

Onboarding 101: Your Guide to Successfully Welcoming New Hires

Presented by Robin Schooling, SPHR



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Welcome to Today's Webinar

Before we get started...

- Use the chat box on the left to interact with presenters and ask us questions
- If you're having trouble, please message us in the chat box, and we will do our best to assist you
- You will receive a copy of the slides in two days
- Join the conversation at #Onboarding101

About Robin

- 25 years experience in senior HR Management
- Variety of industries: health care, gaming, manufacturing and banking
- Regular speaker at HR conferences
- Serve on advisory boards
- Founder of HR consulting firm
- Founder of blog, RobinSchooling.com

Welcome to The Company!



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Why Onboarding?

- 4% of new hires quit after a disastrous first day
- 22% of employee turnover occurs in the first 45 days of employment
- Turnover costs 150% of an employee's salary

Learning Objectives

- Legal obligations and recommendations
- What your onboarding should cover
- How to evaluate your onboarding program

Legal Obligations



Legal Obligations

- Form W-4 for federal tax withholding
- State withholding form
- I-9 forms to verify work eligibility
- New hire registration form
- OSHA safety training
- Additional forms or training may be required, depending upon your location, business size or employer type

Instructions for Employment Eligibility Verification
 U.S. Citizenship and Immigration Services

Form I-9
 OMB No. 1615-0047
 Expires 03/31/2016

Read all instructions carefully before completing this form.

Anti-Discrimination Notice: It is illegal to discriminate against any work-authorized individual in hiring, discharge, recruitment or referral for a job, or in the employment eligibility verification (Form I-9 and E-Verify) process based on that individual's citizenship status, immigration status or national origin. Employers CANNOT specify which documents they will accept from an employee. The refusal to hire an individual because the documentation provided does not meet the requirements of Form I-9 is not discrimination.

What is the Purpose of This Form?
 Employers must complete Form I-9 to document verification of the citizen and nationality (based after November 6, 2009, to work in all states) (CNM), employers must complete Form I-9 to document new employees (both citizen and non-citizen) hired after November 8, 2009 and November 23, 2009.

General Instructions
 Employers are responsible for completing and retaining Form I-9 for all employees, including those recruited and referred for a job who are hired after the effective date of the law. Employers may be fined if they do not complete Form I-9 for all new hires.

Section 1. Employee Information and Attestation
 Newly hired employees must complete and sign Section 1 of Form I-9 before the employer has accepted a job offer.

Name: Provide your full legal last name. First name, and include two last names or a suffix/initial last name, include both names and initials in the first letter of your second given name, or if other names used: Provide all other names used, if any (include City, State, and Zip Code. Do not provide a post office box and zip code or an international address in this field).

Date of Birth: Provide your date of birth in the mm/dd/yyyy format. U.S. Social Security Number: Provide your 9-digit Social Security Number. If your employer participates in E-Verify, you must provide your Social Security Number (SSN). If you are a potential DHS or SSA employee, you must provide your SSN to the DHS or SSA. All employment information in Section 1, under penalty of perjury, is true and correct to the best of your knowledge and belief.

1. A citizen of the United States
2. A non-citizen national of the United States (Non-citizen national means citizens of the former Trust Territory of the Pacific Islands)
3. A lawful permanent resident (A lawful permanent resident is an alien who is lawfully admitted for permanent residence and is authorized to remain in the United States indefinitely, or has been admitted as a conditional resident. If you check this box, write only in the field next to your selection. At this time, the USCIS New Hire Registration Form is required for all new hires.)

