



Quick Reference Guide for Onboarding Workers

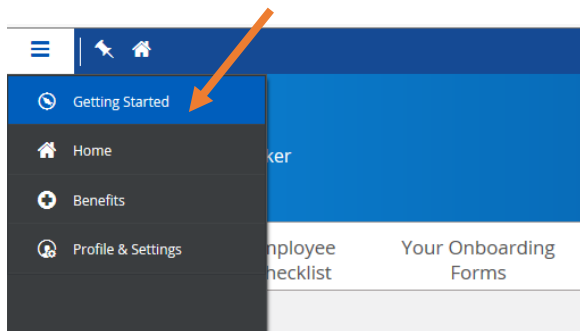
How to log in for the first time:

Your login credentials will be sent to you by your Program Specialist, upon first login you should be prompted to change your password. Save this password somewhere safe.

If you ever need to reset this password, you will need to have your email preferences updated to allow for external emails by verifying your email address. Please see the section further down in this guide regarding how to verify your email.

Completing your forms:

When you log in each time, the system will take you to the Getting Started page where the required forms are located. However, if you navigate away from that page and need help returning, you can click on “Getting Started” in the menu to return to that page.



When you are filling out the standard forms (address, name and marital status, etc.), many fields ask for a Start and End date. This refers to the start and end date of the field, NOT of your assignment. **Today's date will auto-populate, please do not change it. Do NOT enter an end date.**

Mctester, Test
Status: Pre-Start Employee Number: 100702

Address Information

+ Add - Delete

Type*	Country Code*	Address Line 1*	Address Line 2	Address Line 3	Address Line 4	City*	County	State*	Zip Code*	Start Date	End Date	Payroll Mailing
Primary...	United States of...	123 Main St				Boston		Massac...	01234	Jan 22/2018		<input type="checkbox"/>

Here are some helpful hints for specific forms:

Address

You should only have one primary address in the Address field. In order to enter your address, click on the empty box under Address Line 1 and begin to fill in your information in the required fields. Again, **do not update the Start Date field.**

Mctester, Test
Status: Pre-Start Employee Number: 100702

Address Information

+ Add X Delete

Type*	Country Code*	Address Line 1*	Address Line 2	Address Line 3	Address Line 4	City*	County	State*	Zip Code*	Start Date	End Date	Payroll Mailing
Primary...	United States of...	123 Main St				Boston		Massac...	01234	Jan 22/2018		<input type="checkbox"/>

If you need to enter a second address, click the Add button and then you can enter your secondary address information.

Mctester, Test
Status: Pre-Start Employee Number: 100702

Address Information

+ Add X Delete

Type*	Country Code*	Address Line 1*	Address Line 2	Address Line 3	Address Line 4	City*	County	State*	Zip Code*	Start Date	End Date	Payroll Mailing
Primary...	United States of...	123 Main St				Boston		Massac...	01234	Jan 22/2018		<input type="checkbox"/>

Ensure that there is one and only one address labeled as Primary; if there are multiple lines, it can cause an error.

Confidential Information Form:

Please ensure your social security number and date of birth are correct. If they are not, it could delay your payment.

Pay Option form:

If you only wish to enter one account for Direct Deposit, click the "Remainder" box and leave the Amount box blank.

See screen shot below on next page

New Direct Deposit

Sample check image i

Remainder

Pay Method *

Routing Number *

Financial Institution

Account # *

Reenter Account # *

Amount *

Is Deposit in Percentage

OK Cancel

If you don't want direct deposit (prefer an actual check), submit the Direct Deposit form without filling in any account information, but make a note that you would like a live check:

Pay Option : Smith, Steve - 100703

Direct Deposit

Smith, Steve
Status: Pre-Start Employee Number: 100703

Direct Deposit Information
This is your current direct deposit information. Adding or modifying accounts will change where your pay will be deposited.

Pay will be added to your accounts based on the priority you set. Any pay remaining will be deposited into your remainder account. An amount is required for all accounts except your remainder account.

