



External On-Boarding Guide

Addison Group Brands



TABLE OF CONTENTS

On-Boarding Checklist (Click below to jump to page):

Part 1: Logging In	3
Part 2: Accessing On-Boarding Checklist	4
Part 3: New Employee Information	5
Part 4: Social Security Number Confirmation	7
Part 5: My Federal Tax Withholding Form	8
Part 6: My State Tax Withholding Form	10
Part 7: My Direct Deposit	12
Part 8: Visa Tax Exemption Notice.....	13
Part 9: Voluntary EEO Survey	14
Part 10: Voluntary Disability Survey	15
Part 11: Work Opportunity Tax Credit.....	16
Part 12: How to Complete the Handbook	17
Part 13: Completing HIPAA.....	19
Part 14: Wage Notices	21
Part 15: UKG Ready Mobile App Icon and Login.....	22

Part 1: Logging in

Step 1: To gain access, use this specific **link**. Enter your Username and Temporary Password provided to you and select **login**.

Be sure to type your password.
The system is sensitive to copying and pasting the password.

If you receive a notification that you are locked out, please email payroll@addisongroup.com.

Step 2: When prompted create a New Password and select **Change**.

Please note: The New Password must be at least 8 characters long and contain at least one of each of the following character types:

- Upper Case Letter
- Lower Case Letter
- Number
- Symbol

Step 3: To Configure the Virtual Code Settings we highly encourage you to **type** a number that receives **Text Messages** in the first prompt.

If you do not have a number that receives text messages, you can receive an email verification code.

Step 4: Select **Save**.

Step 5: We highly suggest selecting **Text Message**. If you wish to continue with Email, please note the verification code can take longer to generate. You have 15 minutes before the code expires.

Step 6: Select **Send Text Message**.

Step 7: Under **Enter Code** enter the code received.

Step 8: Click **Continue**.

Click here to watch a How To Clip!

1

Log In 11:26 AM [CDT]

Username

Password

☐ Remember Username

LOGIN

[Forgot your password?](#)

2

Change Password

Old Password

New Password ?

Confirm New Password

CHANGE

3

Configure Virtual Code Settings

Please verify that your contact information below is correct. If it is incorrect, enter in a valid Mobile, Phone and/or Email in order to receive a token code for future login.

At least one of the three methods below is required. As a best practice, enter in as many of these three as possible.

For the purposes of providing increased security the phone number entered will be shared with a third party to transmit a multi-factor authentication token.

Text Message #

Voice Phone #

Email

SAVE

5

Configure Virtual Code Settings

Please select one of the following methods to validate your identity. A code will be sent to the method chosen.

You will need to enter this code after you receive it. It should only take a moment to receive it once you've made your selection.

Methods:

☒ Text Message

☐ Voice

☐ Email

Text message will be sent to: *****8596

SEND TEXT MESSAGE

7

Enter Code

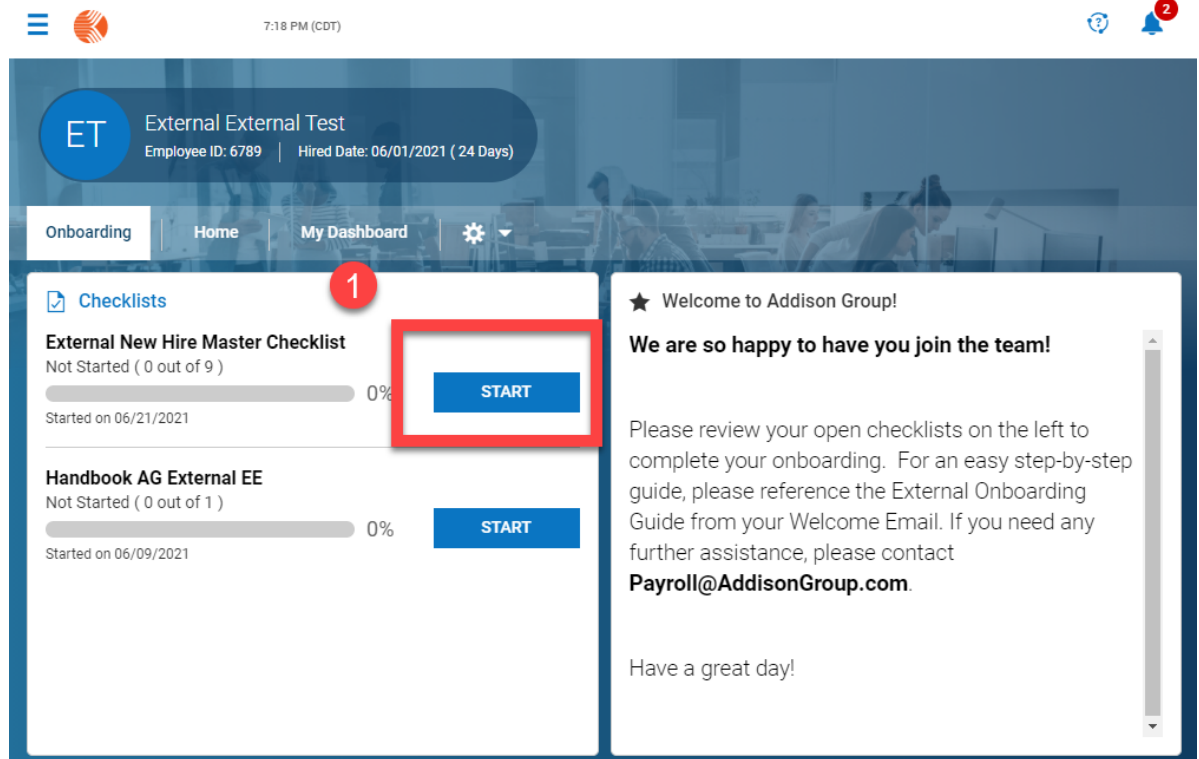
☐ By checking this box, the system will not require the entry of a code from this browser and computer with each login.

If you do not login from this device at least once in the previous 30 days, the system will require a new verification code sent to you.

8

CONTINUE

Step 1: After logging in, access your on-boarding checklist by clicking **START** under Checklists.

