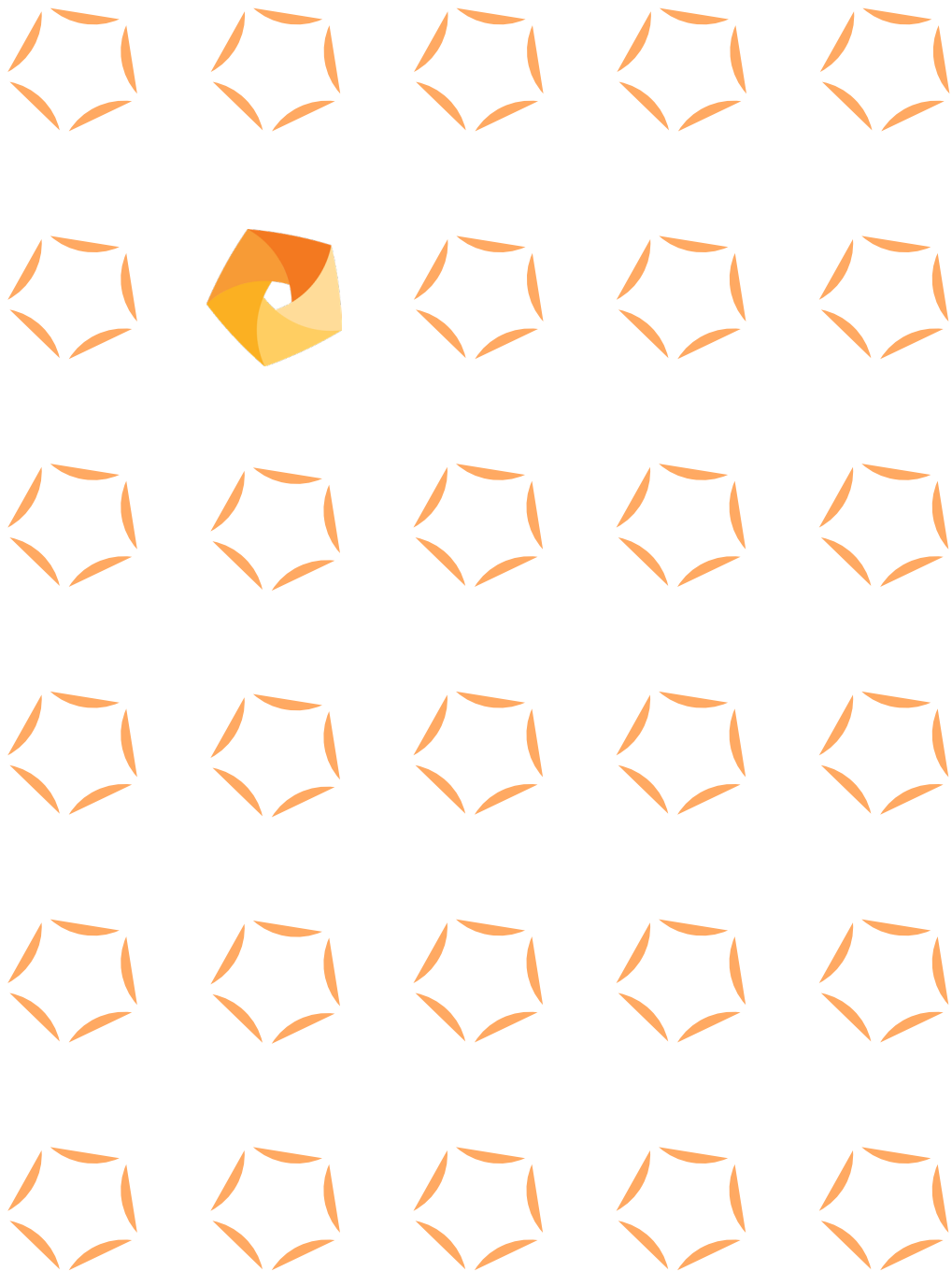


# How to Use the Employee Management Hub in Aprio Connect

FOLLOW THESE STEPS TO KEEP TRACK OF THE ONBOARDING PROCESS, ADD OR REMOVE TASKS IN BULK, AND VIEW AND DOWNLOAD COMPLETED ONBOARDING DOCUMENTS IN APRIO CONNECT



# Topics

This instructional presentation covers the two topics below. To skip ahead, click the button.