+ Add ✕ Remove ⬆ Move Up ⬇ Move Down

Priority	Remainder	Pay Method	Routing Number	Financial Institution	Account #	Amount	Is Deposit i...	View/Edit

Comment

Add comment to the employee's file.

I want a live check

Form W4:

You must complete the Address and Confidential Information forms prior to the Form W4. The form will auto-populate the address and social security number information you entered prior. If the form shows a blank SSN or Address, go back and complete those forms prior to completing the W4.

- None of the allowance worksheets are required. If you do choose to use the worksheet, it will not autofill the number of allowances in Line 5, you need to enter that number manually.
- In Line 5, make sure to click directly in the center of the field to enter a number
- The form will auto-populate your marital status as Single, so you may need to update that field accordingly.
- The form will either allow you to fill in Line 5 or Line 7, not both.

506250765

3 Single Married Married, but withhold at higher Single rate.

Note: If married, but legally separated, or spouse is a nonresident alien, check the "Single" box.

4 If your last name differs from that shown on your social security card, check here. You must call 1-800-772-1213 for a replacement card.

5 Total number of allowances you're claiming (from the applicable worksheet on the following pages) 5

6 Additional amount, if any, you want withheld from each paycheck 6 \$

7 I claim exemption from withholding for 2018, and I certify that I meet **both** of the following conditions for exemption.

- Last year I had a refund of **all** federal income tax withheld because I had **no** tax liability, **and**
- This year I expect a refund of **all** federal income tax withheld because I expect to have **no** tax liability.

If you meet both conditions, write "Exempt" here ▶ 7

and, to the best of my knowledge and belief, it is true, correct, and complete.

Federal tax form 2018 : Demo, Johnny - 101745

tax withholding more accurately. Consider

Separate here and give Form W-4 to your employer. Keep the worksheet(s) for your records.

Form **W-4** Department of the Treasury Internal Revenue Service

Employee's Withholding Allowance Certificate OMB No. 1545-0074

Whether you're entitled to claim a certain number of allowances or exemption from withholding is subject to review by the IRS. Your employer may be required to send a copy of this form to the IRS.

2018

1 Your first name and middle initial Last name 2 Your social security number

Johnny Demo 252569999

Home address (number and street or rural route)

123 Main Street

City or town, state, and ZIP code

Weehawken, NJ, 08222

3 Single Married Married, but withhold at higher Single rate.

Note: If married filing separately, check "Married, but withhold at higher Single rate."

4 If your last name differs from that shown on your social security card, check here. You must call 800-772-1213 for a replacement card.

5 Total number of allowances you're claiming (from the applicable worksheet on the following pages) 5

6 Additional amount, if any, you want withheld from each paycheck 6 \$

7 I claim exemption from withholding for 2018, and I certify that I meet **both** of the following conditions for exemption.

- Last year I had a refund of **all** federal income tax withheld because I had **no** tax liability, **and**
- This year I expect a refund of **all** federal income tax withheld because I expect to have **no** tax liability.

If you meet both conditions, write "Exempt" here ▶ 7

Under penalties of perjury, I declare that I have examined this certificate and, to the best of my knowledge and belief, it is true, correct, and complete.

Employee's signature (This form is not valid unless you sign it) ▶ Date ▶ 08/19/2018

8 Employer's name and address (Employer: Complete boxes 8 and 10 if sending to IRS and complete boxes 8, 9, and 10 if sending to State Directory of New Hires.) 9 First date of employment 10 Employer identification number (EIN)

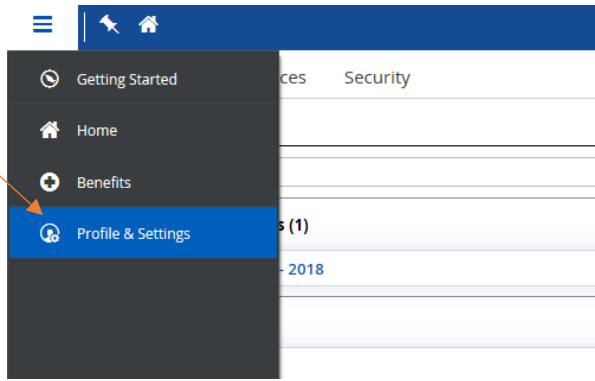
For Privacy Act and Paperwork Reduction Act Notice, see page 4. Cat. No. 10220Q Form **W-4** (2018)

- Lines 8, 9, and 10 (below the signature) are not required, nor is the Personal Allowance worksheet.

