



# Getting Started – Onboarding Guide

## Welcome to Banff Caribou Properties!

This is a guide on how to provide your documents (banking information, work permit etc.) to Human Resources. It is called onboarding and is essential for your employment with us.

**The steps within this document must be completed before your first day of work.**

### Activate Your Account

After accepting your job offer, Human Resources will send you will receive an email to activate your Dayforce account. Please activate your account as soon as you can – the link expires after 3 days.

After you have activated your account, the link to go to Dayforce is

<https://www.dayforcehcm.com/mydayforce/login.aspx>

### Upload Your Documents

Log into your Dayforce account (Internet Explorer and Firefox are the web browsers that work the best). Select the *Getting Started* icon. Or select *Getting Started* from the Menu.



Please read the instructions provided at the beginning of each form. You will also find information about the company, the local area and resources, and key employees you need to know on the *Getting Started* page.

You will be required to provide information and/or upload electronic copies (JPG or PDF) of the following documents.

- Social Insurance Number (SIN), i.e. a copy of SIN card or government issued document showing both your name and SIN number (example - tax return)
- Direct Deposit Banking Information
- Canadian Employees – Government Issued Photo ID
- Non-Canadian Employees - Work Permit and Passport

When you are ready to begin select *Your Onboarding Forms*.

## Your Onboarding Forms

Welcome Message **Your Onboarding Forms** Employee Checklist Key People Resources

### Your Onboarding Forms

Hello [Name], welcome to the "herd"! Prior to your first day on 3/4/2019 as a [Title], we'll need you to complete the following forms. If you have any problems, please contact your manager ([Email]).

To successfully complete the following process, you will need to have your Social Insurance Card (or letter of confirmation), your banking information for direct deposit (this is how we pay you), a government issued photo ID if Canadian or Permanent Resident, and a passport and work permit documentation if not. You will need electronic copies of all of these, so you may want to take photos before you begin, if you don't already have electronic copies.

Please note - each individual form in the list below needs to be submitted separately. If you've started a form, and want to continue to work on it later, please save (but don't submit). This should allow you to re-open and carry on. Once you're happy with the information, please press submit. The status of the form should change to Completed or Pending Approval depending on which form it is.

★ Attend your first day Monday, March 4, 2019

0/2 > Payroll Information

0/6 > Personal Information

There are two sections to complete 1. *Payroll Information* and 2. *Personal Information*.

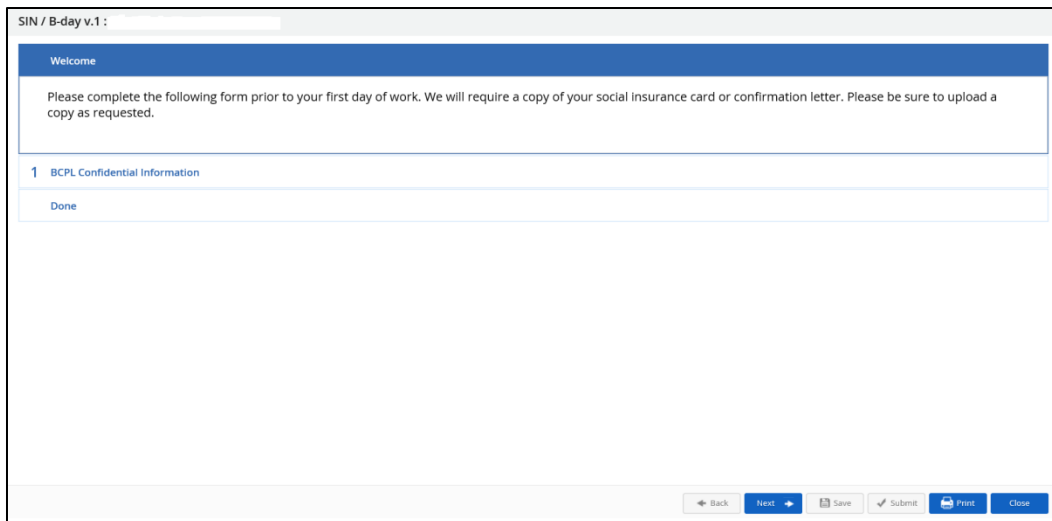
To open the section select *Payroll Information*. A drop down menu will appear as follows:

