

WORKLIO

Welcome to Onboarding – What to Expect...

The onboarding portal is easy to use. However, for your convenience, included in this PDF are detailed instructions to answer questions that may come up during your onboarding process.

- **Onboarding Frequently Asked Questions Page** - A FAQ page with several frequently asked questions that will assist you through the onboarding process.
- Completing the new **W4 tax form** can be very confusing. Please take a look at the attached tip sheet document.
- Step-by-step instructions for setting up **Direct Deposit to multiple accounts**.
- **Employee Onboarding Instructions** – A step by step guide of the onboarding wizard you will follow to complete your personnel file. *(approx. 15 minutes to complete)*

ONBOARDING

Frequently Asked Questions

Email Invite – Q. I click on the link in the email, but it takes me to a handbook not onboarding. How do I access onboarding?

A. Once you receive the welcome email for onboarding, the first link will take you to the employee handbook. You will need to locate the blue button near the bottom of the email that says START.

Landing Page – Before Onboarding – Q. Are there any instructions to assist me through onboarding?

A. Yes, before you begin onboarding from the landing page please download the "INSTRUCTIONS FOR COMPLETING YOUR ONBOARDING PROCESS". These instructions include the following:

- Tip Sheet for completing the W4 Form.
- Direct Deposit to multiple accounts – a step-by-step guide.
- Employee onboarding instructions from beginning to end.

The link will be right below the START ONBOARDING PROCESS button. Please do not click this button until you have downloaded the instructions. You will do this by clicking where it says DOWNLOAD PDF DOCUMENT.

Step 1. Q. What if there is incorrect information on step 1 of the Employment Summary Approval?

A. If there is incorrect information such as a name, spelling, hourly rate, etc. Please use the REPORT WRONG DATA button at the bottom of the page. Please make sure to notate both what is incorrect and what the correct information should be in your note so that your employer does not need to reach out. This saves time for both you and your employer. You will not be able to move forward with onboarding until your employer corrects the information. If you move forward with the incorrect information listed all your documents will list the incorrect info. This means you will have to manually correct and submit a change form to us so that we can update your information in the system. You will know the information has been corrected when you receive another welcome email for onboarding.

Step 2. Q. Can I use a nick name or different name than what is on my legal documents?

A. You will need to use your full legal name. **For tax purposes your name needs to match what is listed on your current social security card.**

Step 5. Q. I have a job that requires me to drive do I need to include my driver's license number?

(OR)

Q. My employer asked me to include my driver's license, do I need to fill in that section on the form?

A. If your employer requires you to include your driver's license, please fill in the appropriate fields pertaining to the driver's license. Please note these fields are not required but filling in this information will save time, so your manager does not need to reach out to you after you have completed onboarding to obtain your DL number.

- Step 6.** Q. Am I required to setup an emergency contact on step 6 of onboarding?
A. Yes, you are always required to setup an emergency contact. Even though this does not show as a required field your employer will reach out to you if you do not fill in this field. Please use the check box next to SETUP EMERGENCY CONTACT. This will open additional fields where you can type in all the information pertaining to your emergency contact.
- Step 8.** Q. Can you assist me in filling out the W-4?
A. We are not allowed to give out any recommendations or advice on how to fill out the W-4. Please go step by step, read each section, and fill out accordingly. Other than that, we cannot assist you in any way with the W-4. There is also a tip sheet you can download near the top of the page.
- Step 9.** Q. I'm stuck on step 9, how do I go to the next page?
A. This page is the PDF viewer, from here you will need to click NEXT in red. It's near the top of the page just above the document you are reading. Once you have viewed all pages you can check the I DELACE box and sign the document. After you have completed that you will be able to click NEXT at the bottom of the web page.
- Step 10.** Q. How do I set up my direct deposit? What if I want to have more than 1 account and want a fixed amount/percentage in one and the rest in another account?
A. To setup direct deposit click ADD NEW BANK ACCOUNT. Unless you plan on having more than 1 account, we always recommend you use percentage instead of fixed amount and type in 100%. This ensures all money will go directly to that account. If you have more than 1 account you can either first put a fixed amount, for example \$100 dollars in 1 account. Then you would add the second account and use percentage. Put in 100%, this will ensure whatever is left after the \$100 goes to the first account, the rest will go to the second account. You can also put a percentage in the first account, for example 25%. Then setup the second account and use percentage again. Put in 100%, this will ensure whatever is left after the 25% goes to the first account, the rest will go to the second account.
- Step 12.** Q. Can I download the documents I viewed and signed?
A. Yes, you will have an opportunity in this step to download each document individually or all together. Please keep in mind if you DOWNLOAD ALL you will receive all documents within a ZIP file.

ONBOARDING

Tip Sheet for Completing the 2020 W-4 Form

Please use this Tip Sheet for completing the 2020 Form W-4. It offers helpful tips to complete the W-4 form located following this tip sheet. Whether you are a new hire, or you want to change your withholding, you must complete steps 1 and 5. Steps 2, 3, and 4 are only completed if certain criteria apply.

Note: This is not to be taken as tax advice. Since tax rules change over time and can vary for each person and household, please consult a CPA or tax advisor for specific guidance. Failing to properly complete the 2020 Form W-4 could result in you owing taxes.

5 key steps in the new Form W-4

Step 1: Enter Personal Information – **EVERYONE MUST COMPLETE**

This step must be completed by all employees. Please fill out your basic information: 1) Name; 2) Social Security number; 3) Address; 4) City/town, state, and ZIP; 5) Filing status. If an employee does not fill out the form, the employer is required to calculate their withholding as “Single” so the employer can withhold their taxes at the higher “Single” rate.

The image shows a portion of the 2020 Form W-4. The title is 'Form W-4 Employee's Withholding Certificate'. It includes instructions: 'Complete Form W-4 so that your employer can withhold the correct federal income tax from your pay.' and 'Give Form W-4 to your employer.' The form is for the year 2020. Section (a) is for 'First name and middle initial' and 'Last name'. Section (b) is for 'Social security number'. Section (c) is for 'Enter Personal Information' including 'Address', 'City or town, state, and ZIP code', and 'Filing status' with checkboxes for 'Single or Married filing separately', 'Married filing jointly (or Qualifying widow(er))', and 'Head of household'. Section (d) is for 'Write in your mailing address'. Below the form, four colored circles are labeled: (a) Enter your full name, (b) Enter your Social Security number, (c) Check your filing status, and (d) Write in your mailing address.

Step 2: Multiple Jobs or Spouse Works - **Complete Steps 2-4 ONLY if they apply to you; otherwise, skip to Step 5.**

This section addresses the “Two Earners / Multiple Jobs Worksheet”. Most commonly, this step is for anyone who has more than one job or is married filing jointly and whose spouse works. So most likely, these steps won't apply to you if you're single with only one job or you're married, and your spouse doesn't work.

However, it is your responsibility to understand and properly apply your personal situation as it can affect your tax balance owed at time of tax filing. Use the provided links or consult your CPA to ensure you understand your options.

Within the Employee's Withholding Certificate packet, it provides instructions on who needs to complete Steps 2-4 and who can skip to Step 5. Please review this section closely to ensure you are properly completing this step.

Checking box 2(c) tells your employer that you have multiple jobs. If you don't want to disclose that fact, don't check the box.

If you skip steps 2-4, you must complete step 5.

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 online estimator, 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 2020 Form W-4 for all other jobs. If you (or your spouse) have self-employment income, including as an independent contractor, use the estimator.

Complete Steps 3-4(b) on Form W-4 for only ONE of these jobs. Leave those steps blank for the other jobs. (Your withholding will be most accurate if you complete Steps 3-4(b) on the Form W-4 for the highest paying job.)

