



From Welcome To Farewell: Maximising The Employee Life Cycle [Part 1: Onboarding]

Session FAQs



Global

Do we need a platinum subscription to use the onboarding process?	No, you can onboard an employee on all subscriptions.
Is the onboarding customisation feature only available on the platinum subscription?	Yes, it is only available on the platinum subscription.
How do we know if we hold a platinum subscription?	Please go to Dashboard > Feature set up.
Is it possible to have more than 2 managers?	At this time, only a primary and secondary manager can be listed.
Do both primary and secondary managers get the request for leave?	If you have 2-level leave approval set up, both of them will receive an email notification. Otherwise, only the primary manager will receive the email. The secondary manager can view and approve the leave request in their leave management tab.
Do timesheets go to both the primary and secondary manager?	Timesheet requests only go to primary managers, unless they are on leave.
Will a primary manager have access to the pay details tab under the Employee Profile?	You will have to grant access via the Custom Security Settings.
Are we able to set up another employment status as "labour hire" to reduce the paperwork during the hiring process?	Although do not have a "labour hire" category, you can use the 'quick add' function. They will not be required to provide their banking, tax and superannuation details and you can also opt not to sync them through the payroll. Find out more here .
When approving timesheets, is there a way to see only direct reports?	If you are a manager, you will only be able to see your direct and indirect reports. If you are an admin, by default you will be able to see all timesheets. It is currently not possible for admins to filter based on the reporting line.
Is it possible to add another person to the performance review process?	Not at this moment. However, you could explore using the 1:1 module.
If an additional custom field is added after implementation, will current employees on the platform be required to complete the custom field?	Yes, however you can prevent an email notification from being sent to current employees.

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How can I create and save check-in and exit surveys for employees?	You may utilise the 'custom surveys' function for check-in surveys. Find out more here . For exit surveys, please find out more here .
Can I customise the onboarding process based on work location or department?	Yes, you can customise the checklists and fields.
Can the appointed manager run reports for custom fields?	Yes, you can enable this via 'security permissions'.
Is there a way to get existing team members who are already onboarded to add more information if we were to upgrade to 'premium' and get 'custom surveys'?	You can publish an 'announcement' via your dashboard and create a task for all employees to complete. You can then utilise the 'custom report' function to export these responses.
Can I align the tabs for both employees and independent contractors in the employee file?	Independent contractors and employees will have different amounts of information in their employee file. At this moment, you will not be able to add extra fields. However, you can use 'custom fields' for employees to add additional fields. Please find more information here .
Is there a section for diversity and inclusion data?	You will need to manually input this as a 'custom field'. You can also opt to create a 'custom survey' if appropriate.
Where can I add travel allowance for an employee?	You can add this as a 'custom field'.
How can I view where employees are at in their onboarding journey and send manual triggers for those who have not completed the needed tasks before their start date?	You can view your employee's onboarding progress via the 'Employee Onboarding' widget in your dashboard. There are no manual prompts currently available.
Can I add my employee to a team after they have been onboarded?	Yes, you can do this within the 'employee file' and employees can be added to multiple teams
My independent contractor is sitting under the wrong place in the organisation chart. Where can I input their reporting manager?	Although you're unable to move people within the organisation chart, you can list a 'report to' under their job history. Find out more here .
Where do I find the email template?	You can find it under the 'Beta' feature icon at the top of your platform. Find out more here .
How do I edit a template?	Please ensure you have enabled the email templates beta. Find out more .
How can I set up additional email templates or customise the email templates available?	Within the email templates beta, you can clone or edit the existing email template options. However, it is not currently possible to add additional email templates. Find out more here .

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Can I add probation reviews as part of the onboarding checklist?	You can include a task to initiate a probation review. However the creation of this review will need to be done manually under the 'review' module.
Where can we get the onboarding and offboarding checklist?	You can use this example . Alternatively, we have free induction and onboarding checklist templates available here .
How do I change a certification from mandatory to optional?	You are currently not able to make configuration changes to a published certification. You will need to archive your existing template and re-create it and set it to optional.
How do we allow for a manager to initiative a request to hire a new person for their team?	You can do this via your Employee Requisitions feature. Find out how you can set it up here and how you can manage this feature here .
How do I allow an employee to continue their onboarding process if they can't take action on a mandatory certification?	You can remove certifications from the onboarding workflow. This is done via Settings > Customisations > Employee File.
How do I access custom branding?	Custom branding is only available on the platinum subscription and you can access it via Settings > Customisation.
How can I run a report for a specification certification rather than all certifications?	You can do so via Reports > Compliance > Certifications.
Is it possible to trigger separate checklists to the same employee but at different times?	You can configure this within the checklist where you can set the dates for it to be triggered.
Can I delete Employment Hero policies within the HR documents so that it only shows the policy documents of the organisation?	No, Employment Hero policies cannot be deleted.
How do I publish policies in draft?	Click on Actions > Share.
Are employees prompted to acknowledge the Fair Work information statement as part of the onboarding process?	They are not prompted, but the document is available to all employees that have been added to Employment Hero.
How do I link a certification to a specific team?	When creating the certification, you will be given an option to share the certification with a specific team. Learn how in this video .
Where can I check whether a new starter has acknowledged a policy?	Please go to Reports > Compliance reports > Policies and Inductions.
Can I send policies to new staff only?	At this moment you can't send it to new employees only. However, you can create a new team specifically for new employees and assign the policy to this team or individually add them in.