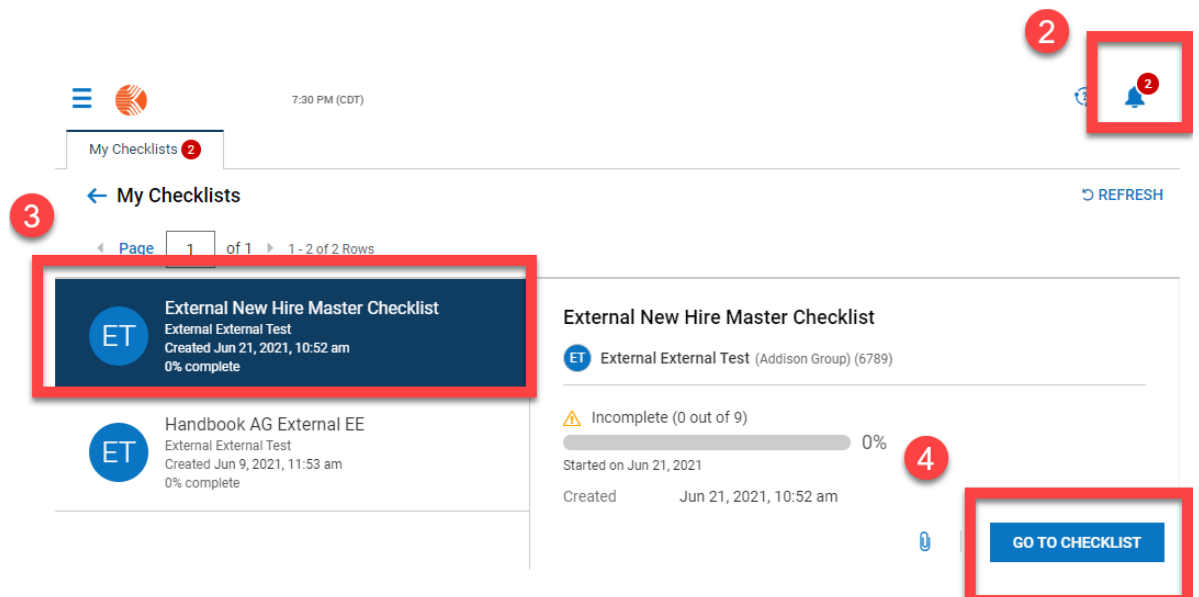


Only if needed, see the below steps.

Step 2: Another way to access your checklists is to, click the **bell icon** in the upper right-hand corner.

Step 3: Be sure the checklist you want to initiate is highlighted.

Step 4: Click **GO TO** **CHECKLIST** in the lower right corner to access your On-boarding task items.



Part 3: New Employee Information

[Click here to watch a How To Clip!](#)

Step 1: To Complete the New Employee Information, click the blue link titled **New Employee Information**.

Step 2: Fill out the necessary fields under the **Personal Information** tab. Then click **CONTINUE** at either the top or bottom of your screen.

Be sure the spelling listed is your legal, given first and last name. **This will be the name on your W2.** Correct if needed.

If you need to pause where you are and come back to your screen later you can select SAVE then **CONTINUE**.

Step 3: Fill out the necessary fields under the **Personal Contact Information** tab. Then click **CONTINUE** at either the top or bottom of your screen.

If you need to pause where you are and come back to your screen later you can select SAVE then **CONTINUE**.

Step 4: Under **Emergency Contact Information** tab, click **+ Add** to add an Emergency Contact.

Please complete/verify your information below.
Effective From * 04/22/2021

Emergency Contact Information

Account Contacts

Page 1 of 1 0 Rows All (0)

Name	Relationship	Preferred Phone Number	Contact Type	Primary	Actions
No Data to Display					

SAVE SUBMIT

Step 5: Fill out the necessary fields to add your account contact. Then click **SAVE**.

New Employee Information

Please complete/verify your information below.
Effective From * 04/22/2021

Emergency Contact Information

Add Account Contact

Primary Contact

Contact type
☐ Emergency ☐ Dependent ☐ Beneficiary

Salutation
Middle
Suffix

First Name *
Last Name *
Relationship *

Work Phone
Home Phone
Cell Phone

Be sure to fill in a phone number for your Emergency Contact

You can type the Relationship.

SAVE SUBMIT

Step 6: This will take you to your account contacts. Click **SUBMIT**.

Please complete/verify your information below.
Effective From * 04/22/2021

Emergency Contact Information

Account Contacts

Page 1 of 1 1 - 1 of 1 Rows All (1)

Name	Relationship	Preferred Phone Number	Contact Type	Primary	Actions
Emergency Contact Example	Mother			No	...

SAVE SUBMIT

Step 7: A popup will appear. Click **SUBMIT** to submit the HR Action Request and complete your New Employee Information to-do item.

Please complete/verify your information below.
Effective From * 04/22/2021

Emergency Contact Information

Account Contacts

Submit HR action request?

You are about to submit HR action request.

CANCEL SUBMIT

SAVE SUBMIT

Part 4: Social Security Number Confirmation

[Click here to watch a How To Clip!](#)

Step 1: To complete the Social Security Number Confirmation, click the blue link titled **Social Security Number Confirmation**.

This field will be filled in with a filler number. Please update to your social security number and submit.

Step 2: Update your Social Security Number under **Social Security Number Confirmation**.

Step 3: Select **Submit**.

Step 4: Once you've successfully submitted your correct SSN, press **OK**.

Step 5: Select the **blue arrow** next to Social Security Number Confirmation.

External New Hire Master Checklist

Incomplete (2 out of 9) 22%
Started on 05/21/2021

CONTINUE

New Hire Paperwork (6) 17% complete

- ✓ New Employee Information
- Social Security Number Confirmation**
- My Federal Tax Withholding Form
- My State Tax Withholding Form

1 Social Security Number Confirmation

Social Security Number Confirmation >

Due Date 04/06/2021 (Overdue) Waiting On External External Test

Workflow Status Not Started

← Social Security Number Confirmation

Please review and confirm your social security number is correct. **If it is not correct, please take this opportunity to correct it.** This field may have been automatically populated with a filler number, in order to get you into the system. It is important this is updated, as an incorrect social security number can impact:

- your W-2
- your ability to enroll in Addison's benefits
- your ability to apply for Unemployment benefits in the future.

Please ensure your "effective from" date is set to today.

Effective From * 06/01/2021

SAVE SUBMIT

2 Social Security Number Confirmation

Social Security * 000-00-6789

SAVE SUBMIT

Please ensure your "effective from" date is set to today.

Effective From * 06/01/2021

SAVE SUBMIT

Social Security Number Confirmation

Social Security * 123-45-6789

SAVE **3** SUBMIT

5 ← Social Security Number Confirmation

Please review and confirm your social security number is correct. **If it is not correct, please take this opportunity to correct it.** This field may have been automatically populated with a filler number, in order to get you into the system. It is important this is updated, as an incorrect social security number can impact:

- your W-2
- your ability to enroll in Addison's benefits
- your ability to apply for Unemployment benefits in the f

4 Hooray! Request submitted successfully.

Please ensure your "effective from" date is set to today.

Effective From * 06/01/2021

OK

Social Security Number Confirmation

Part 5: My Federal Tax Withholding Form

[Click here to watch a How To Clip!](#)

Step 1: To complete your Federal Tax Withholding form, click the blue link titled **View Your Withholding Forms**.

