Best Practices for Automating Your Onboarding
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Why Automate?

The paperwork involved in onboarding a new employee can be extensive. The process creates many challenges for your staffing agency to overcome:

- Onboarding forms vary by location, industry, and client and often change with little advance notice
- Clients require an employee to start immediately and cannot wait for you to complete the onboarding paperwork
- Remote employees are unable to come into the office to fill out forms and emailing sensitive documents in an unencrypted way increases your risk for a data breach
- Onboarding compliance is difficult to track and audit

Streamline your process and overcome these challenges by automating your onboarding paperwork. There are many automated onboarding systems available to you. This eBook offers you best practices to consider when selecting the automated onboarding system that will work best for your staffing agency.
Employee Experience

The forms involved in the employee onboarding process fulfil the needs of you, your clients, and the government. Despite these stakeholders, the *employee experience* should be your focus when creating an automated onboarding process. As you create your process, think about ways in which the process creates an ideal experience for the new employee. Meghan Biro, founder and CEO of TalentCulture, *suggests* the process should spread out paperwork and take advantage of technology.

Look for a solution that offers your employee the option to complete the required forms online from any computer, tablet, or mobile device. If you use this technology to make the forms available to the employee ahead of time, the employee has the ability to complete all onboarding forms at their convenience instead of sitting for a couple of hours in your office manually filling out forms.

Focus on employee experience instead of forms compliance to create happy new employees.
The next step after making the forms easily accessible to the employee is to ensure the experience is smooth and streamlined. Your electronic forms should leverage e-signature technology that allows the employee to record an electronic signature one time that can be applied to multiple onboarding forms.

Today’s technology enables e-signature without the need for hardware like an e-signature pad. Remember, the employee needs to be able to complete the entire process without the need to go to your office.

The ESIGN Act validated electronic signatures enabling staffing agencies to further improve employee onboarding.
Onboarding forms can be similar to each other and often request the same information. Don’t require your employee to enter their first and last names multiple times. With an automated solution, that kind of repetition is unnecessary.

Use an onboarding system that leverages the data entered by the employee by pre-populating the forms with data you have already collected like name, address, phone number, etc. This saves your new employee time and spares them frustration.

Leverage data collected on employees by pre-populating onboarding forms.
Flex to Client and Market

The type of forms needed during the onboarding process can vary greatly. There are some standards such as federal and state tax forms, but many of the forms tend to be custom. If you staff for multiple industries, you likely have different requirements by market. Industrial placements often have safety regulation forms while IT placements might require signature on internet usage policies.

Even within the same industry, you have varying forms for each client. You may have two clients that both require a signature on an employee policy, but the two policies are different. Your automated onboarding system should flex to the needs of your various markets and clients.

Your onboarding forms should be flexible enough to meet client, government, and internal needs.
Flex to Client and Market

With varying requirements across industries and clients, the forms required for an employee to start one position might be different from those required to start another position. Your new onboarding system should allow you to create the equivalent of an electronic onboarding packet to facilitate distribution of forms to the employee.

This will allow you to group together various onboarding items allowing you to build out your electronic onboarding packets ahead of time and assign them to a new employee based on the type of position, client, location, or more.

Organizing onboarding forms into electronic packets by client or position reduces administrative time and errors.
Compliance is a critical part of the onboarding process and it is measured in many ways.

**Are your forms up to date?**

No one wants an employee filling out an outdated application or tax form. Your automated onboarding process should allow you to centralize your forms. When new changes are made to the form, you can update it in one central place that is accessed by all branches and employees. This eliminates the risk of a branch accidentally having an employee fill out an outdated form.

Centralized forms guarantee employees are completing the most up to date forms.
Is all of the paperwork complete?

With an automated onboarding process, you can easily see the status of new employees in the onboarding process. You can see which employees have completed all forms and are ready for assignment and which employees still have forms to complete. In really sophisticated systems, you can even tie the next phases of the new employee process such as payroll to a form completion requirement.

Can you easily retrieve documentation for an audit?

Some documentation is critically required and failure to comply can result in lost clients and heavy fines. An automated onboarding solution should allow you to easily report on documentation compliance and track e-signature audit trails.
Secure Data

The onboarding process collects sensitive data on your employee. When you automate the process, a key consideration is data security. The last thing you want to worry about is whether your system can be hacked. The May 2016 issue of Staffing Industry Review lists cyber threats and data breaches as one of the top six things concerning staffing executives. Stolen data can cause problems for the staffing agency even when it isn’t used as some agencies often pay for credit monitoring services after breaches.

Fortunately, there are measures in place to help you determine whether or not your system is secure. Your hosted onboarding solutions should hold security accreditations such as ISO 27001. These distinctions are administered by autonomous organizations with strict policies and regulations that ensure that the vendor holding your employee’s social security numbers are as focused on data security as you are.

Eliminate the security risk of emailing unencrypted sensitive data by implementing an electronic onboarding system.
Easy to Administer

Your new onboarding solution should quickly accommodate changes and be easy to administer. Onboarding forms are dynamically changing with each new law, new client, or new internal policy. Sometimes, the changes need to be made quickly or even immediately.

Ensure that your system allows you to setup new forms in the system without involving your vendor. You want to implement new forms on your timetable and avoid incurring additional costs from vendors that charge for the setup. If you have to involve your vendor to implement a new form, you may find yourself weighing time and cost over the accuracy of a form.

Setting up new forms should be easy. Forms can change, but often times the changes can be infrequent. Your system should be easy to administer with an intuitive process that does not require re-training if you haven’t added a new form in a month.

Automating your onboarding streamlines the process for your employee, but not at the expense of your staff.
ATS Integration

Implementing an automated onboarding process should complement your existing systems like your applicant tracking software and payroll system. If you are lucky, you are already using a single system to manage your CRM, applicant tracking, and payroll. Avoid creating a separate place to store data on the same employees and eliminate the need for duplicate entry.

An onboarding system built into your ATS can leverage the data you have already collected on your employee during the recruiting process and pre-populate your onboarding forms. It can also leverage the new information provided by your employee in the onboarding forms to populate your ATS. Centralizing this data saves endless time and money spent on duplicate entry and ensures data accuracy as you begin to track all parts of the employment process in one system.

Onboarding systems embedded in your payroll and ATS systems further improve ROI through the reduction of duplicate entry and data inaccuracy.
Recruitment and Staffing Software for Fast-Growing Firms

Achieve efficiencies and enhance cross-company collaboration with Adapt’s recruitment software that ensures your staffing firm will succeed, grow and expand beyond expectations.

An intuitive and powerful solution for scaling and fast-growing staffing firms.

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