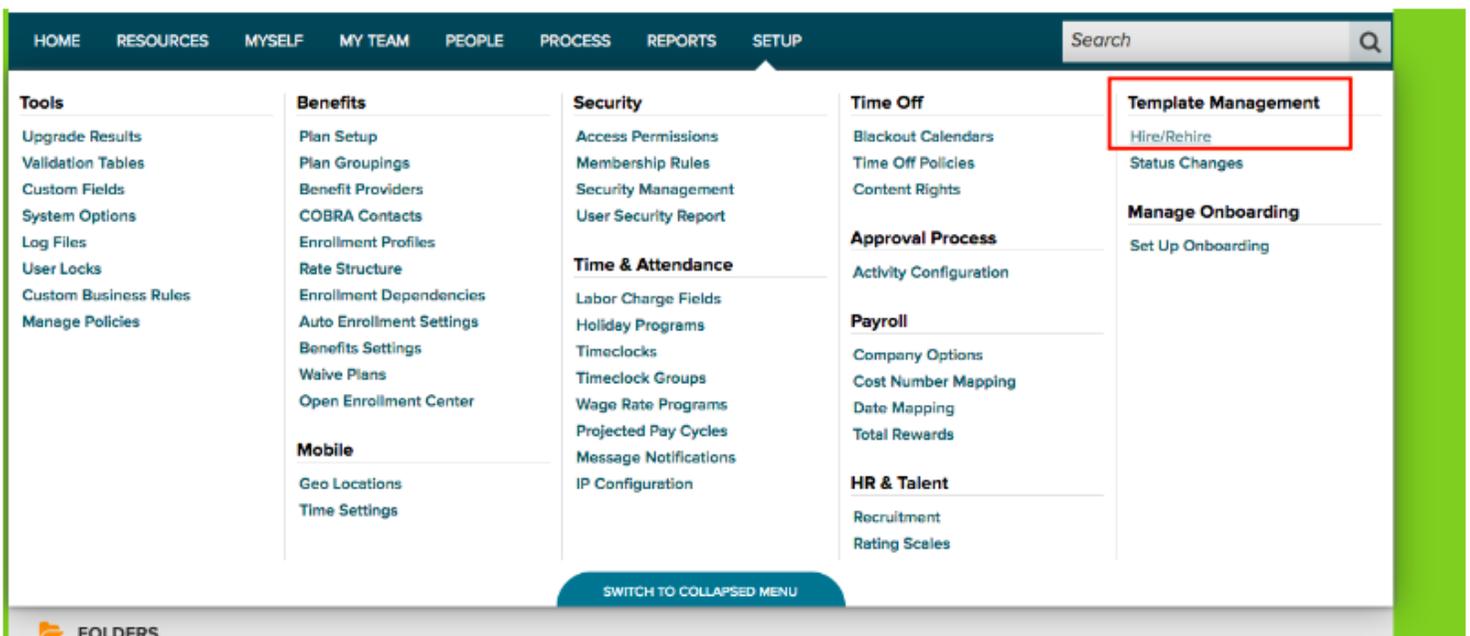


ADP Bi-Directional: Configure New Hire Template in ADP

Below are step-by-step instructions on how to activate/edit the new hire template in a client's ADP TotalSource account. Clients can send new hires into a single New Hire Template. This template can be any ADP-System or a Custom New Hire Template.

Once this configuration has been completed, please email the ClearCompany Representative you are working with the name of the New Hire Template.

1. Choose which new hire template ClearCompany will send new hire data to.
2. Edit the template in question.
 - a. Go to setup, then select Hire/Rehire



The screenshot shows the ADP TotalSource Setup menu. The 'SETUP' tab is selected in the top navigation bar. The 'Template Management' section is highlighted with a red box and contains the following items:

- Hire/Rehire
- Status Changes

Other sections visible in the menu include:

- Tools:** Upgrade Results, Validation Tables, Custom Fields, System Options, Log Files, User Locks, Custom Business Rules, Manage Policies
- Benefits:** Plan Setup, Plan Groupings, Benefit Providers, COBRA Contacts, Enrollment Profiles, Rate Structure, Enrollment Dependencies, Auto Enrollment Settings, Benefits Settings, Waive Plans, Open Enrollment Center
- Mobile:** Geo Locations, Time Settings
- Security:** Access Permissions, Membership Rules, Security Management, User Security Report
- Time & Attendance:** Labor Charge Fields, Holiday Programs, Timeclocks, Timeclock Groups, Wage Rate Programs, Projected Pay Cycles, Message Notifications, IP Configuration
- Time Off:** Blackout Calendars, Time Off Policies, Content Rights
- Approval Process:** Activity Configuration
- Payroll:** Company Options, Cost Number Mapping, Date Mapping, Total Rewards
- HR & Talent:** Recruitment, Rating Scales

A 'SWITCH TO COLLAPSED MENU' button is located at the bottom of the menu.

