Sending 2-Stage Packets

Introduction

How to initiate a second packet of forms for your employee.

STEP 1

From the employee folder, select "Edit" in the Employee Information Section.

STEP 2

Scroll down to the form selection box and add the 2nd stage of forms you want to add. You may also remove access to their completed forms in this step so they don't re-do them accidentally.

Click "Update"

STEP 3

The employee will need to be notified that there are additional forms to submit. You can do this by sending them a message from the system, or email, phone, or in person.