In this step, the form notes that individuals with multiple jobs should complete Form W-4 with the information from their *highest-paying* job. That should result in the most accurate outcome. If you work more than one job, steps 3 through 4b should only be completed on one W-4 form.

For step 2, employees only need to complete option (a), (b), or (c). Options (a) and (b) will take employees away from the form itself, while option (c) can be done right on the form.

The IRS has stated that option (a) will give employees the most accuracy and privacy of the three since the new withholding estimator will compute all the relevant entries for the form. Option (b) also provides accuracy but requires manual work (see “Worksheet” Section below for more details), and (c) is the least accurate since it assumes the jobs have similar pay, but it’s the easiest to complete.

Step 3: Claim Dependents - Complete Steps 2-4 ONLY if they apply to you; otherwise, skip to Step 5

This section determines your eligibility for the child tax credit. It’s a relatively simple step to complete:

Step 3: Claim Dependents

If your income will be \$200,000 or less (\$400,000 or less if married filing jointly):

| | | |
|--|----|------|
| Multiply the number of qualifying children under age 17 by \$2,000 | \$ | |
| Multiply the number of other dependents by \$500 | \$ | |
| Add the amounts above and enter the total here | | 3 \$ |

Number of kids under the age of 17 x \$2,000
 Number of other dependents x \$500
 The sum

The TCJA changed the law so more people would qualify for the child tax credit. Single taxpayers with an income of \$200,000 or less (\$400,000 if married filing jointly) are now eligible. Employees should pay attention to the definitions in [IRS Publication 972 – Child Tax Credit](#) if they’re looking to claim the credit.

Your number of qualifying children under age 17 multiplied by \$2,000 will go into the first box. The number of other dependents multiplied by \$500 will go in the second box. The sum of those two numbers will go on line 3.

Step 4: Other Adjustments - Complete Steps 2-4 ONLY if they apply to you; otherwise, skip to Step 5

Step 4 (optional): Other Adjustments

| | |
|--|---------|
| (a) Other income (not from jobs). If you want tax withheld for other income you expect this year that won't have withholding, enter the amount of other income here. This may include interest, dividends, and retirement income | 4(a) \$ |
| (b) Deductions. If you expect to claim deductions other than the standard deduction and want to reduce your withholding, use the Deductions Worksheet on page 3 and enter the result here | 4(b) \$ |
| (c) Extra withholding. Enter any additional tax you want withheld each pay period | 4(c) \$ |

(a) Additional income
 (b) Itemized deductions
 (c) Extra withholding

This optional section is for various things that an employee may want to account for when considering their withholding. These areas include:

- **(a): Other income (not from jobs).** Additional income that might *not* be subject to withholding, like dividends or retirement income.
- **(b): Deductions.** This line is for deductions *other* than the standard deduction. This includes all itemized deductions like mortgage interest and charitable contributions minus the standard deduction. Remember that, in general, the standard deduction reduces a taxpayer's adjusted gross income to arrive at taxable income. The greater of the standard deduction or itemized deductions will help reduce the amount of tax due. The [2020 standard deduction](#) is \$24,800 for married taxpayers filing jointly; \$12,400 for single and married filing separately taxpayers; \$18,650 for those filing as head of household.
- **(c): Extra withholding.** Any extra withholding that the employee would like to withhold each pay period

Step 5: Sign the form - EVERYONE MUST COMPLETE

Sign the form and you are done. Keep in mind that if you don't sign the form, it's invalid. That means your employer will disregard your new W-4 selections and withholding, and instead calculate your withholding as "Single."

Please refer to the following worksheets ONLY if you have multiple jobs or are Married and your spouse works:

- **Multiple Jobs Worksheet**
- **The new tax withholding estimator**

Please refer to the following worksheets ONLY if you have multiple jobs or are Married and your spouse works

Further understanding for the new "Worksheets" on Form W-4

Note: This is not to be taken as tax advice. Since tax rules change over time and can vary for each person and household, please consult a CPA or tax advisor for specific guidance. Failing to properly complete the 2020 Form W-4 could result in you owing taxes.

Multiple Jobs Worksheet

If you choose option b in Step 2, you will need to complete the Multiple Jobs worksheet. According to the IRS, this worksheet is less accurate than the tax estimator, but it provides the maximum amount of privacy.

Line 1

Line 1 is for anyone who has two jobs or is filing jointly with a spouse who also works.

Using the tables on page four, find the wages or salary for the "Higher Paying Job" in the column on the left (see below) and cross reference it with the amount of wages or salary from the "Lower Paying Job" in the columns moving left to right.

| Higher Paying Job Annual Taxable Wage & Salary | Married Filing Jointly or Qualifying Widow(er) | | | | | | | | | | | | | | | |
|--|--|-------------------|-------------------|-------------------|-------------------|-------------------|-------------------|-------------------|-------------------|-------------------|---------------------|---------------------|---------------------|---------------------|---------------------|---------------------|
| | Lower Paying Job Annual Taxable Wage & Salary | | | | | | | | | | | | | | | |
| | \$0 - 9,999 | \$10,000 - 19,999 | \$20,000 - 29,999 | \$30,000 - 39,999 | \$40,000 - 49,999 | \$50,000 - 59,999 | \$60,000 - 69,999 | \$70,000 - 79,999 | \$80,000 - 89,999 | \$90,000 - 99,999 | \$100,000 - 109,999 | \$110,000 - 120,000 | \$120,000 - 130,000 | \$130,000 - 140,000 | \$140,000 - 150,000 | \$150,000 - 160,000 |
| \$0 - 9,999 | \$0 | \$220 | \$850 | \$900 | \$1,020 | \$1,020 | \$1,020 | \$1,020 | \$1,020 | \$1,210 | \$1,870 | \$1,870 | \$1,870 | \$1,870 | \$1,870 | \$1,870 |
| \$10,000 - 19,999 | 220 | 1,220 | 1,900 | 2,100 | 2,220 | 2,220 | 2,220 | 2,220 | 2,220 | 2,410 | 3,410 | 4,070 | 4,070 | 4,070 | 4,070 | 4,070 |
| \$20,000 - 29,999 | 850 | 1,900 | 2,730 | 2,930 | 3,050 | 3,050 | 3,050 | 3,050 | 3,240 | 4,240 | 5,240 | 5,900 | 5,900 | 5,900 | 5,900 | 5,900 |
| \$30,000 - 39,999 | 900 | 2,100 | 2,930 | 3,130 | 3,250 | 3,250 | 3,440 | 4,440 | 5,440 | 6,440 | 7,100 | 7,100 | 7,100 | 7,100 | 7,100 | 7,100 |
| \$40,000 - 49,999 | 1,020 | 2,220 | 3,050 | 3,250 | 3,370 | 3,370 | 4,570 | 5,570 | 6,570 | 7,570 | 8,220 | 8,220 | 8,220 | 8,220 | 8,220 | 8,220 |
| \$50,000 - 59,999 | 1,020 | 2,220 | 3,050 | 3,250 | 3,370 | 3,370 | 4,570 | 5,570 | 6,570 | 7,570 | 8,220 | 8,220 | 8,220 | 8,220 | 8,220 | 8,220 |
| \$60,000 - 69,999 | 1,020 | 2,220 | 3,050 | 3,440 | 4,570 | 5,570 | 6,570 | 7,570 | 8,570 | 9,570 | 10,220 | 10,220 | 10,220 | 10,220 | 10,220 | 10,220 |
| \$70,000 - 79,999 | 1,020 | 2,220 | 3,240 | 4,440 | 5,570 | 6,570 | 7,570 | 8,570 | 9,570 | 10,570 | 11,220 | 11,220 | 11,220 | 11,220 | 11,220 | 11,220 |
| \$80,000 - 89,999 | 1,060 | 3,260 | 5,090 | 6,290 | 7,420 | 8,420 | 9,420 | 10,420 | 11,420 | 12,420 | 13,260 | 13,260 | 13,260 | 13,260 | 13,260 | 13,260 |
| \$100,000 - 149,999 | 1,870 | 4,070 | 5,900 | 7,100 | 8,220 | 9,320 | 10,520 | 11,720 | 12,920 | 14,120 | 14,980 | 15,180 | 15,180 | 15,180 | 15,180 | 15,180 |
| \$150,000 - 239,999 | 2,040 | 4,440 | 6,470 | 7,870 | 9,190 | 10,390 | 11,590 | 12,790 | 13,990 | 15,190 | 16,050 | 16,250 | 16,250 | 16,250 | 16,250 | 16,250 |
| \$240,000 - 259,999 | 2,040 | 4,440 | 6,470 | 7,870 | 9,190 | 10,390 | 11,590 | 12,790 | 13,990 | 15,220 | 17,170 | 18,170 | 18,170 | 18,170 | 18,170 | 18,170 |
| \$260,000 - 279,999 | 2,040 | 4,440 | 6,470 | 7,870 | 9,190 | 10,390 | 11,590 | 13,120 | 15,120 | 17,120 | 18,770 | 19,770 | 19,770 | 19,770 | 19,770 | 19,770 |
| \$280,000 - 299,999 | 2,040 | 4,440 | 6,470 | 7,870 | 9,190 | 10,720 | 12,720 | 14,720 | 16,720 | 18,720 | 20,370 | 21,370 | 21,370 | 21,370 | 21,370 | 21,370 |
| \$300,000 - 319,999 | 2,040 | 4,440 | 6,470 | 8,200 | 10,320 | 12,320 | 14,320 | 16,320 | 18,320 | 20,320 | 21,970 | 22,970 | 22,970 | 22,970 | 22,970 | 22,970 |
| \$320,000 - 364,999 | 2,720 | 5,920 | 8,750 | 10,950 | 13,070 | 15,070 | 17,070 | 19,070 | 21,290 | 23,590 | 25,540 | 26,840 | 26,840 | 26,840 | 26,840 | 26,840 |
| \$365,000 - 524,999 | 2,970 | 6,470 | 9,600 | 12,100 | 14,530 | 16,830 | 19,130 | 21,430 | 23,730 | 26,030 | 27,980 | 29,280 | 29,280 | 29,280 | 29,280 | 29,280 |
| \$525,000 and over | 3,140 | 6,840 | 10,170 | 12,870 | 15,500 | 18,000 | 20,500 | 23,000 | 25,500 | 28,000 | 30,150 | 31,650 | 31,650 | 31,650 | 31,650 | 31,650 |

