

HR ASSURED™
smarter workplace solutions

Employment Documentation via HRA Cloud

Your guide to issuing employment
contracts & employee handbook using
HRA Cloud

eBook

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1. Understanding the pre-employment checklist

In this guide, we explain how to use the **Pre-employment Documentation** checklist within HRA Cloud. This checklist is a smart, legally compliant onboarding process which will help you to effectively communicate with your candidates and your new and existing employees. Setting tasks and issuing documents is easy and fast – just follow each automated step.

Before you commence the **Pre-employment Documentation** checklist:

- ✓ Your HR compliance audit must first be completed. If you were issued tailored employment contracts and workplace policies (as part of this process), these will be configured into this checklist within your HRA Cloud account.
- ✓ You'll need to have set up your HRA Cloud account (as per the [HR Assured Onboarding & Account Set Up Guide](#)).
- ✓ You'll need to have officially launched HR Assured to your managers and employees (as per the [How to Introduce HR Assured to Your Team Guide](#)).

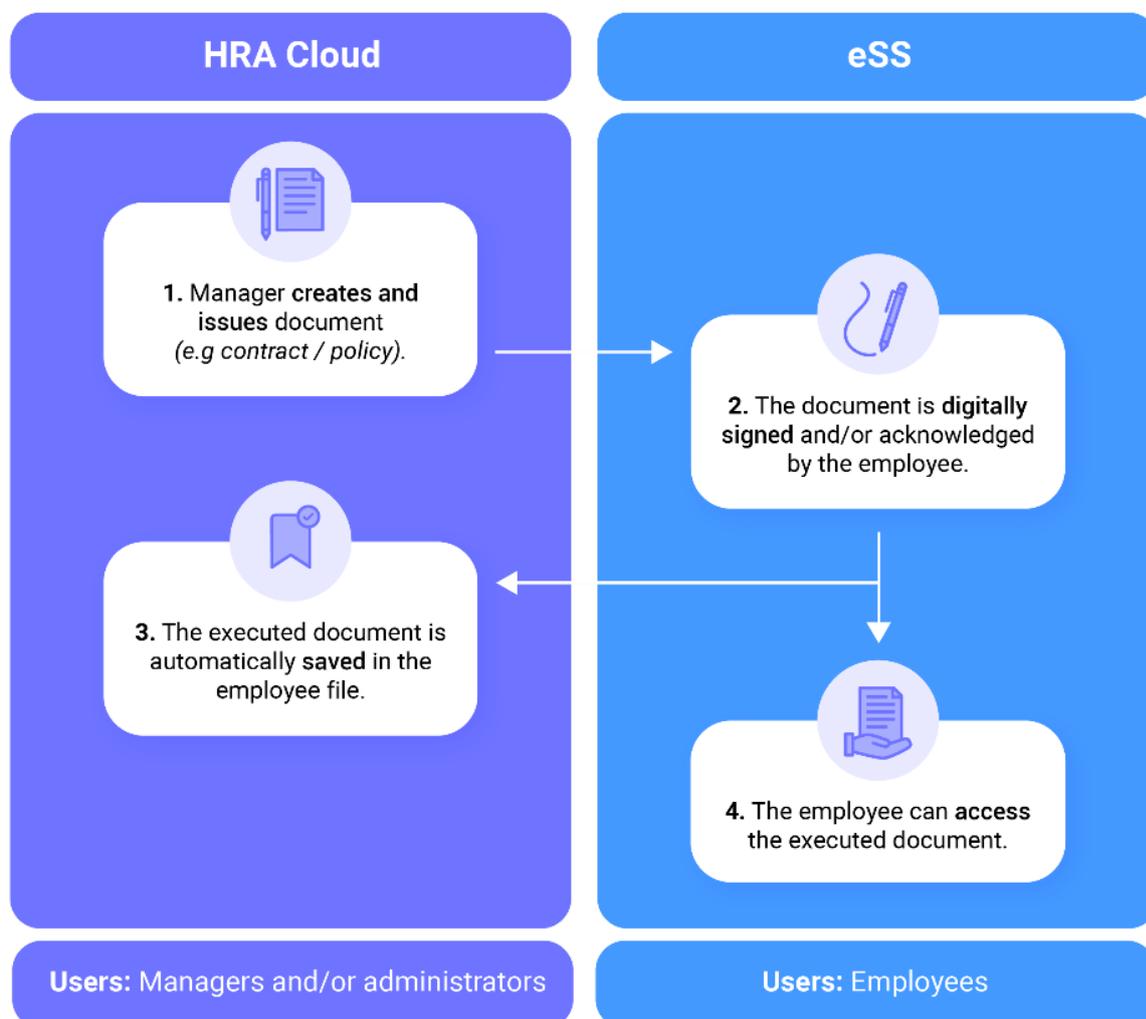
If these have all been completed, read on!