0/2 ▾ Payroll Information

**Past Due** SIN / B-day v.1 Due Date : 3/4/2019

**Past Due** Direct Deposit / Banking Details v.1 Due Date : 3/4/2019

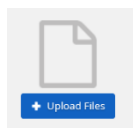
Click *SIN / B-day v.1*. The following will appear. **Please read the welcome message to understand the instructions for the information you need to enter and upload.**

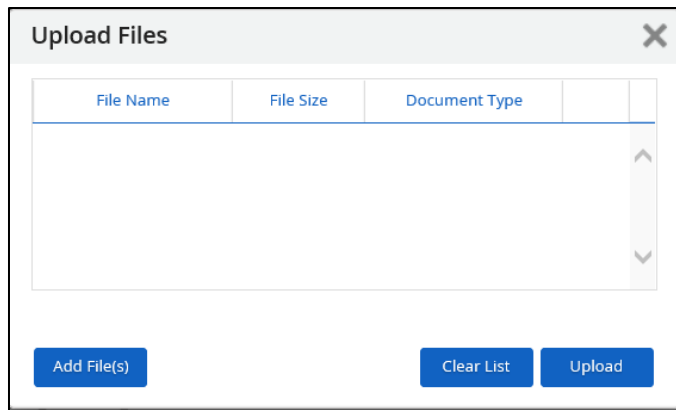


Select 1 BCPL Confidential Information. The following will appear:

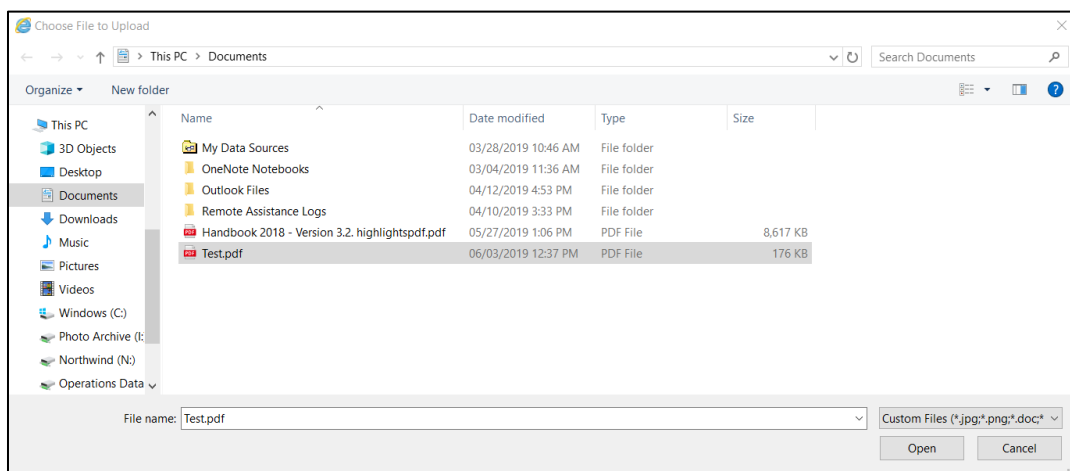
A screenshot of a web application window titled "SIN / B-day v.1". The window has a blue header bar with the text "Welcome". Below the header, there is a progress indicator showing "1 BCPL Confidential Information". Below the progress indicator, there is a section titled "Confidential Information (CAN)". Below this section, there is a grey bar with the text "Status: Active Employee Number: [redacted]". Below the grey bar, there is a section titled "Confidential Information". Below this section, there is a message: "This is your current confidential data information. If any details are incorrect, please update accordingly. Your SIN number and birth date are required. If you are a Canadian Landed Immigrant or Citizen, a SIN expiry date is not necessary. We require gender information for room assignments in employee housing. If you decline to answer, and require employee housing, you will be contacted by our HR or employee housing teams to discuss further." Below the message, there are input fields for "SSN/SIN\*", "Expiry Date", "Gender Identity", and "Birth Date\*". Below the input fields, there is a message: "We require a photo or electronic copy of your SIN card, a confirmation document or government issued paperwork showing both your name and SIN number (ie a tax return). Please attach a JPG, PDF, PNG, DOC, or DOCX file below\*". Below the message, there is a large grey area with a document icon and a blue button labeled "+ Upload Files". At the bottom of the window, there are navigation buttons: "Back", "Next", "Save", "Submit", "Print", and "Close".

