



## **NASDA's New Hire Onboarding Wizard**

**(Employee Instructions)**



## Welcome to NASDA!

Congratulations! You are well on your way to becoming a NASDA employee. The next step is to complete the ***New Hire Onboarding Wizard***. The following instructions will help guide you through the process to complete the NASDA onboarding forms. Should you have any issues please contact your NASDA Supervisor.

A video tutorial is also available to walk you through each form step-by-step. Please click or type the link below into your web browser to view the video. Another option is to copy and paste the link into your web browser.

<http://youtu.be/UzAUG5cBfEg?hd=1>

# New Hire Welcome Email

## STEP 1:

- An email has been sent to your email account with a link to fill out NASDA onboarding information. A sample of the email has been provided below.
- If you need to finish the process later, you can return to the onboarding process anytime by entering your username and password that you created when you first clicked on the New Hire link. Instructions to return to the onboarding forms are at the bottom of the original email .

iSolved Onboarding Initiated □ Inbox x 🖨 📧



payrollnetwork@myisolved.com

🔒 to me ▾

12:57 PM (1 minute ago) ☆



Hello Penny,

We'd like to welcome you to **National Association of State Departments of Agriculture** and congratulate you on your new position. The next step will be to complete our New Hire Onboarding Process.

### What can I expect to answer in the Onboarding Process?

You will proceed through a set of screens where you will be able to enter various personal, tax and other relevant employment information.

### How long does it take?

The average time ranges between 10-20 minutes. Note that your sessions will expire after 20 minutes of inactivity. If you need to return to the Onboarding Wizard, follow the steps at the bottom of this email.

**When you're ready, click the link below to authenticate your credentials and begin the Onboarding Process.**

<https://payrollnetwork.myisolved.com//AuthenticateUser.aspx?ticket=fbc48f6d-fef5-4fb3-9fc5-a864d88106dc&eid=0&peid=2921&>

**To return to the Onboarding Wizard after authenticating your user credentials, follow these steps:**

1. Go to <https://payrollnetwork.myisolved.com/>
2. Enter your username (your email address) and the password you created during authentication. If you forgot your password, click the forgot password link.
3. Click **Login**

# New User Account Setup

## New User Account Setup

To activate your new account please enter the following information into the fields below and click the Continue button.

### Account Information

User Name:	<input type="text" value="lizzybizzy7@gmail.com"/>
Client Code:	<input type="text" value="1500"/>
Company Name:	<input type="text" value="National Association of State Departn"/>
Employee Name:	<input type="text" value="Penny Lookout"/>

### Setup Account Password

* New Password:	<input type="password" value="••••••••"/>
	<div style="border: 2px solid red; padding: 5px;">Choose a password for your new account. Please ensure that passwords are a minimum of 8 alphanumeric (at least one each of alpha [a-z] and numeric [0-9]) characters in length and contain at least 1 special characters [!@#\$\$%^&amp;*()].</div>
* Confirm New Password:	<input type="password" value="••••••••"/>
	<input type="text" value="Re-enter your password to ensure it is correct."/>
* Challenge Question:	<input type="text" value="What was the name of your first pe"/> <input type="button" value="v"/>
	<input type="text" value="Choose a question only you would know the answer to. You will be prompted to answer this question if you need to reset your password."/>
* Challenge Answer:	<input type="text" value="Petunia"/>
	<input type="text" value="Specify the answer to the challenge question you created above."/>

## STEP 2:

- After clicking the New Hire link, a page to setup your account to access your onboarding documents will appear.
- Make sure to follow the password guidelines located under **New Password** to meet the password criteria.
- Once you have entered a password, challenge question and a mobile number, click **CONTINUE**.

# New Hire Onboarding Dashboard

## STEP 3:

- Review NASDA policies and forms on the right hand side of the dashboard

The screenshot displays the 'Onboarding Wizard' interface. At the top, it shows the user's email 'ead.rowland@gmail.com' and the NASDA logo. The main content area is divided into three columns: 'Congratulations', 'Your important info', and 'Your documents to review'. The 'Congratulations' section includes a message and the start date '4/27/2017'. The 'Your important info' section shows the email 'ead.rowland@gmail.com'. The 'Your documents to review' section lists three PDF documents, each with a 'View here' link and a confirmation that the user has acknowledged reading the document. A blue arrow points to the 'Your documents to review' section.

Onboarding Wizard

Welcome

Welcome, Petunia M Sassy

Welcome to NASDA! We are pleased to have you join our team. Thank you for initiating the New Hire Onboarding process. Please click on the links at the left to enter all required information and complete your profile in our Employee Portal: iSolved. Please note that fields marked with a \* are required.

**Congratulations**

Congratulations on your new position.