How to keep track of the onboarding process

How to add and remove tasks in bulk

How to view and download  
completed onboarding documents



# How to keep track of the onboarding process

# Keeping track of the onboarding process



From the dashboard, select **Employee Management**.

The screenshot shows the Aprio web application interface. On the left is a sidebar with the Aprio logo and three menu items: "Admin" (with a gear icon), "Employee Management" (with a grid icon and highlighted by an orange rectangle), and "I9 Management" (with a grid icon). At the bottom of the sidebar is a user profile for "MATTHEW CLARK" with a green circular avatar containing the letter "M". The main content area has a dark brown header with a back arrow, a globe icon, and a user icon. Below the header is a navigation bar with tabs: "Companies" (selected), "Entities", "Locations", "Users", and "Employees". A search bar with the placeholder "Search" and "Name" is on the right. Below the tabs is a table with columns: "Name", "Owner Name", "Payroll Processor", "Location States", "Industry", and "Date Added". The table contains one row for "APRIO DEMO CLIENT" with an edit icon, "APRIO CLIENT", "KS, MI, MN, OR", "Food Preparation and Serving Relat...", and "05/07/2026". To the right of the table are controls for "Show inactive companies" (a toggle switch) and "Columns" (a grid icon). At the bottom left of the table area is a "Dense" view toggle (a toggle switch). At the bottom right is pagination information: "Rows per page: 25", "1-1 of 1", and navigation arrows.

Aprio

Admin

Employee Management

I9 Management

MATTHEW CLARK

Companies Entities Locations Users Employees >

Search  
Name

Show inactive companies Columns

| Name              | Owner Name   | Payroll Processor | Location States | Industry                              | Date Added |
|-------------------|--------------|-------------------|-----------------|---------------------------------------|------------|
| APRIO DEMO CLIENT | APRIO CLIENT |                   | KS, MI, MN, OR  | Food Preparation and Serving Relat... | 05/07/2026 |

Dense

Rows per page: 25 1-1 of 1 < >

# Keeping track of the onboarding process



Filter the resulting reports as needed using the report criteria directly above the report results.

