



Onboarding (Hires Tasks)

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New Hires & New Hire Tasks

1. When the **Offer card** is created, the individuals listed as the **Reports to manager** and **Onboarding delegate**, will notice a hire listed in the **Offers** tile as **New hires** and **New hire tasks**.

Reports to manager:*

No user selected.

Onboarding delegate:

No user selected.

Offers

0 Offers awaiting your approval

1 New hires

11 New hire tasks

Note: If the hire is not appearing in your list, please contact your Talent Acquisition Strategic Partner or review the Offer Card and see if your name is listed in the appropriate field.

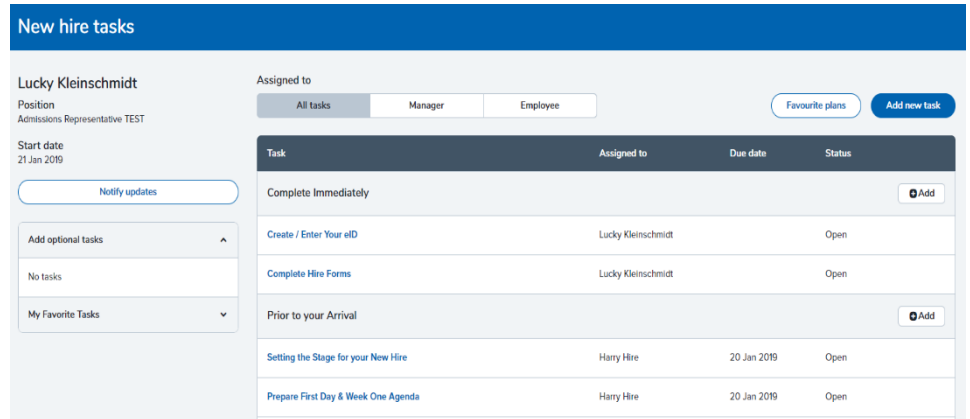
2. You may also access the **New hires** and **New hire tasks** in the drop down menu.
3. Click on **New Hires** in the Offer tile. A listing of the hires will be displayed by **Applicant Name**, **Requisition Number**, **Position Title**, **Application Status**, **View Offer Details** and **View All Tasks** (this is **NOT** be visible if the application status is **Online offer made**)
4. If you want to see the approved Offer Card, click on **View offer details**.

Applicant name	Requisition Number	Job title	Application status
Yvonne Wikander	492459	Intern	Offer accepted, form complete
Yantao Zhang	493053	Research Assistant Professor	Offer accepted
Tucker Aurs	492756	Medical Resident Year 1	Offer accepted
Thomas Wright	492940	Intern	Online offer made



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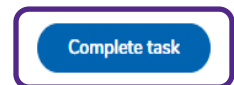
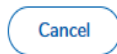
- 5. Click on **View all tasks**. The **New hire tasks** are tasks which have been assigned to the **Employee** and the **Manager** (which is designated by the **Reports to Manager & Onboarding Delegate** in the offer card).



Tasks are listed in groups (**Complete Immediately, Prior to your Arrival (or Prior to your First Day with Your New Position), First Day, First Week, First 30 Days, 31 – 90 Days, and 91 Days & Counting**). Depending on the type of hire and the workflow chosen for the hire will determine what groups you will see. Therefore, you may have all groups or variations of the groups.

Individuals listed on the offer card as **Reports to Manager** and **Onboarding Delegate** will have the **same tasks**. Therefore, it needs to be decided who will be responsible for which of those assigned tasks. There is no way to separate out these tasks between the **Reports to Manager** and **Onboarding Delegate** in the system.

- 6. To complete a task, click on **Complete task** at the bottom of the task.

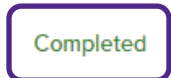


- 7. Once a task is **completed**, the status will change to **Completed**.

Complete Hire Packet with Hire

Harry Hire

22 Dec 2018

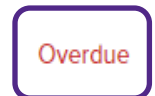


- 8. If a task is **Overdue**, the status will be designated with the red word of **“Overdue”**.