The **Pre-employment Documentation** checklist is powered by HRA Cloud's self-service (eSS) portal which means that all candidates and new staff can complete and execute any tasks or documents allocated to them online. For existing staff, you can use the checklist to send updated documents for signature/acknowledgement. All actions undertaken in eSS are automatically saved against their employee record making it easier for you to ensure all essential documents are returned promptly and your business is protected.



All employment documentation must be issued from the pre-employment checklist for tasks to be completed via eSS – do not issue these documents directly from the employee record. You'll also need to ensure that all candidate and/or employee records have a valid email address stored against their record before launching the checklist.

Here, we explain how documents are issued via HRA Cloud's management portal, signed in eSS by the employee and automatically saved against the record.



1.1. Documents managed

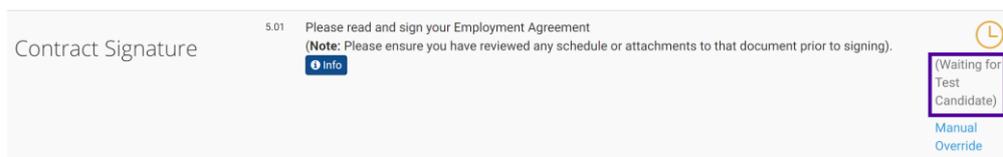
The **Pre-employment Documentation** checklist is used to issue and collect the following executed documents. As you work through each step, the checklist will prompt you as to which documents and tasks need to be issued depending on the nature and type of the candidate's or employee's employment.

 Depending on the customisation of your account, or the different integrations in place, you might see a slightly different list of documents and tasks than those in the list below:

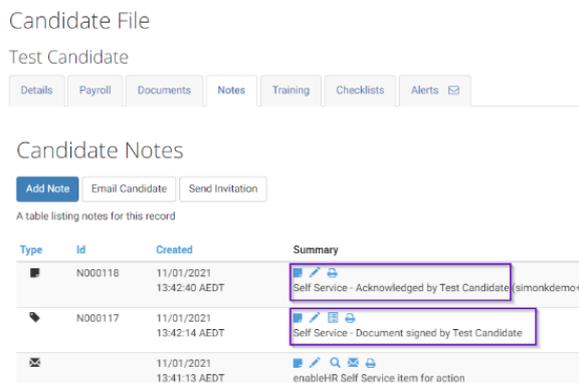
| Document / Task | eSS Action for Candidate / Employee (All actions completed via eSS are automatically stored against their record under the <i>Documents</i> and <i>Notes</i> tab) |
|---|--|
| Employment Contract | Electronic eSS signature |
| Annualised Salary Agreement (if applicable) | Electronic eSS signature |
| Employee Handbook | Electronic eSS acknowledgement |
| Bank Account Details Form | Upload via eSS |
| Superannuation Choice Form | Upload via eSS |
| Tax File Number (TFN) Declaration | Upload via eSS |
| Fair Work Information Statement | Electronic eSS acknowledgement |
| Casual Conversion Clause (if applicable) | Electronic eSS acknowledgement |
| Citizenship/Visa Documentation | Upload via eSS |
| Drivers Licence | Upload via eSS |
| Criminal Record Checks (New Zealand HRA Cloud accounts only) | Upload via eSS |

