# Heartland

# Onboarding Quick Start Guide

Once you have hired a new employee, you will need to onboard them and send them an onboarding package.  This guide will walk you through the fastest way of getting started.

## Onboard New Employee



1) From the **Onboarding** menu, select Onboarding, and then select **Onboard New Employee**.

2) You can either select an existing template, or you may add documents manually in the section marked "Custom."
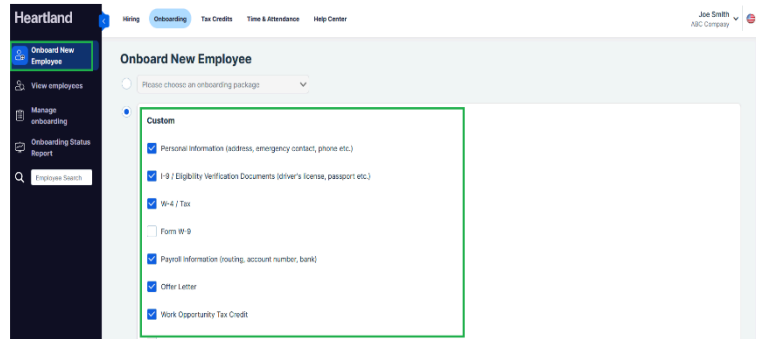
3) Complete the details for the new employee on these pages, selecting **Continue** at each page to proceed to the next.

   Note that the required fields will be different depending on how the account is set up.

4) Select **Send Onboarding Docs**.

   An **Onboarding Docs Sent Successfully** box opens confirming that the onboarding documents have been emailed to the new employee.

5) You can select **View Employees** to see the new hire, or **Onboard New Employee** if you wish to add another one.