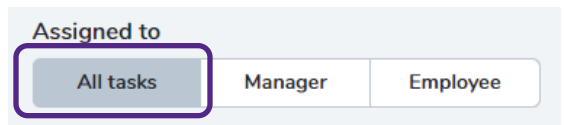
Start your position off right

Lucky Kleinschmidt

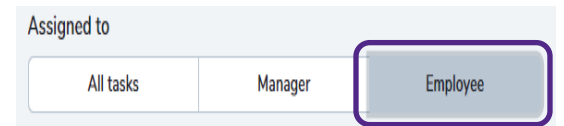
22 Dec 2018



- 9. By default, the task list will be displayed as **All tasks**



- 10. To view tasks assigned to the Employee, click on **Employee**





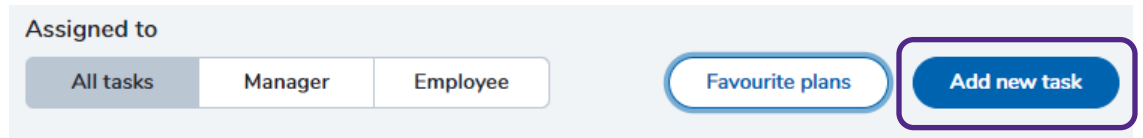
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11. To view tasks assigned to the Manager (Reports to Manager and Onboarding Delegate), click on **Manager**

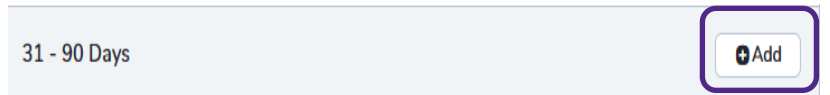


12. Tasks that are specific to your department, college/unit or to the particular position can be added to the task list. This can be for the Employee, Manager, or both. There are two ways in which this can be accomplished.

a. At the top of the screen, click on **Add new task**

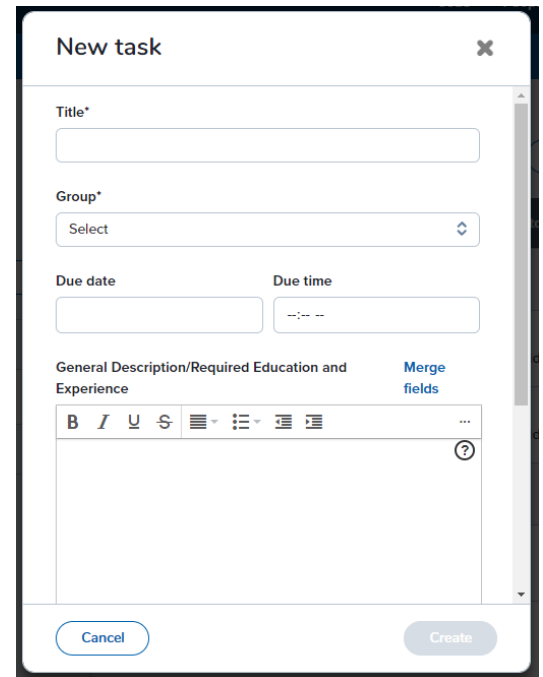
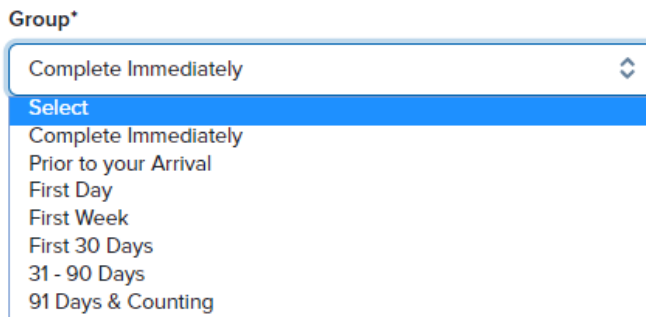


b. Go to the Group, click on **Add**



13. The **New Task** template will appear. Determine the **Title** for the task.

14. The listings for the **Group** will be dependent on the workflow selected for the hire. Select the appropriate **Group** for the task.