1.2. Progress tracking

All the actions completed in both core HRA Cloud and eSS will be automatically tracked against the candidate's or employee's checklist and their record. The checklist will indicate which steps have been completed and which steps are still waiting on action from the employee. For example, if the employment contract is pending for signature in eSS, the step will indicate the status as follows:



Once an action is complete, this will be tracked under the **Documents** and/or **Notes** tab in the record as follows:



| Type | Id | Created | Summary |
|---|---------|-----------------------------|--|
|  | N000118 | 11/01/2021 13:42:40 AEDT | Self Service - Acknowledged by Test Candidate (simonkdemo+2) |
|  | N000117 | 11/01/2021 13:42:14 AEDT | Self Service - Document signed by Test Candidate |
|  | | 11/01/2021 13:41:13 AEDT | enableHR Self Service Item for action |

2. Utilising the pre-employment checklist

Do not start using this checklist until your HRA Cloud account has been set up (as per the [HR Assured Onboarding & Account Set Up Guide](#)) and HR Assured has been officially launched to your managers and employees (as per the [How to Introduce HR Assured to Your Team Guide](#)).

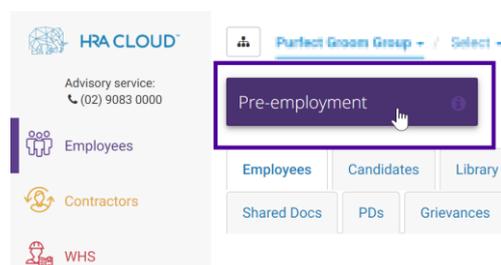
WATCH THIS VIDEO: [How to issue employment documentation using HRA Cloud](#)

2.1. How to begin using the pre-employment checklist

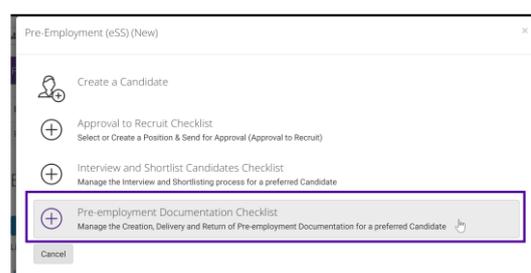
1. Go to the **Employee Management** module.



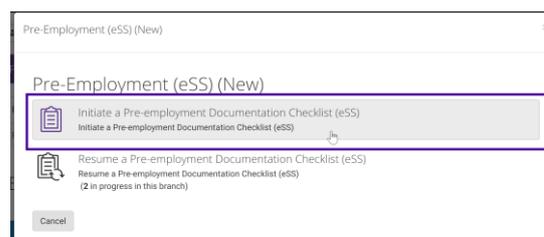
2. Click on the **Pre-employment** button.



3. Select the **Pre-employment Documentation** checklist from the pop-up window.



4. Select **Initiate/Commence** if you need to create a new checklist. Select **Resume** if you need to complete a checklist you've already started.



5. Select the **candidate** or **employee** record you need to issue documentation to. This will launch the checklist against the relevant record.

TIP: Use the **Search** field and filters to search and locate the relevant record. If the record has not yet been created, click **Add candidate** or **Add employee**.

6. Once you have completed the steps above, you will be prompted to complete each step in the checklist. As you work through each step, the checklist will prompt you as to which documents and tasks need to be issued depending on the nature and type of the candidate's or employee's employment.

If you need further context or information on how to complete a step, please click on the **Info** button and a pop-up message will appear.

