



PRODUCT REFERENCE

FEATURES & FUNCTIONALITY

Everything JuntosHR does, area by area.

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JUNTOSHR™ FEATURES & FUNCTIONALITY

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JuntosHR is an HR and payroll-prep app for small businesses that don't have an HR department. It covers hiring, onboarding paperwork, e-signatures, schedules, time tracking, pay stubs and tax deadlines, and it gives your employees a simple team app on their own phone. This reference explains what each part of the app does.

01

At a glance

Every feature below is on every plan. Plans differ only in how many businesses you can run under one sign-in.

Feature area	Plan	Status
Sign-up, free trial and guided business setup	All plans	Live
Hiring roadmap (your state's employer checklist)	All plans	Live
Company Setup and required records	All plans	Live
Document library and document generator	All plans	Live
People, employee records and employee folders	All plans	Live
E-signatures in the team app or on your tablet	All plans	Live
Hiring board and job postings	All plans	Live
Interviews and fair hiring scorecards	All plans	Live
Schedules, time clock and timesheets	All plans	Live
Pay your team: pay stubs, withholding, pay history	All plans	Live
Team app for employees (English and Spanish)	All plans	Live
Tax and pay deadlines with email and text reminders	All plans	Live
Accountant view and year-end package	All plans	Live
Termination workflow and final pay	All plans	Live
Access provisioning checklists	All plans	Live
Two-step sign-in and auto-lock	All plans	Live
Several businesses under one sign-in	Depends on your plan	Live

Feature area	Plan	Status
Connect your own AI account	All plans	Coming soon
Send for signature through DocuSign	All plans	Coming soon
Team member logins with roles	All plans	Coming soon

02 Getting started and your account

- Sign up with your email and a password, and use JuntosHR free for 14 days. No credit card is needed.
- A countdown at the top of the app shows the days left in your trial. When it ends, your data stays saved until you subscribe.
- Subscriptions are bought on the Across the Table Stan store. Use the same email you sign in with, and the app unlocks automatically.
- A guided first screen sets up your business: name, industry, business type, owner, entity, city, state, email and phone.
- Your business type can be changed for 14 days, then it locks in. Job descriptions and job boards are matched to it.
- **Try the demo** opens a sample business with nothing saved, so you can explore before you sign up.
- Your workspace saves to your account as you work, so it follows you to any device. If the same account is changed on another device, JuntosHR stops saving and asks you to reload, so nothing gets overwritten.
- Works in your web browser on a computer, tablet or phone, and can be installed on your phone like an app.
- Run several businesses under one sign-in, each with its own people, documents, schedules and pay records, and switch from the top of the sidebar. Plans set how many: One Business (1), Small Team (up to 5), Pro Team (up to 8) and Workgroup (up to 20), all with unlimited W-2 and 1099 workers. **Plan & billing** shows your plan and how many businesses you're using.

03 Hiring roadmap and Company Setup

- **Hiring roadmap** builds a checklist for your state and city in six phases: set up as an employer, find and hire, their first day, every payday, pay your payroll taxes, and quarterly and year-end filings.
- Each step explains why it matters and links to the official government page and the JuntosHR tool that helps. Check steps off and print the checklist.
- **Company Setup** walks through four steps: business profile, required records, choose documents and review.

- Your business details (legal name, DBA, EIN, address and more) fill in every document you generate.
- Required records are added automatically: Form I-9, Form W-4, State New Hire Report and Workers' Compensation Coverage Notice for employees; Form W-9 and Form 1099-NEC for contractors.
- You choose which optional documents go into every new hire's packet.

04 Documents

- **Document library** holds a large catalog of templates, with required-by-law documents separated from optional ones.
- Optional documents cover hiring and agreements, onboarding, policies and handbooks, acknowledgments, payroll, performance and discipline, medical and leave, benefits, compliance and safety, contractor paperwork, business and legal templates, and termination.
- Examples include an offer letter, employee handbook and acknowledgment, at-will acknowledgment, wage and pay rate acknowledgment, independent contractor agreement, booth or chair rental agreement, background check consent, NDA, performance review, written warning, PIP, time-off request and equipment loan agreement.
- Filter by **All**, **Required**, **Optional**, **W-2** or **Contractor**, or search by name.
- The document generator fills a template with your business and one employee's details, or opens a blank template.
- Click any blank to type in it. Your entries are saved and included when you print.
- **Print** or **Save as PDF** any document.

