AVIONTÉ

CONNECT

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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:

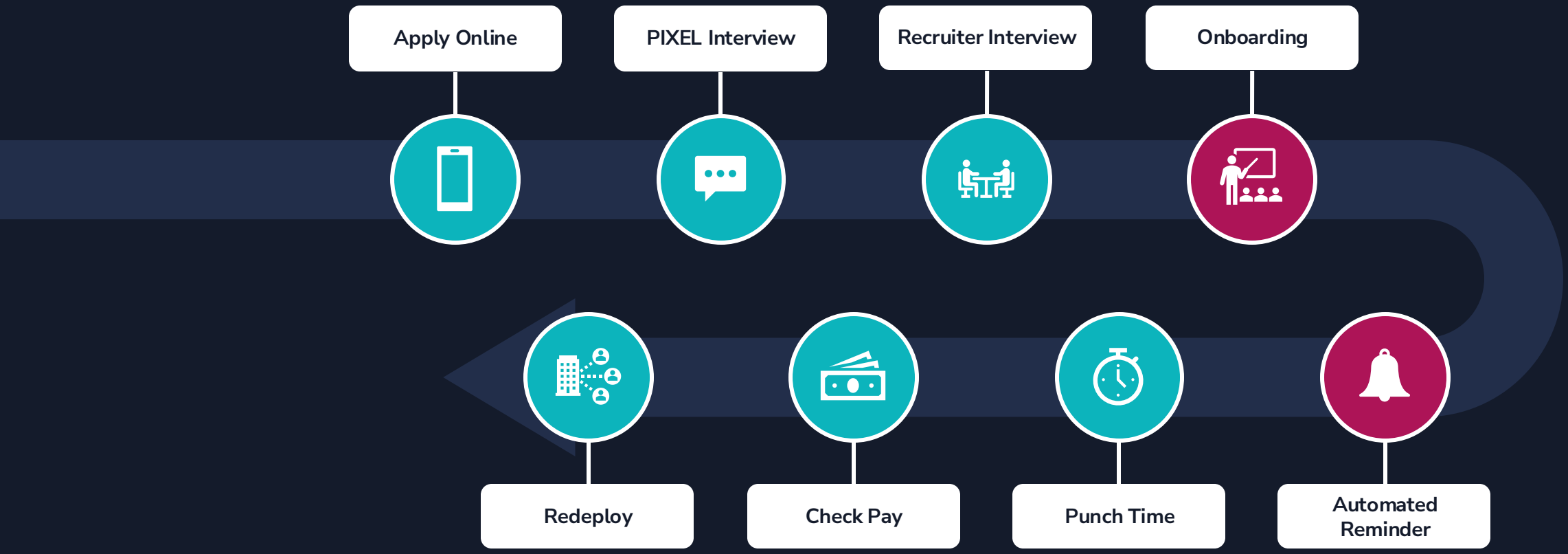
- **Mattie Silverman**
- Senior Project Manager
- Been with Avionté since 2020
- Coaches youth wrestling

