ADP Bi-Directional: Configure New Hire Template in ADP

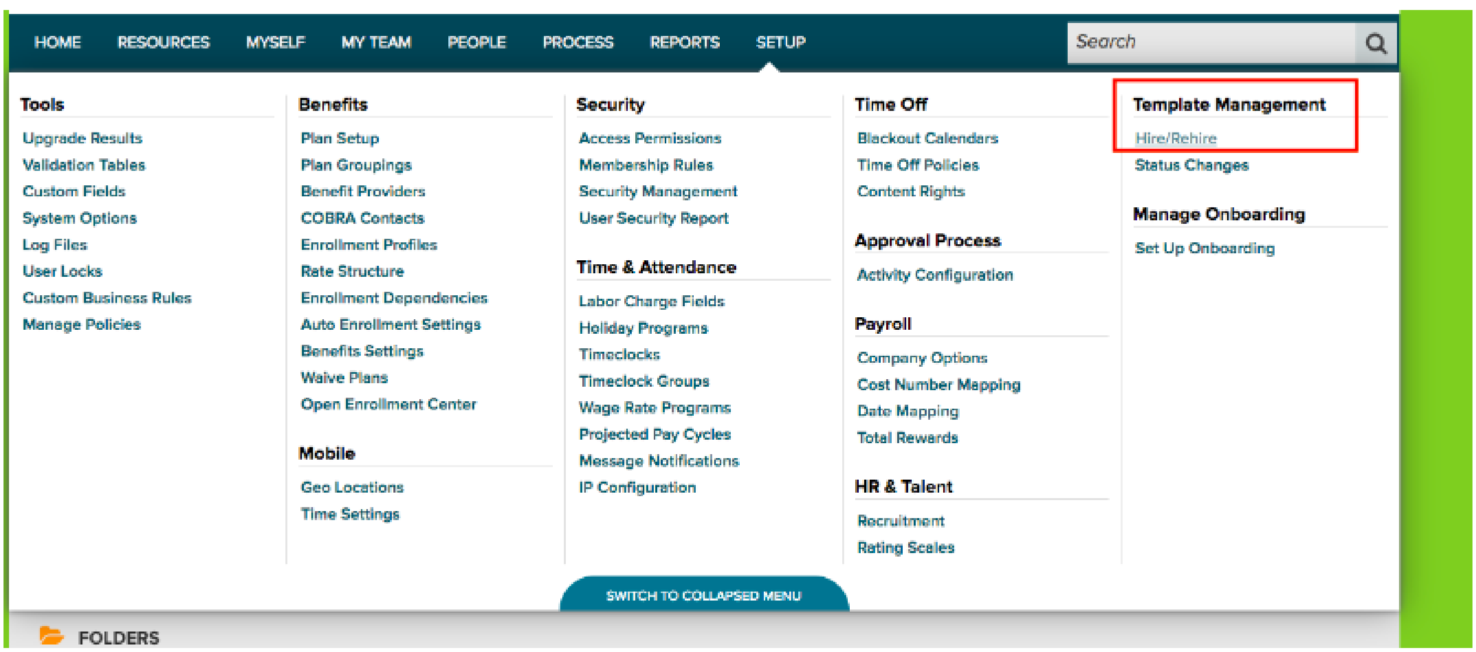
Below are step-by-step instructions on how to activate/edit the new hire template in a client's ADP TotalSource account. Clients can send new hires into a single New Hire Template. This template can be any ADP-System or a Custom New Hire Template.