05 People and employee records

- Add W-2 employees or independent contractors with name, role, start date, pay type, pay rate, email and phone.
- Each person's packet is built for you: required documents by worker type, plus the optional ones you pick.
- The **People** list shows everyone with their onboarding progress. Search by name or role, or filter by Everyone, W-2 or Contractors.
- Each record shows required and optional documents with their status, a percent-complete ring, pay setup, deductions, team app access and reporting line.
- **Equipment & tools lent** keeps a list of items you lend (serial number, value, condition, date lent and returned) and links to the Equipment & Tool Loan Agreement.
- **Deductions** records pre-tax items (health, dental and vision, HSA, FSA, 401(k), commuter) and post-tax items (garnishments, union dues, charitable gifts, repayments) per pay period.

- **Org chart** is drawn from each person's **Reports to** setting. You can edit job titles and managers right on the chart.
- **Employee folders** organizes each person's documents into separate files: Personnel, Payroll, I-9, Medical / Confidential, Background Check and Benefits, plus a Termination File and internal HR documents.
- **Export records** downloads your employee roster, document status report and reporting lines as spreadsheets, or a complete backup file.
- **Access provisioning** lets you define what each job title gets on day one (app access, business systems, keys, marketing accounts), flags titles without a template, and lets you mark each person as provisioned. It's a checklist; it doesn't log in to your other systems.
- The **Dashboard** shows people on file, required documents complete, items that need action, things expiring soon, compliance by person, documents awaiting signature and recent signature activity.

06 E-signatures

- **Send to sign on their phone** sends an employee their unsigned documents through their team app.
- Send the message yourself by text, email or copy and paste, or let JuntosHR email or text it for you, with automatic reminders after 2 and 5 days until everything is signed.
- Employees read each document, agree to sign electronically, enter their full legal name, and draw or type their signature.
- Each signature is saved with a record: signer's name, date and time, internet address, device and a fingerprint of the document. The record shows and prints under the signed document.
- **Send reminder** includes only the documents not yet signed.
- Form I-9, W-4 and W-9 are never signed inside the app. The team app links employees to the official government form. The State New Hire Report stays with you to file.
- Sign in person instead: hand your tablet to the employee with **Sign on this tablet**, or mark a returned paper copy as signed.

07 Hiring and interviews

- **Hiring board** keeps your open positions with a status of Hiring, Paused or Filled, and how many job boards each is posted on.
- Add roles written for your business type, roles every business needs, roles from other industries, or a custom position.
- Edit the title, worker type, schedule, pay, openings, how to apply, the role summary, duties, requirements and nice-to-haves, with a live preview.

- **Copy posting** copies a ready-to-paste job ad. **Where to post** lists job boards that fit your industry plus the big job sites and free local ideas, with a **Posted** checkbox for each.
- **Interviews & fair hiring** scores every candidate the same way: must-have checks, application ratings, and the same interview questions rated 1 to 5.
- Candidates are ranked with an overall score (30% application, 70% interview) and a label like Strong hire, Hire, Consider or Not a fit. Anyone missing a requirement is flagged.
- **Hide names while scoring** replaces names with Candidate A, B and so on.
- **What you can & can't say** lists topics to avoid and what you can ask instead. Notes that seem to mention a personal or protected trait get a warning.
- JuntosHR never asks for, stores or scores race, color, religion, national origin, age, sex, pregnancy, sexual orientation, gender identity, disability or genetic information. Only a candidate's name is stored.