To complete each step, click on the buttons down the right-hand side of the checklist steps.

| Checklist Item | Description | Completed? |
|----------------------|---|---------------|
| Candidate Successful | 1.01 Notify the candidate of their successful application and of the expected next steps via eSS | Send Email... |
| Create the Agreement | 2.01 Create a Letter of Offer and Individual Employment Agreement for the candidate Important: Ensure you include the relevant Position Description as Schedule 2 of the Employment Agreement | Create... |



Some steps are compulsory (for legal reasons) where you'll not be permitted to move to the next step until the compulsory step is completed. Other steps will be optional and can be skipped.

The final steps within the checklist will prompt you to complete and close the checklist. We recommend you complete all steps.



While working through the checklist, remember that you can call to seek advice from the **Telephone Advisory Services** team to assist you in the process of issuing employment documentation.

2.2. How to issue an employment contract for electronic signature via eSS

1. As per the above instructions, work through all steps in the pre-employment documentation checklist.
2. At **Step 3.01** (for Australian HRA Cloud accounts) and **Step 2.01** (for New Zealand HRA Cloud accounts), click **Create** to generate the employment contract to be electronically signed in eSS. Select the relevant **Contract Template** you need to create.

Create the Contract 3.01 Create a Letter of Offer and Employment Contract for the candidate. [Info](#) Create...

+ Create a document to be signed in Self Service

Australian templates:

Select the Template

You are about to create an **Employment Contract** from a template.

Create the document using the selected template:

Please select a template...

- Employment Agreement - Casual - Award Covered
- Employment Agreement - Casual - Non Award
- Employment Agreement - Full Time - Award Covered
- Employment Agreement - Full Time - Award Covered - Maximum Term
- Employment Agreement - Full Time - Non Award Covered
- Employment Agreement - Full Time - Non Award Covered - Maximum Term
- Employment Agreement - Part Time - Award Covered
- Employment Agreement - Part Time - Award Covered - Maximum Term
- Employment Agreement - Part Time - Non Award - Maximum Term
- Employment Agreement - Part Time - Non Award Covered

New Zealand templates:

Select the Template

You are about to create an **Employment Contract** from a template.

Create the document using the selected template:

Please select a template...

- Employment Agreement - Casual (e)
- Employment Agreement - Casual (e)
- Employment Agreement - Full Time Fixed Term (e)
- Employment Agreement - Part Time Fixed Term (e)
- Employment Agreement - Permanent Full Time (e)
- Employment Agreement - Permanent Part Time (e)



If you were issued tailored contracts as part of your HR compliance audit, you should be able to select these at this step. Contact **Client Success** at support@hrassured.com if you cannot see them as they may need to be configured into your account.

3. Once you have selected the template, you will be presented with a question-and-answer process where your answers will tailor the template contract to align with the details of the candidate or employee and their unique circumstances.

4. Once you've completed all the answers, you can review the questions and answers, and amend them as required, by clicking on the **Edit** button.

5. You can **Preview** the document, if required. Otherwise, click on the **Create** or **Next** button to create the document.

6. You can then resume the checklist by clicking on the **Next** button.

7. At **Step 4.01** (for Australian HRA Cloud accounts) and **Step 3.01** (for New Zealand HRA Cloud accounts), click **Go** to issue the employment contract to the candidate or employee via eSS for electronic signature.

8. Refer to the [Employees' Jumpstart Guide](#) for detail on how the contract is electronically signed via eSS. The electronic signature is automatically embedded in the employment contract and is automatically stored against the candidate or employee record.

2.3. How to issue employee handbook for electronic acknowledgement via eSS

1. As per the above instructions, work through all steps in the pre-employment documentation checklist.
2. At **Step 7.01**, click **Go** to send your Employee Handbook to be electronically acknowledged in eSS.

Employee Handbook

7.01 Click 'Go' if you would like to send a copy of your Employee Handbook to the candidate via eSS.

TIP: In the next step you will need to select the Employee Handbook from the 'Policies' tab before a task will be sent to the candidate. If you haven't yet loaded your Employee Handbook to the Policies tab you can also complete that action at the same time.

Go...

