



# On-boarding quick start guide

*a simpler way to add a new employee*

*for beta schools*

**[beta.edpay.nz](https://beta.edpay.nz)**

**EdPay**

# On-boarding a new employee

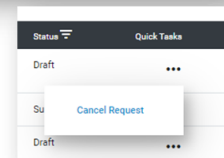
## STEP ONE

You will need your employee's MOE number and IRD number

Check this is the employee you want to hire, before clicking CONTINUE

The screenshot shows the 'Add New Employee' form with a progress bar at the top containing: CHECKLIST, PRELIMINARY QUESTIONS (highlighted in red), PERSONAL DETAILS, FINANCIAL DETAILS, CONTRACT DETAILS, and SUMMARY. Below the progress bar, the 'Previous Employment' section has two input fields: 'Please provide MOE number' with the value '1045183' and a green checkmark, and 'Please provide IRD number' with the value '000-000-000'. At the bottom are 'BACK' and 'NEXT' buttons. A callout box on the right contains the text: 'You are on-boarding Bailey, Jean MoE: 1045183' followed by a 'CONTINUE' button and a note: 'If this is not who you are wanting to on-board please check the MOE number and re-enter'.

If you click NEXT by mistake, you can restart by choosing 'Cancel Request' under 'Quick Tasks'. This is found in the activity history.



## STEP TWO

The screenshot shows the 'Add New Employee' form with the progress bar now highlighting 'CONTRACT DETAILS' in red. The 'PRELIMINARY QUESTIONS' and 'PERSONAL DETAILS' sections are now greyed out. Below the progress bar, the 'New Position' section is visible. A callout box on the right shows a preview of the employee's details: 'Bailey, Jean', 'MoE: 1045183', 'Date of Birth: 01/01/0001', 'IRD number: 000-000-000', 'Residential Address', and 'Mobile Phone'. Below this preview is a note: 'If this is not who you are wanting to on-board then cancel this request and start again'. Arrows point from the text instructions to the 'PERSONAL DETAILS' and 'CONTRACT DETAILS' sections of the progress bar.

Personal and financial details will automatically load. They can be accessed and edited once your transaction has been processed.

You'll go directly to the Contract Details page

Enter contract details, re-check this is the employee you want to hire, then click CONTINUE

### STEP THREE

Some on-boarding transactions will be processed immediately, saving time. As we develop Edpay, the proportion of immediate processing will increase.

Once you've added contract details and clicked CONTINUE, what you see will tell you whether your transaction will be immediately processed.

EITHER

You will go directly to the summary page. This means your transaction has been immediately processed.

Add New Employee

CHECKLIST

PRELIMINARY QUESTIONS

PERSONAL DETAIL

FINANCIAL DETAIL

CONTRACT DETAILS

SUMMARY

Print Page

Bailey, Jean

MoE number: 1045183

IRD number: 000000000

Contract Details

Employment Agreement

Support Staff for Schools CA

Start Date

16/07/2020

End Date

Grade

Position Title

Step

Payrate

OR

The add allowance field will appear, so you can add allowances, then CONTINUE to the summary page. This means your transaction needs to be processed by our school account team.

Allowances

Comments

Comments related to the new person and position

### STEP FOUR

After SUBMIT go to ACTIVITY HISTORY

Task Type

Status

Onboarding

Successful

Successful means....

Your transaction has been processed immediately. You can now view the employee in the My Employees dashboard and review/update personal and financial details, then add allowances.

Task Type

Status

Onboarding

Submitted

Submitted means.....

Your transaction has been sent to our school account team for processing. You will receive an email once processing is been completed. You will then be able to view the employee in the My Employees dashboard and review/update personal and financial details.

# Your proof of transaction

- Go to Activity History.
- Click on the transaction that you have completed.
- You will see the transaction summary page. Save this summary as a pdf, or print.

COMPLETED

Task

Onboarding

2949032

Employee

Bailey, Jean

1045183

Created

20 July 2020

Admin5, Demo

Last Modified

20 July 2020

Admin5, Demo

Add New Employee

PERSONAL DETAIL

PERSONAL DETAIL

PERSONAL DETAIL

PERSONAL DETAIL

PERSONAL DETAIL

SUMMARY

Print Page

Bailey, Jean

MoE number: 1045183

IPG number: 000000000

Activity History

Customer Action Required: 0

Submitted: 1

In Progress: 0

Find an employee...

Date Created ↑	Employee Name ↓	MoE#	Job#	Created By ↓	Task Reference ↓	Task Type ↓	Status	Quick Tasks
20/07/2020	Bailey, Jean	1045183		Admin5, Demo	2949032	Onboarding	Submitted	

612

Permanent

Total hours for class

FTS Percentage

25.00

Host School Name and Number

Funding Source

Funding Department

Funding Percentage

11111

11111 -

100