In this screen you will need to enter in your SIN (Social Insurance Number), the expiry date if it has one, and your birth date. You will also need to upload a document with your SIN (e.g. the document/card from Service Canada or a copy of the part of your tax return containing your SIN). To do this select :

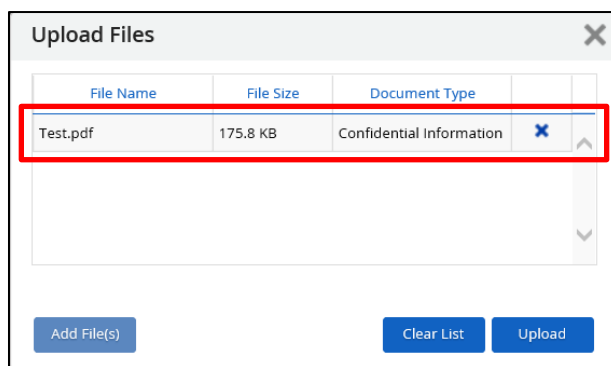




Select  , follow the file path to your document.



Select the document that is your SIN and then select *Open*. You will see the document listed in the *Upload Files* screen.



Then select  .

You will now see that your document has been attached.

SIN / B-day v.1 :

**Confidential Information (CAN)**

Status: Active Employee Number: [redacted]

**Confidential Information**

This is your current confidential data information. If any details are incorrect, please update accordingly. Your SIN number and birth date are required. If you are a Canadian Landed Immigrant or Citizen, a SIN expiry date is not necessary. We require gender information for room assignments in employee housing. If you decline to answer, and require employee housing, you will be contacted by our HR or employee housing teams to discuss further.

**SSN/SIN\*** [input field] **Expiry Date** [calendar icon]

**Gender Identity** [dropdown menu] **Birth Date\*** [calendar icon]

We require a photo or electronic copy of your SIN card, a confirmation document or government issued paperwork showing both your name and SIN number (ie a tax return). Please attach a JPG, PDF, PNG, DOC, or DOCX file below\*

Refresh | + Add | X Delete

File Name	Document Type	Last Updated	Last Modified By
+ Test.pdf	[icon]	06/03/2019 4:26:14 PM	

**Comment**

Add comment to the employee's file.

Back Next Save Submit Print Close

Once you have entered all of the information select *Submit* in the bottom right hand corner.



Now that you have completed the section, select *Close*.

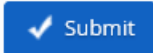


On this is submitted you will see that the status now says *Pending Approval* (as below). This means it has been submitted to Human Resources. Human Resources will accept the document if everything submitted is correct. *Pending Approval* will change to *Approved*.

0/2 Payroll Information

- Pending Approval**  
SIN / B-day v.1 Due Date : 3/4/2019
- Past Due**  
Direct Deposit / Banking Details v.1 Due Date : 3/4/2019

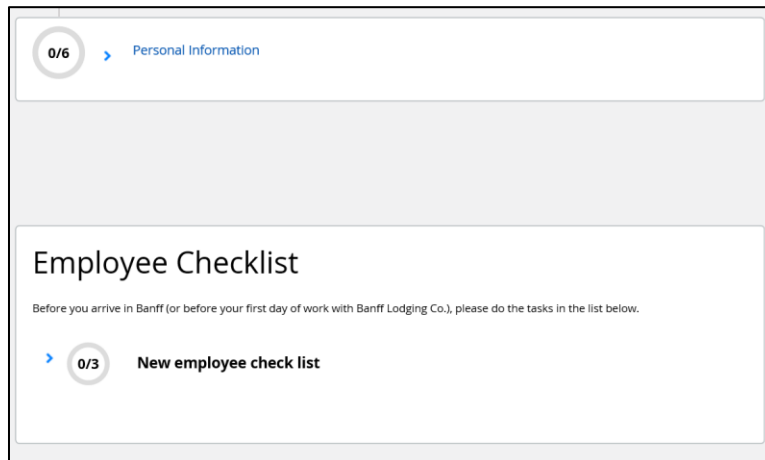
If the information submitted is incorrect, you will receive a notification in Dayforce saying that your upload has been rejected. Please open the notification, find out what the issue was and resubmit.