Onboarding ManagementPost Onboarding ManagementCommunications

Search

Employee Name

Status 3

Company

Location

Task Status

Task Type

More filters

Download

ColumnsExport

Active filters: Status: ActiveStatus: New HireStatus: HoldClear All

|                          | Name           | Status   | Location             | Company        | Onboarding St... | Date of Birth | Date of Hire | Date of Rehire | Last Notified     | Created By      | Completed | Actions |
|--------------------------|----------------|----------|----------------------|----------------|------------------|---------------|--------------|----------------|-------------------|-----------------|-----------|---------|
| <input type="checkbox"/> | CARTER, AALIYA | Active   | OREGON QUICK C 97301 | APRIO DEMO ... | Completed        | 06/18/1994    | 05/13/2026   |                | 05/17/2026 10:... | CURTIS STEPH... | 2 of 2    |         |
| <input type="checkbox"/> | CARTER, EMILY  | New Hire | KANSAS FLASH F 05213 | APRIO DEMO ... | Not Started      |               | 05/14/2026   |                |                   | ABBYGAIL JOH... | 0 of 1    |         |
| <input type="checkbox"/> | GONZALEZ, MAF  | New Hire | MICHIGAN QUICK 48933 | APRIO DEMO ... | In Progress      | 03/14/1991    | 05/13/2026   |                | 05/18/2026 10:... | CURTIS STEPH... | 1 of 2    |         |
| <input type="checkbox"/> | JACKSON, DARNI | New Hire | MINNESOTA FLAS 55155 | APRIO DEMO ... | In Progress      | 11/05/1985    | 05/13/2026   |                | 05/18/2026 10:... | CURTIS STEPH... | 1 of 2    |         |
| <input type="checkbox"/> | MEMBER, TEAM   | New Hire | MINNESOTA FLAS 55155 | APRIO DEMO ... | Not Started      | 01/01/2010    | 05/08/2026   |                |                   | SARAH MITCH...  | 0 of 2    |         |
| <input type="checkbox"/> | MERCER, MATTE  | New Hire | KANSAS FLASH F 05213 | APRIO DEMO ... | In Progress      | 08/22/1987    | 05/13/2026   |                | 05/18/2026 10:... | CURTIS STEPH... | 1 of 2    |         |
| <input type="checkbox"/> | MILLER, JOHN   | New Hire | MINNESOTA FLAS 55155 | APRIO DEMO ... | Completed        | 12/31/1999    | 05/12/2026   | 05/16/2026     |                   | ABBYGAIL JOH... | 3 of 3    |         |
| <input type="checkbox"/> | MITCHELL, LEN  | New Hire | KANSAS FLASH F 05213 | APRIO DEMO ... | Assigned         | 09/12/1992    | 05/13/2026   |                | 05/18/2026 10:... | CURTIS STEPH... | 0 of 2    |         |
| <input type="checkbox"/> | PARKER, ETHAN  | New Hire | KANSAS FLASH F 05213 | APRIO DEMO ... | In Progress      | 01/27/1990    | 05/13/2026   |                | 05/18/2026 10:... | CURTIS STEPH... | 1 of 2    |         |
| <input type="checkbox"/> | WHITAKER, JANI | Active   | MINNESOTA FLAS 55155 | APRIO DEMO ... | Completed        | 01/01/2000    | 05/08/2026   |                |                   | SARAH MITCH...  | 7 of 7    |         |

☒ Dense

Rows per page: 251-10 of 10

5

# Keeping track of the onboarding process



To see employees who have not completed onboarding, filter the **Task Status** criteria to show **Not Started**, **In Progress**, and **Needs Review**. The report can also be filtered by location, task type, employee status, and more.

The screenshot shows the Aprio onboarding report interface. At the top, there are filters for Task Status (3), Task Type, and a search bar. Below the filters, there are active filter buttons: Status: Active, Status: New Hire, Status: Hold, Task Status: Not Started, Task Status: In Progress, and Task Status: Needs Review. A table lists employees with columns for Name, Status, Location, Company, Onboarding St..., Date of Birth, Date of Hire, Date of Rehire, Last Notified, Created By, Completed, and Actions. The table shows six employees with various onboarding statuses. On the left, a sidebar shows a search bar and filter options: Select All, Not Started, In Progress, Needs Review, and Completed. In the top right corner, there are buttons for Columns and Export. At the bottom right, there are options for Rows per page (25) and a page indicator (1-6 of 6).

Task Status 3 Task Type

Search Employee Name Status 3 Company Location Task Status 3 Task Type More filters Columns Export

Active filters: Status: Active Status: New Hire Status: Hold Task Status: Not Started Task Status: In Progress Task Status: Needs Review Clear All

