Onboarding Training Resource Guide

Onboarding is initiated through the Offer Card process. For more information, refer to the <u>Offer Process</u> <u>Guide</u> on the DHRM website. **New Hires must accept the offer through PageUp to gain access to the Onboarding portal.**

At the "Onboarding Details" section on the offer card, complete the following fields to activate onboarding:

- A. Onboarding Form: New hire form
- B. Onboarding Workflow: Onboarding
- C. *Reports to Manager*: Manager who will be responsible for overseeing the onboarding process.
- D. *HR Rep/Onboarding Delegate*: Agency HR Rep who will be responsible for overseeing the onboarding process (if applicable).
- E. *HR Rep/Onboarding Delegate 2*: Secondary agency HR Rep who will be responsible for overseeing onboarding process (if applicable).

		ONBOARDING DET
Position title:	Senior Test Developer	
Onboarding Form:*	New hire form	
Onboarding Workflow:*	Onboarding	
Reports to manager:*	Melissa McRecruiter	Q B
	ponnette.smith+recruiter@c	Ihrm.virginia.gov 🗡
HR Rep / Onboarding		QB
Delegate:	No user selected.	
HR Rep / Onboarding		Q d
Delegate 2:	No user selected.	

Complete the remaining steps of the Offer Process Guide including the Approval Process.

Applicant / New Hire View

When the applicant receives the offer email from the PageUp system, they are prompted to login to their applicant portal to view the offer. Below is a screenshot of what the applicant will see.

ou have been made	e an employment offer for your Deputy Clerk - King William application.
ust so we can get to	o know you better, we'd like for you to tell us more about yourself.
so that we can unde	rstand where you'd really make a difference, every little bit of information you add counts! And of course - you can always provide us your resum

Once the offer is accepted, the applicant will gain access to the New Hire Form and the Onboarding portal.

∧ New hire form	Saved
Personal details	~
Congratulations on your new position with our organization, we wish to extend you a warm welcome.	
To assist with the onboarding process we require you to provide us with some important information as outlined within convenience.	n this form. Please complete all mandatory information at your earliest
First name (as on legal documents ie passport)	
2011	
Middle name (as on legal documents ie passport)	
(optional)	
Last name (as on legal documents is passport)	

Velcome Donna	+ Home	Update profile	Update resumé	Account

The new hire will see a list of tasks which are grouped by the time frame in which the tasks need to be completed. Once completed, the task will show as a completed task on the Onboarding Manager and Onboarding Delegate's new hire dashboard.

Review and Pending hiring Complete I-9 completion of task	Review and O Complete W 4 Tax Form	Reviewand ⊘ Gomplete VA_4 Tax Form	Review and O Sign Alcohol & Other Drugg Form
Review Use of Due: 19 Feb Electronics 2024 and Social Media form	Employee Due: 19 Feb Work Profile 2024 (EWP)	Standard Due: 19 Feb Telework 2024 Agreement	Hybrid Due: 19 Feb Retirement 2024 Plan Beneficiary

Recruiter / Hiring Manager View

New Hire Form

The completed new hire form is accessed through the applicant card in the history tab. Due to the sensitive information on the New Hire Form only those members in charge of onboarding will have complete access.

From the list of applicants select the applicant you wish to view to open the applicant card.

- 1. Select the "History" tab.
- 2. Select the job the applicant applied for from *Job* dropdown.
- 3. Under items, select "Forms".
- 4. Under "New hire form" select *View*.

Job < 2	1	tem	
All) (All 3	٥]
Yesterday, 9:28am	Note QA Test Analt System cha	All Activities Application submissions Assessments Assign applications Communication Documents	d by Ja
Yesterday, 9:28am PageUp Administrator	Commun QA Test Anah Email: Offer <noreply@d< td=""><td>Offers Rankings Tasks/reminders</td><td>RGINIA.</td></noreply@d<>	Offers Rankings Tasks/reminders	RGINIA.
	View		
Yesterday, 9:28am	QA Test Analy	st (5000891)	

New Hire Tasks

On the Recruiter Dashboard under Manager Activities, the "New hire tasks" item can be selected to view assigned or completed onboarding tasks that have been done by the new employee and/or manager.

l Current jobs			~	Ø Primary teams & users	~
	1 Total	0 Offer		Manager Activities Jobs requiring panel review	^
▲1	Senior Test Developer			55 New hire tasks	