External New Hire Master Checklist

Incomplete (3 out of 9) 33%
Started on 05/21/2021

CONTINUE

New Hire Paperwork (6) 33% complete

- New Employee Information
- Social Security Number Confirmation
- My Federal Tax Withholding Form**
- My State Tax Withholding Form
- My Direct Deposit
- Visa Tax Exemption Notice

Voluntary Self Identification

My Federal Tax Withholding Form Mark as Complete

Please complete your Federal Form W-4 tax elections and State Form W-4, if applicable to your state income taxes. If the State Form W-4 reach out to Payroll@addisongroup.com for assistance.

View Your Withholding Forms >

Due Date: 04/06/2021 (Overdue) | Status: Waiting On | External External Test

Step 2: From there, click **ADD NEW** in the upper right-hand corner.

Withholding

Page 1 of 1 0 Rows Saved: [System]

Year	Status	State/Federal	Code	Name	Created

No Data to Display

ADD NEW

Step 3: A popup will appear. Next to the Federal Employee Withholding Certificate (W-4), click **+ Add**.

Withholding

Page 1 of 1 0 Rows Saved: [System]

Add New Withholding

2021

Name	Code
Federal (1)	
Employee's Withholding Certificate	W-4
Illinois (1)	
Illinois Withholding Allowance Worksheet	IL-W-4

+ Add

CANCEL

Step 4: Fill out your Withholding certificate. When you are finished, click **SUBMIT WITHHOLDING FORM** in the upper right-hand corner.

Form W-4 Employee's Withholding Certificate

OMB No. 1545-0074

2021

Complete Form W-4 so that your employer can withhold the correct federal income tax from your pay.
Give Form W-4 to your employer.
Your withholding is subject to review by the IRS.

Step 1: Enter Personal Information

(a) First name and middle initial: External E Last name: Test
Address: 125 S Wacker Dr.
City or town, state, and ZIP code: Chicago IL 60660
(c) ☐ Single or Married filing separately ☐ Married filing jointly or Qualifying widow(er) ☐ Head of household (Check only if you're unmarried and pay more than half the costs of keeping up a home for yourself and a qualifying individual)

(b) Social security number: 000-00-6789
Does your name match the name on your social security card? If not, to ensure you get credit for your earnings, contact SSA at 800-772-1213 or go to www.ssa.gov.

Complete Steps 2-4 ONLY if they apply to you; otherwise, skip to Step 5. See page 2 for more information on each step, who can claim exemption from withholding, when to use the estimator at www.irs.gov/W4App, and privacy.

Step 2: Multiple Jobs or Spouse Works

Complete this step if you (1) hold more than one job at a time, or (2) are married filing jointly and your spouse also works. The correct amount of withholding depends on income earned from all of these jobs. Do only one of the following.

(a) Use the estimator at www.irs.gov/W4App for most accurate withholding for this step (and Steps 3-4); or
(b) Use the Multiple Jobs Worksheet on page 3 and enter the result in Step 4(c) below for roughly accurate withholding; or
(c) If there are only two jobs total, you may check this box. Do the same on Form W-4 for the other job. This option is accurate for jobs with similar pay; otherwise, more tax than necessary may be withheld. ☐

TIP: To be accurate, submit a 2021 Form W-4 for all other jobs. If you (or your spouse) have self-employment income, including as an independent contractor, use the estimator.

Please note, payroll can only provide general information about the Form W-4. We cannot advise you in any way on what to enter on the form.

We encourage you to use the IRS's tax withholding estimator at irs.gov/individuals/tax-withholding-estimator, to help you determine how to accurately complete the form.

You can also download the latest copy of the IRS Publication 505, Tax Withholding and Estimated Tax irs.gov/pub/irs-pdf/p505.pdf.

Step 5: To agree to submitting your Federal Withholding Form, click Submit in the upper right-hand corner.

Step 6: A popup will appear. Enter your Kronos password and click **I Agree**. This action electronically signs your Federal Withholding Form.

Step 7: Your completed Federal Withholding Form will appear. You can download the form as a PDF for your records. Then, click the **blue arrow** next to Federal: W-4.

Step 8: Click the **blue arrow** next to Withholding.

Year	Status	State/Federal	Code	Name	Created
2021	Employee Completed	Federal	W-4	Employee's Withholding Certificate	05/24/2021 10:49a

Step 9: To complete the to-do item, click **Mark as Complete** in the upper right-hand corner. A popup will appear.

Step 10: Click **OK**. The to-do item will then appear as completed.

Step 11: Click **OK**.

Part 6: My State Tax Withholding Form

Step 1: To complete your State Tax Withholding form, click the blue link titled **View Your Withholding Forms**.

Notice:

*AK, FL, NV, NH, SD, TN, TX, WA, and WY residents will not see the above state forms.

*CO residents please fill out the Federal form listed within your State selection.

*If you moved and updated your address in the Employee Information section you may see multiple state options. Please contact your recruiter with your address change.

Step 2: From there, click **ADD NEW** in the upper right-hand corner.

Step 3: A popup will appear. Next to the state form associated with your state, click **Add**.

Step 4: Fill out your Withholding certificate. When you are finished, click **SUBMIT** in the upper right-hand corner.

*If the state form listed is not a state you live or work in please contact payrolltax@addisongroup.com.

← External New Hire Master Checklist

New Hire Paperwork (6) 50% complete

- ✓ New Employee Information
- ✓ Social Security Number Confirmation
- ✓ My Federal Tax Withholding Form
- My State Tax Withholding Form**
- My Direct Deposit
- Visa Tax Exemption Notice

My State Tax Withholding Form [Mark as Complete](#)

Please complete your Federal Form W-4 tax elections and State Form W-4, if applicable to your state income taxes. If the State Form W-4 does not match the state in which you work, reach out to Payroll@addisongroup.com for assistance.

[View Your Withholding Forms >](#)

Due Date: 04/06/2021 (Overdue) | Waiting On: | External External Test

Voluntary Self Identification (3) 0% complete

Voluntary EEO Survey

← Withholding

Page 1 of 1 1 - 1 of 1 Rows Saved: [System]

Year	Status	State/Federal	Code	Name	Created
2021	Processed	Federal	W-4	Employee's Withholding Certificate	05/24/2021 10:49a

Add New Withholding

2021

Name	Code
Federal (1)	
Employee's Withholding Certificate	W-4
Illinois (1)	
Illinois Withholding Allowance Worksheet	IL-W-4

Illinois: IL-W-4

Employee: Status: New

you are **entitled**. You are not required to claim these allowances. The number of additional allowances that you choose to claim will determine how much money is withheld from your pay.

9 Enter the total number of additional allowances you elect to claim on Line 2 of Form IL-W-4, below. This number may not exceed the amount on Line 8 above, however you can claim as few as zero. Entering lower numbers here will result in more money being withheld (deducted) from your pay.