| <input type="checkbox"/> | Name           | Status   | Location             | Company        | Onboarding St... | Date of Birth | Date of Hire | Date of Rehire | Last Notified     | Created By      | Completed | Actions |
|--------------------------|----------------|----------|----------------------|----------------|------------------|---------------|--------------|----------------|-------------------|-----------------|-----------|---------|
| <input type="checkbox"/> | GONZALEZ, MAF  | New Hire | MICHIGAN QUICK 48933 | APRIO DEMO ... | In Progress      | 03/14/1991    | 05/13/2026   |                | 05/18/2026 10:... | CURTIS STEPH... | 1 of 2    |         |
| <input type="checkbox"/> | JACKSON, DARNI | New Hire | MINNESOTA FLAS 55155 | APRIO DEMO ... | In Progress      | 11/05/1985    | 05/13/2026   |                | 05/18/2026 10:... | CURTIS STEPH... | 1 of 2    |         |
| <input type="checkbox"/> | MEMBER, TEAM   | New Hire | MINNESOTA FLAS 55155 | APRIO DEMO ... | Not Started      | 01/01/2010    | 05/08/2026   |                |                   | SARAH MITCH...  | 0 of 2    |         |
| <input type="checkbox"/> | MERCER, MATTE  | New Hire | KANSAS FLASH F 05213 | APRIO DEMO ... | In Progress      | 08/22/1987    | 05/13/2026   |                | 05/18/2026 10:... | CURTIS STEPH... | 1 of 2    |         |
| <input type="checkbox"/> | MITCHELL, LEN  | New Hire | KANSAS FLASH F 05213 | APRIO DEMO ... | Assigned         | 09/12/1992    | 05/13/2026   |                | 05/18/2026 10:... | CURTIS STEPH... | 0 of 2    |         |
| <input type="checkbox"/> | PARKER, ETHAN  | New Hire | KANSAS FLASH F 05213 | APRIO DEMO ... | In Progress      | 01/27/1990    | 05/13/2026   |                | 05/18/2026 10:... | CURTIS STEPH... | 1 of 2    |         |

Dense Rows per page: 25 1-6 of 6

This report can be exported to Excel by selecting the orange **Export** button in the top right corner.

# Keeping track of the onboarding process



To see the employee's assigned task list, click anywhere on the employee's information to expand the row.

| <input type="checkbox"/> | Name ▲        | Status                     | Location             | Company        | Onboarding St... | Date of Birth | Date of Hire | Date of Rehire | Last Notified     | Created By             | Completed | Actions       |
|--------------------------|---------------|----------------------------|----------------------|----------------|------------------|---------------|--------------|----------------|-------------------|------------------------|-----------|---------------|
| <input type="checkbox"/> | GONZALEZ, MAI | <a href="#">+ New Hire</a> | MICHIGAN QUICK 48933 | APRIO DEMO ... | In Progress      | 03/14/1991    | 05/13/2026   |                | 05/18/2026 10:... | CURTIS STEP...         | 1 of 2    | ⋮             |
|                          |               |                            |                      |                |                  |               |              |                |                   |                        |           |               |
| Task Title               |               |                            | Date Added           |                | Date Completed   |               | Status       |                |                   | Action                 |           |               |
| Form I-9                 |               |                            | 05/13/2026           |                | --/--/----       |               | Needs Review |                |                   | <a href="#">Review</a> |           |               |
|                          |               |                            |                      |                |                  |               |              |                |                   |                        |           | Total Rows: 1 |
| <input type="checkbox"/> | JACKSON, DARN | <a href="#">+ New Hire</a> | MINNESOTA FLAS 55155 | APRIO DEMO ... | In Progress      | 11/05/1985    | 05/13/2026   |                | 05/18/2026 10:... | CURTIS STEP...         | 1 of 2    | ⋮             |
|                          |               |                            |                      |                |                  |               |              |                |                   |                        |           |               |
| Task Title               |               |                            | Date Added           |                | Date Completed   |               | Status       |                |                   | Action                 |           |               |
| Form I-9                 |               |                            | 05/13/2026           |                | --/--/----       |               | Needs Review |                |                   | <a href="#">Review</a> |           |               |
|                          |               |                            |                      |                |                  |               |              |                |                   |                        |           | Total Rows: 1 |
| <input type="checkbox"/> | MEMBER, TEAM  | <a href="#">+ New Hire</a> | MINNESOTA FLAS 55155 | APRIO DEMO ... | Not Started      | 01/01/2010    | 05/08/2026   |                |                   | SARAH MITCH...         | 0 of 2    | ⋮             |
|                          |               |                            |                      |                |                  |               |              |                |                   |                        |           |               |
| Task Title               |               |                            | Date Added           |                | Date Completed   |               | Status       |                |                   | Action                 |           |               |
| Minor Work Permit        |               |                            |                      |                | --/--/----       |               | Not Started  |                |                   |                        |           |               |
|                          |               |                            |                      |                |                  |               |              |                |                   |                        |           | Total Rows: 1 |

# Keeping track of the onboarding process



To manually send an onboarding reminder notification, select the three action dots and choose **Send Onboarding Reminder**.

