Onboarding Training Resource Guide

Onboarding is initiated through the Offer Card process. For more information, refer to the Offer Process Guide 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).


Complete the remaining steps of the Offer Process Guide including the Approval Process.
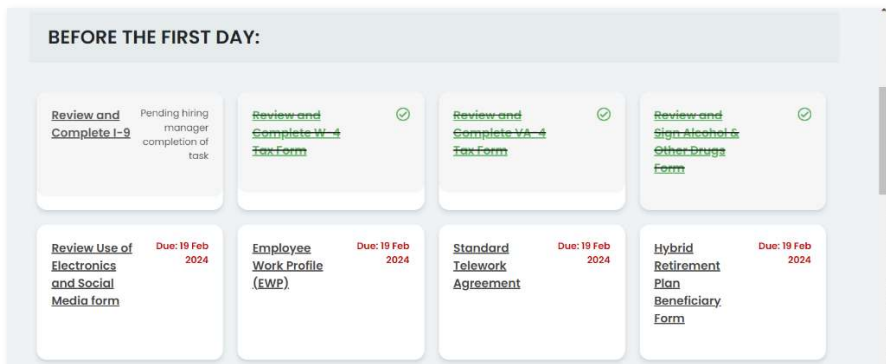
Applicant / New Hire View

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.

Once the offer is accepted, the applicant will gain access to the New Hire Form and the Onboarding portal.
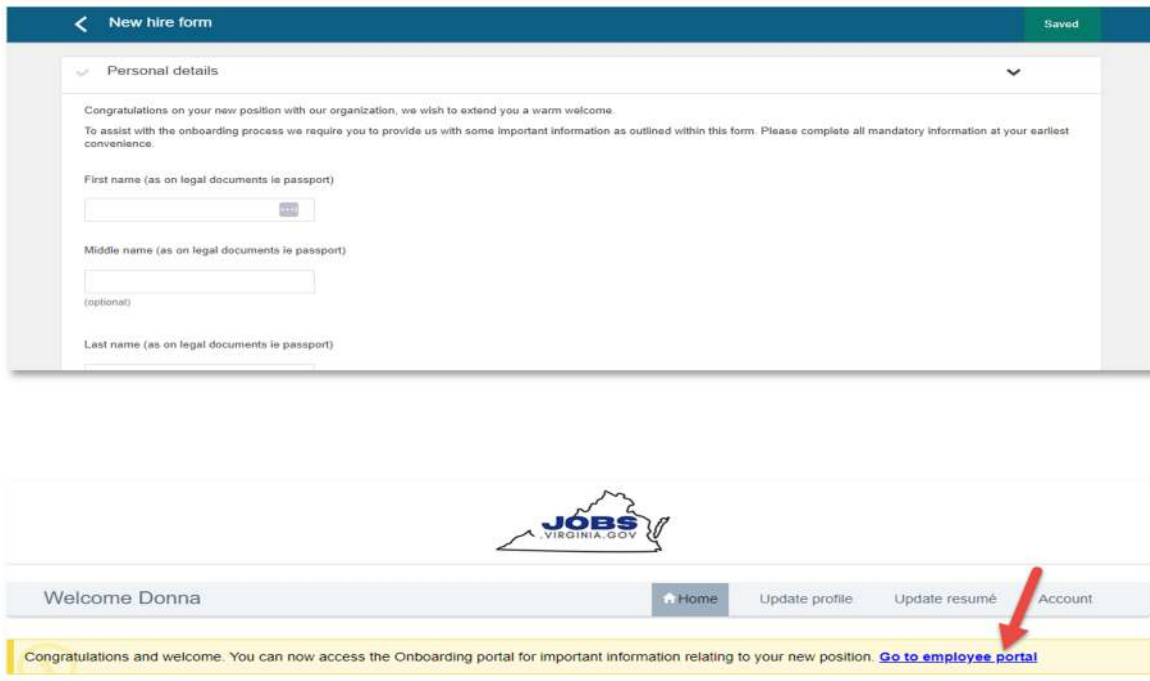
The new hire will see a list of tasks which are grouped by the time frame in which the tasks need to be completed. Once completed, the task will show as a completed task on the Onboarding Manager and Onboarding Delegate's new hire dashboard.

