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:* *(Optional)* 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)