# WorkMarket

#### an ADP Company



# **ONBOARDING** A TRAINING GUIDE FOR WORKERS

V 1.0 - Last Update 04/15/19

#### ONBOARDING

We realize that using a new software can be challenging. This onboarding guide is designed to walk you through all the necessary steps for being able to complete work and get paid.

#### **FIRST LOGIN**

After you've registered, learn more about accessing your account and navigating the dashboard.

#### **FINANCE**

Learn more about tax information, documentation and setting up accounts to withdraw your earnings.

#### **MOBILE**

Learn more about downloading our mobile app and what features are available while you're on the go.

#### **NOTIFICATIONS**

Learn more about configuring your platform notifications.

#### LABOR CLOUDS

Learn more about labor clouds and how to join them.

#### **ASSIGNMENTS**

Learn more about the assignment dashboard and lifecycle.

#### **YOUR PROFILE**

Learn more about your worker profile and how to update it.

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# FIRST LOGIN

## First Login - Confirmation Email



Upon registering, you will receive a confirmation link to your email. This link validates that your email is active and functioning. You must follow this link in order to login, otherwise you will receive an error. If you do not see a link in your inbox within a minute or so after registering, please check your spam as these automated messages will occasionally get marked in error.



## First Login - Labor Cloud Invitation

In addition to the confirmation email, you will also receive a labor cloud invitation email. Labor clouds help clients organize their freelancers based on the type of work they do. They also help confirm that each one meets all of their requirements to work. You will need to confirm your email and login to the platform before you're able to follow the link in the labor cloud invitation. We'll discuss this in more detail shortly.



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Once you have followed the confirmation link and logged into your account, you will be prompted to complete 3 onboarding steps. These steps are designed to help complete your profile by collecting basic information about you and your skill set. All of the information you provide in these steps can be modified at any time.



Profile Informati	on	
Profile Information	Location Work Categories Donei	
	First Name * Last Name *	_
60	Email Address * Cyndoe@gmail.com	
ADD PHOTO	Phone Number * Country LISA (+1) (212) 555-1234	
	CONTINUE	

First, you will be asked to provide some basic contact information. This will include your name, email and phone number. You can also upload a picture in this step.





First, you will be asked to provide some basic contact information. This will include your name, email and phone number. You can also upload a picture in this step.

Next, you will be asked to provide your location. Please note, you will need to enter your <u>full address</u> as it appears in Google. This allows the system to provide you with the most precise results. We recommend entering your postal code and selecting the corresponding city/state from the dropdown. You can then enter your street address and select from the menu.





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The expertise step will request basic information about your professional experience. You will be asked to select your industry, provide a job title and select up to 10 skills. Please note, you do not need to select from our menu of job titles and skills, you can provide your own.



Great! You are now ready to search and apply for assignments.

A few tips before you get started:

- Complete your banking information so you can withdraw your funds
- Complete your tax information so you can get get paid for assignments
- Add additional skills to your profile to become eligible for more assignments

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BACK		CONTINUE

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At this point, you've completed your onboarding steps and will now be granted full access to your account. You can change the information you've provided at any time. This final prompt provides links to the next tasks to be completed - your tax information and bank information.

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# FINANCE

#### Finance - Tax Information

Each user is required to provide tax information prior to withdrawing any payments. Each tax season, WorkMarket will provide you with an earnings report and a 1099-MISC (when applicable). Requiring verified tax information ensures that we have the necessary information to issue you these documents.



#### **Finance - Tax Information**

#### Tax Information

If you earn income on the WorkMarket Platform, we are required by law to report your earnings to your tax authority. You must provide your tax information in order to have constructive receipt and to withdraw funds from your account. If you need more information, please view **IRS WP Instructions** 

How do you report to your tax authority?	<ul> <li>As a business</li> <li>As an individual</li> </ul>		
Which country do you reside in?	United States	\$	
* Social Security Number	999-99-9999		
* First Name			
	As shown on your income tax re	turn	
Middle Name	An observe on your income toy inc	do invest i	
	Po anown on your moonie lax re	NUT .	
* Last Name			
	As shown on your income tax re	Rum	
* Address			
	Number, street, and apt. or suite	no.	
* City			
* State	- State -	\$	
* Zip Code			
* Federal Tax Classification	Individual / Sole Proprieto	r	
Do you have a business nam above such as a "doing busi	e or disregarded entity name t ness as (DBA)* name?	hat is different tha	n the name that you provided
(	Yes  No		
-	Contrast of the Contrast Table		

Please select how you'd	Receive documents electronically
like to receive your tax	Receive paper versions to the address I have provided in WorkMarket
documents.	Settings.

SUBMIT

Tax information is only required for workers located in the US and Canada. Please note, tax information takes about **2-4 business days to verify** and may be updated at any time after it has been returned as rejected or verified. The system will create a W9 for you each time you update your tax information which will be available to download under the <u>Tax</u> <u>Documentation</u> section or mailed to you at the provided address.