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

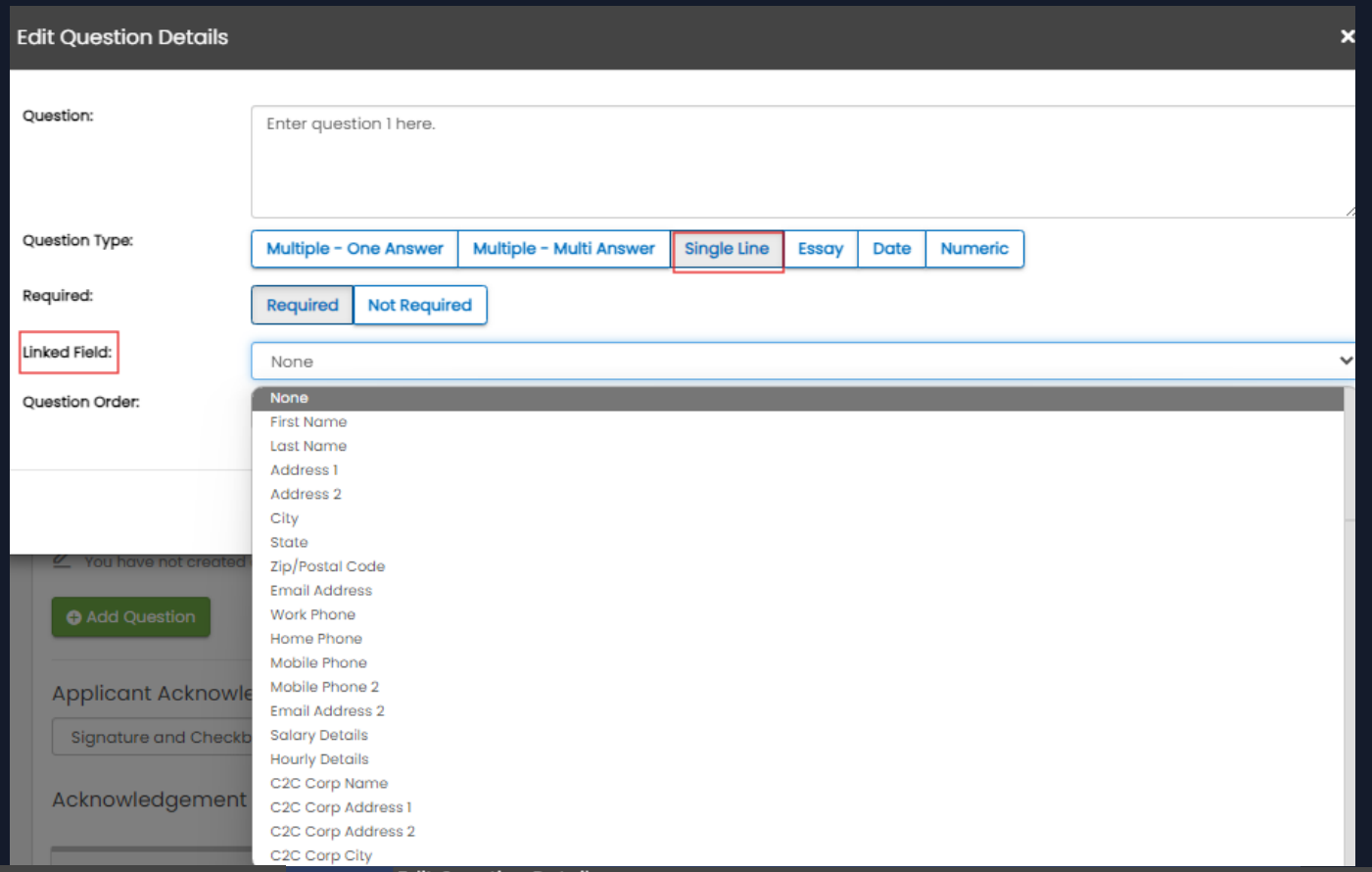
Configuring Tasks & Workflows

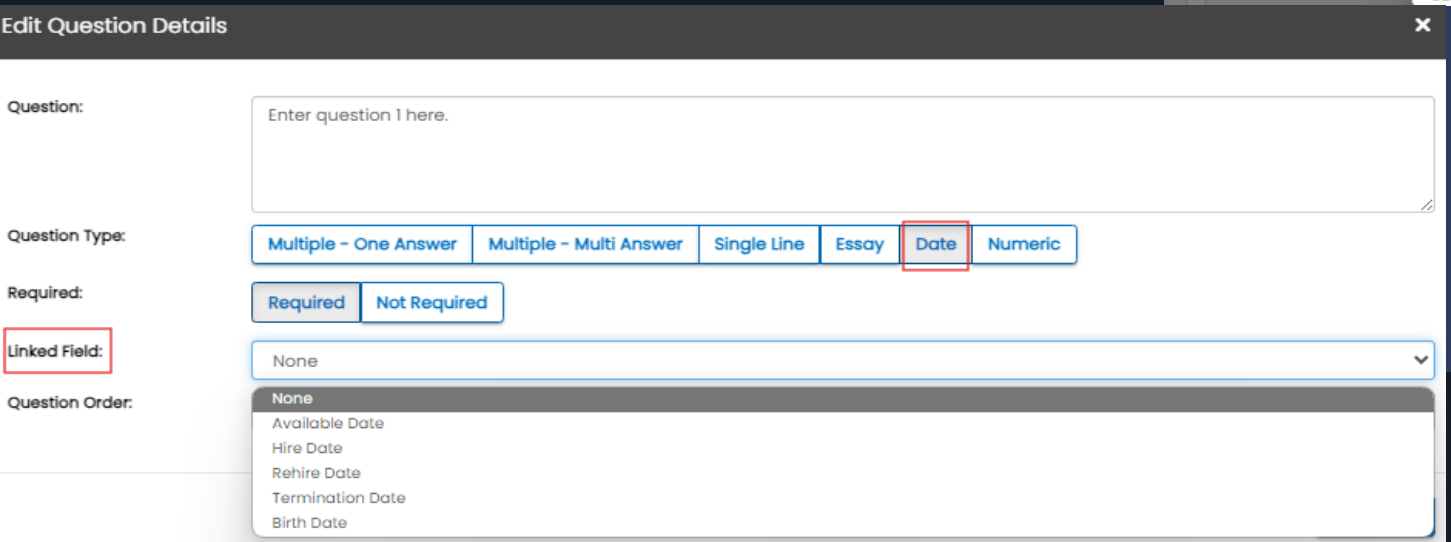
TASKS

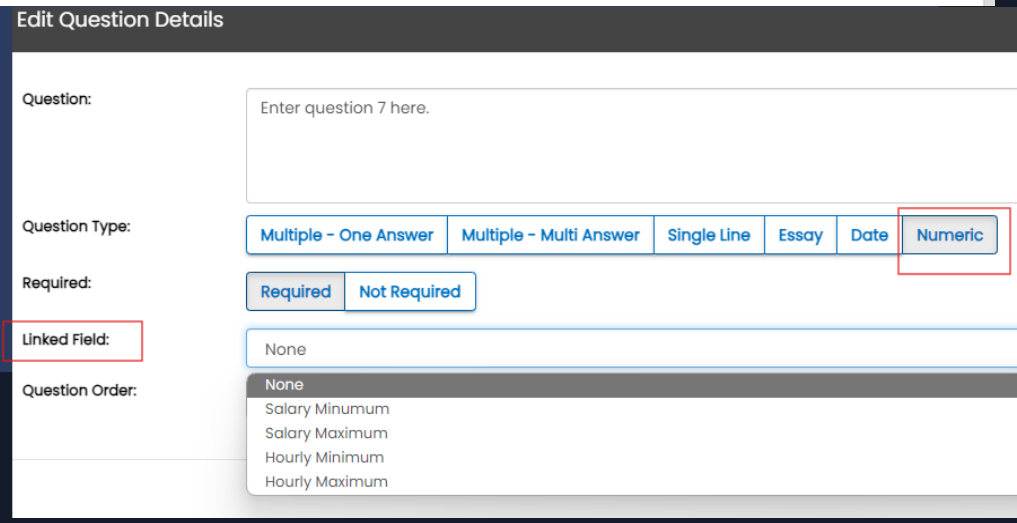
Questionnaires

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

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







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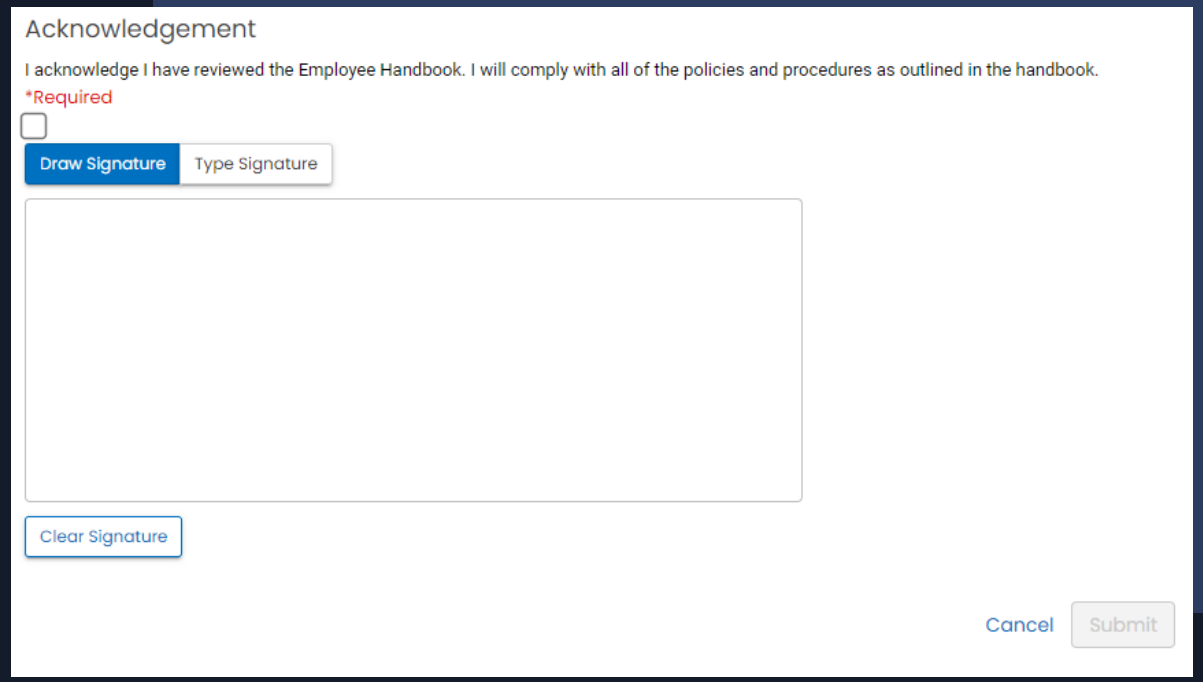
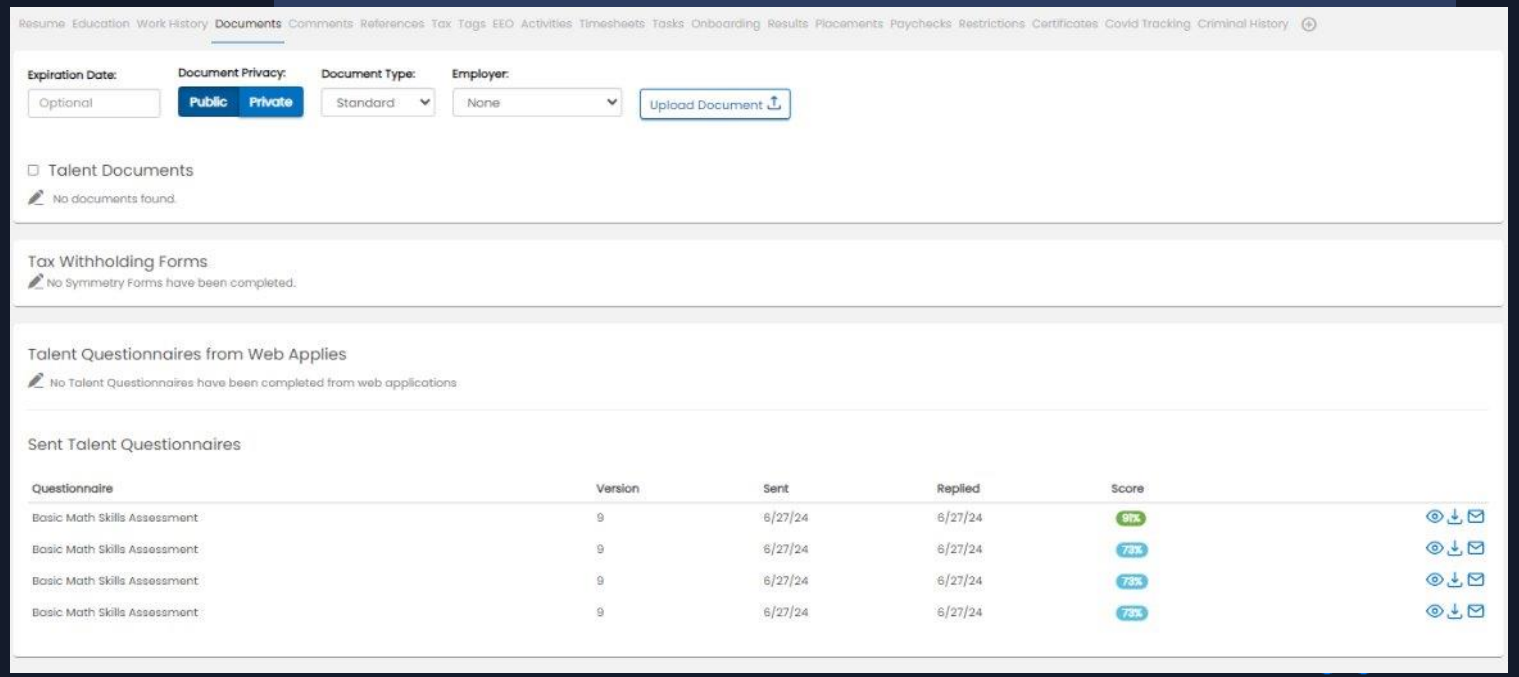


TASKS

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)



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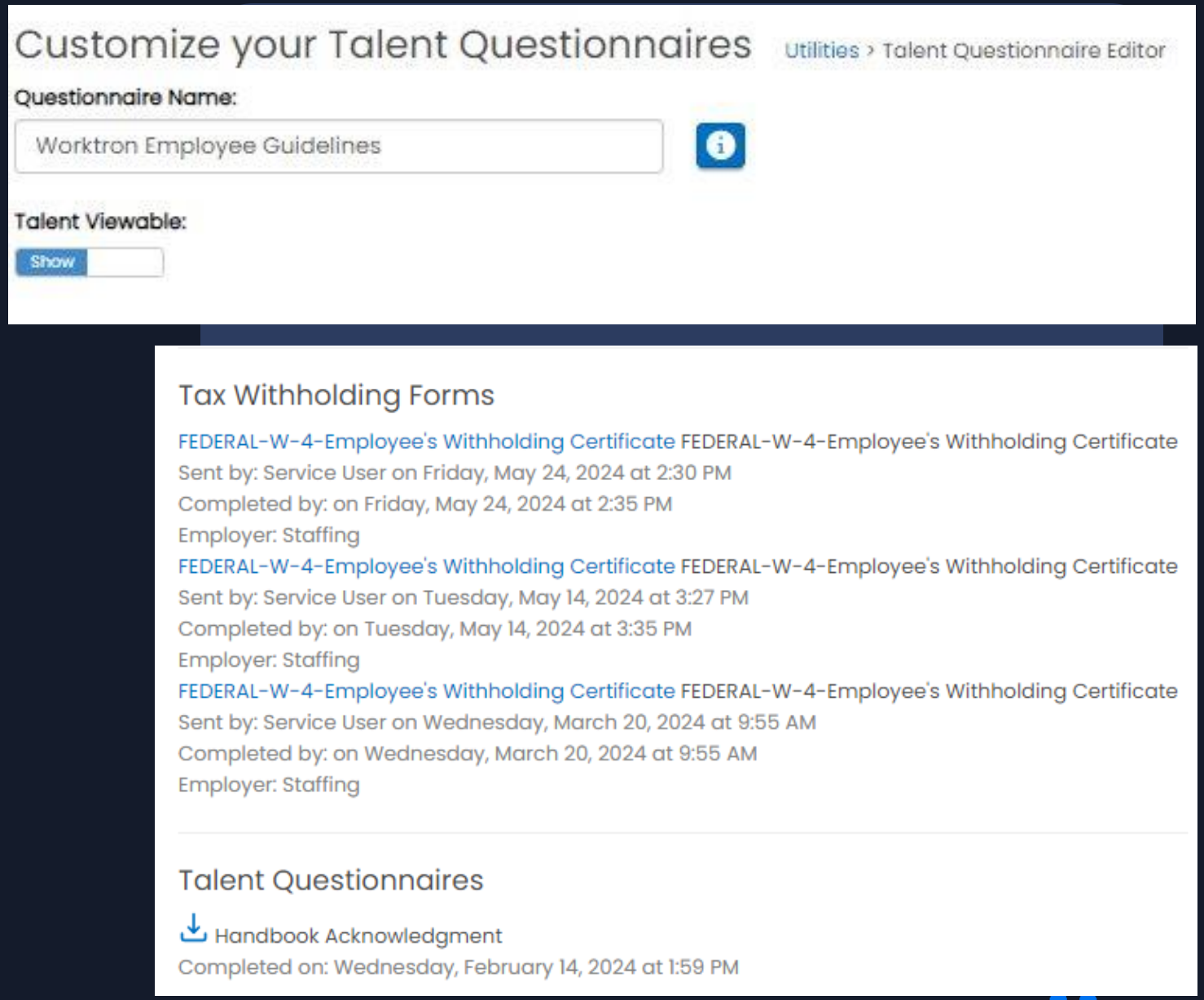
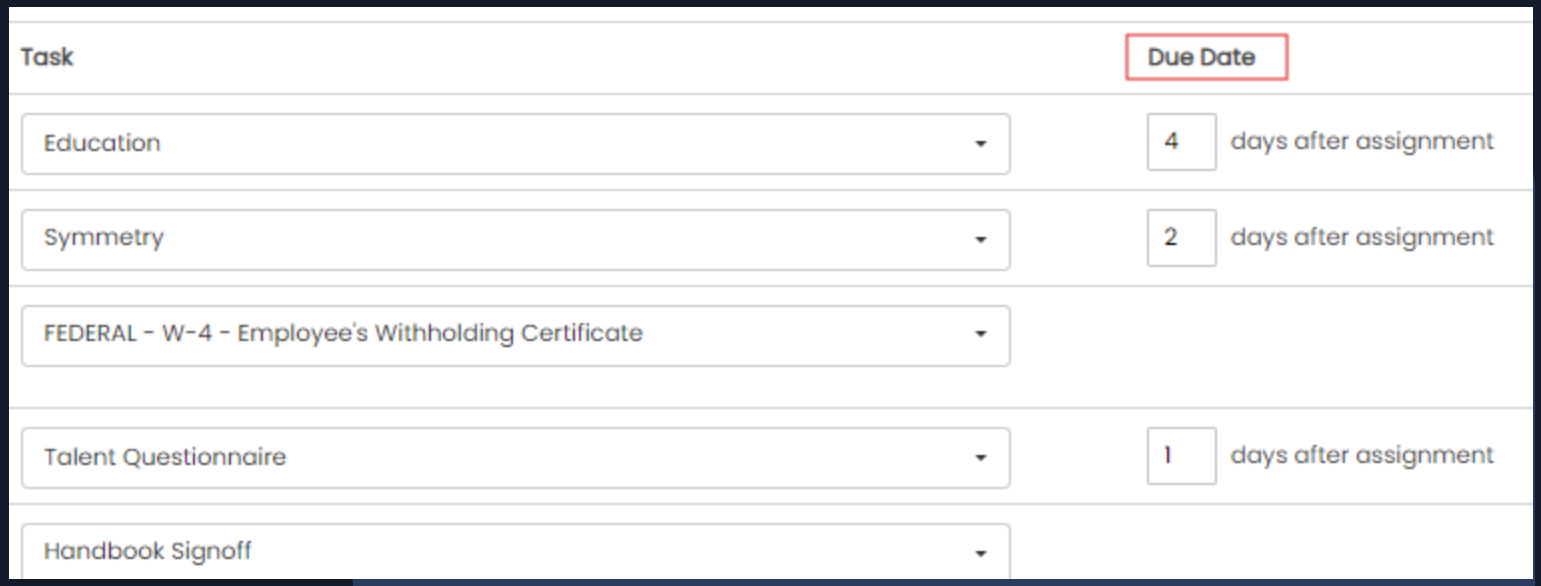


