

YMCA Self-Onboarding – Employee information collection sheet

Legal Name: _____ ***if no middle name, Check here:** _____

Work Location (check below):

_____ **Athens YMCA**

_____ **YMCA Camps**

Position Title: _____

Supervisor: _____

Personal Email: _____

Work Email (if applicable): _____

Primary Phone: _____

Pay Rate (Hourly or Salary): _____

Primary Address (include Apt if needed): _____

Note 1: Employee will enter in their own address – it is suggested to have it available for Admin at collection time.

Note: Admin team will then submit this information – and send invite to the Employee to begin filling out their information:

The screenshot shows a web application interface for creating a new hire. At the top, there is a breadcrumb trail: Home / ... / Create New Hire. Below this is a section titled 'Create New Hire' with a red asterisk indicating required fields. The form includes several fields and options: 'New Hire Template' (dropdown menu set to 'Self-Onboarding'), 'Employee Type' (radio buttons for 'W2' and '1099', with 'W2' selected), 'Payroll Profile' (dropdown menu with 'Search or Make Selection'), 'Legal Name' (fields for 'First Name', 'Middle Name', 'Last Name', and 'Suffix', with a checkbox for 'Individual does not have a middle name'), 'Position Seat' (button labeled 'Assign'), 'Use Employee Address for Taxes' (radio buttons for 'Yes' and 'No', with 'No' selected), and 'Work Location' (dropdown menu with 'Search or Make Selection'). Below these fields is a section titled 'Self-Onboarding Invitation Details' which includes 'Personal Email' (text input) and 'Primary Phone' (text input with a country code dropdown set to '+1' and a placeholder '(xxx) xxx-xxxx'). At the bottom right of the form are two buttons: 'Cancel' and 'Create and Send Invitation' (with a dropdown arrow).

What the employee will fill out:

- **Social Security Number**
- **Birth Date**
- **Street Address/City/State/Zip**
- **Gender/Marital Status**
- **Personal Email (they can update what is imputed)**
- **Payroll info:**
- **Direct Deposit Information**
- **Tax Set up**
- **Custom Fields: Tshirt Size, Dr's License #, Dr. License State, Dr. License exp. Date, Highest Education, Degree Attained.**
- **Employee Photo**

What Admin will fill out

- **Assign a position seat/supervisor**
- **Work Email**
- **Labor Allocation Profile**
- **Labor Allocation Filter (most EEs will be no access)**
- **EEO-1 Category (not required)**
- **Pay Type (Hourly or Salary)**
- **Pay Rate**
- **Pay Basis Check display**
- **Employment Verification I-9 Employer side (it will be assigned as a checklist after Hire)**
- **Processing Schedule**
- **Exempt Status**
- **Scheduled Pay Period Hours (not mandatory, will default to 40)**
- **Auto Reduce Check (standard – auto assigned to avoid any negative checks)**
- **Pay Class (for Time and Attendance)**
- **Employee Self service- Active profile**
- **Check off – “Send ESS login via email”**
- **“Checklist” – to assign – new hire checklist**

-
- **Workers comp code (NOT SET UP YET) – so this will be optional**