You have now completed your first document upload. Continue to move through the sections under *Payroll Information* and *Personal Information*. You must always click  at the completion of each section. If this is not done Human Resources will not receive your documents.

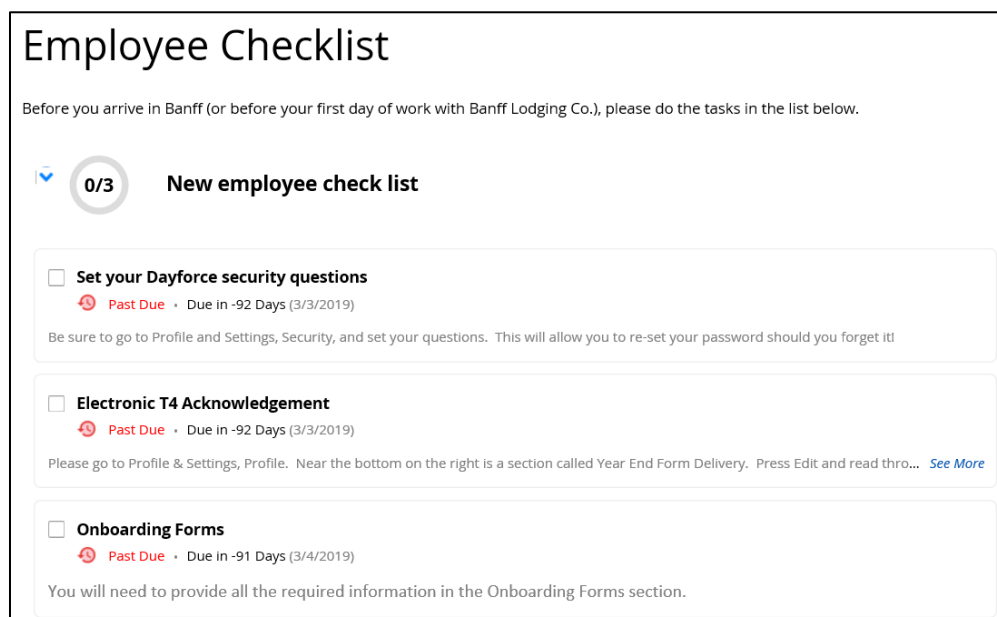
**All sections must be completed before your first day of work.**

## Employee Checklist

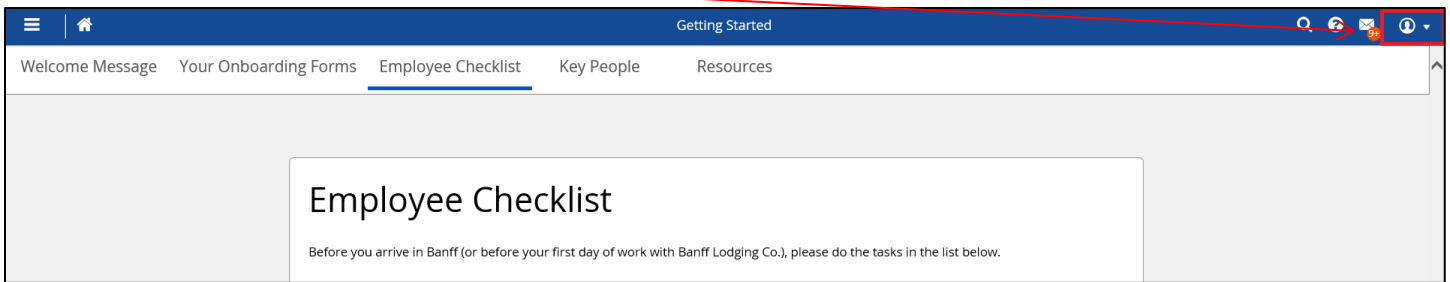
Once you have completed the Payroll Information and Personal Information you will come to a section called *Employee Checklist*. You have three tasks to complete. Follow the instructions to complete each task. When done, tick the task off the list.



