

JobDiva & Onboarding Guideline

(06.17.2023)

In this document, you'll find the standard procedure for onboarding different types of candidates and role types. You'll also find training on how to do the steps in JobDiva.

US AGREEMENTS: <https://intelliprogroup.larksuite.com/drive/folder/fldusUG0V24vb4H2KMzMqWUlQqc>

CANADA AGREEMENTS: [📄 Canada Employment Guideline - Contractor - Onboarding Process](#)

BIG REMINDER: TERMINATE YOUR CONTRACTS OR NO START YOUR FTE IN JOB DIVA!

Updates to be added into the document:

- 8/9/2023 for all contract extensions, please create a NEW ASSIGNMENT, do NOT extend the old assignment end date.
- 1/0/2023 Demo Video and Additional Training: [📄 Jobdiva Demo](#)
- 1/10/2023: For all contracts, if the contract ends early or end in general, PLEASE make sure you end the contract in Job Diva, otherwise missing timesheet notifications will keep prompting for all parties involved.
- **CONVERSION - terminate the candidate, and do the FTE placement and communicate it with Accounting Team to generate a invoice**
- For clients who choose to use their own timesheet instead of JobDiva, candidates will be responsible for submitting a copy of their approved timesheet along with their invoice for INC or for those under our payroll, they will have to submit their timesheet twice, once for the client and once to JD for AM to approve.
- For candidates sending Invoice (C2C / INC): While the candidate sends the invoice to accounting@intelliprogroup.com; please help save the invoice once you get from the contractor with the subject (INC Name+ payment period) into this Lark Folder: https://intelliprogroup.larksuite.com/space/folder/fldusj2Ml0wpyVS6pFFJw7GQu9d?from=auth_notice

FTE Onboarding Process (Moving from JobDiva to APN in the future)

...in the meantime, you'll have to complete the process in APN and JobDiva. After all agreements/contracts have been signed by both the Client and the Candidate, please ensure they are uploaded into APN. In APN the Recruiter should update the Candidates activity to "Offer Accept", then the Account Manager will complete the onboarding process.

1. AM: Gather the required information; the start date, guarantee period, and fee %.
2. AM: Enter all information into JobDiva (reminder to choose "Direct Placement" as the job type). This information will be used to help generate the invoice. Once complete, please notify the Account Team on the new placement.
3. Accounting Team ([@Lindsay Lin](#) & Accounting@intelliprogroup.com): Creating the invoice
 - a. Reminder to only send invoices after the candidate has started his first day of work.
 - b. AM: Please remind the Accounting Team to generate the invoice.
 - i. **Account Managers will be responsible for sending and following up on the invoice (please send on onboard date to client)**
 - c. All parties will be cc'd on the email. Note that Accounting Team will send a reminder notice, but ultimately it's the Account Manager's duty to get the client to pay the bill.

JobDiva Process (Recruiter & Account Manager)

1. JobDiva Process (Recruiter & Account Manager)
2. AM: Create the Company (if the company does not exist - use the company's invoicing name i.e. Google vs Alphabet)
3. AM: Create the Contact for the Company (if the contact does not exist)
4. AM: Create the Job - For FTE placements only, the suggestion is to just create a job to put all FTE candidates into for generating the invoice. IE: call it "2021 - [Client Name] Hires"
 - a. Example: JobDiva Req.: **20-00093**
5. Recruiter: Create the candidate and submit the candidate in JobDiva to the job req. created.
 - a. Reminder to use "**External Submit**": Submit the candidate to the client contact, **NOT** to the AM; this is the only way for you to see the onboarding functions.
6. AM: Set start information
 - a. Warranty Date
 - b. Enter all the role types involved - other AM, Sourcers, Recruiters, etc.
 - c. Double Check:
 - i. Candidate's name
 - ii. Onboarding date
 - iii. Invoice (GM) Amount
 - iv. Contribution percentage - Internal role % split (specify in notes)

- v. Client's name and billing address
- 7. AM: Notify & Remind Accounting Team to send out Invoice on the start date of the candidate.