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

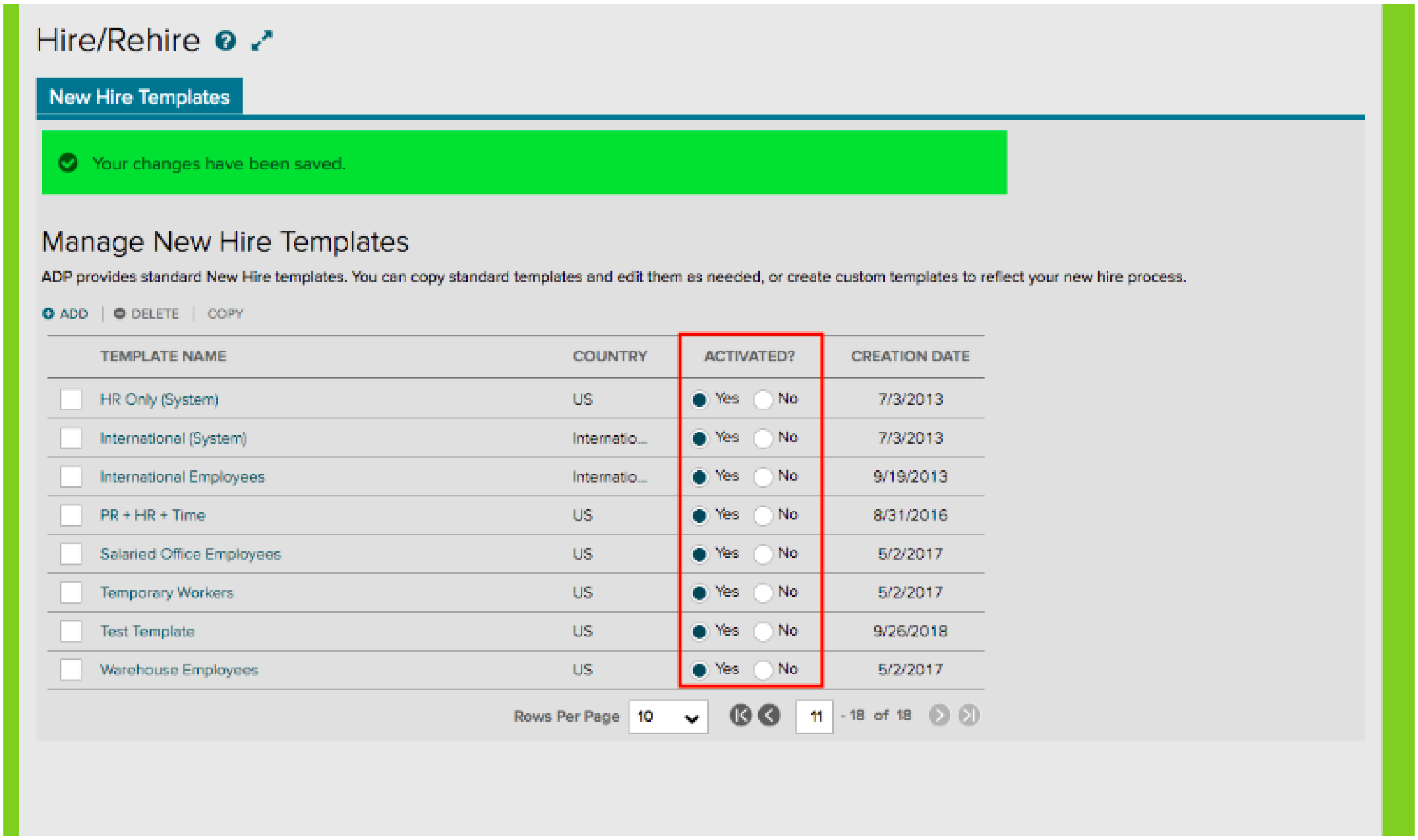
1. Choose which new hire template ClearCompany will send new hire data to.

