

# Onboarding

## Revision history

Last modified on	Author	Reason
3/19/2019	CHRS Recruiting Training Team	Initial publication

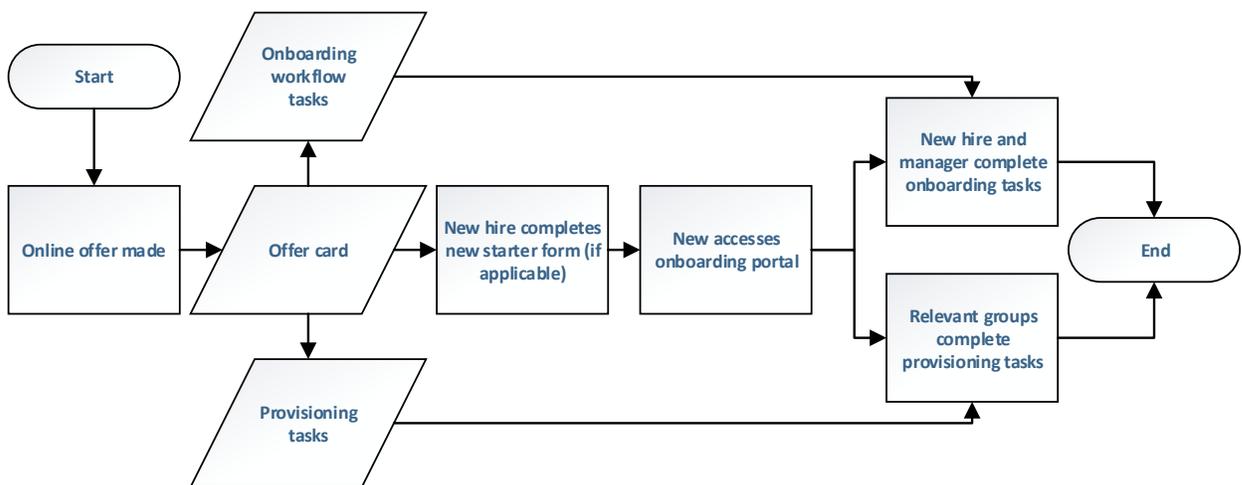
## Introduction

This guide shows you how to work through new employee onboarding processes.

Each campus has its own onboarding processes that include specific tasks and workflows that determine the task order and timing. New hires are expected to complete learning and other tasks as they begin their new jobs.

As a hiring administrator, you need to manage your new hire’s onboarding task progress and provisioning. You will also complete onboarding tasks yourself.

## Process diagram



- The online offer is made and accepted by the applicant.
- Onboarding workflow and provisioning tasks are associated through the offer card.
- The new hire completes an onboarding form.
- The new hire gains access to the onboarding portal, which welcomes the new employee and a provides a list of tasks that the applicant should complete.
- The hiring manager also receives a list of tasks that must be completed.
- Onboarding process ends when all tasks are complete.

## What you will do

- View new hires
- View new hire tasks
- Manage new hire tasks

- Complete new hire tasks
- Add a task

## Definitions

<b>Term</b>	<b>Definition</b>
<b>Onboarding portal</b>	A website where a newly hired employee receives orientation materials, forms to complete, and tasks. New hires log into their applicant portal to access the onboarding portal.
<b>Onboarding workflow</b>	A list of onboarding tasks that must be completed by the new hire and sometimes also the hiring manager. Tasks are grouped into times when the tasks must be completed. For example, on the first day, a new hire must complete several new hire forms, while another set of tasks must be completed within the first 10 days.
<b>Provisioning</b>	A CHRS Recruiting feature that you use to order equipment, access, hardware, and software needed for a new hire. For physical items, you provide an address for where the items are to be delivered.

## View new hires

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Your new hires are shown directly on your dashboard. You can find them and their tasks from the Offers widget.

### When to view new hires

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You can view new hires whenever you have new employees who need to complete onboarding tasks.

### Prerequisites and assumptions

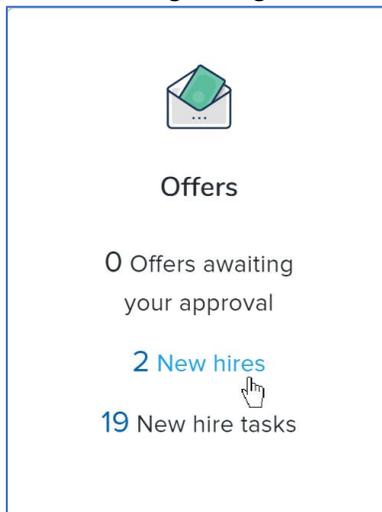
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- You can access the Hiring Manager Dashboard.
- You have been designated as the person the new hire reports to on the offer card.