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Does Employment Hero integrate with Asana?	At this moment, we do not have an open integration with Asana.
How can I access archived policies?	There is a setting at the top right of the screen for you to toggle to see archived policies.
How do I change line managers for an employee without losing any employee data?	You can do so via Employee File > Employment Details.
Why is the industry job title field mandatory?	We've added this to help organisations with their job titles and keep them in-line with industry standards.
Can we change the order of tasks in a checklist?	The order of tasks will appear in the order as they are being added and cannot be re-ordered.
Can the system send me a reminder when a probation period is close to the end?	Yes, you can do so via Settings > Email Settings > End of Probation.
Is the anniversary date 12 months from the day they start with the company?	Anniversary dates are 12 months from the Employment Start Date under the Employment Details tab.
Who can access to award option?	The award option is provided to those who have Payroll Plus, the top-tier payroll subscription. It will reflect once you have awards installed.
Can I modify payment details later?	Yes, you can amend the pay details at a later date. We typically recommend adding a new salary record if the changes are some time apart. However if it is to rectify a mistake then you can simply adjust it.
Will the employee not receive the contract until it is signed by the nominated person?	Yes, that is right.
Does Employment Hero have an automated customised email to employees when they are offboarded?	Yes, there is a default email. If you subscribe to Platinum, you can edit the template via Settings > Email Templates.
Can I send email templates as a test to see what they look like?	You can do so via Templates > Action > Send Test.
Can I delete a policy instead of archiving them?	You can delete policies that are in draft. However, once they are published they can only be archived.
Can I issue my own contract outside of the Employment Hero platform but still utilise other functions of the employee onboarding process (like the checklist)?	Yes, you can onboard an employee without issuing a contract. You can upload the contract into the system when you like.
Once a policy has been archived, can I still see which employees have previously acknowledged the policy?	Yes, you can do so via Reports > Compliance > click the policies wheel > filter to include Archived.

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Do you have any tips on how I can adjust font styles when creating templates?

You can create and edit the template outside the system. After, you can upload the template to Employment Hero and apply the e-signature when sending it to the employee.

As an admin, can we reset passwords for our employees?

No, you cannot reset passwords for your employees.

Can we set custom fields to go to specific employees only?

No, custom fields are for all employees and cannot be set to be applied to specific employees only.

Can an employee leave their onboarding at any stage and return later without losing their information?

Yes, they can.

Can we make custom fields mandatory?

Yes, when creating the custom fields, you will be asked if you want it to be mandatory during onboarding.

If a staff does not have a superannuation fund, can they skip this until it is ready to complete?

This cannot be skipped. However, they can select 'company preferred' and change it at a later date.

Will the onboarding process look and read the same on a smartphone as compared to on desktop?

Yes, the screens should look pretty much the same or at least ask for the same information.

We have been told that the Super Choice form does not push through to Xero. If that's the case, what happens to the information the employee enters in the Super Details section?

The information is held within the HR system, you will need to add their details to Xero directly.

Can the admin change the medical conditions?

No, that is not possible.

How do we onboard an ex-employee?

You can re-activate them by searching them in your employee list.

How do employees change their photo?

They can do so on the profile page. Under the overview page they can click the pencil icon allowing them to change their photo.

How do I tell what type of access an employee has?

You can navigate to Settings > Custom Security Settings and then search for the employee on the page.

Do you have an introductory video for using Employment Hero so that we can share when onboarding new employees?

You can find relevant resources [here](#).

Will medical certificates submitted go into the HR documents section?

No, they will only remain in the leave management section.

Do employees have access to upload documents?

Yes they can, but only on the platinum subscription. There is a setting to allow employees to upload their own documents.

