birth certificates and Social Security Cards.
- Select the document type from the drop down and the issuing authority. Enter all required information in the fields including the document number and expiration date. Required fields will be highlighted.



- Enter your name in the fields provided for the **Employer or Authorized Representative**. Check to ensure your title and store location information is correct.
    - Please ensure your First Name and Last Name are entered in the appropriate sections.
- Once you verify that all information is accurate, enter your talentReef login password and then click **Digitally Sign**. Your digital signature will appear in the spot designated for the manager signature.
- The page will close and redirect you back to the Employee Details page.

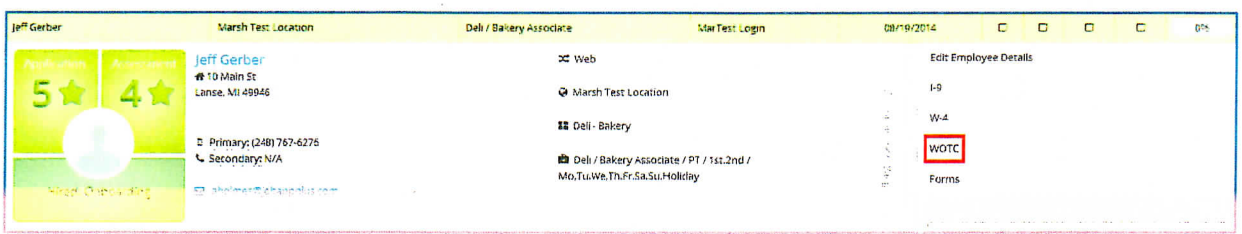
W-4

The employee will be required to complete a federal W-4. If the form is completed properly by the new hire, the box in the W-4 column will already be checked. The manager can view the PDF or update the W-4 on behalf of the new hire.

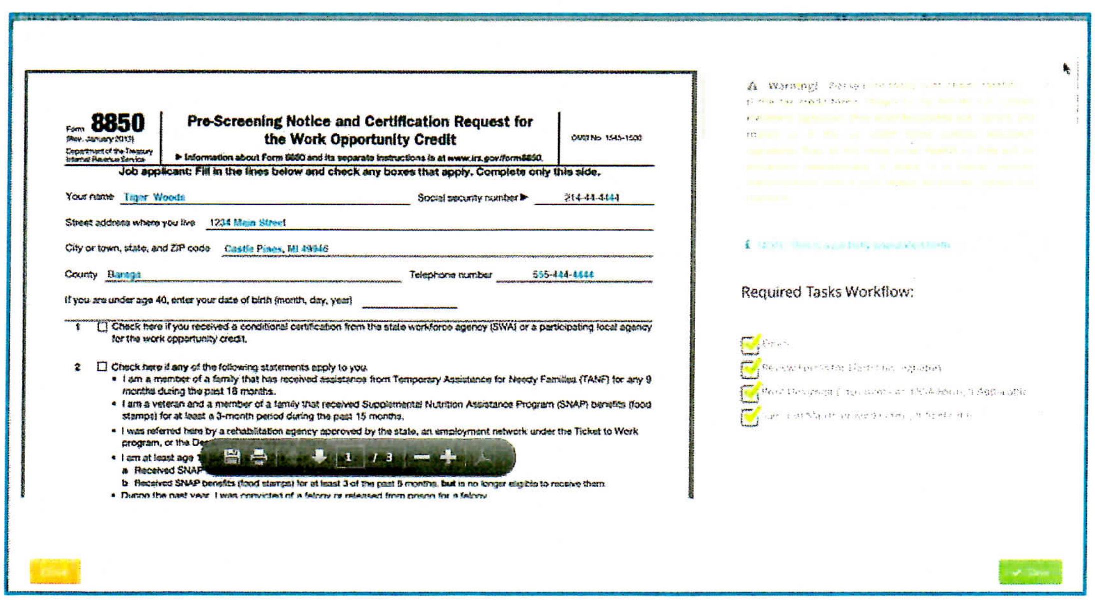


WOTC

The employee will complete the WOTC form along with their other new hire forms. Once the new hire has completed this task, the status will update in the WOTC section.