In the "My new hire tasks" window you can:

1. Choose specific employee(s)

and/or

2. Select specific tasks.

My new hire tasks							
Employee: 1 Bobby Blair Jamie Norman	Task:			Clear	Search		
Select V Title	Employee	BadgeID	Step di	Hiring mana	Job	Start date	
HR - Complete New Hire Forms	Bobby Blair		Apr 18, 2(Jason Recruiter	Operations ma	Apr 25, 2024	View all tasks
HR - Request Employee Badge	Bobby Blair		Apr 18, 2(Jason Recruiter	Operations ma	Apr 25, 2024	View all tasks
HR - Request Employee Parking Pass	Bobby Blair		Apr 18, 2(Jason Recruiter	Operations ma	Apr 25, 2024	View all tasks

Filtering by task can be an easy way to review whether a task is complete.

Once your selections are complete, click *Search* to view the results.

Click *View all tasks* to see a complete listing of tasks per employee.

Manage task screen options

- 1. Review all tasks.
- 2. Add new task.
- 3. Notify employee of updates.
- 4. Edit a task.
- 5. Delete a task.
- 6. Add optional task.

w hire tasks						
bby Blair Ition abors manager	0					Add new tas
t date		Task	Assigned to	Due date	Scacus	
Notify updates	$ \rightarrow $	Before the first day:				+ Add
Add optional tasks	•	Review and Complete W-4 Tax Form	Bobby Blair	24 Apr 2024	Overdue	2 1
complete Probationary Review		Review and Complete VA-4 Tax Form	Hobby Hiair	24 Apr 2024	Overdue	21
lpload Document	•	Standard Telework Agreement	Bobby Blair	24 Apr 2024	Overque	1
IR - Follow Up with Supervisor	+	Review Employee Handbook	Hobby Hair	24 Apr 2024	Completes	1
ly Favorite Tasks	*	Equal Employment Opportunity Executive Order	Bobby Blair	24 Apr 2024	Completed	1
		Review Standards of Conduct	Dobby Olar	24 Apr 2024	Completed	1

Review Tasks

The task list begins with items in the *Before the first day* group and ends with the completion of the *First Year* group. In this task window you can see each task group, who it's assigned to, the due date (if applicable), and status. Scroll down or up to see all the tasks listed.

1	Task	Assigned to	Due date	Status	
$ \rightarrow $	Before the first day:				+ Add
*	Review and Complete W-4 Tax Form	Bobby Blair	24 Apr 2024	Overdue	2.8
+	Review and Complete VA-4 Tax Form	Bobby Blair	24 Apr 2024	Overdae	/ 8
+	Standard Telework Agreement	Bobby Blair	24 Apr 2024	Overdue	~
+	Review Employee Handbook	Bobby Blair	24 Apr 2024	Completed	2
~	Equal Employment Opportunity Executive Order	Bobby Blair	24 Apr 2024	Completed	1
	Review Standards of Conduct	Bobby Blair	24 Apr 2024	Completed	1

Add New Tasks

When the *Add new task* button or *Add* is selected, a "New task" pop-up window appears.

New hire tasks	
Bobby Blair Position Operations manager	Add new task
Start date Apr 25, 2024 Task Assigned to Due Start Notify updates Before the first day:	htus + Add New task
 In "New task" window: 1. Enter the "Title" of the task. 2. Select the "Group" to indicate when the task should be completed. 3. Set "Due date" and "Due time" as needed. 4. Add instructions in the "Description" box. 5. Assign task to Employee, Manager, or Both under "Task allocated to". 6. Select Create to save the task . 	Title* Schedule Lunch with Team Group* First Month Due date Due time Image: Schedule a time Image: Schedule a time for New Hire to meet with the Team for a lunchtime Meet n Greet. Find a time the works best for most of the team. Activity type Select Task allocated to* Both Image: Employee Additional task owner Search

Notify employee of updates

-

To inform new hire of added tasks or updates select *Notify updates*.

New hire tasks	
Bobby Blair Position Operations manager Start date	3 Task
Apr 25, 2024 Notify updates	Befo
Add optional tasks	^ Review
Complete Probationary Review	+ Review
Upload Document	+ Stand
HR - Follow Up with Supervisor	+ Review
My Favorite Tasks	~ Equal

Once selected the user will be prompted to send the below email. Update email as needed and send.

