



## Employee Navigator – Adding a New Hire

**Step 1:** Under **Quick Links** select **Add Employee**

Quick Links ⚙️ Customize

<a href="#">Add Employee</a>	<a href="#">Ad-hoc Reports</a>	<a href="#">Org Chart</a>
<a href="#">Import Employees and Enrollment</a>	<a href="#">View/Manage Saved Reports</a>	<a href="#">Add Document</a>
<a href="#">Add Company Note</a>	<a href="#">New Hire Reports</a>	<a href="#">Login Status Report</a>
<a href="#">Add Employee Note</a>	<a href="#">Termination Report</a>	

Admin Only <sup>1</sup>

**Step 2:** Enter New Hire's Social Security Number

### Add an Employee

SSN	Personal Info	Employment	Onboarding	Email	Finish
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#### Start with the SSN

Please enter the employee's social security number so we can check to see if the individual already exists in the system. ⓘ

SSN

[next >](#)

**Step 3:** Enter the following information:

1. First Name
2. Last Name
3. Gender
4. Date of Birth
5. State of Residence
6. Work Email


*Payroll Work State and Personal email are not required.*

## Add an Employee

SSN   Personal Info   Employment   Onboarding   Email   Finish

### Then add the employee information

The following data is required to establish a new employee record

SSN	000-00-0000
First Name	<input type="text" value="Garrett"/>
Middle Name	<input type="text"/>
Last Name	<input type="text" value="Smith"/>
Suffix	<input type="text" value="--Select--"/>
Gender	<input checked="" type="radio"/> Male <input type="radio"/> Female
Date of Birth	<input type="text" value="01/01/1980"/> 
State of Residence	<input type="text" value="California"/>
Payroll Work State	<input type="text" value="California"/>
Work Email	<input type="text" value="gsmith@synergyenrollment.com"/>
Personal Email	<input type="text"/>

[next >](#)

**Step 4:** Click **Next**

**Step 5:** Enter the following information:

1. Hire Date
2. Class
  - a. *This will be which bundle your company offers*
3. Payroll Group
  - a. *How often are deductions taken*
4. Business Unit
  - a. *Your company name*
  - b. *If you have a special class, it will show up as an option here (e.g. Executive, Years of service).*
5. If you offer Bundle 2, the salary information is required.
6. *Job Title, Manager, Annual Benefit Salary, ACA Classification, Statutory Class and Seasonal are not required.*

add an Employee

SSN Personal Info **Employment** Onboarding Email Finish

Then add the employee information

The following data is required to establish a new employee record

SSN 000-00-0000

Hire Date 02/04/2020

Job Title Testing Manager

Class Bundle 1+2

Payroll Group Bi-Weekly

Manager type manager's last name    No manager

Salary fields ⓘ

Pay Basis Salary

Hourly Rate

Hours Per Week 40.00

Annual Base Salary 50000

Annual Benefit Salary

ACA / Statutory Classifications ⓘ

ACA Classification --Select--

Statutory Class --Select--

Is Seasonal  Yes  No

Business Unit Demo Demo

**Step 6:** Click **Next**

**Step 7: Select Finish Up**

Add an Employee

SSN Personal Info Employment Onboarding Email Finish

Garrett Smith has been added

You haven't set up any onboarding tasks yet.

Check out the **Tasks** tab when you're finished entering employees to turn on this feature!



**Step 8: If you have not already, enter New Hire's Email**

**Step 9:** Select **Send** to send the New Hire the registration link. If you do not want to at this time, select **No, not now**.

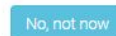
Add an Employee

SSN Personal Info Employment Onboarding Email Finish

Send Garrett Smith a registration email?

Email:

gsmith@synergyenrollment.com



**Step 10:** Select one of the following:

1. Select **Go to Profile** to view the employees profile.
2. Select **Go to Enrollment** to begin the New Hire Enrollment.
3. **Add another employee** will bring you back to Step 2.
4. **Finished** will bring you back to your home screen.

**If you have questions, give us a call! 858-282-0660**