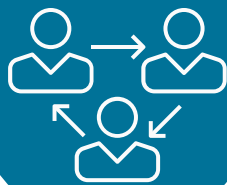




Workforce
Solutions

HR BEST PRACTICES

Onboarding



HR Best Practices

Helping Improve the Onboarding Experience

The onboarding process varies greatly between organizations and many are still working towards finding the best way to make the process as smooth and efficient as possible. [The bad news](#) is only 12% of employees strongly agree their organization is doing a great job of onboarding, and almost 20% of new hires either report their onboarding experience was poor, or that they had no onboarding at all (yikes). Clearly, there is room for improvement.

Now, for the good news. An effective onboarding experience can help retain [69% of employees](#) for up to three years which means the stakes are high. You are likely already in a war for talent, and getting started off on the right foot is essential to onboarding and hanging on to your new hires. While the initial paperwork is only one small piece of the onboarding process, it's in your best interest to make it as smooth and quick as possible. Any frustration or delays may mean they move on to the next offer.



Ways to Improve Your Onboarding Process

There are other ways you can improve your onboarding progress such as looking at technology, building in APIs to get better results, and making sure the order of your onboarding process is focused on the best employee experience possible while trying to muddle through all of the required paperwork.

User-Friendly Employee Onboarding Software

Technology should be your friend when developing or refining your onboarding process. For large organizations, the use of employee onboarding software to create automated workflow systems can lead to a more effective and efficient experience for both the new hire and HR team. Your new hire expects a consumer-like experience with mobile friendly apps accessible 24/7 from any device with minimal starts and stops or exits to other programs. An integration with your onboarding system utilizing Application Programming Interfaces (APIs) can help you get there. By pulling data from your applicant tracking system into onboarding packets, they can help streamline some of your processes and built-in rules to help reduce errors and save time.



Benefits of an API Integration



Streamlines employee experience

New hires can complete paperwork quicker and more accurately from their home, the office, or a mobile device. The employee doesn't need to sign into multiple systems to access forms like the I-9. Instead, it can be part of one easier and faster workflow that can be completed quickly so you don't lose them.



Makes implementation easier

The API is pre-built and ready for integration, which means there is minimal to no IT development resources needed and you can get started quickly.



Supports HR workload reduction

You can access the information you need within your Human Resource Information System (HRIS), a system you probably use every day, helping save you time and unnecessary extra steps. Information is current because it is in real time.



Helps improve security

The more seamless transfer of information means you aren't managing separate files, which can reduce your exposure to some types of data risk.

Efficiently Helping Check the Regulatory Boxes

While not necessarily fun to fill out, federal and state forms have strict timing requirements, and failure to comply may lead to fines. One of the best things your onboarding process can do is help get them completed quickly and more accurately so that you get the information you need to help fulfill the requirements.



Time Requirements

- Section 1 must be completed on or before the first day of work
- Section 2 within 3 days of the start date

Challenges

- Completing the forms on time
- No one located near the new hire to verify paperwork
- Errors in form completion (First name/last name switched, incorrect citizenship indicated, etc.)

Best Practices

- Timing alerts sent to the new hire and the HR team
- Outsource Section 2 completion to a vendor with a network trained completers, either nationwide or virtual
- Form fields with built in logic

Form W4

- Should be completed before paying an employee

- Keeping up with new and revised federal and state forms
- You can't get the new hire set up in payroll without it

- Avoid many types of calculation errors with built in logic
- Integrate the form with your payroll (or HCM) system if possible to help avoid keying errors

State Forms (Disclosures etc.)

- In many cases, must be presented to a new hire on their first day of work or sooner

- Requirements change frequently with state legislation
- New hires may live in states where you aren't familiar with the requirements

- Either assign an HR employee, a member of your legal team, or work with a vendor to track legislation where your new hires live
- Review at least once a quarter

HIDDEN BENEFIT: Contributing to the Bottom Line

The onboarding process can have implications through the organization and there may be a way for it to prove even more valuable. The [Work Opportunity Tax Credit \(WOTC\)](#) was extended until December 31, 2025 which means you still have time to take advantage of this program. You may have been missing out on thousands of dollars that could drop straight to your bottom line, further proving your value to the organization.



What is WOTC?

- A federal tax credit available to employers who hire and retain employees from [certain targeted demographic groups](#) that typically have challenges gaining employment.
- Employers can receive a federal tax credit up to \$9,600 per eligible employee.
- Aimed at helping people find jobs and encouraging employers to give them a chance, employers who screen for WOTC claim about [\\$1 billion](#) in tax credits each year, according to the Department of Labor (DOL).
- An average of 20-30%* of an employer's employee base may qualify for WOTC tax credits

* Equifax client data, 2020-2021



WOTC Best Practices

- Since the WOTC screen form must be filled out by the candidate, presenting the form at many points in the screening and hiring process can help improve the possibility of the candidate completing it. Therefore your company has an increased chance of identifying eligible candidates.
- If your hiring process is a long one, have your new hires fill it out again if 30 days have passed since it was last completed since eligibility may have changed.
- Work with an experienced WOTC provider who can present the screening form and apply for the certification on your behalf.

If you do not currently have a WOTC screening program, check out our [WOTC calculator](#) to see how much money one could potentially help save your company.

