

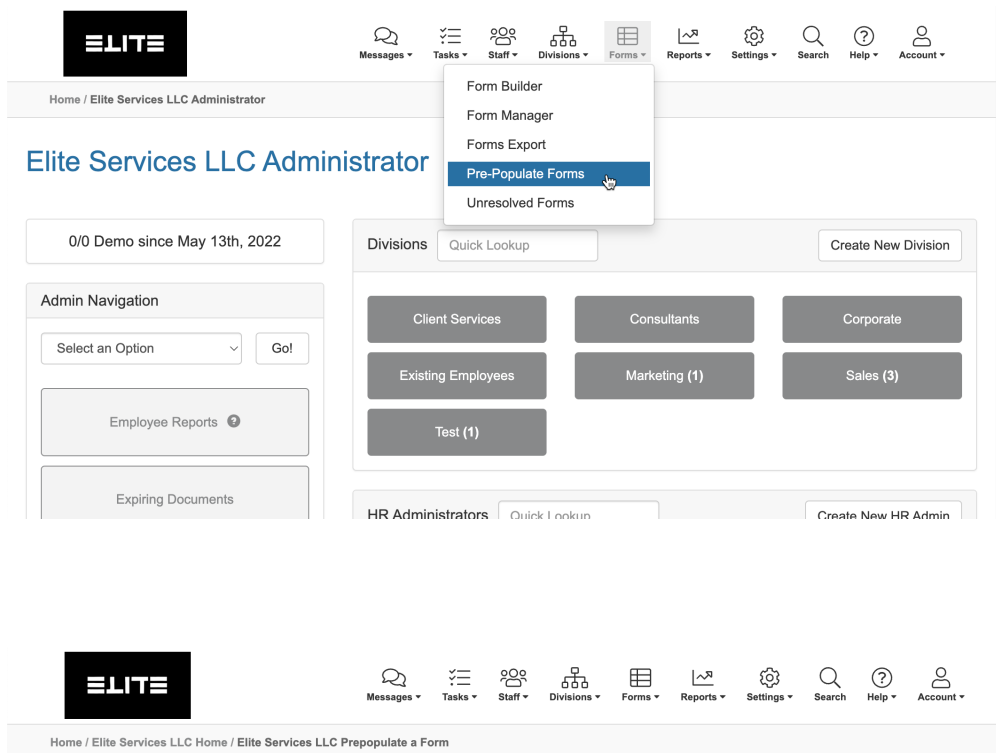
Pre-Populate Form Information

Introduction

How to pre-populate form information to save time when approving forms.

STEP 1

From the home screen, go to Forms, then Pre-Populate Forms.



Elite Services LLC Prepopulate a Form

Pre-populating Your Company's Forms

Select Division:

Company Wide

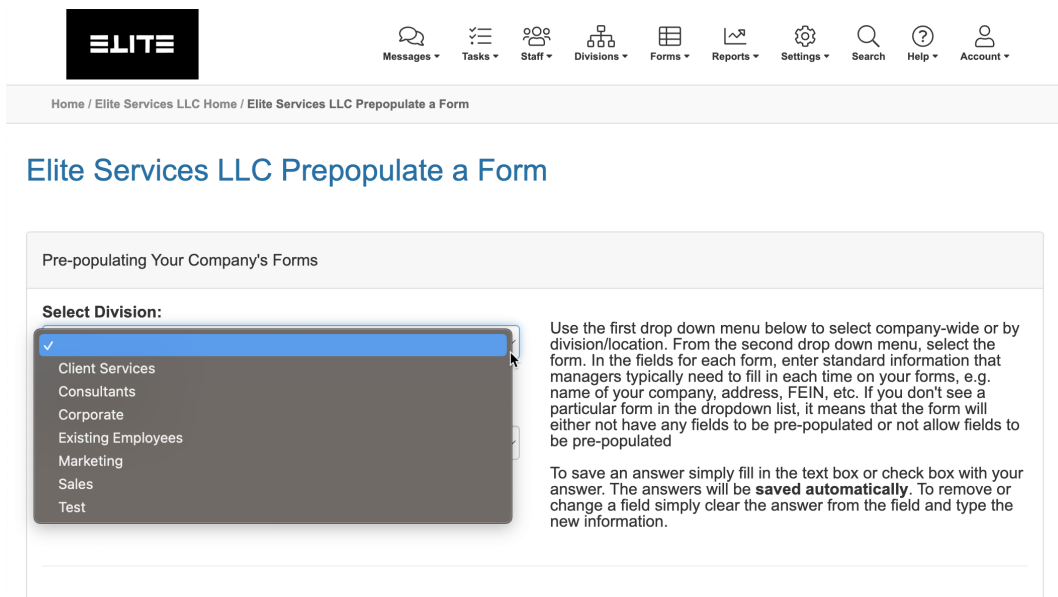
Choose a Form:

Use the first drop down menu below to select company-wide or by division/location. From the second drop down menu, select the form. In the fields for each form, enter standard information that managers typically need to fill in each time on your forms, e.g. name of your company, address, FEIN, etc. If you don't see a particular form in the dropdown list, it means that the form will either not have any fields to be pre-populated or not allow fields to be pre-populated

To save an answer simply fill in the text box or check box with your answer. The answers will be **saved automatically**. To remove or change a field simply clear the answer from the field and type the new information.

STEP 2

If your divisions need to have different information populated, select a division from the drop down menu.

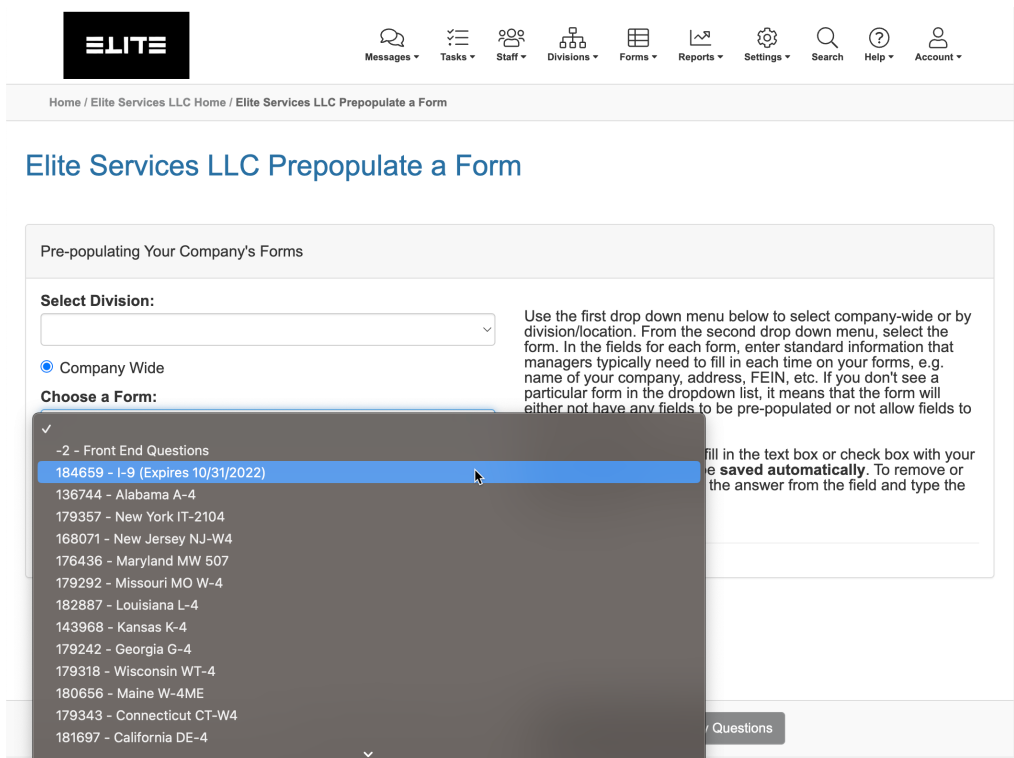


The screenshot shows the top navigation bar with the ELITE logo and icons for Messages, Tasks, Staff, Divisions, Forms, Reports, Settings, Search, Help, and Account. Below the navigation bar is a breadcrumb trail: Home / Elite Services LLC Home / Elite Services LLC Prepopulate a Form. The main heading is "Elite Services LLC Prepopulate a Form". The content area is titled "Pre-populating Your Company's Forms". It features a "Select Division:" dropdown menu with a list of options: Client Services, Consultants, Corporate, Existing Employees, Marketing, Sales, and Test. The "Client Services" option is selected. To the right of the dropdown, there is instructional text: "Use the first drop down menu below to select company-wide or by division/location. From the second drop down menu, select the form. In the fields for each form, enter standard information that managers typically need to fill in each time on your forms, e.g. name of your company, address, FEIN, etc. If you don't see a particular form in the dropdown list, it means that the form will either not have any fields to be pre-populated or not allow fields to be pre-populated". Below this text is another instruction: "To save an answer simply fill in the text box or check box with your answer. The answers will be **saved automatically**. To remove or change a field simply clear the answer from the field and type the new information."

STEP 3

If the form is not specific to a division, leave the "Company Wide" checked.

Choose which form you would like to pre-populate information from the drop down.