IMPORTANT: If you want to have additional amounts withheld from your pay, you may enter a dollar amount on Line 3 of Form IL-W-4 below. This amount will be deducted from your pay in addition to the amounts that are withheld as a result of the allowances you have claimed.

----- Cut here and give the certificate to your employer. Keep the top portion for your records. -----

Illinois Department of Revenue
IL-W-4 Employee's Illinois Withholding Allowance Certificate

000-00-6789
Social Security number
External E Test
Name
125 S Wacker Dr.
City Chicago State IL ZIP 60660
Check the box if you are exempt from federal and Illinois Income Tax withholding and sign and date the certificate.

1 Enter the total number of basic allowances that you are claiming (Step 1, Line 4, of the worksheet). 1 0
2 Enter the total number of additional allowances that you are claiming (Step 2, Line 9, of the worksheet). 2
3 Enter the additional amount you want withheld (deducted) from each pay. 3

I certify that I am entitled to the number of withholding allowances claimed on this certificate.

Your signature Date

Employer: Keep this certificate with your records. If you have referred the employee's federal certificate to the IRS and the IRS has notified you to disregard it, you may also be required to disregard this certificate. Even if you are not required to refer the employee's federal certificate to the IRS, you still may be required to refer this certificate to the Illinois Department of Revenue for inspection. See Illinois Income Tax Regulations 86 IL Adm. Code 100.7110.

SAVE SUBMIT DOWNLOAD PDF

Step 5: To agree to submitting your State Withholding Form, click **Submit** in the upper right-hand corner.

Step 6: A popup will appear. Enter your Kronos password and click **I Agree**. This action electronically signs your State Withholding Form.

Step 7: Your completed State Withholding Form will appear. You can download the form as a PDF for your records. Then, click the **blue arrow** next to State: W-4.

Step 8: Click the **blue arrow** next to Withholding.

Step 9: To complete the to-do item, click **Mark as Complete** in the upper right-hand corner. A popup will appear.

Step 10: Click **OK**. The to-do item will then appear as completed.

Step 11: Click **OK**.

Submit Withholding Form

Please read all information below. Populating required fields and clicking 'I Agree' button below will submit this withholding form to HR department for further verification.

I certify that I am entitled to the number of withholding allowances claimed on this certificate.

Signature: External External Test Your Full Name*

Password: Please type password you (IvoryExternal) used for login to confirm

Date: 06/01/2021

Cancel I Agree

Illinois: IL-W-4

Employee: Status: New

Success (1) Hide All

Saved.

Form W4

Illinois Department of Revenue

Form IL-W-4 Employee's and other Payee's Illinois Withholding Allowance Certificate and Instructions

Note: These instructions are written for employees to address withholding from wages. However, this form can also be completed and submitted to a spouse if an employee is the sole provider for a spouse who is not working.

Note: For tax years beginning on or after January 1, 2017, the personal exemption allowance, and additional allowances if you or your spouse are age 65 or older, or if

Withholding

ADD NEW

	Year	Status	State/Federal	Code	Name	Created
	2021	Employee Completed	Illinois	IL-W-4	Illinois Withholding Allowance Worksheet	06/01/2021 03:09p
	2021	Processed	Federal	W-4	Employee's Withholding Certificate	05/24/2021 10:49a

External New Hire Master Checklist

Incomplete (3 out of 9)

Started on 06/01/2021

New Hire Paperwork (6) 50% complete

- New Employee Information
- Social Security Number Confirmation
- My Federal Tax Withholding Form
- My State Tax Withholding Form
- My Direct Deposit
- Visa Tax Exemption Notice

Voluntary Self Identification 0% complete

Enter Completion Data

Date: 06/01/2021

Time: 03:54 pm

CANCEL OK

Mark as Complete

External External Test

Hooray!

Checklist item "My State Tax Withholding Form" completed

OK

Part 7: My Direct Deposit

[Click here to watch a How To Clip!](#)

Step 1: To complete your Direct Deposit, click the blue link titled **Direct Deposit Change**.

Step 2: Click **+ Add**.

Step 3: A popup will appear. Enter your Direct Deposit information, and then click **SAVE**.

Note: If you want to add multiple accounts select the "+ Add" and add the additional account you wish to include.

Step 4: After you have saved your Direct Deposit information, click **SUBMIT** in the right-hand corner.

Step 5: Click **SUBMIT** to submit the HR action request and complete the to-do item.

Step 6: Click the **blue arrow** next to Direct Deposit Change.

← External New Hire Master Checklist

New Hire Paperwork (6) 67% complete

✓ New Employee Information

✓ Social Security Number Confirmation

✓ My Federal Tax Withholding Form

✓ My State Tax Withholding Form

My Direct Deposit

Visa Tax Exemption Notice

Voluntary Self Identification (3) 0% complete

My Direct Deposit

Please click on link for Direct Deposit Change to enter your banking information to receive your pay electronically. NOTE: If more than one bank account is desired (i.e. checking and savings account), please ensure the last bank account in the sequence (SEQ) column has the Calc Method of Entire/Remainder. Flat \$ amount, % of Gross Earnings or % of Net Pay Calc Methods need to come first in sequencing to ensure proper deposit amounts.

Direct Deposit Change >

Due Date 04/06/2021 (Overdue)

Waiting On

External External Test

Workflow Status Not Started

Group #1

Direct Deposits

+ Add

No Direct Deposits Defined

SAVE

SUBMIT

Add New Direct Deposit

Name

Enter Name

Description

Enter Description

Active From *

06/01/2021

Active To *

12/31/2099

Deposit Type

Direct Deposit

Bank Account Type *

Checking

Calculation Method *

Entire/Remainder

Account # *

Reenter Account # *

ABA # / Bank Routing # *

You can click this icon to verify your routing number.

CANCEL

SAVE

Important: Use today's date as the effective date.

Effective From *

06/01/2021

SAVE

SUBMIT

Group #1

Direct Deposits

Active Accounts

1 Direct Deposit (Active)

Bank Account Type

Checking

ABA # / Bank Routing

071000013

Account Number

123456789

Calculation Method

Entire/Remainder

Active From

Jun 1, 2021

Active To

Dec 31, 2099

Account Status

Active

Submit HR action request?

You are about to submit HR action request.

CANCEL

SUBMIT

← Direct Deposit Change

Part 8: Visa Tax Exemption Notice

[Click here to watch a How To Clip!](#)

Step 1: To complete your Visa Tax Exemption Notice, click the blue link titled **Visa Tax Exemption Notice**.

