ADP Onboarding Reference Guide

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Welcome

Welcome to WhiteWater! We are so excited to have you join our team! Today, we will guide you through our onboarding system in ADP and what it will look like to complete your onboarding. To start, we will go through the process of receiving the onboarding email and creating your account. Then, we will go through the process of completing your onboarding packet.

Onboarding Support

Before we get started, should you need any help as you go through the onboarding process, you can refer to the ADP Reference Guide attached to your Welcome Email. You can also contact us anytime via HR Direct, and we will be happy to assist you!

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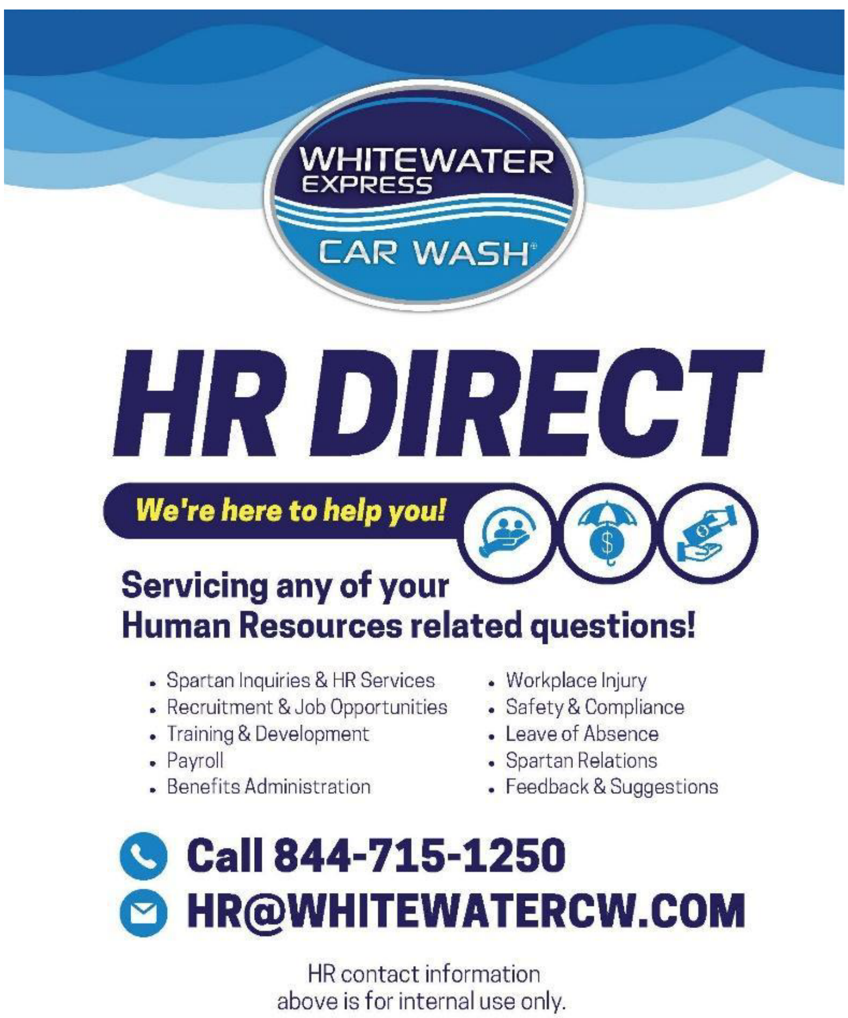
Reference Video Link

PRIVACY.FLOWCODE.COM

HR Direct



Creating Your ADP Account

The first thing we need to do is create an account in ADP. To create your ADP account, you will first need to access your email account, then find and open the email from ADP with the subject "PreHire Email." Then, click the "Self-Service Registration" link, and you will be redirected to the ADP login page. **NOTE:** If you already have an ADP login from a prior employer, you will still need to create a new one for our organization.

Once the login screen appears, click on the "Get Started" link, then click the "I have a registration code" button and enter the registration code found in your welcome email. On the following screens, input your name and check the Associate ID box. Input the Associate ID, also found in your welcome email. Then, add your contact information, create your User ID and password, and accept the terms and conditions. After creating your ID and password and accepting the terms and conditions, click the "Create Your Account" button at the bottom of the page. On the confirmation page, click the "Sign in now" button and log in to your account using your new User ID and password.

Once you have created your account and signed in, you are ready to complete your onboarding packet and the associated tasks. The following steps will guide you through the process of completing your profile. Please follow the instructions carefully and provide accurate information where required.