Regular Contractor Onboarding Process (any contractors under IPG Banner - W2, T4, etc.) - Same Process for RPO

In APN the Recruiter should update the Candidate's activity all the way until "Offer Accept" then the Account Manager will complete the onboarding process. Once done, please enter the information into JobDiva

JobDiva Process (Recruiter & Account Manager)

1. AM: Create the Company (if the company does not exist - use the company's invoicing name i.e. Google vs Alphabet)
2. AM: Create the Contact for the Company
3. AM: Create the Job - ensure you have an accurate job description in there as well.
4. Recruiter: Create the candidate and submit the candidate in JobDiva to the job req. created.
 - a. Reminder to use "**External Submit**": **Submit the candidate to the client contact, NOT** to the AM; this is the only way for you to see the onboarding functions. Once complete please notify the AM.
5. AM: Setup the Start information (**Set** button under Start) - set start date, end date (which was confirmed by both the client and candidate), rates, and role % split in the notes
 - a. Ensure you enter the Primary Recruiter and Primary Account Manager
 - b. For any additional role % split please specify in notes as a reminder
6. AM: Setup Onboarding (**Manual process for Canada T4 Contractors**)
 - a. Onboarding Package: select APAC (by default) or the onboarding package you require, remove or add any documents that should be sent to the candidate.
 - Remove all California (CA) docs for candidates that aren't working in California (CA)
 - Select the right offer letter based on an hourly rate, weekly rate, yearly rate, etc.
 - Send any additional info if your client requests the candidate via email.
 - b. Send onboarding email through JobDiva
 - use APAC template, double-check all information
 - cc payroll@intelliprogroup.com and hr@intelliprogroup.com, Account Manager, and Recruiter
7. AM: Set up the [Assignment] (DO THIS ON THE START DATE OF THE CANDIDATE)
 - a. Enter all information for the client and the candidate

- b. Once both sides are approved, you can click the pencil icon to create timesheet portal info for the candidate and client.
- 8. AM: Setup timesheet portal credential and send instructions for timesheet entry and approval to Candidate and Client (see bottom of this doc for templates)
 - a. Do not send instructions until the first day of work
 - Timesheet Entry Format should always be Time in/ Time out (should the client choose to use JD for Timesheet Management)
- 9. AM: If this is the first placement for this particular client, inform payroll@intelliprogroup.com and accounting@intelliprogroup.com for proper invoicing (CC [@Lindsay Lin](#)).
 - a. verify invoicing frequency and payment terms (based on MSA)
 - b. Contractors are paid biweekly (same schedule as our internal team); the offer package includes the payment schedule.
- 10. AM: Complete a "simple background check" for contractors. Please contact [@Ross Fensterwald](#) , [@Seven Huang](#) or [@Hedy Zhan](#) to get a Checkr account and instructions.
 - a. Please contact [@Viki Matthews](#) to get a HireRight account and instructions for clients who require an extensive background check.

NOTE:

- Work Orders will have to be signed before the contractor start work. These WO are sent out via e-Sign (DocuSign / PandaDoc) System.
 - Reach out to [@Pascaline Apaloo](#)
- Although Accounting Team will send reminder notice; ultimately its the Account Manager's duty to get the client to pay the bill
- Following up on timecard submission is the Recruiter's responsibility

T4 Contractors

For the time being there is no onboarding package in JobDiva for Canadian Contractors. Once complete please notify HR (hr@intelliprogroup.com) and [@Annabel Yang](#) about the new placement.