<u>Recruiter / Hiring Manager View</u>

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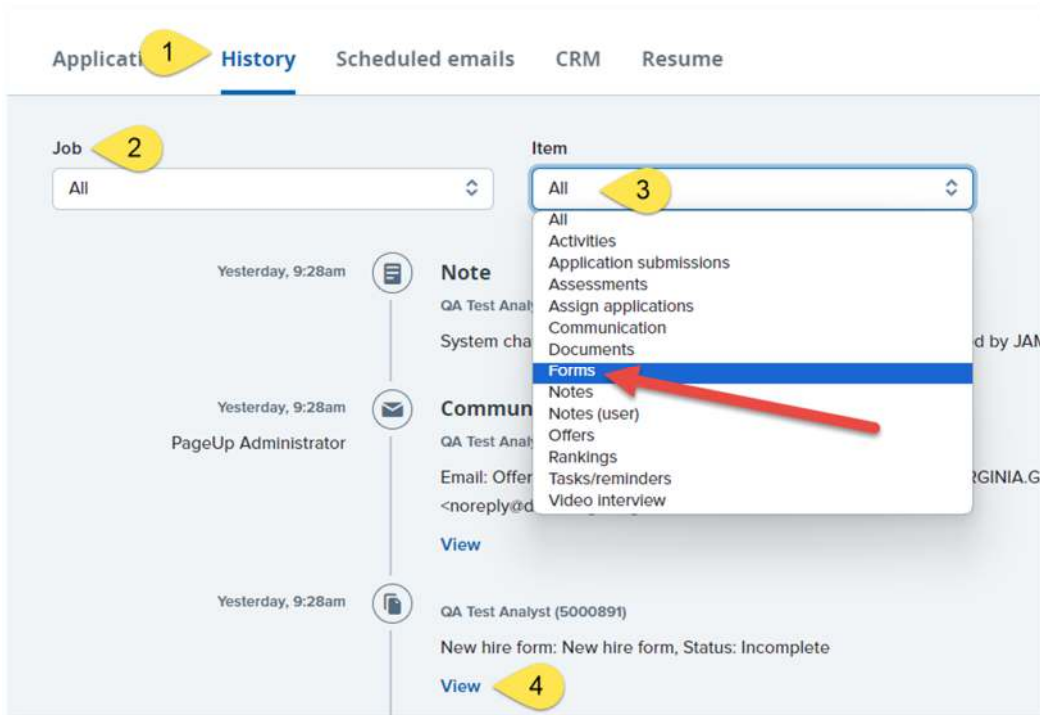
New Hire Tasks
On the Recruiter Dashboard under Manager Activities, the "New hire tasks" item can be selected to view assigned or completed onboarding tasks that have been done by the new employee and/or manager.
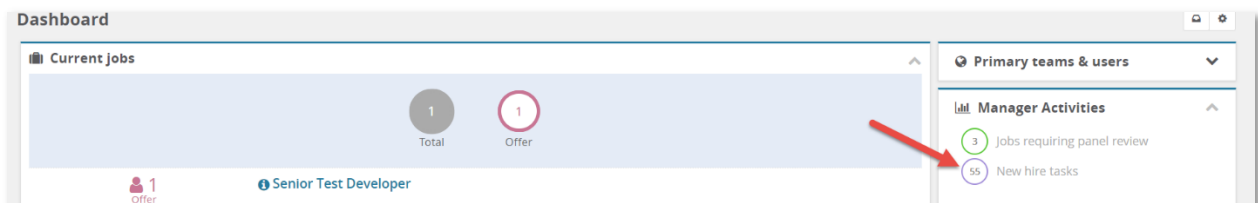
In the "My new hire tasks" window you can:

1. Choose specific employee(s)
   and/or
2. Select specific 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.
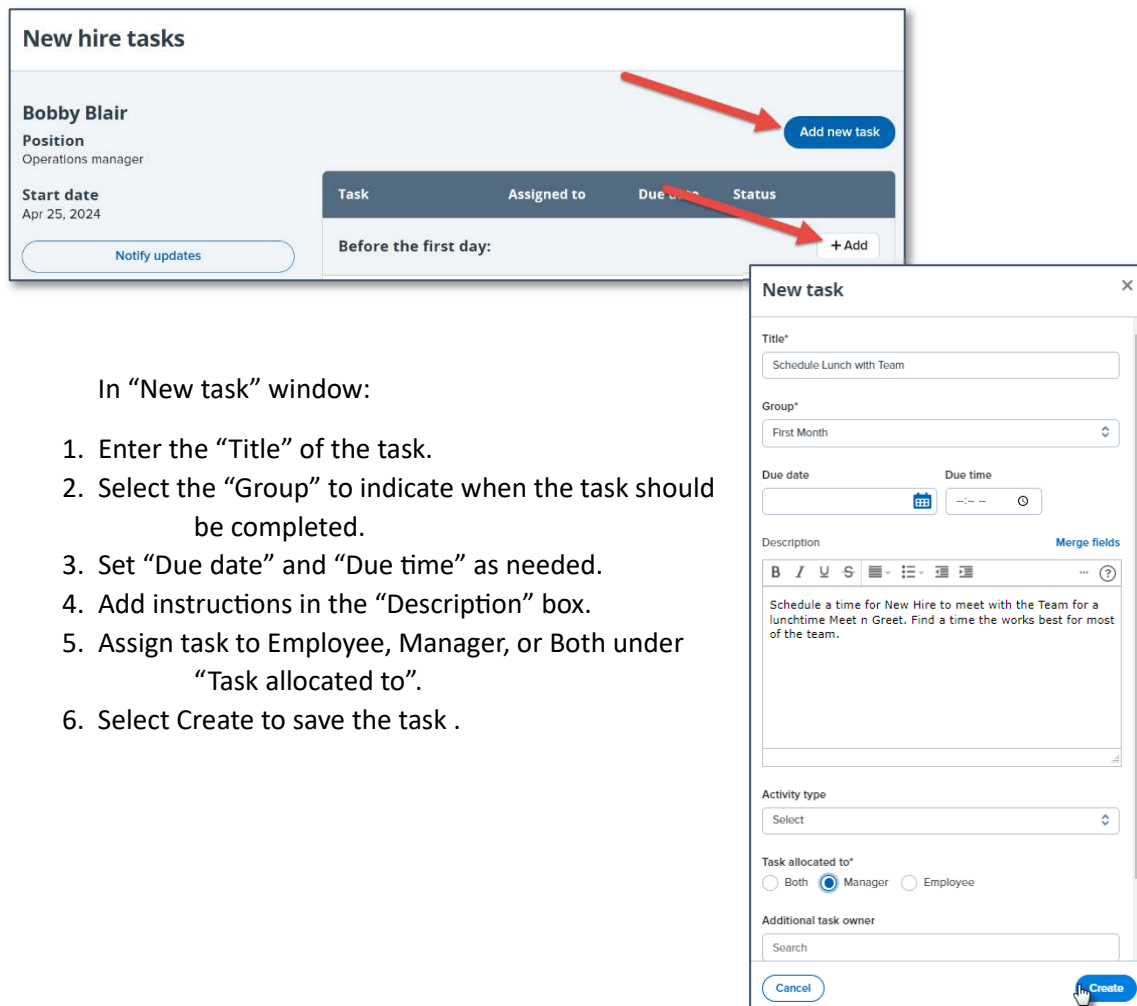5. Delete a task.
6. Add optional task.

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.

Add New Tasks

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

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 .

Notify employee of updates

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

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

Edit Task

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

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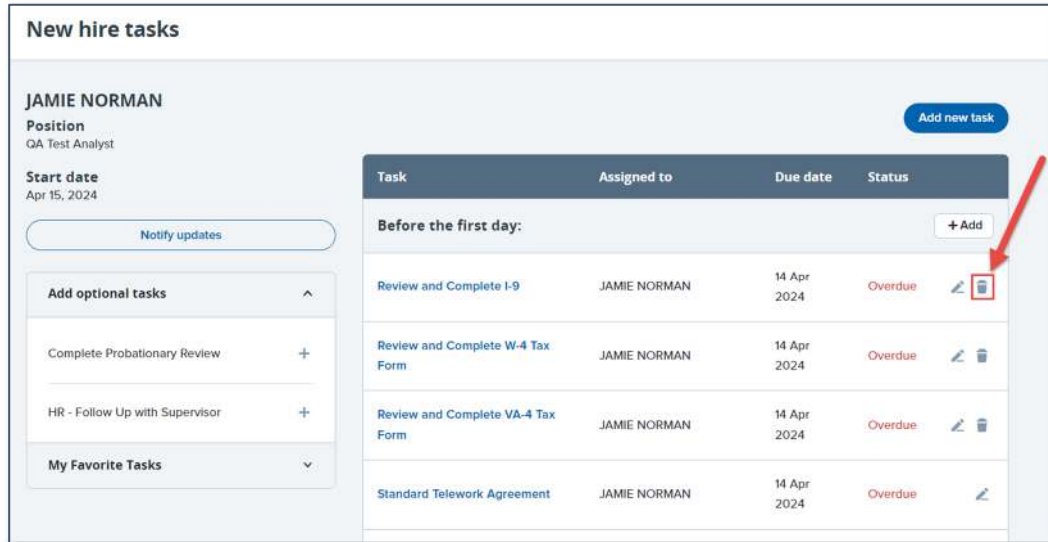
Delete Task

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.

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.

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.