Form I-9 Instructions 1008011 N EMPLOYERS MUST NOT WRITE ON THIS FORM

Form W-4 (2015)
 The instructions on this page supplement general instructions for Form W-4 (2015).
Basic instructions: If you are not exempt, complete the Personal Allowances Worksheet on page 2 before filling out Form W-4. If you are exempt, complete Form W-4 without completing the Personal Allowances Worksheet.
Employers: Do not withhold more than the amount of federal income tax shown on the employee's Form W-4. Do not withhold more than the amount of state income tax shown on the employee's Form W-4. Do not withhold more than the amount of local income tax shown on the employee's Form W-4. Do not withhold more than the amount of other taxes shown on the employee's Form W-4. Do not withhold more than the amount of other taxes shown on the employee's Form W-4. Do not withhold more than the amount of other taxes shown on the employee's Form W-4.

Personal Allowances Worksheet (Keep for your records)

A. Enter "1" for yourself if no one else can claim you as a dependent
 B. Enter "1" if you are single and have only one job, or if you are married, have only one job, and your spouse does not work, or if you are married, have only one job, and your spouse works for you and you are the only one who works for you.
 C. Enter "1" for your spouse. If you are married and have other working spouses or more than one job, entering "0" may help you avoid having too little tax withheld.
 D. Enter number of dependents (other than your spouse or yourself) you claim on your tax return.
 E. Enter "1" if you file as head of household on your tax return (see conditions under Head of household above).
 F. Enter "1" if you have at least \$2,000 of child or dependent care expenses for which you plan to claim a credit.
G. Child Tax Credit (including additional child tax credit): See Pub. 877, Child Tax Credit, for more information.
H. Additional Child Tax Credit: See Pub. 877, Child Tax Credit, for more information.
**I. If your total income will be less than \$60,000 (\$70,000 if married), enter "1" for each eligible child. If you have two to four eligible children or less "2" if you have five or more eligible children.
 J. If your total income will be between \$60,000 and \$84,000 (\$70,000 and \$116,000 if married), enter "1" for each eligible child.
 K. Additional Child Tax Credit: See Pub. 877, Child Tax Credit, for more information.
 L. If you plan to itemize or claim adjustments to income and want to reduce your withholding, see the Deductions and Adjustments Worksheet on page 2.
 M. If you are single and have more than one job or are married and you and your spouse both work and file combined withholdings from all jobs received \$60,000 (\$70,000 if married), see the Tax Exemption/Multiple Allowance Worksheet on page 2 to see if you qualify for the multiple allowance.
 N. If a number of the above situations apply, stop here and enter the number from line 10 in line 3 of Form W-4 below.**

For accuracy, complete all worksheets that apply.

Separate here and give Form W-4 to your employer. Keep the top part for your records.

Form W-4 Employee's Withholding Allowance Certificate
 OMB No. 1545-0047
 Expires 12/15/2015

From: Department of the Treasury
 Instructions for Form W-4 (2015)

File for federal income tax withholding.
 Last name: _____ First name: _____ Social Security number: _____

Home address (include apt. and care mail): _____
 City or town, state, and ZIP code: _____

Single Married Married but with a higher single rate.
 Exemption for rights reserved, or spouse's contribution rate. See "Single rate."
 If you are not sure which rate best shows up your personal situation, use the "Single rate."

Check boxes: You must use **1** or **2** for each situation on page 2.
 1 **2** **3** **4** **5** **6** **7** **8** **9** **10** **11** **12** **13** **14** **15** **16** **17** **18** **19** **20** **21** **22** **23** **24** **25** **26** **27** **28** **29** **30** **31** **32** **33** **34** **35** **36** **37** **38** **39** **40** **41** **42** **43** **44** **45** **46** **47** **48** **49** **50** **51** **52** **53** **54** **55** **56** **57** **58** **59** **60** **61** **62** **63** **64** **65** **66** **67** **68** **69** **70** **71** **72** **73** **74** **75** **76** **77** **78** **79** **80** **81** **82** **83** **84** **85** **86** **87** **88** **89** **90** **91** **92** **93** **94** **95** **96** **97** **98** **99** **00**

