

AVIONTÉ  
CONNECT

# Mastering Mobile Onboarding

EMPOWERING RECRUITER SUCCESS WITH  
AVIONTÉ 24/7 ONBOARDING



# About Me:

- **Katie Schulz**
- Business Analyst -- Product
- Been with Avionté since 2016
- Legally changed middle name to 'Avocado'





# About Me:

- **Mattie Silverman**
- Senior Project Manager
- Been with Avionté since 2020
- Coaches youth wrestling



# The Agenda

1

What is Avionté 24/7 Mobile Onboarding?

2

Configuring Tasks & Workflows

3

Configuring Automation

4

Reporting & Widgets

5

Client Perspective

6

What's Ahead



# What is Avionté 24/7 Onboarding?

---



# Avionté 24/7 Mobile Talent Enablement



# 24/7 Onboarding vs Legacy Onboarding



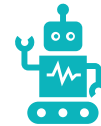
## INTEGRATIONS

Currently for US clients: Symmetry forms and Equifax I-9



## NOTIFICATIONS

Beyond email:  
In-app & text notifications



## AUTOMATION

Workflows send based on Status & Stage changes



## MOBILE APP

Talent go to mobile onboarding with the click of a link

Avionté 24/7 Onboarding includes engagement with project management team





# Configuring Tasks & Workflows

---



## TASKS

# Questionnaires

In addition to Adobe, Talent Questionnaires are a great option!

- Mapping options
- Ability to add signature or initials
  - Only one signer

### Edit Question Details

Question: Enter question 1 here.

Question Type:

Required:

Linked Field:

Question Order:

- None
- First Name
- Last Name
- Address 1
- Address 2
- City
- State
- Zip/Postal Code
- Email Address
- Work Phone
- Home Phone
- Mobile Phone
- Mobile Phone 2
- Email Address 2
- Salary Details
- Hourly Details
- C2C Corp Name
- C2C Corp Address 1
- C2C Corp Address 2
- C2C Corp City

### Edit Question Details

Question: Enter question 1 here.

Question Type:

Required:

Linked Field:

Question Order:

- None
- Available Date
- Hire Date
- Rehire Date
- Termination Date
- Birth Date

### Edit Question Details

Question: Enter question 7 here.

Question Type:

Required:

Linked Field:

Question Order:

- None
- Salary Minimum
- Salary Maximum
- Hourly Minimum
- Hourly Maximum

TASKS

# Questionnaires

In addition to Adobe, Talent Questionnaires are a great option!

- Mapping options
- Ability to add signature or initials
  - Only one signer

Applicant Acknowledgement

Signature

None

Checkbox

Signature

Signature and Checkbox

Thank you for testing!

Rose Tyler

Sent Date: 7/5/2024 2:01:41 PM

Talent Signed Date: 7/5/2024 2:02:55 PM

## Acknowledgement

I acknowledge I have reviewed the Employee Handbook. I will comply with all of the policies and procedures as outlined in the handbook.

\*Required

Draw Signature Type Signature

Signature area

Clear Signature

Cancel

Submit



TASKS

# Questionnaires

- Now viewable by talent after signing
- Audit abilities: Time and Date listed beneath the signature line once completed for talent and end users
- HCM User can view in Talent > Documents (in addition to Talent > Results)

## Customize your Talent Questionnaires [Utilities > Talent Questionnaire Editor](#)

Questionnaire Name:

Worktron Employee Guidelines



Talent Viewable:

Show

[Resume](#) [Education](#) [Work History](#) [Documents](#) [Comments](#) [References](#) [Tax](#) [Tags](#) [EEO](#) [Activities](#) [Timesheets](#) [Tasks](#) [Onboarding](#) [Results](#) [Placements](#) [Paychecks](#) [Restrictions](#) [Certificates](#) [Covid Tracking](#) [Criminal History](#)

Expiration Date:  Document Privacy:   Document Type:  Employer:

Talent Documents

No documents found.

Tax Withholding Forms

No Symmetry Forms have been completed.

Talent Questionnaires from Web Applies

No Talent Questionnaires have been completed from web applications

Sent Talent Questionnaires

Questionnaire	Version	Sent	Replied	Score	
Basic Math Skills Assessment	9	6/27/24	6/27/24	97%	
Basic Math Skills Assessment	9	6/27/24	6/27/24	73%	
Basic Math Skills Assessment	9	6/27/24	6/27/24	73%	
Basic Math Skills Assessment	9	6/27/24	6/27/24	73%	

TASKS

# Questionnaires

- Now viewable by talent after signing
- Audit abilities: Time and Date listed beneath the signature line once completed for talent and end users
- HCM User can view in Talent > Documents (in addition to Talent > Results)

## Customize your Talent Questionnaires

[Utilities](#) > Talent Questionnaire Editor

Questionnaire Name:

Worktron Employee Guidelines



Talent Viewable:

Show

### Tax Withholding Forms

[FEDERAL-W-4-Employee's Withholding Certificate](#) FEDERAL-W-4-Employee's Withholding Certificate

Sent by: Service User on Friday, May 24, 2024 at 2:30 PM

Completed by: on Friday, May 24, 2024 at 2:35 PM

Employer: Staffing

[FEDERAL-W-4-Employee's Withholding Certificate](#) FEDERAL-W-4-Employee's Withholding Certificate