- AM: Please fill and send out the following contract manually
- RM/AM: the following documents need to be collected
 - a. Offer Letter
 - b. Candidate will need to go to: <https://www.canada.ca/en/revenue-agency/services/forms-publications/td1-personal-tax-credits-returns/td1-forms-pay-received-on-january-1-later.html>
 - i. Fill out the Federal Tax Credit Return Form (Work Sheets not required)

- ii. Fill out their Provincial Tax Credit Return Form (Work Sheets not required)
- c. Direct Deposit form for payroll
- d. Banking information must match your identity
- e. Copy of your Photo ID
- f. Copy of your SIN number via:
 - i. SIN CARD
 - ii. Gov issued documentation: i.e. Tax Return, SIN Letter
- g. Copy of your Work Permit if Applicable (Open Work Permit / PR Card)

Resource

 [Canada Employment Guideline - Contractor - Onboarding Process](#)

 [2021_Intellipro Canada_Payroll_Schedule \(1\).pdf](#)

Corp2Corp (C2C) Contractor

The process is similar to the Regular Contractor Process, except there is no onboarding process (**step 6**) since the candidate is no longer considered an employee, but a business. When choosing the position type, make sure you select C2C.

1. AM/Recruiter: Gather all the details; start date, end date, bill rate, pay rate, etc. and confirm the verbal acceptance of the offer from the candidate.
 - a. AM: Copy of I9 and E-Verify results to prove candidate's work status
 - b. AM: Collect proof of insurance, details on insurance requirements is in MSA.
 - c. Have the reference check, the list of benefits from the Corp in case the client wants those details.
2. AM: Using the contract template below "Intellipro C2C MasterServiceAgreement" please prepare the contract (offer letter) for the candidate to sign.
 - a. Please CC Recruiter, Accounting Team
 - b. **NOTE:** By default, the invoice frequency is monthly, and the payment is 45 days upon receipt of invoice and payment received from the client (Net 45).
3. AM: Send any custom onboarding material that the client request
4. AM/Recruiter: if the client request that the candidate uses JobDiva for timesheet management please follow the same process as the Regular Contractor Process.
5. AM: When notifying the Accounting team, please remind them of the invoice frequency and payment term for candidate and client. (Based on MSA signed by both parties)

Note:

- C2C contractors should have their own insurance and must provide the certificate as proof
- Do not worry about visa situations; only need to confirm I9 and E-Verify (i.e. candidate has work authorization), HOW to let candidate work is the Corp's responsibility
- Although Accounting Team will send reminder notice, ultimately it's the Account Manager's duty to get the client to pay the bill.
- If the client requires background check, the Corp will have to provide it.
- Following up on timecard submission is the Recruiter's responsibility
- **AM: Contract for Client:** Have both contracts ready before the employee starts (MSA and Work Order)
 - MSA: Between IPG and Client, can be used with any role in the company
- The best practice is to ONLY start working on a role when both items are signed.
- Work order: ensure it has the bill rate, start date, end date, working hours per week, exempt of non-exempt (i.e. overtime eligibility), or special cases like part-time work
- The best practice is to ONLY start working on a role when both items are signed.
- **AM: Contract for Corp (candidate):**
 - MSA: Between IPG and Corp (candidate)
- SOW: do **NOT** include BILL RATE!
 - ALL other information is the same as the Work Order
- Every candidate is ABLE to transfer a visa outside their employer into our W2 if they want to
- All benefits are covered by the Corp for the candidate
- Resignations are technically "at-will" in the US (no 2-weeks notice is legally required), but we will ask for 2 weeks
- C2C Offer letters are to employees so the Corp will send them to the candidate (not IPG)
- **JobDiva:**
 - When filling out the [Assignment] portion, Employment Category in most cases will be "Sub Contractor"
 - Overtime Exempt in most cases should be checked off as C2C and INC contractors do not qualify for OT.
 - Confirm if the currency paid to the candidate will be in CAD or US
 - Timesheet Entry Format should always be Time in/ Time out (should the client choose to use JD for Timesheet Management)

Resource

[Intellipro_C2C_MasterServiceAgreement - "Entity"](#)

INC Contractor (CANADIAN INC CONTRACTOR)

The process is similar to the Regular Contractor Process, except there is no onboarding process (**step 6**) since the candidate is no longer considered an employee, but a business.

