Onboarding
Access to onboarding is entered when creating the hire request (Steps 12 & 13). Names entered into the following fields on the hire request are granted access to onboarding: Immediate Supervisor, Search Initiator/Onboarding Access, Onboarding Coordinator, and Onboarding Delegate.

Additional access to undo completed tasks is granted to the Onboarding Coordinator and Onboarding Delegate.

View/Update Tasks for New Hires
Step 1: Select New Hires (Approve Offers and Manage Onboarding dashboard tile)
Step 2: Click View All Tasks to the right of new hire row
Step 3: View tasks and whom they are assigned to, due date, and completion status
Step 4: Click the task name to view details and/or update status to completed
Step 5: Click the trash can icon as needed, to eliminate tasks as needed (mandatory tasks cannot be removed and the icon does not display)

Add New Task to Onboarding Task List
Step 1: Select New Hires (Approve Offers and Manage Onboarding dashboard tile)
Step 2: Click View All Tasks to the right of new hire row
Step 3: Click Add new task button located above top right of task list or click + Add at each group/timeline section
Step 4: Add new task details including Title, Group (timeline section e.g. Prior to first day, first week, etc.), Due date, Due time, Description, Activity Type, Task Allocated to, and Add to Favorites
  Note: Add to Favorites checkbox saves the task details to be reused and added to future new hires
Step 5: Click Create button
Step 6: View new task on the task list and on left under My Favorite Tasks
Step 7: Click Notify updates to create an update notification to advise new employee of new tasks to complete, and click Send

Add Optional Tasks or My Favorite Tasks to Task List
Step 1: Select New Hires (Approve Offers and Manage Onboarding dashboard tile)
Step 2: Click View All Tasks to the right of new hire row
Step 3: Click the plus sign (+) for the applicable task
Step 4: Update Tasks details as needed
Step 5: Click Create button
Step 6: View new tasks on the task list
  Note: To update the location on timeline (e.g. First Day, Following Orientation, etc.), edit task and update the Group* field.

Filter Open Tasks by Employee/Task
Step 1: Select Current Onboarding Tasks (Approve Offers and Manage Onboarding dashboard tile)
Step 2: Select Employee name(s) or Task(s)
Step 3: Click Search
Step 4: Click Clear to remove current filter and view all open tasks for all employees
Step 5: Bulk Complete open tasks by checking the Title check box (on left) for applicable tasks/employees and click Bulk Complete (top of page)
  Note: Tasks remove from My Onboarding Tasks list when completed and remain on New Hires onboarding task list
Step 6: Click View all tasks to view all tasks for the specific employee (return to New Hires task list)