← External New Hire Master Checklist

Incomplete (5 out of 9) 56%
Started on 06/01/2021

... CONTINUE

New Hire Paperwork (6) 83% complete

- ✓ New Employee Information
- ✓ Social Security Number Confirmation
- ✓ My Federal Tax Withholding Form
- ✓ My State Tax Withholding Form
- ✓ My Direct Deposit
- Visa Tax Exemption Notice**

Voluntary Self Identification (3) 0% complete

Visa Tax Exemption Notice

Please review the attached notice and electronically sign and date the Notice to acknowledge your understanding.

Visa Tax Exemption Notice >

Due Date 04/06/2021 (Overdue) Waiting On External External Test

Step 2: Enter your name, the date, and then click **SIGN**.

← Visa Tax Exemption Notice

Page 1 of 1 91% Reset

Addison Group

Important Visa Tax Exemption Notice

Typically, nonresident aliens authorized to work in the United States are required to pay U.S. Social Security and Medicare taxes. However, certain classes of nonresident aliens are exempt from these taxes. If you are part of this certain class of nonresident aliens, **you are responsible for reporting your tax exempt status to Addison Group prior to your payroll being processed.**

Visa Tax Exempt Status is RARE and is different than federal or state tax exemptions. If you have questions about your eligibility or if this may apply to you, contact your tax professional. Addison Group cannot provide tax advice.

You may be required to provide applicable documentation to verify your Visa Tax Exempt Status. All applicable tax documentation should be submitted to payroll@addisongroup.com.

Addison Group will not be held responsible for any Social Security or Medicare taxes wrongly withheld from your pay as a result of this status not being reported accurately or in a timely manner. These taxes may not be refunded.

By signing below, I am acknowledging my understanding of this Visa Tax Exemption Notice.

EE Signature SIGN
Date * 06/01/2021
EE Printed name * Text Example

Step 3: Click **SUBMIT** in the right-hand corner.

← Visa Tax Exemption Notice

Page 1 of 1 91% Reset

Addison Group

Important Visa Tax Exemption Notice

Typically, nonresident aliens authorized to work in the United States are required to pay U.S. Social Security and Medicare taxes. However, certain classes of nonresident aliens are exempt from these taxes. If you are part of this certain class of nonresident aliens, **you are responsible for reporting your tax exempt status to Addison Group prior to your payroll being processed.**

Visa Tax Exempt Status is RARE and is different than federal or state tax exemptions. If you have questions about your eligibility or if this may apply to you, contact your tax professional. Addison Group cannot provide tax advice.

You may be required to provide applicable documentation to verify your Visa Tax Exempt Status. All applicable tax documentation should be submitted to payroll@addisongroup.com.

EE Signature SIGN
Date * 06/01/2021

Text Example

DOWNLOAD PDF **SUBMIT** SAVE

Step 4: A popup will appear. Click **SAVE & SIGN**.

← Visa Tax Exemption Notice

Page 1 of 1 91% Reset

Addison Group

Important Visa Tax Exemption Notice

Typically, nonresident aliens authorized to work in the United States are required to pay U.S. Social Security and Medicare taxes. However, certain classes of nonresident aliens are exempt from these taxes. If you are part of this certain class of nonresident aliens, **you are responsible for reporting your tax exempt status to Addison Group prior to your payroll being processed.**

Visa Tax Exempt Status is RARE and is different than federal or state tax exemptions. If you have questions about your eligibility or if this may apply to you, contact your tax professional. Addison Group cannot provide tax advice.

You may be required to provide applicable documentation to verify your Visa Tax Exempt Status. All applicable tax documentation should be submitted to payroll@addisongroup.com.

EE Signature SIGN
Date * 06/01/2021

Text Example

DOWNLOAD PDF SUBMIT SAVE

Save and submit the form?
You are about to save and submit this form to your manager for further verification.
CANCEL **SAVE & SUBMIT**

Step 5: Click **OK**.

Step 6: Click the **blue arrow** next to Visa Tax Exemption Notice.

Part 9: Voluntary EEO Survey

[Click here to watch a How To Clip!](#)

Step 1: Select Voluntary Self Identification Survey.

This includes Race or Ethnicity, Gender, and Veteran Status.

Filling out this information is voluntary, but marking that you received this information is a requirement of the checklist. If you do not wish to answer you can leave them blank.

Step 2: Click **CONTINUE** until you have passed through Race or Ethnicity, Gender, and Veteran Status.

Step 3: After you have saved your Voluntary Self Identification information, click **SUBMIT**, then

Step 4: **Submit** the HR action request and complete the to-do item.

Step 5: Click **OK**.

Step 6: Click the **blue arrow** next to Voluntary Self Identification Survey.

External New Hire Master Checklist

Incomplete (6 out of 9) 67%
Started on 06/01/2021

New Hire Paperwork (6) 100% complete

- ✓ New Employee Information
- ✓ Social Security Number Confirmation
- ✓ My Federal Tax Withholding Form
- ✓ My State Tax Withholding Form
- ✓ My Direct Deposit
- ✓ Visa Tax Exemption Notice

Voluntary Self Identification (3) 0% complete

- Voluntary EEO Survey
- Voluntary Disability Survey
- Work Opportunity Tax Credit

Voluntary EEO Survey

Please submit the survey.

Voluntary Self Identification Survey >

Due Date 04/08/2021 (Overdue) Waiting On External External Test

Workflow Status Not Started

06/01/2021

SAVE CONTINUE

Race or Ethnicity

Gender

Veteran Status

Race or Ethnicity

Ethnicity

Choose...

SAVE CONTINUE

06/01/2021

SAVE SUBMIT

Submit HR action request?

You are about to submit HR action request.

CANCEL SUBMIT

Veteran

Are You A Protected Veteran

SAVE SUBMIT

Hooray!

Request submitted successfully.

OK

Voluntary Self Identification Survey

Part 10: Voluntary Disability Survey

[Click here to watch a How To Clip!](#)

Step 1: To complete your Voluntary Disability Survey, click the blue link titled **Voluntary Self-Identification of Disability**.

Filling out this information is voluntary, but marking that you received this information is a requirement of the checklist. If you do not wish to answer you can leave them blank.

Step 2: If you wish, fill in the information. Filling out the form is voluntary, but you must click Submit in the lower right-hand corner to complete the check list.

Step 3: Click **SUBMIT** in the right-hand corner.

Step 4: Click **SUBMIT** to submit the HR action request and complete the to-do item.

Step 5: Click **OK**.

Step 6: Click the **blue arrow** next to Voluntary Self- Identification of Disability.

The screenshot shows a dashboard with a progress bar at the top indicating 'Incomplete (7 out of 9)' and '78%'. Below the progress bar, there is a list of tasks under 'New Hire Paperwork (6)'. The 'Voluntary Disability Survey' link is highlighted with a red box and a red circle with the number 1. To the right, there is a section titled 'Voluntary Disability Survey' with a 'Please submit the survey' message and a 'Voluntary Self-Identification of Disability' link highlighted with a red box. Below this, there is a table with columns for 'Due Date', 'Workflow Status', and 'Waiting On'. The 'Due Date' is '04/08/2021 (Overdue)' and the 'Workflow Status' is 'Not Started'.