Sent by: Service User on Tuesday, May 14, 2024 at 3:27 PM

Completed by: on Tuesday, May 14, 2024 at 3:35 PM

Employer: Staffing

[FEDERAL-W-4-Employee's Withholding Certificate](#) FEDERAL-W-4-Employee's Withholding Certificate

Sent by: Service User on Wednesday, March 20, 2024 at 9:55 AM

Completed by: on Wednesday, March 20, 2024 at 9:55 AM

Employer: Staffing

### Talent Questionnaires



Handbook Acknowledgment

Completed on: Wednesday, February 14, 2024 at 1:59 PM

## TASKS

# Due Date

Can be set up under the workflow for automations or on the talent Questionnaires

- Can be added on the task level
- Can be added in the workflows
- Trackable in reports as well as the Onboarding Task widget

Task	Due Date
Education	4 days after assignment
Symmetry	2 days after assignment
FEDERAL - W-4 - Employee's Withholding Certificate	
Talent Questionnaire	1 days after assignment
Handbook Signoff	

### Direct Deposit Workflow Configuration

*Set up your due date configuration and a short description of the task below*

**Task Due**  
 Days after tasks assignment

**Task Instructions**  
Please provide ONE Direct Deposit account for your paycheck. Contact your recruiter with any questions

[Save](#)

## Onboarding Tasks

80 Sent Tasks

63 Action Required

170 Completed Tasks

8 Overdue Tasks



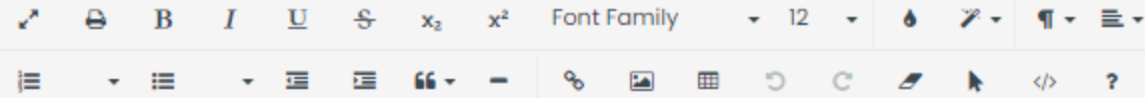
## TASKS

# Instructions

You can now add in instructions in a few different places

- Talent Questionnaire
- Symmetry Workflow
- Onboarding Tasks

### Questionnaire Introduction:



Templates Save Defaults View Defaults Applicant Merge Fields

I acknowledge that I have received a paper or electronic copy, and will read, the company's Associate Employee Handbook. I understand that I am an employee-at-will of the company, which means that I can terminate my employment at any time and for any reason, and that the company can terminate my employment at any time and for any reason. I agree that nothing in the Associate Employee Handbook, constitutes an employment contract between myself and the company. I understand that the Associate Employee Handbook, supersedes and replaces all previous Associate Employee Handbooks and manuals, and that all previous Associate Employee Handbooks and manuals no longer have any force or effect. The need may arise to change the guidelines described in the handbook, except for the at-will nature of employment. The company therefore reserves the right to interpret them or to change them without prior notice. I have read and understand this acknowledgement form. Any questions which I have had concerning this form or its contents have been answered by the company.

## Symmetry Workflow Configuration

*Set up your due date configuration and a short description of the task below*

### Task Due

Days after tasks assignment

### Task Instructions

Please answer the questions presented to complete the necessary tax forms required for payroll.

Save



## Onboarding Tasks



Certifications	<input checked="" type="checkbox"/>
Competencies	<input checked="" type="checkbox"/>
Direct Deposit	<input checked="" type="checkbox"/>
Education	<input checked="" type="checkbox"/>
Equal Employment Opportunity	<input checked="" type="checkbox"/>
Personal Info	<input type="checkbox"/>
Resume	<input checked="" type="checkbox"/>
Talent Questionnaire	<input checked="" type="checkbox"/>

## Direct Deposit Workflow Configuration

*Set up your due date configuration and a short description of the task below*

### Task Due

Days after tasks assignment

### Task Instructions

Please provide ONE Direct Deposit account for your paycheck. Contact your recruiter with any questions

Save





## INTEGRATIONS

# Adobe

- Reasons to still use Adobe:
  - Key mappings still exclusively in Adobe
  - Counter-signing
- Not mobile-friendly, but still able to be completed via app
- Previously completed & historical Adobe documents will not go away

11:27

24/7 Onboarding

Powered by Adobe Acrobat Sign

2 required field(s) remaining

Start

**BUBBLES STAFFING**

**W-2 Form Electronic Delivery Consent**

Do you consent to receive your W-2 electronically at the end of the year?

\* Select...

Full Name: \* Katie Pixelgirl

Signature: \* Sign here

Date: Jun 19, 2024

BUBBLES STAFFING is required by the Internal Revenue Service (IRS) to provide each employee with a W-2 Form that states the employee's compensation and tax withholding amounts for the calendar year on or before January 31st of the following year. The IRS permits the use of electronic W-2 statements to meet this requirement. Starting this year, instead of paper copies, employees may choose to receive their W-2 statement electronically.

The benefits of receiving an electronic W-2 statement are:

- Earlier access
- Once received electronically, significantly less possibility that the W-2 may be lost or stolen
- Access is possible electronically if the employee is away from his/her usual home or work location
- Compensation and tax withholding information may easily be downloaded into many tax preparation software programs

Employers must comply with specific IRS regulations to use electronic W-2's and employees must provide their consent to receive an electronic W-2 instead of a paper copy. This notice contains the required IRS disclosure information and instructions for you to consent to receiving your W-2 electronically instead of a paper copy. If you have any questions regarding this notice or your W-2 Statement, contact the HR Department.

Please read this entire notice and, if you wish to receive all future W-2 statements from this company electronically, provide your consent as instructed below. If you do not provide this consent by January 3rd, you will continue to receive a paper copy of your W-2 statement.