Completing Your Profile

To start, complete your profile by clicking the "Complete Info" button. A box will appear, and you can fill in the required fields for name and address. You can also add optional information such as a preferred name, mobile number, email address, and demographic information. Next, you may input any information that you want in the sections for sexual orientation, disability, protected veteran, and marital status. Finally, you will need to select your Tax ID type and input your Tax ID number. Generally, your Tax ID number will be your social security number. Next to the box for your Tax ID number is a checkbox that says "Applied For." Ensure that that box is not checked before moving on to your date of birth and optionally selecting your gender. Then, review all the information you have entered and verify it is correct before clicking the "Save" button at the bottom of the page. Finally, click the "Next" button at the bottom right of the screen, and you will be directed to the next section, Your Tasks.

Completing Your Tasks

Once you have completed your profile, it is time to complete your tasks, including employment verification, tax withholding, selecting your payment option, adding emergency contacts, and reviewing and uploading documents. Please follow the instructions carefully and accurately provide information as needed. Now, let's review the steps for completing the onboarding tasks. To start, click on the first task that you would like to complete and begin entering your information and reviewing documents. For this demonstration, we will start with employment verification and work our way down the list.

Employment Verification

To get started, click the "Verify Employment Eligibility" link and input the required information, including your name, address, birth date, email, and phone number. Then click "Next" at the bottom of the page. On the next page, enter your social security number and click "Next." Now, you will select your work authorization and verify that you can provide the necessary documents. On the next page, indicate if you used a preparer or translator. If yes, the preparer or translator will need to complete the bottom section of the page. Click "Next," and a box will appear indicating that sensitive information will be visible on the following screen. Click "OK" and proceed to the next screen, which will show your pre-filled Form I-9. Review the form to ensure all the information is accurate before checking the acknowledgment box. Finally, input your name and the last four digits of your Social Security number, and click the "Submit" button. Once you see the confirmation screen, click the "Back" button at the top left corner of the screen.

Set Up Tax Withholding

Now, we will set up your tax withholding. To start, click the "Set Up Tax Withholding" link. Then, click "Start" under the Federal W-4 section and click "Next." Verify that the information displayed is correct on the following page and click “Next.” After that, indicate if you are a nonresident alien and click “Next.” Then, select your filing/marital status and click “Next” before indicating if you are tax-exempt on the next page, then click “Next.” Your next step will be to indicate if you have multiple jobs or if your spouse works and input how many children or other dependents you want to claim. Once completed, click “Next.” Input any necessary information regarding other income, deductions, and extra withholding, and click “Next.” Lastly, review your pre-filled W-4 form, click the acknowledgment box at the bottom of the page, then click “Done.” **NOTE:** If your state has a state income tax, you must click the “Start” button under the State W-4 section and repeat steps 3-11 for the State W-4.

Select Payment Options

Now, we are going to review the steps for payment options. To begin, click the “Select Payment Options” link. Next, click the “Add bank account” button in the Bank Account Direct Deposit box. Then, add your routing number to the required fields and click “Next.” After that, you will add your account number to the required fields and click “Next.” Then, add your account type to the required fields and click “Next.” Review your information, verify its accuracy, and click “Done.” Finally, click the “Back” button at the top of the page.

Add Emergency Contacts

To create your emergency contacts, click on the “Emergency Contacts” link. Once the box appears, click the “Add Contact” button. Now, input your emergency contact's full name and relationship and check the box indicating that this is your primary contact. Next, select the phone number type and input the emergency contact’s phone number. If you need to add another phone number for your emergency contact, click the “Add Phone” button. Then, click “Save” at the bottom of the page. If you would like to add additional emergency contacts, you can do so by clicking the “Save & Add Another Contact” button and repeating these steps. Lastly, click the “Back” button at the top of the page.

Review Documents

To review your documents, click the “Review Documents” link and select the first document in the list. Read and complete the document and click the “Submit” button at the bottom of the page. Once the confirmation screen appears, click the “Back” button at the top left corner of the screen. Go to the next document on the list and repeat the process for each remaining document. Once all documents have been reviewed, click the “Back” button at the top of the page.

Upload Documents

In the Upload Documents task, you will upload various documents, including the items needed for the system to complete your employment verification. To begin, click on the “Upload Documents” link. Click on the first document, and a box will appear for you to add the requested files. Add the requested file by either uploading the file by clicking on “Select File” or you can drag and drop the file into the box. Once the file has been added, click the “Upload” button at the bottom of the page. Repeat this process for each requested document on the list. Once all documents have been uploaded, click the “Back” button at the top of the page.

STEP-BY-STEP PROCEDURES

Creating Your ADP Account (Step-by-Step)

To create your ADP account, perform the following steps:

1. Access your email account
2. Find and open the email from ADP with the subject “PreHire Email”
3. Click the “Self-Service Registration” link, and you will be redirected to the ADP login page
    - If you already have an ADP login from prior employment, you will still need to create a new one for our organization
4. On the login screen, click on the “Get Started” link
5. Click the “I have a registration code” button
6. Enter the registration code found in your welcome email
7. Input your name and check the box for Associate ID
8. Input the Associate ID found in your welcome email
9. Add your contact information
10. Create your User ID and password
11. Accept the terms and conditions
12. Click the “Create Your Account” button at the bottom of the page
13. On the confirmation page, click the “Sign in now” button
14. Login to your account using your new User ID and password

Completing Your Profile (Step-by-Step)

After creating your ADP account, you will see the first page of your onboarding.