- b. Ensure the desired template is set to **Yes** in the **Activated?** column

Hire/Rehire ? ↗

New Hire Templates

✔ Your changes have been saved.

Manage New Hire Templates

ADP provides standard New Hire templates. You can copy standard templates and edit them as needed, or create custom templates to reflect your new hire process.

ADD | DELETE | COPY

TEMPLATE NAME	COUNTRY	ACTIVATED?	CREATION DATE
<input type="checkbox"/> HR Only (System)	US	<input checked="" type="radio"/> Yes <input type="radio"/> No	7/3/2013
<input type="checkbox"/> International (System)	Internatio...	<input checked="" type="radio"/> Yes <input type="radio"/> No	7/3/2013
<input type="checkbox"/> International Employees	Internatio...	<input checked="" type="radio"/> Yes <input type="radio"/> No	9/19/2013
<input type="checkbox"/> PR + HR + Time	US	<input checked="" type="radio"/> Yes <input type="radio"/> No	8/31/2016
<input type="checkbox"/> Salaried Office Employees	US	<input checked="" type="radio"/> Yes <input type="radio"/> No	5/2/2017
<input type="checkbox"/> Temporary Workers	US	<input checked="" type="radio"/> Yes <input type="radio"/> No	5/2/2017
<input type="checkbox"/> Test Template	US	<input checked="" type="radio"/> Yes <input type="radio"/> No	9/26/2018
<input type="checkbox"/> Warehouse Employees	US	<input checked="" type="radio"/> Yes <input type="radio"/> No	5/2/2017

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c. If the template is one of the below, no additional action is needed.

- i. HR + Payroll (System) - US
- ii. HR + Payroll + Time (System) - US
- iii. HR + Time (System) - US
- iv. HR Only (System) - US

d. If the template is not a system template:

- i. Click on the template name to open it in edit mode
- ii. Select **Name Template**
 1. Rename the template to "Applicant Onboard"
 2. Confirm all other questions are correctly answered on this screen
 3. Click Next



Hire/Rehire ? ↗

- Name Template
- Select Steps
- Select Fields
- Order Steps
- Assign Users
- Set Notifications
- Confirm Selections ✔

Name the New Hire template and answer the following questions to customize the workflow.

Template Name*

Where will employees hired with this template work?

How will employees hired with this template be paid?
 ADP Workforce Now Payroll
 Other Payroll Provider

Will employees hired with this template track time through ADP Workforce Now Time & Attendance?
 Yes
 No

How many people will enter new hire information?
 One person
 Two or more people

Do you want to require final approval for new hires created with this template?
 Yes, require approval
 No, do not require approval

e. Add and remove the appropriate steps to your template

- Make sure the following steps are selected:
 - Personal
 - Employment
 - Payroll
- Optionally, add:
 - Custom Fields
 - Time Off
 - Other steps that may be unique to your ADP account
- Remove** Emergency Contacts & Direct Deposit
 - If either of these is selected, remove them by selecting that field and clicking the < icon **Please note, these values will send over automatically from ClearCompany once the new hire is complete in ADP**



Hire/Rehire ? ↗

Name Template

Select Steps

Select Fields

Order Steps

Assign Users

Set Notifications

Confirm Selections

Template Name: Applicant Onboard12

Select the steps you want to include in the template. Each step is a different type of information. Steps marked with an * are required.

i All Federal contractors and sub-contractors subject to VEVRAA and Section 503 must include the Protected Veteran Status step in the new hire template, as well as the Section 503 Disability Status fields that are part of the Personal Information step.