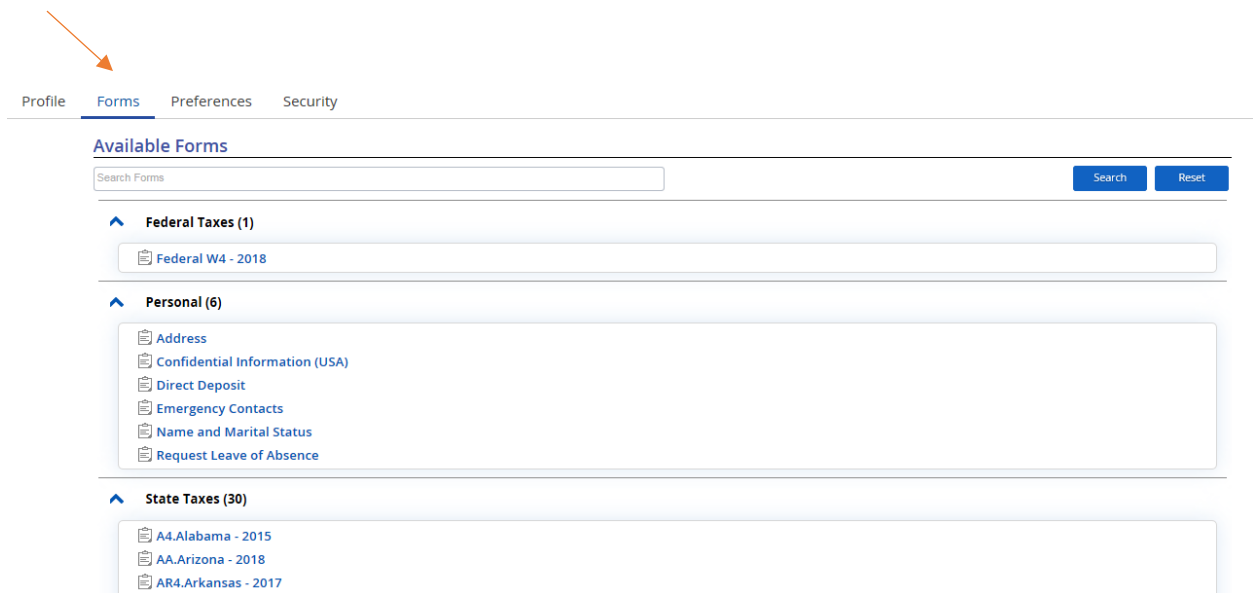
State Tax forms:

The system will automatically give you access to the state withholding form for your work state. If you live and work in the same state, no further action is needed.

If you live and work in different states, then you may need to fill out a second state tax form for your state of residence. If this is needed, please navigate to Profile and Settings in the Menu:



Then click on the Forms tab:

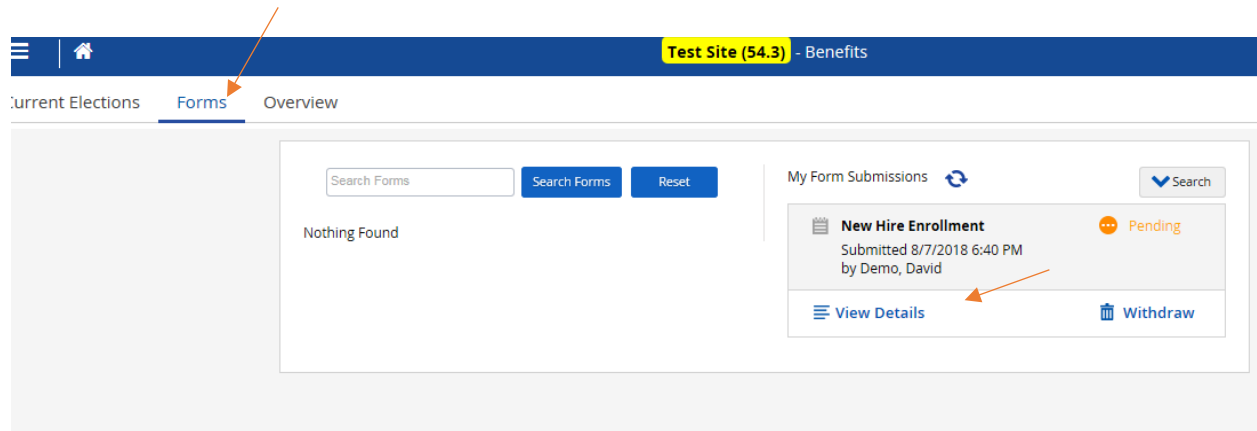


Then scroll down to the relevant state form, complete it, and submit the form.

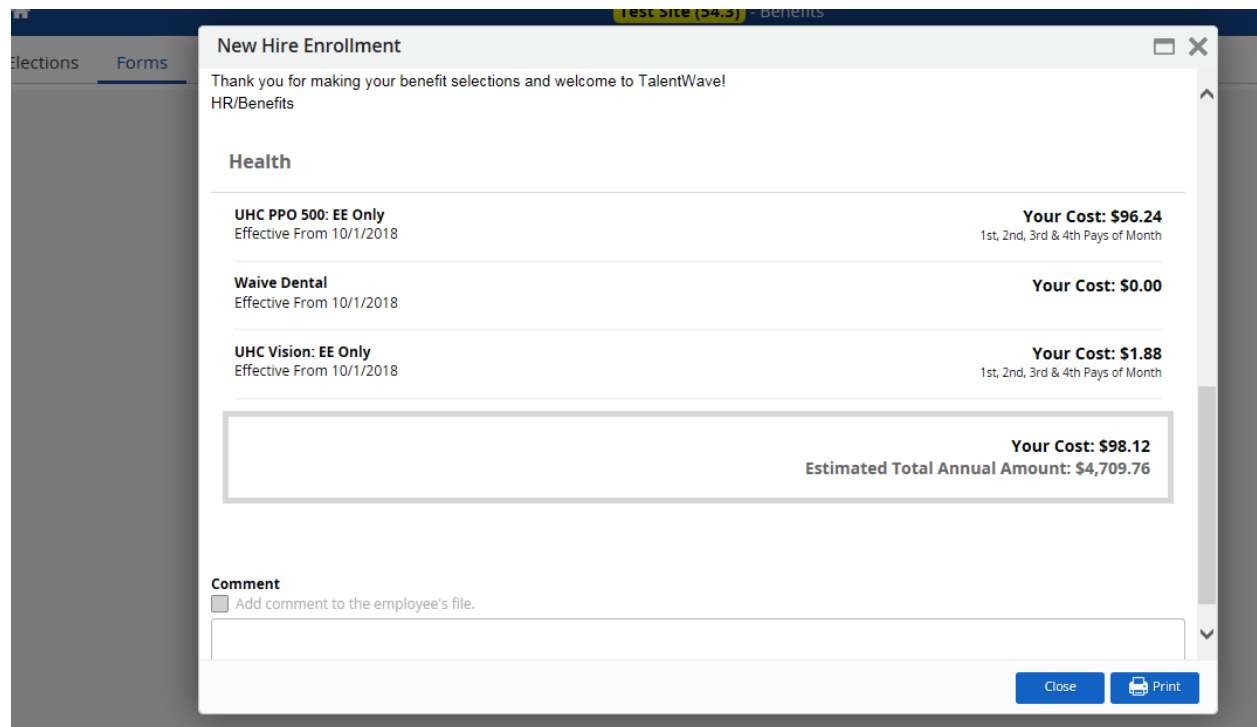
Please do not submit a state tax form for any states where you do not live or work.