2. Edit the template in question.

a. Go to setup, then select Hire/Rehire

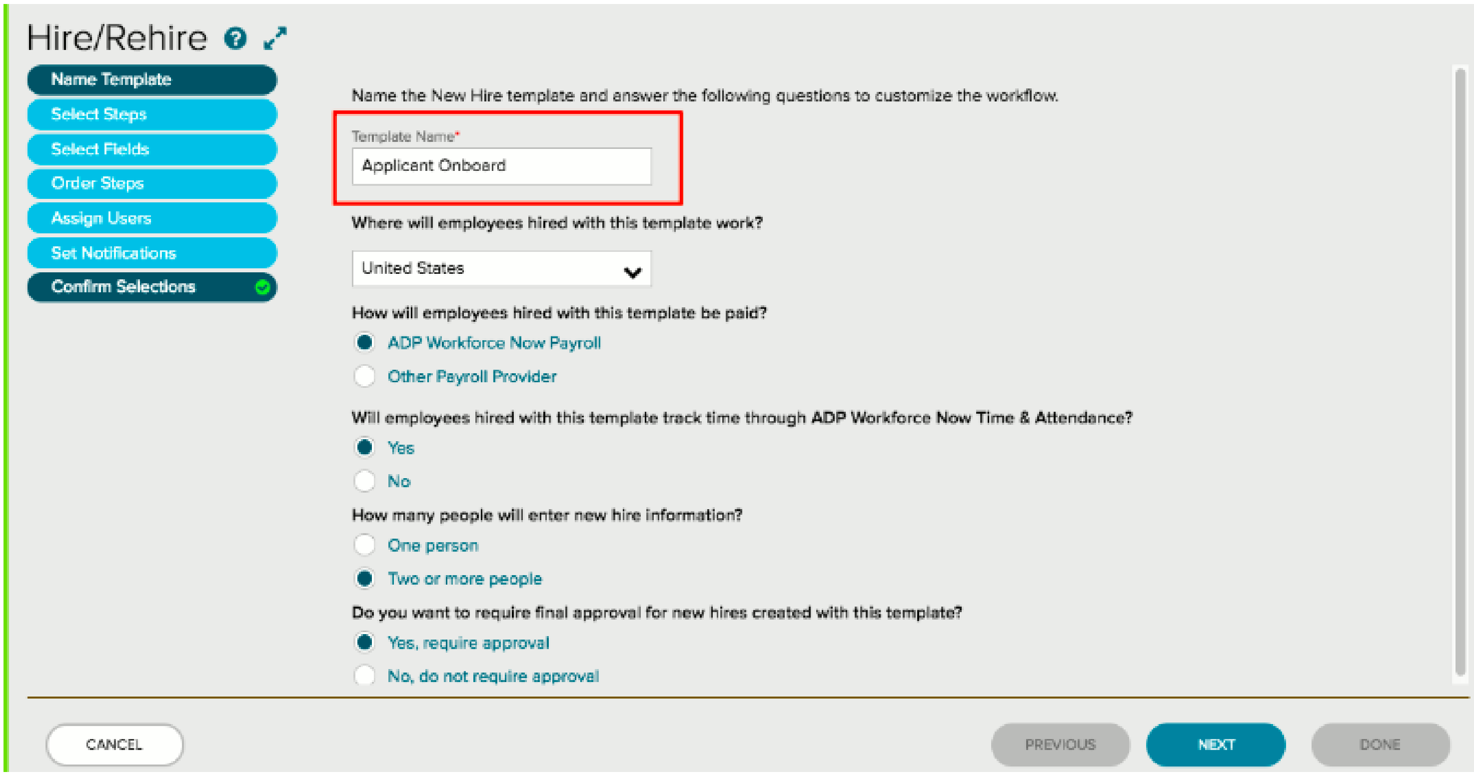


b. Ensure the desired template is set to **Yes** in the **Activated?** column



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 <u>not</u> 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