The screenshot shows the same top navigation bar and breadcrumb trail as in Step 2. The main heading is "Elite Services LLC Prepopulate a Form". The content area is titled "Pre-populating Your Company's Forms". It features a "Select Division:" dropdown menu which is currently empty. Below it, the "Company Wide" radio button is selected. To the right of the radio button, there is instructional text: "Use the first drop down menu below to select company-wide or by division/location. From the second drop down menu, select the form. In the fields for each form, enter standard information that managers typically need to fill in each time on your forms, e.g. name of your company, address, FEIN, etc. If you don't see a particular form in the dropdown list, it means that the form will either not have any fields to be pre-populated or not allow fields to be pre-populated". Below this text is another instruction: "Fill in the text box or check box with your answer. The answers will be **saved automatically**. To remove or change a field simply clear the answer from the field and type the new information". The "Choose a Form:" dropdown menu is open, showing a list of forms: -2 - Front End Questions, 184659 - I-9 (Expires 10/31/2022), 136744 - Alabama A-4, 179357 - New York IT-2104, 168071 - New Jersey NJ-W4, 176436 - Maryland MW 507, 179292 - Missouri MO W-4, 182887 - Louisiana L-4, 143968 - Kansas K-4, 179242 - Georgia G-4, 179318 - Wisconsin WT-4, 180656 - Maine W-4ME, 179343 - Connecticut CT-W4, and 181697 - California DE-4. The "184659 - I-9 (Expires 10/31/2022)" option is selected. A "Questions" button is visible at the bottom right of the form selection area.

STEP 3

Fill any of the fields that you would like to populate automatically on the forms.

The fields will save automatically once filled and a green checkmark will appear next to "Current"

You can update these for any form from the drop-down.

Elite Services LLC Prepopulate a Form

Pre-populating Your Company's Forms

Select Division:

Company Wide

Choose a Form:

179508 - Federal W-4 - 2022

Use the first drop down menu below to select company-wide or by division/location. From the second drop down menu, select the form. In the fields for each form, enter standard information that managers typically need to fill in each time on your forms, e.g. name of your company, address, FEIN, etc. If you don't see a particular form in the dropdown list, it means that the form will either not have any fields to be pre-populated or not allow fields to be pre-populated

To save an answer simply fill in the text box or check box with your answer. The answers will be **saved automatically**. To remove or change a field simply clear the answer from the field and type the new information.

Name of Employer (for Federal W-4):

Elite Services LLC

Current

Clear Answer

Full Address of Employer (for Federal W-4):

123 No Name Street, New York, New York 12345

Current

Clear Answer

Employer Identification Number (for Federal W-4):

111223333

Current

Clear Answer

First Date of Employment:

Current

Clear Answer

Save All