

## Sending 2-Stage Packets

### Introduction

How to initiate a second packet of forms for your employee.

### STEP 1

From the employee folder, select "Edit" in the Employee Information Section.

Home / Elite Services LLC Home / Divisions / Client Services / Current Employees / Minnie Mouse's Employee Folder

### Minnie Mouse's Employee Folder

Select a Different Employee ▾

Employee Info Documents Tasks Onboarding Checklist Credentials Trainings Notes

Employee Information **Edit**

**Contact Information**  
123  
111@nomail.com

**Division**  
Client Services

Select an Action to Take ▾

Employee Status

**Status: Active**

**Deactivate**

100

Date Created	June 21, 2021 @ 3:16:00 PM
Date Activated	August 23, 2021
Latest Activity	October 24, 2022
Forms Assigned	1
Forms Submitted	1
Forms Approved	1

Employee Forms

Display: Current Forms ▾

Form Name	Submitted	Latest Update	Status	Take Action	Print
Employee Personal Information 2b (+1)	07/22/2022 @ 5:11 PM	10/24/2022 @ 3:05 PM	Approved	<a href="#">View</a> <a href="#">Manage</a>	<input type="checkbox"/>

Print: Approved Forms ▾ [Go!](#)

[Need Help? Search the FAQ here](#) [Go](#) [Common Division Questions](#)

## STEP 2

Scroll down to the form selection box and add the 2nd stage of forms you want to add. You may also remove access to their completed forms in this step so they don't re-do them accidentally.

Click "Update"

Home / Elite Services LLC Home / Divisions / Client Services / Elite Services LLC - Edit Employee Account

**Basic Information**

Last Logged In: No Login History

First Name: Minnie

Last Name: Mouse

Email Address: 111@nomail.com

**Account Information**

Division: Client Services

Username: 111@nomail.com

Manually Update Password Regenerate & Send Password

Select the Forms You Would Like to Make Available to the Employee  
The designated division's default forms have already been selected

<input checked="" type="checkbox"/>	<b>ADP Direct Deposit</b> Allows the employee to directly deposit pay into one or more accounts.
<input checked="" type="checkbox"/>	<b>Background Check Authorization</b>
<input checked="" type="checkbox"/>	<b>EEO Employee Information 2 (Race/Gender)</b> EEO Employee Information 2 (Race/Gender)
<input checked="" type="checkbox"/>	<b>Employee Personal Information 2b</b>
<input checked="" type="checkbox"/>	<b>Federal W-4 - 2022</b> Calculates income withheld for federal taxes.
<input type="checkbox"/>	<b>ADA: Request for Reasonable Accommodation</b>
<input type="checkbox"/>	<b>ADP Direct Deposit 2</b> Allows the employee to directly deposit pay into one or more accounts.

Selected To Top check/uncheck all

Update!

## STEP 3

The employee will need to be notified that there are additional forms to submit. You can do this by sending them a message from the system, or email, phone, or in person.