

How to add a staff member

Last Modified on 09/02/2026 12:17 pm EDT

Staff records are for people on payroll or contract, not volunteers.

Steps

- Go to HR or Staff in the main navigation.
- Click Add Staff or New Staff Member.
- Enter the person's name, work email, role or title, start date, and manager if you have one.
- Save.

Once the record exists, you can attach onboarding tasks, time-off, reviews, and policy acknowledgments to it.

Tip: Search first so you do not create a second record for someone who is already a contact or volunteer.