As required by the IRS, this consent must be made electronically in a manner that reasonably demonstrates that the employee can access the W-2 in the electronic format in which it will be provided. As an alternative, the consent may be made via e-mail or via a paper authorization if it is confirmed electronically in a manner that demonstrates the employee's ability to access the electronic statement.



## INTEGRATIONS

# Adobe

What is the Adobe experience like?

- Key mappings still exclusively in Adobe
  - W2 electronic consent
- Not mobile-friendly, but still able to be completed via app
- Previously completed & historical Adobe documents will not go away

11:27

24/7 Onboarding

Powered by Adobe Acrobat Sign

2 required field(s) remaining

**BUBBLES STAFFING**

**W-2 Form Electronic Delivery Consent**

Do you consent to receive your W-2 electronically at the end of the year?

\* Select...

Full Name: \* Katin Divoir

✓ Select...

Yes

No

- Earlier access
- Once received electronically, significantly less possibility that the W-2 may be lost or stolen
- Access is possible electronically if the employee is away from his/her usual home or work location
- Compensation and tax withholding information may easily be downloaded into many tax preparation software programs

Employers must comply with specific IRS regulations to use electronic W-2's and employees must provide their consent to receive an electronic W-2 instead of a paper copy. This notice contains the required IRS disclosure information and instructions for you to consent to receiving your W-2 electronically instead of a paper copy. If you have any questions regarding this notice or your W-2 Statement, contact the HR Department.

Please read this entire notice and, if you wish to receive all future W-2 statements from this company electronically, provide your consent as instructed below. If you do not provide this consent by January 3rd, you will continue to receive a paper copy of your W-2 statement.

As required by the IRS, this consent must be made electronically in a manner that reasonably demonstrates that the employee can access the W-2 in the electronic format in which it will be provided. As an alternative, the consent may be made via e-mail or via a paper authorization if it is confirmed electronically in a manner that demonstrates the employee's ability to access the electronic statement.

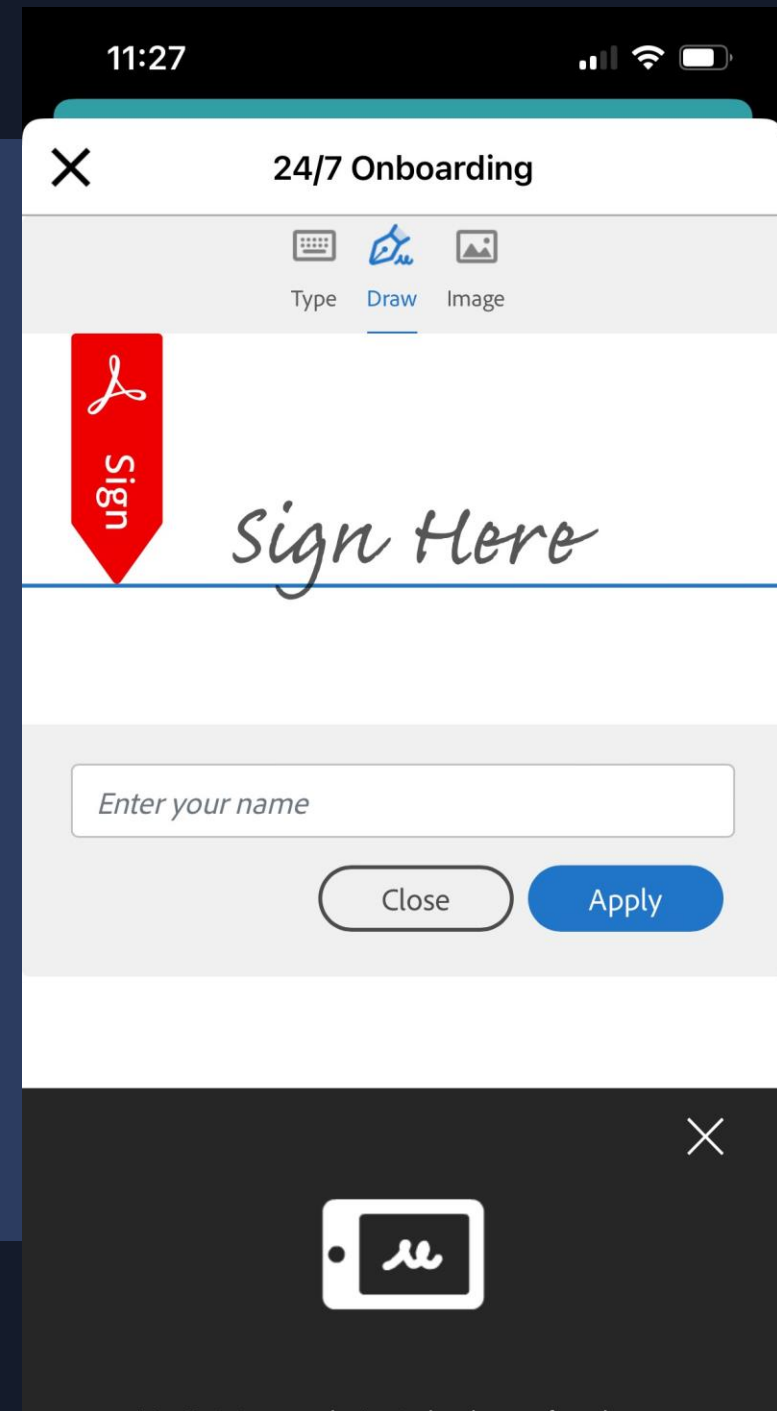


## INTEGRATIONS

# Adobe

You can still use Adobe!