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Can I email or message an employee through Employment Hero after the onboarding stage?	No, that is not currently possible.
Can you add benefits for an employee after they are onboarded?	Yes, you can do so via Employee File > Employee Benefits.
Can an employee resubmit a tax declaration?	Yes, they can.
Where can I access company policies and procedures?	You can access it via the compliance tab under policies.
Is it possible to integrate with Microsoft Outlook so that scheduled 1:1 meetings sync with Outlook Calendar?	No, but it is something we are currently exploring.
Is there an option for employees to print a policy out?	Yes, they can do so via the print option in the top right corner.
Can I add a video content to the induction space?	Yes, the video will need to be hosted on an external platform like YouTube.
Does KeyPay have a rostering function?	Yes, it does. Find out more here .
How do I allow all employees to view the leave calendar for the organisation?	You can enable this via Settings > Customer Security Settings.
Why can't I see the Time feature although I have a platinum subscription?	Please check Settings > Menu > Customisation to ensure you have not disabled it.
How do I access previous webinars?	Please find recordings for past webinars here .
How do I get access to My Learning?	You will need to be integrated with the LMS platform via Settings > Add Ons.
How do I send out a notification to all employees after creating custom fields?	You can use the notify employee checkbox when you create custom fields.
You can utilise the notify employee checkbox when you create the custom field.	Yes, it is.
Can I remove the company feed feature?	No, it is part of the platform infrastructure.
Do new employees receive notifications to read/acknowledge all mandatory policies?	Yes, they will receive weekly notifications for policies that require their attention.
If I add new mandatory policies to the policies section, will this only be required for new employees?	Any policies added will be shared with all employees, which means everyone is required to acknowledge.

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Can I tag someone in an announcement?	Yes, you can type '@' and their name to tag them.
If I have logged into the Swap App, will I receive notifications on the App and via email?	If you have the Swap App, notifications will be defaulted to the phone rather than via email.
Does the employee email for the platform need to be a personal email and not a work email?	We recommend that you use the personal email so that employees can access their data if they leave the business. Please see this article which outlines where emails are directed.

Other helpful resources

Custom Fields	<ul style="list-style-type: none"> https://help.employmenthero.com/hc/en-au/articles/360001253796-Customising-onboarding-and-employee-file-fields-HR-Web-Platform https://help.employmenthero.com/hc/en-au/articles/360002094336-Building-a-custom-fields-report-HR-Web-Platform
Certifications	<ul style="list-style-type: none"> https://help.employmenthero.com/hc/en-au/articles/360001009016 https://help.employmenthero.com/hc/en-au/articles/360000954456-Managing-assigned-certifications-HR-Employee-File https://help.employmenthero.com/hc/en-au/articles/4410898357903-Assigning-Certifications-in-the-HR-platform-Video https://help.employmenthero.com/hc/en-au/articles/360002116275-Certification-reporting-HR-Web-Platform
Teams	<ul style="list-style-type: none"> https://help.employmenthero.com/hc/en-au/articles/360001018575-Set-up-up-up-your-organisations-teams-HR-Web-Platform https://help.employmenthero.com/hc/en-au/articles/5402690786575-Creating-Teams-in-the-HR-platform-Video
Policies	<ul style="list-style-type: none"> https://help.employmenthero.com/hc/en-au/articles/360001575036 https://help.employmenthero.com/hc/en-au/articles/360000973676-My-company-policies-HR-Web-Platform https://help.employmenthero.com/hc/en-au/articles/6531164413199-Updating-Policies-and-Templates-HR-FAQ https://help.employmenthero.com/hc/en-au/articles/360003663056-Issuing-new-HR-policies-Video
Induction	<ul style="list-style-type: none"> https://help.employmenthero.com/hc/en-au/articles/360000958395-Employee-induction-content-HR-Web-Platform https://help.employmenthero.com/hc/en-au/articles/360002148155-Policies-and-induction-content-reporting-HR-Web-Platform
Onboarding Checklists	<ul style="list-style-type: none"> https://help.employmenthero.com/hc/en-au/articles/360001003555-Set-up-your-organisations-onboarding-checklists-HR-Web-Platform https://help.employmenthero.com/hc/en-au/articles/4411310995727-Manually-trigger-an-onboarding-checklist-HR-Employee-File
Employee File Customisation/Custom Branding/Menu	<ul style="list-style-type: none"> https://help.employmenthero.com/hc/en-au/articles/360001134535-Employee-file-customisation-HR-Web-Platform https://help.employmenthero.com/hc/en-au/articles/360001426896 https://help.employmenthero.com/hc/en-au/articles/360001132955
Document Templates/Employment Contracts	<ul style="list-style-type: none"> Video Advanced Editor: https://employmenthero.com/hero-hub/webinars/advanced-editor/ Video Basic Editor: https://help.employmenthero.com/hc/en-au/articles/6540565640463
Onboarding	<ul style="list-style-type: none"> https://help.employmenthero.com/hc/en-au/articles/5050192151183-The-HR-onboarding-experience-Video https://help.employmenthero.com/hc/en-au/articles/360004049095-How-do-I-onboard-a-new-Employee-by-Hero-Academy-Training https://help.employmenthero.com/hc/en-au/articles/360000940075 https://help.employmenthero.com/hc/en-au/articles/360001060535