At the intersection of these two amounts is the figure you will enter on line 1.

Note that the screenshot above is the table for taxpayers who are *married filing jointly* or *qualifying widow(er)*. There is a separate table for single and married filing separately taxpayers and yet another separate table for taxpayers filing as head of household. Be sure you're using the right table.

Form W-4 (2020) Page 3

Step 2(b) – Multiple Jobs Worksheet (Keep for your records.)

If you choose the option in Step 2(b) on Form W-4, complete this worksheet (which calculates the total extra tax for all jobs) on **only ONE** Form W-4. Withholding will be most accurate if you complete the worksheet and enter the result on the Form W-4 for the highest paying job.

Note: If more than one job has annual wages of more than \$120,000 or there are more than three jobs, see Pub. 505 for additional tables; or, you can use the online withholding estimator at www.irs.gov/W4App.

- Two jobs.** If you have two jobs or you're married filing jointly and you and your spouse each have one job, find the amount from the appropriate table on page 4. Using the "Higher Paying Job" row and the "Lower Paying Job" column, find the value at the intersection of the two household salaries and enter that value on line 1. Then, skip to line 3. 1 \$
- Three jobs.** If you and/or your spouse have three jobs at the same time, complete lines 2a, 2b, and 2c below. Otherwise, skip to line 3.
 - Find the amount from the appropriate table on page 4 using the annual wages from the highest paying job in the "Higher Paying Job" row and the annual wages for your next highest paying job in the "Lower Paying Job" column. Find the value at the intersection of the two household salaries and enter that value on line 2a. 2a \$
 - Add the annual wages of the two highest paying jobs from line 2a together and use the total as the wages in the "Higher Paying Job" row and use the annual wages for your third job in the "Lower Paying Job" column to find the amount from the appropriate table on page 4 and enter this amount on line 2b. 2b \$
 - Add the amounts from lines 2a and 2b and enter the result on line 2c. 2c \$
- Enter the number of pay periods per year for the highest paying job. For example, if that job pays weekly, enter 52; if it pays every other week, enter 26; if it pays monthly, enter 12, etc. 3
- Divide the annual amount on line 1 or line 2c by the number of pay periods on line 3. Enter this amount here and in **Step 4(c)** of Form W-4 for the highest paying job (along with any other additional amount you want withheld). 4 \$

Line 2

Line 2 is for someone who has three total jobs on their own or with a spouse.

Line 2a is for the two *highest-paying* jobs. Again, find the wages or salary for the highest paying job in the column on the left and the wages or salary for the second-highest across the top. The figure at the intersection of those two figures will go on line 2a.

For **line 2b**, the wages and salaries for the two highest-paying jobs need to be added together and found in the column on the left. The wages and salaries for the third job will be found in the row across the top of the table. The value at the intersection of those two figures will go on line 2b. The sum of lines 2a and 2b goes on line 2c.

Line 3

Lines 3 and 4 apply to everyone who chooses to fill out the Multiple Jobs worksheet.

Line 3 is the number of pay periods per year for the highest-paying job. For example, if that job pays weekly, then 52 goes on line 3. If the job pays bi-monthly, then 24 should be entered.

Line 4

Line 4 simply divides the amount on either line 1 or 2c by the number of pay periods on line 3. It's the amount that's provided in step 4c.

Deductions worksheet

The deductions worksheet is for anyone who plans to itemize deductions. Since the TCJA increased the standard deduction, way fewer people will itemize their deductions. Many high-earners will still itemize, however, so proceed accordingly.

For 2020, if you believe your itemized deductions will exceed \$12,200 (if you're single or married filing separate), \$24,400 (if you're married filing jointly), or \$18,350 (if you're the head of household), you should consider filling out the deductions worksheet.

| Step 4(b)—Deductions Worksheet (Keep for your records.) | | |
|---|--|------|
| 1 | Enter an estimate of your 2020 itemized deductions (from Schedule A (Form 1040 or 1040-SR)). Such deductions may include qualifying home mortgage interest, charitable contributions, state and local taxes (up to \$10,000), and medical expenses in excess of 10% of your income | 1 \$ |
| 2 | Enter: $\left\{ \begin{array}{l} \bullet \$24,800 \text{ if you're married filing jointly or qualifying widow(er)} \\ \bullet \$18,650 \text{ if you're head of household} \\ \bullet \$12,400 \text{ if you're single or married filing separately} \end{array} \right\}$ | 2 \$ |
| 3 | If line 1 is greater than line 2, subtract line 2 from line 1. If line 2 is greater than line 1, enter "-0-" | 3 \$ |
| 4 | Enter an estimate of your student loan interest, deductible IRA contributions, and certain other adjustments (from Schedule 1 (Form 1040 or 1040-SR)). See Pub. 505 for more information | 4 \$ |
| 5 | Add lines 3 and 4. Enter the result here and in Step 4(b) of Form W-4 | 5 \$ |

Anyone filling out this worksheet should have their prior-year tax return handy to help get a good idea of what those deductions might be.

Please refer to the following worksheets ONLY if you have multiple jobs or are Married and your spouse works

The new tax withholding estimator

For those that want to use the tax withholding estimator, we recommend checking out the IRS's new [withholding estimator](#).