- Key mappings still exclusively in Adobe
- Not mobile-friendly view of document, but still able to be completed via app with mobile-friendly signature
- Previously completed & historical Adobe documents will not go away



## INTEGRATIONS

# Symmetry

- API integration included with Onboarding; easier than self-managing Adobe templates
- Currently supports US (English) forms

The screenshot displays a settings page with several expandable sections. The 'Symmetry Tasks' section is expanded, showing a list of tasks with toggle switches. The 'Onboarding Tasks', 'E-Signature Templates', 'Integration Tasks', and 'Assessment Tasks' sections are collapsed. The 'Symmetry Tasks' section has a toggle switch set to 'On'. Below it, the following tasks are listed, each with a toggle switch set to 'On':

Task Name	Status
Symmetry Guided	On
AL - A4 - Employee's Withholding Exemption Tax Certificate	On
AR - AR4EC - Employee's Withholding Exemption Certificate	On
AZ - A-4 - Employee's Arizona Withholding Election	On
CA - DE 4 - Employee's Withholding Allowance Certificate	On
CO - DR 0004 - Colorado Employee Withholding Certificate	On



## INTEGRATIONS

# Symmetry

- API integration included with Onboarding; easier than self-managing Adobe templates
- Currently supports US (English) forms
- Withholding information maps to Back Office
- Mobile-friendly! Preferred way to collect state and federal withholding

15:39

24/7 Onboarding

< Symmetry Tax (FEDERAL - W-4)

Please answer the questions presented to complete the necessary tax forms required for payroll.

**Dependents survey - Step 3**  
Would you like to claim any dependents?  
**\* Required**

Yes

No

To qualify for the child tax credit, the child must meet all of the following conditions.

- be under age 17 as of December 31
- be your dependent who lives with you for more than half the year
- have a valid social security number

You also can include other tax credits, such as education tax credits and the foreign tax credit.

Cancel Back Next



## INTEGRATIONS

# Symmetry

- API integration included with Onboarding; easier than self-managing Adobe templates
- Currently supports US (English) forms
- Withholding information maps to Back Office
- Mobile-friendly! Preferred way to collect state and federal withholding
- "Guided" option for Pipeline/Nomination: looks at worksite & residential address to determine correct forms for Talent

16:19

24/7 Onboarding

Let's determine the right Federal tax forms

Survey

Select the correct choice: Foreign Earned Income Exclusion, Nonresident Alien, Standard Federal Form W4 \* Required

Foreign Earned Income Exclusion - I expect to qualify for the foreign earned income exclusion under either the bona fide residence or physical presence test for calendar year or other tax year

Nonresident Alien who is EXEMPT - I am exempt from withholding on compensation for independent (or eligible dependent) personal services of a Nonresident Alien Individual, see instructions for Form 8233

Standard Federal Withholding (English) - I am not qualified for a Foreign Earned Income Exclusion. I want to complete the standard Federal W4

Retención Federal Estándar (Español) - No estoy calificado para una exclusión de ingresos del trabajo en el extranjero. Quiero completar el estándar Federal W4

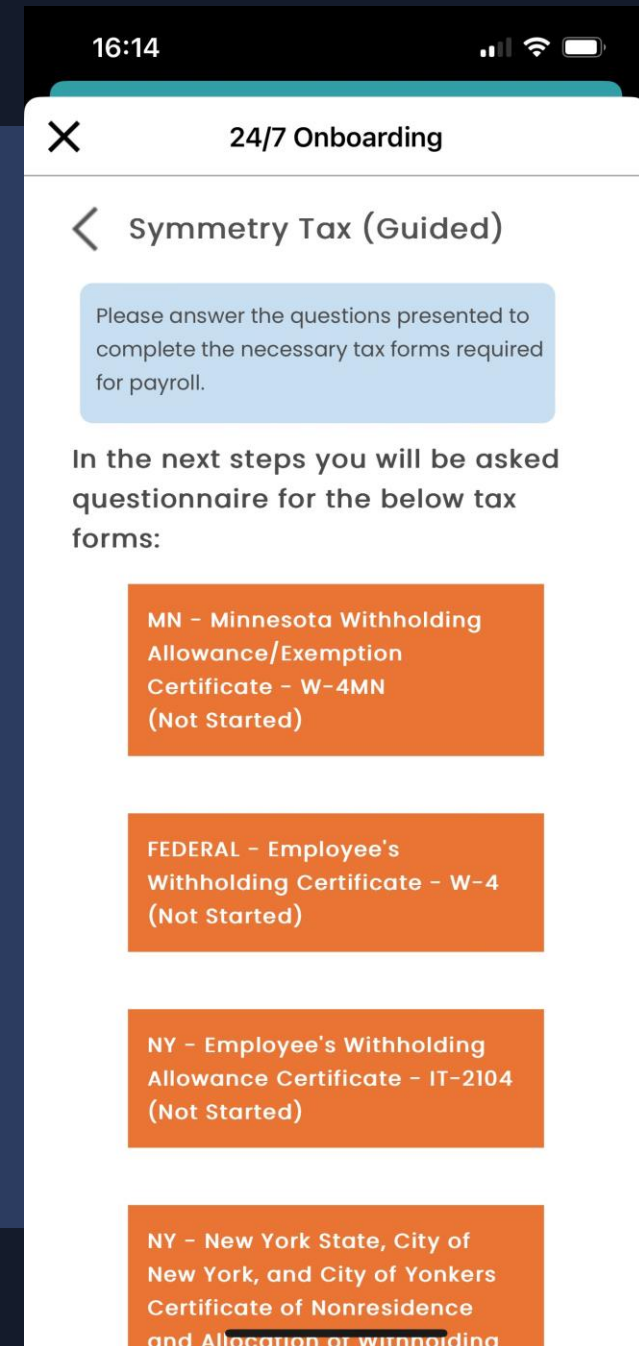
Nonresident Alien: If you are an alien individual (that is, an individual who is not a U.S. citizen), specific rules apply to determine if you are a