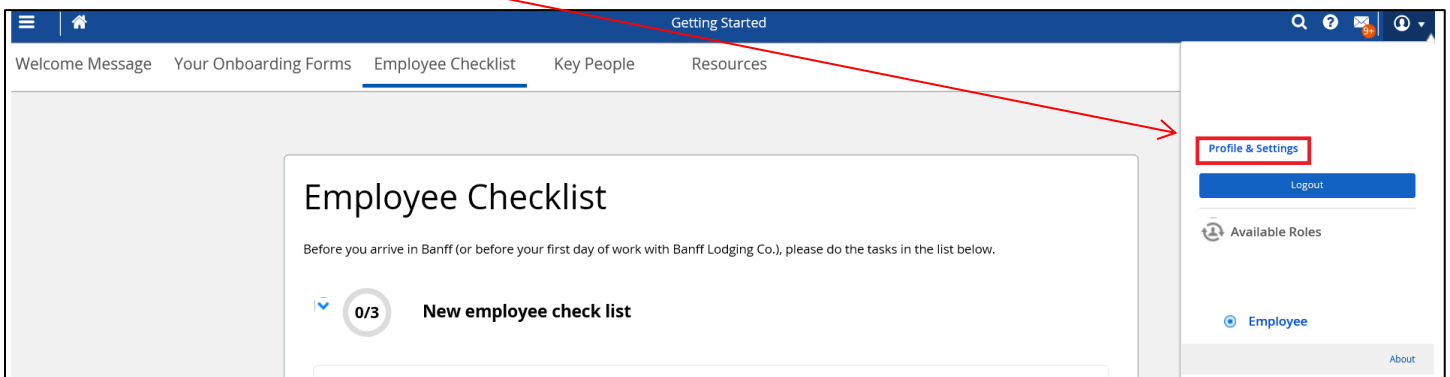
Select *New employee check list*



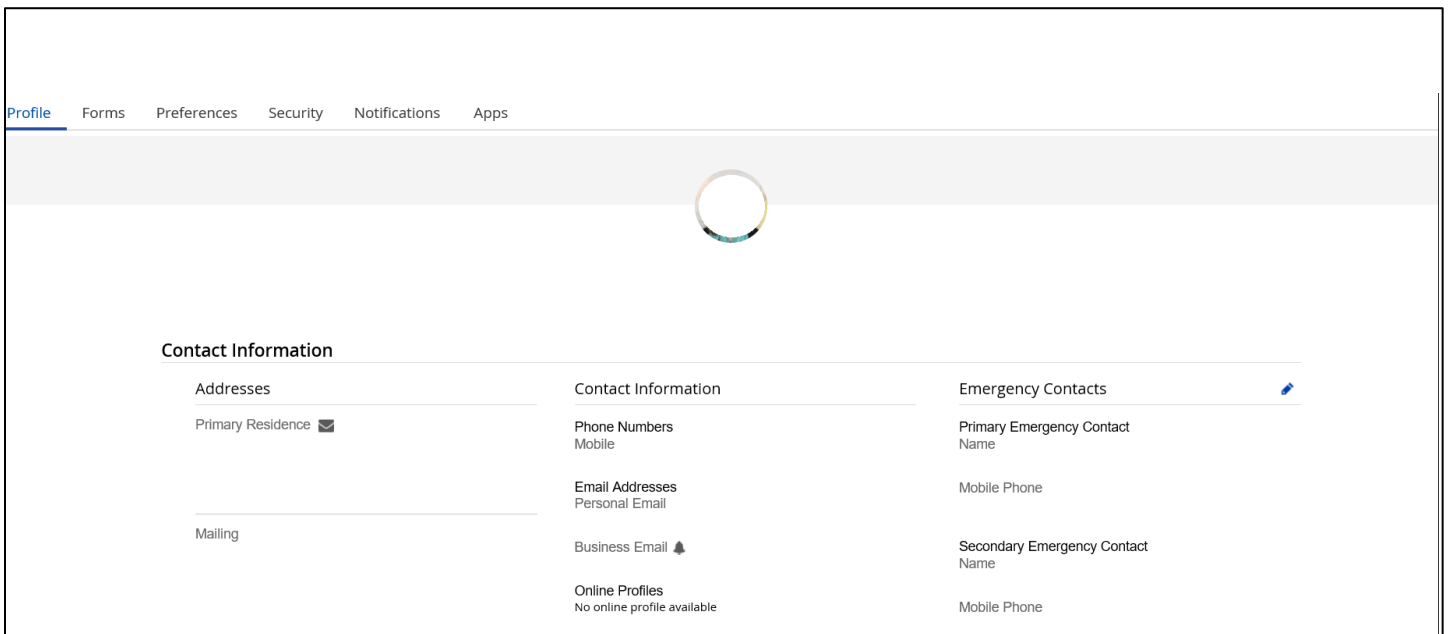
Click the Person icon in the top right hand corner of the screen.




