

BerniePortal Onboarding

Focus on people, not paperwork

**Onboarding with
BerniePortal allows HR to:**



Cut down on admin time



Eliminate paperwork



**Improve employee
onboarding experience**

BerniePortal Onboarding Key Features Include:

| | |
|----------------------------------|---|
| ✓ Applicant Tracking Integration | 3 |
| ✓ Intuitive Self-Service | 3 |
| ✓ Custom Documents | 4 |
| ✓ eSignatures | 4 |
| ✓ Automate Email Reminders | 5 |
| ✓ Warm Welcome | 5 |
| ✓ Made for Mobile | 6 |

Applicant Tracking Integration

You hired the top-talent you were searching for— why stop there? Seamlessly transition your new hire through the 3-step guided onboarding process, eliminating the redundancy for filling out the same information twice, all while providing them with the opportunity to be productive and happy team members beginning day one.

| Hire Documentation: Step 1 of 3 | | | |
|--|-------------------|--------------------|---------|
| | 1 | 2 | 3 |
| | VERIFY INFO | DOCUMENTATION | CONFIRM |
| <input checked="" type="radio"/> Hired | Bobby Boxer | Software Developer | |
| <input checked="" type="radio"/> Hired | Courtney Sinclair | Controller | Onboard |
| <input checked="" type="radio"/> Hired | Alex Ramsey | Account Manager | Decline |

| Hire Documentation: Step 1 of 3 | | |
|--|--|--|
| 1 | 2 | 3 |
| VERIFY INFO | DOCUMENTATION | CONFIRM |
| Personal Information | | |
| First Name: * | Middle Initial: | Last Name: * |
| <input type="text" value="Chris"/> | <input type="text"/> | <input type="text" value="Broussard"/> |
| Social security number: * | Confirm social security number: * | |
| <input type="text" value="111-11-1111"/> | <input type="text" value="111-11-1111"/> | |
| Gender: * | Date Of Birth * | |
| <input checked="" type="radio"/> Male <input type="radio"/> Female | <input type="text" value="12/12/1999"/> | |
| <input type="button" value="SAVE AND CONTINUE"/> | | |

Intuitive Self-Service

A guided 3-step process walks employees through easy-fill forms and e-sign-enabled processes making onboarding quick and easy.

Custom Documents

Your company is unique, which is why we give you the ability to upload your own employer-specific documents outside of the standard tax documents BerniePortal provides for you (W-4, W-9, I-9, State Withholding, and Direct Deposit). Examples of employer-specific documents include an employee handbook, policies and procedures, emergency contact form, etc.

Manage Categories

Drag your created categories to reorder. The order you decide here determines the order in which the employee will fill out paperwork during their onboarding process.

ADD CATEGORY

| | | |
|---|------------------------------|---|
| ⋮ | Broker Forms | ⚙ |
| ⋮ | Job Descriptions | ⚙ |
| ⋮ | Employee Agreement Forms | ⚙ |
| | W-4 | |
| | W-9 | |
| | State Withholding | |
| | I-9 | |
| | Direct deposit authorization | |

SAVE

CANCEL

Sign (use your mouse): *



Reset

I AGREE

BACK TO PREVIOUS STEP

eSignatures

With the same legal effect as traditional paper-based and handwritten signatures, new hires can legibly and legally e-sign onboarding documents faster allowing you to improve processes and remain compliant.

Onboarding paperwork

Who would you like to send a reminder to?

☒ Only Miles Davis

☐ All employees that need to complete onboarding paperwork

Message text

Hi Joe,
This is a reminder that you need to complete your onboarding paperwork by Friday!

-HR

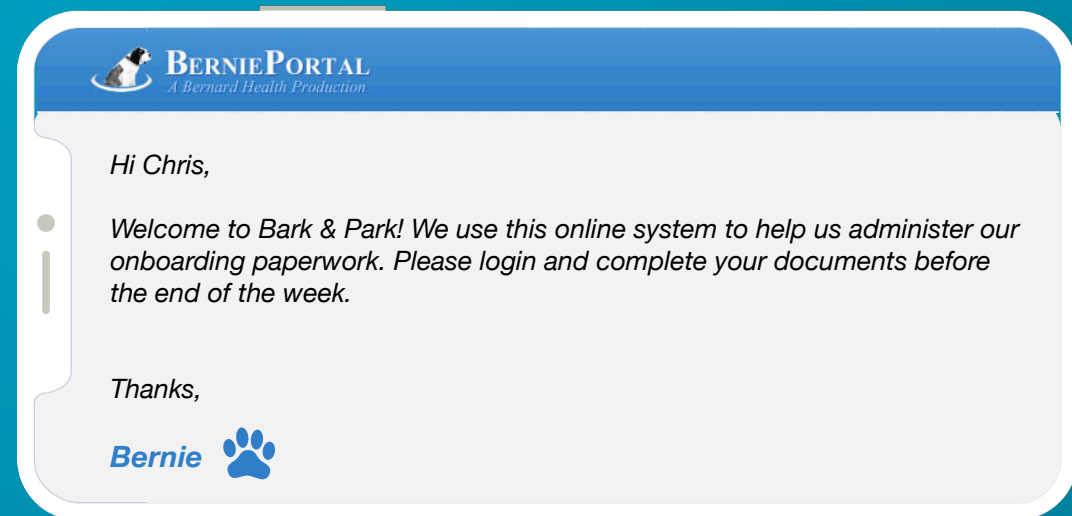
SEND REMINDER CANCEL

Automate Email Reminders

Chasing down employees to complete forms is officially a thing of the past! Automatically customize and send email reminders to employees who haven't completed their documents with increasing urgency as their first day approaches.