Search

Employee Name

Status 3

Company

Location

Task Status 3

Task Type

More filters

Columns

Export

Active filters: Status: Active Status: New Hire Status: Hold Task Status: Not Started Task Status: In Progress Task Status: Needs Review Clear All

|                          | Name           | Status   | Location             | Company        | Onboarding St... | Date of Birth | Date of Hire | Date of Rehire | Last Notified     | Created By      | Completed | Actions                         |
|--------------------------|----------------|----------|----------------------|----------------|------------------|---------------|--------------|----------------|-------------------|-----------------|-----------|---------------------------------|
| <input type="checkbox"/> | GONZALEZ, MAF  | New Hire | MICHIGAN QUICK 48933 | APRIO DEMO ... | In Progress      | 03/14/1991    | 05/13/2026   |                | 05/18/2026 10:... | CURTIS STEPH... | 1 of 2    |                                 |
| <input type="checkbox"/> | JACKSON, DARNI | New Hire | MINNESOTA FLAS 55155 | APRIO DEMO ... | In Progress      | 11/05/1985    | 05/13/2026   |                | 05/18/2026 10:... | CU              |           | Send Onboarding Welcome Message |
| <input type="checkbox"/> | MEMBER, TEAM   | New Hire | MINNESOTA FLAS 55155 | APRIO DEMO ... | Not Started      | 01/01/2010    | 05/08/2026   |                |                   | SA              |           | Send Onboarding Reminder        |
| <input type="checkbox"/> | MERCER, MATTE  | New Hire | KANSAS FLASH F 05213 | APRIO DEMO ... | In Progress      | 08/22/1987    | 05/13/2026   |                | 05/18/2026 10:... | CURTIS STEPH... | 1 of 2    |                                 |
| <input type="checkbox"/> | MITCHELL, LEN  | New Hire | KANSAS FLASH F 05213 | APRIO DEMO ... | Assigned         | 09/12/1992    | 05/13/2026   |                | 05/18/2026 10:... | CURTIS STEPH... | 0 of 2    |                                 |
| <input type="checkbox"/> | PARKER, ETHAN  | New Hire | KANSAS FLASH F 05213 | APRIO DEMO ... | In Progress      | 01/27/1990    | 05/13/2026   |                | 05/18/2026 10:... | CURTIS STEPH... | 1 of 2    |                                 |

Dense

Rows per page: 25 1-6 of 6

Onboarding reminders are also sent automatically to employees who have not completed their task list.



# How to add and remove tasks in bulk

# How to add and remove tasks in bulk



Tasks can only be added to or removed from employees in **Not Started** and **In Progress** task statuses.

Use the checkmark to mark the employees you wish to add or remove from a task. Select **Manage Tasks** or **Assign Template**.

3 employees selected

Clear Selection

Update Status

Manage Tasks

Assign Template

|                                     | Name           | Status   | Location             | Company        | Onboarding St... | Date of Birth | Date of Hire | Date of Rehire | Last Notified     | Created By      | Completed | Actions |
|-------------------------------------|----------------|----------|----------------------|----------------|------------------|---------------|--------------|----------------|-------------------|-----------------|-----------|---------|
| <input checked="" type="checkbox"/> | GONZALEZ, MAF  | New Hire | MICHIGAN QUICK 48933 | APRIO DEMO ... | In Progress      | 03/14/1991    | 05/13/2026   |                | 05/18/2026 10:... | CURTIS STEPH... | 1 of 2    |         |
| <input checked="" type="checkbox"/> | JACKSON, DARNI | New Hire | MINNESOTA FLAS 55155 | APRIO DEMO ... | In Progress      | 11/05/1985    | 05/13/2026   |                | 05/18/2026 10:... | CURTIS STEPH... | 1 of 2    |         |
| <input checked="" type="checkbox"/> | MEMBER, TEAM   | New Hire | MINNESOTA FLAS 55155 | APRIO DEMO ... | Not Started      | 01/01/2010    | 05/08/2026   |                |                   | SARAH MITCH...  | 0 of 2    |         |
| <input type="checkbox"/>            | MERCER, MATTE  | New Hire | KANSAS FLASH F 05213 | APRIO DEMO ... | In Progress      | 08/22/1987    | 05/13/2026   |                | 05/18/2026 10:... | CURTIS STEPH... | 1 of 2    |         |
| <input type="checkbox"/>            | MITCHELL, LEN  | New Hire | KANSAS FLASH F 05213 | APRIO DEMO ... | Assigned         | 09/12/1992    | 05/13/2026   |                | 05/18/2026 10:... | CURTIS STEPH... | 0 of 2    |         |
| <input type="checkbox"/>            | PARKER, ETHAN  | New Hire | KANSAS FLASH F 05213 | APRIO DEMO ... | In Progress      | 01/27/1990    | 05/13/2026   |                | 05/18/2026 10:... | CURTIS STEPH... | 1 of 2    |         |