### How to view new hires

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From the Hiring Manager Dashboard, click **New Hires** on the Offers widget.



The **My New Hires** page opens, showing the following information:

- Applicant name
- Requisition number
- Job title
- Application status
- View offer link
- View tasks link

### What happens next

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- You can view each applicant's offer details.
- You can view each applicant's onboarding tasks.

### Related documents

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REC\_RG\_13\_HM Dashboard.docx

## View my new hire tasks

To work with new hire tasks, you work in two pages with slightly different functionality:

- **My new hire tasks** lists all tasks for all of your employees.
- **New hire tasks** shows tasks, due dates, and statuses for a particular employee onboarding workflow.

### When to view new hire tasks

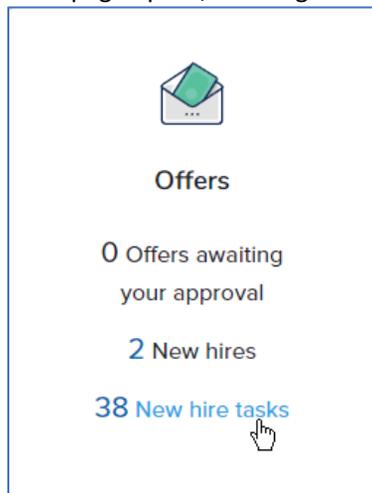
- You want to find tasks by task name or by employee.
- You want to complete tasks in bulk.

### Prerequisites and assumptions

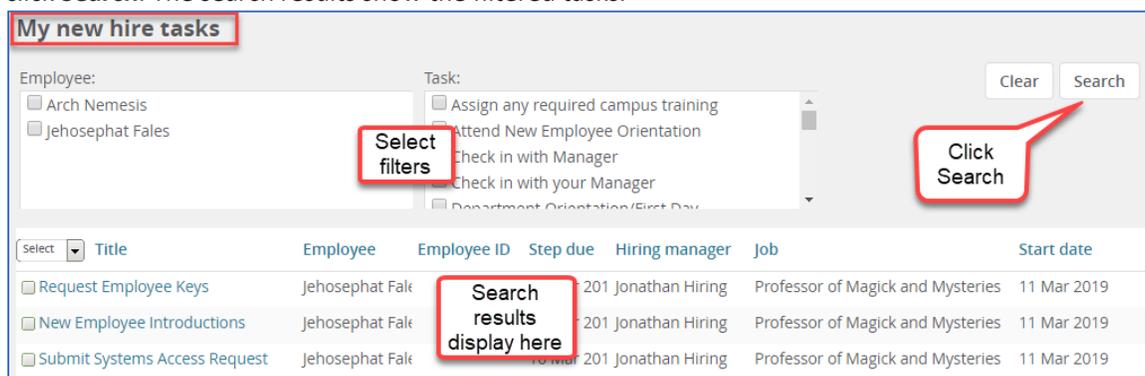
- You can access the Hiring Manager Dashboard.
- You have been designated as the person the new hire reports to on the offer card.

### How to view new hire tasks

1. From the hiring manager dashboard, click **New hire tasks** on the Offers widget. **My new hires tasks** page opens, showing tasks for your new hires.



2. To find specific tasks, select the employee, task, or both in the **Employee** and **Task** boxes, then click **Search**. The search results show the filtered tasks.



### What happens next

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- You can select onboarding tasks to complete in bulk.
- You can **View all tasks** to manage an employee's onboarding workflow.

### Related documents

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[Onboarding – Onboarding workflows](#)

## Manage new hire tasks

Use the **New hire tasks** page to do the following activities:

- View all of the tasks for the employee onboarding workflow, including their
  - Statuses
  - Due dates
  - Assignments
- Add and assign new tasks.
- Send update notifications.

### When to manage new hire tasks

- You want to track a specific employee's progress through the onboarding workflow.
- You need to assign a new onboarding task.

### Prerequisites and assumptions

- You can access the **My new hire tasks** page.
- You have been designated as the person the new hire reports to on the offer card.

### How to manage new hire tasks

Use the following procedure to manage tasks for a particular employee.

The screenshot shows the 'My new hire tasks' interface. At the top left, there is a 'Bulk Complete' button. Below it, the 'My new hire tasks' header is highlighted with a red box and a red circle labeled '1'. An arrow points from this header to the 'Employee:' dropdown menu, which is also highlighted with a red box and a red circle labeled '2'. The dropdown menu shows 'Arch Nemesis' selected. To the right of the dropdown is a 'Search' button. An arrow points from the 'Search' button to the search results table. In the table, the 'View all tasks' link for the first row is highlighted with a red box and a red circle labeled '3'.