> To update your tax information, <u>click here</u>

## Finance - Payment Accounts

Once you have provided tax information, you can add a financial account to withdraw your funds. WorkMarket offers 3 payment account options to users located in the US & Canada -

- Bank Account
  - Must be verified through confirmation of 2 small deposits, takes 2-3 business days to complete
  - Takes 2-3 business days for funds to clear after transfer
- PayPal
  - \$1 transfer fee
  - Funds will be available the same day if transferred before cut-off
- WorkMarket Visa
  - Only account with an auto-withdraw option
  - Funds will be available the same day if transferred before cut-off

For those users located outside of the US & Canada, you may use either PayPal or Hyperwallet. For more information about Hyperwallet, <u>click here</u>.

ethod	Account	Туре	Country	Status	Action
ork Market Visa Card estions? Call 866-395-9200	WM Car	d Visa Card	USA	Active automatic withdrawal: Off	How to Deactivate

## Finance - Payment Center

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WorkMarket provides you with a payment center to easily track your earnings and withdrawals. In order to withdraw your earnings, you will need verified tax information and a verified financial account. Continue reading to learn more about how payments work.



#### Finance - Payment Center



Past Due Receivables - refers to any invoices that have not been paid and the scheduled due date has passed
 Current Receivables - refers to any invoices that are coming due, but have not reached their due date
 Contractor Earnings - refers to the total amount of payments you have withdrawn within the current calendar year
 Available to Withdraw - refers to payments you have been paid, but have not yet withdrawn

**NOTE:** All invoices are the responsibility of the client to pay.

To view your Payment Center, <u>click here</u>

#### Finance - Withdrawing Funds



To view your transaction history, click "Contractor Earnings" to access your payment ledger. Any pending transactions will show up at the top. All other payments and withdrawals will show up as they would in a bank statement. For your convenience, this information can be exported to a csv. Please note, we process all transfer requests around <u>4pm</u> EST Monday-Friday.

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# MOBILE

#### Mobile

For your convenience, WorkMarket offers a mobile application for both iOS and Android devices. The following actions can be completed using the app -

- Applying for assignments
- Updating and completing assignments
- Withdrawing funds
- Updating your profile

Please note, all screenshots contained within this guide are from the desktop site **<u>not</u>** the mobile application.



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# LABOR CLOUDS

## Labor Clouds

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As mentioned earlier, upon registration, you will receive an invitation in your email to join a labor cloud. You may follow the link in the email or access the labor cloud through your notification dropdown within the platform

Clients create labor clouds to connect with talent about their potential opportunities relevant to the talent's experience and skill set. Many times, they will route their assignments directly to labor clouds, so membership will be key to receiving the latest opportunities.



## Labor Clouds

Overview



This labor cloud is for break/fix technicians. We will be paying hourly and can be negotiated.



Block AcmeCo Report a Concern

07/20/2018

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MEMBERS

You do not meet all the requirements for joining this Labor Cloud, but you can apply anyway.

You will apply as an individual worker.

You we

DEC

Industry Focus:

Managed by: Jake Moorcott AcmeCo

DEMO

Stats

CREATED

Technology and Communications

Labor Cl

About

Many times, the labor cloud will have certain requirements you must meet in order to join. Click the link next to the requirement listed in red to complete the requirement. Once the requirements have all been met, click "Apply" in the upper right corner.

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# NOTIFICATIONS

#### Notifications

WorkMarket offers several options for notifications, each include customizable settings allowing you to select what you receive alerts about. Options include email, dashboard, push and SMS notifications.

Notification Settings				
Worker Assignment Notifications	⊠ Email	¶⊄ Notification	D Push	SMS
General Assignment Settings				
Invites to take on assignments				
Assignment not available				
Appointment set				
Assignment approved for payment				
Assignment completed on your behalf				
Rating added to assignment				
Question answered				
Attachment added				
Deliverable rejected				
Deliverable late				
Assignment updated				
Note added				
Assignment cancelled				
Alert status change				
Status change				
Reminders				
Reminder to confirm				
Reminder to check in				
Reminder to submit deliverable(s)				
Requests and Approvals				
Budget change added				
Budget request approved/declined				
Bonus added				
Bonus request approved/declined				
Expense added				
Expense request approved/declined				
Negotiation approved/declined				

#### Notifications

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Push

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## ASSIGNMENTS

#### Assignments



Assignments are the core function that allows you to interact with clients within WorkMarket. Clients route assignments to you to provide the following information -

- Scope of work
- Scheduling
- Pricing
- Documents

Through each assignment, you can log your hours on site, communicate with your client and provide all deliverables required for payment. Each individual assignment is a contract of work and will move through a variety of stages as you complete your work.

