



# BerniePortal How To: *Onboard a New Employee*

**Follow the steps below for instructions on how to onboard a new employee.**

- Step 1:** Log in to your BerniePortal employer account.
- Step 2:** Select “Employees” from the black bar at the top of the home page.
- Step 3:** Click the blue “Add” button toward the top right-hand side of the page.
- Step 4:** Select “Onboard/New Hire.”
- Step 5:** Under “Login”, select *No* when asked if you have an email address for the new hire.
- Step 6:** Under “Info”, enter the employee’s *First & Last Name* and *Hire Date*.
- Step 7:** Under “Payroll”, complete all required sections.
- Step 8:** Under “Subgroups”, select the appropriate *Benefits* subgroup. Then click through all other categories to ensure the appropriate subgroups are selected.  
*Most new hires will be put in the “Employee” subgroup. Do not choose the waiver subgroup.*
- Step 9:** Under “Documents”, select *None* for each document type.  
*BerniePortal offers the option to have new employees complete their I9 and W-4 electronically. If you would like to utilize this feature, please leave those documents turned on.*
- Step 10:** Click “Submit & Send” to complete the onboarding process.  
*Once submitted, you can download an instructional PDF for the employee by hovering over the “action gear” next to the employee’s name and selecting “redownload PDF.”*