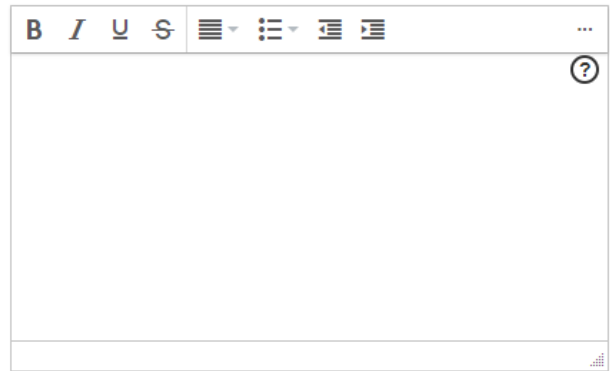
15. Determine the **Due Date** when the task needs to be completed.





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16. Determine the **Content** for the task.



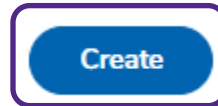
17. Determine who the **task will be allocated to**:

Task allocated to*
 Both Manager Employee

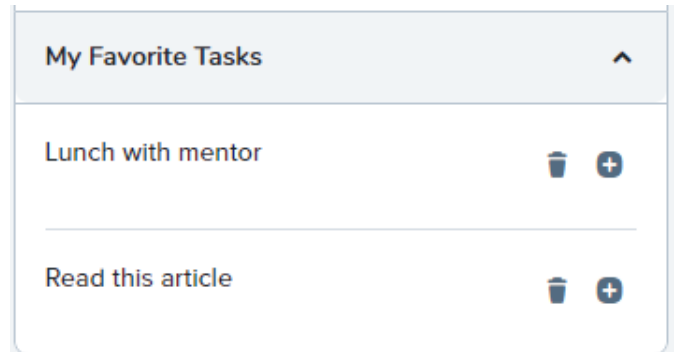
18. To have the task available for future hires, click **Add to favorites**



19. Once all is complete, click on **Create**

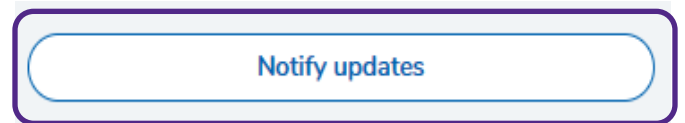


20. My Favorite Tasks appear on the left hand side of the screen. You can add to the list for future employees. If the task is no longer relevant, you do have the option to delete the task.



21. Click on **Notify updates** to notify the employee to log into their employee portal to complete onboarding tasks or to inform of any updates to the onboarding tasks.

22. An email will be sent to the email address which the employee had used when they applied for the position. Click **Send** to send the email.





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Completing New Hire Tasks in Bulk



Offers

0 Offers awaiting your approval

43 New hires

65 New hire tasks

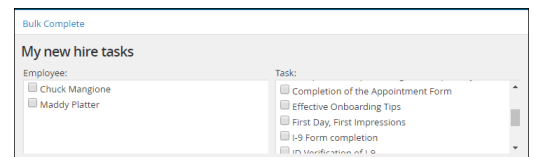
- To complete the same task for multiple hires at the same time, click on **New hire tasks** on your dashboard or **My new hire tasks** in the drop down menu.

- A list of all the hires and tasks will be shown.