Your Start Date  
4/27/2017

**Your important info**

Email  
ead.rowland@gmail.com

**Your documents to review**

NAS-004 Certification of Confidentiality and Motor Vehicle Insurance.pdf (PDF)  
View here [🔗](#)  
 You have acknowledged reading this document!

NASDA Cell Phone Policy (PDF)  
View here [🔗](#)  
 You have acknowledged reading this document!

NASDA Enumerator Handbook (PDF)  
View here [🔗](#)  
 You have acknowledged reading this document!

Your Onboarding Progress: Incomplete

# Review and Acknowledge Documents



## Your documents to review

NASDA Enumerator Handbook (PDF)

View here 

I acknowledge that I have read and understood this document.

 Sign Acknowledgement

### STEP 3a:

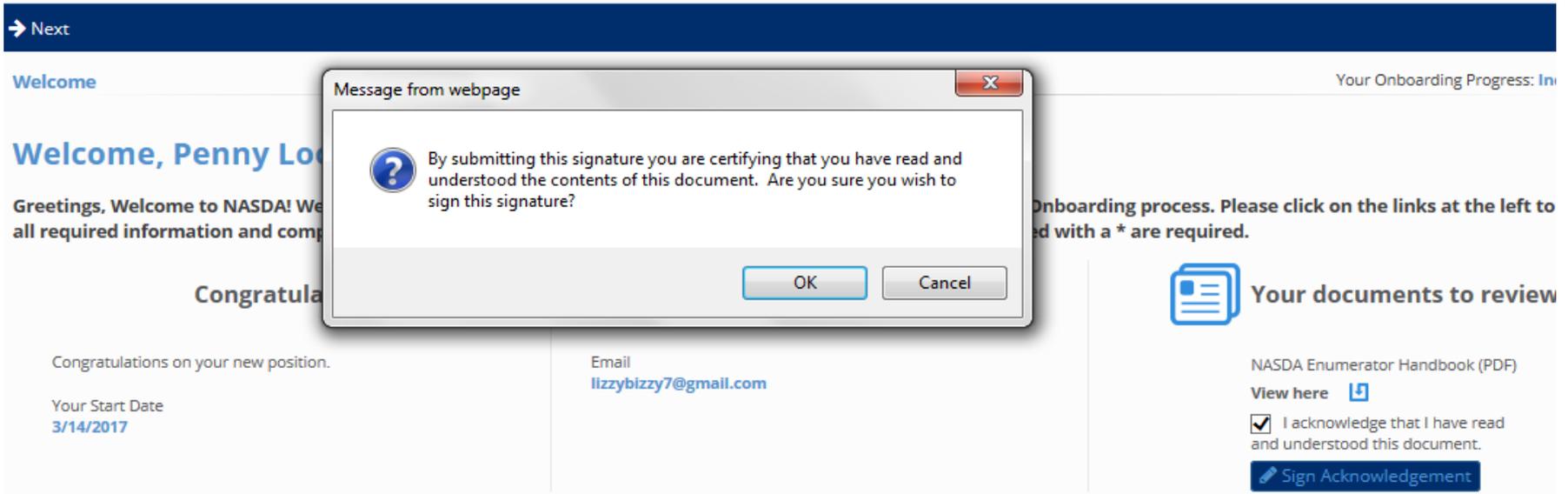
- Click the blue arrow icon  to view each policy. After the document has been reviewed, click the “I acknowledge that I have read and understood this document” box. A check mark will appear in the box.

### STEP 3b:

- Once the box has been checked you will click **Sign Acknowledgement**.

### STEP 3c:

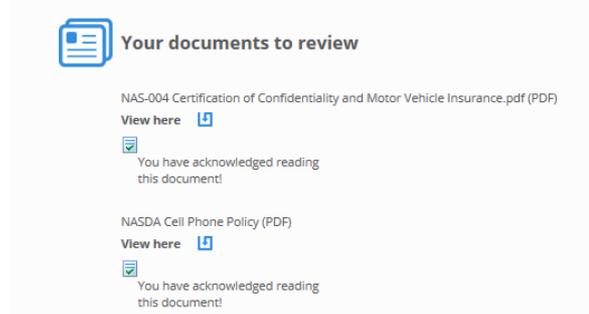
- Once the **Sign Acknowledgement** button has been clicked a message will pop up asking you to verify again that you wish to sign this signature. Click “OK” to sign and acknowledge. This message will appear twice. Please click “OK” each time it asks you.



The screenshot shows a web interface for NASDA onboarding. At the top left, there is a blue bar with a white arrow and the text "Next". Below this, the page has a "Welcome" header. The main content area is titled "Welcome, Penny Lopez" and includes a greeting: "Greetings, Welcome to NASDA! We have received all required information and completed your onboarding process." Below this, there are sections for "Congratulations on your new position.", "Your Start Date 3/14/2017", and "Email lizzybizzy7@gmail.com". On the right side, there is a section titled "Your documents to review" with a list of documents: "NASDA Enumerator Handbook (PDF)" and "NASDA Cell Phone Policy (PDF)". A "Sign Acknowledgement" button is visible at the bottom right. A modal dialog box titled "Message from webpage" is overlaid in the center, containing a question mark icon and the text: "By submitting this signature you are certifying that you have read and understood the contents of this document. Are you sure you wish to sign this signature?". The dialog has "OK" and "Cancel" buttons.