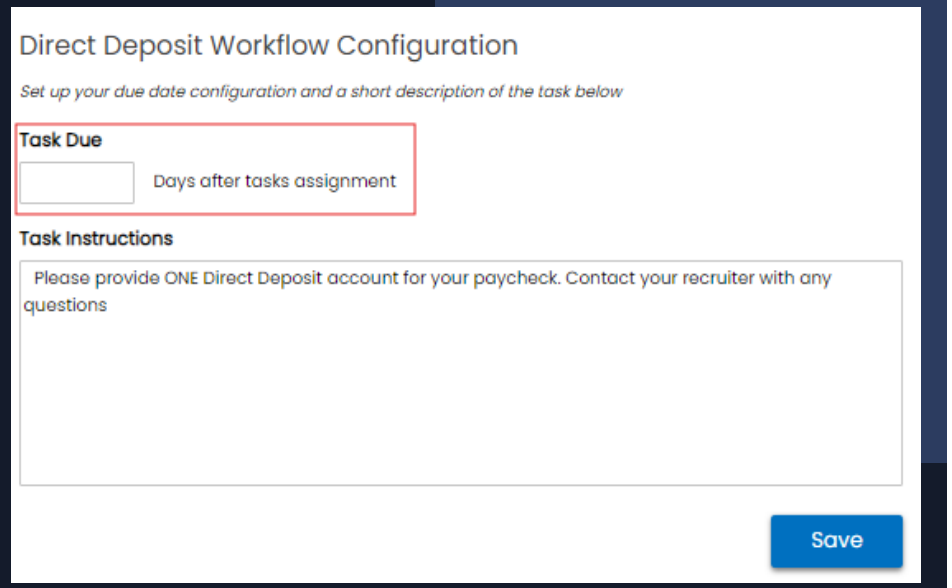
TASKS

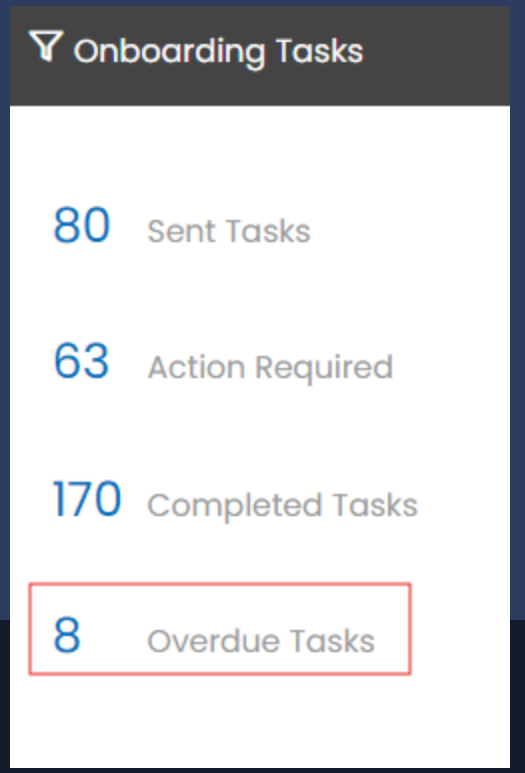
Due Date

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





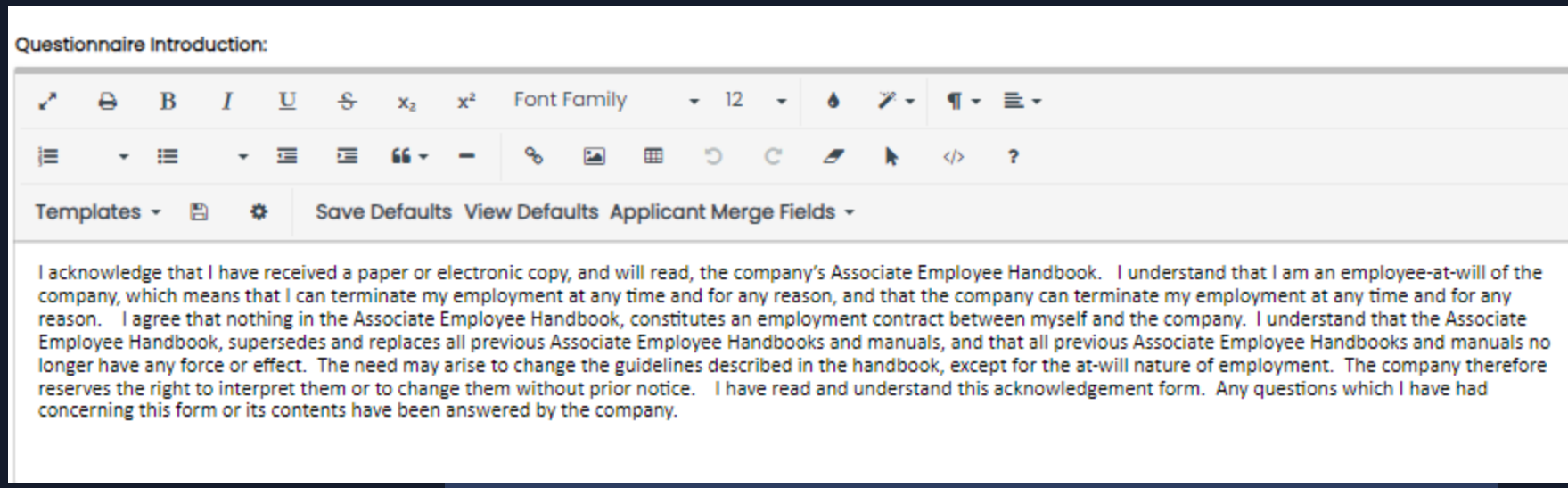


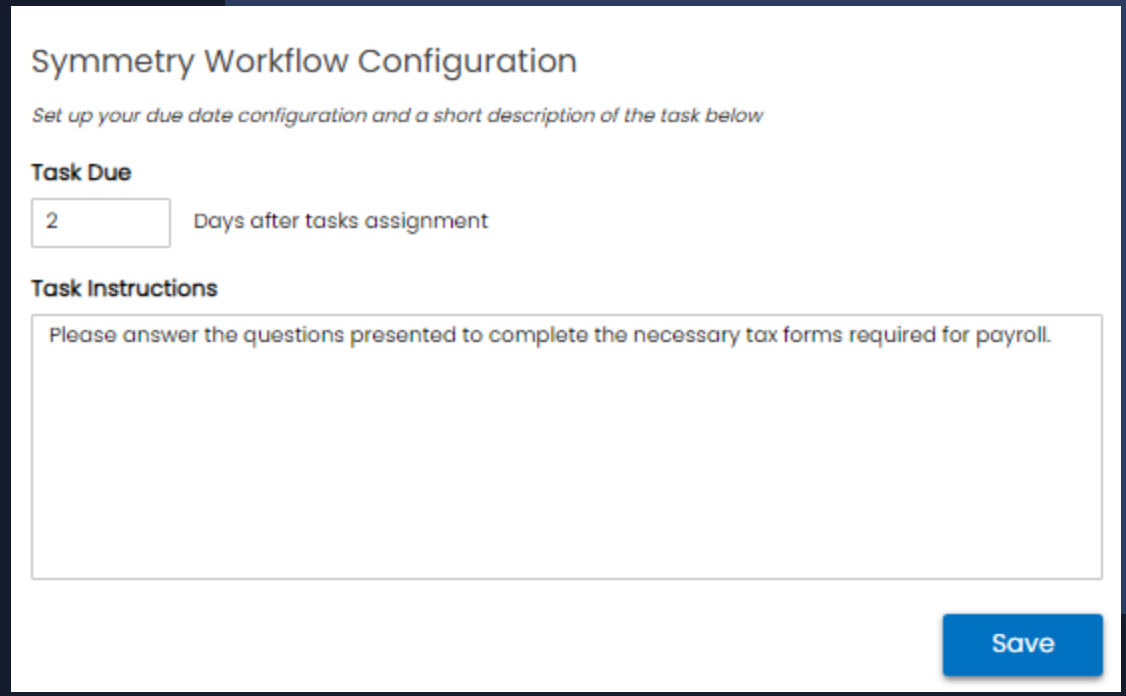
TASKS

Instructions

You can now add in instructions in a few different places

- Talent Questionnaire
- Symmetry Workflow
- Onboarding Tasks





Onboarding Tasks

Certifications	On
Competencies	On
Direct Deposit	On
Education	On
Equal Employment Opportunity	On
Personal Info	
Resume	On
Talent Questionnaire	On

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

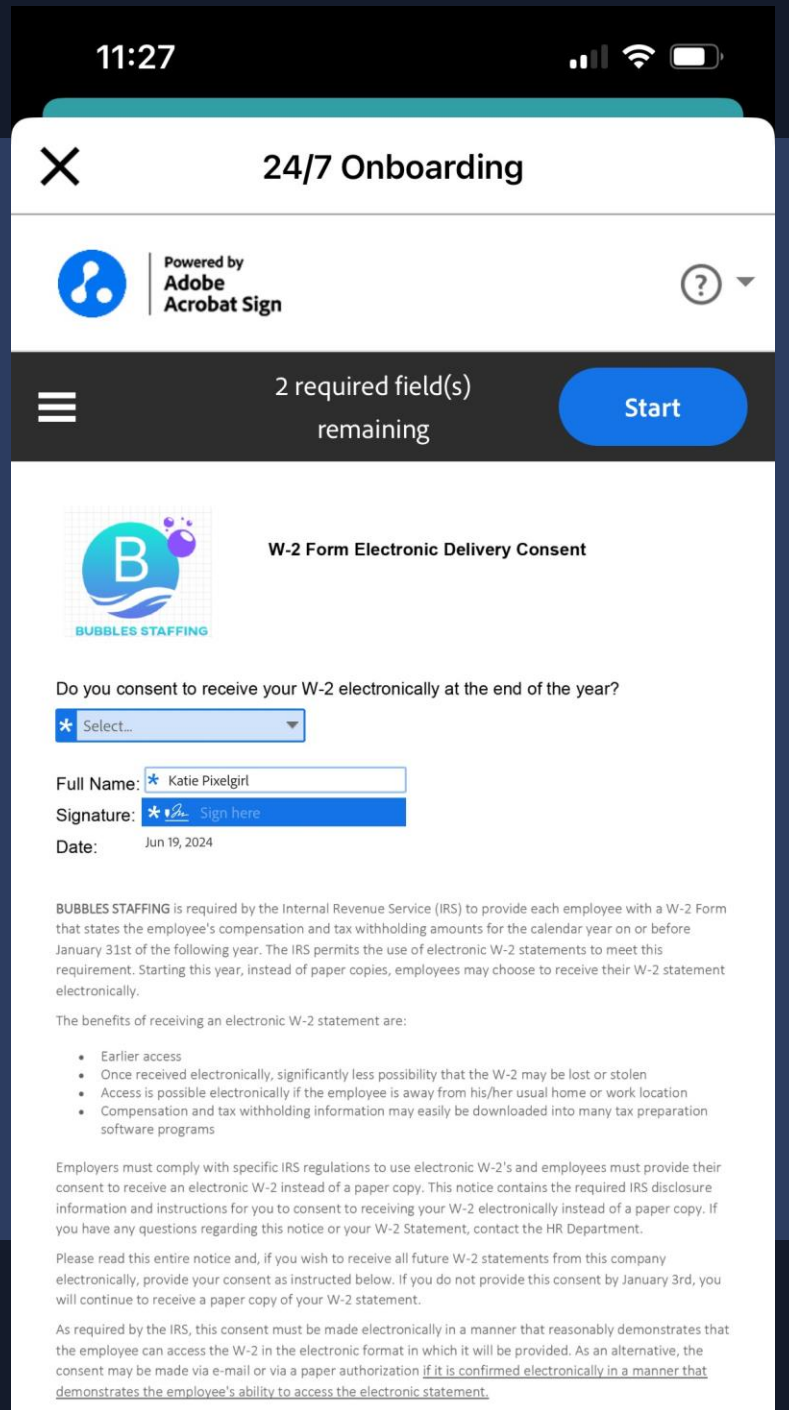
Please provide ONE Direct Deposit account for your paycheck. Contact your recruiter with any questions

