

## Setting your Form Packet

### Introduction

We will walkthrough how to set your form packet in your division, and how to change/update as needed.

### STEP 1

From your Home page, choose Divisions and Manage Divisions.

The screenshot shows the 'Elite Services LLC Administrator' dashboard. The top navigation bar includes 'Messages', 'Tasks', 'Staff', 'Divisions', 'Forms', 'Reports', 'Settings', 'Search', 'Help', and 'Account'. The 'Divisions' menu is open, showing 'Add New Division' and 'Manage Divisions' (highlighted with a mouse cursor). The main content area shows a 'Divisions' section with a 'Quick Lookup' bar and a 'Create New Division' button. Below this are buttons for 'Client Services', 'Consultants', 'Corporate', 'Existing Employees', 'Marketing (1)', 'Sales (3)', and 'Test (1)'. There is also an 'HR Administrators' section with a 'Quick Lookup' bar and a 'Create New HR Admin' button, listing users like John Test, Denise Kasanicky, Stephanie Mitchell, and Celeste Bosch. At the bottom, there is a 'Need Help? Search the FAQ here' button and a 'Common Company Questions' button.

### STEP 2

Select "Edit" for the division that you would like to set or update the packet for.

The screenshot shows the 'Manage Divisions' page. The top navigation bar is the same as the previous screenshot. The main content area shows a 'Divisions in Elite Services LLC (7)' section with a 'Create a New Division' button. Below this is a table with the following data:

ID #	Division (click to manage)	Date Created	Date Deactivated	Edit	Delete
25085	Client Services	05/13/2021		Edit	Delete
30628	Consultants	12/08/2022		Edit	Delete
25888	Corporate	08/23/2021		Edit	Delete
26523	Existing Employees	10/06/2021		Edit	Delete
25084	Marketing	05/13/2021		Edit	Delete
25674	Sales	07/21/2021		Edit	Delete
25070	Test	05/13/2021		Edit	Delete

At the bottom of the table, there is a 'Save Changes' button. Below the table, there is a 'Need Help? Search the FAQ here' button and a 'Common Company Questions' button.

## STEP 3

From the division page, scroll down until you see the Pre-selected Form Packet section.

If there is no current form packet set, you will see a red alert notifying that there is no packet set for that division.

The screenshot shows the 'HR Staff - Elite Services LLC, Consultants' page. The 'Pre-selected Form Packet' section is highlighted with a red bracket. It contains a red alert message: 'The Consultants division does not currently have any Pre-Selected Form Packet. Until the pre-selected forms packet has been set, the default setting for all new users will be to include all currently active forms. If you would like to set the default to be no available forms, just click the 'Update Pre-Selected Form Packet' button without selecting any forms from the list of options.' Below the alert, there is a list of forms with checkboxes. The first form is 'ADA: Request for Reasonable Accommodation' with an unchecked checkbox. At the bottom right, there are two buttons: 'Cancel' and 'Update Pre-Selected Form Packet'.

## STEP 4

Check the forms that you would like to be assigned as default for this division.

Once complete, select "Update Pre-selected Form Packet"

The screenshot shows the 'HR Staff - Elite Services LLC, Consultants' page. The 'Pre-selected Form Packet' section is highlighted with a red bracket. It contains a list of forms with checkboxes. The first form is 'ADA: Request for Reasonable Accommodation' with an unchecked checkbox. The second form is 'Washington DC D-4A Certificate of Nonresidence' with a checked checkbox. The third form is 'Washington DC D-4 Resident Withholding' with a checked checkbox. The fourth form is 'Basic Employee Information' with an unchecked checkbox. The fifth form is 'Employee Personal Information 1' with a checked checkbox. The sixth form is 'HL Employee Personal Information 1' with an unchecked checkbox. The seventh form is 'Personal Information 1b' with an unchecked checkbox. At the bottom right, there are two buttons: 'Cancel' and 'Update Pre-Selected Form Packet'.