

Harmony HR - Setting Up an Onboarding Process

With new hires, there are tons of paperwork and admin work to be done. We recognize that each organization's onboarding process may be unique, so we've built Harmony's onboarding process to be flexible, yet streamlined.

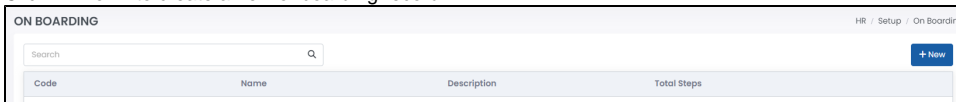
- [Pre-Requisites](#)
- [Creating a New Onboarding Record](#)
 - [Types of Onboarding Steps](#)
 - [Note](#)
 - [Acknowledgement](#)
 - [Personal Information](#)
 - [Direct Deposit Information](#)
 - [Tax Forms](#)
 - [Professional Memberships & Certificates](#)
- [Initiating a New Onboarding Process for a New Hire](#)
- [Reviewing a New Hire's Onboarding Process](#)

Pre-Requisites

- You have access to the Setup > Onboarding section of Harmony's HR module
- You have created the email template including the onboarding link
- You have mapped the email template to the correct onboarding notifications under Setup > Notifications

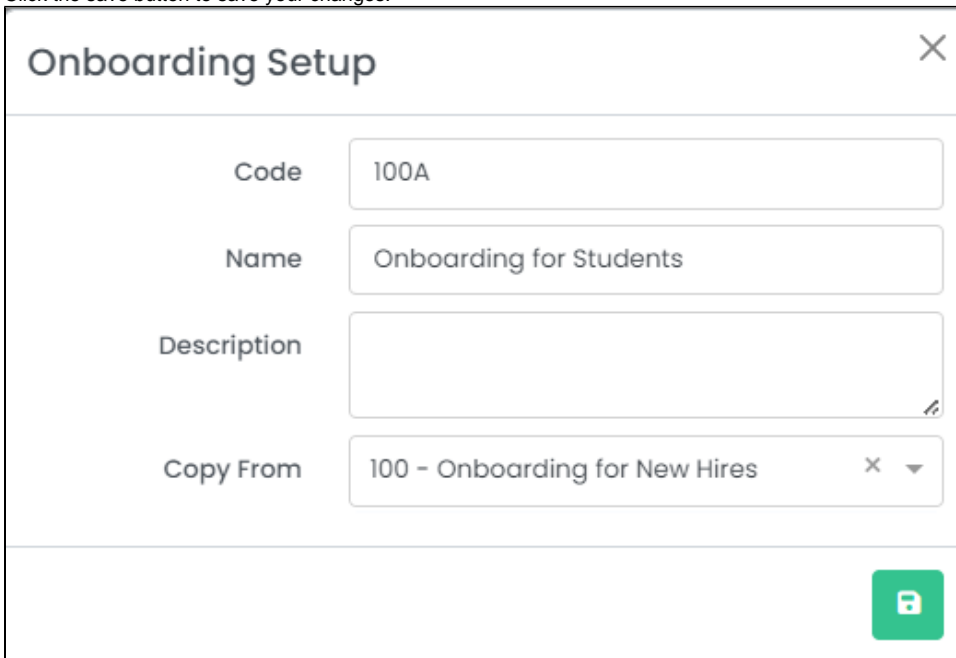
Creating a New Onboarding Record

1. In Harmony's Human Resources module, navigate to Setup > Onboarding.
2. Click **"+ New"** to create a new onboarding record.



A screenshot of the 'ON BOARDING' table in the HR Setup section. The table has columns for Code, Name, Description, and Total Steps. A search bar is at the top, and a '+ New' button is in the top right corner.

