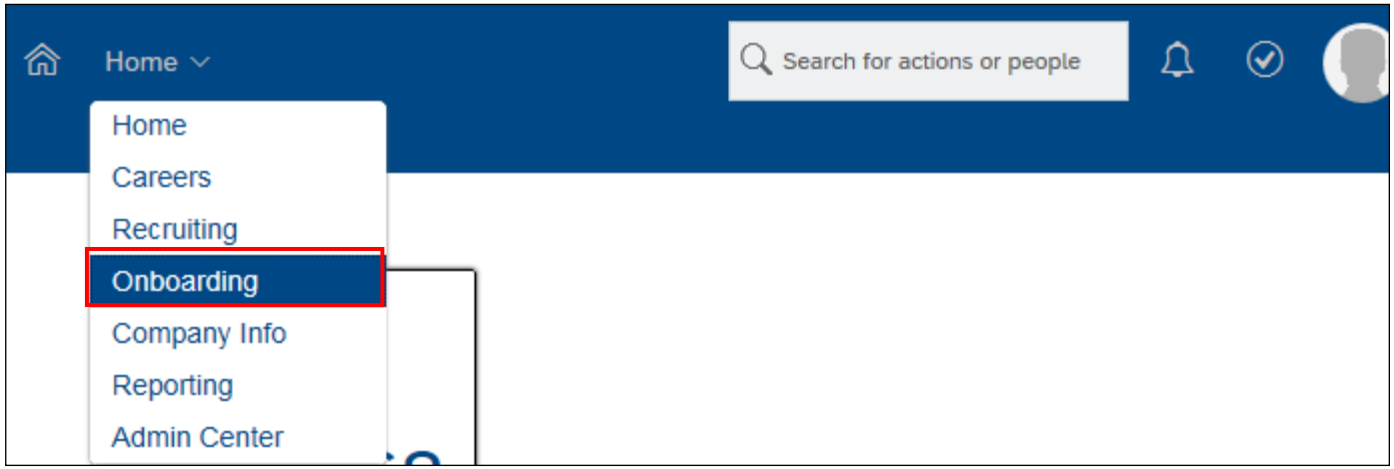
Access Onboarding Forms in the Document Center

Overview

Employment forms that a successful candidate completes as part of the onboarding process are stored in the SuccessFactors Document Center. Applicable benefit forms must be accessed in the Document Center so that relevant information can be enterend into SAP as part of the Onboarding Action.