### STEP 4:

- After clicking **OK**, a green check mark will appear with a message below indicating you have successfully acknowledged and reviewed the NASDA Policy. Repeat **STEP 3** to acknowledge all NASDA Policy forms.



The screenshot shows the "Your documents to review" section. It lists two documents: "NAS-004 Certification of Confidentiality and Motor Vehicle Insurance.pdf (PDF)" and "NASDA Cell Phone Policy (PDF)". Each document has a "View here" link and a green checkmark icon. Below each checkmark, there is a message: "You have acknowledged reading this document!".

# Starting the New Hire Onboarding Wizard

## STEP 5:

- After you have read and acknowledged NASDA policy documents, click **NEXT** to begin the New Hire Onboarding Wizard



Onboarding Wizard

→ Next

Welcome

Your Onboarding Progress: Incomplete

Welcome, Petunia M Sassy

Welcome to NASDA! We are pleased to have you join our team. Thank you for initiating the New Hire Onboarding process. Please click on the links at the left to enter all required information and complete your profile in our Employee Portal: iSolved. Please note that fields marked with a \* are required.

**Congratulations**

Congratulations on your new position.

Your Start Date  
4/27/2017

**Your important info**

Email  
ead.rowland@gmail.com

**Your documents to review**

NAS-004 Certification of Confidentiality and Motor Vehicle Insurance.pdf (PDF)  
View here [↗](#)  
 You have acknowledged reading this document!

NASDA Cell Phone Policy (PDF)  
View here [↗](#)  
 You have acknowledged reading this document!

NASDA Enumerator Handbook (PDF)  
View here [↗](#)  
 You have acknowledged reading this document!

Onboarding Wizard

- Welcome
- Employee Data
- Other Employee Data
- EEO & Veteran Details
- I-9 Information
- Tax Information
- Employee Contacts
- Prior Employment
- Certifications
- Education
- Direct Deposit
- Confirmation Statement

# Employee Data

## STEP 6:

- Enter the required information for each line of the forms.
- Anything with an\* indicates a required field that must be filled in.
- Anytime during the process, you can click the **Previous** button to go back to a previous screen.

## STEP: 7

- Once all the requested lines of information have been entered, click **NEXT** to move to the next form.

## Onboarding Wizard

The screenshot shows the 'Onboarding Wizard' interface. On the left is a sidebar menu with the following items: 'Welcome' (with a green checkmark), 'Employee Data' (highlighted in orange with a red exclamation mark icon), 'Other Employee Data', 'EEO & Veteran Details', 'I-9 Information', 'Tax Information', 'Employee Contacts', 'Prior Employment', 'Education', and 'Confirmation Statement'. The main content area is titled 'Employee Data' and contains two sections: 'Employee Name' and 'Employee Address'. The 'Employee Name' section has four required fields: '\* First Name:' (containing 'Penny'), '\* Middle Name:', '\* Last Name:' (containing 'Lookout'), 'Prefix:', and 'Suffix:'. The 'Employee Address' section has three required fields: '\* Address:', '\* Zip Code:', '\* City:', and '\* State:'. Below the zip code field is a note: 'Hit Enter Key in zip code field to retrieve city list.' At the top of the main content area, there are two navigation buttons: '← Previous' and '→ Next'. The 'Next' button is highlighted with a red rectangular box.

# EEO & Veteran

## STEP 8:

- Use the drop down menus and check boxes to fill out any EEO & Veteran information that may apply to you.

## STEP 9:

- Click **NEXT** to move to the next form.

← Previous → Next

### EEO & Veteran Details

<b>EEO Information</b>	<b>Veteran Information</b>
Ethnic Origin: <input type="text"/>	Military Status: <input type="text"/>
Gender: <input type="text"/>	<input type="checkbox"/> Recently Separated Veteran
<b>Disability Information</b>	Active Duty Separation Date: <input type="text"/>
Disability: <input type="text"/>	<small>This date is an optional field and is not used for purposes of DOL Veteran reporting.</small>
	<input type="checkbox"/> Armed Forces Service Medal Veteran
	<input type="checkbox"/> Other Protected Veteran
	<small>Veterans who served on active duty in the U.S. military during a war or in a campaign or expedition for which a campaign badge is awarded.</small>
	<input type="checkbox"/> Disabled Veteran
	<input type="checkbox"/> Chose Not To Answer

# I-9 Information

## STEP 10:

- Use the drop down menu next to ***I attest under penalty or perjury, that I am....*** to select your citizenship status.

