



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 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.



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.

Help with Checking 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 the new hire doesn't have to see them again, and you get the information you need to help fulfill the requirements.



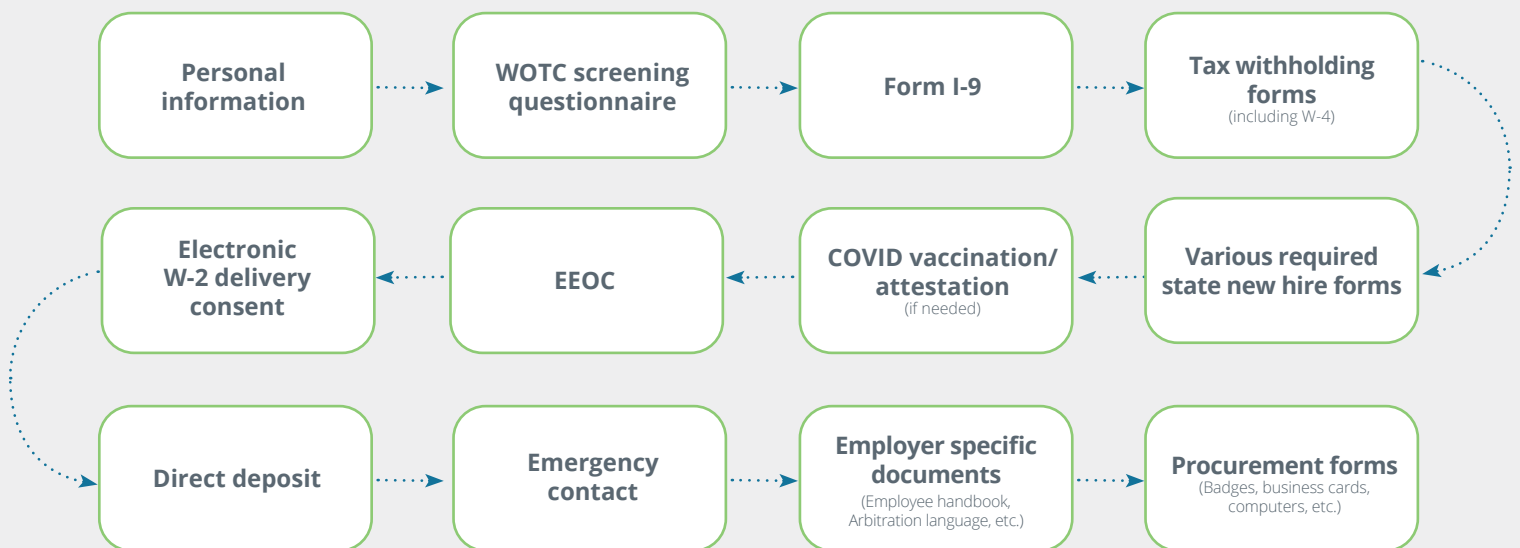
	Form I-9	Form W-4	State Forms (Disclosures etc.)
Time Requirements	<ul style="list-style-type: none"> Section 1 must be completed on or before the first day of work Section 2 within 3 days of the start date 	<ul style="list-style-type: none"> Should be completed before paying an employee 	<ul style="list-style-type: none"> In many cases, must be presented to a new hire on their first day of work or sooner
Challenges	<ul style="list-style-type: none"> 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) 	<ul style="list-style-type: none"> Keeping up with new and revised federal and state forms You can't get the new hire set up in payroll without it 	<ul style="list-style-type: none"> Requirements change frequently with state legislation New hires may live in states where you aren't familiar with the requirements
Best Practices	<ul style="list-style-type: none"> Timing alerts sent to the new hire and the HR team Work with a vendor with nationwide verification locations Form fields with built in logic 	<ul style="list-style-type: none"> 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 	<ul style="list-style-type: none"> 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

Order Matters

There is a strategy to the order of onboarding paperwork, and we suggest the most important forms come first, especially those with time requirements as discussed previously. 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



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) has been extended until December 31, 2025 which means you 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**.
- Since long term unemployed workers are eligible, many workers displaced during the pandemic may now qualify.



WOTC Best Practices

- Since the WOTC screening form must be filled out by the candidate, presenting the form at many points in the hiring process can help improve the possibility of having it completed. Therefore your company has an increased chance of identifying eligible candidates.
- If your hiring process is a long one, have your applicants 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.

PRO TIP:

Equifax data shows your best chance to get the WOTC screening questionnaire completed is when it is presented before the required Form I-9.

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.

If your organization needs help with aspects of your [onboarding](#), reach out to our subject matter experts from Equifax Workforce Solutions. For even more insights, subscribe to [The Workforce Wise™](#) blog for updates, best practices, and tips you can use to enhance your onboarding process.



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to help automate your
onboarding experience.

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