**Smart ERP - Digital Assistant User Stories**

**User Story 1:**

Jon was just hired by The Company. His recruiter has created a profile for him in **HCM** and has given Jon his employee ID # via email.

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| --- | --- |
| Jon: | Hi |
| Chatbot: | Hi, welcome to the onboarding DA. Please enter your employment ID #. |
| Jon: | {{00071294749}} |
| Chatbot: | Here is your profile. Would you like to make changes |
| Jon: | No. |
| Chatbot | Great. Glad your information is correct! |

**User Story 2:**

Jon’s recruiter has sent him a link to a site where he can take care of all his paperwork before starting his first day at his new job. FIlling out the i-9 and W-4 forms beforehand will make the first day run smoothly.

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| Jon: | Fill out forms |
| Chatbot: | Hi, I see you have yet to fill out your i-9 and W-4 forms. Let’s begin with W-4.  Please click the link below:  <https://www.irs.gov/pub/irs-pdf/fw4.pdf> |
| Chatbot: | Now, let’s take care of your i-9.  <https://www.uscis.gov/system/files_force/files/form/i-9-paper-version.pdf> |
| Jon | \*fills out pdf forms and uploads them to DA\* |

**User Story 3:**

It’s a few days before his job begins and Jon is excited but nervous. He has some questions as he prepares for the first day.

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| --- | --- |
| Jon: | Do I need to bring anything on the first day? |
| Chatbot: | * Forms of ID for i-9 (<https://www.uscis.gov/i-9-central/acceptable-documents>) * Download parking permit * Lunch is provided |
| Jon: | Who is my manager? |
| Chatbot: | <displays profile card> |
| Jon: | Meet my team |
| Chatbot: | <carousel profile cards> |

**User Story 4:**

It’s Jon’s first week and he must enroll in benefits. The HR representative is planning a visit to the office; however, Jon would like to explore the options beforehand.

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| --- | --- |
| Jon: | What are my benefits? |
| Chatbot: | Benefits (<company link for benefits overview here>)  <carousel of   * Kaiser * HSA * PPO   > |

**User Story 5:**

On Jon’s first day, he must set up direct deposit.

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| --- | --- |
| Jon: | Set up direct deposit. |
| Chatbot: | The instant app collects:   * Bank name * Bank branch * Bank’s mailing address * Type of account (checking or saving) * Account name * Account # * Bank routing # |