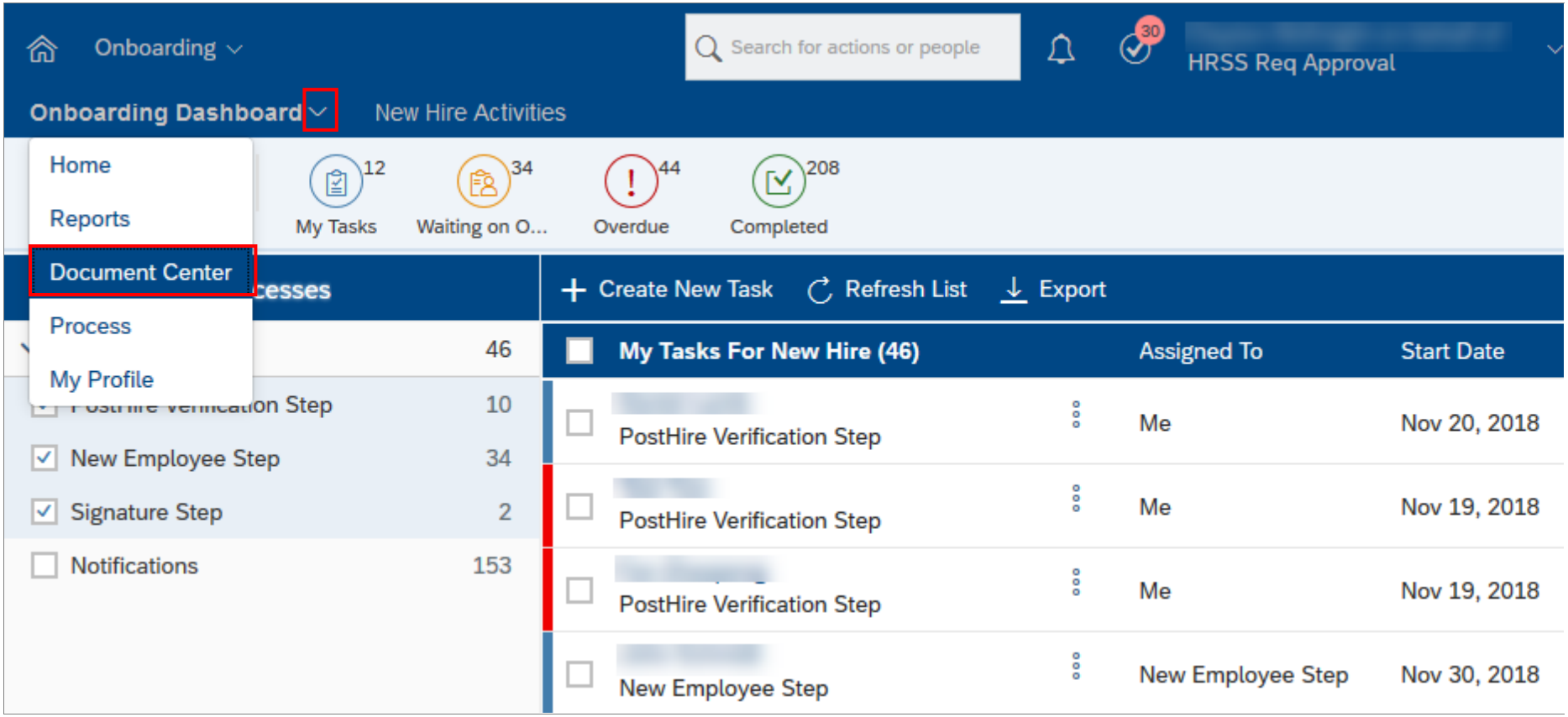
Procedure

1. Click the **Home** menu and select **Onboarding** from the drop-down.



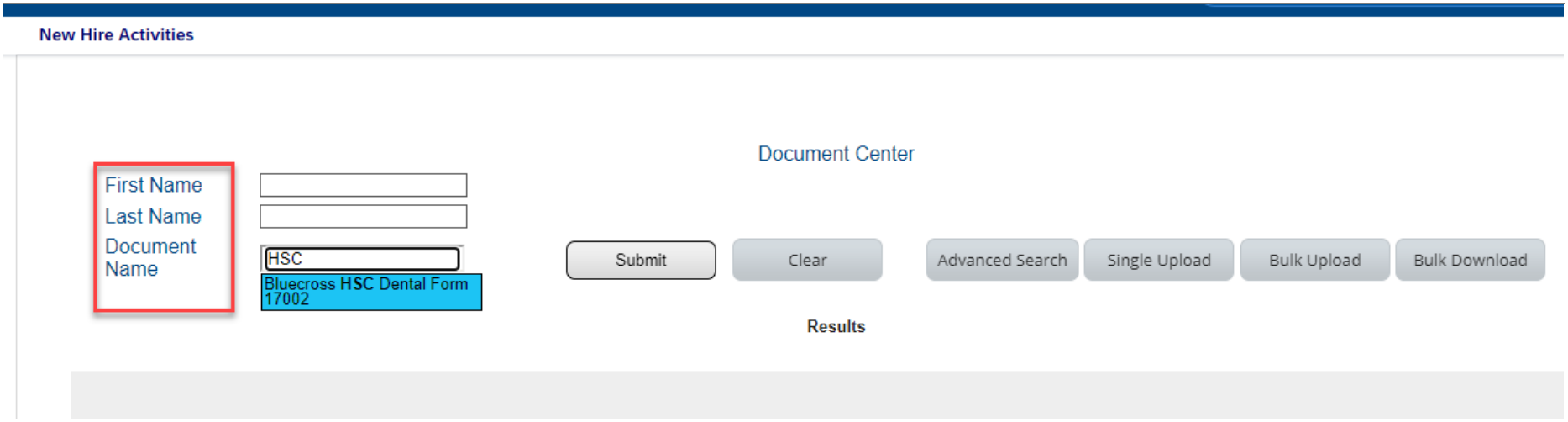
The *Onboarding Dashboard* screen appears.

2. Click beside the **Onboarding Dashboard** menu.
3. Select **Document Center** from the drop-down.



The *Document Center* screen appears.

