

SOP FOR PAYCOR ON-BOARDING

- Send invite to new hire employee.
- Employee has completed all the information and forms, Check for any Additional information and make sure they uploaded all documents for the I9, and that all information is correct, and make sure the direct deposit matches the uploaded Direct Deposit info. Check all forms to make sure everything is entered and correct, see the following steps.
- Personal Info – make sure that name is correct, gender, birth date, SS #, Marital Status and Ethnicity/Race is all entered, before next step.
- Contact Info – Make sure the address is correct and any other info on the page.
- Position – enter Job Title, FLSA should be hourly non-exempt, Department, Manager name, Status type and pay group and work location.
- Status – enter hire date and NO on owner or officer.
- I9 Verification – enter the info on-list A, B, or C. Passport goes on List A, Driver license, or a picture ID for List B, then Birth Certificate or SS Card for list C. They can look on I9 Document to see what they need upload for the documents.
- I9 Review – Manager is to verify the information on the I9 to make sure it is completed and matches the documents. Then they need to Check the box that they verified the information and then print their names and position at the bottom of page.
- Direct Deposit - make documentation matches their voided check or statement from the bank.
- Taxes – make sure that all information is correct on submitted forms.
- Compensation - add the starting wage amount for the employee. If wage is greater than the approved starting wage for the location you must submit a completed Status Change Form to HR & OPS for rate approval.
- Work Schedule – Fill out the Annual hours. Full time enter 2080 Annual Hours and Part Time would be 1040 Annual hours.
- Grant Access – Nothing needs done.
- Checklist – check and make all is completed.
- Hire – do not touch this one, that is after HR looks at everything and make sure everything is entered and then we will approve the new hire.
- Send an e-mail after on-boarding is completed and verified, to sharond@patokacapital.com, and copy Billy, Scott, and Maechale. In the email let Payroll, Operations, and HR know your have a new hire ready in onboarding. Subject line should read - location, On-Boarding Completed, Employee name, date

Subject Line Example: **KF12, On-Boarding Completed, William Geltmaker, 1.1.11**

Person completing this checklist is responsible for its total completion and that all items have been submitted correctly.

Print New-Hire Employee Name _____

Manager Print Name _____

Manger Sign Name _____

Date _____