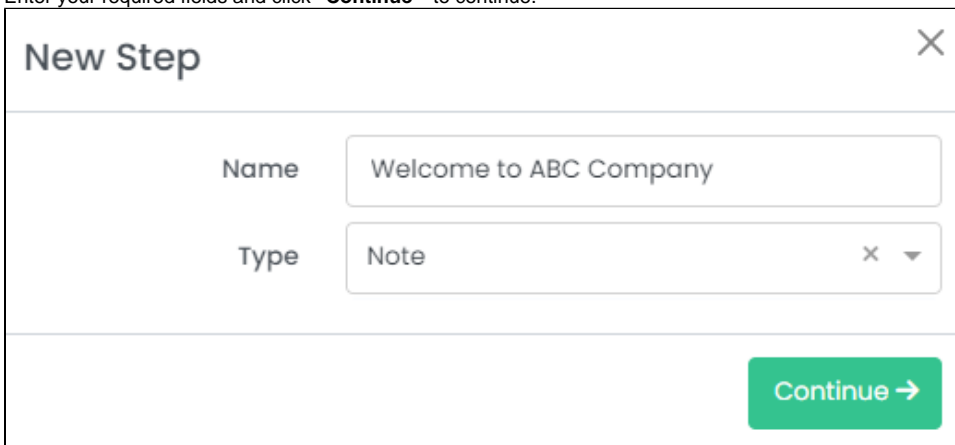
3. Enter the required fields.
 - a. **"Code"** refers to the unique ID for this onboarding process record.
 - b. **"Name"** refers to the name for this onboarding process record.
 - c. **"Description"** is an optional field for you to describe the onboarding process record.
 - d. **"Copy From"** allows you to copy the steps from an existing onboarding process record.
4. Click the save button to save your changes.



A screenshot of the 'Onboarding Setup' form. It has fields for Code (100A), Name (Onboarding for Students), Description (empty), and Copy From (100 - Onboarding for New Hires). A green save button is at the bottom right.

5. Steps for the onboarding process will be shown in the bottom part of the window. Click **"+ New"** to add a new step.
Tip: If you already have steps in the onboarding process, you can select one and click "Clone" to clone/duplicate it!

6. Enter your required fields and click **"Continue"** to continue.



The screenshot shows a 'New Step' dialog box. It has a title bar with a close button (X). Inside, there are two input fields: 'Name' with the text 'Welcome to ABC Company' and 'Type' with a dropdown menu showing 'Note'. At the bottom right is a green 'Continue' button with a right arrow.

- a. **"Name"** identifies the name of the step to be shown during the onboarding process.
- b. **"Type"** identifies the different type for this onboarding step. Depending on the type you select, different options will be available for you to select and the new hire will be able to fill out different things.
 - i. **'Note'** refers to a simple text or message to show to your new hire.
 - ii. **'Acknowledgement'** refers to a text or message that requires your new hire to acknowledge.
 - iii. **'Personal Information'** refers to the *Personal Information* section in the employee profile, such as their name, date of birth, social insurance/security number, and address.
 - iv. **'Direct Deposit Information'** refers to the employee's bank accounts, to be used for Payroll.
 - v. **'Tax Forms'** refers to the federal and provincial/state/territorial tax forms (e.g. W-4, TD-1) for your employees to fill out. These forms will be available to be pulled up in the Payroll module to update the employee's payroll-related information.
 - vi. **'Professional Memberships & Certificates'** refer to the joined memberships and acquired certificates that the employee may be a part of or have. This is directly related to the section of the same name in the employee's HR-related profile.
7. Enter additional fields as required. Take a look at the *Types of Onboarding Steps* section below for more information.
 - a. For any step (no matter which type), you can make this step required or mandatory for the new hire to complete. Otherwise, the new hire may ignore it or submit that step as blank.
8. You may want to preview the step prior to saving to ensure it is as expected. You can click the **"Preview"** button to preview.
9. Click the save button to save your changes to the step.
10. Repeat steps 5 through 9 for each step that you want to add to the onboarding process.
11. If you want to deactivate a step in the onboarding process record but not delete it, use the toggle in the list of steps to toggle the step on or off.

