



On-boarding quick start guide

a simpler way to add a new employee

www.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

Add New Employee

CHECKLIST	PRELIMINARY QUESTIONS	PERSONAL DETAILS	FINANCIAL DETAILS	CONTRACT DETAILS	SUMMARY
Previous Employment					
Please provide MOE number ?		Please provide IRD number			
<input type="text" value="1045183"/>		<input type="text" value="000-000-000"/>			
You are on-boarding					
Tang, Jenny					
MoE: 1045183					
<input type="button" value="CONTINUE"/>					
If this is not who you are wanting to on-board please check the MOE number and re-enter					

STEP TWO

Add New Employee

CHECKLIST	PRELIMINARY QUESTIONS	PERSONAL DETAILS	FINANCIAL DETAILS	CONTRACT DETAILS	SUMMARY
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New Position

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

Bailey, Jean	
MoE: 1045183	
Date of Birth	<input type="text" value="01/01/0001"/>
IRD number	<input type="text" value="000-000-000"/>
Residential Address	<input type="text"/>
Mobile Phone	<input type="text"/>
If this is not who you are wanting to on-board then cancel this request and start again	

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 that once you submit, your transaction will be immediately processed. You can then view the employee in the My Employees dashboard and review/update personal and financial details, then add allowances.

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 being 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.

The image shows two overlapping screenshots of a web application. The background screenshot is the 'Add New Employee' page, which has a top navigation bar with 'COMPLETED' and a header area with four tabs: 'Task', 'Employee', 'Created', and 'Last Modified'. Below the header is a tabbed interface with 'PERSONALITY DETAILS', 'PERSONAL DETAILS', 'PERSONAL DETAILS', 'PERSONAL DETAILS', and 'SUMMARY'. The 'SUMMARY' tab is active, showing details for 'Bailey, Jean' with MoE number 1045183 and IPG number 000000000. A 'Print Page' button is visible. The foreground screenshot is the 'Activity History' page, which has a search bar with the text 'Find an employee...'. Below the search bar, it shows 'Customer Action Required: 0', 'Submitted: 1', and 'In Progress: 0'. A table lists activity history with columns: 'Date Created', 'Employee Name', 'MoE#', 'Job#', 'Created By', 'Task Reference', 'Task Type', 'Status', and 'Quick Tasks'. The table contains one row: '20/07/2020', 'Bailey, Jean', '1045183', 'Admin5, Demo', 'Admin5, Demo', '2949032', 'Onboarding', 'Submitted'. Below the table, there is a form with fields for 'Total Hours For Week', 'FTE Percentage', 'Hear School Name and Number', 'Funding Source', 'Funding Department', and 'Funding Percentage'.

COMPLETED

Task: Onboarding 2949032 Employee: Bailey, Jean 1045183 Created: 20 July 2020 Admin5, Demo Last Modified: 20 July 2020 Admin5, Demo

Add New Employee

PERSONALITY DETAILS PERSONAL DETAILS PERSONAL DETAILS PERSONAL DETAILS SUMMARY

Print Page

Bailey, Jean
MoE number: 1045183
IPG number: 000000000

Activity History

Find an employee...

Customer Action Required: 0
Submitted: 1
In Progress: 0

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	

112 Permanent

Total Hours For Week: 25.00 FTE Percentage: 100%

Hear School Name and Number: 11111

Funding Source: 11111 Funding Department: 11111 Funding Percentage: 100