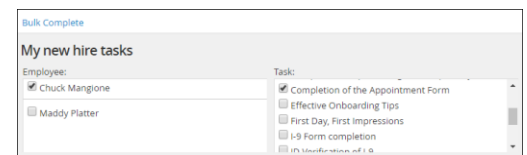
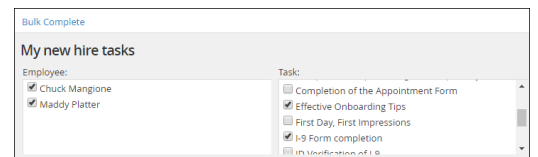
Select	Title	Employee	Windows user	Step due	Start date	
<input type="checkbox"/>	Circle Back first 6 months to One Year	Chuck Mangione		24 Jul 2017	15 Jan 2017	View all tasks
<input type="checkbox"/>	Circle Back first 6 months to One Year	Maddy Platter		26 Jun 2017	18 Dec 2016	View all tasks
<input type="checkbox"/>	Circle Back 90 Day Review	Chuck Mangione		15 Apr 2017	15 Jan 2017	View all tasks
<input type="checkbox"/>	Circle Back 90 Day Review	Maddy Platter		18 Mar 2017	18 Dec 2016	View all tasks
<input type="checkbox"/>	Circle Back 60 Day Review	Chuck Mangione		16 Mar 2017	15 Jan 2017	View all tasks
<input type="checkbox"/>	Circle Back 60 Day Review	Maddy Platter		16 Feb 2017	18 Dec 2016	View all tasks
<input type="checkbox"/>	Circle Back 30 Day Review	Chuck Mangione		14 Feb 2017	15 Jan 2017	View all tasks
<input type="checkbox"/>	Circle Back 30 Day Review	Maddy Platter		17 Jan 2017	18 Dec 2016	View all tasks
<input type="checkbox"/>	Completion of the Appointment Form	Chuck Mangione		15 Jan 2017	15 Jan 2017	View all tasks
<input type="checkbox"/>	State of Kansas Employee Oath	Chuck Mangione		15 Jan 2017	15 Jan 2017	View all tasks
<input type="checkbox"/>	First Day, First Impressions	Chuck Mangione		15 Jan 2017	15 Jan 2017	View all tasks
<input type="checkbox"/>	ID Verification of I-9	Chuck Mangione		15 Jan 2017	15 Jan 2017	View all tasks
<input type="checkbox"/>	I-9 Form completion	Chuck Mangione		14 Jan 2017	15 Jan 2017	View all tasks
<input type="checkbox"/>	Order 30 Day Parking Permit	Chuck Mangione		8 Jan 2017	15 Jan 2017	View all tasks
<input type="checkbox"/>	Prepare First Day & Week One Agenda	Chuck Mangione		8 Jan 2017	15 Jan 2017	View all tasks
<input type="checkbox"/>	Effective Onboarding Tips	Chuck Mangione		1 Jan 2017	15 Jan 2017	View all tasks

- In the upper left hand side of the screen, you will see the Employee's name and the Task. Select the appropriate employees and the task or multiple tasks which you want to **Bulk Complete**. There are two ways to handle.

- You may do **multiple employees** and **multiple tasks**.

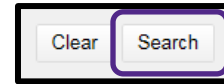


- Or, you may do only **one employee** and **one task**.

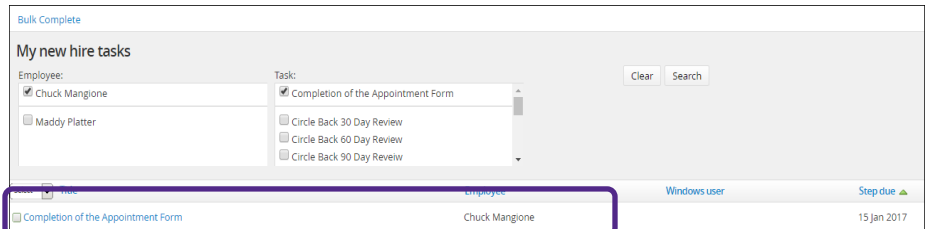


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4. Once you click the **Employee(s)** and the **Task(s)**, click **Search**.

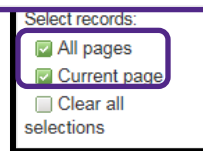
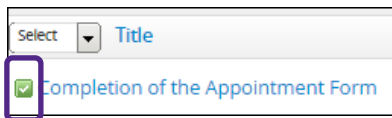


5. The selected individuals and tasks will appear.

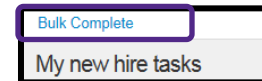


6. Click on **Select** for all pages or Current page.

You may also click on the **box** in front of the task(s).



7. Click on **Bulk Complete** at the top left hand corner of the screen.



8. After clicking **Bulk Complete**, you will receive a yellow box with confirmation of completed task(s).