Available Steps

Emergency Contacts

Performance Review

Selected Steps

Personal*

Employment*

Time & Attendance*

Custom Fields

Time off

Payroll

Payroll Fields

• Pay Frequency

• Rate Type

• Rate 2 Amount

• Regular Pay Rate

• Standard Hours

• Tipped Employee

- iv. Click Next
- v. Decide what fields you'd like to turn Off, make Optional, or Required
 1. All of the data points coming from ClearCompany need to be selected as either Optional or Required
 - a. To see the standard list of fields that ClearCompany will send for a new hire, click here.
 2. In addition, please make the following fields required
 - a. Work Email
 - b. Home Email



Hire/Rehire ? ↗

- Name Template
- Select Steps
- Select Fields
- Order Steps ✓
- Assign Users
- Set Notifications
- Confirm Selections ✓

Template Name: International Employees

Click **show** to view a list of fields in each step. System required fields must be included in all templates. You can exclude other fields or make data entry in them optional or required.

PERSONAL	HIDE		
Field Name	off	optional	required
Worked In Country			System Required
Hire Date			System Required
Reason for Hire ?			System Required
Company Code	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Associate ID ?			System Required
Tax ID ?	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Salutation ?	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
First Name			System Required
Middle Name	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Last Name			System Required
Generation Suffix ?	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Professional Suffix ?	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Preferred Name	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>

CANCEL **PREVIOUS** **NEXT** **DONE**

- vi. Click Next
- vii. Set the Order of the Steps
 1. You can click the up and down arrows to move each section



Hire/Rehire ? ↗

- Name Template ✓
- Select Steps ✓
- Select Fields ✓
- Order Steps
- Assign Users
- Set Notifications
- Confirm Selections

Template Name: Applicant Onboard12

You can change the order in which information is entered when hiring an employee. **Drag and drop** steps to change the order of hiring an employee or click ↕ or ↕ next to a step to move the step up or down. Fields marked with an * are required.

1 - PERSONAL(MUST ALWAYS BE FIRST)			HIDE
• Worked In Country *	• Tax ID Type	• Gender *	
• Hire Date *	• Applied For	• Birth Date *	
• Reason for Hire *	• Tax ID	• Home Phone	
• Associate ID *	• First Name *	• Tobacco User	
• Company Code	• Last Name *		
2 - EMPLOYMENT			SHOW
3 - PAYROLL			SHOW
4 - TIME & ATTENDANCE			SHOW
5 - CUSTOM FIELDS			SHOW
6 - TIME OFF			SHOW

CANCEL

PREVIOUS

NEXT

DONE

- Click Next
- Select the profile(s) of user(s) who can enter information for the steps in this template
 - Select **Profile for system users established by marketplace data connector applications**
 - Select any other profiles you want to be able to view the new hire template



Hire/Rehire ? ↗

Name Template

Select Steps

Select Fields

Order Steps

Assign Users

Set Notifications

Confirm Selections ✓

Template Name: Applicant Onboard

Select the profile(s) of user(s) who can enter information for the steps in this template. If you plan to enter new hire information, be sure to select your profile. Any user in a profile can enter information for the assigned step(s).

ALL STEPS - ASSIGN PROFILE(S)

All new hire information will be entered by a user in the profile(s):

VIEW USERS IN SELECTED PROFILES ▼

- Practitioner A
- Practitioner B
- Practitioner
- Profile for system users established by Marketplace Data Connector applications
- ADP Marketplace



- x. Click Next
- xi. Set Notifications
 - 1. Decide if you want to add any notifications

Hire/Rehire ? ↗

Name Template

Select Steps

Select Fields ✓

Order Steps ✓

Assign Users

Set Notifications

Confirm Selections ✓

Template Name: International Employees

Specify when users should receive automatic e-mail notifications. To activate the options in a section, click On.

Assignment

When a new hire requires action from a user or profile:

A task will appear in the Message Center.

EDIT MESSAGE ▼

Also send an e-mail to the appropriate user or profile

Reminders

Set reminders for new hire activities that may be overdue.

Turn Reminders:

On Off

If a required user or profile does not complete the action within: days ▼

An e-mail reminder is sent to the required user or profile.

EDIT MESSAGE ▼

Send up to ▼ additional reminders, every 2 days after the first reminder

Also send a copy of the e-mail to the user who started the New Hire

Reassignment

CANCEL

PREVIOUS

NEXT

DONE



- xii. Click Next
- xiii. Confirm Selections
- xiv. Select Done
- xv. Email the ClearCompany Representative you are working with to let them know that the template is ready and the name of the template you wish to use with your ADP Bi-Directional Connector.