Benefits:

Once you have completed your enrollment, you may want to review the status of your benefits. In order to see those, click on Benefits in the main menu (top left of the page), then navigate to the Forms section. Your completed enrollment will show under My Form Submissions. If you don't see anything there, your enrollment did not go through.



- If you click on View Details, you will be able to see the details and costs of your selections:



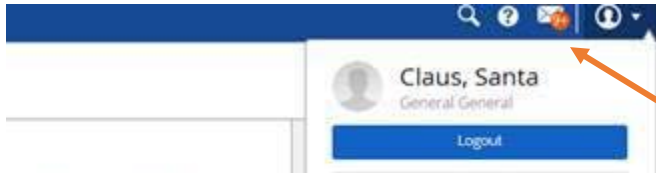
Wage Acknowledgment Form:

This form will be visible to you in your Message Center, located at the top right corner of the screen – the icon looks like an envelope. Please review it and sign the form once you ensure the information is correct. If you see incorrect information on the form, please contact your Program Specialist.

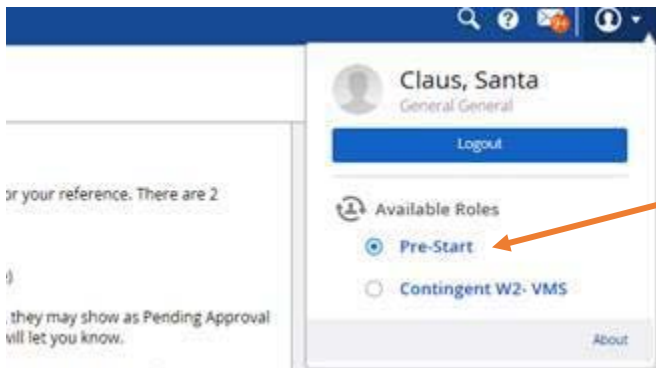
Other helpful hints:

- When forms are submitted, they will often show at first in a “Pending Approval” status, even if no approval needs to take place. If you log out and back in, they should show as completed

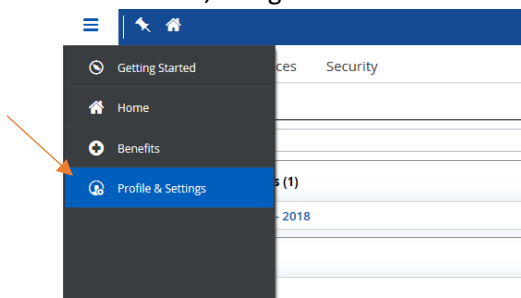
- If you need to access copies of the completed forms, they will be available in the message center, which can be accessed in the top right corner of the screen



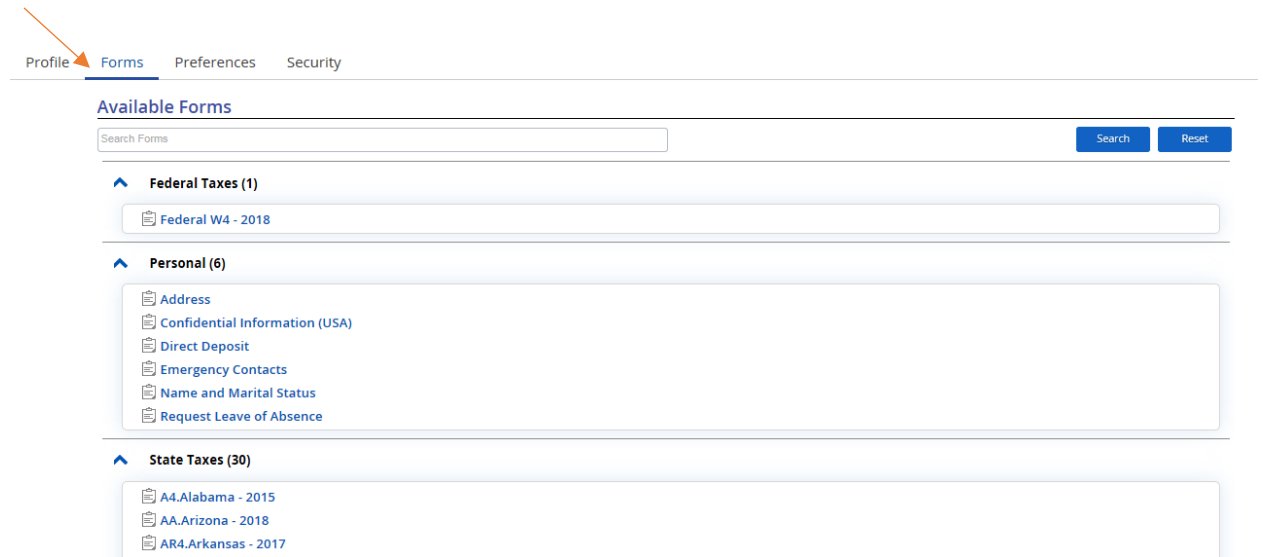
- If you get stuck on a form and are unable to submit, try closing out of the form without saving changes, then go back into the form and try again.
- If you see a green or red message pop up in the bottom right corner that won't go away, click on the message and it should fade out.
- If your assignment has already begun and you do not see a Getting Started page or any of the onboarding forms, you may need to switch back into the Pre-start role. Go to the top right corner, click on the person icon, then make sure Pre-Start is the selected role. That will give you access to the required paperwork



