Onboarding (Hires Tasks)

Table of Contents

New Hires & New Hire Tasks ............................................................................................................................................. 2

Completing New Hire Tasks in Bulk ................................................................................................................................ 6
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*
   Onboarding delegate:
```

```
Offers
0 Offers awaiting your approval
   1 New hires
   1 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.
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.

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

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

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


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

17. Determine who the **task will be 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.
Completing New Hire Tasks in Bulk

1. 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.

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

3. 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.

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

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