Note: This is not to be taken as tax advice. Since tax rules change over time and can vary for each person and household, please consult a CPA or tax advisor for specific guidance. Failing to properly complete the 2020 Form W-4 could result in you owing taxes.

If you're interested in using the estimator, you should have the following:

- **Your most recent pay stub.** It should include the amount of federal income tax withheld so far in the current tax year (2019).
- **A completed copy of your most recent tax return.** It will help with estimating income and other items for the current tax year.

It's important for anyone using the estimator to know that it will only be as accurate as the information entered. If you throw in a "best guess" for the requested information, the result will not be as precise.

The withholding estimator will provide an approximation of what someone's tax liability will be for their tax return and whether their current withholding is enough to meet that obligation. Depending on a person's situation, this information may cause them to make changes to their W-4.

The IRS recommends that taxpayers with the following profiles check their withholding:
Two-income families.

- People with two or more jobs at the same time or who only work for part of the year.
- People with children who claim credits like the child tax credit.
- People who itemized deductions in the previous tax year.
- People with high incomes and more complex tax returns.
-

The new Form W-4 doesn't have to be confusing. Hopefully, this guide and collection of W-4 resources will help you avoid any surprises at tax time.

Lastly, here is a [video](#) we found helpful in completing the new 2020 Form W-4.

Setting Up Direct Deposit to Multiple Accounts During Your Onboarding Process Instructions ***Net Pay Allocation***

Each paycheck can be split during multiple bank accounts. You can allocate a **flat** dollar or a **percentage** of your paycheck.

If you have more than one account to set up, it is best to add the **flat** amounts first, in priority order. **To allocate the remainder of your check, add this account last and set it to 100%.**

Priority order of accounts entered is critical, but the last account is most important. The system will allocate the remainder of the paycheck to the last account in the list.

To change the priority order of accounts entered, click on **Prioritize** at the top of the page to reorganize the priority order. Here's an example of an employee who wants to allocate their paycheck to five different accounts.

This employee wants to allocate **the remainder** of their paycheck to a different account than those previously entered. So, they would enter something **like this**:

| Priority | Account | Amount | Type | Comments |
|----------|------------|--------|---------|-----------|
| 1 | Savings 1 | \$200 | Flat | |
| 2 | Savings 2 | \$50 | Flat | |
| 3 | Checking 1 | 10% | Percent | |
| 4 | Checking 2 | 15% | Percent | |
| 5 | Checking 3 | 100% | Percent | Remainder |

Please see next page easy step-by-step instructions.

1. To begin, click **Add New Bank Account**, then click **Next**.

Split Paychecks

Each paycheck can be split between multiple bank accounts. Add an account using "Add New Bank Account" link.
 Order in the table below drives the priority of deductions from the net pay. You can change the order using the "Prioritize" link.
 If the sum of all net pay allocations doesn't equal 100% of the net pay, the remainder will be issued as a live check.

[+ Add New Bank Account](#) | Search [Select Columns](#)

| Actions | Account Type | Account Number | Routing Number | Account Holder Name | Amount | Percent |
|---------|--------------|----------------|----------------|---------------------|--------|---------|
| No data | | | | | | |

2. Add your first account and click **Save**

Add Bank Account

ACCOUNT DETAILS

Account Type

Account Number | ⓘ

Routing Number | ⓘ

Account Holder Name

ALLOCATION DETAILS

Pay Into This Account

Amount \$

3. Repeat the process for each additional account you want to set up.

4. Click Prioritize if you need to reorganize the Priority Order of your accounts.

[+ Add New Bank Account](#) | [↑↓ Prioritize](#)

| Actions | Account Type |
|---|--------------|
| Edit Remove | Savings |
| Edit Remove | Checking |

20 50 100

5. When done, click Next.



SinglePoint Outsourcing

worklio

**EMPLOYEE
ONBOARDING -
PHASE 3**

There are four steps to the Onboarding process for hiring a new employee:

Phase 1 - Administration completes required forms

Phase 2 - Administration creates the new-hire employee file

Phase 3 - The new-hire employee fills their file with information

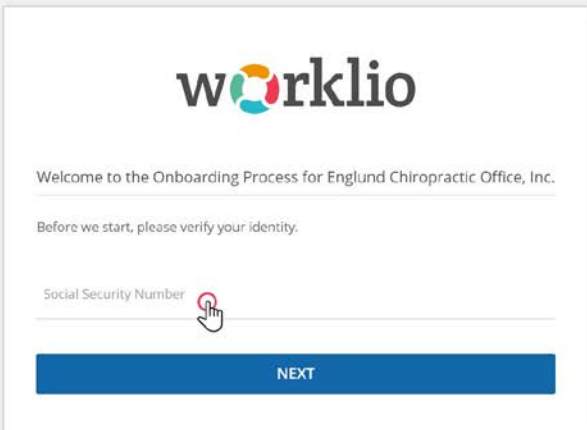
Phase 4 - Administration verifies the new-hire information

Onboarding - Phase 3

The third phase of the Onboarding process is a multi-step wizard that the new-hire employee will follow in order to fill their personnel file. This document shows the complete 14-step Employee Onboarding wizard. Not every step is required. The number of steps depends upon the settings in the Onboarding Template. Regardless the number of steps, the order is the same.

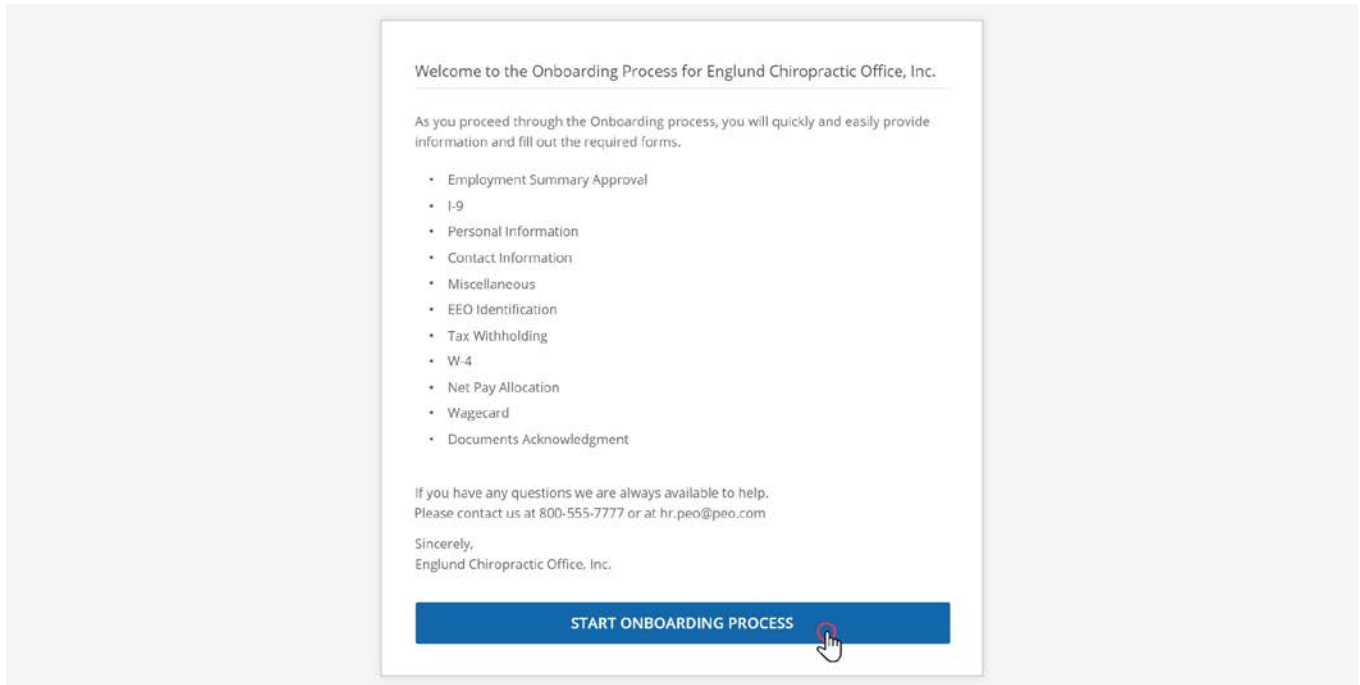
The new-hire employee will receive the Invitation Email.

