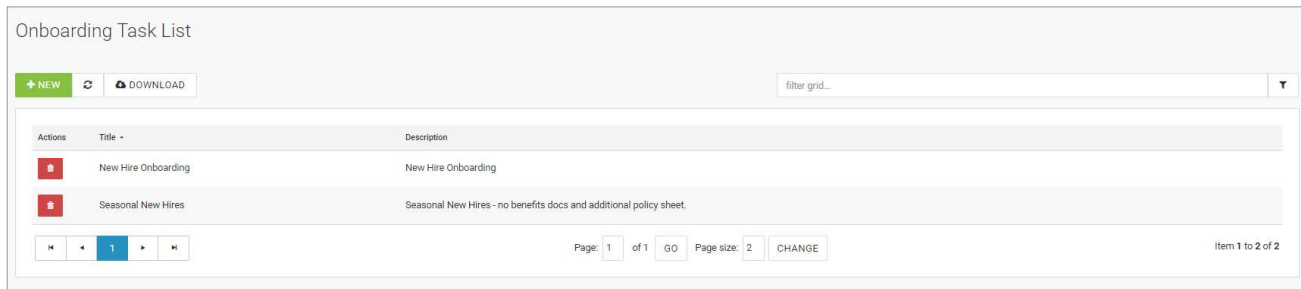


Including Direct Deposit in an Onboarding Task List

When setting up a company's onboarding experience for new hires, you can select any number of company tasks and documents to be used for the onboarding process. You do this on the **HR Admin - Onboarding - Task List** screen.



The screenshot shows the 'Onboarding Task List' interface. At the top, there are buttons for '+ NEW', a refresh icon, and 'DOWNLOAD'. A search bar labeled 'filter grid...' is on the right. Below is a table with columns for 'Actions', 'Title', and 'Description'. Two items are listed: 'New Hire Onboarding' and 'Seasonal New Hires'. At the bottom, there are pagination controls showing 'Page: 1 of 1', 'GO', 'Page size: 2', 'CHANGE', and 'Item 1 to 2 of 2'.

The example below shows how the Admin has specified that Direct Deposit tasks/documents will be presented to the employee during onboarding for download, review, and signature. You do this in the **Steps** section of the screen by setting the **Include Direct Deposits** toggle switch to **Yes**.



The screenshot shows the 'Steps' configuration screen. The heading is 'Steps' and the instruction is 'Mark and setup the sections below that you want included in this onboarding task list.' There are two columns of toggle switches. The first column includes: 'Include Welcome Note', 'Include W4', 'Include Background Check Authorization', 'Include Custom Document Upload', and 'Include Company Documents'. The second column includes: 'Include Direct Deposits' (highlighted with a red box), 'Include I9', 'Include Custom Questions', and 'Include End Note and E-Signature'. Each toggle has 'NO' and 'YES' options. At the bottom, there is a section 'Select/Change Company Documents' with a dropdown menu showing 'Select a document'.