## STEP 11:

- Sign the I-9, by typing your First, Middle Initial, and Last Name. Once you have typed your name correctly, enter the date next to your typed name.

## STEP 12:

- Click **NEXT** to continue to the next form.

← Previous → Next

Read Instructions carefully before completing this form. [Click here for Instructions for Employment Eligibility Verification.](#)

* Last Name (Family Name)	Lookout	* Date of Birth (mm/dd/yyyy)	1/1/1999
* First Name (Given Name)	Penny	* U.S. Social Security Number	222-22-2222
Middle Initial	Z	Employee's E-mail Address	lizzybizzy7@gr
Other Last Names Used (if any)		Employee's Telephone Number	111-111-1111

* Address (Street Number and Name)	4350 N. Fairfax Dr. STE 910
Apt. Number	
* City or Town	ARLINGTON
* State	VA
* ZIP Code	22203

I am aware that federal law provides for imprisonment and/or fines for false statements or use of false documents in connection with the cor

\* I attest under penalty of perjury, that I am (check one of the following): 1. A citizen of the United States

* Signature of Employee	Penny Lookout	* Date of Signature (mm/dd/yyyy)	3/14/2017
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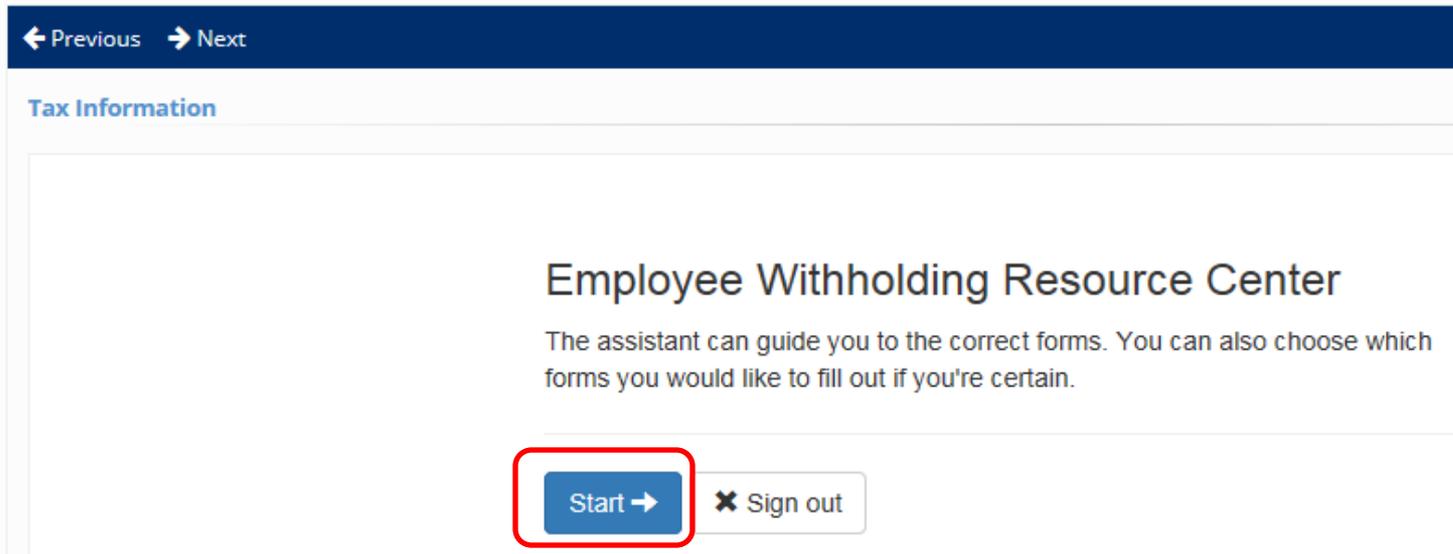
 Signature must be full name (First, Middle Initial, Last)

# Tax Information

Your work location determines the state and local tax forms that need to be completed.

## STEP 13:

- Click **START** to begin filling out Federal and State tax forms. Follow the prompts for calculation worksheets and other resources for help.



## STEP 14:

- Once the W4 and state tax forms have been completed click **NEXT** to continue to the next section

# Employee Contacts

## STEP 15:

- To add an Employee Contact click **Add New**.
- Enter the requested information and use the drop down menus to make required selections.
- Click **Save**
- To add another Employee Contact, repeat the process.
- Contacts can be edited by selecting the contact below Employee Contacts and clicking the **Edit** button
- Contacts can be deleted by selecting the contact below Employee Contacts and clicking the **Delete** button

## STEP 16:

- Click **Next** to move to the next form.