## INTEGRATIONS

# Symmetry

- API integration included with Onboarding; easier than self-managing Adobe templates
- Currently supports US (English) forms
- Withholding information maps to Back Office
- Mobile-friendly! Preferred way to collect state and federal withholding
- "Guided" option for Pipeline/Nomination: looks at worksite & residential address to determine correct forms for Talent



# Certification Task Enhancements

Current Certifications task caused too much drop-off during Onboarding, so we made the following changes for Avionté 24/7 Onboarding clients:

- Ability to request specific Certification(s) via Talent task
- Ability to limit what category of Certificates a Talent can view in the task
- Improved UI; better Talent experience
- Ability to send multiple Certification tasks within one workflow; append task name
- Require specific fields for the Certification task





ADMIN VIEW

Task	Due Date
<input type="checkbox"/> Certifications	<input type="text" value="5"/> days after assignment
<input type="text" value="Healthcare"/>	
<input type="text" value="No Certificate Selected"/>	
<input type="text" value="Healthcare"/> Task Name will display as Certifications:Healthcare	

RECRUITER VIEW

### Onboarding Tasks

<input type="checkbox"/> Status	Onboarding Task	Packet Name	Sender	Sent	Completed	Employer
<input checked="" type="checkbox"/> Sent	Certifications: Healthcare		Katie Schulz	07/22/24		Staffing
<input type="checkbox"/>	Healthcare Certificate(s) requested					



Please fill in your information for each required certification as requested.

### Add a New Certificate

Healthcare

 Action Required

Cancel

Submit Certifications

Please attach your i9 supporting documents and relevant credentials to this form.

Certificate Category

Healthcare

Certificate

Select Certificate

Issue Date

mm/dd/yyyy

Expiration Date

mm/dd/yyyy

Issuing Authority

None

Certificate Number/ID

ex: 1234560

Notes

Enter any additional information here



# Recruiter Setup View

## Certifications Workflow Configuration

Set up your due date configuration and a short description of the task below

### Task Due

Days after tasks assignment

### Task Instructions

If you have no Certifications, please submit as blank. Thanks!

### Certifications Details

Select required and optional fields for this Certification Task

- Certificate Category  
Required
- Certificate  
Required
- Issue Date  
Required
- Expiration Date  
Optional
- Issuing Authority  
Required
- Certificate Number/ID  
Required
- Notes  
Required
- Document Attachment(s)  
Required
- Document Expiration Date  
Optional

Save

# Talent View

## Certificate

Certificate name is required.

### Issue Date

Issue date is required.

### Expiration Date

### Issuing Authority

### Certificate Number/ID

Certificate number is required.

### Notes

Notes is required.

### Upload Current Document(s)

Please upload supporting documentation or images for this Certification. The expiration date associated with the documents will match the Certification's Expiration Date.

Upload Document is required.



# Onboarding Workflows

## Workflows versus Legacy Packets

- Task order Requirements
- Personal information Verification
- Set Due Dates
- Onboarding Reminder Configuration (with Avionté PIXEL only)

Connect Onboarding

Workflow Description

Effective Date

Workflow Office Access

Nothing selected

Stage 1: Verify Personal Information Stage

It is recommended that this stage never be disabled, as contact and other personal information verified in this stage is used to speed up the onboarding process by auto-filling information in included forms.

Don't require this stage.

Enter Stage Name

• Required

Stage Settings

Tasks must be completed in order

Send task reminders

Task	Due Date	Task Instructions
<p><a href="#">Add Task</a></p> <p>A task needs to be added in order to save.</p>		



# Onboarding Workflows











## Workflows versus Legacy Packets

- Task order Requirements
- Personal information Verification
- Set Due Dates
- Onboarding Reminder Configuration  
(with Avionté PIXEL only)

### Stage 1: Verify Personal Information Stage

It is recommended that this stage never be disabled, as contact and other personal information verified in this stage is used to speed up the onboarding process by auto-filling information in included forms.

Don't require this stage.

