



# DocCenter 3 User Manual

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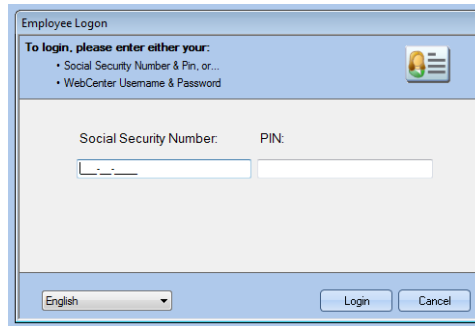
TempWorks DocCenter paperless document management system captures form data and signatures electronically for all of your on-boarding requirements. W-4's, I-9's and other forms that require data entry, signatures and storage are automatically completed and stored, requiring little effort from staff, clients or employees.

This manual is designed for the set up and use of DocCenter **AFTER** it has been installed on all necessary machines for your company.

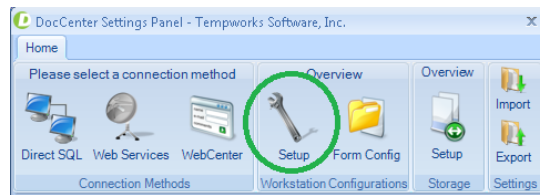
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## Doc Center Set Up

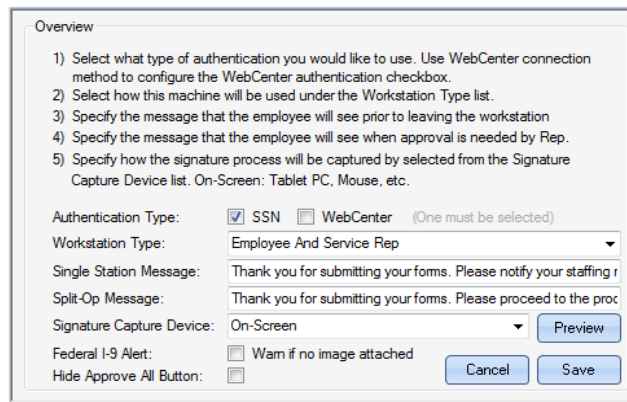
To access the Doc Center Set Up:



When the Logon form appears use your keyboard to enter the key combination of **Ctrl + Shift + S**. This will open the DocCenter Setting Panel. Click on Setup to access the DocCenter set up form:

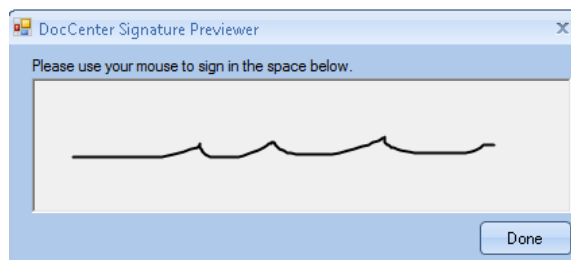


Within DocCenter Setup several of the configurations can be set:



- Authentication Type: Indicate which authentication type you would prefer, both can be selected.
  - SSN will allow the Employee to log in using their Social Security Number and a PIN.
  - Web Center will allow the Employee to log in using the User Name and Password they created when registering in the Online Application.
- WorkStation Type: Indicate what Workstation Type you will be using.
  - Employee Only – should be used if the Employee will be completing their portion of the paperwork at a dedicated machine that will be used only by the Employees.
  - Employee & Service Rep – should be used if both the Employee and the Representative will be using the same machine.