08 Schedules, time clock and timesheets

- **Schedules** shows a weekly calendar. Add, edit or delete shifts, copy last week, print the week, and see scheduled hours and estimated hourly pay.
- **Publish week** makes the schedule visible in your team's app. Unpublished weeks stay private.
- **Time clock** shows everyone who clocks in, with clock in, start break, end break and clock out buttons, plus who's on the clock, on break and scheduled but not in yet.
- **Timesheets** shows regular and overtime hours for each person by pay period, with flags for missed punches and breaks.
- Fix or add time with a reason. Edited times are marked "Edited" and need approving again.
- Approve hours one person at a time or all at once, and download the period as a spreadsheet.
- Overtime is counted per workweek: hours over 40 at time and a half for anyone set to get overtime.

09 Pay your team

- **Pay setup** sets your pay schedule (weekly, every two weeks, twice a month or monthly), payday and workweek start.
- Set how each person is paid: hourly, salary, the same amount each period, commission or per-service only, or not paid through JuntosHR (for example, a booth renter).
- Set how you send money: check, Cash App, Venmo, PayPal, Zelle, cash, bank transfer or other.
- Federal income tax can be figured automatically from an employee's W-4 answers (2020-or-later and 2019-or-earlier forms), or set as an amount or percent.
- State income tax is a percent or dollar amount you set from your state's form. Social Security and Medicare are figured for you.

- Warnings appear if someone's pay is below your state or city minimum wage. Tipped minimum wage is supported where your state allows it.
- Paid sick time can follow your state or city law, your own policy, or be turned off. Sick time is earned from hours on each pay stub, and balances show on stubs and in the team app.
- **Pay this period** turns approved hours into pay stubs. Add commission, tips, cash tips already kept, bonus, sick hours used, other pay and reimbursements.
- When you pay, JuntosHR can open Cash App, Venmo or PayPal with the amount filled in, or gives you the amount to copy. Then you record it, and the stub locks.
- Totals show what you pay your team, the taxes you withheld, and your share of Social Security and Medicare.
- **Pay history** lists every recorded stub by year and person, with quarter totals for employees and contractor totals (with a note when a contractor reaches the 1099-NEC amount). Download it as a spreadsheet.
- JuntosHR figures pay and keeps records. It does not send money, deposit taxes or file tax forms.

10 Team app for employees

- Employees open a private link and a 6-digit PIN. No account or password is needed.
- **Clock:** clock in and out, start and end breaks, see hours this week, next shift, recent time and sick time available.
- **Schedule:** see upcoming published shifts.
- **Pay:** view pay stubs after payday, then print, save as PDF or email them.
- **Documents:** read documents, sign the ones marked **Sign now**, and get links to official government forms.
- Switch between English and Español. Owners can set each employee's language on their record. The documents themselves stay in English, with a note to ask before signing.
- Owners can preview the employee's view, make a new PIN or turn access off.

11 Tax deadlines and reminders

- **Tax deadlines** lists federal dates (deposits, Form 941, FUTA and Form 940, W-2 and W-3, 1099-NEC), state dates (unemployment, withholding on the schedule you choose, year-end, new-hire reports), local reminders, deadlines you add, and your paydays.
- Weekend and holiday dates move to the next business day.
- View the next 90 days, the full year, or what's been paid or filed.
- Confirm each date with **I'm aware**, then **Mark paid / filed** with the date and a confirmation number.

- A banner on every screen and a Dashboard card appear when something is due within 14 days or past due.
- **Record** keeps every alert, confirmation and payment with the date, time and who did it, and downloads as a spreadsheet.
- Email reminders, and text reminders after you verify your cell number, can go out 2 weeks, 1 week or 3 days before, the day before, on the day, and the day before payday. Marking a deadline paid or filed stops its reminders.
- Final paycheck due dates from the termination workflow and upcoming minimum wage changes are added to the list.
- Before the pay and tax tools open, you agree to double-check every amount and that you're responsible for your taxes and wages. The dated agreement is kept, and **Tell Across the Table** reports anything that looks wrong.