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

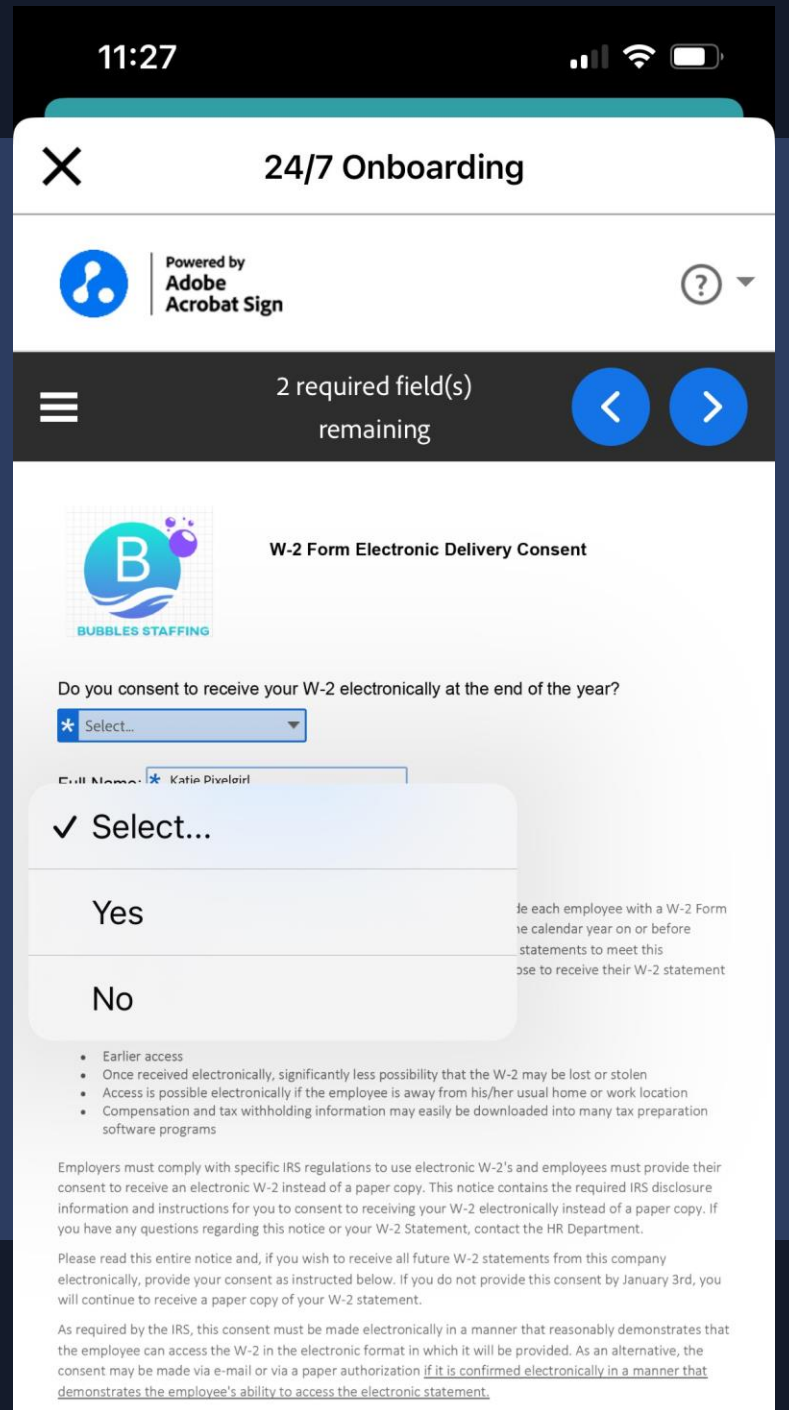


INTEGRATIONS

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

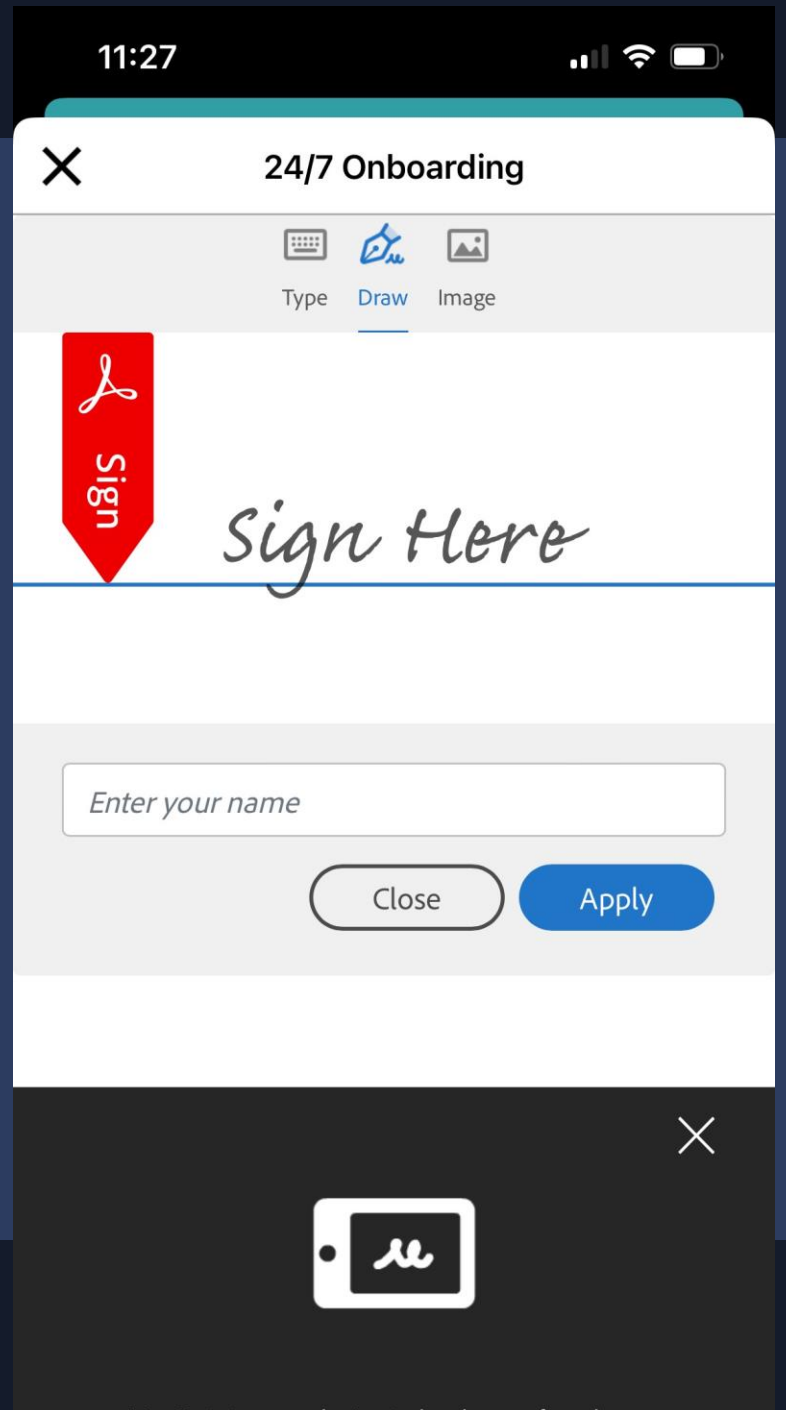


INTEGRATIONS

Adobe

You can still use Adobe!

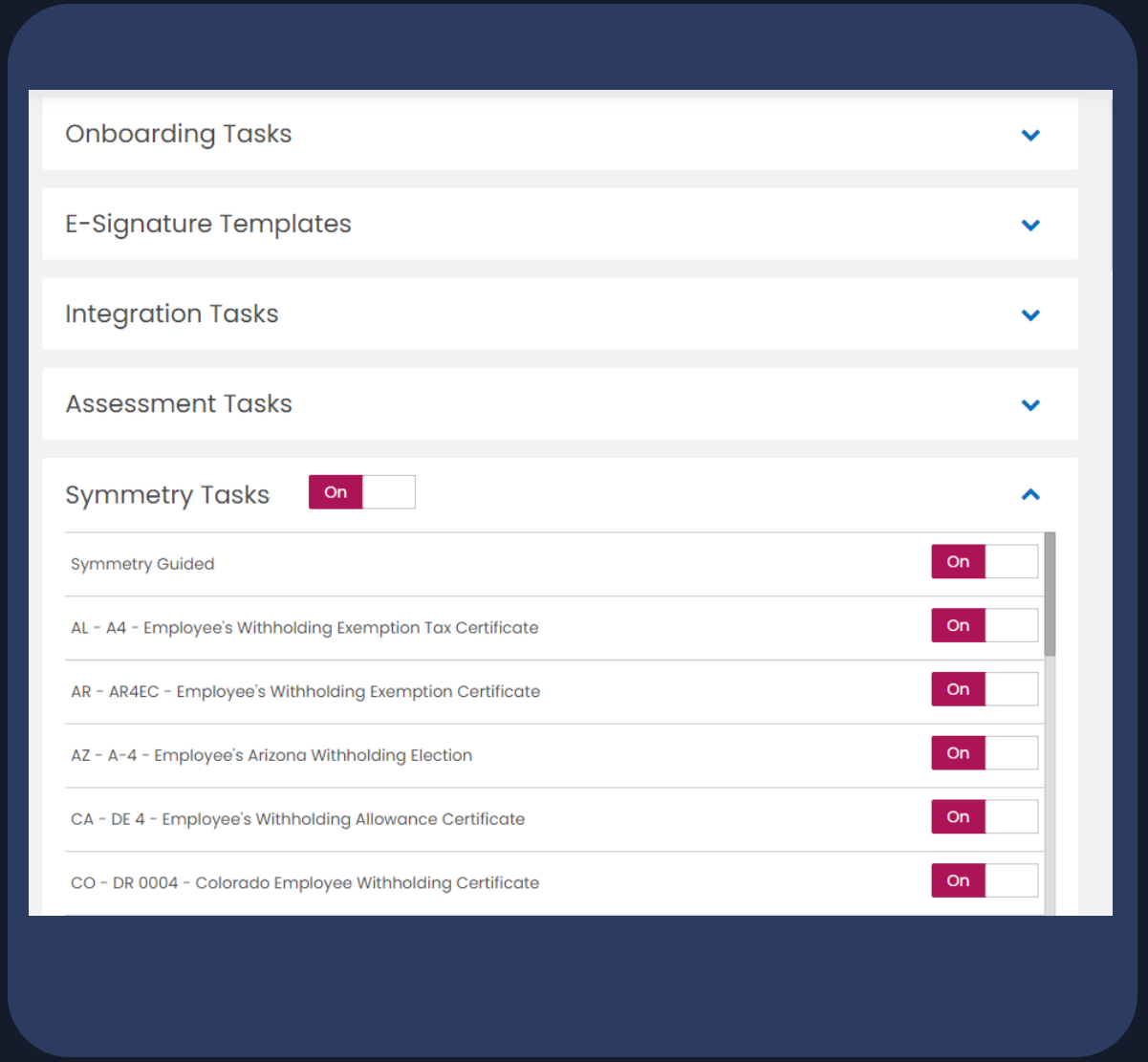
- Key mappings still exclusively in Adobe
- Not mobile-friendly view of document, but still able to be completed via app with mobile-friendly signature
- Previously completed & historical Adobe documents will not go away



INTEGRATIONS

Symmetry

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



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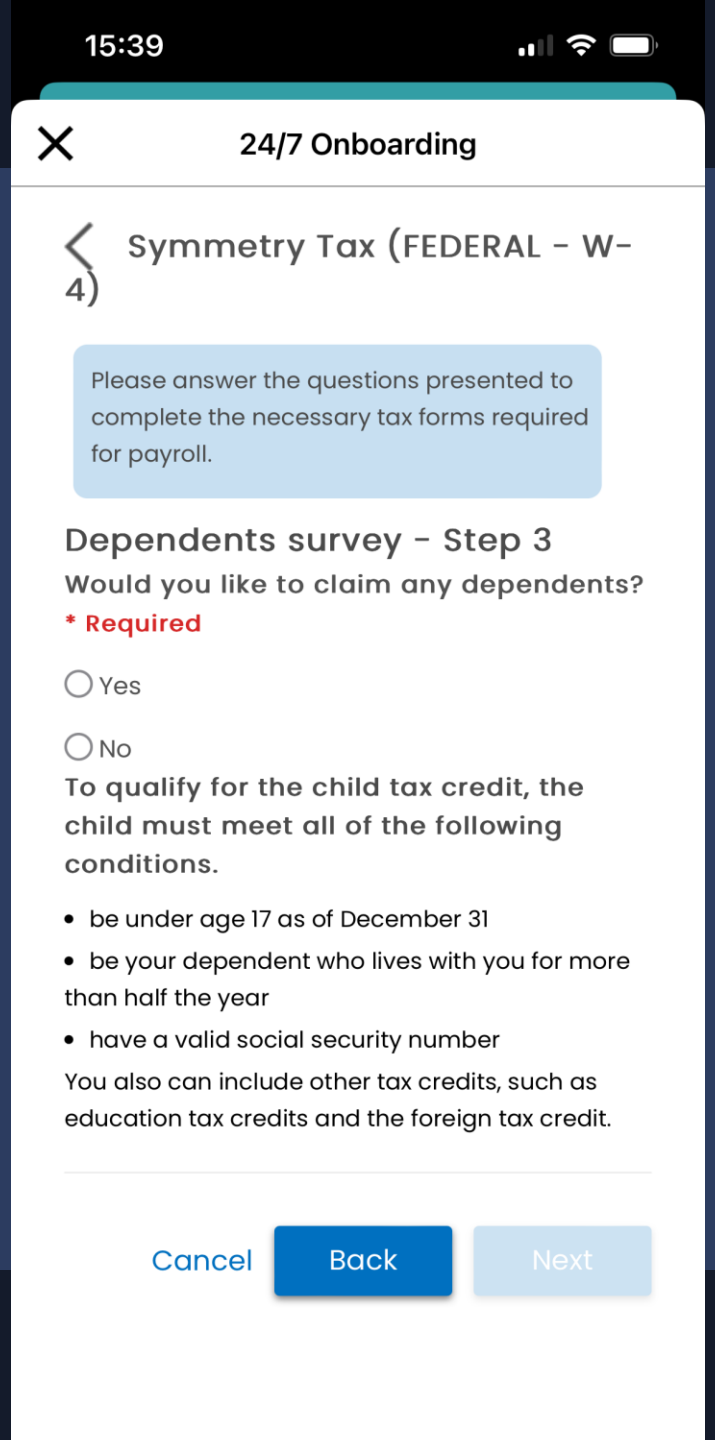
- Withholding information maps to Back Office
- Mobile-friendly! Preferred way to collect state and federal withholding



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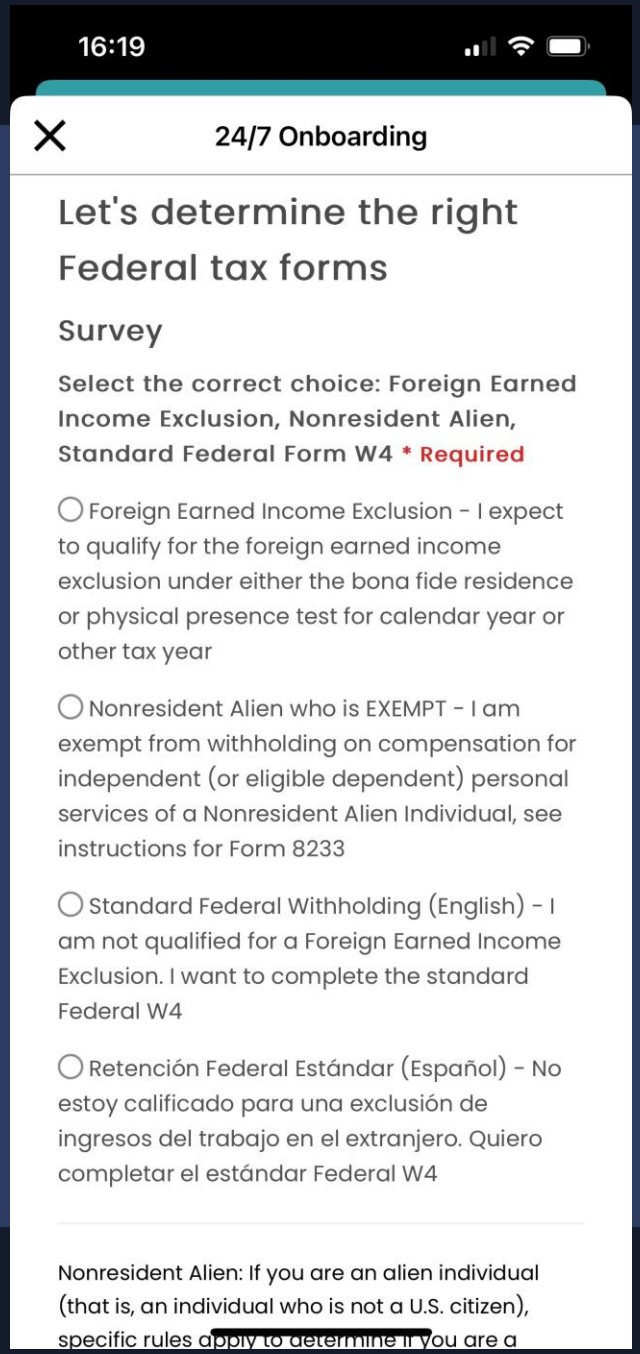
- "Guided" option for Pipeline/Nomination: looks at worksite & residential address to determine correct forms for Talent