From*	
PONNETTE.SMITH@DHRM.VIRGINIA.GOV	
Subject*	
Onboarding task updated	
Message*	Merge field
B I ⊻ ᢒ ≣- ☷- 彊 ⊡	?
Dear JAMIE,	
This is a notification to advise that som have been made to your onboarding ta Please login <u>HERE</u> to review the update	ask list.
This is a notification to advise that som have been made to your onboarding ta	ask list.
This is a notification to advise that som have been made to your onboarding ta Please login <u>HERE</u> to review the update	ask list.

Edit Task

When the pencil icon on a task row is selected, an "Edit task" pop-up window appears.

Review and Complete VA-4 Tax Form	Bobby Blair	24 Apr 2024	Overdue	Edit
Standard Telework Agreement	Bobby Blair	24 Apr 2024	Overdue	
Review Employee Handbook	Bobby Blair	24 Apr 2024	Completed	Ż
Equal Employment Opportunity Executive Order	Bobby Blair	24 Apr 2024	Completed	Ľ
Review Standards of Conduct	Bobby Blair	24 Apr 2024	Completed	Ż

Edit task fields in the task editing window. Select *Update* once completed.

Edit task		×
Title*		*
Review and Complete W-4 Tax Fo	rm	
Group*		- 1
Before the first day:		٥
Due date	Due time	
Description	Merge fie	elds
B I ⊻ ᢒ ≣· ∷=· 3	∎ ⊒ … (?
Review and Complete <u>W-4 Ta</u> y	<u>< Form</u>	~
Cancel	Upo	late

Delete Task

Delete a task by selecting the trash can icon on the task item, if applicable.

If the trash can icon is not available, edit the task and move it to the "Not applicable" group. This will remove it from main task groups.

lew hire tasks						
AMIE NORMAN						
osition A Test Analyst						dd new task
tart date pr 15, 2024		Task	Assigned to	Due date	Status	
Notify updates		Before the first day:				+ Add
Add optional tasks	^	Review and Complete I-9	JAMIE NORMAN	14 Apr 2024	Overdue	20
Complete Probationary Review	+	Review and Complete W-4 Tax Form	JAMIE NORMAN	14 Apr 2024	Overdue	2 1
HR - Follow Up with Supervisor	+	Review and Complete VA-4 Tax Form	JAMIE NORMAN	14 Apr 2024	Overdue	2 8
My Favorite Tasks	*	Standard Telework Agreement	JAMIE NORMAN	14 Apr 2024	Overdue	2

Add Optional Task(s)

Optional tasks in the left task box can be added by selecting the plus (+) sign next to the appropriate task. Like the "Add new task" action, an editing pop-up window appears where the details of the task can be defined before saving to the task list.

Note: The "Upload Document" task can be used to create a task that will allow for the upload of a single document. This is utilized as an option which provides the ability to a upload document of choice.

New hire tasks		
Bobby Blair		
Position Operations manager		
Start date Apr 25, 2024		Task
Notify updates		Before the
Add optional tasks	~	Review and C
Complete Probationary Review	+	Review and C
Upload Document	+	Standard Tele
HR - Follow Up with Supervisor	+	Review Emplo
My Favorite Tasks	~	Equal Employ

Managing Tasks in New Hire Task View

As tasks are completed by the new employee and/or manager, the task list will reflect this in the *Status* column. "Completed" will show in green and "Overdue" tasks appears in red on the dashboard.

Note: Always verify the completion of all tasks for accuracy.

 New hire tasks

obby Blair						Add new tas
sition erations manager						Constants
art date r 25, 2024		Task	Assigned to	Due date	Status	
Notify updates		Before the first day:			_	+ Add
Add optional tasks	^	Review and Complete W-4 Tax Form	Bobby Blair	24 Apr 2024	Overdue	2 6
Complete Probationary Review	+	Review and Complete VA-4 Tax Form	Bobby Blair	24 Apr 2024	Overdue	1
Upload Document	+	Standard Telework Agreement	Bobby Blair	24 Apr 2024	Overdue	
HR - Follow Up with Supervisor	+	Review Employee Handbook	Bobby Blair	24 Apr 2024	Completed	2
My Favorite Tasks	v	Equal Employment Opportunity Executive Order	Bobby Blair	24 Apr 2024	Completed	1
		Review Standards of Conduct	Bobby Blair	24 Apr 2024	Completed	1