- **Single Workstation Message:** If the WorkStation Type is Employee & Service Rep, indicate the message the Employee should receive when they have completed their forms. This should let the Employee know to notify the Representative that the forms are ready for approval and signatures.
- **Split-Op Message:** If the WorkStation Type is Employee Only, indicate the message the Employee should receive when they have completed their forms. This should let the Employee know to proceed to the designated place where their forms will be approved and signed.
- **Signature Capture Device:** Select the proper Signature device, this will be either On Screen or Signature Pad.
  - **Preview:** By clicking this button you can sample how the Signature will be captured:



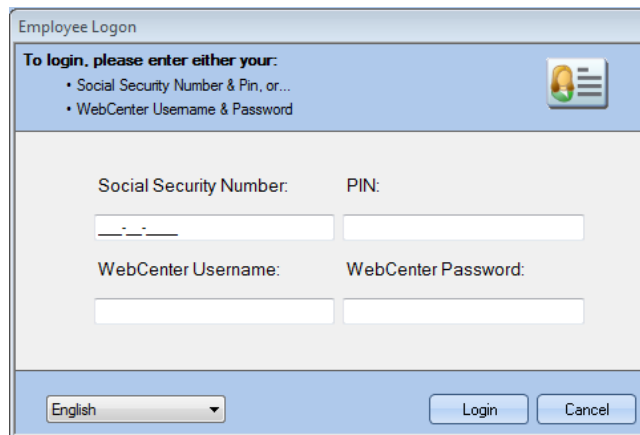
- **Federal I-9 Alert:** Select this if you want a warning message to appear if no documents are attached to the I-9 when it is completed.
- **Hide Approve All Button:** When approving the on-boarding documents within DocCenter, there is the ability to approve all forms at once. If you would like this disabled click this box and each form will have to be approved individually.

Once Setup is complete, click Save. You are now ready to use Doc Center.

## Logging into DocCenter

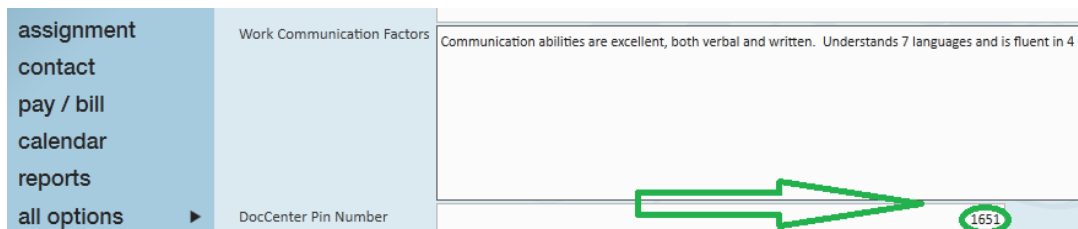
Instruct the Employee to log into DocCenter. They will click on a DocCenter icon to access DocCenter. When the Employee Logon form opens the Employee will log in using either their:

Social Security Number and PIN  
OR  
WebCenter Username and Password  
(Or Both)



The image shows a screenshot of the 'Employee Logon' form. At the top, it says 'Employee Logon' and 'To login, please enter either your:'. Below this, there are two bullet points: 'Social Security Number & Pin, or...' and 'WebCenter Username & Password'. There is a small icon of a person with a document. The form has four input fields: 'Social Security Number:' with a mask '\_\_\_\_-\_\_-\_\_\_\_', 'PIN:', 'WebCenter Username:', and 'WebCenter Password:'. At the bottom, there is a language dropdown menu set to 'English', and 'Login' and 'Cancel' buttons.

The PIN is issued from the Enterprise/Employee/Details/Interpersonal form:

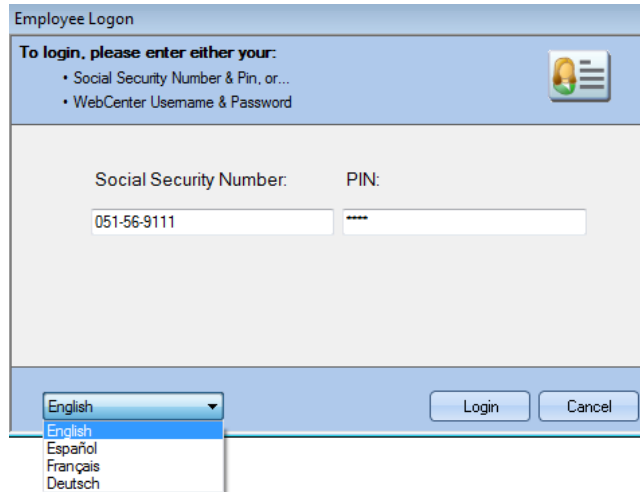


The image shows a screenshot of the 'Enterprise/Employee/Details/Interpersonal' form. On the left, there is a navigation menu with items: 'assignment', 'contact', 'pay / bill', 'calendar', 'reports', and 'all options'. The main content area is titled 'Work Communication Factors' and contains the text: 'Communication abilities are excellent, both verbal and written. Understands 7 languages and is fluent in 4...'. At the bottom, there is a section for 'DocCenter Pin Number' with a green arrow pointing to a field containing the number '1651'.