The screenshot shows the 'Voluntary Self-Identification of Disability' form. It includes a section for 'PUBLIC BURDEN STATEMENT' and a 'Disability' dropdown menu. A red box and a red circle with the number 3 highlight the 'SUBMIT' button in the bottom right corner. A modal window is also visible in the center of the screen with the text 'Submit HR action request?' and a 'SUBMIT' button highlighted with a red box and a red circle with the number 4.

The screenshot shows a success message: 'Hooray! Request submitted successfully.' with a green checkmark icon. A red box and a red circle with the number 5 highlight the 'OK' button.

The screenshot shows a back arrow and the text 'Voluntary Self-Identification of Disability' highlighted with a red box and a red circle with the number 6.

Part 11: Work Opportunity Tax Credit

[Click here to watch a How To Clip!](#)

Step 1: If you wish to complete your Work Opportunity Tax Credit, click the blue link titled **Go To External Page**.

If you do not wish to complete this, skip to Step 3.

Step 2: A new window will pop up. If you wish, answer the required questions as it pertains to you. Once you have completed hit **SUBMIT**. A confirmation number will populate. Please retain this confirmation number for your records.

Step 3: Click **Mark as Complete**.

Step 4: Click **OK**.

Step 5: Congratulations! You have completed your External New Hire Master Checklist. Click the **blue arrow** next to Checklists.

External New Hire Master Checklist

Incomplete (8 out of 9) 89%

Started on 06/01/2021

New Hire Paperwork (6) 100% complete

- New Employee Information
- Social Security Number Confirmation
- My Federal Tax Withholding Form
- My State Tax Withholding Form
- My Direct Deposit
- Visa Tax Exemption Notice

Voluntary Self Identification (3) 67% complete

- Voluntary EEO Survey
- Voluntary Disability Survey

Work Opportunity Tax Credit

1

Go To External Page >

Addison Group participates in the Work Opportunity Tax Credit (WOTC), a federal tax incentive program created to promote the hiring of individuals who have faced employment challenges. Please click on the link to access the electronic questionnaire.

Due Date 04/06/2021 (Overdue) Waiting On External External Test

PLEASE ANSWER THE FOLLOWING
Not Sure? Select YES and we will verify for you.

Have you served in the U.S. Military? *

YES NO NOT SURE

Have you or a household member received SNAP (Food Stamps) in the past 6 months? *

YES NO NOT SURE

Have you or someone in your household received or stopped receiving TANF (Welfare), child care, housing, or transportation assistance in the past 2 years? *

YES NO NOT SURE

Have you received SSI (Social Security Income) benefits in the last 90 days? *

YES NO NOT SURE

Have you received vocational rehabilitation services? *

YES NO NOT SURE

Have you been unemployed for at least 27 weeks in a row, during which you received some unemployment compensation? *

YES NO NOT SURE

Please select your answers to the following questions. *

EDIT SELECTION

You made the following selections:

2

SUBMIT

Addison Group Work Opportunity Tax Credit Questionnaire

ABOUT SECURED BY ADP

Congratulations on completing the Work Opportunity Tax Credit Questionnaire. Thank you!

Your confirmation number: 01342FF1D1N

Please retain this confirmation number for your records.

3

Mark as Complete

89%

Work Opportunity Tax Credit

Enter Completion Data

Date 06/02/2021

Time 09:13 am

4

CANCEL OK

5

Checklists

OPEN (1) SUBMITTED

All Types This Year

Submitted On	Created On	Completed On	Status	Checklist Assigned To	Type	Supporting Documents	Actions
06/02/2021	06/01/2021	06/02/2021	Completed	External External Test	Employee Setup		

Part 12: How to complete the Handbook

[Click here to watch a How To Clip!](#)

Step 1: Access the External Handbook by clicking the **START** under Checklists.

If needed, see Steps 2-4 on Page 4 above to access your checklist.

The screenshot shows a user interface for 'External External Test'. At the top, it displays 'Employee ID: 6789' and 'Hired Date: 06/01/2021 (24 Days)'. Below this is a navigation bar with 'Onboarding', 'Home', and 'My Dashboard'. The 'Checklists' section is active, showing 'Handbook AG External EE' with a progress bar at 0% and a 'START' button highlighted by a red box and a red circle with the number 1.

Step 5: Click the link under documents to view the External Employee Handbook.

Please note: The handbook will be branded, but this example shows the AG Handbook.

Step 6: To complete your Employee Handbook Acknowledgment, click the blue link titled **Handbook Acknowledgment AG External EE**.

The screenshot shows the 'Handbook AG External EE' page. It includes a progress bar for 'Incomplete (0 out of 1)' and a 'Mark as Complete' button. The 'Employee Handbook Acknowledgement' section is highlighted, showing a blue link 'Handbook Acknowledgement AG External EE' highlighted by a red box and a red circle with the number 6. Below this, there is a table with columns for 'Due Date', 'Status', and 'Documents'. The 'Documents' column contains a link '03_-_Addison_Group_External_Employee_Handbook.PDF' highlighted by a red box and a red circle with the number 5.

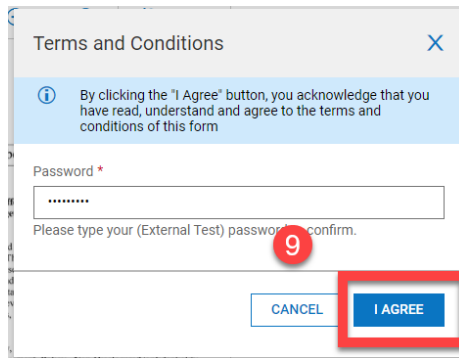
Step 7: Enter your name, the date, and then click **SIGN**.

The screenshot shows the 'Handbook Acknowledgement AG External EE' form. It includes a 'Date' field with the value '06/02/2021' and a 'SIGN' button highlighted by a red box and a red circle with the number 7. Below the 'SIGN' button is a field for 'EE Printed Name' with the value 'Example Employee'.

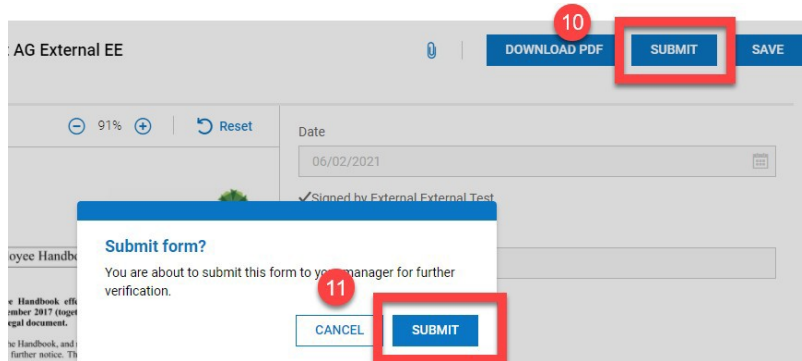
Step 8: Select **SAVE & SIGN**.