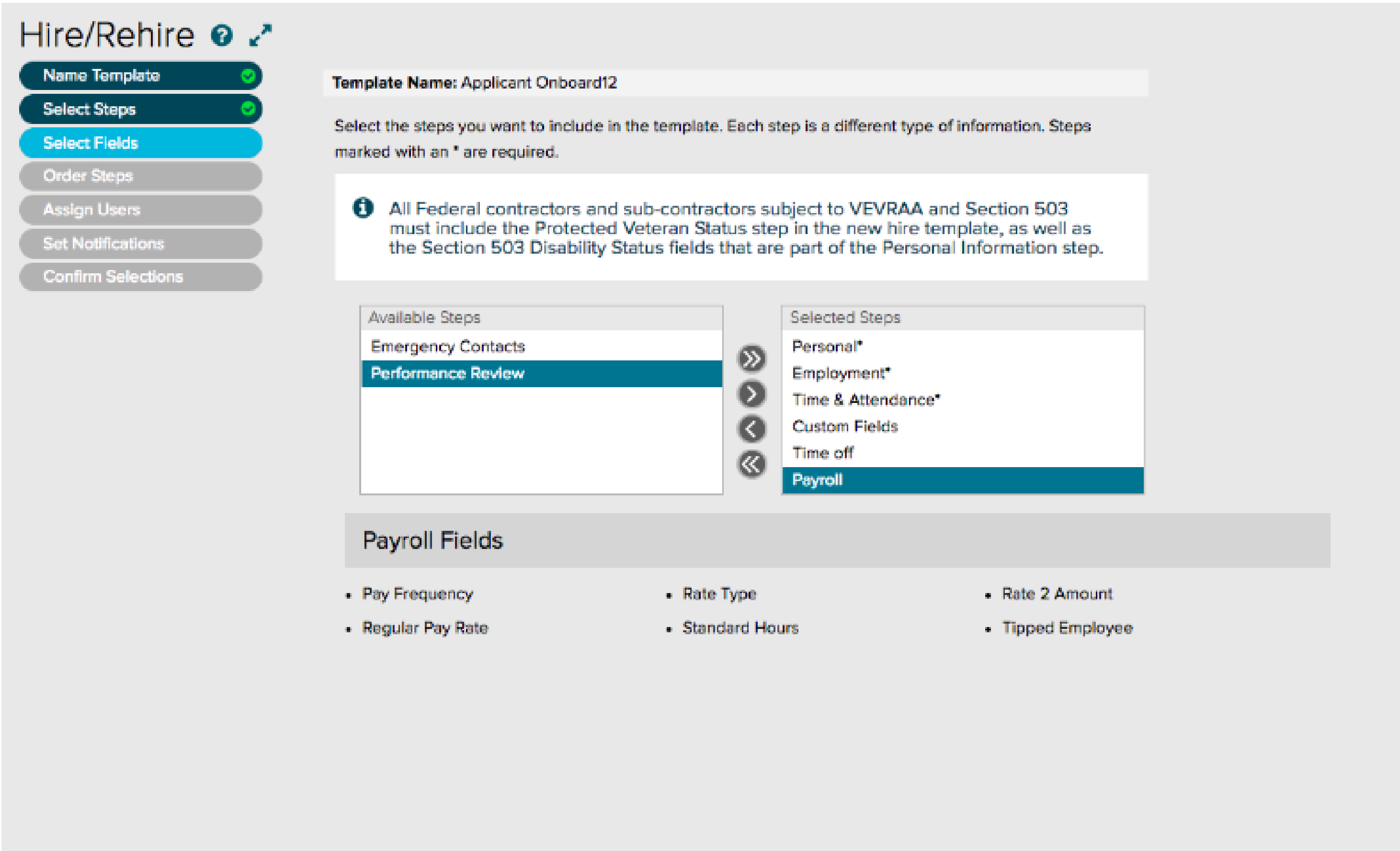


e. **Add and remove the appropriate steps to your template**

   i. ✅ Make sure the following steps are selected:
      1. Personal
      2. Employment
      3. Payroll

   ii. Optionally, add:
      1. Custom Fields
      2. Time Off
      3. Other steps that may be unique to your ADP account