Select	Title	Employee	Employee ID	Step due	Hiring manager	Job	Start date	
<input type="checkbox"/>	Attend New Employee Orientation	Arch Nemesis		2 Feb 2019	Jonathan Hiring	Admin Analyst/Spclst 12 Mo	2 Jan 2019	<a href="#">View all tasks</a>
<input type="checkbox"/>	Request Employee Keys	Arch Nemesis		7 Jan 2019	Jonathan Hiring	Admin Analyst/Spclst 12 Mo	2 Jan 2019	<a href="#">View all tasks</a>
<input type="checkbox"/>	New Employee Introductions	Arch Nemesis		7 Jan 2019	Jonathan Hiring	Admin Analyst/Spclst 12 Mo	2 Jan 2019	<a href="#">View all tasks</a>

1. Open the **My new hire tasks** page.
2. Select the employee and then click **Search**.
3. Click **View all tasks** in the search returns area.

The **New hire tasks** page opens. From here you can review the task list, including status and due date information.

**New hire tasks**

Arch Nemesis  
Position\*  
Admin Analyst/Spclst 12 Mo

Start date  
2 Jan 2019

Notify updates

Add optional tasks ^

- Employee Performance review +
- Performance review +
- Direct Deposit Enrollment Authorization +
- My Favorite Tasks v

Task	Assigned to	Due date	Status
Before your first day <span>+ Add</span>			
Order Phone	Jonathan Hiring	30 Dec 2018	Completed
Plan the first day	Jonathan Hiring	30 Dec 2018	Overdue
New Hire Starter Form	Arch Nemesis	31 Dec 2018	Overdue
Identify work space	Jonathan Hiring	01 Jan 2019	Overdue
Order Technology	Jonathan Hiring	01 Jan 2019	Overdue

## What happens next

On the **New hire tasks** page, you can do the following activities:

- Complete tasks.
- Edit tasks.
- Add new tasks.
- Notify the employee about updates to the task list.

## Related documents

[Onboarding – Onboarding workflows](#)

## Complete new hire tasks

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You can complete your own tasks or complete tasks on behalf of your employee. Tasks are often done outside the system, but you mark them as completed within CHRS Recruiting.

Tasks often include links, phone numbers, or other information that you use for completing the task.

### When to complete new hire tasks

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Mark tasks as completed after the actual task is finished.

### Prerequisites and assumptions

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- The task has been done.
- You can access **New hire tasks**.
- You can access **My new hire tasks**.
- You have been designated as the person the new hire reports to on the offer card.

### How to complete new hire tasks

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1. Open **My new hire tasks**.
2. Click the task that you need to complete to open the task.

Task	Assigned to	Due date	Status
Before your first day			<a href="#">Add</a>
<a href="#">Order Phone</a>	Jonathan Hiring	30 Dec 2018	Overdue <a href="#">Edit</a>

3. Do the task, using any information provided. In this example: ordering a phone.
4. Click **Complete task**.

Order Phone
✕

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**Step due:** 31 Dec 2018

Order a phone for your new employee and arrange for installation.

[Telephone Services](#)

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Cancel
Complete task

## How to complete new hire tasks in bulk

If you do several new hire tasks at once, you can complete them in bulk instead of opening each task individually.

The screenshot shows the 'My new hire tasks' interface. At the top left is a 'Bulk Complete' button. Below it is a header 'My new hire tasks'. Under the header, there are two dropdown menus: 'Employee' (with 'Jehosephat Fales' selected) and 'Task' (with several options like 'Assign any required campus training', 'Check in with Manager', etc.). Below these are several tasks with checkboxes: 'Review Position Description', 'Request P-Card', 'Order Business Cards', and 'Order Name Plate'. A table below the tasks shows columns for 'Title', 'Employee', and 'Employee ID'. Red callouts 1, 2, and 3 point to the 'My new hire tasks' header, the 'Request P-Card' checkbox, and the 'Bulk Complete' button respectively.

Select	Title	Employee	Employee ID
<input checked="" type="checkbox"/>	Review Position Description	Jehosephat Fales	
<input checked="" type="checkbox"/>	Request P-Card	Jehosephat Fales	
<input checked="" type="checkbox"/>	Order Business Cards	Jehosephat Fales	
<input type="checkbox"/>	Order Name Plate	Jehosephat Fales	

1. Open **My new hire tasks**.
2. Select the tasks that you completed.
3. Click **Bulk Complete**.

### What happens next

- The task displays Completed in its status column.
- The task is removed from **My new hire tasks**.

### Related documents

[Onboarding](#)

## Add a task

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You can create a task if that task is not included in the onboarding workflow.

### When to add a task

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- The applicant has special needs or requirements.
- You need to assign a task to yourself or another user.