The WebCenter Username and Password can only be used if the Employee has applied online using TempWorks WebCenter.

## Employee Logon

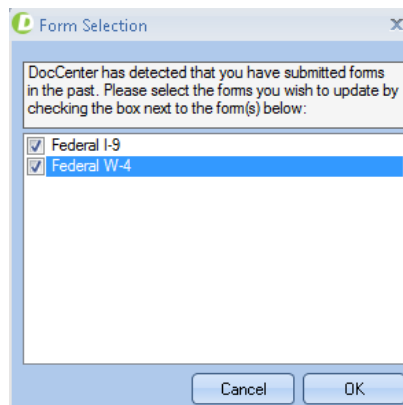
When the Employee is logging into DocCenter, **only if you have documents stored in various languages**, the Employee can select the language they would prefer:



The "Employee Logon" dialog box contains the following elements:

- Title bar: "Employee Logon"
- Instruction: "To login, please enter either your:"
- Options:
  - Social Security Number & Pin, or...
  - WebCenter Username & Password
- Input fields:
  - "Social Security Number:" with a text box containing "051-56-9111"
  - "PIN:" with a text box containing "\*\*\*\*"
- Language selection: A dropdown menu currently set to "English", with a list of options: English, Español, Français, Deutsch.
- Buttons: "Login" and "Cancel".

Once the Employee has logged in the various forms they can fill out will be listed:



The "Form Selection" dialog box contains the following elements:

- Title bar: "Form Selection"
- Message: "DocCenter has detected that you have submitted forms in the past. Please select the forms you wish to update by checking the box next to the form(s) below:"
- Form list:
  - Federal I-9
  - Federal W-4
- Buttons: "Cancel" and "OK".

Depending on how DocCenter is set up specifically for your company, the Employee may or may not be able to select the specific forms to be filled out.

If the forms can be selected, click to place a check mark next to each form to be completed then click OK.

TempWorks DocCenter will gather the selected forms to be completed and signed.

## Employee Submittal of Forms

When the forms appear they will be partially completed based on the information in the Employee's record with TempWorks:

*Please select your citizenship.*

OMB No. 1615-0047; Expires 08/31/12

Department of Homeland Security  
U.S. Citizenship and Immigration Services

### Form I-9, Employment Eligibility Verification

Read instructions carefully before completing this form. The instructions must be available during completion of this form.

**ANTI-DISCRIMINATION NOTICE: It is illegal to discriminate against work-authorized individuals. Employers CANNOT specify which document(s) they will accept from an employee. The refusal to hire an individual because the documents have a future expiration date may also constitute illegal discrimination.**

**Section 1. Employee Information and Verification (To be completed and signed by employee at the time employment begins.)**

Print Name: Last Marshall	First Matthew	Middle Initial D	Maiden Name
Address (Street Name and Number) 33 Dart Road		Apt. #	Date of Birth (month/day/year) 08/14/1983
City Ithaca	State NY	Zip Code 14850	Social Security # 051-56-9111

I am aware that federal law provides for imprisonment and/or fines for false statements or use of false documents in connection with the completion of this form.

I attest, under penalty of perjury, that I am (check one of the following):

A citizen of the United States

A noncitizen national of the United States (see instructions)

A lawful permanent resident (Alien #) \_\_\_\_\_

An alien authorized to work (Alien # or Admission #) \_\_\_\_\_ until (expiration date, if applicable - month/day/year) \_\_\_\_\_

Employee's Signature \_\_\_\_\_ Date (month/day/year) 05/24/2011

There may be required fields or required areas on DocCenter forms. The required fields/areas will be highlighted in Red.