PRO TIP:

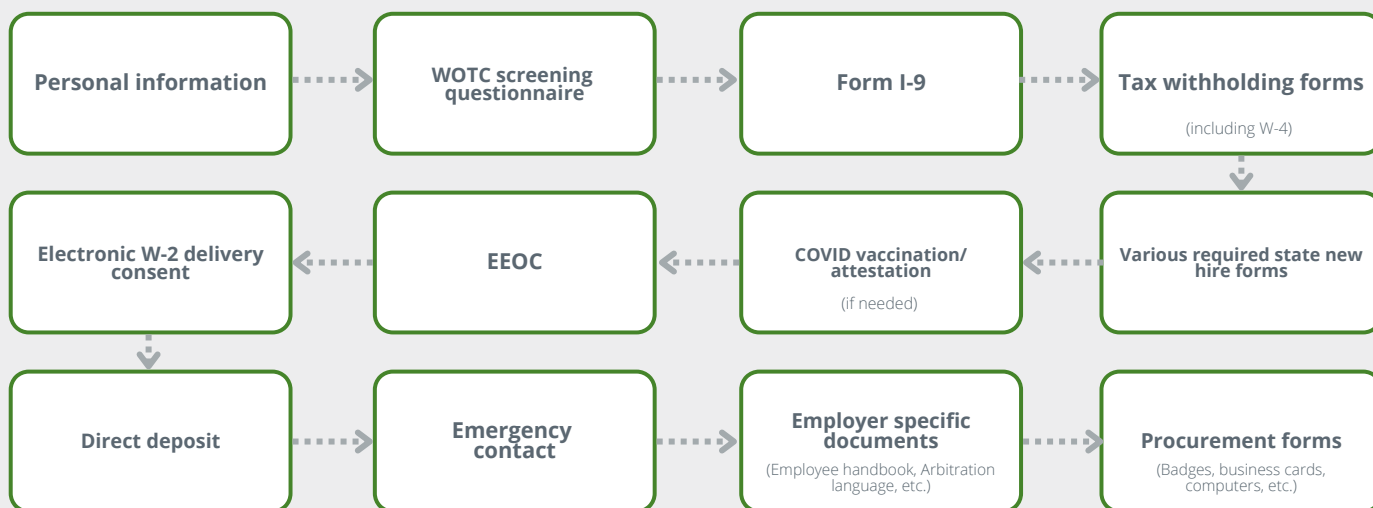
To help improve the possibility of having the WOTC screening questionnaire completed, try presenting it before the required Form I-9. As both WOTC and I-9 workflows have similar timing requirements, combining completion of the federally mandated Form I-9 with WOTC screening provides applicants the opportunity to voluntarily screen for available tax credits. By strategically including the required Form I-9 in the same packet and requiring that applicants advance through the WOTC Form 8850 before completing the Form I-9, it may increase the likelihood that it is completed.

Order Matters

TAs demonstrated above, there is a strategy to the order of onboarding paperwork. Positioning the most important forms early in the process, especially those with specific time requirements. We recommend ending with those that should only be completed once you are more certain the employee will actually begin work, such as the handbook and providing access to company assets and networks.



Suggested Onboarding Order



Beware of Audit or Complaint Risk

Lack of good process and procedures could be a catalyst to facing fines or attracting litigation and/or an audit. You could have a disgruntled current or former employee that may know that the HR forms processes or procedures you have in place really may not be adequate. If so motivated, they could begin to file complaints against you based on that information.

A clear and consistent onboarding forms process can make the management of documents much easier for you and the employee. The right automated forms platform can give you the ability to provide the forms and information you wish to your new hires or employees in one packet. This information can be delivered to them either via email and/or via text when permitted, which will help you document that the notices were presented to the employee and acknowledged. Having documentation of all your forms procedures and acknowledgement of these procedures by all applicable personnel is a good practice to help ensure consistency within your organization.

Moving Target

Onboarding isn't a "set it and forget it" process. Technology and legislation are constantly changing, not to mention the shifts within your own organization.

- Develop your onboarding flow for today's needs, but revisit it at least twice a year as a best practice.
- Be sure to look at where you might have significant abandonment rates so you can pinpoint areas that may need tweaking.
- Designate a team member or a provider to help you keep track of changing federal and state forms to help identify changes so you can better minimize your regulatory risk.



Help Streamline Your Forms Process

Organizations with a strong onboarding process help to improve new hire retention [by 82%](#) and [productivity by over 70%](#).

It is beneficial that employees have a positive experience throughout the entire employee lifecycle from hire to retire. Having one process in place that employees are used to throughout their lifecycle can really help make sure that they are completing the forms and that they are going through the workflows in an expedited manner because they're not questioning where it's coming from.

Whether you have employees working remotely, in the office, or on hybrid schedules, automation can help you more consistently and properly manage your HR processes with less effort, while also helping you mitigate your potential risk. A forms management solution for onboarding, annual notices, offboarding, and state required forms can help you alleviate that manual burden.

[Forms HQ](#) can help you transform your HR forms management process throughout the entire employee lifecycle - helping you to deliver your right forms, to the right person, at the right time.



[Watch this short video](#) to see it in action.

And to learn more about Forms HQ and how to get started, [click here](#).



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