The new-hire employee must verify who they are with their Social Security Number.



The screenshot displays the Worklio onboarding interface. At the top is the Worklio logo. Below it, the text reads: "Welcome to the Onboarding Process for Englund Chiropractic Office, Inc." followed by "Before we start, please verify your identity." The main input field is labeled "Social Security Number" and contains a red cursor icon. At the bottom of the form is a blue button labeled "NEXT".

If there is a problem, an email can be sent to Administration. Click "Report Issue" and enter information that will be sent. If the SSN is correct, the new-hire employee will continue to the Landing Page.



The Employee Onboarding wizard will take 15 to 20 minutes. Identification paperwork and, if setting up direct deposits, banking information will be necessary. The wizard can be stopped at any time and resumed later.

Click **START ONBOARDING PROCESS**.

Employment Summary (1/14)

Employee Onboarding / Employment Summary Approval (1/14)

1 2 3 4 5 6 7 8 9 10 11 12 13 14

Please review your employment details

EMPLOYEE INFO

First Name: Roy
Last Name: Pike
Social Security Number: ***-**-4299 [Unmask](#)

GENERAL EMPLOYMENT INFO

Start Date: 04/01/2019
Termination Date: -

POSITION INFO

Position:
Home Division (Default):
Work Location (Default): Main Office
Department:
Report to:

COMPENSATION

Employment Type: Regular Full-Time
Compensation Type: Salaried
Pay Period: 0
Worker Type: Non-Exempt
Compensable Hours: 40.00
Amount: ***** [Unmask](#)

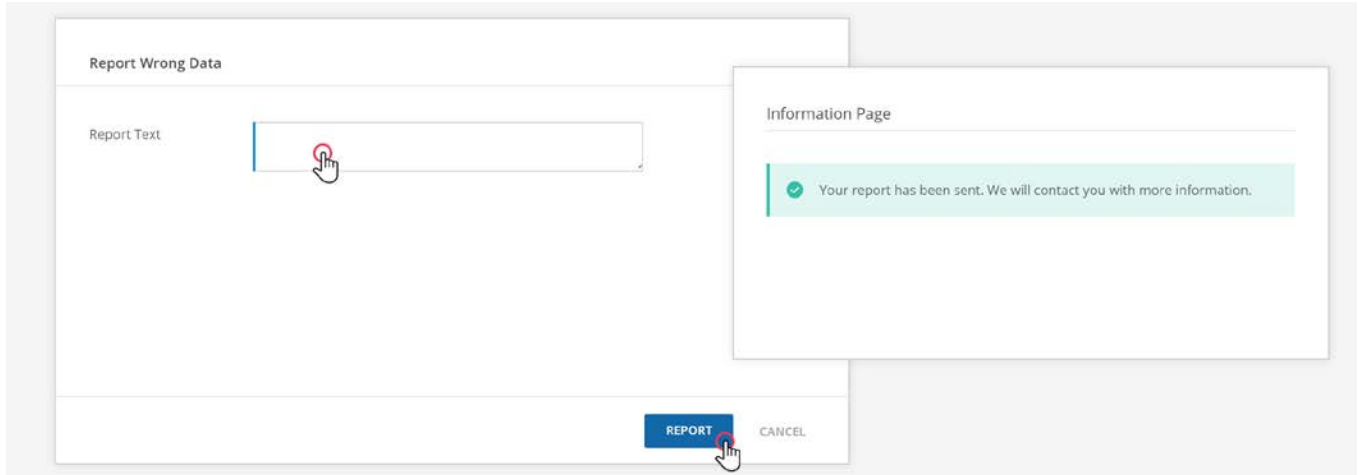
REPORT WRONG DATA **APPROVE AND CONTINUE** CLOSE

The first step of the Employee Onboarding wizard is to confirm the information that was entered by the Administrator, including General Employment Information, Position Information and Compensation.

APPROVE AND CONTINUE will move the new-hire employee to the next step.

CANCEL ends the Onboarding process.

REPORT WRONG DATA gives the new-hire employee a way to communicate an error to management.



An email with the error message will be sent to the Administrator. The Onboarding process is suspended until the situation is resolved.

I-9 (2/14)

The instructions for Form I-9 are available for download.

The new-hire employee must check the box to attest that they are aware that Federal law provides for imprisonment and/or fines for false statements or the use of false documents in connection with the completion of the form. Then, they must complete the information for the I-9 form.

Employee Onboarding / I-9 (2/14)

(PDF, ~500KB)
Download Instructions For Form I-9

Attest, That
I am aware that Federal law provides for imprisonment and/or fines for false statements or use of false documents in connection with the completion of this form.

PERSONAL INFORMATION

Social Security Number: ***.**-5516 | Unmask
Date Of Birth: MM/DD/YYYY
First Name: Roy N.
Last Name: Pike
Middle Name:
Other Last Names User (If Any):

CONTACT INFORMATION

Address:
Apartment Number:
City Or Town:
State:
Zip Code:
E-mail Address:
Phone Number: () - -

ATTESTATION

A Citizen Of The United States
An individual is a United States citizen by birth or by naturalization.

A Noncitizen Of The United States
An individual born in American Samoa, certain former citizens of the former Trust Territory of the Pacific Islands, and certain children of noncitizen nationals born abroad.

A Lawful Permanent Resident
An individual who is not a U.S. citizen and who resides in the United States under legally recognized and lawfully recorded permanent residence as an immigrant. This term includes conditional residents. Asylees and refugees should not select this status, but should instead select "An Alien authorized to work".

An Alien Authorized To Work
An individual who is not a citizen or national of the United States, or a lawful permanent resident, but is authorized to work in the United States.

SIGNATURE

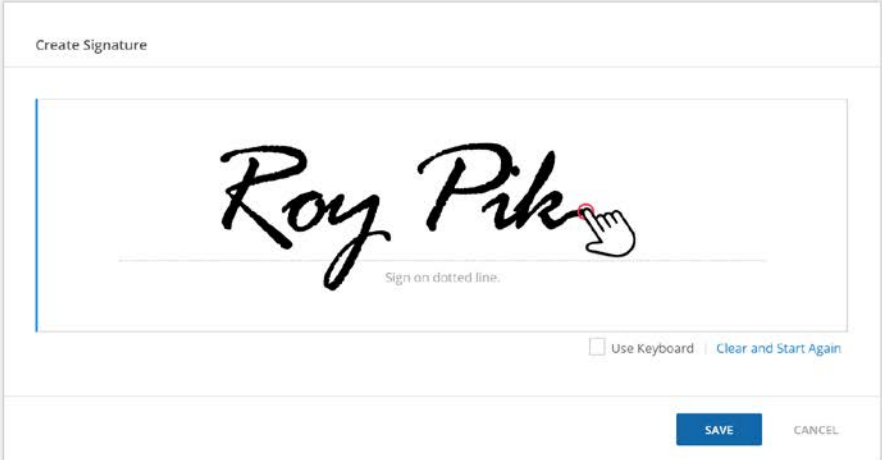
I Declare
The parties agree that this agreement may be electronically signed. The parties agree that the electronic signatures appearing on this agreement are the same as handwritten signatures for the purposes of validity, enforceability, and admissibility.

