

Sage HRMS HR Actions Dynamic Forms Checklist by Delphia Consulting



Streamline the onboarding process through a guided online checklist of forms designed to make the routine completion of required forms easy for employees. Sage HRMS HR Actions Dynamic Forms Checklist by Delphia Consulting, a Sage Endorsed Solution, lets you easily create specific forms that must be completed by each employee that will dynamically appear within Sage Employee Self Service (ESS).

With Sage HRMS HR Actions Dynamic Forms Checklist, human resources can create lists of forms that are displayed to the right employee, at the right time, automatically in Sage Employee Self Service. The employees and their managers can see the status of each form in the list. This makes it easy for each employee to fill out the right forms, at the right time, without having to manually select them from all the forms available in Sage HRMS HR Actions.

By streamlining and simplifying these processes, human resources can improve how they communicate required actions to employees and provide them with a more user-friendly and reliable approach to onboarding requirements, annual performance reviews, or other recurring forms.

Sample list of forms

List name:	Onboarding	Performance appraisal	New policy
Visibility criteria:	Based on hire date	Based on review date	When available
Forms:	Data confirmation I-9 (Sage HRMS HR Actions I-9) Federal W-4 (Sage HRMS HR Actions W-4) State W-4 (Sage HRMS HR Actions W-4) Unlimited number of forms	Annual appraisal Goals work plan	Policy acknowledgment

About Sage HRMS HR Actions

Sage HRMS HR Actions by Delphia Consulting, a Sage Endorsed solution, is the web-based workflow solution to automate employee status change forms. Design, initiate, and route forms for approval that automatically update Sage HRMS.

About Sage Employee Self Service

Sage Employee Self Service provides a central location for employees, managers, and administrators to view and manage important personal data and company information. Instead of calling the human resources department with routine inquiries, employees and managers will be more self-sufficient when they can access information directly.

Benefits

- Improved user experience for employees**

Presenting each employee with a list of the right forms at the right time, makes it easier to complete what's expected. The status indicator on each form in the list makes it easy to know what's left to be done.

- Improved visibility and tracking for managers**

Managers view lists of forms required by their direct reports along with the status so they can track progress through to completion.

- Easier expectation setting**

Since each employee automatically views only the lists they must complete, it's clear what's expected of them.

- More efficient list management by HR**

HR staff only has to define the lists once. Sage HRMS HR Actions uses the criteria on each list to determine if and when it should be displayed to the employee in Sage Employee Self Service. If HR updates a list, the new list will automatically be used going forward.

For more info, visit: SageHRMS.com or contact us at 866-271-6050