

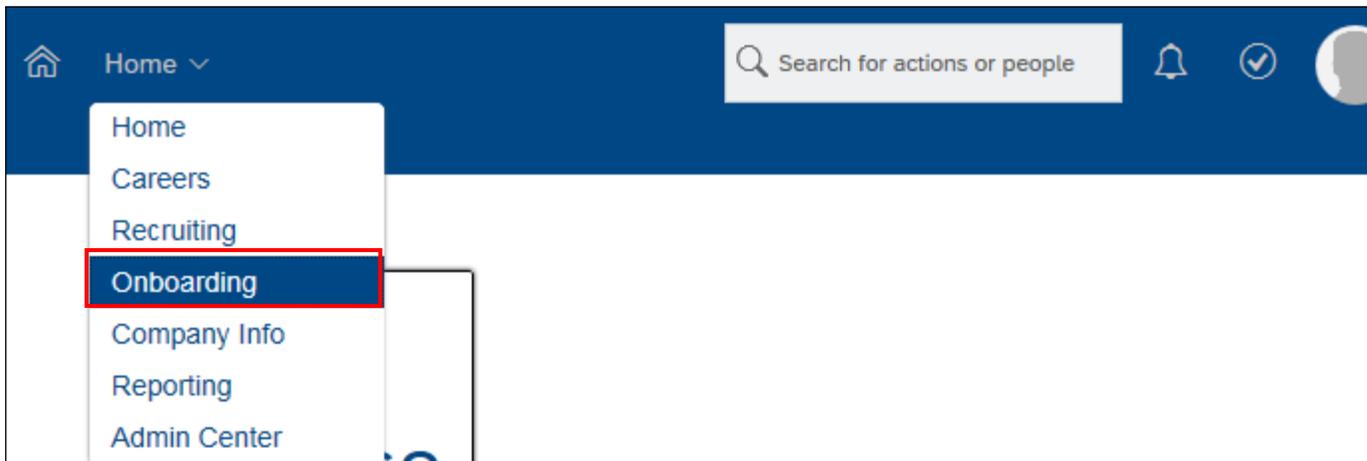
Access Onboarding Forms in the Document Center

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 entered 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 screenshot shows the SuccessFactors Onboarding Dashboard. At the top, there is a navigation bar with 'Onboarding' and a search bar. Below this, the 'Onboarding Dashboard' menu is expanded, showing options like Home, Reports, Document Center (highlighted), Process, and My Profile. The main dashboard area displays a table of tasks for new hires, with columns for 'My Tasks For New Hire (46)', 'Assigned To', and 'Start Date'. The table lists several 'PostHire Verification Step' tasks assigned to 'Me' and one 'New Employee Step' task assigned to 'New Employee Step'.

My Tasks For New Hire (46)	Assigned To	Start Date
<input type="checkbox"/> PostHire Verification Step	Me	Nov 20, 2018
<input type="checkbox"/> PostHire Verification Step	Me	Nov 19, 2018
<input type="checkbox"/> PostHire Verification Step	Me	Nov 19, 2018
<input type="checkbox"/> New Employee Step	New Employee Step	Nov 30, 2018

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**.

New Hire Activities

Document Center

First Name

Last Name

Document Name

Bluecross HSC Dental Form 17002

Submit Clear Advanced Search Single Upload Bulk Upload Bulk Download

Results

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.

New Hire Activities

Document Center

First Name
Last Name
Document Name

Results

Print To Excel

<input checked="" type="checkbox"/>	Document Name	SSN	Last Name	First Name	Middle Initial	Maiden Name	Date Of Birth	Start Date	Termination Date
<input type="checkbox"/>	Personal Tax Credits Return 2024	xxx-xx-0000	Messervey	Morgan			4/26/2000	5/13/2024	
<input type="checkbox"/>	Manitoba Personal Tax Credits Return 2024	xxx-xx-0000	Messervey	Morgan			4/26/2000	5/13/2024	
<input type="checkbox"/>	Confidentiality Policy and Pledge	xxx-xx-0000	Messervey	Morgan			4/26/2000	5/13/2024	
<input type="checkbox"/>	Conflict of Interest	xxx-xx-0000	Messervey	Morgan			4/26/2000	5/13/2024	
<input type="checkbox"/>	Bluecross HSC Dental Form 17002	xxx-xx-0000	Messervey	Morgan			4/26/2000	5/11/2024	
<input type="checkbox"/>	Personal Tax Credits Return 2024	xxx-xx-0000	Messervey	Morgan			4/26/2000	5/11/2024	
<input type="checkbox"/>	Manitoba Personal Tax Credits Return 2024	xxx-xx-0000	Messervey	Morgan			4/26/2000	5/11/2024	

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



- Click **View** to display the selected document in a new browser window.

Document Center

First Name

Last Name

Document Name

Results

Print To Excel View Indices Audit Download

Document Name	SSN	Last Name	First Name	Middle Initial	Maiden Name	Date Of Birth	Start Date	Termination Date
<input type="checkbox"/> Personal Tax Credits Return 2024	xxx-xx-0000	Messervey	Morgan			4/26/2000	5/13/2024	
<input type="checkbox"/> Manitoba Personal Tax Credits Return 2024	xxx-xx-0000	Messervey	Morgan			4/26/2000	5/13/2024	
<input type="checkbox"/> Confidentiality Policy and Pledge	xxx-xx-0000	Messervey	Morgan			4/26/2000	5/13/2024	
<input type="checkbox"/> Conflict of Interest	xxx-xx-0000	Messervey	Morgan			4/26/2000	5/13/2024	
<input type="checkbox"/> Bluecross HSC Dental Form 17002	xxx-xx-0000	Messervey	Morgan			4/26/2000	5/11/2024	
<input type="checkbox"/> Personal Tax Credits Return 2024	xxx-xx-0000	Messervey	Morgan			4/26/2000	5/11/2024	
<input type="checkbox"/> Manitoba Personal Tax Credits Return 2024	xxx-xx-0000	Messervey	Morgan			4/26/2000	5/11/2024	

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

- Review the document as required.

Close

Canada Revenue Agency Agence du revenu du Canada

2024 Personal Tax Credits Return

Protected B when completed TD1

Read page 2 before filling out this form. Your employer or payer will use this form to determine the amount of your tax deductions.

Fill out this form based on the best estimate of your circumstances.

If you do not fill out this form, your tax deductions will only include the basic personal amount, estimated by your employer or payer based on the income they pay you.

Last name Messervey	First name and initial(s) Morgan	Date of birth (YYYY/MM/DD) 2000/04/26	Employee number 00056789
Address 105 Test Winnipeg	Postal code R 0 A 0 A 1	For non-residents only Country of permanent residence	Social insurance number 0 0 0 0 0 0 0 0 0

1. Basic personal amount – Every resident of Canada can enter a basic personal amount of \$15,705. However, if your net income from all sources will be greater than \$173,205 and you enter \$15,705, you may have an amount owing on your income tax and benefit return at the end of the tax year. If your income from all sources will be greater than \$173,205 you have the option to calculate a partial claim. To do so, fill in the appropriate section of Form TD1-WS, Worksheet for the 2024 Personal Tax Credits Return, and enter the calculated amount here.

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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.