3. At **Step 8.01**, you will need to select the document that should be sent to eSS for electronic acknowledgement. If you haven't yet loaded your Employee Handbook into **Policies** tab, you can complete this action at the same time.

Employee Handbook Acknowledgement

8.01 Please confirm you have read the company Employee Handbook and that you acknowledge and agree that you are bound by the contents of the Employee Handbook.

Select...

Select Document

Policies

Policies

Search

this branch only and its sub-branches

Upload a new document Create a new Policy Download documents

| <input type="checkbox"/> | Type | Name | Updated | Status | Expiry | Author | Size | View | Download |
|--------------------------|--------|---|------------|----------|--------|---------|-----------|------|----------|
| <input type="checkbox"/> | Policy | Policy - Workplace Surveillance | 20/11/2020 | Complete | | jyodemo | 78.88 KB | View | Download |
| <input type="checkbox"/> | Policy | Policy - Working from Home | 20/10/2020 | Created | | jyodemo | 95.73 KB | View | Download |
| <input type="checkbox"/> | Policy | Employee Handbook | 25/03/2020 | Draft | | jyodemo | | Edit | |
| <input type="checkbox"/> | Policy | Policy - Travel | 16/03/2020 | Created | | jyodemo | 79.67 KB | View | Download |
| <input type="checkbox"/> | Policy | Employee Handbook | 14/10/2019 | Complete | | jyodemo | 529.23 KB | View | Download |
| <input type="checkbox"/> | Policy | Company data protection policy | 14/10/2019 | Complete | | jyodemo | 36.09 KB | View | Download |
| <input type="checkbox"/> | Policy | Employee Code of Conduct Policy | 14/10/2019 | Complete | | jyodemo | 36.52 KB | View | Download |
| <input type="checkbox"/> | Policy | Human Resources Policy and Procedure Manual | 14/10/2019 | Complete | | jyodemo | 321.65 KB | View | Download |

9. Refer to the [Employees' Jumpstart Guide](#) for details on how the employee handbook is electronically acknowledged via eSS. The date and time the candidate or employee acknowledged the handbook is automatically tracked against their record under the **Notes** tab.

2.4. How to issue other important documentation for completion via eSS

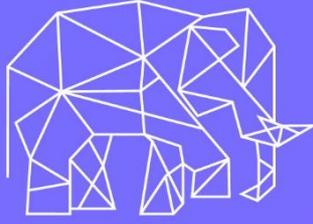
1. As per the above instructions, work through all steps in the pre-employment documentation checklist.
2. Various steps will prompt you to issue other important documentation which includes (but not limited to):
 - a. **New Starter Documentation** – these steps will issue forms to the candidate to complete and upload via eSS. Forms include bank account details form, superannuation / KiwiSaver form, tax file number/code declaration form plus other important documents such as annualised salary agreement and casual conversion clause form (for Australian HRA Cloud accounts only);
 - b. **Citizenship / Visa Documentation** – these steps will prompt the candidate or employee to upload a copy of their citizenship or visa documents;
 - c. **Drivers License** – these steps will prompt the candidate or employee to upload a copy of their Driver's License;
 - d. **Criminal Record Checks** (for New Zealand HRA Cloud accounts only) – these steps will prompt the candidate or employee to self declare or provide authority for a criminal history check.
3. Refer to the [Employees' Jumpstart Guide](#) for details on how the employee can complete and return these required documents via eSS. All actions completed via eSS are automatically stored against their record under the **Documents** and **Notes** tab.

2.5. How to complete the pre-employment checklist

1. Complete all steps within the checklist as required.
2. For existing employees, you can complete the checklist at **Step 24.06** once all the relevant steps are completed.
3. For candidates, you can complete the checklist at **Step 24.03** once all the relevant steps are completed. This will convert the candidate record into an employee record. All data, documents and notes tracked against the candidate record will also be stored against the employee record.



You will not be able to complete the checklist until all the necessary steps have been completed first. Remember that some steps are compulsory (for legal reasons). Other steps are optional and can be skipped.



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