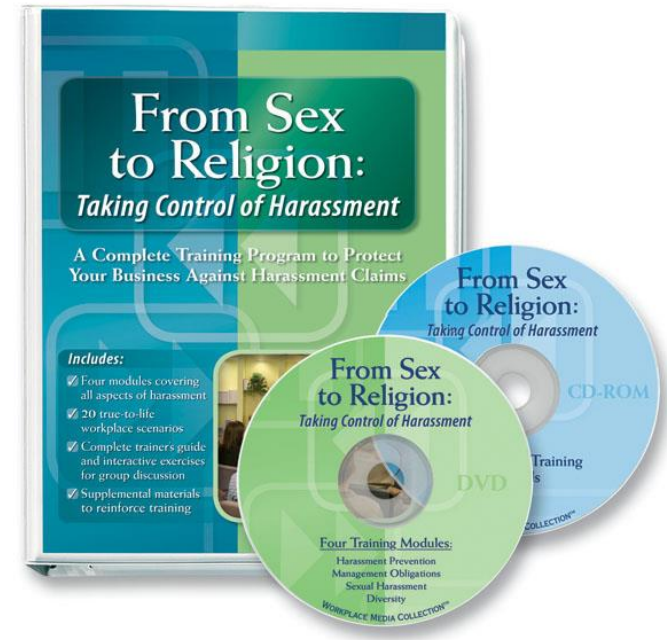
6 Total number of allowances you are claiming (from line 14 above or from the applicable worksheet on page 2).
7 Additional amount, if any, you want withheld from each paycheck.
8 Claim exemption from withholding for 2015, and certify that you meet both of the following conditions for exemption:
 • Last year I had a right to a refund of all federal income tax withheld because I had no tax liability, and
 • This year I expect a refund of all federal income tax withheld because I expect to have no tax liability.
 If you meet both conditions, write "Exempt" here.

Under penalty of perjury, I declare that I have examined this certificate and, to the best of my knowledge and belief, it is true, correct, and complete.
 Employer's signature (This line is not valid unless you sign it): _____ Date: _____
 Employer's name and address (Employer: Complete lines 8 and 10 only if filing by the IRS): _____ Office code: _____ Employer identification number (EIN): _____

For Privacy Act and Paperwork Reduction Act Notice, see page 2. Cat. No. 152002 Form W-4 (2015)

Legal Recommendations

- Basic safety training
- Sexual harassment training
- Diversity training
- State-compliant job application
- Employee handbook, plus signature of receipt



Practical Considerations



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Practical Considerations

- Be prepared for your new employee
 - Work station
 - Computer, including e-mail and software
 - Tell reception staff
- Employee profile
- Direct deposit form

Topics to Cover

AGENDA

- 1.
- 2.
- 3.



Topics to Cover

- The five “W” questions:
 - Who
 - What
 - When
 - Where
 - Why
- Try to be interactive



What... are my benefits?

- Tell employees about insurance and financial benefit plans and include paperwork
- Don't forget other company perks, such as:
 - PTO policies
 - Discount programs
 - Flexwork
- Include swag

When can I...?

- Employees need to know when benefits kick in or when they can start using perks
- Cover any company holidays
- Outline pay policies



Why... do we do what we do?

- Company missions, values and goals
- Get job-specific, if you can
- Boosts engagement levels by giving a job more meaning
- Create a Company Mission video or use customer testimonials

Where...?

- Always give a tour, no matter what size your office is
- Provide a map of the area with restaurants, parking or other information to better orient new hires



Who...?

- Introduce to as many people as possible or practical
- Arrange a team lunch for the first day
- Schedule meetings with direct reports and direct supervisors
- Send out a new hire survey to personalize interactions and help break the ice

Evaluating Your Onboarding Program



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Evaluating Your Onboarding Program

- Encourage questions during onboarding
- Look at your turnover rate
- Schedule success check-ins with new hires at key dates to see how they're adapting
- Check in with managers to get their feedback on new hires

Final Notes

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Final Notes

- Best way to improve or create an onboarding program is to think back to your own first day
- Cover the five W questions: what, when, why, who and where
- Ensure you're following legal requirements and recommendations to protect your business

Thank you!

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