The screenshot shows a web interface for adding an employee contact. At the top, there is a dark blue navigation bar with '← Previous' and '→ Next' buttons. Below this is a header section with 'Employee Contacts' on the left and 'Your Onboarding Progress: In' on the right. A table with three columns: 'Contact Person', 'Relationship Code', and 'Call Order' is present but empty. Below the table is a dark blue action bar with icons for '+ Add New', 'Edit', 'Delete', 'Refresh', 'Save', and 'Cancel'. The main form area is divided into several sections: 'Contact Name' with fields for '\* First Name:' and '\* Last Name:'. 'Contact Info' with fields for '\* Relationship:' (a dropdown menu) and '\* Call Order:' (a dropdown menu), and a checkbox for 'Emergency Contact'. 'Phone Numbers and Email Address' with fields for 'Home:', 'Mobile:', and 'Office:'. 'Personal Information' with a 'Benefit Data' section containing checkboxes for 'Full-time Student' and 'Disabled'. 'Address' is also indicated as a section.

# Prior Employment

## STEP 17:

- Click **Add New** to add Prior Employment
- Fill in the requested information
- Click **Save** once the information has been completed.
- To add another prior employment record click **Add New**.
- When all information has been entered, click **NEXT**.

← Previous → Next

### Prior Employment

Employer	Job Title	Start Date	End Date

+ Add New Edit Delete Refresh Save Cancel

#### Job Info

\* Employer:

Job Title:

\* Start Date:    
MM/DD/YYYY

End Date:    
MM/DD/YYYY

#### Additional Info

Change Reason:

Manager/Reference:

#### Comments

# Certifications

## STEP 18:

- Click **Add New** to add a Certification. **NASDA Field Enumerators should enter driver's license information here.** Office Enumerators may go to STEP 19.
  - Use the drop down menu next to Certification to select **Driver's License #.**
  - Enter the state that issued your driver's license as the **Authority.**
  - Enter the date the license was issued as the **Effective Date.**
  - Enter your driver's license # as the **ID Number.**
  - Enter the **Expiration Date** of your license.
  - Click **SAVE** when you have filled in the Certification, Authority, Effective Date, ID Number, and Expiration Date. You can ignore the EE Reimbursement Info portion of the screen.
  - Click **NEXT** to move to the next form.

The screenshot displays a web application interface for managing certifications. At the top, there is a dark blue navigation bar with '← Previous' and '→ Next' buttons. Below this is a section titled 'Certifications' containing a table with two columns: 'Certification' and 'Effective Date'. The table is currently empty. A second dark blue navigation bar contains icons for '+ Add New', 'Edit', 'Delete', 'Refresh', 'Save', and 'Cancel'. Below the navigation bars, the form is divided into two sections: 'Certification Info' and 'EE Reimbursement Info'. The 'Certification Info' section includes fields for: '\* Certification:' (a dropdown menu), '\* Authority:' (a text input), 'Effective Date:' (a date picker with 'MM/DD/YYYY' format), '\* ID Number:' (a text input), 'Total Cost:' (a text input), and '\* Expiration Date:' (a date picker with 'MM/DD/YYYY' format). The 'EE Reimbursement Info' section includes fields for: 'Amount:' (a text input), 'Approval Date:' (a date picker with 'MM/DD/YYYY' format), and 'Reimbursement Date:' (a date picker with 'MM/DD/YYYY' format).

# Education

## STEP 19:

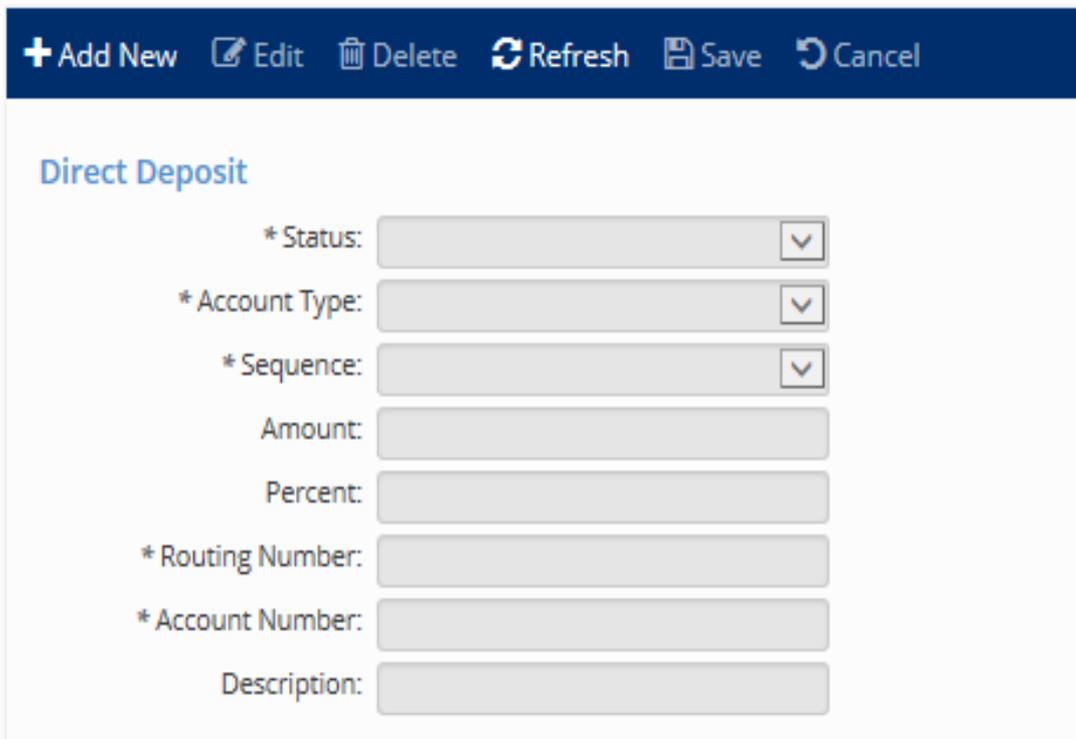
- Click **Add New** to add Education information.
- Fill in the requested information
- Click **Save** once the information has been filled out.
- To add another education record click **Add New**.
- Click **Next** when all Education information has been entered.

