

# Beyond - Onboarding

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## HRCenter™ & Beyond™

Beyond makes onboarding new employees that enter your database from HRCenter easy by giving the service rep a convenient space on an employee record to process their online application. Employees that begin a workflow in HRCenter can be given additional material or assigned a brand new workflow within this space. To learn more about HRCenter check out [HRCenter 101!](#)

### This Article Covers:

1. [Searching for Applicants](#)
2. [Reviewing Workflows](#)
3. [Completing Workflows](#)

## Searching for Applicants

You can search for applicants at any step in the process by navigating to B Menu > Records > Onboarding

Select which workflow, step, and status and click search

**Onboarding Search** - Search all assigned onboarding steps

Tenant: twdemo | Workflow: Additional Pages | Step: Pages

Step Status: Current Step in Workflow | Last Name: [redacted] | First Name: [redacted]

Username: [redacted] | Employee Branch: [redacted] | Assigned By: All

RESET SEARCH

2,534 results

<input type="checkbox"/>	Employee Name	Employee Id	Username	Step Name	Step Status	Workflow	Active	Date Step Assigned	Employee Branch	Tenant	En
<input type="checkbox"/>	<a href="#">Aardson, Steve</a>	4295081481	steve.aardson2	Pages	Unstarted	Additional Pages	✓	October 20th 2021 11:09 AM	Minneapolis	twdemo	
<input type="checkbox"/>	<a href="#">Aardson, Steve</a>	4295081482	Aardson	Pages	Completed	Additional Pages	✓	June 25th 2021 10:22 AM	Eagan	twdemo	
<input type="checkbox"/>	<a href="#">Aardson, Steve</a>	4295081482	Aardson	Pages	Unstarted	Additional Pages	✓	January 16th 2025 9:57 AM	Eagan	twdemo	
<input type="checkbox"/>	<a href="#">Aardson, Steve</a>	4295081482	Aardson	Pages	Unstarted	Additional Pages	✓	August 7th 2024 3:31 PM	Eagan	twdemo	
<input type="checkbox"/>	<a href="#">Aardson, Steve</a>	4295081482	Aardson	Pages	Unstarted	Additional Pages	✓	August 28th 2024 4:03 PM	Eagan	twdemo	
<input type="checkbox"/>	<a href="#">Aardson, Steve</a>	4295081482	Aardson	Pages	Unstarted	Additional Pages	✓	December 8th 2022 2:14 PM	Eagan	twdemo	
<input type="checkbox"/>	<a href="#">Aardson, Steve</a>	4295081482	Aardson	Pages	Unstarted	Additional Pages	✓	August 6th 2024 5:00 PM	Eagan	twdemo	
<input type="checkbox"/>	<a href="#">Aaron, Amanda</a>	4295038894	a.aaron	Pages	Unstarted	Additional Pages	✓	August 28th 2024 4:03 PM	Minneapolis	twdemo	
<input type="checkbox"/>	<a href="#">Aaron, Amanda</a>	4295038894	a.aaron	Pages	Unstarted	Additional Pages	✓	February 2nd 2021 10:48 AM	Minneapolis	twdemo	

Rows per page: 20 | 81-100 of 2534 | 1 ... 4 5 6 ... 127 >

If you already know the applicants name, you can also find their HRCenter application information on the employees record under the Onboarding tab:

Workflow	Current Step	Current Step Status	Date Assigned ↓	Date Completed	Date Rejected
<a href="#">Policies and Procedures</a>	Pages	Unstarted	1/16/2025		
<a href="#">Electronic W2 Enrollment</a>	Pages	Unstarted	8/28/2024		
<a href="#">Onboarding</a>	Background	Unstarted	8/9/2024		
<a href="#">Dynamic State W4 - Default</a>	Pages	Unstarted	8/7/2024		
<a href="#">Welder Questions</a>	Pages	Unstarted	8/6/2024		
<a href="#">Additional Pages</a>	Pages	Unstarted	12/8/2022		
<a href="#">Additional Pages</a>	Pages	Completed	6/25/2021	6/25/2021	
<a href="#">Basic Application</a>	Onboarding Docs	Unstarted	5/26/2021		