The Employee will complete all of their necessary areas such as the Maiden Name or Citizenship.



The Employee will click **Next** to advance to the next form:

..... Cut here and give Form W-4 to your employer. Keep the top part for your records. ....

Form **W-4** Employee's Withholding Allowance Certificate OMB No. 1545-0074

Department of the Treasury Internal Revenue Service **2010**

Whether you are entitled to claim a certain number of allowances or exemption from withholding is subject to review by the IRS. Your employer may be required to send a copy of this form to the IRS.

1 Type or print your first name and middle initial. Matthew	Last name Marshall	2 Your social security number 051-56-9111
Home address (number and street or rural route) 33 Dart Road		3 <input type="checkbox"/> Single <input type="checkbox"/> Married <input type="checkbox"/> Married, but withhold at higher Single rate. Note: If married, but legally separated, or spouse is a nonresident alien, check the "Single" box.
City or town, state, and ZIP code Ithaca, NY 14850		4 If your last name differs from that shown on your social security card, check here. You must call 1-800-772-1213 for a replacement card.
5 Total number of allowances you are claiming (from line H above or from the applicable worksheet on page 2)	5	
6 Additional amount, if any, you want withheld from each paycheck	6	\$
7 I claim exemption from withholding for 2010, and I certify that I meet both of the following conditions for exemption. • Last year I had a right to a refund of all federal income tax withheld because I had no tax liability and • This year I expect a refund of all federal income tax withheld because I expect to have no tax liability. If you meet both conditions, write "Exempt" here		

Under penalties of perjury, I declare that I have examined this certificate and to the best of my knowledge and belief, it is true, correct, and complete.

Employee's signature \_\_\_\_\_ Date 05/24/2011

(Form is not valid unless you sign it.)

8 Employer's name and address (Employer: Complete lines 8 and 10 only if sending to the IRS.) TempWorks Sales, 3140 Neil Armstrong Bl #Suite 205Eagan, MN 55121	9 Office code (optional)	10 Employer identification number (EIN) 123456789
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For Privacy Act and Paperwork Reduction Act Notice, see page 2. Cat. No. 10220Q Form W-4 (2010)

The Employee should continue this process until all forms have been completed. At which point, the Employee should



click **Submit** to submit their forms.

## Rep Approval of Forms

Once the Employee has filled out and submitted their forms the Representative will complete their portions, complete and approve the forms:

**Section 2. Employer Review and Verification** (To be completed and signed by employer. Examine one document from List A OR examine one document from List B and one from List C, as listed on the reverse of this form, and record the title, number, and expiration date, if any, of the document(s).)

List A	OR	List B	AND	List C
Document title: <input type="text"/>		Drivers License <input type="text"/>		Social Security Card <input type="text"/>
Issuing authority: <input type="text"/>		M654894844 <input type="text"/>		051569111 <input type="text"/>
Document #: <input type="text"/>		<input type="text"/>		<input type="text"/>
Expiration Date (if any): <input type="text"/>		<input type="text"/>		<input type="text"/>
Document #: <input type="text"/>		<input type="text"/>		<input type="text"/>
Expiration Date (if any): <input type="text"/>		<input type="text"/>		<input type="text"/>

**CERTIFICATION:** I attest, under penalty of perjury, that I have examined the document(s) presented by the above-named employee, that the above-listed document(s) appear to be genuine and to relate to the employee named, that the employee began employment on (month/day/year) 05/24/2011 and that to the best of my knowledge the employee is authorized to work in the United States. (State employment agencies may omit the date the employee began employment.)



After each form is completed the Rep should click **Next** until each form has been reviewed, completed and approved.

While reviewing, completing and approving each form, supporting documents can be attached to each form by clicking:



Once all forms have been reviewed, completed and approved they can be submitted for approval by clicking either:



**Approve:** This will allow the Rep to approve each form individually, forcing the Rep to look at each form.

**Approve All:** This allows all forms to be approved at one time, the Rep does not have to view each form.

If Approve All is selected a prompt will appear:

Mass Approval Not Recommended ✕

It is not recommended to approve all forms at once. You should ensure that all data is entered correctly by approving each form individually. Would you like to continue anyway?