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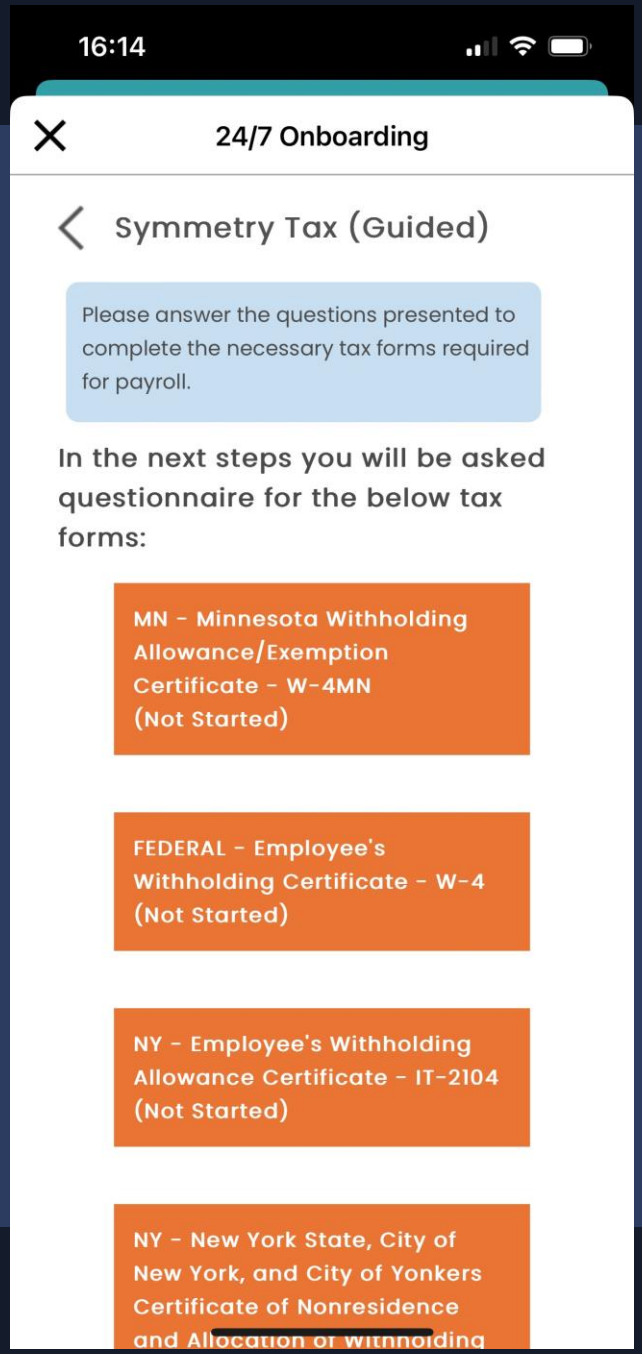


TASKS

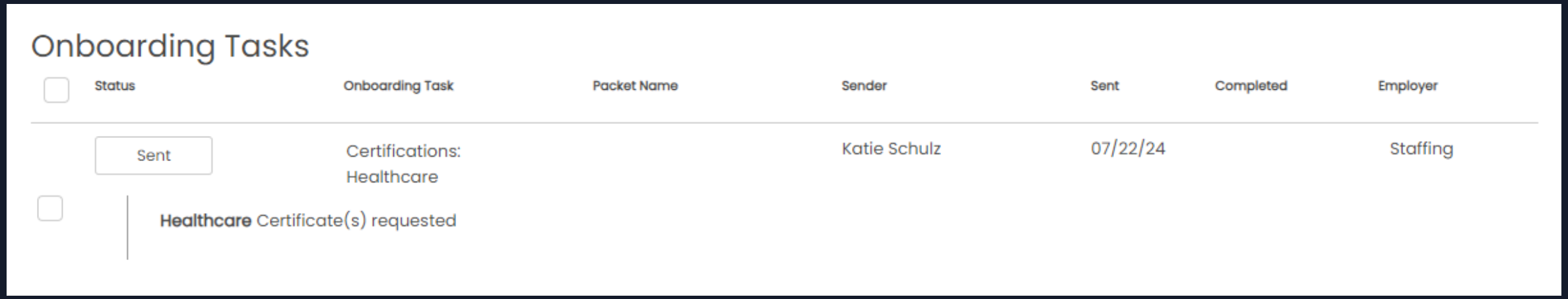
Certification Task Enhancements

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

RECRUITER VIEW



TALENT VIEW

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

5 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

Select Certificate

Certificate name is required.

Issue Date

mm/dd/yyyy

Issue date is required.

Expiration Date

mm/dd/yyyy

Issuing Authority

None

Certificate Number/ID

ex: 1234560

Certificate number is required.

Notes

Enter any additional information here

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 Certification Document

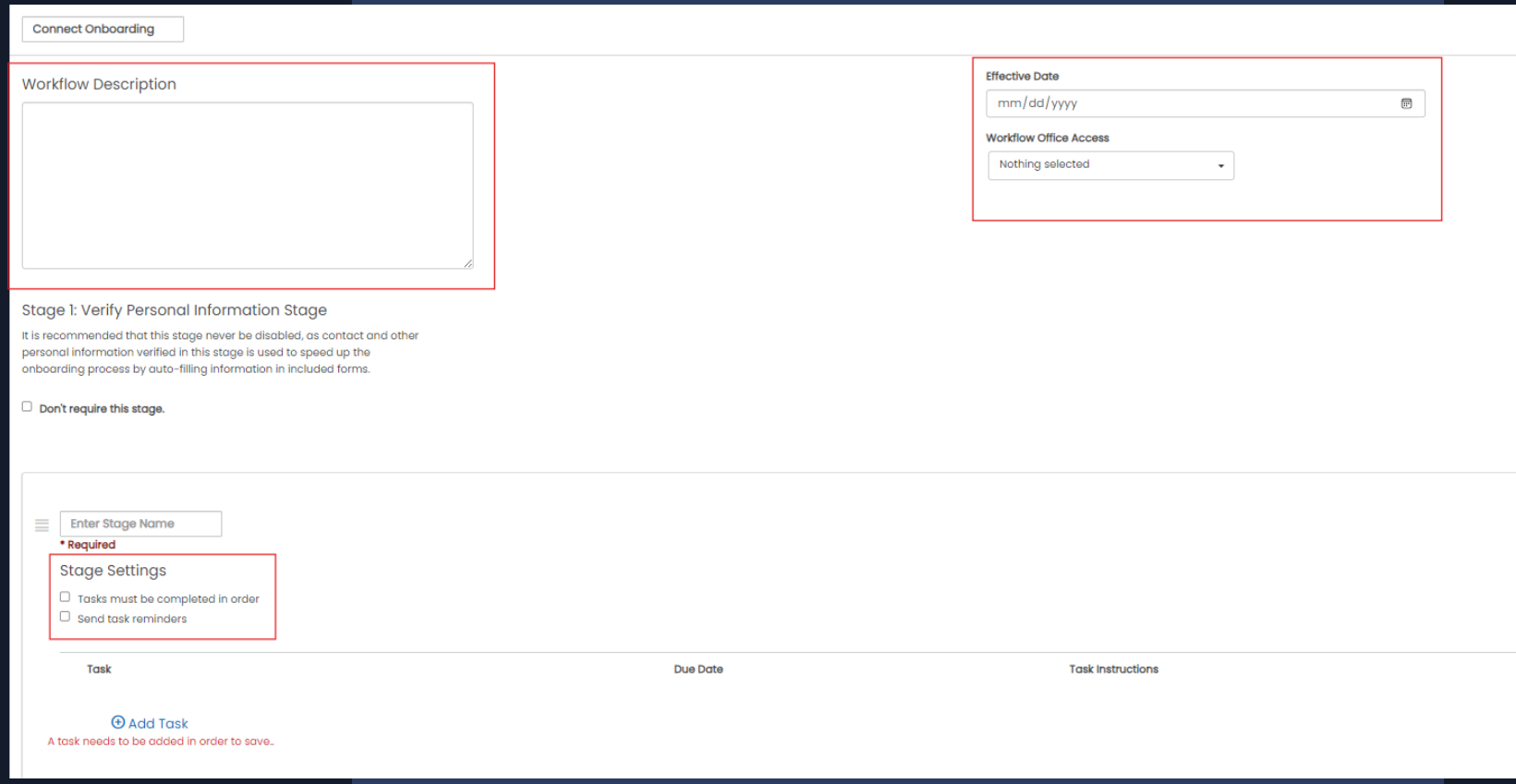
Upload Document is required.

WORKFLOWS

Onboarding Workflows

Workflows versus Legacy Packets

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



WORKFLOWS

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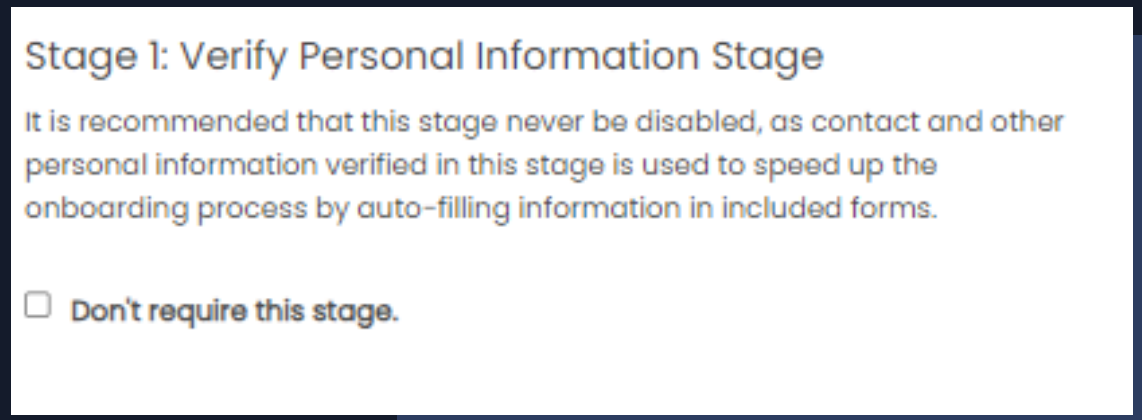
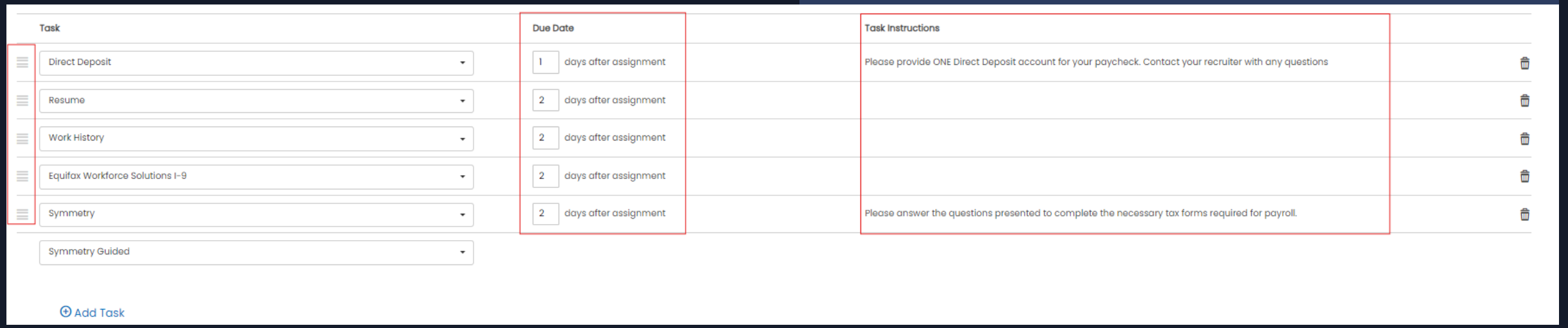




Talent Engagement

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!"