### Prerequisites and assumptions

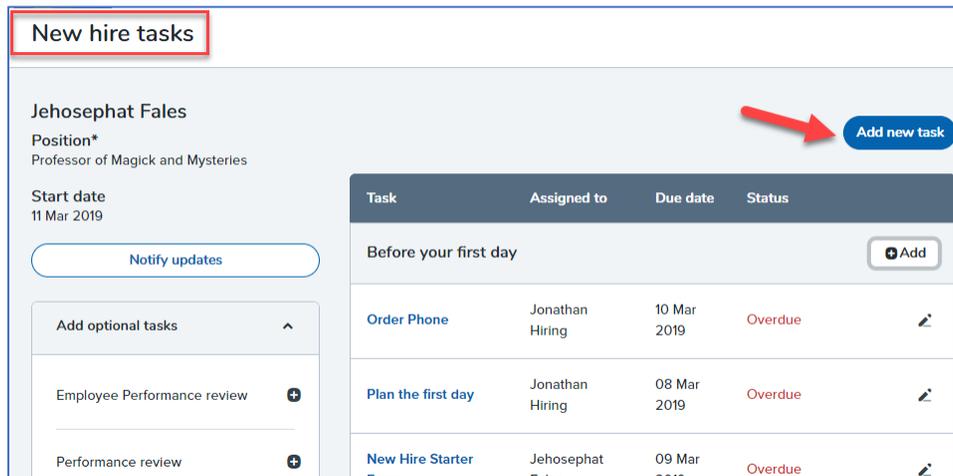
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- You can access **New hire tasks**.
- You have been designated as the person the new hire reports to on the offer card.
- You have permission to add tasks.

### How to add a task

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1. Open **New hire tasks**.
2. Click **Add new task**.



The screenshot displays the 'New hire tasks' interface for Jehosephat Fales. The interface includes a header with the name and position, a start date, and a 'Notify updates' button. Below this is a section for 'Add optional tasks' with a dropdown menu. The main part of the interface is a table of tasks with columns for Task, Assigned to, Due date, and Status. A red arrow points to the 'Add new task' button in the top right corner.

Task	Assigned to	Due date	Status
Before your first day			
Order Phone	Jonathan Hiring	10 Mar 2019	Overdue
Plan the first day	Jonathan Hiring	08 Mar 2019	Overdue
New Hire Starter Form	Jehosephat Fales	09 Mar 2019	Overdue

3. Complete the **New task** form using the following screen captures and data.

The screenshot shows a 'New task' form with the following elements:

- 1**: A text input field for the **Title\***.
- 2**: A dropdown menu for the **Group\*** with 'Select' as the current value.
- 3**: Two input fields for **Due date** and **Due time**.
- 4**: A rich text editor for the **Description** with a toolbar containing icons for bold, italic, underline, strikethrough, bulleted list, numbered list, link, and unlink. A red arrow points to a **Merge fields** link next to the toolbar.

At the bottom of the form are **Cancel** and **Create** buttons.

#	Field	Information
1	<b>Title*</b>	Enter the title of the task. This is a mandatory field.
2	<b>Group*</b>	Which group does the task belong to? Examples: First day, first week. This is a mandatory field.
3	<b>Due date and Due time</b>	Enter the due date and time for task completion.
4	<b>Description</b>	Use the rich text editor to specify what the user needs to do to complete the task. <ul style="list-style-type: none"> <li>• Click the ellipses icon [...] in the toolbar to see more text editing options.</li> <li>• You can include hyperlinks to forms or other resources that the user needs to complete the task.</li> <li>• You can use the <b>Merge fields</b> link to see a list of merge field that you can use for writing the task description.</li> </ul>

4. Scroll down to see the rest of the **New task** window.

The screenshot shows a form with the following elements:

- Activity type:** A dropdown menu with the text "Select" and a red number "1" next to it.
- Task allocated to\*:** Three radio button options: "Both", "Manager/Supervisor", and "Employee". A red number "2" is placed to the right of these options.
- Add to favorites:** A checkbox with the text "Add to favorites" and a red number "3" next to it.
- Buttons:** A "Cancel" button on the bottom left and a "Create" button on the bottom right.

#	Selection	Information
1	<b>Activity type</b>	This functionality is not used by CSU. Leave this field blank.
2	<b>Task allocated to*</b>	Select the person who does the task. This selection is mandatory.
3	<b>Add to favorites</b>	Favorites are added to <b>My Favorite Tasks</b> on the <b>New hire tasks</b> page.

5. Click **Create**.

**What happens next**

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The task is assigned to the user and is displayed in the tasks list.

**Related documents**

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[Offers – Merge fields](#)

[Rich text editor](#)

REC\_RG\_21\_Offers.docx