The screenshot displays a web interface for adding education records. At the top, a dark blue navigation bar contains a left arrow and the text 'Previous' and a right arrow and the text 'Next'. Below this is a section titled 'Education' with a table. The table has five columns: 'Education', 'School', 'Degree', 'Major', and 'Graduated', each with a small double-headed arrow icon. The table is currently empty. Below the table is another dark blue bar with action buttons: '+ Add New', 'Edit' (with a pencil icon), 'Delete' (with a trash icon), 'Refresh' (with a circular arrow icon), 'Save' (with a floppy disk icon), and 'Cancel' (with a circular arrow icon). The main form area is divided into two sections: 'Education' and 'Comments'. The 'Education' section contains three input fields: '\* Education:' (a dropdown menu), 'School:' (a text box), and 'Degree:' (a text box). The 'Comments' section is a large, empty text area. At the bottom left of the form area, the word 'Record' is visible.

# Direct Deposit

## STEP 20:

- NASDA strongly recommends that all employees enroll in direct deposit. To add your direct deposit account(s), click **+ Add New**. You will have the option to add multiple direct deposit accounts.



The screenshot shows a web interface for adding a direct deposit account. At the top, there is a dark blue navigation bar with the following icons and labels: '+ Add New', 'Edit', 'Delete', 'Refresh', 'Save', and 'Cancel'. Below this bar, the title 'Direct Deposit' is displayed in blue. The form contains several input fields:

- \* Status: A dropdown menu with a downward arrow.
- \* Account Type: A dropdown menu with a downward arrow.
- \* Sequence: A dropdown menu with a downward arrow.
- Amount: A text input field.
- Percent: A text input field.
- \* Routing Number: A text input field.
- \* Account Number: A text input field.
- Description: A text input field.

# Direct Deposit

## STEP 20a:

- Select **Active** as the status.