## Reviewing Workflows (Applications)

When you have selected a workflow from either the onboarding search or the employee record, you will be able to see the details for that workflow:

Workflow  
Basic Info - Default

Steps  
1

Pages  
1  
SELECTED

CONTINUE TO NEXT STEP

**Workflow Details**

Date Created 5/1/2023	Date Completed 5/1/2023
Date Rejected --	Rejection Reason --
Assigned By Doaa Hassan	

**Step Details**

Date Started 5/1/2023	Date Completed 5/1/2023
Date Submitted 5/1/2023	Status Completed

**Required Signatures**

No signatures are required right now

**Pages**

- ✔ Basic Info

At the top of the page is the name of the workflow and the current step, if they have already completed step 1 in a multi-step workflow you will see options to select other steps:

Workflow  
Basic Info - Default

Steps  
1

Pages  
1  
SELECTED

CONTINUE TO NEXT STEP

There are 4 cards of information for each step:

### 1. Workflow Details

- This card contains information on when the workflow (application) was assigned, completed, and if it was rejected.

Workflow Details	
Date Created 5/1/2023	Date Completed 5/1/2023
Date Rejected --	Rejection Reason --
Assigned By Doaa Hassan	

## 2. Step Details

- This card contains information on when the employee started, submitted, or completed the current step.

Step Details	
Date Started 5/1/2023	Date Completed 5/1/2023
Date Submitted 5/1/2023	Status Completed

- Statuses include:**
  - Not Started**- Employee has registered yet completed no pages in the current step.
  - In Progress**- Employee has completed at least one page in the current step.
  - Submitted**- Employee has submitted the current step for the service reps review. The employee will be unable to edit information once it has been submitted, unless the service rep unlocks the step.
  - Completed**- Employee has completed all necessary steps and the service rep has marked this step as complete.

## 3. Required Signatures

- This card lets your staffing specialist know if there are any documents that need to be reviewed or signed by them.

## 4. Pages


- This shows you the list of pages that are included in this step of the workflow and which pages they completed.

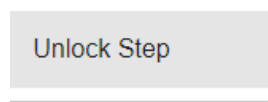
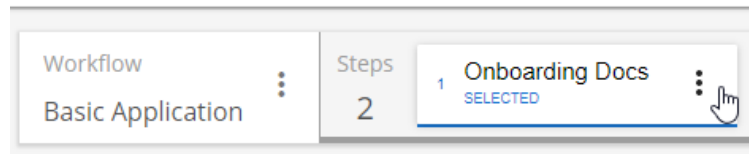
Pages
<div style="display: flex; align-items: center;"> <span style="color: green; font-weight: bold; margin-right: 5px;">✔</span> <span>Basic Info</span> </div>

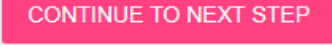
- You can also use the "+" to add an additional page to the current step.


## Completing a Workflow

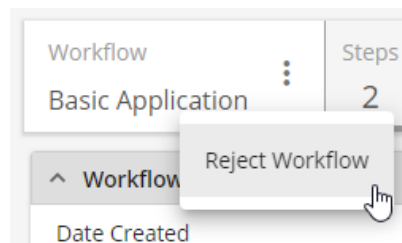
Once a staffing specialist has reviewed a submitted workflow they will need to denote that the application is finished or if an employee is filling out a multi-step workflow, you may need to push them to the next step.

If an employee needs to fix or update anything they entered on their application, you will need to unlock the application step by selecting the  next to the application step and choosing 'Unlock Step':



To move them to the next step, select the  button in the upper right.

To reject an application, select the  next to the application name and choose 'Reject Workflow'. You will be asked to enter a reason for the rejection:



To finish an application, select the  button in the upper right.

## Related Articles