12 Accountant view and year-end

- Give one accountant or bookkeeper a private, view-only link and 6-digit PIN.
- They see quarter totals for Form 941, W-2 and 1099-NEC worksheets, every pay stub and your tax deadline record, with spreadsheet downloads.
- They can't change anything, and they never see Social Security numbers, bank numbers or pay-app handles.
- Five wrong PINs lock the link for 15 minutes. You can see when it was last opened, make a new PIN or turn it off.
- **Year-end package** downloads five files for any year: every pay stub, quarter totals, W-2 worksheet, 1099-NEC worksheet and deadline record. These are worksheets, not filed forms.

13 Termination and offboarding

- A guided workflow in four phases: decision and approval, prepare, separation meeting, and after separation.
- It opens only after you read the **Termination Procedures** article and confirm the reason isn't illegal or retaliatory.
- Each step links to the matching document pre-filled for that person, such as the termination notice, final pay worksheet, property return form, COBRA checklist and exit interview.
- Enter the last day and how employment is ending, and JuntosHR shows when the final paycheck is due under your state's law and adds it to Tax deadlines.
- Loaned equipment is listed so you can check items back in.

14 Learning and help

- **Manager's Guide:** short chapters from before your first hire through letting someone go and keeping records, each linked to the tool that does it.
- **Knowledge Articles:** plain-language reads on interviewing, hiring, payroll and HR systems, each under 5 minutes.
- **How-To:** a getting-started checklist and answers to common questions.
- **Get help:** send a question, problem, billing issue or idea with how urgent it is. Replies show in My Business Hub and by email.
- **My Business Hub:** see all your Across the Table apps, billing and help requests in one place.
- Contact Across the Table: info@acrossthetable.biz · 480-582-4716 · acrossthetable.biz

15 Privacy, security and your data

- **Each account sees only its own data.** Your workspace is saved to your account, and every account is walled off from every other one.
- **Employees see only their own things.** The team app shows one person their own published schedule, their own time, their own paid pay stubs and their own documents. Nothing else.
- **Your accountant sees pay records only,** view-only, without Social Security numbers, bank numbers or pay-app handles.
- **Private links plus PINs.** Team app and accountant links need a 6-digit PIN that's shown to you once. Five wrong PINs lock the link for 15 minutes, and you can change or turn off access any time.
- **Two-step sign-in.** Turn on an authenticator-app code in Security Center. Once it's on, your data isn't released until the code is entered.
- **Auto-lock.** JuntosHR locks after a period of no activity that you choose.
- **Signature records** keep the signer's name, date, time, internet address, device and a document fingerprint.
- **Records of your choices.** Your Terms agreement, your pay and tax tool agreement, and every deadline confirmation are kept with the date.
- **Keep sensitive numbers out.** JuntosHR never asks for full Social Security numbers, full bank or card numbers, bank logins or medical records. Please don't type them into notes or fill-in fields.
- **My Business Hub** receives your email, plan, purchases, help requests and a few named moments (like approving payroll). Your people, payroll and documents stay in JuntosHR.
- **Your data & privacy** lists what's kept and the trusted services that help run the app. **Download my data** saves a copy of everything in your account.

- **Delete my account & data** permanently erases your account and every business, person, document, schedule and payroll record in it. Backup copies expire within 30 days. If you have a paid membership, cancel it on Stan too.
- As the employer, you're responsible for your workers' information. JuntosHR helps you organize HR and payroll records. It is not a payroll company, accountant, tax advisor or attorney.

16 Coming soon

- **Connect your own AI account.** The Account screen shows a "Your AI account" card, but no AI features use it yet.
- **Send for signature through DocuSign.** The option appears when collecting a signature, but it doesn't send through DocuSign yet. Use **Send to sign on their phone** or **Sign on this tablet** instead.
- **Team member logins with roles.** Security Center shows roles like Account Admin and Payroll Admin, but inviting other people to sign in to your owner account isn't available yet.
- **The owner side in Spanish.** Today only the team app is in English and Spanish.
- **Google Play app.** JuntosHR is coming to Google Play. Until then, use it in your browser or install it on your phone like an app.

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