Macy's Installation in NE Akimbo	Available	Jan 26 08:00 AM EST	Farmingdale, NY 11735	\$0.91
Candidates: Kathryn Internal Owner: James Hughes				
Apply				Assign. ID: 5235246018

## Assignments - Dashboard

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Your "My Work" dashboard is the command center for all of your work. You will be able to view your assignment invitations, as well as all completed assignments from this view. Using a variety of filters and sorting options, you can easily locate and view any assignment associated with your account.

=	work market								۹	Q	
-	Talent Profile My Profile Tests	My Work					SYNC .	TO CALENDAR			
	Labor Clouds	Keyword Search			Show	10	Sort by:	Updated Date	\$	* *	
	worker Services	Search my assignments	Server Swap - First Bank - Hunti	Active	Apr 08 12:00	Huntington,	NY \$1.00				
<b></b>	Work	Date Filter	Fechnologies		PM EDT	11743					
	My Work	Scheduled Date \$	FASTFUNDS ELIGIBLE DELIVERABLE LATE	WORKER CONFIRME	D WORKER LAT	E					
	Find Work Calendar	Custom Range							Assign. ID: 58050	625442	
	Ratings		Test on completed	Complete	Mar 08 04:00 PM EST	\$66.88					
₫	Payments	Advanced filters	Internal Owner: Sandbox Admin Report ID#: 123								
	Overview	Any Internal Owner							Assign. ID: 2577	741102	
Ι	Accounts	All Bundles	Test Budget Assignment	Active	Mar 18 02:00 PM EDT	\$93.77					
~	Reports Overview	Any Assigned Worker	Internal Owner: Sandbox Admin PAYMENT STOPPED								
	New Report	Any Assigned Vendor	Report ID#: 33333								
		0							Assign. ID: 95972	261247	
		Assigned to me	Test - Disable Negotation	Active	Feb 27 09:00 AM EST	\$119.27					
		Show more filters   Clear filters	Internal Owner: Sandbox Admin Report ID#: ABC								
		Statuses							Assign. ID: 48480	075201	
		All Alert	2 Test for Kristina @ WM - DiData	Available	Feb 15 09:00 AM EST	\$1.00					
		Available 1 Assigned 3	Internal Owner: Adrienne AUTO ASSIGN FASTFUNDS ELIGIBLE								
		Pending Approval	Accept						Assign. ID: 33482	240613	
			Updated Apr 25, 2019 at 10:44 AM						< 1 o	f1 >	Q

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## Assignments - Lifecycle

Each assignment goes through a series of different statuses before it can be paid. You can view the current status of any of your assignments by opening the assignment and looking in the orange status box in the upper right hand corner. The basic statuses include -

- Sent/Available You have been invited to the assignment, but have not yet been selected to complete it
- Assigned You have been selected and assigned to complete the assignment
- In Progress You have started the work and uploaded some of the required deliverables for approval
- **Pending Approval** You have completed the work and submitted all documentation and deliverables to the client for review and approval for payment
- **Invoiced** The assignment payment terms have started and you are now awaiting payment as indicated by the scheduled payment date
- Paid You have been paid for your services and the assignment is now closed





# YOUR PROFILE

#### Your Profile



Your profile allows you to provide information about your skills and professional experience. While some of the information is gathered upon your first login, you choose to provide further details or modify existing information at any point. Information you choose to include could be -

- Skills & tools you have
- Products you work with
- Certifications, Licenses or Insurance

In general, any information you feel will help you get the job can be displayed somewhere on your profile.

	work market	
Ŵ	Work Assignments New Assignment	Abe Johannson Switching Witching Witchi
	Contact Manager	🗥 원 🔊 🛡 📀 🕸 📲 🚳 354isfaction 97%
	WorkUpload™ Realtime	Overview Qualifications Ratings Comments Tags D Media
	Talent Find Talent Labor Clouds Recruiting Tests Surveys	User ID: 46787255 Since: Aug 2015 Paid Assign Au Tri6 URI: https://www.workmarket.com/profile/46787255 Tax information: Unverified Cancelled 4 6 Bank Account: Unconfirmed Abandoned 5 6 in Linkedon <u>On-Time 94%</u>
< E	Payments Overview Requests Add Funds Accounts Reports Dashboard New Report All Reports	There is great range of skills SEE BATTINGS Labor Clouds Vour Public Labor Clouds War Public Labor Clouds Lab
		Tests
		Dell Compellent Certified Technicians Passed (75%)
		Independent Contractor (IC) Compliance Questionnaire Passed (100%)
		Advanced Security Test Failed (0%)
		Experienced AV Test Failed (0%)

#### Your Profile - Updating



For more information, please visit our <u>Help Center</u>

For Support, please call 212-229-WORK (9675) option 3