Fern New Hire Onboarding

Standard Operating Procedure (SOP)

Purpose

Fern's New Hire Onboarding process is used to:

- Collect new hire paperwork and identification safely

- Store these documents securely

- Securely transfer this data to others for entry into necessary systems (OASIS, ADP, E-Verification System)

This SOP explains how to use Fern's New Hire Packet and the Fern Onboarding site to complete and manage all new hire documents.

Overview of the Process

There are **five main steps**:

1. Collect the new hire's information

2. Validate (review) the new hire's information

3. Enter the new hire's information into OASIS

4. Reject or approve the new hire's documents

5. Communicate the new hire's information to Payroll and Fern Support

Step 1: Collect the New Hire's Information

1A. Pre-Show

1. **Download the Onboarding Report and QR Code from OASIS:**

   o In OASIS, open the specific **Show** record (Show Entity).

   o In the top options (Action Ribbon), click **"Onboarding Report."**

   o OASIS will generate a document with a **QR code that is unique to that show**.

2. Save a copy to your digital show file & print copies to bring to show site.

3. **Confirm the GC COS:**

   o Make sure the **correct GC COS** is assigned on the show record in OASIS.

   o This is important because the GC COS will receive the new hire notifications.

4. Obtain your call list in advance from the union/business partner so you can identify ahead of time which resources will need new hire packets.

1B. On Show Site

1. **Provide the New Hire Packet:**

   o When a new hire arrives onsite, give them **Fern's New Hire Packet**.

   o The QR code for the show can either:

      ▪ Be included in the packet, **or**

      ▪ Be displayed at the sign-in table (recommended)

2. **Check the Packet When It's Returned:**

   o When the new hire gives the packet back, **double-check that all required fields are filled out** on all forms.

3. **Collect I-9 Credentials:**

   o Review and record the new hire's documentation that establishes their identity and employment authorization on the **I-9 Form** for E-Verification. Be sure you sign the form as well to acknowledge doing this step.

4. **Submitting Documents Using the QR Code:**

   o Instruct the new hire to **scan the QR code** with their smartphone which directs them to Fern's Onboarding site

   o They will use **Fern's Onboarding site** to upload photos/files of their completed new hire packet and supporting credentials

      ▪ Note, take photos directly from the secure site's camera function as this allows document images to not be stored on the device

   o If the new hire **cannot scan or upload** documents themselves:

      ▪ You may scan the QR code using your own device and **upload the documents on their behalf**.

5. **Collect and Store the Paper Packet:**

   o After the documents are submitted online, **collect the paper New Hire Packet**.

   o The packet must be stored safely. Fern is required to keep all new hire documents:

      ▪ **W-4s:** 4 years after the date taxes were due or paid

      ▪ **I-9s:** 3 years after hire **or** 1 year after termination (whichever is later)

Best practices for safe storage:

   o While on show site:

      ▪ Store completed new hire packets in a **locking cage** that will be sent back to the GC Base City warehouse.

- o After the show:
    - ▪ When the cage returns to the warehouse, remove the packets and file them in a **locking file cabinet**, organized by year.
    - ▪ Keep them stored for **4 years**.
    - ▪ Re-stock the cage with **blank new hire packets** for the next show.

Important: New hires **cannot take the New Hire Packet home** to finish later. It must be completed and returned onsite.

1C. Uploading the New Hire Packet (Fern Onboarding Site)

After scanning the QR code, the new hire is taken to the **"Get Started"** page.

1. **Get Started Page – Required Fields:**
   The new hire must complete **all** the following fields:
    - o Social Security Number
    - o Legal First Name
    - o Legal Last Name
    - o Phone Number
    - o Email Address
    - o Show Number – *this is pre-filled and **cannot** be edited*

2. **Click "Upload Documents."**

3. **Upload Your Documents Page – Required Categories:**
   The new hire must upload photos/files of each completed page of the New Hire Packet into the correct categories:
    - o **New Hire Form**
    - o **New Hire Guidelines**
    - o **W-4**
    - o **Direct Deposit** – *Optional; only if they want direct deposit with Fern Expo*
    - o **I-9**

4. **Upload Supporting Documents – Direct Deposit:**
    - o **Direct Deposit Supporting** – *Optional but strongly encouraged* if the new hire filled out the Direct Deposit form.
        - ▪ This is for a formal document from the new hire's bank that confirms their direct deposit information (for example, a **voided check** or a **bank direct deposit letter/notice**).
        - ▪ **Note:** A formal bank document **will not be accepted** if Fern's Direct Deposit Form itself is not completed.