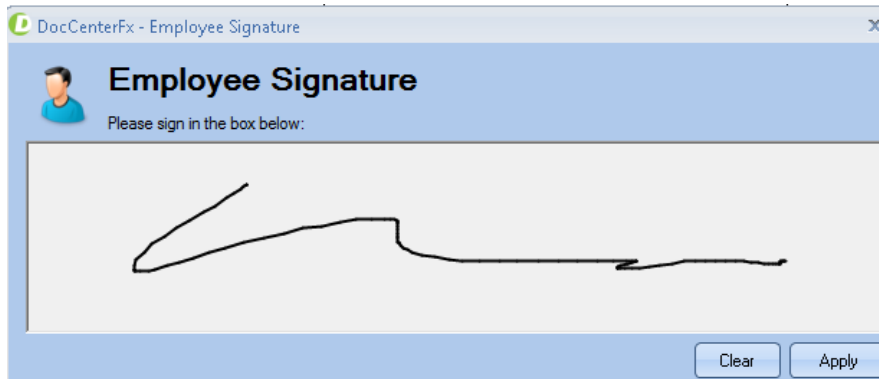
Once forms have been Approved they are Signature ready.

## Signing Forms

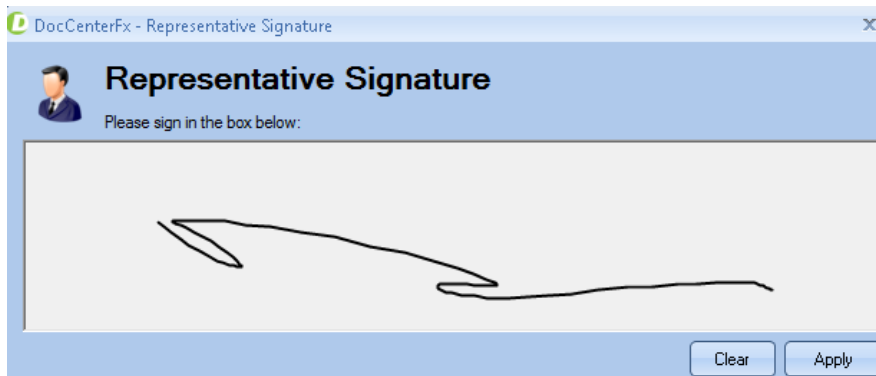
Once all forms have been Approved they are ready to be signed.

A prompt will automatically appear for the Employee and the Rep.

When the prompt appears for the Employee, ask the Employee to use your Signature Device to sign their name:

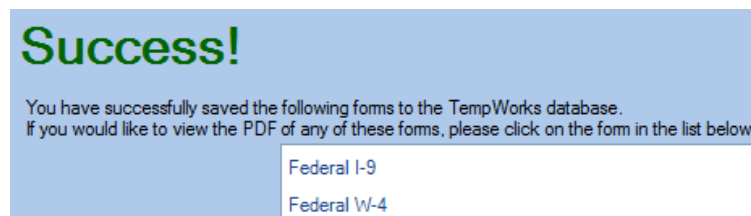


Next the prompt will appear for the Rep, as the Rep, use your Signature Device to sign your name:



These signatures will be applied to all of the forms that were Completed and Approved in DocCenter.

DocCenter will display your success:



Click on any form listed to view that form with the Signatures.

The forms completed in DocCenter will be stored in Enterprise on the Employee record in the Documents area.

Depending on how your version of DocCenter is configured the Employee's record in TempWorks may be updated with the information they completed on their forms.



# DocCenter 3 User Manual

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## Still Have Questions?

For more information about DocCenter contact our Customer Support group at 651-452-0366 or send an email to: [support@tempworks.com](mailto:support@tempworks.com).

To schedule training on DocCenter, submit suggestions on how to improve this document or to request documentation on other Enterprise functionality please contact our Training team at: [trainers@tempworks.com](mailto:trainers@tempworks.com).