# My Benefits Channel
# Process Employee Onboarding

The Process Employee Onboarding option is only available if the organization uses the School Accounting System-Online version, the organization has licensed the My Benefits Channel software, and the activation for the API connection between the School Accounting System and My Benefits Channel has been completed by Software Unlimited, Inc.  If applicable, the Process Employee Onboarding option is accessed from within the Employee File in Payroll and Human Resources (if applicable).  With the Process Employee Onboarding option, the information for new employees who have completed the onboarding process within the My Benefits Channel software can be viewed and brought into the School Accounting System in order to add the new hires to the Employee File (or ignored if an employee was already entered manually).  The information from My Benefits Channel that is brought into the Employee File with the Process Employee Onboarding option includes:  first name, middle name, last name, suffix (if applicable), address, city, state, zip code, phone number, work email address, birth date, social security number (federal ID), and gender.  The Process Employee Onboarding option also tracks the history of the employees who have been previously processed (or ignored).

*Tip:*  Generate the Benefit Management Export - Census Information report in Payroll and export it to a file in order to initially provide My Benefits Channel with a file of your current employees.  The Benefit Management Export - Census Information report is accessed under the Reports menu in Payroll and the Employee Reports (PR) grouping.  When generating the report, complete the report parameters as desired, unselect the Mask Federal ID field (located in the Miscellaneous Options section on the Report Printing Options screen), and then click the **Export** button.  At the Export Options screen, enter the correct path and name for which to export the report in the File Name field, and select the type of file for which to export the report, such as **Excel Spreadsheet**, in the File Type field; then click the **Execute** button.

<u>Processing Employee Onboarding</u>:
1.  From the Payroll or Human Resources screen, select the **Maintenance** menu, and then **Employees**.
2.  Select the **Options** menu and then **Process Employee Onboarding**.

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    *Tip:*  An alert will appear on the Payroll or Human Resources screen under the Alerts section for users with Full Access rights to the Employee File if there are newly onboarded employees that are waiting to be processed (see **Diagram A**); if applicable, click the alert to access the Process Employee Onboarding option and then continue with the steps below.

3.  The Process Employee Onboarding screen will appear listing the new employees who have completed the onboarding process within the My Benefits Channel software and are waiting to be added to the Employee File (newly onboarded
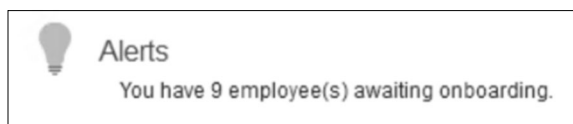


Diagram A

    employees show in the School Accounting System within a few seconds after an employee's onboarding record has been created within My Benefits Channel).  See **Diagram B**. The information that will be brought into the Employee File for each employee also displays.

    <u>Note:</u>  To view employees who have been previously processed (or ignored), change the filter for the Completed field (column) to **(All)** to display all the employees including those who are pending and those who have already been processed, or **True** to displays only the employees who have already been processed.  The employees that are pending are listed with the **Process** button and **Ignore** button enabled, while employees that have already been processed show with a checkmark in the Completed column and a disabled **Completed** button or **Ignored** button to indicate whether the employee was previously processed (added) or ignored.  If an employee is currently being

| Process Employee | Ignore (Remove from Processing) | First Name | Middle Name | Last Name | Suffix | Address 1 | Address 2 | City | State | Zip Code | Phone Number | Email Address | Birth Date |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Process | Ignore | Henry | | Jones | III | 234 Crown Street | | Someplace | IA | 57490 | 9440018 | henry.jones@school.k12.ia.us | 05/27/1966 |
| Process | Ignore | Jaqi | | Garcia | | 1234 Huckfinn Street | | Someplace | IA | 57490 | 9444411 | jaqi.garcia@school.k12.ia.us | 04/12/1988 |
| Process | Ignore | Kelly | | Davis | | 9000 Oscar Court | | Someplace | IA | 57490 | 9441200 | kelly.davis@school.k12.ia.us | 08/12/1981 |
| Process | Ignore | Kevin | | Martin | | PO Box 1212 | | Someplace | IA | 57490 | 9448787 | kevin.martin@school.k12.ia.us | 05/31/1999 |
| Process | Ignore | Christopher | | Lee | Sr. | 814 W 9th Street | Apt. 301 | Someplace | SD | 57490 | 9550994 | christopher.lee@school.k12.ia.us | 03/24/1990 |
| Process | Ignore | Anthony | | Taylor | III | 8574 Jackson Blvd | | Someplace | SD | 57490 | 9443780 | anthony.taylor@school.k12.sd.us | 01/12/1979 |
| Process | Ignore | Kimberly | Ann | Rodriguez | | 1090 N Main St | | Someplace | SD | 57490 | 9559761 | kimberly.rodriguez@school.k12.sd.us | 10/01/1985 |
| Process | Ignore | Debbie | | Moore | | 622 E 37th Street | | Someplace | SD | 57490 | 9554883 | debbie.moore@school.k12.sd.us | 06/11/1989 |
| Process | Ignore | Jas... | | ... | | | | Someplace | SD | 57490 | 9443500 | jason.walker@school.k12.sd.us | 07/31/1991 |

All the new employees who have completed the onboarding process within My Benefits Channel and are waiting to be added to the Employee File appear here.

To add a newly onboarded employee to the Employee File, click the **Process** button.

**Diagram B**

processed, the **Processing** button or **Ignoring** button will appear instead until the applicable process is completed.

4. Complete the process for a newly onboarded employee as desired.

    a. To add a newly onboarded employee to the Employee File, click the **Process** button and the information brought in from My Benefits Channel for the employee will display in the appropriate fields. If needed, make changes and then complete the remaining fields for adding the employee; and click the **Save** button. (**Note:** If the social security number (federal ID) for the newly onboarded employee matches the social security number entered for another employee already set up in the Employee File, a prompt will appear; click **OK** and the existing employee record will display with the new data from My Benefits Channel being populated in the applicable fields.)

    *Tip:* Required fields (those that must be completed) will display with an error icon to the right of the field; all required fields must be completed (errors resolved) before the data on the selected screen (tab) of the Employee File can be saved. After saving an employee's information on the Name & Address screen (tab), the other screens (tabs) with required fields that need to be completed for the employee appear with the error icon to the left of the tab name; click the appropriate tabs and complete the remaining fields for adding the employee.

    **Note:** The address for the newly onboarded employee (as entered in My Benefits Channel) will appear in the Address 1 and Address 2 (if applicable) fields in the Employee File, the phone number will appear in the Primary Phone Number field, and the work email address will appear in the Business Email Address field.

    b. To ignore (not add) the employee, click the **Ignore** button, and then click **Yes** when prompted.

5. If there are additional pending employees to process, go back to the Process Employee Onboarding screen and repeat Steps 4-5 as many times as needed.

6. When finished, click the **X** in the upper right-hand corner to close the Process Employee Onboarding screen.