Note: As soon as the new hire begins their onboarding process, you cannot modify it unless you send a new one.
12. If you want to delete a step in the onboarding process record, select the step you want to delete and click the trashbin button to delete it.
13. Steps in the onboarding process can be reordered by dragging and dropping the hamburger button on the left side of the window (the icon that looks like three lines). The 'Summary' step will always be the last step of the onboarding wizard. This will provide a summary of all the fields that the new hire has filled. As such, you cannot reorder this step.
14. Click the save button to the onboarding process record itself to save your changes.

Onboarding Setup

Code

100A

Name

Onboarding for Students

Description

Steps

+ New

Step Name	Description	Status
≡ Welcome to ABC Company!	Welcome note for the new hire.	<input checked="" type="checkbox"/>
≡ Personal Information		
≡ Professional Memberships & Certifications		<input checked="" type="checkbox"/>
≡ Direct Deposit	Bank accounts for payroll.	<input checked="" type="checkbox"/>
≡ TD-1 (Federal)		<input checked="" type="checkbox"/>
≡ TD-1 (Provincial)		<input checked="" type="checkbox"/>
≡ Acknowledgement		<input checked="" type="checkbox"/>
Summary		

15. In the list of all onboarding records, click the three (3) dots for an onboarding process record and click **"Preview"** to preview the entire process.

ONBOARDING PREVIEW

← Back

This is a preview mode and showcases the employee's view of this config. Any changes you make will not be saved.

Next >

1 Welcome to ABC Company!

2 Personal Information

3 Direct Deposit

4 TD-1 (Federal)

5 TD-1 (Provincial)

6 Professional Memberships & Certifications

7 Acknowledgement

8 Summary

Welcome to ABC Company! Your onboarding instructions are included below, please follow the steps in the Onboarding wizard. Once you have completed a step, you can move onto the next step. Mandatory fields in each step are indicated with an asterisk (*), so please ensure that these are filled out. Optional fields can be filled out later. You can click on the "Next" button to proceed to the next step or "Previous" button to return to the previous step. Once your onboarding is completed and submitted, you will not be able to make changes.

Types of Onboarding Steps

Note

The 'Note' options refers to a simple message or text box that you can enter for your employees to preview, such as a welcome message.

Onboarding Step

X

Onboarding for Students

Note / Text

Preview

Clone

Step Name

Welcome to ABC Company!

Description

Welcome note for the new hire.

Text

B I U S “ ” < /> H₁ H₂ ≡ ≡≡ x₂ x² ≡≡ ≡≡ ¶ Normal ⇅ Normal ⇅

A A Sans Serif ⇅ ≡ T_x

Welcome to ABC Company! Your onboarding instructions are included below, please follow the steps in the Onboarding wizard. Once you have completed a step, you can move onto the next step. Mandatory fields in each step are indicated with an asterisk (*), so please ensure that these are filled out. Optional fields can be filled out later. You can click on the "Next" button to proceed to the next step or "Previous" button to return to the previous step. Once your onboarding is completed and submitted, you will not be able to make changes.

Acknowledgement

The 'Acknowledgement' option is very similar to the 'Note' option, in that it is also a body of text that you can enter, but you can also require the employee to acknowledge the text.

Onboarding Step

Onboarding for Students

Acknowledgement

Preview

Step Name

Acknowledgement

Description

Required step for new hire

☒

Text

It's important for us to get accurate information from you in order to build your employee profile with ABC Company. Please use the checkbox below to acknowledge that you've read these instructions and have provided accurate information during the onboarding process.

Acknowledgement Text

I acknowledge that the information I've provided in this onboarding process is accurate.

Personal Information

The 'Personal Information' option corresponds to personal information of the employee profile. You can select which fields that you want the new hire to complete, and identify if the field is required or not. Fields that the system requires, such as first name, will always be required and cannot be unselected to be optional for the new hire to complete.