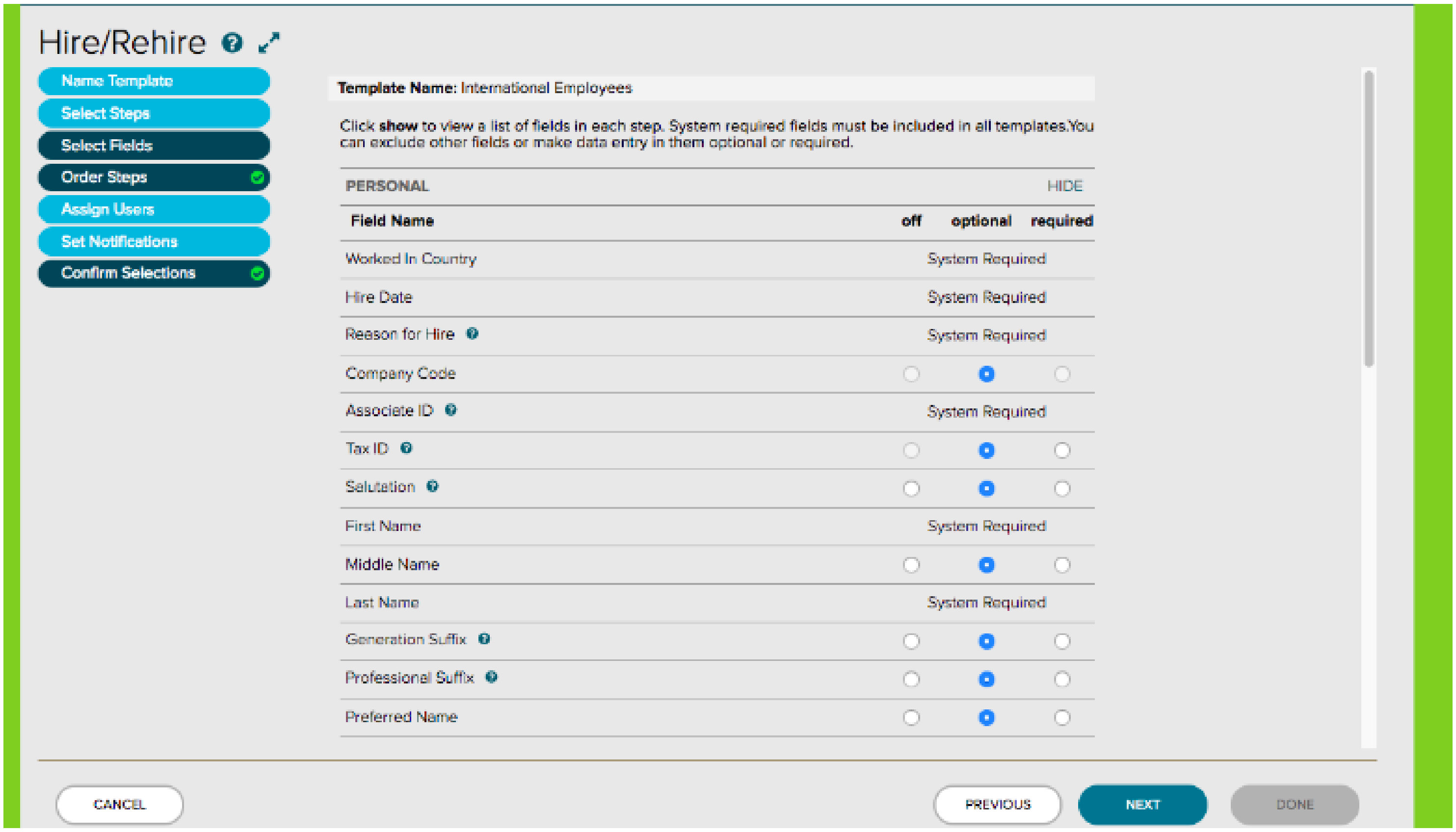
   iii. ❌ **Remove** Emergency Contacts & Direct Deposit
      1. ℹ️ If either of these is selected, remove them by selecting that field and clicking the < icon **Please note, these values will send over automatically from ClearCompany once the new hire is complete in ADP**