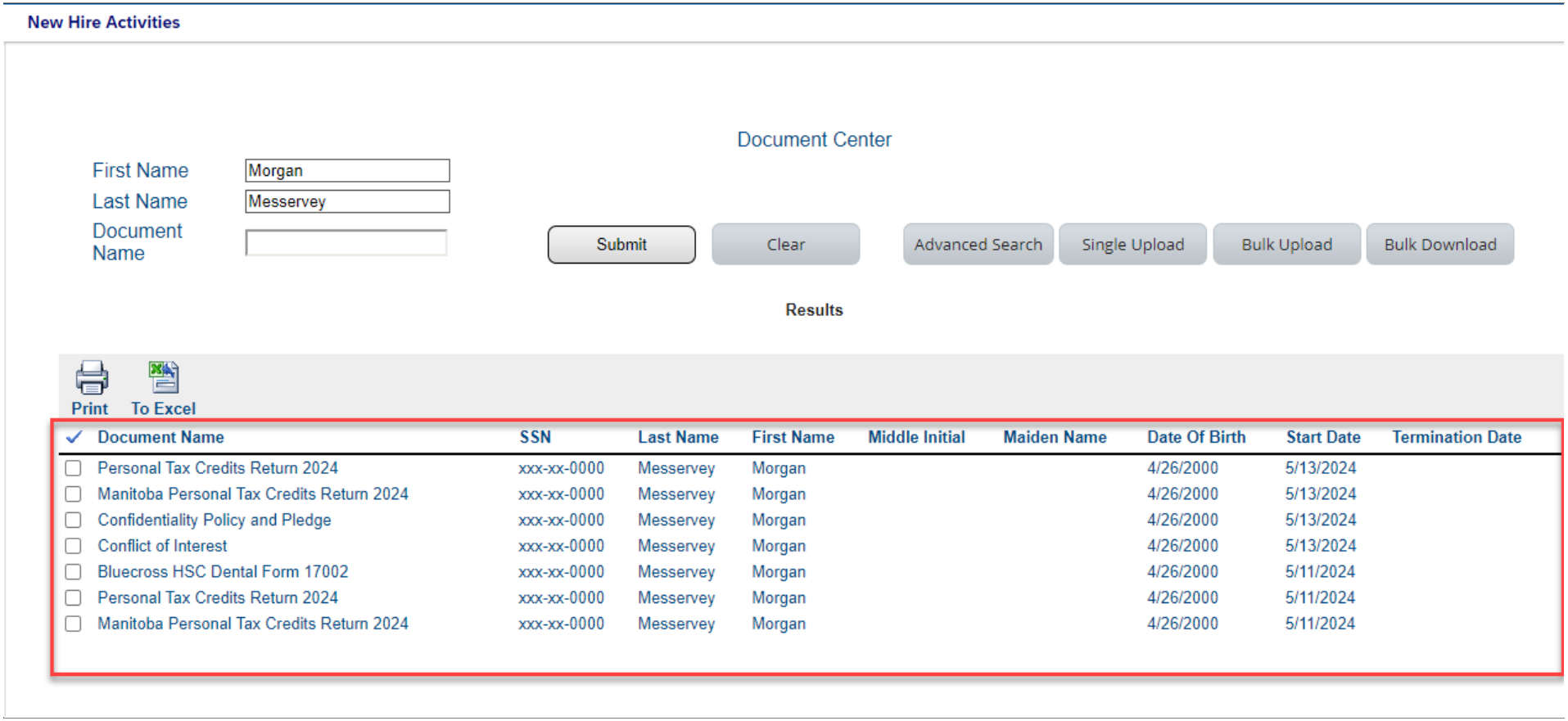
4. Enter information in one or more of the search criteria fields:
   - Enter name(s) in the **First Name** and/or **Last Name** fields (entering both a first and last name will narrow the search results).
   - Enter a document name in the **Document Name** field to search for specific document(s) (e.g.Blue Cross).
     - As you type in the field, the system proposes document names to select directly below the field (see screenshot below).
   - Leave all fields blank to display *all* documents for *all* employees in the Document Center.
5. Click **Submit**.



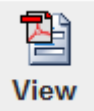
Note: You can click the Advanced Search button to access additional search criteria options if necessary.

The results of your search display under the Results heading.

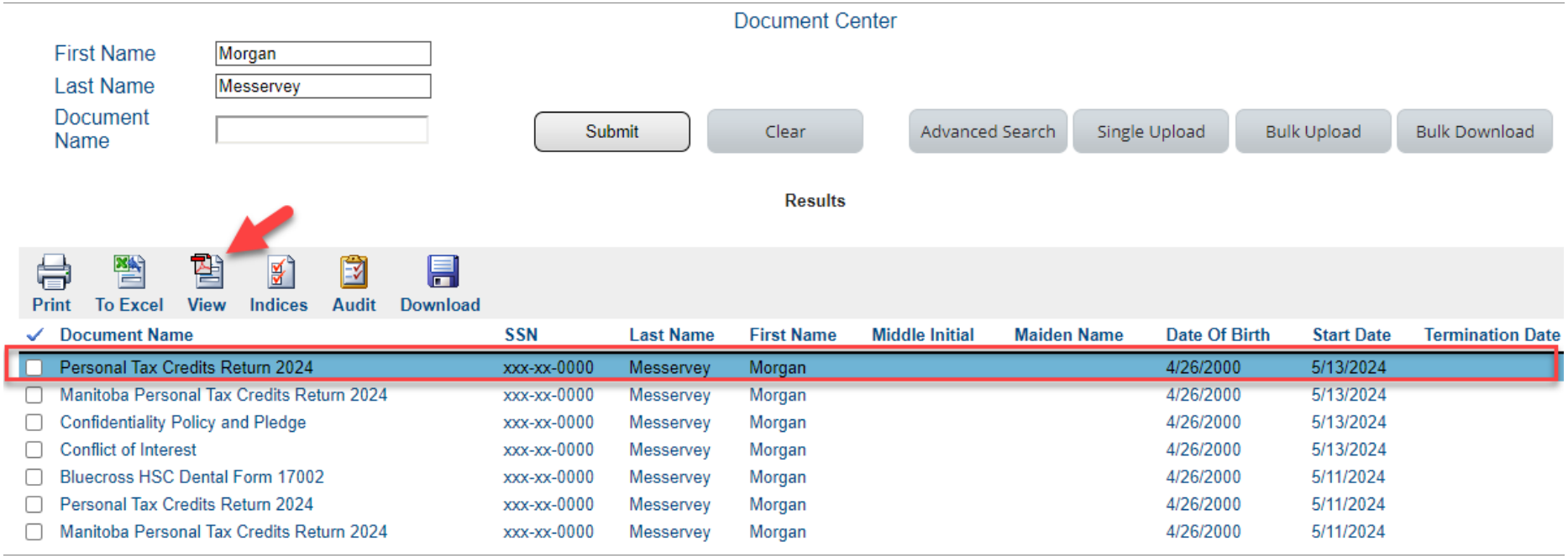
6. Click a document row to activate viewing and downloading options.