1. AM/Recruiter: Gather all the details
 - a. AM: start date, end date, bill rate, pay rate, etc.
 - b. RM: Confirm the verbal acceptance of the offer from the candidate.
 - i. Gather the candidate's INC documentations, HST/GST Information, Business Banking information, and proof of insurance (minimum \$1M in GL and PL E&O) and have it all ready to provide to the Account team if requested.
 - ii. Recruiter to verify and send copy to AM for filing on BOX
 - iii. Please file in: Create a folder for Client and Candidate

NOTE: IPG Canada has a preferred vendor for insurance, ProLink please find the info package to send to the candidate in the Canada Employment Guideline linked below.

2. AM: Using the contract template below "Independent Contractor Agreement" please prepare the contract (offer letter) for the candidate to sign.
 - a. Please CC Recruiter
 - b. Reminder to use the candidate's INC information to fill out the contract
 - c. **NOTE:** By default, the invoice frequency (timesheet update) should be weekly, and the payment is biweekly.
3. AM: Send any custom onboarding material that the client request
4. AM: if the client request that the candidate uses JobDiva for timesheet management please follow the same process as the Regular Contractor Process.
5. AM: When notifying the Accounting team and please remind them of the invoice frequency and payment term for candidate and client. (Based on MSA signed by both parties)
6. AM/RM: explain the invoicing process to the candidate
 - a. @Yunan Duan send out the actual instruction template below and all the associated documents

Note:

- Although Accounting Team will send reminder notice, ultimately it's the Account Manager's duty to get the client to pay the bill.
- If the client requires background check, then IPG will have to provide it.
 - we have multiple background check platform, please check with your manager.
- INC offer letters will come from IPG

- Following up on timecard submission is the Recruiter's responsibility
- **JobDiva:**
 - When filling out the [Assignment] portion, Employment Category in most cases will be "Sub Contractor"
 - Overtime Exempt in most cases should be checked off as C2C and INC contractors do not qualify for OT.
 - Confirm if the currency paid to the candidate will be in CAD or US
 - Timesheet Entry Format should always be Time in/ Time out (should the client choose to use JD for Timesheet Management)

Resource

 [Canada Employment Guideline - Contractor - Onboarding Process](#)

 [2021_Intellipro Canada_Payroll_Schedule \(1\).pdf](#)

 [INC Invoices Template](#)

Sample Email Template for Invoicing Instruction

From:

To: [Candidate's Email]

Cc: [Account Manager], [Recruiter]

Subject: Please Issue Your Bi-weekly Invoice

Hi [Candidate's Name],

For us to process your biweekly payroll, please make sure to submit your timesheet and have it approved **before each Sunday by 11:59 PM Pacific Time** and always send your bi-weekly invoice **before Monday of each payroll week** to accounting@intelliprogroup.com. Reminder that invoices will only be paid when proof of timesheet approval by your manager has been received.

Please be aware that late submission may cause payment delay.

Each pay period covers past two weeks (10 working days). You may find attached 2021 Canada payroll schedule for more details regarding payday and pay period.

Attached you may also find an invoice template for your reference. All invoices will be paid through ETF payment. Within your invoice, please include the total working hours of the past two weeks, your bank account info and name your invoice as the following format:

IPG_ Your name _#001_invoice date

IPG_ Your name _#002_invoice date

If you have any questions, feel free to contact us.

Sincerely,

JobDiva Basics

Creating a Candidate

1. Choose [New Candidate] on the dashboard under [Talent]
2. Upload the candidate's resume, and ensure all contact information is accurate.

Creating a Company

1. Choose [New Company] from the dashboard under [CRM]
2. Input all the required information
 - a. Ensure information is accurate, as the information will be used to set up the invoice
 - b. Ensure the name is the INVOICE name... ie Google vs Alphabet

Creating a Contact

1. Choose [New Contact] from the dashboard under [CRM]
2. Input all the required information
 - a. Choose the company you wish to add the contact to, as you start typing, a drop-down list will pop up to ensure it exists in the system.