Task	Due Date	Task Instructions	
 Direct Deposit ▾	<input type="text" value="1"/> days after assignment	Please provide ONE Direct Deposit account for your paycheck. Contact your recruiter with any questions	
 Resume ▾	<input type="text" value="2"/> days after assignment		
 Work History ▾	<input type="text" value="2"/> days after assignment		
 Equifax Workforce Solutions 1-9 ▾	<input type="text" value="2"/> days after assignment		
 Symmetry ▾	<input type="text" value="2"/> days after assignment	Please answer the questions presented to complete the necessary tax forms required for payroll.	
<input type="text" value="Symmetry Guided"/> ▾			

[Add Task](#)

## Talent Engagement

Configure for [?](#)

Me ▾

### Apply and Interview

Application Received

[Edit](#)

*"We received your application for {{Job/Position Name}} - {{Job Id}}. One of our recruiters will review your resume as soon as they are available. If you would like to speed up the screening process, CLICK HERE {{Bot Interview Link}} to take a brief screening interview with our bot, PIXEL."*

### Onboarding / HR Tasks

Onboarding Tasks Assigned

[Edit](#)

*"You have new tasks ready to complete. Please go to {{Tasks Portal}} {{Tasks Portal Link}} to see your open items and complete them. Thank you!"*

Onboarding Tasks Reminder

[Edit](#)

*"You have new tasks ready to complete. Please go to {{Tasks Portal}} {{Tasks Portal Link}} to see your open items and complete them. Thank you!"*



# Configuring Automation

---



# What's New

## Conditions for Rules

- Talent Status
  - Talent Address
  - Talent Home Office

### Basic Automation Configuration

*Different events can be monitored and automated. Start by choosing the automation category, then the event.*

#### Automation Name

#### Automation Type

#### Event

### Trigger Conditions

*Actions will only trigger if the below conditions are true for the selected trigger*

#### Condition: 1



Talent Address

Talent Home Office ✓



# What's New

## Conditions for Rules

- Talent Status
  - Talent Address
  - Talent Home Office
- Pipeline/Nomination Stage
  - Talent Address
  - Talent Home Office
  - Company/  
Company Office

## Basic Automation Configuration

*Different events can be monitored and automated. Start by choosing the automation category, then the event.*

### Automation Name

### Automation Type

### Event

## Trigger Conditions

*Actions will only trigger if the below conditions are true for the selected trigger*

### Condition: 1

[+ Add Condition](#)

# What's New

Completion actions enhanced:

- Pipeline into Nomination
- Rule Chaining

## Actions

*Actions will only trigger if the conditions above are true for the selected trigger*

Send Workflow

General Onboarding

## Completion Action

When Workflow is Completed

Change Nomination Stage

TO

CS Onboarding Complete



# Widgets & Reporting

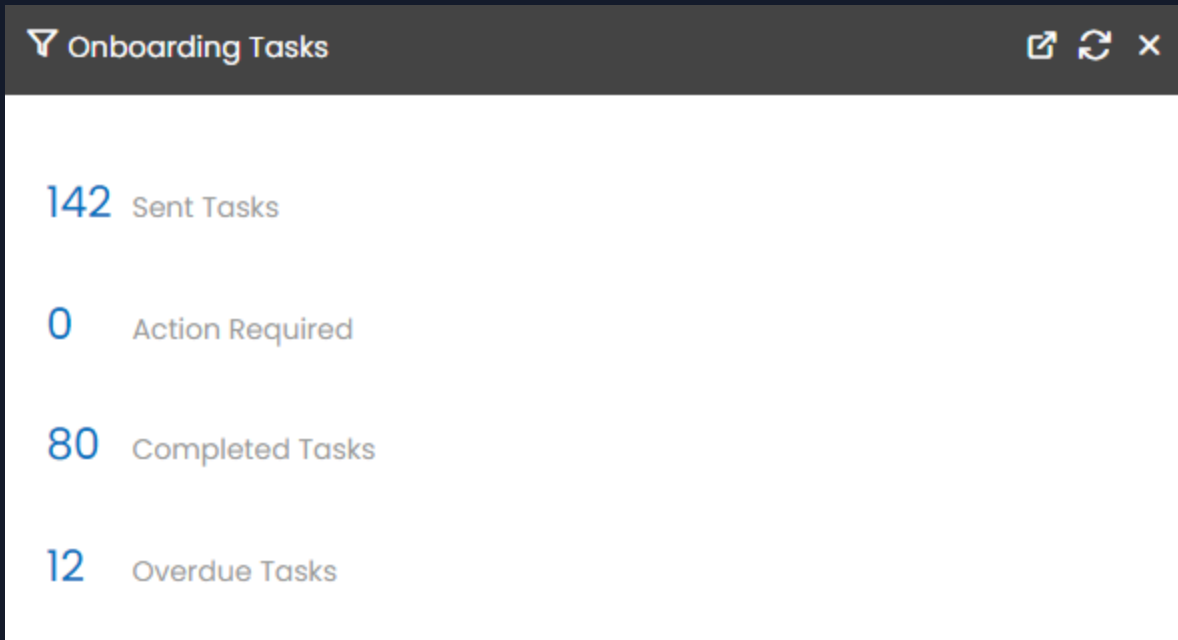
---



# MyDashboard Widgets

There are three widgets that work with Avionté 24/7 Onboarding

- Onboarding Tasks Widget
  - Extra tracking items such as overdue tasks and a link to the Equifax i9 dashboard
    - You can update the FEIN the i9 was placed under if it was done in error



The screenshot shows the configuration panel for the 'Onboarding Tasks' widget. It includes several filter sections:

- Branch:** A dropdown menu with 'All' selected.
- Users:** A dropdown menu with 'All' selected.
- Date Range:** A dropdown menu with 'Today' selected.
- Types:** A radio button selection with 'Tasks' selected (highlighted with a red box), and 'Packets' and 'Workflows' as unselected options.
- Types:** A dropdown menu with 'All' selected.
- Tasks:** A dropdown menu with 'All' selected.
- Include Tasks Sent via Automation
- Apply** button



# WIDGETS

Where you can take action on your TNCs!