# How to add and remove tasks in bulk



**Manage Tasks** lets you to add or remove a single task.

| Manage Tasks                                                                                                                                    | ×                   | Manage Tasks                                                                                                                                    | ×                      |
|-------------------------------------------------------------------------------------------------------------------------------------------------|---------------------|-------------------------------------------------------------------------------------------------------------------------------------------------|------------------------|
| Add or remove tasks for 3 selected employee(s).                                                                                                 |                     | Add or remove tasks for 3 selected employee(s).                                                                                                 |                        |
| <div>Action</div> <div>Add Task</div>                                                                                                           |                     | <div>Action</div> <div>Remove Task</div>                                                                                                        |                        |
| <div>Select Task</div> <div>Minor Work Permit</div>                                                                                             |                     | <div>Select Task</div> <div>Custom Form</div>                                                                                                   |                        |
| <div><b>Selected Employees</b></div> <ul style="list-style-type: none"><li>MARIA GONZALEZ</li><li>DARNELL JACKSON</li><li>TEAM MEMBER</li></ul> |                     | <div><b>Selected Employees</b></div> <ul style="list-style-type: none"><li>MARIA GONZALEZ</li><li>DARNELL JACKSON</li><li>TEAM MEMBER</li></ul> |                        |
| <div>Cancel</div>                                                                                                                               | <div>Add Task</div> | <div>Cancel</div>                                                                                                                               | <div>Remove Task</div> |

Select **Add Task** or **Remove Task** to complete the process. The employee will be notified of the change.

# How to add and remove tasks in bulk



**Assign Template** lets you assign a task template to one or more employees. An onboarding template is configured in the company profile and typically includes multiple tasks. Refer to the **Aprio Connect – How to Create a Template** user guide to learn more about setting up a template.

**Assign Template** ×

Assign a template for 3 selected employee(s).

Select Template

New Hire Onboarding ▼

☐ Send Onboarding Notification

**Selected Employees**

- MARIA GONZALEZ
- DARNELL JACKSON
- MATTEO MERCER

Cancel

Assign Template

Choose **Send Onboarding Notification** to notify the employee of the update. Select **Assign Template** to complete the process.



# How to view and download completed onboarding documents

# How to view and download completed onboarding documents



Expand the employee's row to view the task list. Select **View Details** to see the completed task.

Search

Employee Name

Status 3

Company

Location

Task Status 1

Task Type

More filters

Active filters:

Status: Active

Status: New Hire

Status: Hold

Task Status: Completed

Clear All

| <input type="checkbox"/> | Name            | Status | Location             | Company        | Onboarding St... | Date of Birth | Date of Hire | Date of Rehire | La                    |
|--------------------------|-----------------|--------|----------------------|----------------|------------------|---------------|--------------|----------------|-----------------------|
| <input type="checkbox"/> | WHITAKER, JANII | Active | MINNESOTA FLAS 55155 | APRIO DEMO ... | Completed        | 01/01/2000    | 05/08/2026   |                | SARAH MITCH... 7 of 7 |