Onboarding Step

Onboarding for Students

Personal Information

Preview

Step Name

Personal Information

Description

Use	Required	Use	Required	Use	Required
<input checked="" type="checkbox"/> First name	*	<input checked="" type="checkbox"/> Marital Status	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Ethnicity	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Middle name	<input type="checkbox"/>	<input checked="" type="checkbox"/> Home Phone	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Dietary Preferences	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Last name	*	<input checked="" type="checkbox"/> Cell Phone	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Allergies	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Title	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Personal Email	*	<input checked="" type="checkbox"/> Employee Contacts	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Gender	*	<input checked="" type="checkbox"/> Address	*	<input checked="" type="checkbox"/> Driver's License Information	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Date of Birth	*	<input checked="" type="checkbox"/> Country	*		
<input checked="" type="checkbox"/> Place of Birth	<input type="checkbox"/>	<input checked="" type="checkbox"/> Province	*		
<input checked="" type="checkbox"/> SIN	*	<input checked="" type="checkbox"/> City	*		
		<input checked="" type="checkbox"/> Postal Code	<input checked="" type="checkbox"/>		
		<input checked="" type="checkbox"/> Pronoun	<input checked="" type="checkbox"/>		

Direct Deposit Information

The 'Direct Deposit Information' option allows your new hire to enter their bank account information for Payroll. You may allow the new hire to enter more than one (1) bank account to be entered into Payroll. Please refer to the Payroll module for more information.

Onboarding Step

Onboarding for Students

Direct Deposit

Preview

Step Name

Direct Deposit

Description

Bank accounts for payroll.

Required step for new hire

☒

Allow multiple bank accounts

☒

Tax Forms

The 'Tax Forms' option allows you to upload a fillable PDF version of your federal or provincial/state/territorial tax form for your new hire to fill out. Completed tax forms will be shown in the Payroll module of Harmony for you to easily make changes if required. You can download the fillable PDF versions of your country and province/state/territory's tax form from the government websites.

Onboarding Step

Onboarding for Students

Tax Forms

Preview

Clone

Step Name

TD-1 (Federal)

Required step for new hire

Description

Acknowledgement Required

Form Name

TD1 (Federal)

Version

1

Year

2023

Form File

Drag and drop files or click here

TD1 (Federal)

Acknowledgement Text

I acknowledge that this TD-1 form is accurate as it will affect my income taxes.

Professional Memberships & Certificates

The 'Professional Memberships & Certificates' option allows your new hire to track any professional memberships that they are a part of, or any professional certificates that they have achieved that may be vital for their new role. This is directly related to the *Professional Memberships* section of the employee's HR profile.

Onboarding Step

Onboarding for Students

Professional Memberships & Certifications

Preview

Step Name

Professional Memberships & Certifications

Required step for new hire

Description

Allow Attachments

Instructions For Employees

Please add any professional memberships that you partake in, or any professional certifications required for your position.

Initiating a New Onboarding Process for a New Hire

1. In Harmony's Human Resources module, navigate to Setup > Onboarding.
2. For the onboarding process that you'd like to initiate, click the three (3) dots.
3. Select **'Invite New Hire'**.

100A

Onboarding for Students

8

Preview

Invite New Hire

4. Enter the **"Name"** and **"Email"** address for the new hire that you want to initiate the onboarding process for.
5. If you want to initiate the selected onboarding process for more than one new hire, click the **"+"** button.

Invite Employees: Onboarding for Students(100A)

Name

Email

+

-

1.

John Doe

john@test.com

Send

6. Click **"Send"** to send the invitation. Your new hire will receive the email with the onboarding link for them to complete.
Note: As soon as the new hire begins their onboarding process, you cannot modify it unless you send a new one.

Reviewing a New Hire's Onboarding Process

1. In Harmony's Human Resources module, navigate to Employees > Onboarding. A list of all new hires in the onboarding process will appear.
2. Select a record to view the progress.
3. Click the **"Resend Email"** button to resend the onboarding email if required. This will resend the onboarding invitation link to the new hire.
4. Once a new hire's onboarding process is initiated, the status will be 'Draft'. This is where the new hire will be able to enter information into the onboarding process.
5. Once a new hire's onboarding process is submitted, the status will change to 'Submitted'. The new hire can no longer add additional information to the onboarding process. The record must then be approved. Either the approver or the super administrative user can approve and add additional details to fully complete the employee profile, such as employee ID and start date.
6. Once the new hire's onboarding process is approved, the status will change to 'Approved' and the employee record will be created.