

Client Training HQ

I-9 HQ: Using QuickStart Links

What is a QuickStart Link?

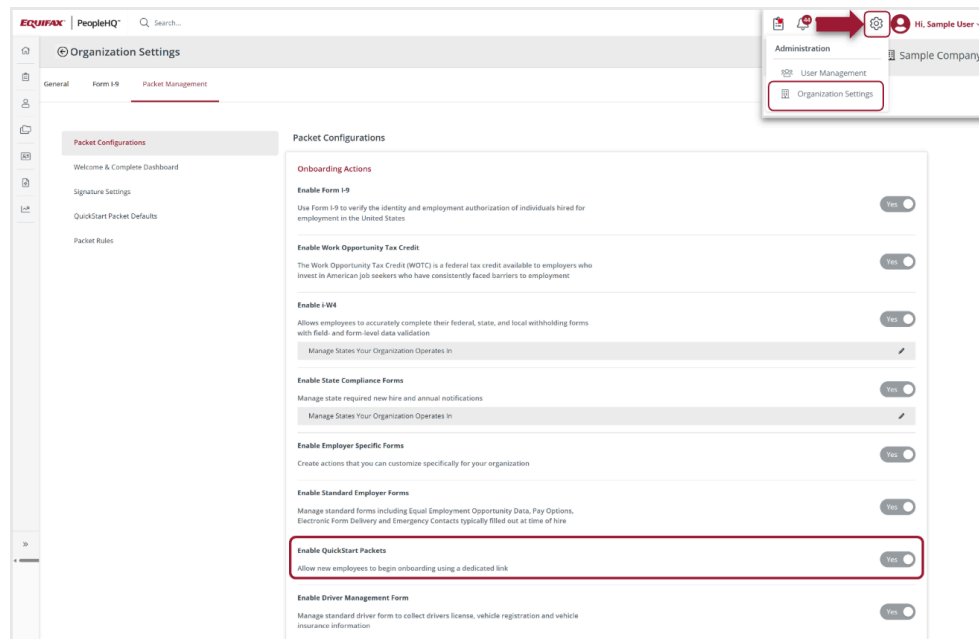
QuickStart links are web address URLs generated by HR Administrators for use in quickly sending an onboarding packet to an employee. Once generated, the link can be copied and pasted into communication directing the employee to begin their onboarding packet.

Enabling QuickStart Links

QuickStart links must be enabled at the organization level, and additional packet configuration settings should be set prior to accessing and using QuickStart links.

Organization Settings - Packet Configurations

To check to see if your organization has QuickStart Packets enabled for Onboarding, click the **gear icon** in the top toolbar and select **Organization Settings**. Under the **Packet Management** tab, review the Packet Configurations for Onboarding Actions. If **Enable QuickStart Packets** is toggled off, contact your Account Executive or Workforce Solutions Support to enable this feature.



Images are examples and for information purposes only. They may vary across platforms and are subject to change.

Organization Settings - QuickStart Packet Defaults

There are three **Data Display** settings to review in the Packet Management organization settings tab. Click QuickStart Packet Defaults to view or manage these QuickStart Rules settings.

The screenshot shows the 'Organization Settings' page in PeopleHQ, specifically the 'QuickStart Packet Defaults' tab. The left sidebar lists 'General', 'Form I-9', and 'Packet Management'. Under 'Packet Management', there are links for 'Packet Configurations', 'Welcome & Complete Dashboard', 'Signature Settings', 'QuickStart Packet Defaults' (which is highlighted), and 'Packet Rules'. The main content area is titled 'QuickStart Rules' and contains three numbered settings under the 'Data Display' section:

- 1 Request Work Start Date**: Ask employees to provide their work start date in onboarding packets. The status is 'Required (Employee must enter work start date)'. A pencil icon is visible for editing.
- 2 Request Work Location**: Ask employees to provide their work location in onboarding packets. The status is 'Required'. A pencil icon is visible for editing.
- 3 Allow Employees To Indicate Remote Work Status**: Enabling this feature overrides the state value from the Work Location with the Work State value from their personal residence. The toggle is set to 'Yes'.

Below these settings is a section for 'Work Location Instructional Text' with the text 'Show Employees Instructional Text When Selecting A Work Location' and a toggle set to 'No'.