Select Profile & Settings




You will see the following screen



Scroll down and go to the section titled *Work Information* and select *Year End Form Delivery* by clicking the  symbol.

**Work Information**

Employee Information	Payroll Information
Number	Pay Class
Status	Pay Group
Location	Pay Type
Position Title	Pay Frequency
Department	Annual Salary
Original Hire Date	
First Day Worked	Bank Name
Seniority Date	Account Type
Manager	Account Number
	Year End Form Delivery
	Canada Year End Forms 

You will always receive an electronic copy of your T4, if you consent to saving a tree by reducing printing and agree to the terms and conditions select the tick box and then select Approve.

**Year End Form Delivery** ✕

**Withdraw consent to receive electronic-only Year End Tax Statement(s) and to start receiving paper statements**

Employees may withdraw consent to receive electronic-only Year End Tax Statement(s). Employees withdrawing consent will receive a paper copy of the Year End Tax Statement(s). Employees will continue to have electronic access through Employee Self-Service.

Please read this entire notice and follow the instructions below.

Employees withdrawing consent must:

1. Select each Tax Form from the list below.
2. Click the Approve button to withdraw consent to electronic-only and begin receiving a paper tax statement as well.

- Withdrawal of consent will become effective immediately and for all subsequent tax years. Withdrawal of consent does not apply to tax statements issued in previous years.

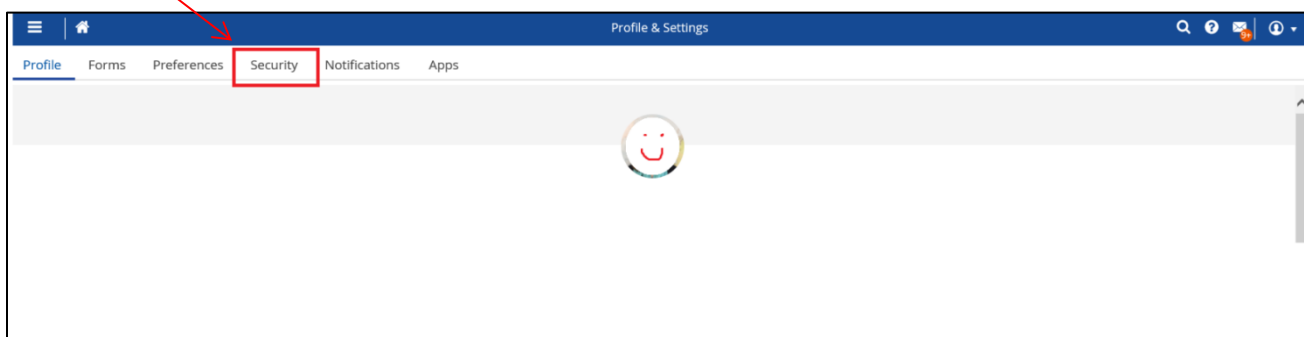
You will receive an acknowledgement of your withdrawal that contains the required disclosure information.

Canada Year End Forms

You have now completed the Employee Checklist Item – Electronic T4 Acknowledgment.

To complete the security questions continue with the following steps:

Select the *Security* tab





Enter your *Current Password*, then under *Security Question #1* pick the question and enter the answer below.

Profile Forms Preferences **Security** Notifications Apps

### Security Settings

**Update Password**  
Enter your current password and type your new password twice (once to confirm)


Current Password  
New Password  
Repeat New Password to confirm

**Update Security Questions**  
Select your security questions and enter the corresponding answers. Your Current Password is required to complete this process. These questions will be used to help verify your identity. Answers are case sensitive.

Security Question #1  
What was your childhood nickname?  
Answer #1

Security Question #2  
What was the name of your first pet?  
Answer #2

Save

Do the same for *Security Question #2* then press  .

You can now go back to the Employee Checklist and tick off *Set your Dayforce Security Questions*.

If you have any questions or difficulties you can contact:

**Human Resources**  
Email: [hr@bestofbanff.com](mailto:hr@bestofbanff.com)  
Phone: 403 760 8521