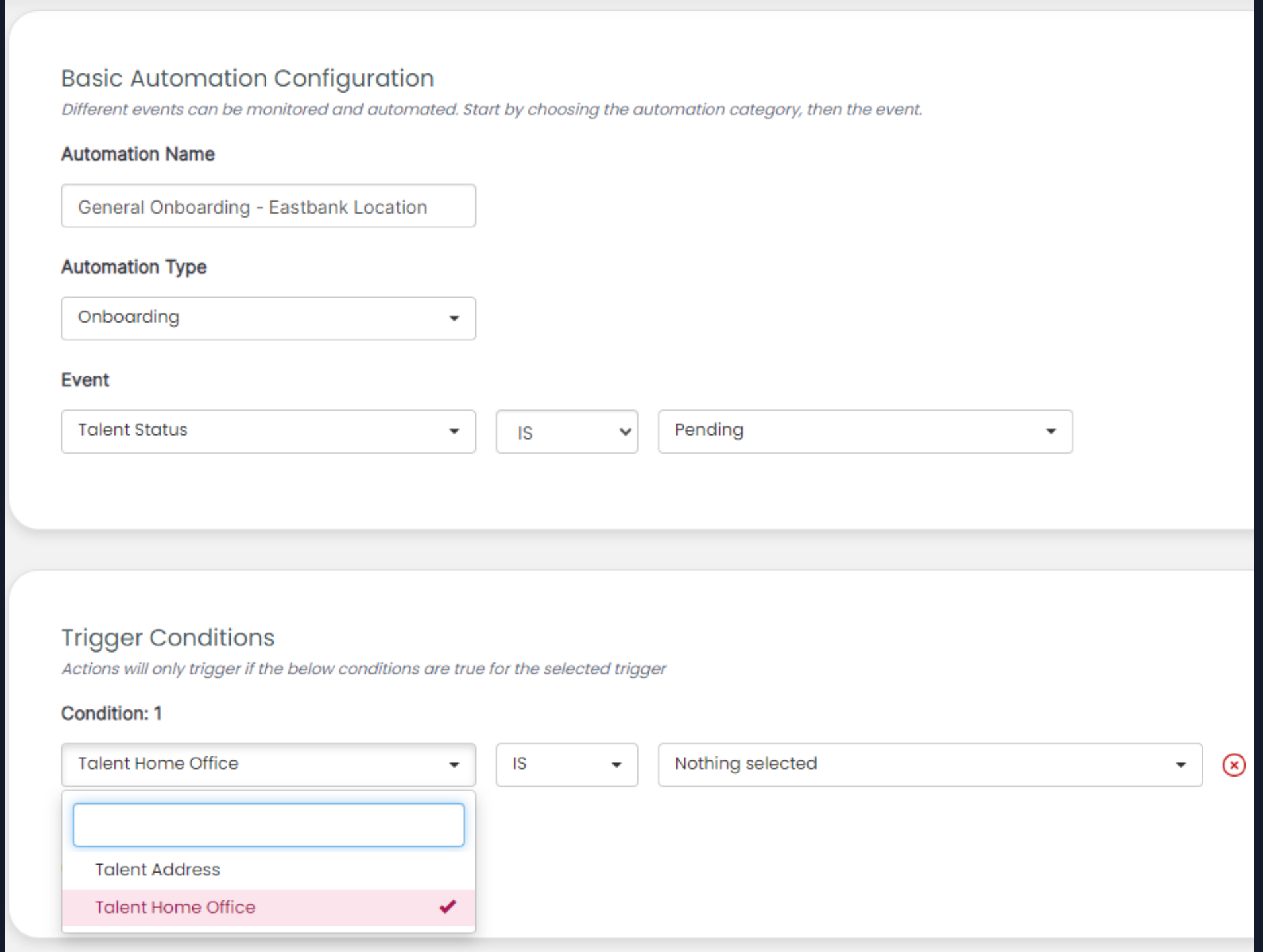
Configuring Automation

AUTOMATION

What's New

Conditions for Rules

- Talent Status
  - Talent Address
  - Talent Home Office

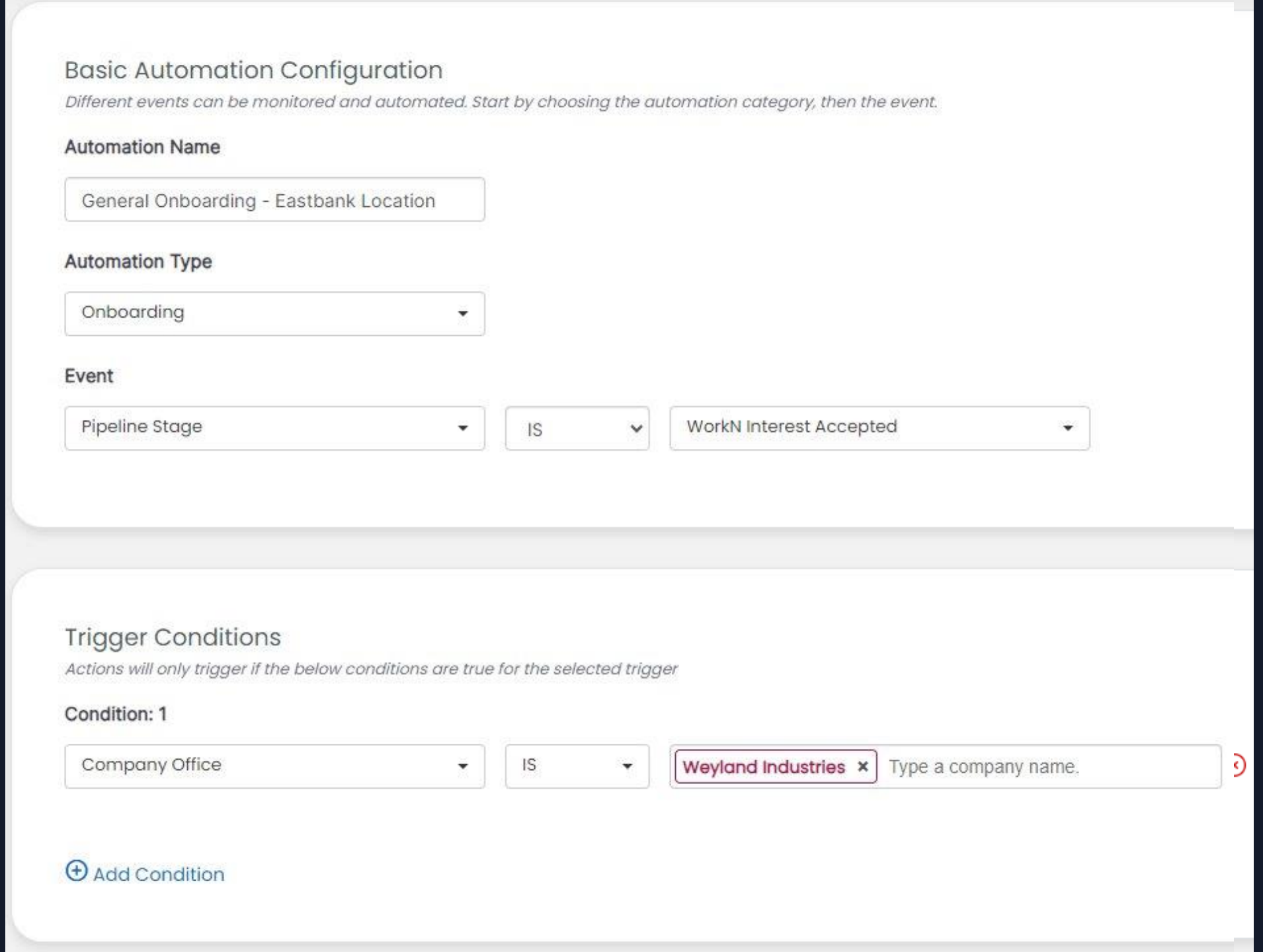


AUTOMATION

What's New

Conditions for Rules

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

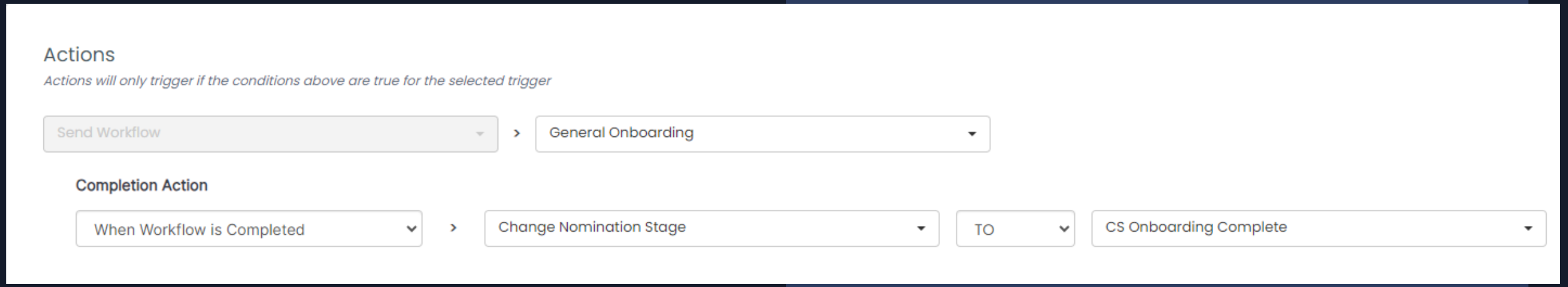


AUTOMATION

What's New

Completion actions enhanced:

- Pipeline into Nomination
- Rule Chaining



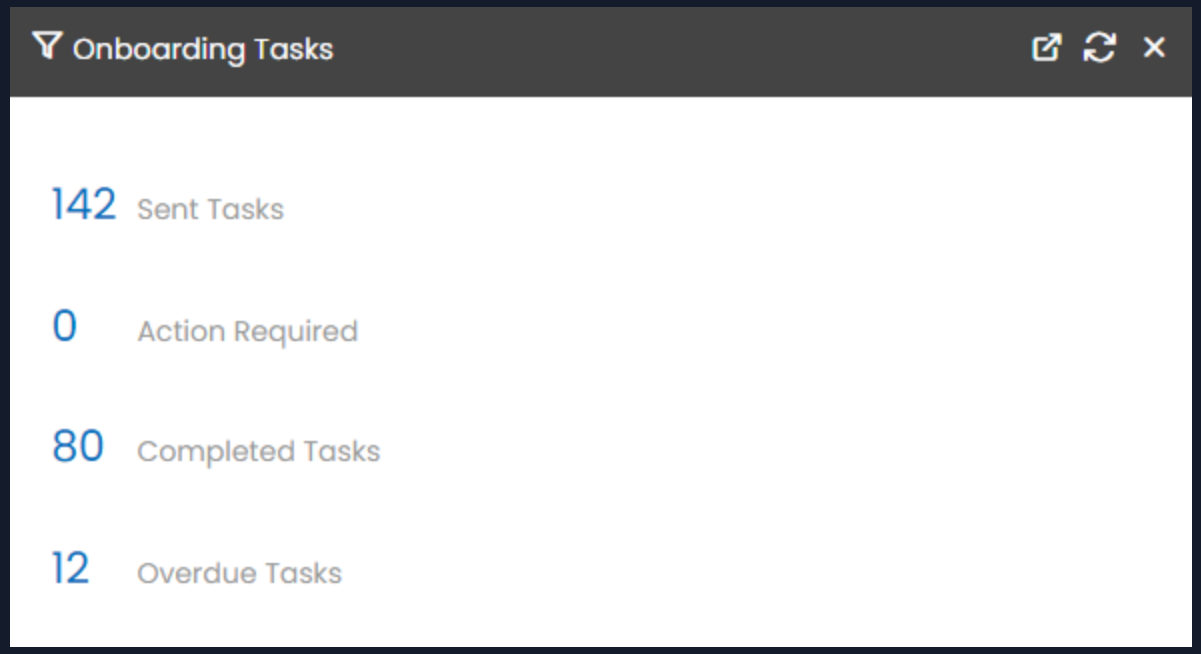
Widgets & Reporting

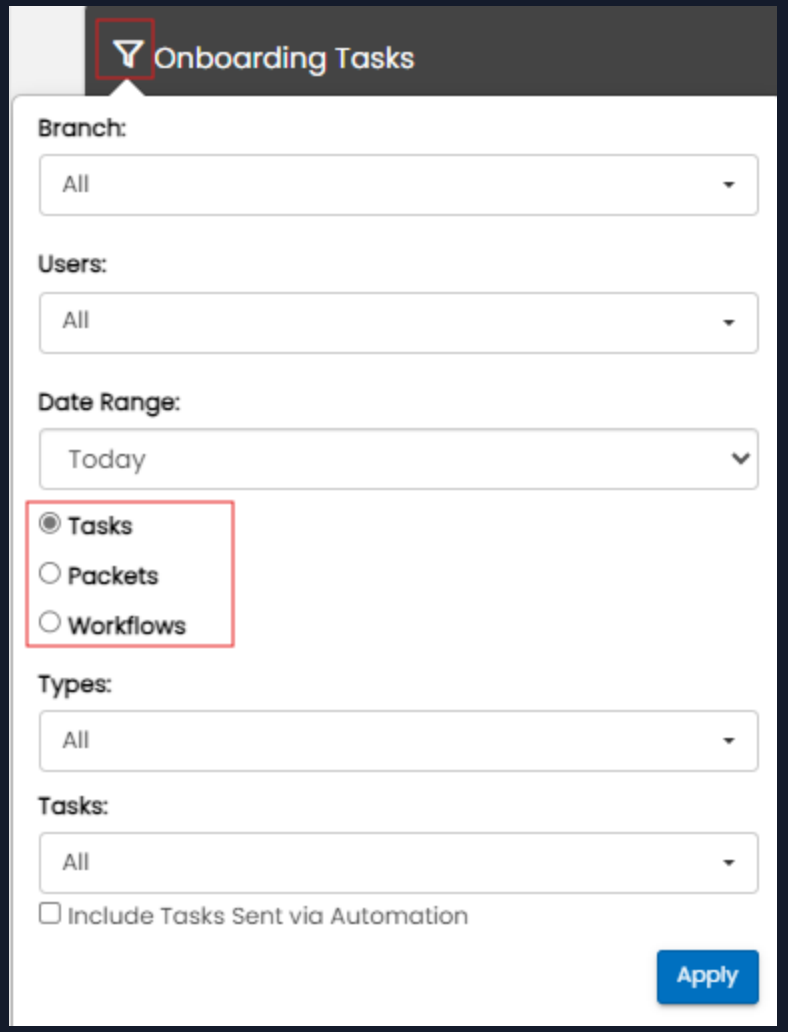
WIDGETS

MyDashboard Widgets

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

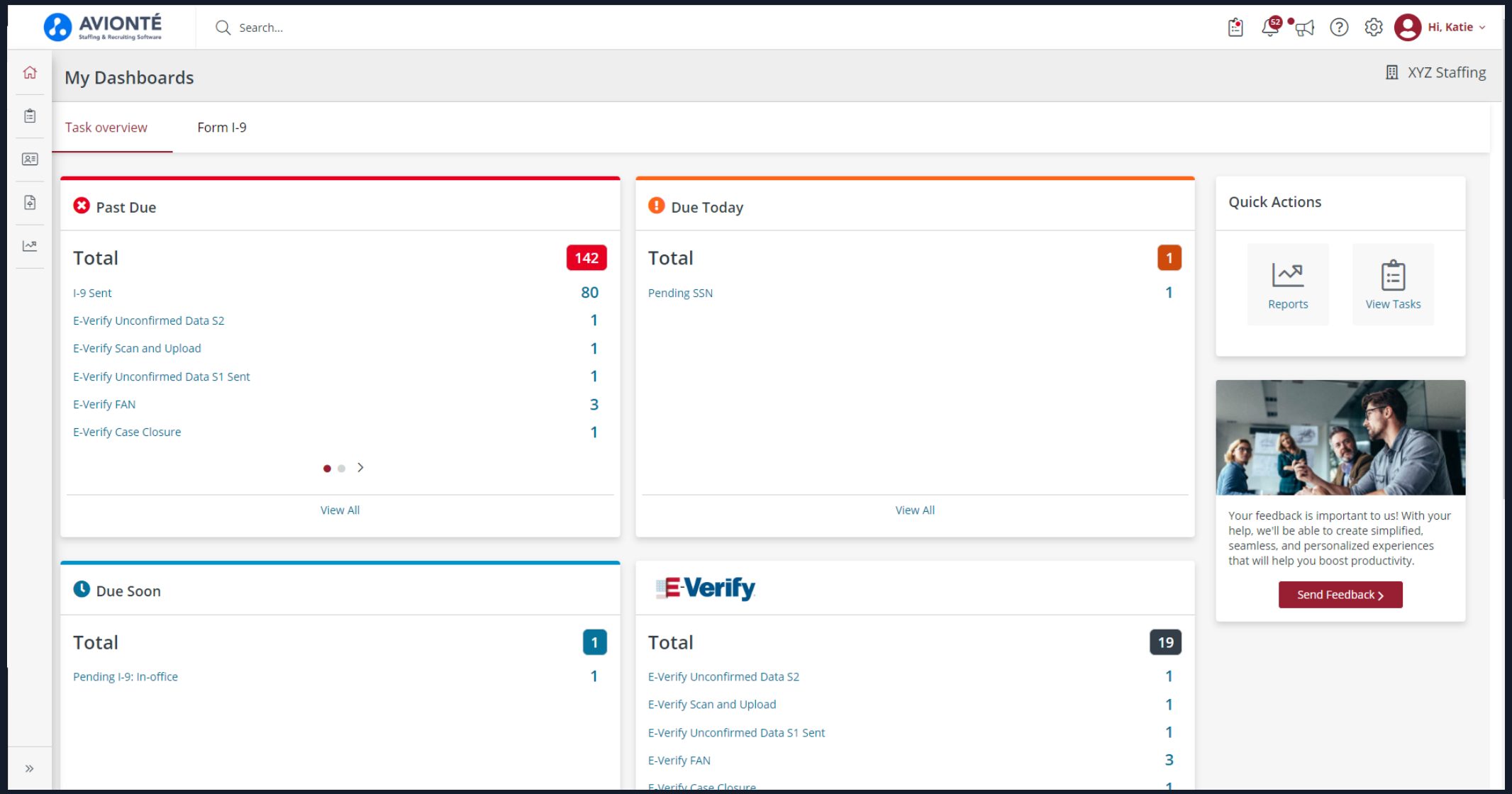
- Onboarding Tasks Widget
  - Extra tracking items such as overdue tasks and a link to the Equifax i9 dashboard
    - You can update the FEIN the i9 was placed under if it was done in error





WIDGETS

Where you can take action on your TNCs!

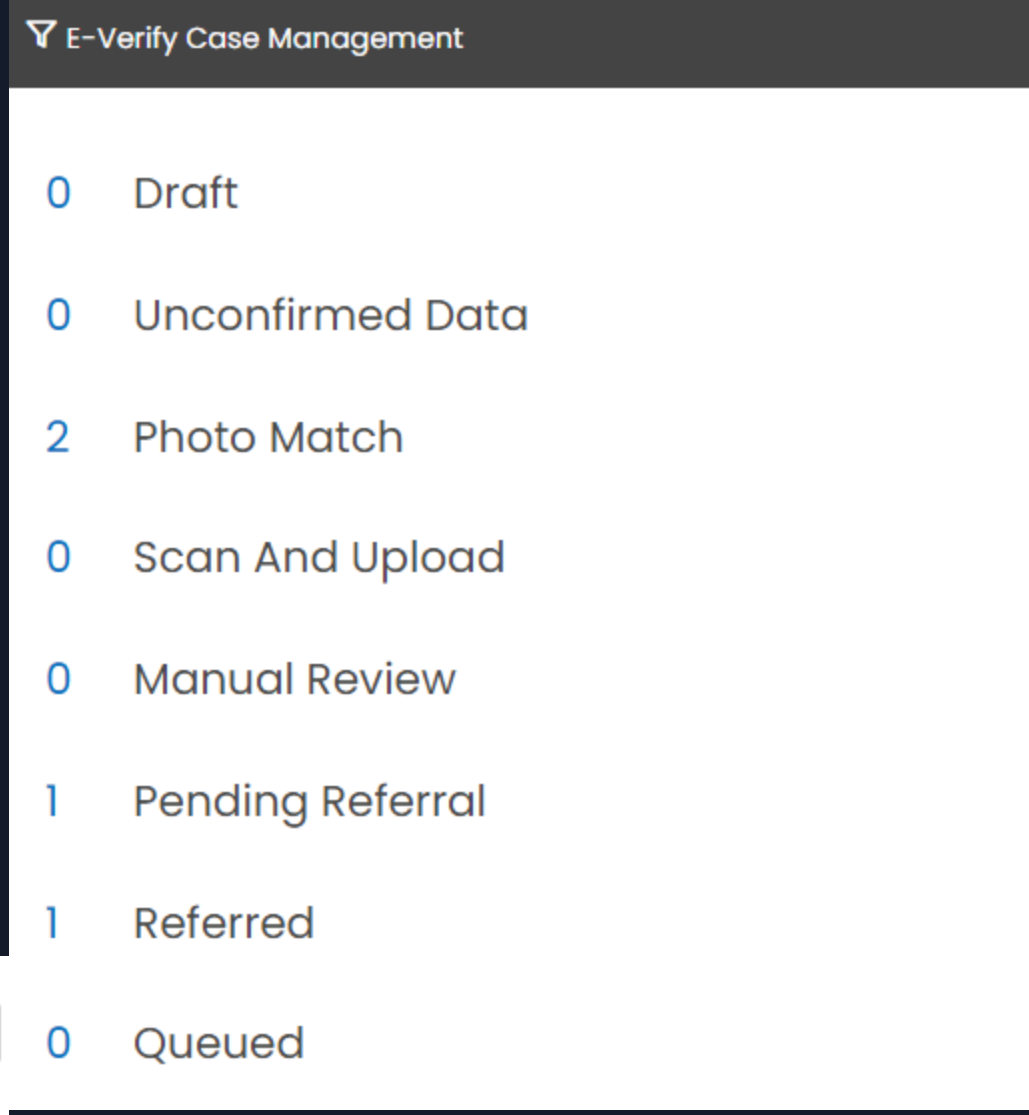


WIDGETS

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



WIDGETS

MyDashboard Widgets

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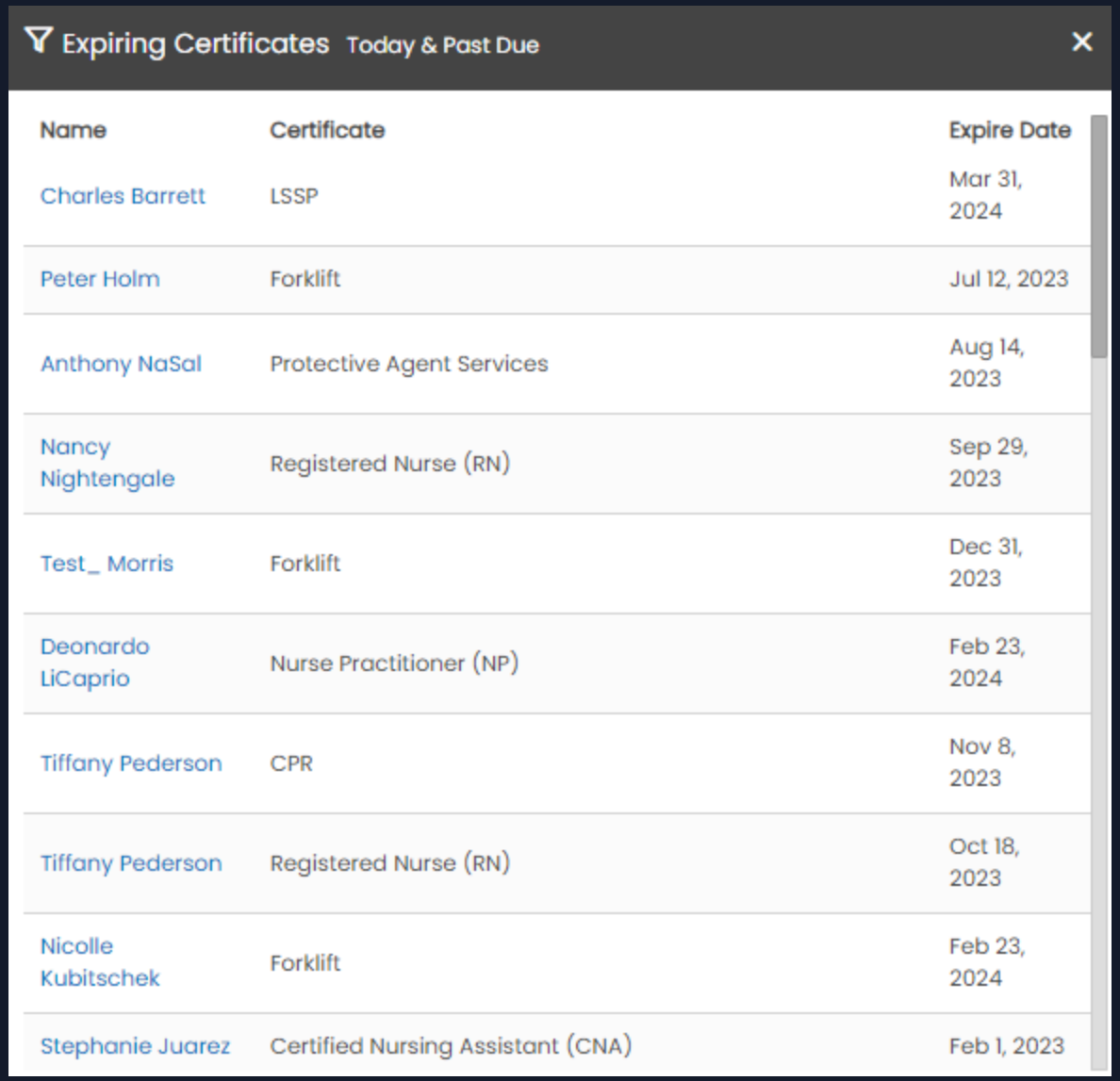
- Expiring Certifications Widget
  - You can review certifications that are set to expire.