The screenshot shows a dialog box titled 'Save and sign the form?'. It contains the text 'You're about to save and sign the form.' and two buttons: 'CANCEL' and 'SAVE & SIGN'. The 'SAVE & SIGN' button is highlighted by a red box and a red circle with the number 8.

Step 9: Enter your Kronos password, and then click **I AGREE**.

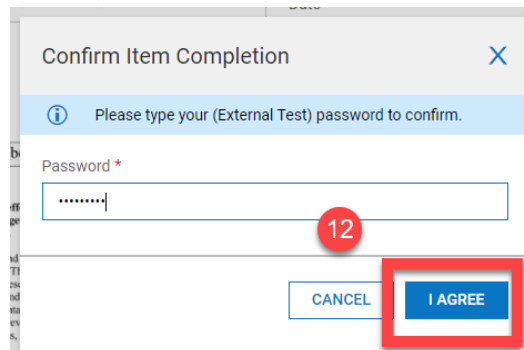


Step 10: Now that you have saved and signed the form, click **SUBMIT** in the upper right-hand corner.

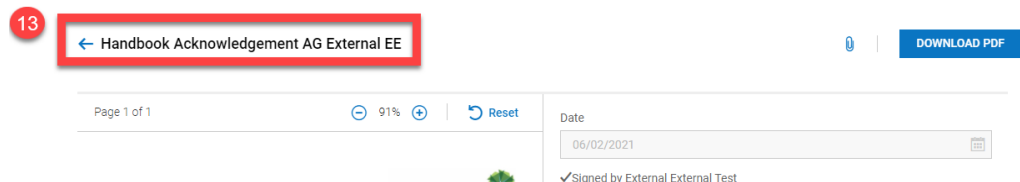


Step 11: A popup will appear. Click **SUBMIT**.

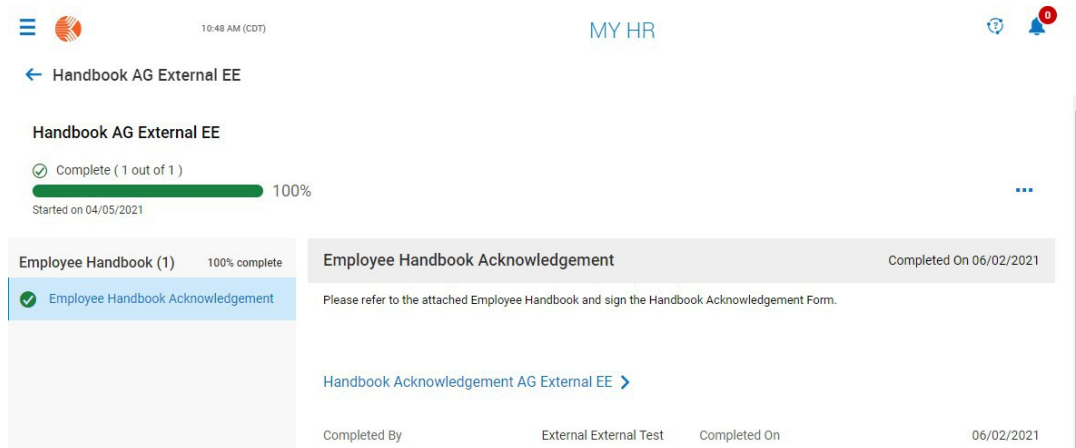
Step 12: Enter your Kronos password, and then click **I AGREE**.



Step 13: Click the **blue arrow** next to Handbook Acknowledgment AG External EE.



Congratulations! You have completed your Handbook Checklist.



13: Completing HIPAA

[Click here to watch a How To Clip!](#)

This is not applicable to all employees. Please disregard if it is absent from your checklist

Step 1: Access the HIPAA by clicking the **START** under Checklists.

If needed, see Steps 2-4 on Page 4 above to access your checklist.

Step 5: To complete the HIPAA item on your checklist, click the blue link titled **HIPAA Action**.

Step 6: From this page, you can view the Employee HIPAA Privacy & Security Rule Training. **Read through the document.**

Step 7: When you reach page 35, sign and date the acknowledgment. Then, click **SIGN**.

Step 8: A popup will appear. To agree to submitting your HIPAA Privacy & Security Acknowledgment Form, enter your Kronos password and click **I Agree**.

Step 9: Now that you have signed your HIPAA Acknowledgment, click **SUBMIT** in the upper right-hand corner.

Step 10: Another popup will appear. Click **SUBMIT** to submit the HR action request.

Step 11: Click the **blue arrow** next to **HIPAA ACTION** in the upper left-hand corner to return to the checklist.

Congratulations! You have completed the HIPAA & Security Acknowledgment. You can view this at any time for reference.

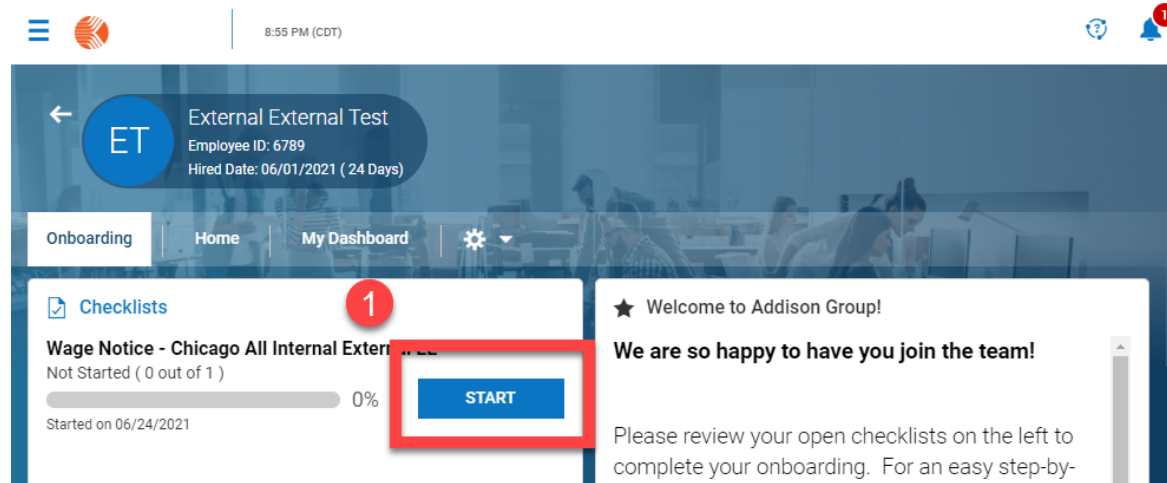
Part 14: Wage Notices

[Click here to watch a How To Clip!](#)

- *This will vary based on your work location and is not applicable to all employees.
- *Please disregard if it is absent from your checklist.
- *This Example includes the Wage Notice for Chicago.