+ Add New   Edit   Delete   Refresh   Save   Cancel

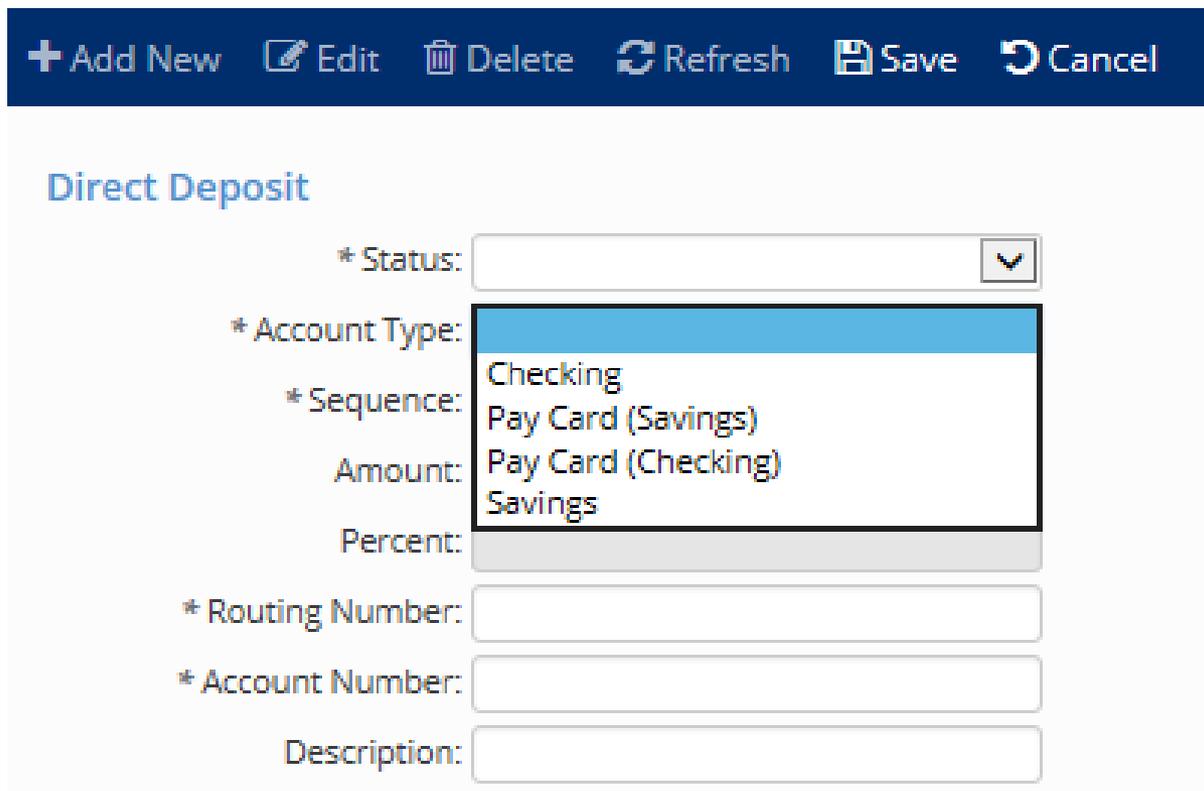
### Direct Deposit

\* Status:   
\* Account Type:   
\* Sequence:   
Amount:   
Percent:   
\* Routing Number:   
\* Account Number:   
Description:

# Direct Deposit

## STEP 20b:

- Use the drop down menu to select the Account Type for your direct deposit. The options are Checking, Pay Card (Savings), Pay Card (Checking), Savings.



The screenshot shows a software interface for adding a new direct deposit. At the top, there is a dark blue navigation bar with icons and labels for '+ Add New', 'Edit', 'Delete', 'Refresh', 'Save', and 'Cancel'. Below this, the title 'Direct Deposit' is displayed in blue. The form contains several fields: '\* Status:' with a dropdown arrow, '\* Account Type:' with a dropdown menu that is open, '\* Sequence:', 'Amount:', and 'Percent:' (all with empty input boxes), '\* Routing Number:', '\* Account Number:', and 'Description:' (all with empty input boxes). The dropdown menu for '\* Account Type:' is highlighted with a blue border and contains four options: 'Checking', 'Pay Card (Savings)', 'Pay Card (Checking)', and 'Savings'.

# Direct Deposit

## STEP 20c:

- Use the drop down menu to select the **Sequence**. If you are only entering one account, you will select “**Remaining Net.**” You must always have “Remaining Net” selected for one of the accounts entered. The portion of your paycheck not assigned to another sequence (as directed below) will be deposited into the account assigned as “Remaining Net.” Move to **STEP 20d** to complete the process for adding the account.
- If you would like your paycheck to be split between multiple accounts, select Sequence “1” for the second account you would like to add. When selecting a Sequence other than “Remaining Net,” you must enter an **amount** or **percentage** to be sent to that account for each pay period you are paid. The system will only let you submit a percentage or amount not both. To enter more accounts, continue selecting Sequence #s.

+ Add New Edit Delete Refresh Save Cancel

### Direct Deposit

\* Status:

\* Account Type:

\* Sequence:   
Remaining Net

Amount:

Percent:

\* Routing Number:

\* Account Number:

Description:

### Definitions of Sequences:

- **1 (2,3 etc)**– Sends a specific amount or percentage to a direct deposit account. This option is used if you are setting up more than one direct deposit account.
- **Remaining Net** – Sends all or remaining funds to a direct deposit account. Must be used for one account.