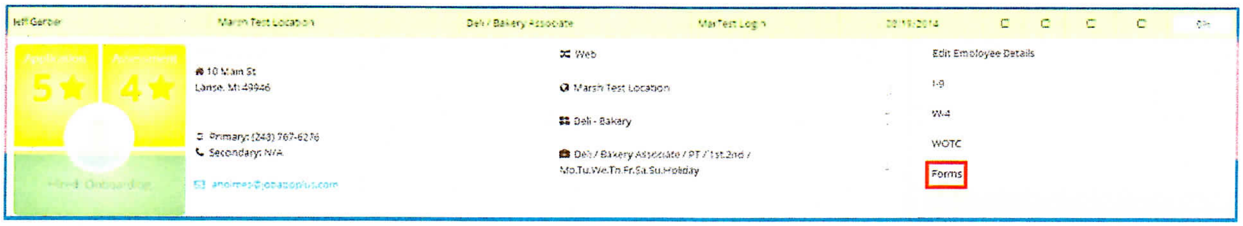


- If the new hire has not completed the form it will inform the manager the applicant still needs to complete the WOTC interview.
- If the new hire does not qualify for the WOTC credits it will inform you that the applicant completed the WOTC Questionnaire and is not eligible. No further action is needed.
- If you select the WOTC section and the 8850 WOTC Questionnaire form opens, follow the Required Tasks Workflow and then select save.

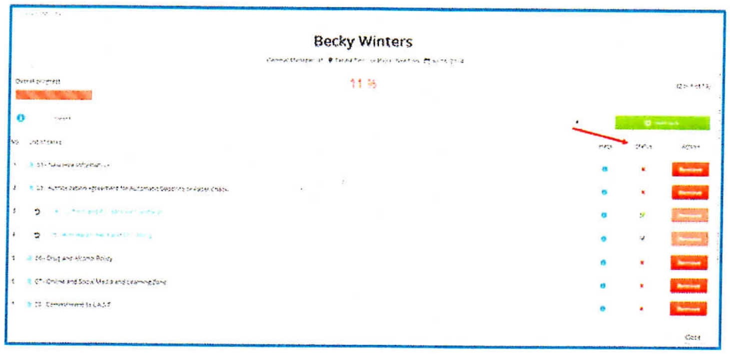


Forms

- The Forms bar will show the progress of the new hire forms that have been completed by the new hire. In order to complete the hiring process, the forms will need to reach 100% and the status bar will turn green. This happens once the new hire and Manager have both finished their portion of the forms.
    - Red Task box = New hire has tasks to complete.
    - Orange Task box = New hire has completed their tasks. Action items needed by the Manager.
    - Green Task box = Tasks are 100% completed.



- Some forms will require action from you as the Manager, including reviewing and signing off on forms. Click on **"Forms"** from the list on the right side. This will open the "Onboarding Tasks" list. View what forms are incomplete or what is pending and requires your review. By each form, to the right, you will either see the status of the form, a yellow exclamation point, red "X" or green check mark.
    - The yellow exclamation marks indicate that there is action to be completed by you, the Manager. The form is not complete until the Manager reviews the form, completes any necessary items and enters their electronic signature.
    - A Red "X" next to a form means that the employee has not yet completed the form. The Manager will need to contact the employee to request they log back in and complete the outstanding form.
    - A green check mark next to a form means that the employee has completed their piece, and there is no further action for the Manager.
    - For forms that require Manager action, click on the blue name of the form to open it. Complete any required fields, and electronically sign the form by clicking **Submit**, then **OK**, and typing your login password. After this, the yellow action icon will change to a green check, meaning the form is complete.
- As a Manager, you can view any form that your employee has submitted by clicking on the blue task description. If you are unsatisfied with what the employee submitted, you can send the form back to the employee to complete again by clicking the back arrow to the left of the document title.



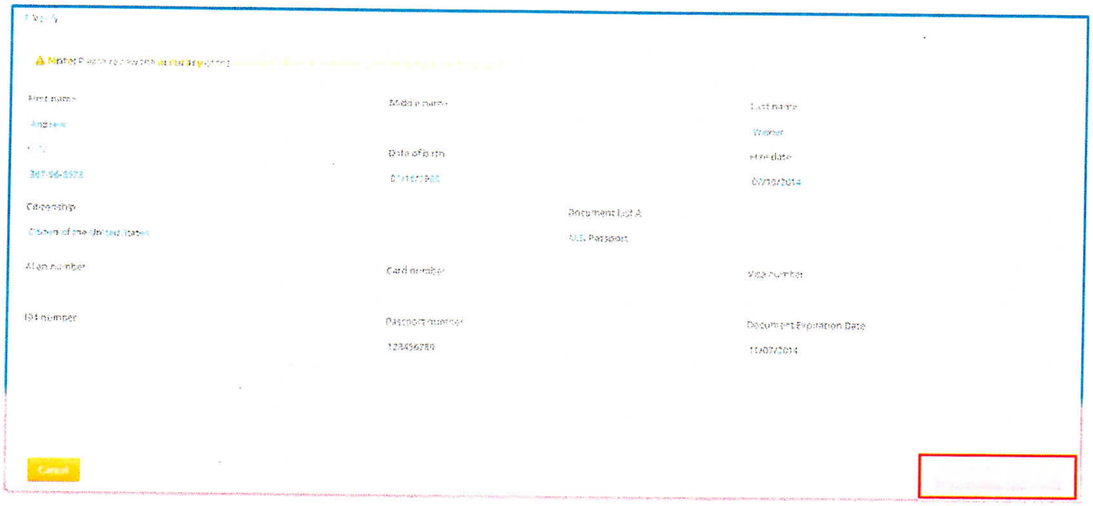
- On the top of the task screen is information about the employee and the task completion percentage. **This should be 100% by the completion of the employee's new hire orientation.**