Step 1: Access the Wage Notice- Chicago by clicking **START** under Checklists

If needed, see Steps 2-4 on Page 4 above to access your checklist.



Step 5: To complete the Wage Notice, click the blue link titled that reflects your local Wage Notice. On this page, it is titled **“Chicago Minimum Wage Notice.”**



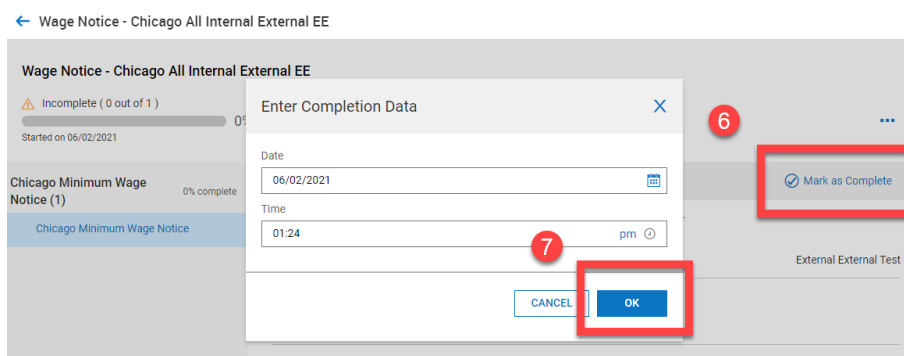
This will launch a separate document you can download and review. An example is pictured.

CHICAGO LABOR STANDARDS
IF YOU WORK AT LEAST 2 HOURS IN ANY 2 WEEK PERIOD FOR AN EMPLOYER IN CHICAGO, YOU ARE COVERED BY THE MINIMUM WAGE AND PAID SICK LEAVE ORDINANCE

	MINIMUM WAGE					
	SETS MINIMUM WAGE IN CHICAGO (MCC 1-24)					
	Large Employers 21 or more employees	Small Employers 4 to 20 employees	Youth Workers	Tipped Workers		
July 1, 2021 (Effective Date)				Large	Small	Youth
Min Wage	\$15.00	\$14.00	\$11.00	\$9.00	\$8.40	\$6.60
Overtime Min Wage	\$22.50	\$21.00	\$16.50	\$16.50	\$15.40	\$12.10

Tipped Workers are Workers who receive tips as part of their wage, like restaurant servers. If their tipped wage plus tips do not equal at least the number of hours worked times the minimum wage, the Employer must make up the difference.
All Domestic Workers, regardless of how many Workers their Employer employs, must receive the minimum Wage (\$14.00 from Employers with 0-20 Employees, and \$15.00 from large Employers)

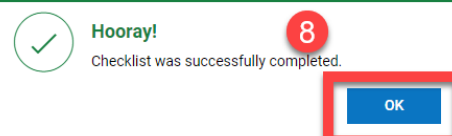
Step 6: Once you have reviewed the external document, return to Kronos and click **Mark as Complete.**



Step 7: Click **OK.**

Step 8: Click **OK.**

Congratulations! You have completed your Wage Notice.

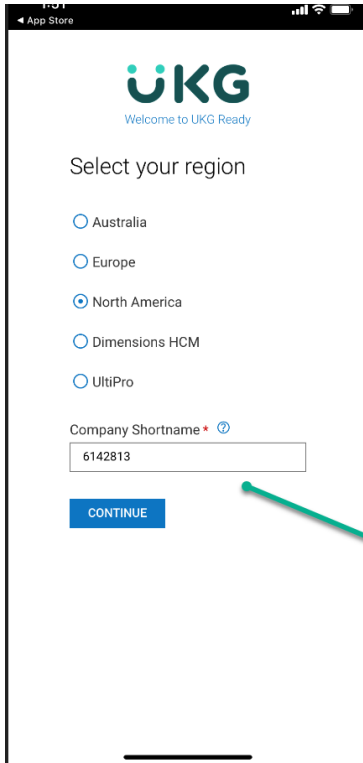
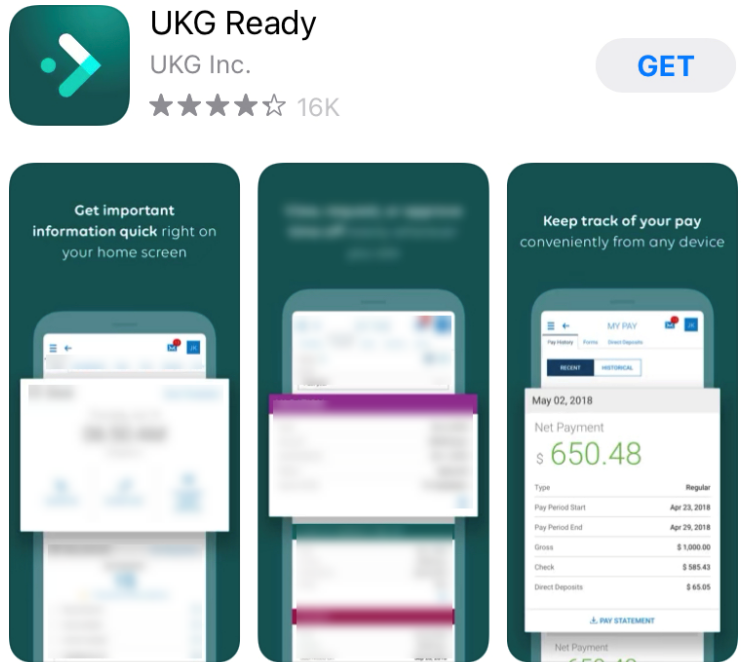


Part 15: UKG Ready Mobile App and Login

***Don't have computer access? Try using the UKG Ready Mobile App to complete your On-Boarding Checklists.**
The following steps show how to access the app.

Step 1: To gain access to the mobile app download the **UKG Ready App**.

Search **UKG Ready** in your Android or Apple app store. Download as you do all other apps.



Type: 6142813

Step 2: Once downloaded, open the app and select your region. **Select North America.**

Step 3: Type **6142813** for the Company Short Name.

***Please note, the steps to complete all On-Boarding Checklists remain the same as in the External On-Boarding Guide.**
Below are some examples of how the checklists in the UKG Ready app fit within a mobile screen. The steps to complete each item remains the same.