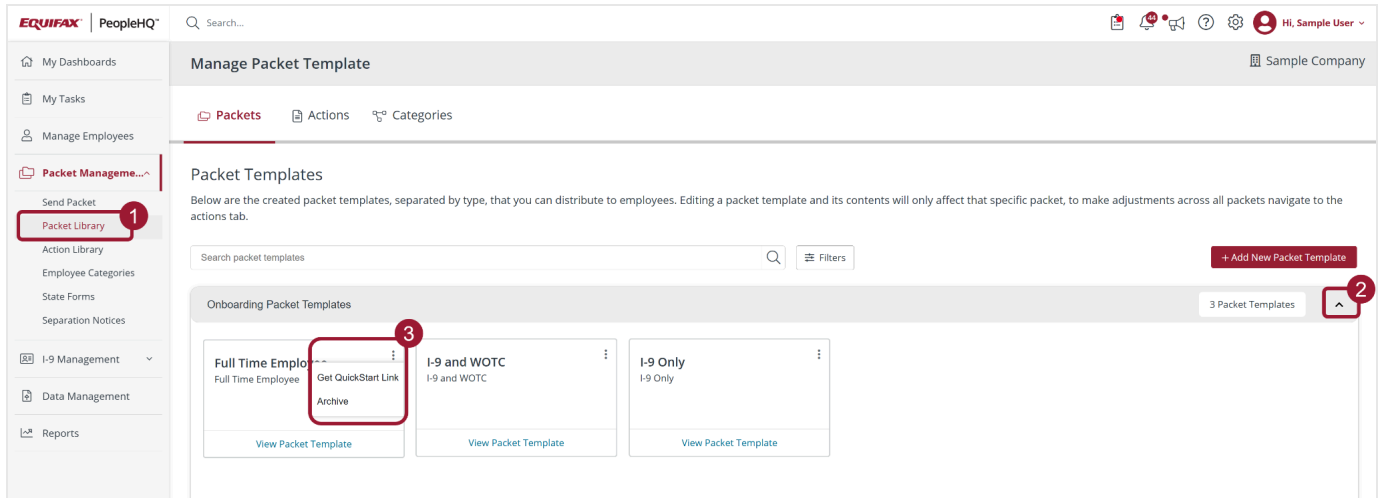
- 1. Request Work Start Date** - Click the pencil icon to set the preference for requesting the employee to enter their work start date.
 - Select **Required** if the employee will be required to enter their work start date.
 - Select **Optional** if the employee will be asked to enter their work start date, but have the ability to skip entering the date. When Optional is selected, indicate a default start date to be a certain number of days after the packet is created, or select the packet creation date.
 - Select **Hidden** if the employee should not be asked to enter their work start date.
- 2. Request Work Location** - Click the pencil icon to set the preference for requesting the employee to enter their work location.
 - Select **Required** if the employee will be required to enter their work location.
 - Select **Optional** if the employee will be asked to enter their work location, but have the ability to skip entering the location.
 - Select **Hidden** if the employee should not be asked to enter their work location.
- 3. Allow Employees to Indicate Remote Work Status** - Set this to **Yes** if the employee's personal residence state should override the work state of the location assigned.

Additionally, **Work Locations Instructional Text** may be set to **Yes** to provide custom guidance to employees on the landing page before they select their work location. A text editing window is displayed to enter supplemental instructions. Click the **Save** button to save your changes.

Generating QuickStart Links

QuickStart links can be generated within I-9 HQ™:

1. Click **Packet Management** in the left navigation menu, then select **Packet Library**.
2. Click the caret in the **Onboarding Packet Templates** header to show the tiles.
3. Click the vertical ellipses on the desired packet template tile, then click **Get QuickStart Link**.



Workflow Steps to Generate a QuickStart Link

There are three steps to generate a QuickStart Link.

Step 1: Select the **Employee Category** from the drop-down list available. Select the checkbox if the employee will be allowed to indicate they work remotely. Click the **Next Step** button to proceed.

Packet QuickStart Link

Step 1 of 3

The packet link will be generated based on the selected employee category and its assigned actions within the packet.

Employee Category

Full Time

☒ Allow employees to work remotely.
This will let them use their home address instead of work address for state compliance forms.

Cancel

Next Step

Step 2: Select a location from the drop-down options available to send a packet to the employee assigned to a specific work location, or select the Generic Packet link option instead for use by any new hire regardless of their assigned work location. Click the **Continue** button. On the next screen, indicate the Section 2 completion method that will be used, then click the **Next Step** button.

Note: Be sure to select an E-Verify Hiring Site location if virtual competition methods for completing Section 2 will be used.

Packet QuickStart Link

Step 2 of 3

To generate a QuickStart packet, you must choose between a global or location-specific option. The system will automatically apply location preferences if selected.

☒ Location Specific Packet Link

This is often used if the packet is created for a specific location within the business.

Default

☐ Generic Packet Link

This link can be used for any new hire, regardless of their work location.

Back

Continue

Packet QuickStart Link

Step 2 of 3

Form I-9 Options

Select how you want your employee to complete Section 2 of their Form I-9.

I-9 Anywhere®

Outsource your Section 2 completions to a trusted I-9 partner.

☐ Completed Virtually

☒ Most Convenient

☐ Completed at a Nearby Location

Your HR Department

Someone in your HR Department completes Section 2.

☐ Review Documentation Virtually

☐ Review Documentation in Office

Back

Next Step

Step 3: The QuickStart link is now generated. Options for using the QuickStart link are located below the displayed URL web address. Simply click the **Copy Link** option to copy the URL web address to the device's clipboard, then paste it into the communication sent to the employee.

Packet QuickStart Link

Step 3 of 3

Successfully generated the QuickStart packet link.

To make any adjustments, you can go back and generate another link.

Packet Template:

Full Time Employee

Category:

Full Time

Section 2 Method:

I-9 Anywhere

Work Location:

Default

Allow Remote Employees:

Yes

Location Specific Packet Link

This allows the employee to skip their Work Location step.

url link will display here

Copy Link

Access QR Code

Change Link

Go Back

Close Window

4

Click the **Access QR Code** option to download a QR code for the employee to scan with a mobile device camera to access the web address URL.

Packet QuickStart Link



Choose a file type to download

☒ PNG

☐ JPEG

☐ PDF

Back

Download

The **Change Link** option allows you to generate a new web address URL for the selected criteria if needed.

Note: When a new link is generated, the previous link may become obsolete. While this may be beneficial in some cases (i.e. to conclude traffic after hiring events), links that were sent but never accessed by the employee will no longer be accessible. Employees who started their packet may still access and complete their in-progress packets.

When finished, click the Close Window button to exit the QuickStart Link generation process.

More Training Available!

Check out additional training resources available on our site, [Connections](#).

The information provided is intended as general guidance and is not intended to convey any tax, benefits, or legal advice. For information pertaining to your company and its specific facts and needs, please consult your own tax advisor or legal counsel.