Creating a Job

1. Choose [New Jobs] from the dashboard under [Jobs]

2. Enter all the required information

- a. if you enter the contact, the company will auto-fill; please ensure information is accurate
- b. for the state, you can choose "state" for anywhere in the US
- c. for contracting roles, you MUST enter the Job Description
- d. for division just choose the one that makes the most sense, or "independent"

Creating Timesheet Approver

- 1. Find the contact you want to give access to
- 2. Click on the timesheet icon to create a login

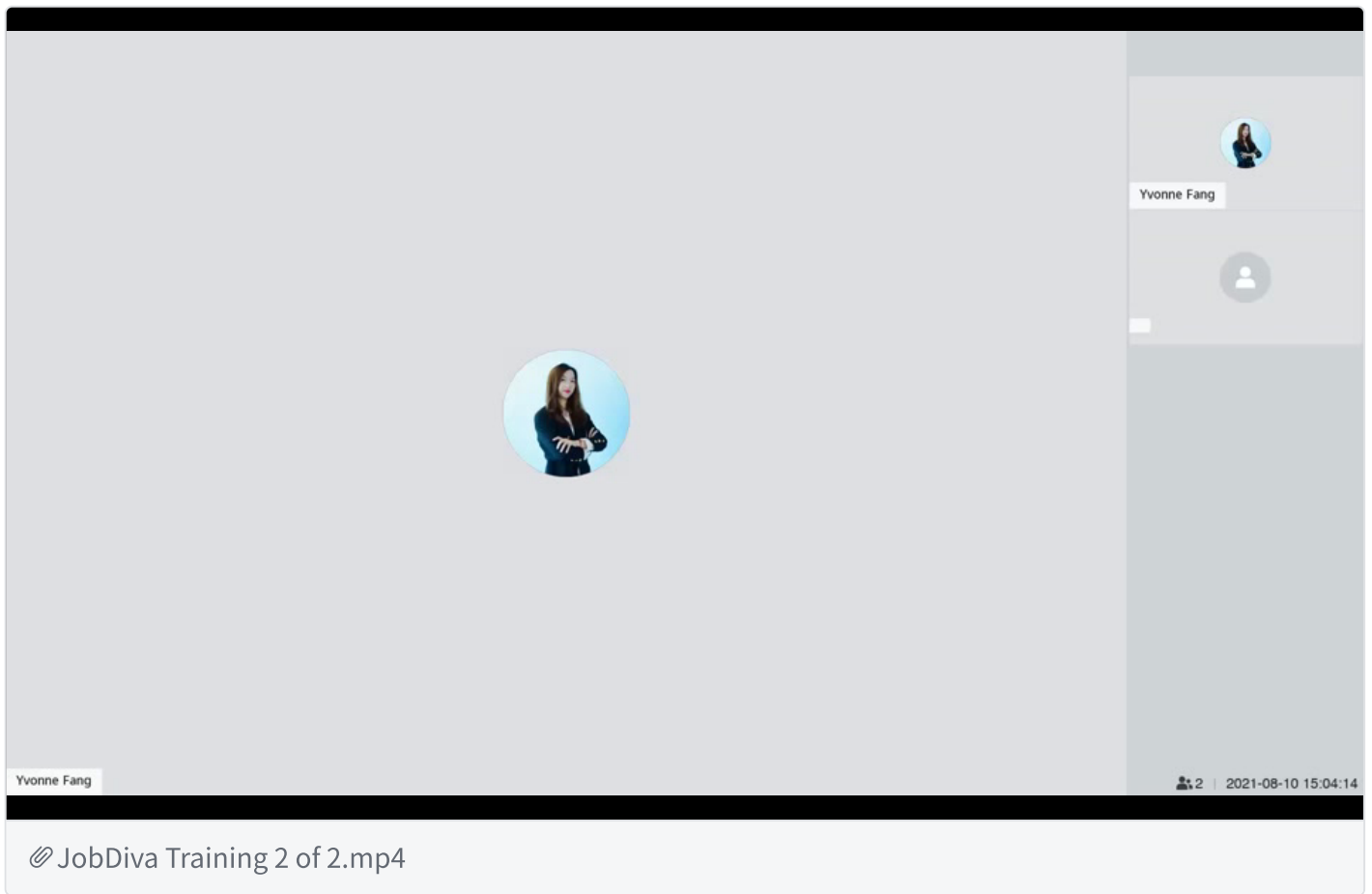


- 3. Fill in the information and create a temporary password

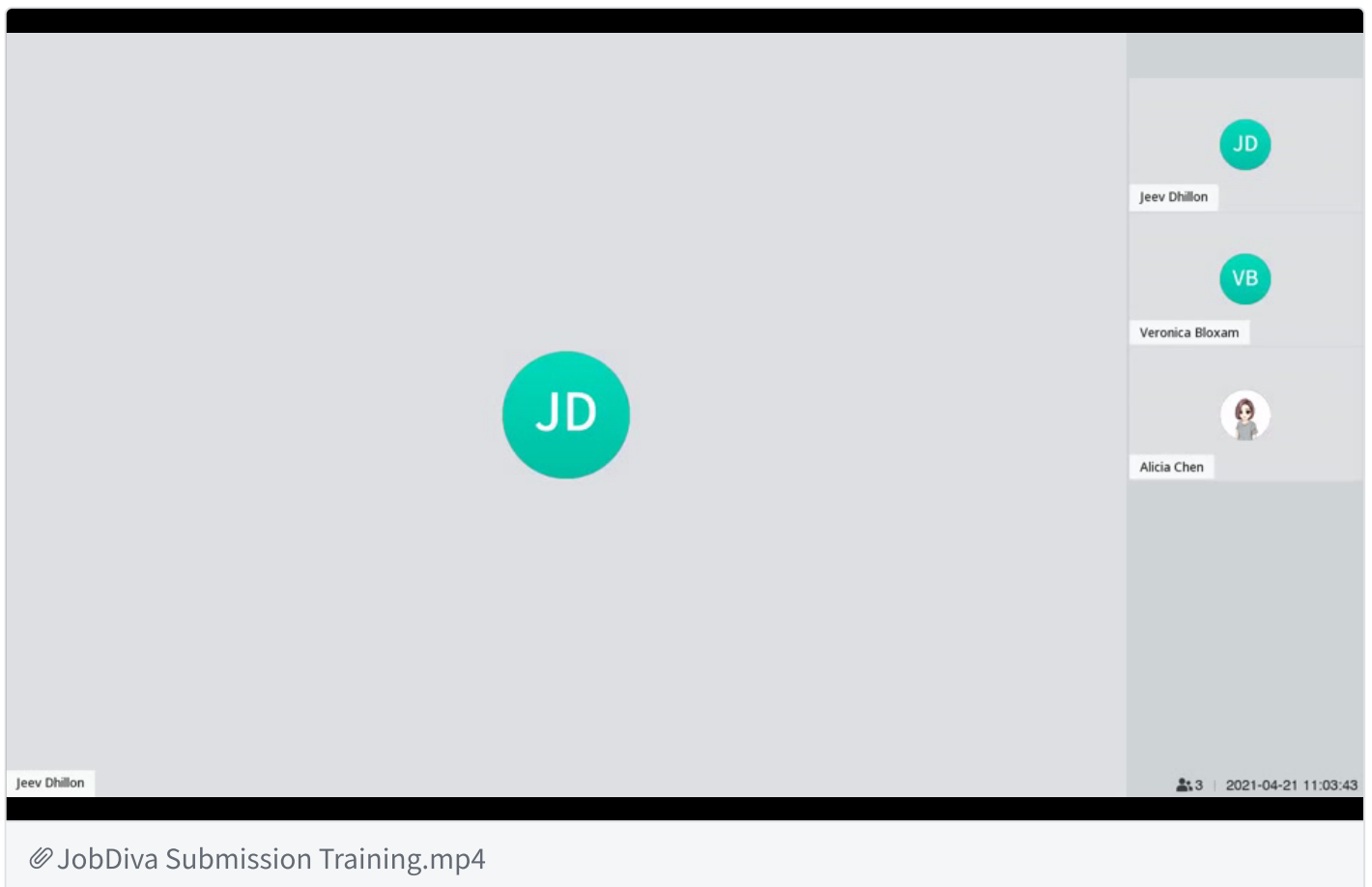
Video: Walkthrough - Onboarding w. JobDiva