iv. Click Next

v. Decide what fields you'd like to turn Off, make Optional, or Required

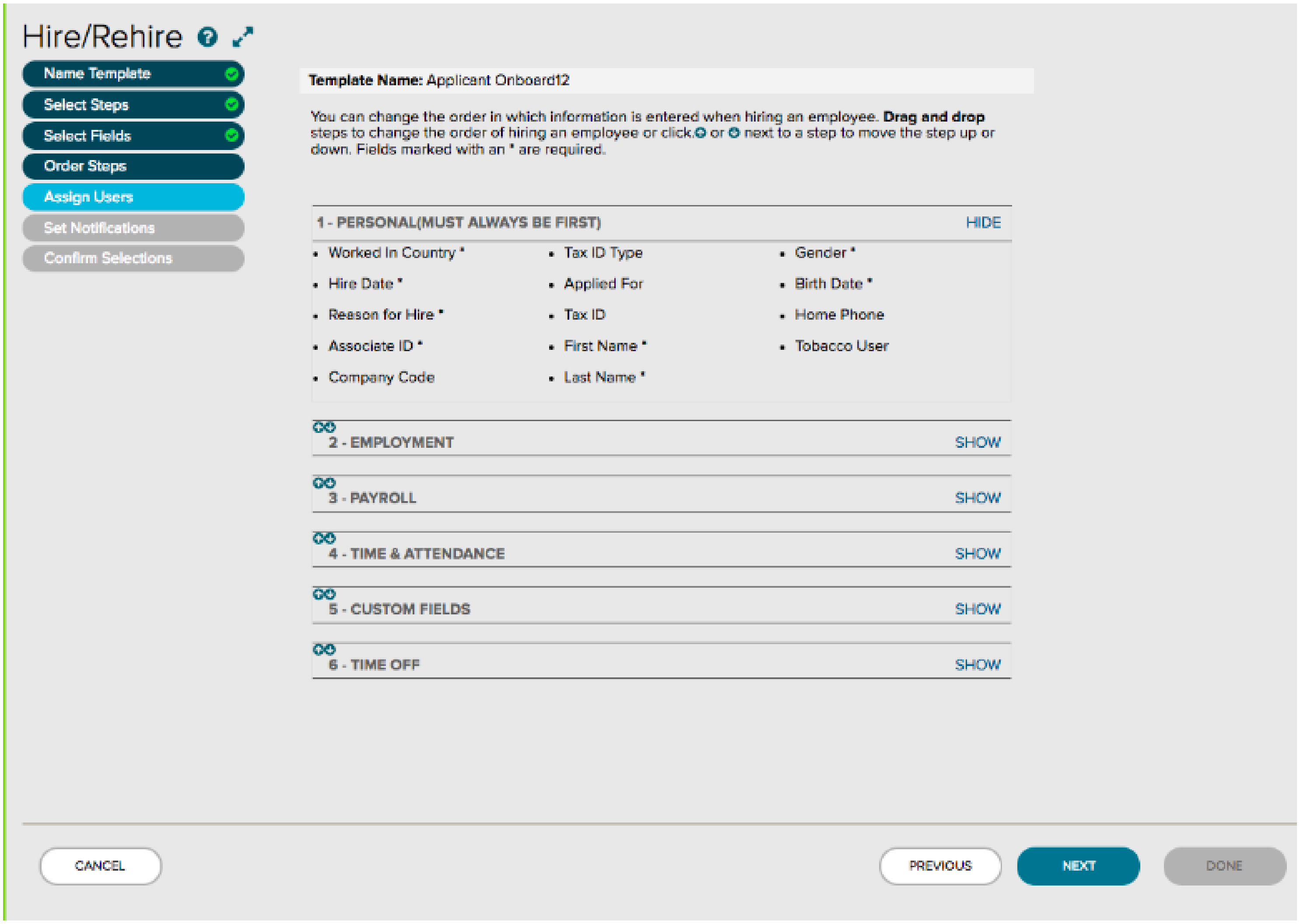
1. All of the data points coming from ClearCompany need to be selected as either Optional or Required
    a. To see the standard list of fields that ClearCOmpany will send for a new hire, click here.
2. In addition, please make the following fields required
    a. Work Email
    b. Home Email