Create Signature

BACK NEXT CANCEL

The I-9 form must be signed.

- If the new-hire employee would like to sign the form by hand, they should click **NEXT** to move forward in the Onboarding process. The signature will be added later.
- If the new-hire employee would like to sign the form electronically, they must mark the "I Declare" checkbox to make the subsequent signature valid. Click "Create Signature". The signature can be made with a mouse. Or check Use Keyboard to type a valid signature.



The screenshot displays a 'Create Signature' window. At the top, the title 'Create Signature' is visible. The main area contains a signature 'Roy Pike' written in a cursive font on a dotted line. Below the signature, the text 'Sign on dotted line.' is present. At the bottom of the window, there is a checkbox labeled 'Use Keyboard' and a link 'Clear and Start Again'. In the bottom right corner, there are two buttons: 'SAVE' (highlighted in blue) and 'CANCEL'.

I-9 Certification (3/14)

The screenshot shows a progress bar at the top with 14 steps. Step 3 is highlighted in blue, indicating the current step. Below the progress bar, the text reads "Employee Onboarding / I-9 Certification (3/14)". Underneath, the heading "ATTESTATION" is followed by the instruction "I attest, under penalty of perjury, that". There are two radio button options: "I Did Not Use Preparer Or Translator" (which is selected) and "A preparer(s) and/or translator(s) assisted the employee in completing Section 1 - Employee Information And Attestation". At the bottom right, there are three buttons: "BACK", "NEXT" (highlighted in blue), and "CANCEL".

The new-hire employee must attest, under penalty of perjury, that they either

- Did not use a preparer or translator, or
- Did use a preparer(s) and/or translator(s) to complete Section 1 - Employee Information and Attestation

If a preparer and/or translator was used, they must verify their assistance.

Employee Onboarding

ATTESTATION

I Attest, Under Penalty Of Perjury, That

I Did Not Use Preparer Or Translator

A Preparer(s) And/Or Translator(s) Assisted The Employee In Completing Section 1 - Employee Information And Attestation

LIST OF PREPARERS/TRANSLATORS

[+ Add New](#) | Search

| Actions | First Name | Last Name |
|---------|------------|-----------|
| No data | | |

20 50 100 Page 1 of 1 (0 items)

BACK NEXT CANCEL

Click "Add New" to create the entry for the preparer and/or translator.

Add Preparer Or Translator Certification

First Name

Last Name

Address

City Or Town

Country

I Attest, Under Penalty Of Perjury, That
Under penalties of perjury, I declare that I have assisted in the completion of Section 1 of this form and that to the best of my knowledge the information is true and correct.

I Declare
The parties agree that this agreement may be electronically signed. The parties agree that the electronic signatures appearing on this agreement are the same as handwritten signatures for the purposes of validity, enforceability, and admissibility.

Preparer/Translator Signature

[Create Signature](#)

[SAVE](#) [CANCEL](#)

I-9 Review (4/14)

Employee Onboarding / I-9 Review (4/14)

1 2 3 4 5 6 7 8 9 10 11 12 13 14

1 of 3 Automatic Zoom

Employment Eligibility Verification
Department of Homeland Security
U.S. Citizenship and Immigration Services

USCIS
Form I-9
OMB No. 1615-0047
Expires 08/31/2019

▶ **START HERE:** Read instructions carefully before completing this form. The instructions must be available, either in paper or electronically, during completion of this form. Employers are liable for errors in the completion of this form.

ANTI-DISCRIMINATION NOTICE: It is illegal to discriminate against work-authorized individuals. Employers **CANNOT** specify which document(s) an employee may present to establish employment authorization and identity. The refusal to hire or continue to employ an individual because the documentation presented has a future expiration date may also constitute illegal discrimination.

Section 1. Employee Information and Attestation (Employees must complete and sign Section 1 of Form I-9 no later than the **first day of employment**, but not before accepting a job offer.)

| | | | | |
|---|--|----------------------------|--------------------------------|-------------------|
| Last Name (Family Name) Pike | First Name (Given Name) Roy N. | Middle Initial | Other Last Names Used (if any) | |
| Address (Street Number and Name) Turkey Pen Road | Apt. Number | City or Town Huntington | State NY | ZIP Code 11743 |
| Date of Birth (mm/dd/yyyy) 1/1/0001 | U.S. Social Security Number 0 3 9 6 2 4 2 9 9 | Employee's E-mail Address | Employee's Telephone Number | |

BACK NEXT CANCEL

This step generates Form I-9 as a PDF document. It is prefilled with data from earlier in this Onboarding process.

Some of the document will be filled in during the verification process as part of Onboarding - Phase 4.

Personal Information (5/14)

Employee Onboarding / Personal Information (5/14)

PERSONAL INFORMATION

| | | | |
|--------------------------------|----------------------|----------------------------------|------------|
| Social Security Number | ***.**-4299 Unmask | Date Of Birth | MM/DD/YYYY |
| Salutation | ▼ | Gender | ▼ |
| First Name | Roy | Citizenship | ▼ |
| Last Name | Pike | Driver's License Number | |
| Middle Name | | Driver's License Expiration Date | MM/DD/YYYY |
| Other Last Names User (If Any) | | Driver's License Class | |
| Nickname | | Driver's License State | ▼ |
| Suffix | | | |

BACK NEXT CANCEL

The fifth step requires basic personal information, including Name and Gender. Only boxes with a blue line at the beginning are mandatory. Information is prefilled from the 1-9 steps.

Contact Information (6/14)

Employee Onboarding / Contact Information (6/14)

1 2 3 4 5 6 7 8 9 10 11 12 13 14

RESIDENTIAL ADDRESS (PHYSICAL ADDRESS)

Address

Apt. Number

City Or Town

State

Zip Code

CONTACT INFORMATION

Personal Phone

Personal Cell Phone

Personal Email Address

Company Phone

Company Cell Phone

Company Email Address

ALTERNATE MAILING ADDRESS

Setup Alternate Address

EMERGENCY CONTACT

First Name

Last Name

Phone

Alternate Phone

Email Address

Relationship

Note

BACK **NEXT** CANCEL

Information is pre-filled from the Form I-9 steps.

The home address must be a physical address for tax calculations. If the address is not recognized by Symmetry Tax Engine, then it will need to be pinpointed on a map.


Residential Address

1 Entered Address is not valid for payroll. Please use the map below to specify the location that will be used for payroll.

Address Validation

Residential Address

Turkey Pen Gap Trailhead,
Turkey Pen Rd.,
Horse Shoe,
NC 28742,
USA
35.343° N, -82.6594° E



Skip Validation. I have examined and verified that my address is correct.

SAVE CANCEL

Type into the box to adjust the address.

It is possible to skip this address validation; however, it will need to be finalized during Onboarding - Phase 3.

Miscellaneous (7/14)

Employee Onboarding / Miscellaneous (7/14)

1 2 3 4 5 6 7 8 9 10 11 12 13 14

EDUCATION

[+ Add Education](#) | Search [Select Columns](#)

| Actions | School Name | Start Year | End Year | Field Of Study | Degree Earned | Note |
|---------|-------------|------------|----------|----------------|---------------|------|
| No data | | | | | | |

20 50 100 Page 1 of 1 (0 items) 1

SKILLS

[+ Add Skill](#) | Search [Select Columns](#)

| Actions | Name | Note | Level | Certified Date | Renewal Date |
|---------|------|------|-------|----------------|--------------|
| No data | | | | | |

20 50 100 Page 1 of 1 (0 items) 1

BACK **NEXT** CANCEL

New-hire employees can add miscellaneous information for Education and Skills.