The screenshot displays the AVIONTE dashboard interface. At the top, there is a search bar and user profile information for 'Hi, Katie'. The main content area is titled 'My Dashboards' and includes a sidebar with navigation icons. The dashboard is divided into several sections:

- Task overview**: A sub-section for 'Form I-9'.
- Past Due**: A widget with a red header showing a total of 142 tasks. The list includes:
  - I-9 Sent: 80
  - E-Verify Unconfirmed Data S2: 1
  - E-Verify Scan and Upload: 1
  - E-Verify Unconfirmed Data S1 Sent: 1
  - E-Verify FAN: 3
  - E-Verify Case Closure: 1
- Due Today**: A widget with an orange header showing a total of 1 task: Pending SSN.
- Due Soon**: A widget with a blue header showing a total of 1 task: Pending I-9: In-office.
- E-Verify**: A widget with a dark blue header showing a total of 19 tasks:
  - E-Verify Unconfirmed Data S2: 1
  - E-Verify Scan and Upload: 1
  - E-Verify Unconfirmed Data S1 Sent: 1
  - E-Verify FAN: 3
  - E-Verify Case Closure: 1
- Quick Actions**: A panel with two buttons: 'Reports' and 'View Tasks'.
- Feedback**: A panel with an image of people and a 'Send Feedback >' button.

# MyDashboard Widgets

There are three widgets that work with Avionté 24/7

## Onboarding

- E-Verify Case Management Widget
  - You can review pending items with the i9 and there are filters if you want to review for specific offices, users, or date ranges

Office:

Users:

Date Range:

- 0 Draft
- 0 Unconfirmed Data
- 2 Photo Match
- 0 Scan And Upload
- 0 Manual Review
- 1 Pending Referral
- 1 Referred
- 0 Queued



# MyDashboard Widgets

There are three widgets that work with Avionté 24/7

## Onboarding

- Expiring Certifications Widget
  - You can review certifications that are set to expire.

**Branches:**

All ▾

**Date Range:**

Today & Past Due ▾

**Active Contractors:**

Apply

Name	Certificate	Expire Date
Charles Barrett	LSSP	Mar 31, 2024
Peter Holm	Forklift	Jul 12, 2023
Anthony NaSal	Protective Agent Services	Aug 14, 2023
Nancy Nightengale	Registered Nurse (RN)	Sep 29, 2023
Test_ Morris	Forklift	Dec 31, 2023
Deonardo LiCaprio	Nurse Practitioner (NP)	Feb 23, 2024
Tiffany Pederson	CPR	Nov 8, 2023
Tiffany Pederson	Registered Nurse (RN)	Oct 18, 2023
Nicolle Kubitschek	Forklift	Feb 23, 2024
Stephanie Juarez	Certified Nursing Assistant (CNA)	Feb 1, 2023



ANALYZE

# Reports

There are two main reports

- Avionté 24/7 Onboarding Workflow Detail
- Symmetry Audit Report

The screenshot shows a 'Reports' section with a search bar containing 'Symmetry'. Below the search bar is a horizontal menu with several categories: Operational, Recruiting, Sales, Invoicing and Accounts Receivable, Time, Payroll, Pixel, and 24/7. The '24/7' category is highlighted in pink. Below the menu, there is a report card for 'Symmetry Audit' with an 'Operational' status tag. The description reads: 'This report provides the information received from Symmetry for the specific completed document.' The bottom right corner of the screenshot shows 'Last Accessed: Jul 8, 2024 10:18:24 PM'.

The screenshot shows a 'Reports' section with a search bar containing '24/7'. Below the search bar is a horizontal menu with several categories: Operational, Recruiting, Sales, Invoicing and Accounts Receivable, Time, Payroll, Pixel, and 24/7. The '24/7' category is highlighted in pink. Below the menu, there is a report card for '24/7 Onboarding Workflow' with a '24/7' status tag. The description reads: 'This report provides the information regarding onboarding workflow.' The bottom right corner of the screenshot shows 'Last Accessed: Jul 8, 2024 7:31:21 PM'.





# Reports

- Avionté 24/7 Onboarding Workflow Detail
  - Goes into detail as to what is sent, by who, to whom, sent date, completion date, number of tasks complete versus not, and stage information