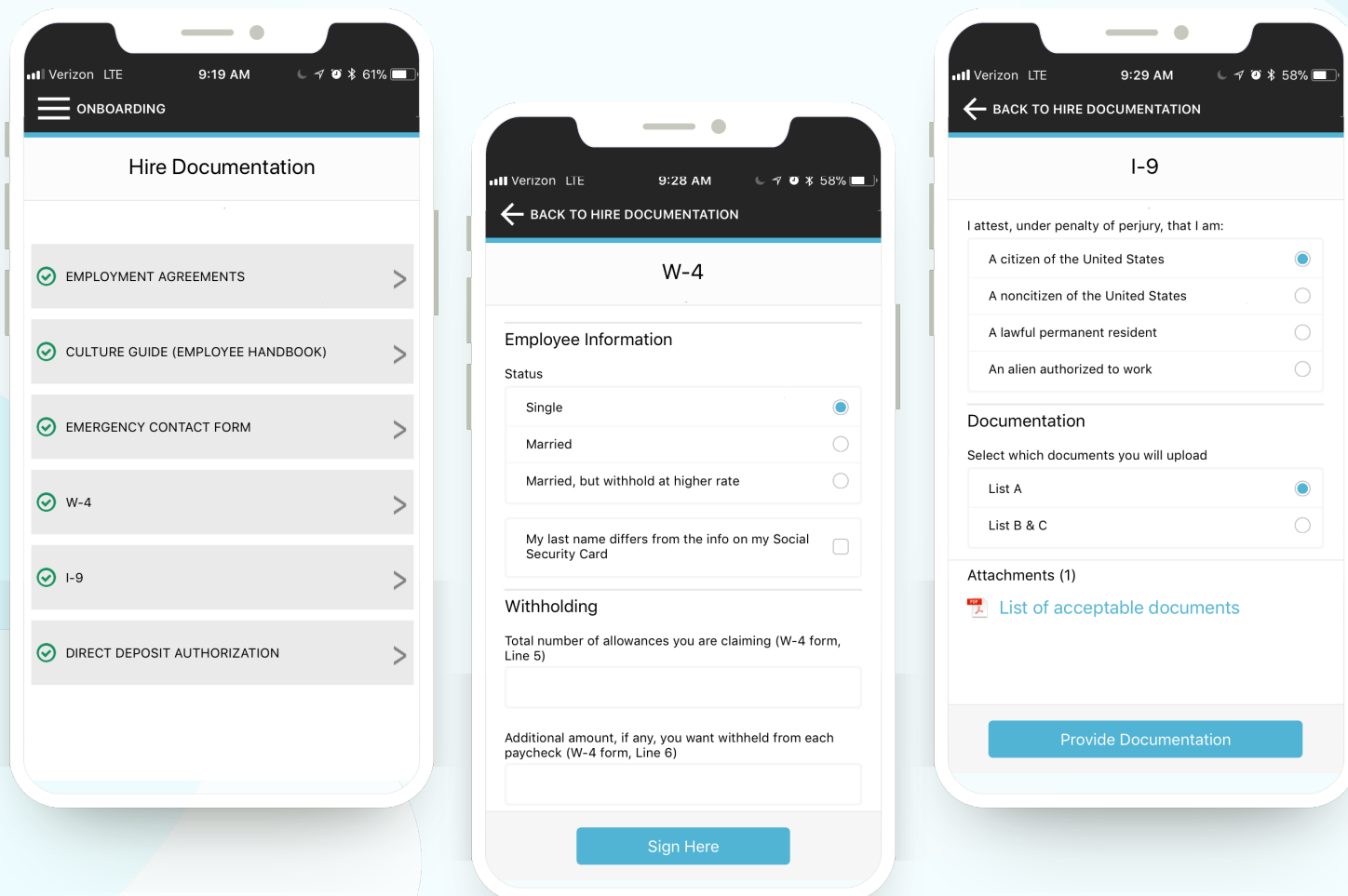
Warm Welcome

You've successfully onboarded your new hire into BerniePortal. With automated welcome emails, your employees can quickly and simply activate their accounts and complete the 3-step guided onboarding process before day one.



Made for Mobile

Today's modern workforce is constantly connected to their smartphones, that's why BerniePortal provides a mobile app designed for employee's to complete onboarding quickly and efficiently from any smart-enabled device.





With BerniePortal Onboarding you can simplify onboarding with online W-4s, W-9s, I-9s, and customizable forms.

Ready to learn more?

See a tour of BerniePortal's Onboarding feature today:

SEE TOUR