After you click a document row, the row highlights and additional viewing and downloading options display.

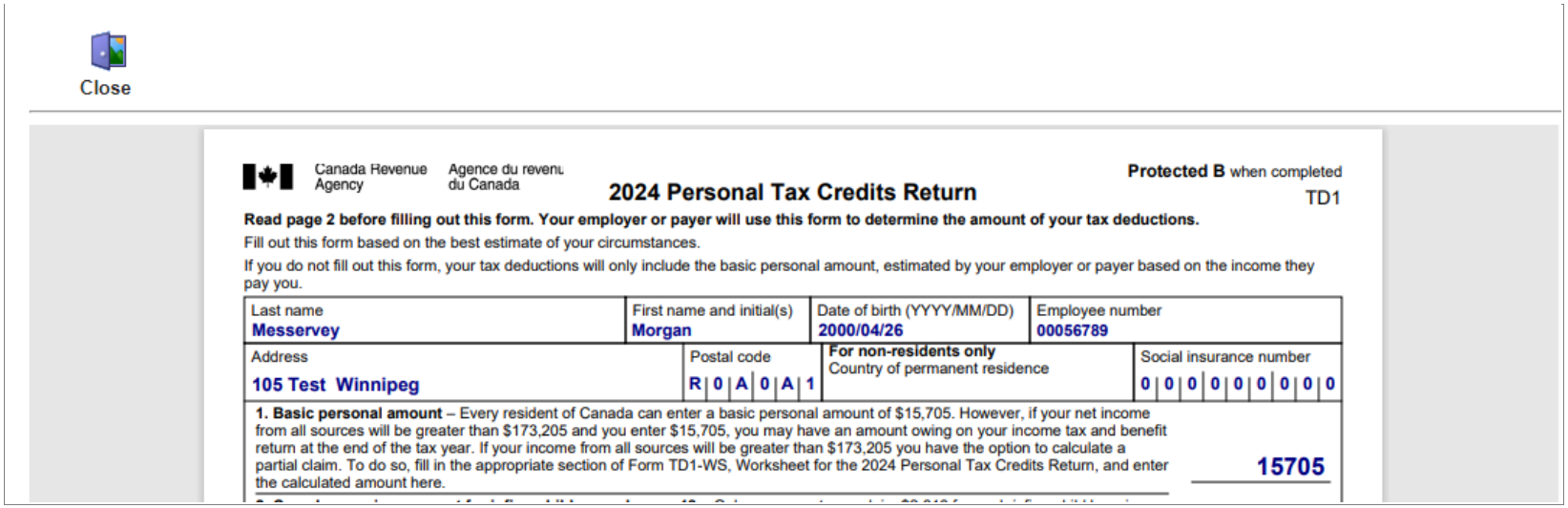
7. Click 

to display the selected document in a new browser window.



Note: Click on “Download” or “Print” to download or Print the documents respectively.

8. Review the document as required.



9. Click Close when you are finished with the document.

   Note: If any forms need to be corrected, process the onboarding action first, then refer to the Processing Tax Information and Benefit Forms Revision Requests documents, for how to request corrections to the tax and benefit forms.

10. Repeat steps 6 and 7 for each additional document you wish to display until you have reviewed all necessary documents.

Next Steps

After the relevant information from employment forms is entered into SAP during the Onboarding Action, and the Onboarding Action is completed, the employee is automatically moved into the “Hired” segment of the Talent Pipeline in SuccessFactors. This completes the hiring process.