vi. Click Next

vii. Set the Order of the Steps

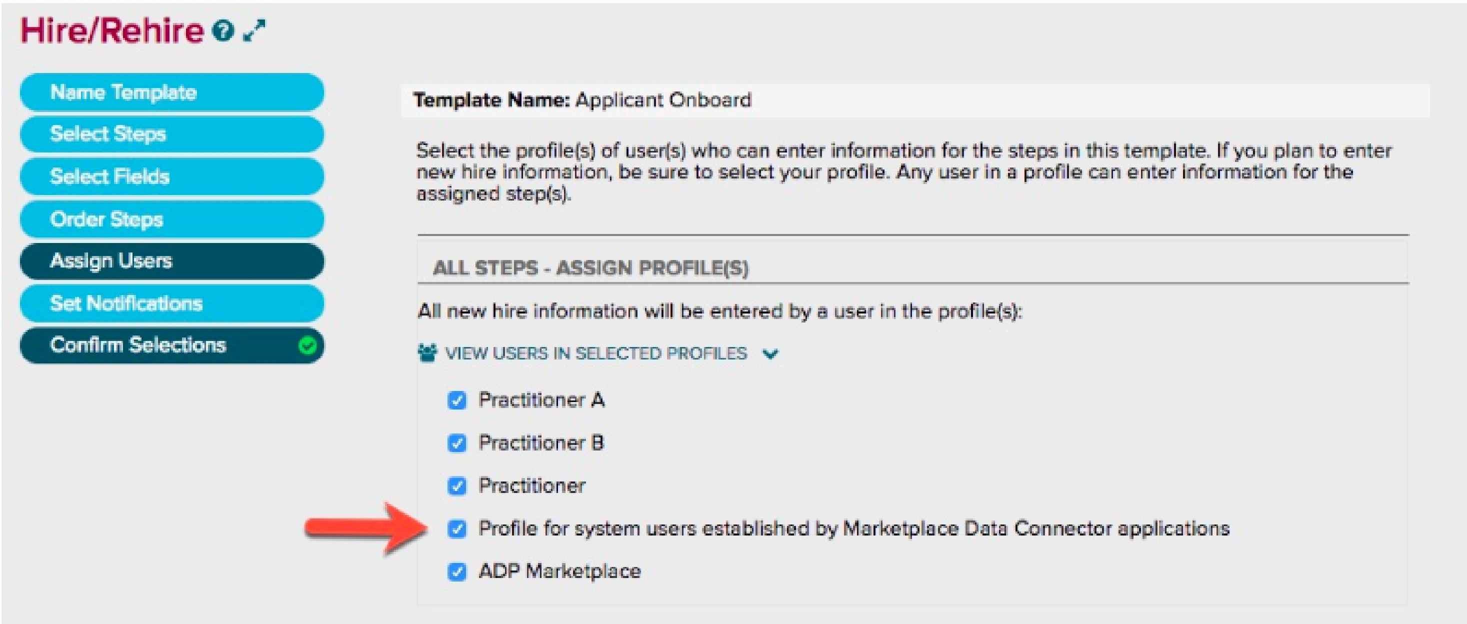
1. You can click the up and down arrows to move each section



viii. Click Next

ix. Select the profile(s) of user(s) who can enter information for the steps in this template