Workflow Name	Sent By	Workflow Status	Talent	Talent First	Talent Last	Workflow Sent Date	Workflow Complete	Resume	# of Total Tasks Co	Tasks Not Complete	Stage 1	Stage 1 Completed
CS Onboarding	Clare Sodelling	Assigned/Sent	<a href="#">Test Soderling</a>	Test	Soderling	2024-06-05		Yes		Direct Deposit, Educ...	Verify Personal Infor...	
CS Pipeline	Service User	Completed	<a href="#">Test Soderling</a>	Test	Soderling	2024-05-14	2024-05-14	Yes	1		Verify Personal Infor...	2024-05-14
ClareH Onboarding ...	Service User	Completed	<a href="#">Jimmy Jack</a>	Jimmy	Jack	2024-05-09	2024-05-13	Yes	2			
ClareH Onboarding ...	Service User	Completed	<a href="#">Jimmy Jack</a>	Jimmy	Jack	2024-05-13	2024-05-15	Yes	2			
ClareH Onboarding ...	Service User	Completed	<a href="#">Jimmy Jack</a>	Jimmy	Jack	2024-05-16	2024-05-22	Yes	3			
John Stanton Test	jordan cox	Assigned/Sent	<a href="#">test_ zz247test</a>	test_	zz247test	2024-05-06		Yes		Certifications, Perso...	Verify Personal Infor...	
Jamie's Workflow	Service User	Assigned/Sent	<a href="#">Jamie Flores</a>	Jamie	Flores	2024-06-28		Yes		Equifax Workforce S...	Verify Personal Infor...	
Example Workflow	Service User	Completed	<a href="#">Samwise Rayman</a>	Samwise	Rayman	2024-05-24	2024-05-24	Yes	2		Hiring Documents	2024-05-24
Example Workflow	Service User	Completed	<a href="#">Samwise Rayman</a>	Samwise	Rayman	2024-05-24	2024-06-10	Yes	2		Hiring Documents	2024-06-10
DW Automation On...	Service User	Assigned/Sent	<a href="#">Dave Webb</a>	Dave	Webb	2024-06-06	2024-06-06	Yes	1	Direct Deposit, Educ...	Verify Personal Infor...	2024-06-06
DW Automation On...	Service User	Completed	<a href="#">Dave Webb</a>	Dave	Webb	2024-05-10	2024-05-10	Yes	1		Verify Personal Infor...	2024-05-10
Jamie's Workflow	Service User	Assigned/Sent	<a href="#">Test Flores</a>	Test	Flores	2024-06-28		Yes		Equifax Workforce S...	Verify Personal Infor...	
jordan test	jordan cox	Assigned/Sent	<a href="#">test_ zzonboardingtes</a>	test_	zzonboardingtest	2024-05-06		Yes	1	Certifications, Direct...		
CS Onboarding	Service User	Assigned/Sent	<a href="#">Ridley Harrison</a>	Ridley	Harrison	2024-05-16		Yes		Direct Deposit, Educ...	Verify Personal Infor...	
Example Workflow	Service User	Assigned/Sent	<a href="#">Alexander Libera</a>	Alexander	Libera	2024-06-25		Yes		Direct Deposit, Sym...	Hiring Documents	



ANALYZE

# Reports

- Symmetry Audit
  - Goes into detail as to the Employer/ FEIN attached to the Federal and or State W4, talent name and address, form ID, form name, form version, sent date, and completed date

Form Name	Form Version	Sent Date	Completed Date
W-4	2023.12.0	Apr 18, 2024	Apr 18, 2024
W-4	2023.12.0	May 24, 2024	May 24, 2024
W-4MN	2023.12.0	Nov 13, 2023	Mar 27, 2024
W-4	2023.12.0	Sep 21, 2023	Mar 7, 2024
W-4	2023.12.0	Apr 1, 2024	Apr 1, 2024
W-4	2023.12.0	Apr 25, 2024	Apr 25, 2024

## Symmetry Audit Report

Employer	Employer Address	Employer FEIN	Talent User	Talent Home Address	Form ID
Sales	4300 MarketPointe Dr Minne...	454554544	<a href="#">Jimmy Jack</a>	1225 Estabrook Drive Saint P...	W4101
Sales	4300 MarketPointe Dr Minne...	454554544	<a href="#">Samwise Rayman</a>	8512 Pillsbury Ave S Bloomin...	W4101
Sales	4300 MarketPointe Dr Minne...	454554544	<a href="#">test Dahms</a>	1270 Eagan Industrial Rd Eag...	MNI03
Sales	4300 MarketPointe Dr Minne...	454554544	<a href="#">test Dahms</a>	1270 Eagan Industrial Rd Eag...	W4101
Sales	4300 MarketPointe Dr Minne...	454554544	<a href="#">Test Soderling</a>	4657 Castle Drive Eagan, M...	W4101
Sales	4300 MarketPointe Dr Minne...	454554544	<a href="#">Test Soderling</a>	4657 Castle Drive Eagan, M...	W4101



# A Client's Journey

---





# About The Reserves Network:

- Founded in 1984; with Avionté since 2012
- Place more than 20,000+ annually
- Over 1,000+ active clients across industries
- 40 operating locations across the country
- Temporary, Temp-to-Hire, Direct Hire





# About Danielle:

- **Danielle Owen**
- Director, Learning & Performance
- 11 years with The Reserves Network
- Served in the Air Force in Information Technology & Communication



*THE*

*RESERVES*

*NETWORK*



# What's Ahead

---



# Help Us With What's Upcoming!



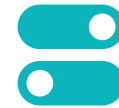
## TASK EXPIRATION

- Configuration to automatically expire Onboarding tasks
- Adjust automation logic to prevent re-sending if a document is still considered valid



## CERT AUTO-UPKEEP

- Automatically resend Certification task when certificate has upcoming expiry
- Configure specific Certificates to expire



## RESUME OPTIONAL

- Configure whether or not an uploaded resume document is required to complete a Resume task



## MULTI-LINGUAL

- We are currently in strategic discussions for approaches to support multi-lingual onboarding
- Larger body of work

Visit the Experience Center to let us know which Avionté 24/7 Onboarding projects you're interested in!





# Questions & Answers

---

**Thank You**

**Rate the session**

☆ ☆ ☆ ☆ ☆

Leave further feedback...

SEND

Cancel

# Rate This Session

## IN THIS BIZZABO APP:

- Open the Bizzabo app
- Select the Agenda tab from the main screen
- Locate this session by Name, Date and Time
- Rate the session
- Optional to leave further feedback

**THANK YOU FOR YOUR FEEDBACK**