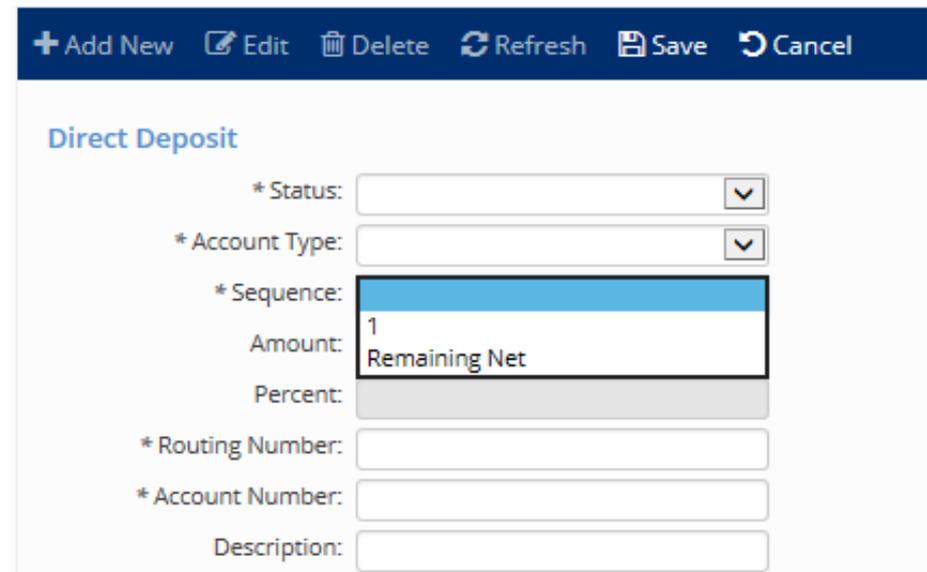
# Direct Deposit

## STEP 20d:

- Enter the **Routing** and **Account Number** associated with your direct deposit. Double check that the information you entered is correct. Incorrect information will cause a delay in receiving your paycheck. Routing numbers are always 9-digits long.

## STEP 20e:

- Click **SAVE** when you have completed entering the required direct deposit information for the account.
- To add another direct deposit account repeat **STEP 20**.
- If you have completed adding your direct deposit information, click **NEXT**.



The screenshot shows a software interface for adding a direct deposit account. At the top, there is a dark blue header bar with icons and labels for '+ Add New', 'Edit', 'Delete', 'Refresh', 'Save', and 'Cancel'. Below this, the title 'Direct Deposit' is displayed in blue. The form contains several fields:

- \* Status: A dropdown menu.
- \* Account Type: A dropdown menu.
- \* Sequence: A dropdown menu with '1' selected and highlighted in blue.
- Amount: A text input field containing 'Remaining Net'.
- Percent: A disabled (grayed out) text input field.
- \* Routing Number: A text input field.
- \* Account Number: A text input field.
- Description: A text input field.

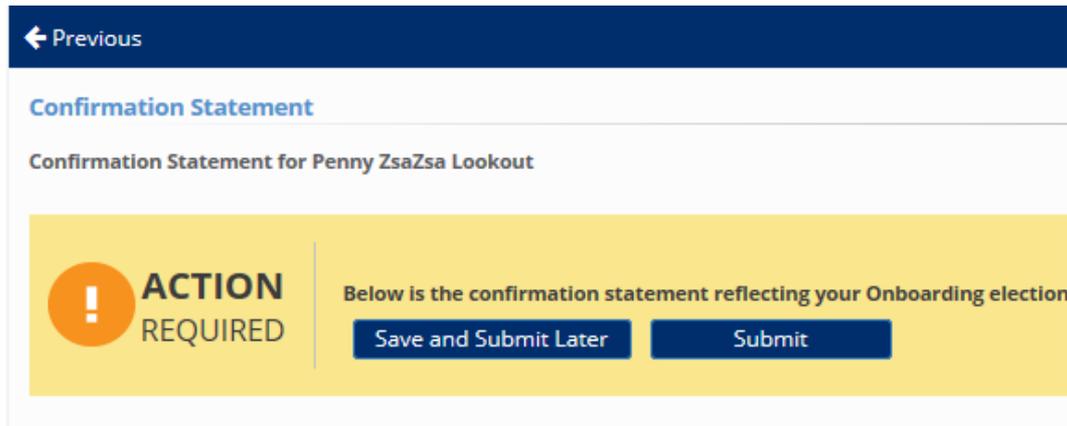
# Confirmation Statement

## STEP 21:

- Review all of the information you have entered for each onboarding form by scrolling down the Confirmation Statement page.
- If any changes are needed, use the **Previous** button to return to a specific section of the New Hire Onboarding Wizard to make edits to any information entered.

## STEP 22:

- Once you have reviewed the information and everything is correct, click **Submit**.
- If you need to save and return later, click **Save and Submit Later**.



## STEP 23:

- After the forms have been submitted, an email will be sent to your email account for you to **activate** your official NASDA Employee iSolved Account. Please activate your account within **72 hours** or the link will expire.
- If the link expires, please email your NASDA Supervisor for a new one.

# Additional NASDA Onboarding Instructions and Tutorials

There are other tutorial videos that are available to help with your onboarding process. These videos can be found on our YouTube Channel, NASDA NASS or click the links below to view each video. They also can be found at [www.nasda.org/nass](http://www.nasda.org/nass) under **Personnel Resources>Handbooks**

## **iSolved Activation Account Tutorial**

<https://www.youtube.com/watch?v=HFcsa4CSAwY&t=8s>

## **iSolved Time Training**

<https://www.youtube.com/watch?v=x-qALKt1Zhg&t=695s>