- If you already filled out the forms on the Getting Started page, but need to update a piece of information, navigate to the Profile and Settings page, then Forms:



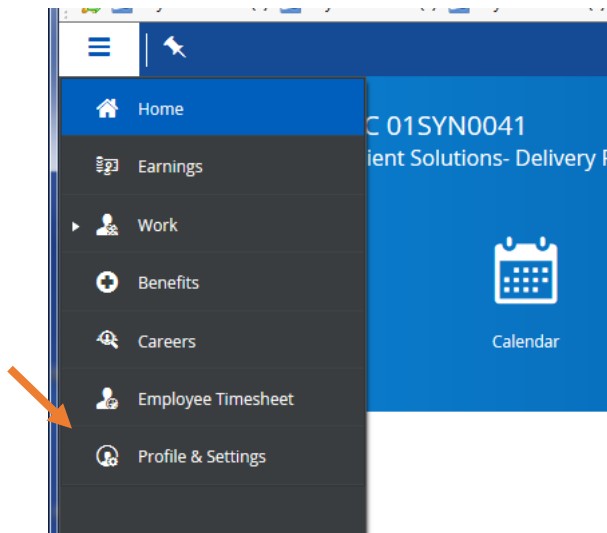
Then click on the Forms tab:



You can then update whatever information is needed (Address, Direct Deposit, taxes, etc).

Verifying your Email Address:

1. Log in, then navigate to "Profile and Settings"



2. Review your Contact Information on the first tab and click "Edit"



3. Update your email address(es) and click the checkbox for Alerts to indicate where you would like to receive alerts. Add new email addresses as needed. **Note:** if you are only accessing the system in the "TalentWave Employee" role, you will likely want to use your personal email. If you have other system roles, we would recommend using your TalentWave email as all alerts will come to that address. Personal Email is the only "type" available at this time. This has no impact.



4. Click Save, then go back in to Edit the contact information, and click Verify. You'll then get an email to your address asking you to confirm the address is valid. Click the link in the email and once you receive confirmation that it was successfully verified, your email address should now be set up to receive all alerts including Forgot Password. You will get two emails, verify each of them.



DAYFORCE | HCM

Dear Lisa,

You (or an authorized party at your company) have entered lmiller@talentwave.com as a contact email address for Dayforce HCM. To complete the process, we need to verify that this email address belongs to you. **Please verify your email address by clicking the button below.**

VERIFY YOUR EMAIL

DAYFORCE | HCM

Dear Lisa,

You (or an authorized party at your company) have entered lmiller@talentwave.com as a contact email address for Dayforce HCM. To complete the process, we need to verify that this email address belongs to you. **Please verify your email address by clicking the button below.**

VERIFY YOUR EMAIL

Go back to Edit - Contact Information- the email you chose should now look like this: Alert checked & Verified checked.

myoung@talentwave.com