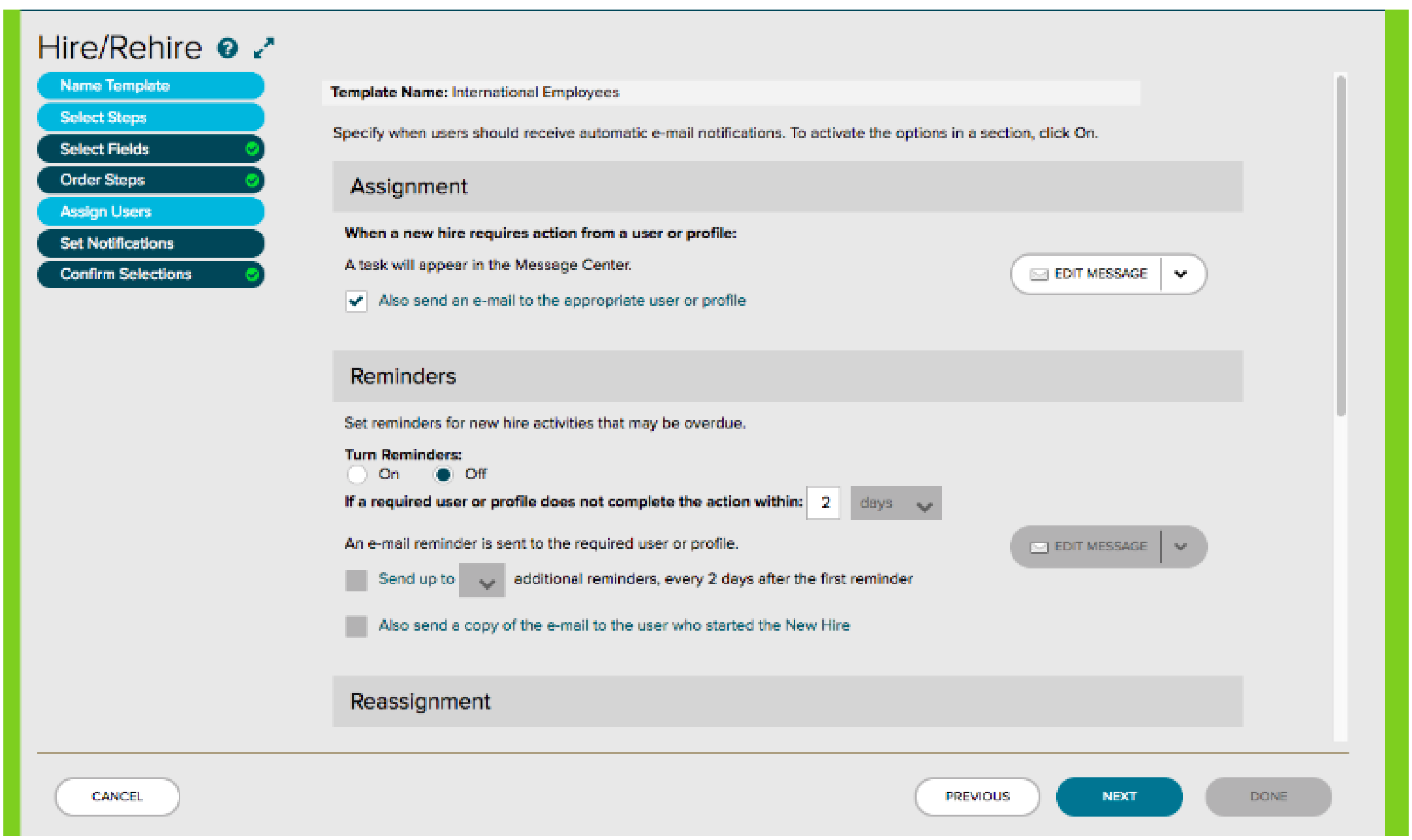
1. Select **Profile for system users established by marketplace data connector applications**
2. Select any other profiles you want to be able to view the new hire template



x. Click Next

xi. Set Notifications

1. Decide if you want to add any notifications



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.