🔗 JobDiva Training 1 of 2.mp4



Video: Walkthrough - Submitting Candidate



Additional Resource

Demo Video and Additional Training:

 [Jobdiva Demo](#)

Contact Info

For Invoice & Payment: [@Yunan Duan](#) [@Sarah Lai](#)

Accounting Team (accounting@intelliprogroup.com):

Payroll Team (payroll@intelliprogroup.com): [@Annabel Yang](#) (Canada), [@Sarah Lai](#)

HR Team (hr@intelliprogroup.com): [@Stella Yang](#) [@Jennifer Liu](#) [@Pascaline Apaloo](#)

Onboarding Assistance: [@Pascaline Apaloo](#)

JobDiva Assistance: [@Orange.Zheng](#) [@Edwin Chang](#) (for JobDiva Access)

Update:

Team members with duties related to other departments:

[@Lindsay Lin](#) : W9 form maintaining, IPG business tax related communication

[@Sarah Lai](#): (works part time Mon-Wed): IPG in-house employees payroll, IPG Accounts payable (invoices payments IPG needs to pay out)

[@Amy Zhao](#): IPG GMV contractors payroll, Fespro financial statements preparation and tracking invoices payments

[@Cathy Liu](#) : IPG & IPG Canada invoice issuing support, quarterly GM report preparation, accounts receivable monitor, IPG & Uoffer financial statements preparation

[@Annie Meng](#) : IPG Canada payroll, IPG Canada accounts payable, Uoffer payroll

Candidate Timesheet Instruction Email Template

From: [AM]

To: [Candidate]

Cc: payroll@intelliprogroup.com; hr@intelliprogroup.com; recruiter

Subject: Timecard Instruction - [Candidate's Name]

Hi [Candidate's Name]

It's a pleasure to share with you about our timecard submission process on our website. Please follow the simple steps below and let me know if you have any concern.

1) Please use your email address to log into the website (the following link) you used to sign the onboarding documents,

Email: [Candidate's Email]

Password: [Default Password]

link: <https://www2.jobdiva.com/portal/?a=hujdnwvdl5154ljxyxi7zek868kewz042cpqx9t9lkq3hbzw4afwbm2dqbnx0ymd&compid=0#/login>

2) Click on "My Timesheets"

3) Please enter your working hours on a daily basis.

4) [Approving Manager] will approve your working hours.

5) Please always email [Approving Manager] for approval and CC [Account Manager] if you would like to request any day off or need to work overtime.

Client Timesheet Instruction Email Template

From: [AM]

To: [Client]

Cc: payroll@intelliprogroup.com; hr@intelliprogroup.com;

Subject: Timesheet Approval Process - [Candidate's Name]

Hello [Client],

Below are the login credentials for approving the timesheet for [Candidate's Name]

For the timesheet approval process, we have created the User name and Password for you to log in.

Website: https://www.jobdiva.com/index.jsp?2016_17 (You can also download “JobDiva” App on your phone to approve timesheet through your mobile device)

Username: [your email]

Password: [default password]

Once logged in, you may need to change the password to your own. Please approve timesheets once [Candidate's Name] submits them into the system every week.

Feel free to let me know if you have any other questions.

Thank you.

Best Regards,