Miscellaneous information is voluntary. The page can be skipped.

Click "Add Education" to provide educational information.

The screenshot shows a modal window titled "Add Education". On the left side, there are labels for "School Name", "Start Year", "End Year", "Field Of Study", "Highest Degree", and "Note". To the right of these labels are corresponding input fields. A red circle with a hand icon is positioned over the "School Name" input field. At the bottom right of the modal, there are two buttons: a blue "CREATE" button and a grey "CANCEL" button.

Click "Add Skills" to provide information about skills and certifications.

The screenshot shows a modal window titled "Add Skill". On the left side, there are labels for "Skill Name", "Skill Comment", "Competency Level", "Date Certified", and "Renewal Date". To the right of these labels are corresponding input fields. The "Date Certified" and "Renewal Date" fields include date pickers with the format "MM/DD/YYYY". A red circle with a hand icon is positioned over the "Skill Name" input field. At the bottom right of the modal, there are two buttons: a blue "CREATE" button and a grey "CANCEL" button.

EEO Identification (8/14)

Employee Onboarding / EEO Identification (8/14)

1 2 3 4 5 6 7 8 9 10 11 12 13 14

The following information is optional and is used only for Equal Employment Opportunity reporting purposes. We ask you to supply it so that we can generate government-mandated statistics. Thank you for your help!

VOLUNTARY SELF-IDENTIFICATION OF RACE/ETHNICITY

- White
Not Hispanic or Latino. A person having origins in any of the original peoples of Europe, the Middle East or North Africa.
- Black Or African American
Not Hispanic or Latino. A person having origins in any of the Black racial groups of Africa.
- Asian
Not Hispanic or Latino. A person having origins in any of the original peoples of Far East, Southeast Asia, or the Indian Subcontinent, including, for example Cambodia, China, India, Japan, Korea, Malaysia, Pakistan, the Philippine Islands, Thailand, and Vietnam.
- Native Hawaiian Or Other Pacific Islander
Not Hispanic or Latino. A person having origins in any of the original peoples of Hawaii, Guam, Samoa, or other Pacific Islands.
- American Indian Or Alaska Native
Not Hispanic or Latino. A person having origins in any of the original peoples of North and South America (including Central America) and who maintains tribal affiliation or community attachment.
- Hispanic Or Latino

BACK NEXT CANCEL

The Equal Employment Opportunity program is voluntary. This page can be skipped.

Tax Withholding (9/14)

The screenshot shows a web form titled "Employee Onboarding / Tax Withholding (9/14)". At the top, there is a progress bar with 14 numbered steps. Step 9 is highlighted in blue, indicating the current step. Below the progress bar, the text reads "Use the W-4 worksheet or the online IRS Calculator." The form is divided into two main sections: "FEDERAL TAX" and "STATE TAXES - FL (RESIDENTIAL LOCATION)". Under "FEDERAL TAX", there are three input fields: "Federal Filing Status" (a dropdown menu), "Federal Allowances" (a text input field), and "Federal Additional Withholding" (a text input field with a dollar sign icon). Under "STATE TAXES - FL (RESIDENTIAL LOCATION)", there is a checkbox labeled "Nonresident Certificate". At the bottom right of the form, there are three buttons: "BACK", "NEXT" (highlighted in blue), and "CANCEL".

The employee can set the basic levels for their taxation. These values can be adjusted later on the Employee Overview page.

Form W-4 (10/14)

Employee Onboarding / W-4 (10/14)

1 2 3 4 5 6 7 8 9 10 11 12 13 14

Please check and sign the document below

Form W-4 (2019)

Future developments. For the latest information about any future developments related to Form W-4, such as legislation enacted after it was published, go to www.irs.gov/FormW4.

Purpose. Complete Form W-4 so that your employer can withhold the correct federal income tax from your pay. Consider completing a new Form W-4 each year and when your personal or financial situation changes.

Exemption from withholding. You may claim exemption from withholding for 2019 if **both** of the following apply.

using this calculator if you have a more complicated tax situation, such as if you have a working spouse, more than one job, or a large amount of nonwage income not subject to withholding outside of your job. After your Form W-4 takes effect, you can also use this calculator to see how the amount of tax you're having withheld compares to your projected total tax for 2019. If you use the calculator, you don't need to complete any of the worksheets for Form W-4.

Note that if you have too much tax withheld, you will receive a refund when you file your tax return. If you have too little tax withheld, you will owe tax when you file your tax return, and you might owe a penalty.

Specific Instructions

Personal Allowances Worksheet

Complete this worksheet on page 3 first to determine the number of withholding allowances to claim.

Line C. Head of household please note: Generally, you may claim head of household filing status on your tax return only if you're unmarried and pay more than 50% of the costs of keeping up a home for yourself and a qualifying individual. See Pub. 501 for more information about filing status.

Line E. Child tax credit. When you file your tax return, you may be eligible to claim a child tax credit for each of your eligible children. To qualify, the child must be under

ACCEPT AND SIGN

I Declare
Under penalties 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. I confirm that I have read and agree to this document.

I Declare
The parties agree that this agreement may be electronically signed. The parties agree that the electronic signatures appearing on this agreement are the same as handwritten signatures for the purposes of validity, enforceability, and admissibility.

Your Name: _____
Signature: _____

Create Signature

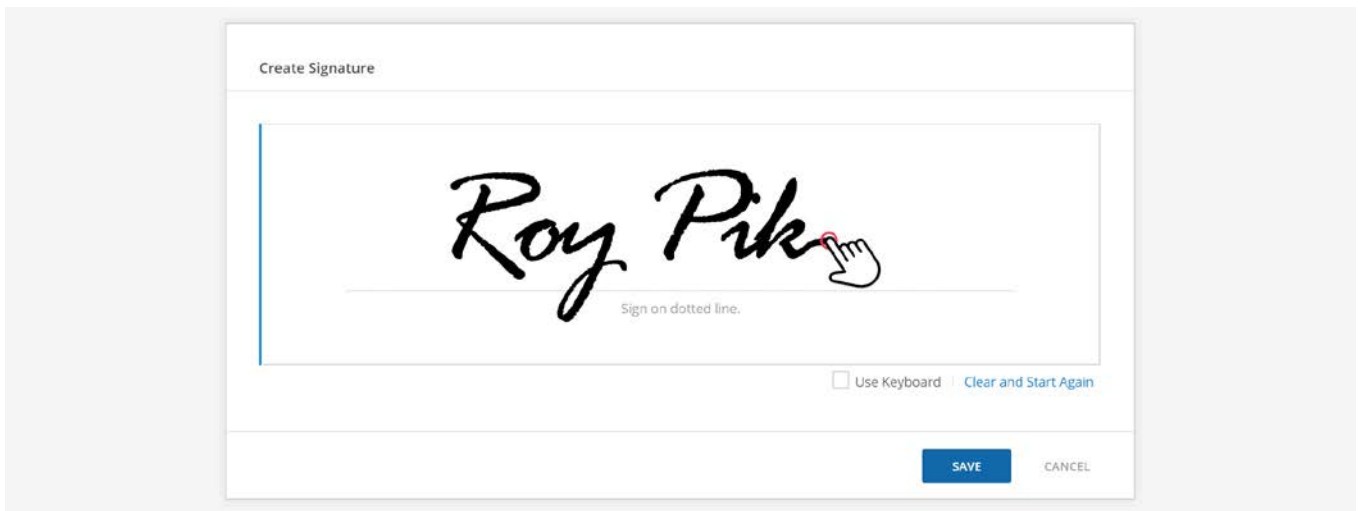
BACK NEXT CANCEL

Information that was provided earlier in the Onboarding wizard will automatically prefill the W-4 form.

The W-4 form must be signed.