| Task Title        | Date Added | Date Completed | Status    | Action       |
|-------------------|------------|----------------|-----------|--------------|
| Custom Form       | 05/07/2026 | 05/07/2026     | Completed | View Details |
| Employee Pay Form | 05/07/2026 | 05/07/2026     | Completed | View Details |
| WOTC Intake Form  | 05/07/2026 | 05/07/2026     | Completed | View Details |
| Federal W-4       | 05/07/2026 | 05/07/2026     | Completed | View Details |
| State W4          | 05/07/2026 | 05/07/2026     | Completed | View Details |
| Form I-9          | 05/07/2026 | 05/07/2026     | Completed | View Details |

Total Rows: 6

Review

Task Overview

Status: Completed  
Task Title: Custom Form  
Task Added Date: 05/07/2026 11:40 pm  
Task Completed Date: 05/07/2026 11:42 pm

Custom Form

Custom Form

Which of the following shifts are you available to work? \*

☒ Check All

☒ 6:00 AM-10:00 AM

☒ 10:00 AM-2:00 PM

☒ 2:00 PM-6:00 PM

☒ 6:00 PM-10:00 PM

Please select all that apply.

Please select your shirt size.

M

T-Shirt Size

Signature \*

☒ I have read and understand the information above, and I agree to sign this document electronically.

Confirm Signature \*

The confirmation signature must match the typed signature in the first step.

Signature

# How to view and download completed onboarding documents



To download documents, click the employee's name to open their profile.

Search

Employee Name

Status 3

Company

Location

Task Status 1

Task Type

More filters

ColumnsExport

Active filters: Status: ActiveStatus: New HireStatus: HoldTask Status: CompletedClear All

| <input type="checkbox"/> | Name             | Status   | Location          | Company        | Onboarding St... | Date of Birth | Date of Hire | Date of Rehire | Last Notified    | Created By     | Completed | Actions |
|--------------------------|------------------|----------|-------------------|----------------|------------------|---------------|--------------|----------------|------------------|----------------|-----------|---------|
| <input type="checkbox"/> | WHITAKER, JANICE | Active   | MINNESOTA FLA...  | APRIO DEMO ... | Completed        | 01/01/2000    | 05/08/2026   |                |                  | SARAH MITC...  | 7 of 7    |         |
| <input type="checkbox"/> | MILLER, JOHN     | New Hire | MINNESOTA FLA...  | APRIO DEMO ... | Completed        | 12/31/1999    | 05/12/2026   | 05/16/2026     |                  | ABBYGAIL JO... | 3 of 3    |         |
| <input type="checkbox"/> | CARTER, AALIYA   | Active   | OREGON QUICK C... | APRIO DEMO ... | Completed        | 06/18/1994    | 05/13/2026   |                | 05/17/2026 10... | CURTIS STEP... | 2 of 2    |         |

Select the Documents tab, then click the blue download button to download the completed document.

Edit Employee JANICE WHITAKER

View History

Employee InformationOnboardingPost OnboardingDocumentsCommunications

Add Document

SearchDocument Name

Columns

| Document Name                       | Document Type       | Date Added | Source                            | Added By                       |  |
|-------------------------------------|---------------------|------------|-----------------------------------|--------------------------------|--|
| 2025-state-w4s/minnesota.pdf        | State W4 Document   | 05/07/2026 | Onboarding Task: State W4         | cristy.singleton+tm@aprio.com  |  |
| 2026-federal-w4.pdf                 | Federal W4 Document | 05/07/2026 | Onboarding Task: Federal W-4      | cristy.singleton+tm@aprio.com  |  |
| form-i9.pdf                         | I9 Document         | 05/07/2026 | Onboarding Task: Form I-9         | cristy.singleton+adm@aprio.com |  |
| individual-characteristics-form.pdf | WOTC Document       | 05/07/2026 | Onboarding Task: WOTC Intake Form | cristy.singleton+tm@aprio.com  |  |
| wotc-8850.pdf                       | WOTC Document       | 05/07/2026 | Onboarding Task: WOTC Intake Form | cristy.singleton+tm@aprio.com  |  |