1. Click the “Complete Info” button
2. Complete the required name fields
3. Input an alternate or preferred name, if applicable
4. Input your legal address information in the applicable fields
5. Input optional information as desired
    - Mobile Number
    - Email Address
    - Demographic Information
6. Input information into optional remaining sections
    - Sexual Orientation
    - Disability
    - Protected Veteran
    - Marital Status
7. Input your tax information
    - Tax ID type
    - Tax ID number (usually your Social Security number)
        - Do not select the “Applied For” box
    - Date of birth
    - Gender (optional)
8. Review all the information you have entered and verify it is correct
9. Click the “Save” button at the bottom of the page
10. On the main page, click the “Next” button at the bottom right of the screen

Completing Your Tasks (Step-by-Step)

1. Select the “Your Tasks” tab from the menu on the left side of the screen
2. Click on the task you wish to complete
   - Ensure you complete all tasks on or before their respective due dates.
3. Complete all onboarding tasks

Employment Verification (Step-by-Step)

1. Click the “Verify Employment Eligibility” link
2. Input the required information
   - Name
   - Address
   - Birth Date
   - Email
   - Phone Number
3. Click “Next” at the bottom of the page
4. Enter your social security number
5. Click “Next” at the bottom of the page
6. Indicate your work authorization by clicking the appropriate option
7. Select “Yes” when asked if you can provide documentation
8. Click “Next” at the bottom of the page
9. Indicate if you used a preparer/translator to help you complete the form
   - If you select “Yes,” the preparer/translator will need to complete the section that appears
10. Click “Next” at the bottom of the page
11. A box will appear indicating that sensitive information will be visible on the following screen
12. Click “OK” at the bottom of the box.
13. Review the pre-filled Form I-9 to ensure the accuracy of the information
14. Once confirmed, check the acknowledgment box
15. Input your first name, last name, date of birth, and zip code
    - The information must match the information on the Form I-9
16. Click “Submit” at the bottom of the page
17. Once the confirmation screen appears, click the “Back” button at the top left corner of the screen

Set Up Tax Withholding (Step-by-Step)

1. Click the “Set Up Tax Withholding” link
2. Click the “Start” button under the Federal W-4 section
3. Click “Next”
4. Verify the information on the screen is correct, click “Next”
5. Indicate if you are a nonresident alien, click “Next”
6. Select your filing/marital status, click “Next”
7. Indicate if you are tax-exempt, click “Next”
8. Indicate if you have multiple jobs or if your spouse works
9. Input how many children or other dependents you want to claim, click “Next”
10. Input any necessary information for other income, deductions, and extra withholding, click “Next”
11. Review your pre-filled W-4 form, click the acknowledgment box at the bottom of the page, click “Done”

NOTE: If your state has a state income tax, you will need to click the “Start” button under the State W-4 section and repeat steps 3-11 for the State W-4.

Select Payment Options (Step-by-Step)

1. Click the “Select Payment Options” link
2. Click the “Add bank account” button in the Bank Account Direct Deposit box
3. Add your routing number to the required fields and click “Next”
4. Add your account number to the required fields and click “Next”
5. Add your account type to the required fields and click “Next”
6. Review your information, verify its accuracy, and click “Done”
7. Click the “Back” button at the top of the page

Add Emergency Contacts (Step-by-Step)

1. Click the “Emergency Contacts” link
2. Click the “Add Contact” button
3. Input the Full Name and Relationship of your emergency contact
4. Check the box indicating that this is your primary contact
5. Select the phone number type
6. Input the emergency contact’s phone number
    - If you need to add another phone number for your emergency contact, click on the “Add Phone” button
7. Click “Save” at the bottom of the page
    - If you would like to add additional emergency contacts, click on the “Save & Add Another Contact” button and repeat steps 3-7
8. Click the “Back” button at the top of the page

Review Documents (Step-by-Step)

1. Click the “Review Documents” link
2. Click the first document
3. Read and complete the document
4. Click the “Submit” button at the bottom of the page
5. Once the confirmation screen appears, click the “Back” button at the top left corner of the screen
6. Repeat steps 3-5 for all remaining documents
7. Once all documents have been reviewed, click the “Back” button at the top of the page

Upload Documents (Step-by-Step)

1. Click the “Upload Documents” link
2. Click the first document, and a box will appear
3. Upload the requested file
    - You can either upload the file by clicking on “Select File,” or you can drag and drop the file into the box
4. Click the “Upload” button at the bottom of the page
5. Repeat steps 3-5 for all remaining documents
6. Once all documents have been uploaded, click the “Back” button at the top of the page