If the employee would like to sign the form by hand, they should click **NEXT** to move forward in the Onboarding process. The signature will be added later.

If the employee would like to sign the form electronically, they must mark the "I Declare" checkbox to make the subsequent signature valid. Click "Create Signature". If a signature has already been made, it will be prefilled. Otherwise, the signature can be made with a mouse or the keyboard.



Click **SAVE**.

Net Pay Allocation (11/14)

Employee Onboarding / Net Pay Allocation (11/14)

1 2 3 4 5 6 7 8 9 10 11 12 13 14

Split Paychecks

Each paycheck can be split between multiple bank accounts. Add an account using "Add New Bank Account" link.

Order in the table below drives the priority of deductions from the net pay. You can change the order using the "Prioritize" link.

If the sum of all net pay allocations doesn't equal 100% of the net pay, the remainder will be issued as a live check.

[+ Add New Bank Account](#) | Search [Select Columns](#)

| Actions | Account Type | Account Number | Routing Number | Account Holder Name | Amount | Percent |
|---------|--------------|----------------|----------------|---------------------|--------|---------|
| No data | | | | | | |

20 50 100 Page 1 of 1 (0 items) 1

BACK **NEXT** CANCEL

Paychecks can be split between different accounts.

Click "Add Bank Account" to establish the connection for Direct Deposit.

Add Bank Account

ACCOUNT DETAILS

Account Type

Account Number

Routing Number

Account Holder Name

ALLOCATION DETAILS

Pay Into This Account

Amount \$

CREATE CANCEL

Document Acknowledgement (13/14)

Multiple documents can be signed at the same time. Each must first be reviewed. Click "Next" to check and acknowledge each of the documents.

The "I Declare" box should be checked to authenticate the validation of the documents.

Employee Onboarding / Documents Acknowledgment (13/14)

MSCC-Contract2019.docx 1 of 2 Previous Next

1 of 1 Automatic Zoom

Welcome to Englund Chiropractic Office, Inc.

This Contract is between Englund Chiropractic Office and Roy N. Pike. It is legal and binding. The terms of this Agreement shall begin on 4/1/2019

This Contract may not be modified in any manner, unless it is done in writing and signed by both Parties. This document and any attachments hereto constitute the entire agreement between the Parties. This Contract shall be binding upon the Parties, their successors, heirs and assigns, and shall be enforced under the laws of the United States of America.

Employer signature Employee signature

(Employer Signature) (Employee Signature)

(Employer Representative Name) (Employee Name)

Date: 4/1/2019

Accept and Sign

WARNING
You must review 1 remaining documents before you can accept and sign.

I Declare
Under penalties of perjury, I declare that I have examined this document and, to the best of my knowledge and belief, it is true, correct, and complete. I confirm that I have read and agree to these documents.

I Declare
The parties agree that this agreement may be electronically signed. The parties agree that the electronic signatures appearing on this agreement are the same as handwritten signatures for the purposes of validity, enforceability, and admissibility.

Your Name

Create Signature

BACK NEXT CANCEL

Signing Documents Summary (14/14)

There is confirmation for all of the documents that have been signed.

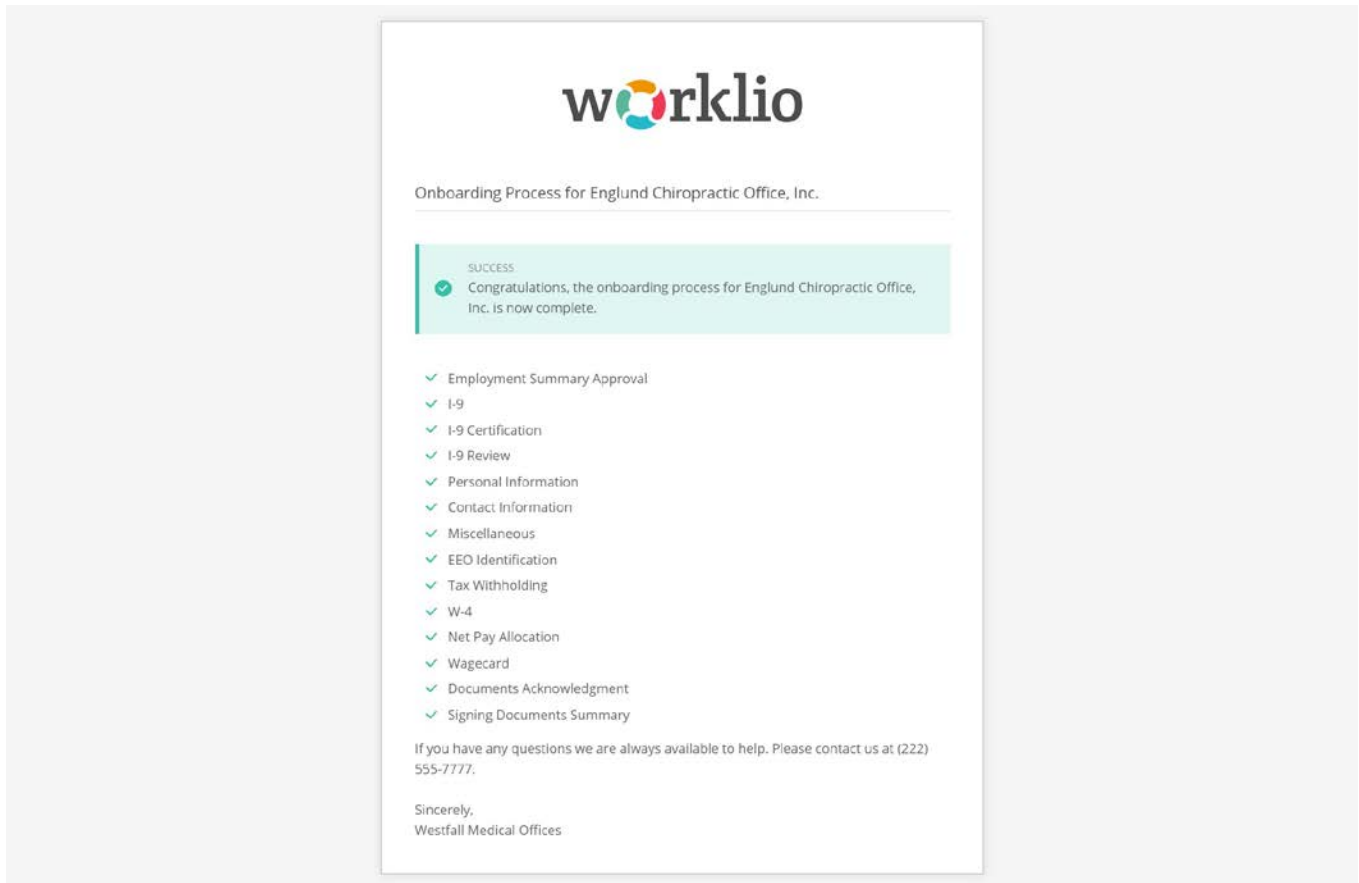
The screenshot shows a progress bar at the top with 14 steps, where step 14 is highlighted. Below the progress bar, there is a search bar with 'Download All' and a search icon. A table lists signed documents with 'Download' links. At the bottom right, there are 'BACK', 'FINISH', and 'CANCEL' buttons.

| Actions | Document Name |
|--------------------------|---------------|
| Download | I-9 Form |
| Download | W-4 Form |

Page 1 of 1 (2 items) 1

Click **FINISH** to end the Employee Onboarding wizard.

When the Employee Onboarding wizard is complete, the new-hire employee will see the Last Page



An automated email is sent to the Administrator or Client to announce that the new-hire employee has completed their part of the Onboarding process.

An automated email is also sent to the new-hire employee.

Onboarding - Phase 4 is where all of the new-hire employee's information and data must be verified.