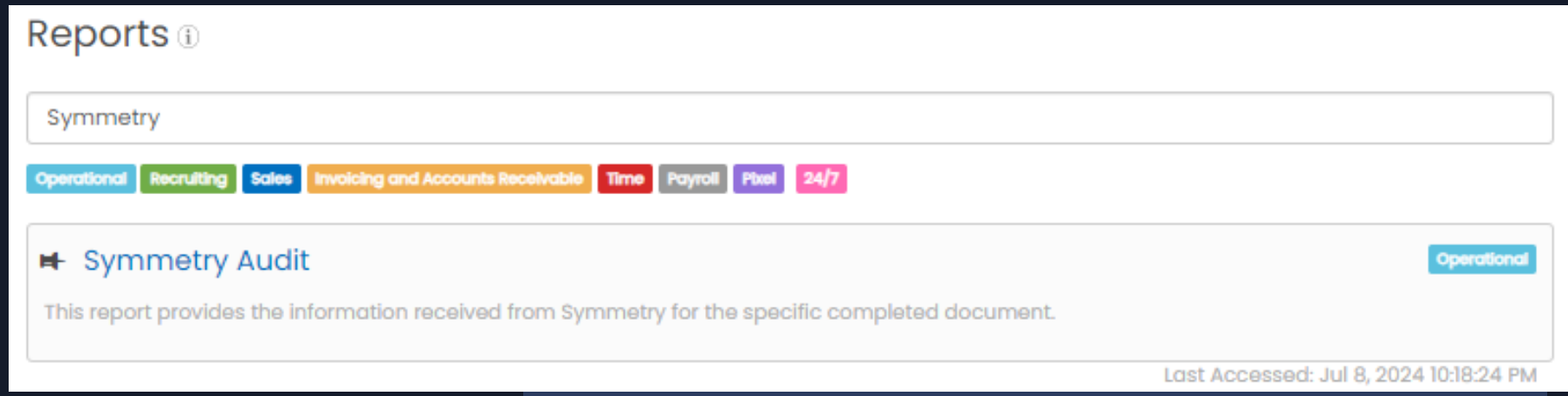


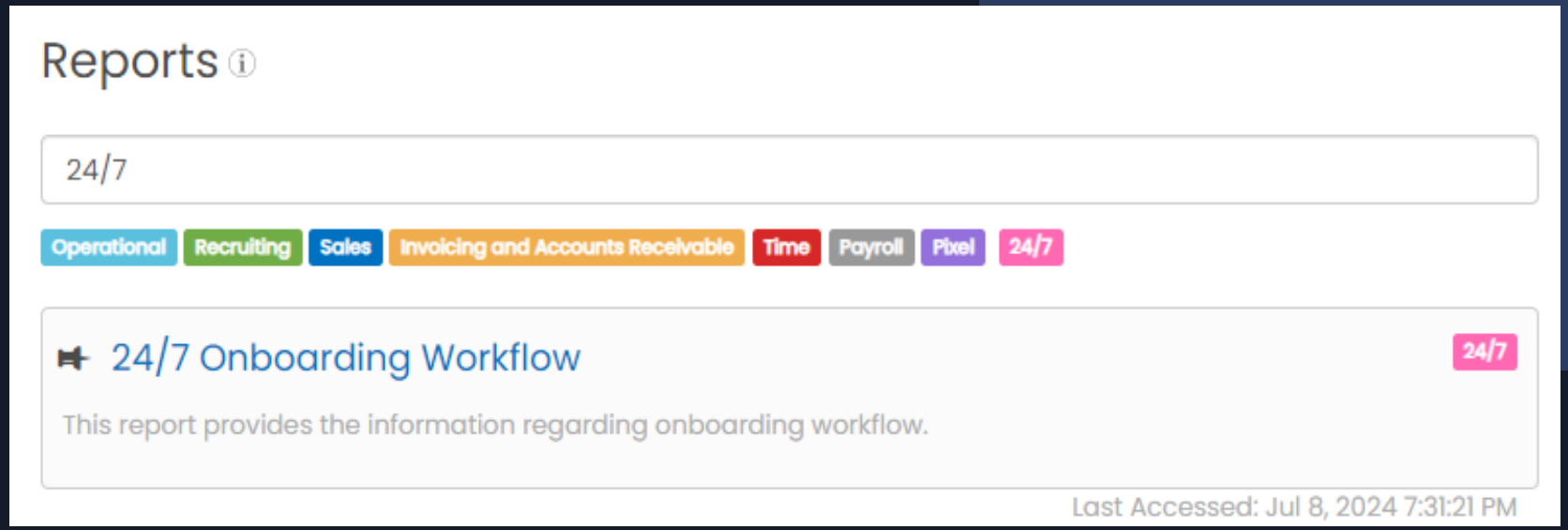
ANALYZE

Reports

There are two main reports

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





ANALYZE

Reports

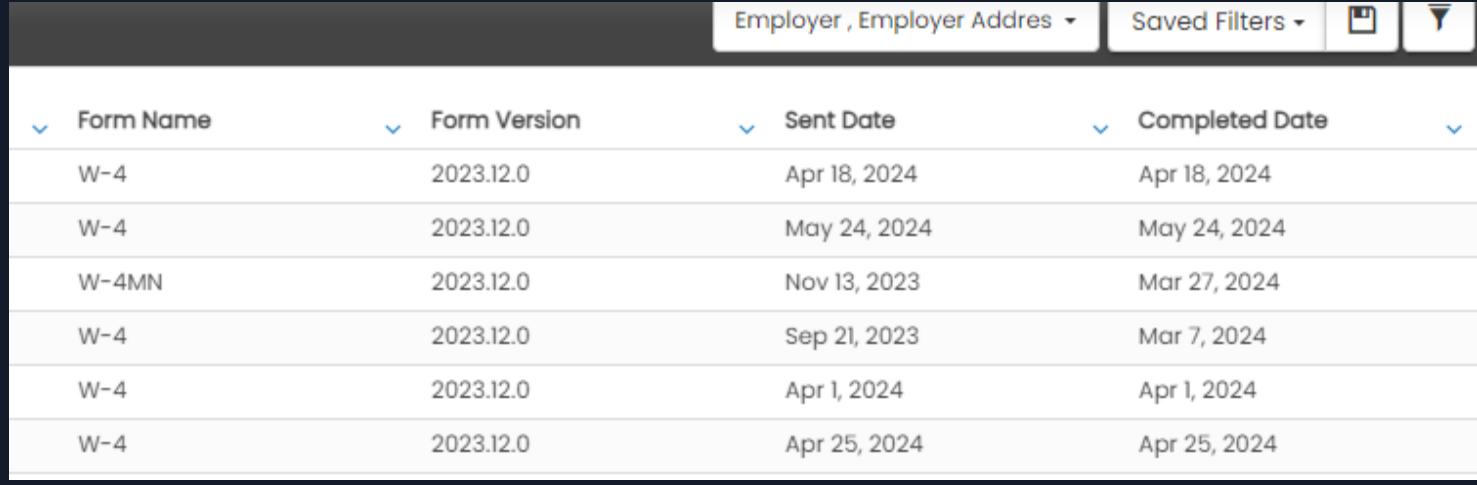
- Avionté 24/7 Onboarding Workflow Detail
  - Goes into detail as to what is sent, by who, to whom, sent date, completion date, number of tasks complete versus not, and stage information

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 Sodeling	Assigned/Sent	Test Soderling	Test	Soderling	2024-06-05		Yes		Direct Deposit, Educ...	Verify Personal Infor...	
CS Pipeline	Service User	Completed	Test Soderling	Test	Soderling	2024-05-14	2024-05-14	Yes	1		Verify Personal Infor...	2024-05-14
ClareH Onboarding ...	Service User	Completed	Jimmy Jack	Jimmy	Jack	2024-05-09	2024-05-13	Yes	2			
ClareH Onboarding ...	Service User	Completed	Jimmy Jack	Jimmy	Jack	2024-05-13	2024-05-15	Yes	2			
ClareH Onboarding ...	Service User	Completed	Jimmy Jack	Jimmy	Jack	2024-05-16	2024-05-22	Yes	3			
John Stanton Test	jordan cox	Assigned/Sent	test_ zz247test	test_	zz247test	2024-05-06		Yes		Certifications, Perso...	Verify Personal Infor...	
Jamie's Workflow	Service User	Assigned/Sent	Jamie Flores	Jamie	Flores	2024-06-28		Yes		Equifax Workforce S...	Verify Personal Infor...	
Example Workflow	Service User	Completed	Samwise Rayman	Samwise	Rayman	2024-05-24	2024-05-24	Yes	2		Hiring Documents	2024-05-24
Example Workflow	Service User	Completed	Samwise Rayman	Samwise	Rayman	2024-05-24	2024-06-10	Yes	2		Hiring Documents	2024-06-10
DW Automation On...	Service User	Assigned/Sent	Dave Webb	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	Dave Webb	Dave	Webb	2024-05-10	2024-05-10	Yes	1		Verify Personal Infor...	2024-05-10
Jamie's Workflow	Service User	Assigned/Sent	Test Flores	Test	Flores	2024-06-28		Yes		Equifax Workforce S...	Verify Personal Infor...	
jordan test	jordan cox	Assigned/Sent	test_ zzonboardingtes	test_	zzonboardingtest	2024-05-06		Yes	1	Certifications, Direct...		
CS Onboarding	Service User	Assigned/Sent	Ridley Harrison	Ridley	Harrison	2024-05-16		Yes		Direct Deposit, Educ...	Verify Personal Infor...	
Example Workflow	Service User	Assigned/Sent	Alexander Libera	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	Jimmy Jack	1225 Estabrook Drive Saint P...	W4101
Sales	4300 MarketPointe Dr Minne...	454554544	Samwise Rayman	8512 Pillsbury Ave S Bloomin...	W4101
Sales	4300 MarketPointe Dr Minne...	454554544	test Dahms	1270 Eagan Industrial Rd Eag...	MN103
Sales	4300 MarketPointe Dr Minne...	454554544	test Dahms	1270 Eagan Industrial Rd Eag...	W4101
Sales	4300 MarketPointe Dr Minne...	454554544	Test Soderling	4657 Castle Drive Eagan, M...	W4101
Sales	4300 MarketPointe Dr Minne...	454554544	Test Soderling	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

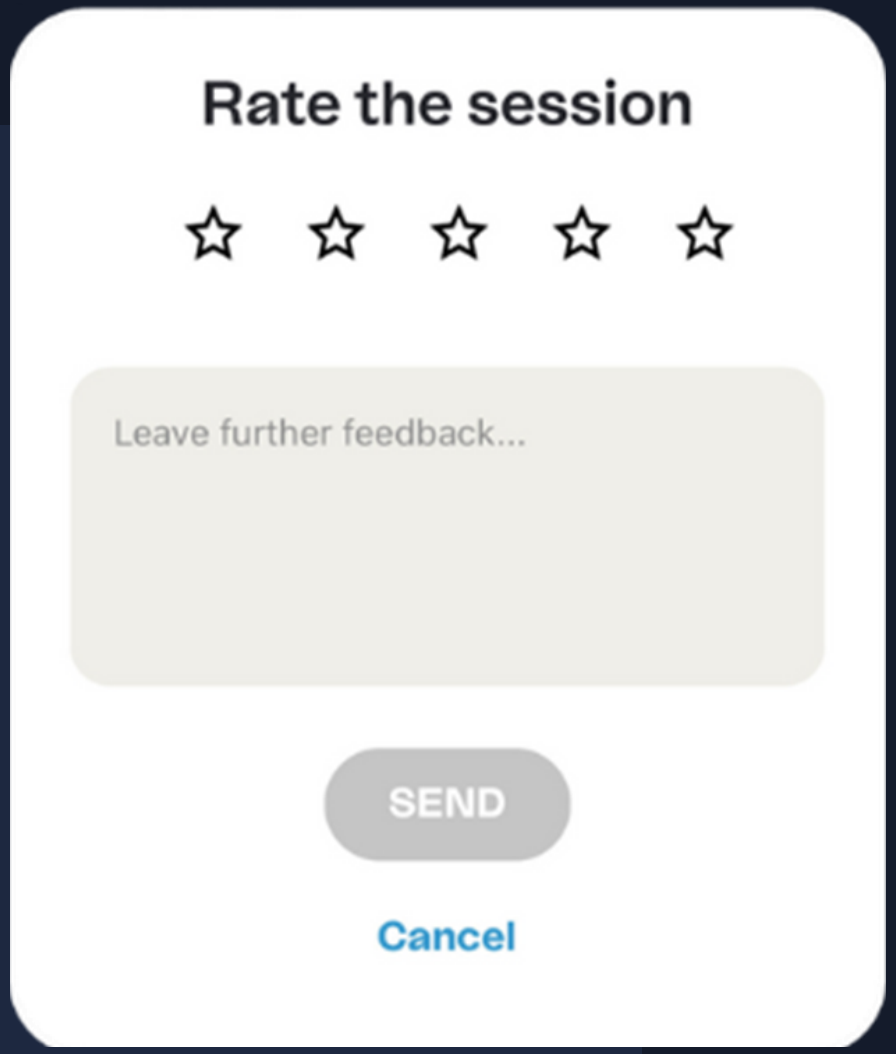
MULTI-LINGUAL

- 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



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