Submitting an E-Verify Request

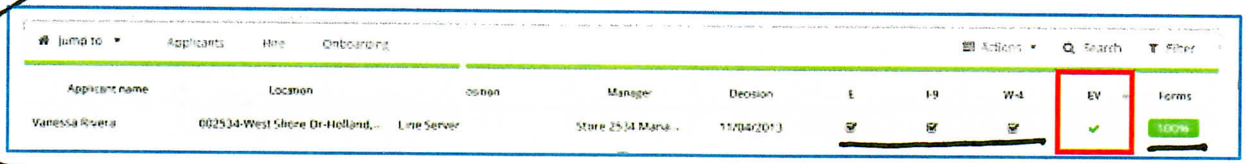
- Once all of the previous tasks have been completed, you will need to submit the E-Verify request for the new employee and manage the E-Verify results. After the electronic I-9 is complete, press the **E-Verify** button to check work authorization status of new hire.
- E-verify requirements mandate that you complete an e-verify training course prior to submitting your first request. The e-verify section will guide you to the training course to complete.

- Once the training is passed, when you select e-verify from the 'Things you can do' menu you will be taken into the screen to submit the e-verify request.

Before submitting the e-Verify request to instantaneously verify work authorization status, the Manager is shown all details for confirmation. Once you click submit, you will receive a response within 10-15 seconds



- If the new hire is authorized to work in the U.S., a green check will appear after the manager indicates **Employment Authorized** from the previous screen.



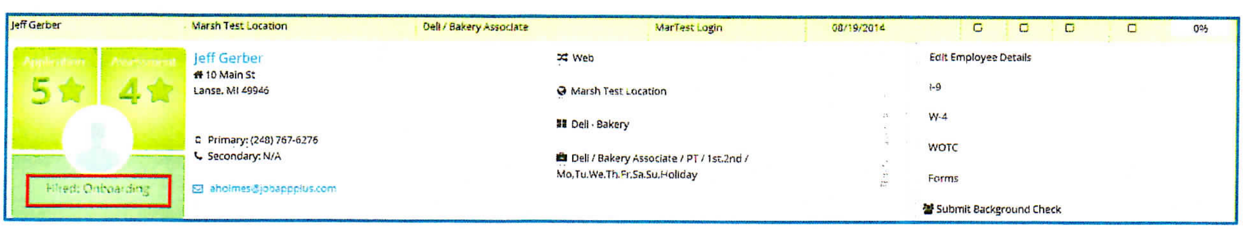
Managers are responsible for submitting the E-verify request. For detailed instructions on managing open cases, refer to the e-verify user guide.

Completing the Process

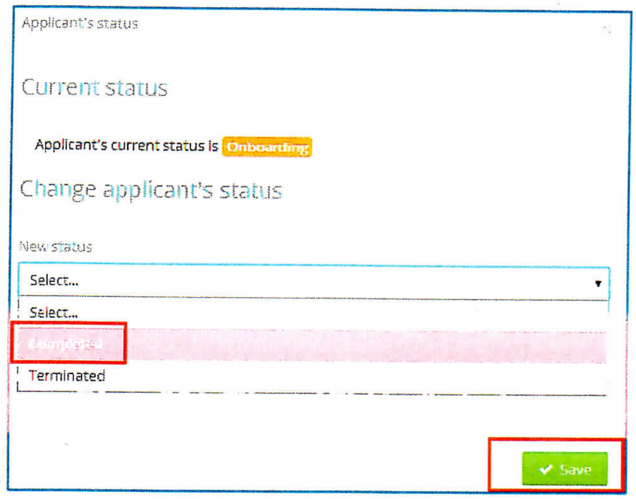
NOTE: Your employee will not be processed for payroll if you do not complete this step.

This is the final step of the onboarding process. You **MUST complete** the process for this new employee in talentReef by:

- Clicking on the employee's status



- Updating the status to **"Completed"**
- Click **Save**



To change a new hire's status to **"Completed"**, you must have check marks under the "E" (Edit Details), I-9, W-4, WOTC and the Forms box must be green and at 100%.

Once the page is refreshed, the employee will be moved under the **Completed** section instead of **Onboarding.**