5. **Upload Supporting Documents – I-9 Lists A, B, and C:**
   (as **required** as part of the Department of Homeland Security's Form I-9 Employment Eligibility Verification)

   For the I-9, employees must present and upload either:

   - **One document from List A**, *or*

   - **One document from List B and one from List C**

1D. Determining Who Is Truly "New"

- Before new hires arrive, compare your **Union Call Sheet** with the **active resources in OASIS**.

- If you or the worker are unsure whether they have worked for Fern in the last 2 years:

   - Have them **complete the new hire process anyway**.

   - This ensures their information is current and helps make sure they are **paid on time**.

Step 2: Validate the New Hire's Information

Accessing Submitted Documents

1. When a new hire uploads their documents on the Fern Onboarding site, the GC COS assigned to the show in OASIS receives an email notification.

2. In the email, click the link to go directly to that **show's dashboard** on the Fern Onboarding site.

   - You can also go to: **https://onboarding.fernexpo.com/approver/#/login** and search for the show.

3. Click **"Continue"** to see all new hires **pending approval**.

4. In the Approval List, under **"Verify Documents"**, select **"Click Here"** next to the new hire you want to review.

5. In the **Filed Documents** and **Supporting Documents** sections:

   - Click each category to open and review the uploaded documents

   - If a document is uploaded to a category, the category will:

      - Be **outlined in green**, and

      - Show a **checkmark**.

6. Carefully verify that all pages are complete and necessary documentation is provided

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Step 3: Enter the New Hire's Information into OASIS

1. Before you **approve** the new hire on the Fern Onboarding site:

   o Use the uploaded documents (photos/files) to **enter the new hire into OASIS**.

2. If the new hire **worked for Fern before**:

   o **Reactivate** their existing record in OASIS.

   o Update any information that has changed (address, marital status, dependents, phone, email, union classification, etc.).

3. **Important:**

   o Once you approve the new hire in the Fern Onboarding site, they are removed from your approval list and you cannot access their documents again through the site.

   o This is for security of their personal information.

Step 4: Rejecting or Approving the New Hire's Documents

4A. Rejecting New Hire Documents

Reject the new hire's documents if any of the following are true:

- Required fields on the **W-4** are incomplete
- Required fields on the **I-9** are incomplete
- Required fields on the **Direct Deposit form** (if completed) are incomplete
- Supporting documents are **expired**
- The **wrong** supporting documents were provided
- **No** supporting documents were provided

How to Reject:

1. Click the **"Reject"** button at the bottom of the screen.

2. A pop-up box will appear, asking you to explain why the documents are being rejected.

   o Be as **clear and specific as possible**.

   o The new hire will see this explanation.

3. Click **"Submit."**

4. A **template email** will be created automatically for the new hire, including your reason for rejection.

5. Review and **send the email** to the new hire.

   o You may edit the email body if needed.

6. The new hire will **remain on your approval list** so you can continue to follow up until correct documents are received.

7. New hires can:

   o Correct their paperwork **onsite**, or

- o Communicate with you via **email/phone** if they are no longer onsite.

8. **Important:** Corrected documents must be **re-uploaded** to the **Fern Onboarding site**. Paper corrections alone are not enough.

4B. Approving New Hire Documents

Approve the new hire when:

- All documents are complete and accurate

- Information has been entered into OASIS

- Proper supporting documents have been submitted

How to Approve:

1. After reviewing and confirming everything is correct, click the **"Approve"** button at the bottom of the screen in the Fern Onboarding site.

2. When prompted, enter the new hire's:

   - o **Union affiliation**, and

   - o **Union classification**

3. The designated **GC COS** will receive email reminders **every two hours** if there are new hires pending approval for their assigned show.

Step 5: Communicate the New Hire's Information

- When you approve the new hire on the Fern Onboarding site, all necessary documentation is **automatically sent** to:

  - o **Payroll**, and

  - o **Fern Support Team**

- No extra communication steps are required for documents.

- Remember to **store the paper New Hire Packet securely** according to the storage guidelines in Step 1B.

General Support & Contacts

If the **Fern Onboarding site** or **applications** are not working as described, or if an error was made that needs correction:

- Contact **OASIS Support**: **oasissupport@nthdegree.com**

Other questions or need additional assistance?

- **Ashlyn Garrett,** Operations Support Manager
  407.375.6143 | amckerahan@nthdegree.com