

Onboarding — The Two Hardest Handoffs, Tracked

Client migration with derived readiness, and WSE paperwork captured once at the source.

Onboarding covers the two hardest handoffs in the PEO business: bringing a whole company onto the platform without losing a cent of payroll history, and bringing each worksite employee on with their paperwork captured once, at the source. Both are tracked, derived workflows — not a binder of tasks.

1 Client onboarding — signed to first live payroll

Stage	What the platform does
Intake	Structured client intake capturing the company, EINs, states, and pay calendar; corporate families onboard as a group, with controlled-group relationships declared up front so ALE status and aggregation are right from day one.
Census migration	Import the workforce and history from the prior provider — ADP, BambooHR, and PrismHR connectors plus generic CSV — with takeover year-to-date brought in additively , so tax caps and wage bases are correct on a mid-year cutover.
Derived readiness	Go-live readiness is computed from what's actually complete (EINs, tax registrations, banking, census, benefits) — a live per-client readiness score, not a manual checkbox.
Go-live	First payroll runs on the same engine that priced the quote; the shadow trial validates it in parallel before cutover.

2 WSE onboarding — captured once, at the source

Step	Detail
Invite & identity	A roster invite mints the employee's login and relinks their profile, dropping them into a guided, step-tracked onboarding flow (complete-step by complete-step).
I-9 & E-Verify	Section 1 / Section 2 capture with AI document extraction , reverification and Section-2 sweeps, and expiry tracking; E-Verify submission is built to the USCIS spec (activates on DHS Designated-Agent registration).
W-4 & direct deposit	The 2020+ Form W-4 captured with the full model so withholding is right on the first check; direct deposit and SSN/PII entered by the employee (or an admin on their behalf), encrypted at rest.
Benefits & state	New-hire benefit enrollment off the hire date per the client's waiting-period policy; state items such as CA DE 542 independent-contractor reporting triggered as applicable.

Everything the employee enters is the same record the paycheck, the 1095-C, and the new-hire report read from — no re-keying between onboarding and operations.