Managing the Onboarding Process

- **What is onboarding?**
  - Are all applicants sent to onboarding?
  - Who is assigned tasks in onboarding?
  - Who manages onboarding for a new employee?

- **Managing the onboarding process**
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What is onboarding?

This is a really exciting feature in the PageUp Recruitment System. The onboarding portal personally welcomes new employees, assigns tasks, and gives access to other important information and links that will be beneficial to new employees. This is a great way to help share and gather information from the employee as well as setting up some expectations. The specific details will change based on the needs of Human Resource and other areas on campus that support setting up a newly hired employee.
Are all applicants sent to onboarding?

There are five options that determine the onboarding portal access and what tasks are assigned to new hire.

1. Current Employee – No change in employment status
2. Current Employee – Moving to a benefit eligible position
3. New Employee – Not a current employee
4. New Temporary Employee – No benefits
5. Office Pool – No access to onboarding

Who is assigned tasks in onboarding?

Some of the onboarding tasks are preset by Human Resources, but the Hiring Manager has the ability to add additional tasks.

Who manages onboarding for a new employee?

The Hiring Manager is responsible for managing the onboarding tasks for new employees. Some tasks are preset and need to remain part of the onboarding process, but the Hiring Manager has the ability to add additional tasks for the employee to complete and can help keep the employee on track in completing the tasks. Please note the tasks are assigned based on the start date entered on the offer card. Please contact your HR Recruiter if the start date needs to be changed.

Managing the Onboarding the Process

- From the sidebar, select “My new hires.”
From this screen, you will see all of the new hires that you are managing new hire tasks for.

Select “view all tasks” next to the new hire that you would like to view. This will take you to the New Hire Tasks screen.
• The **New hire tasks** screen is made up of the following:
  
  1. The applicant/requisition details
  2. Employee tasks
  3. Hiring Manager Tasks
  4. The symbol legend

• The **applicant/requisition details**

![Applicant/Requisition Details](image)

• **Employee tasks**

![Employee Tasks](image)
• Hiring manager tasks

![Hiring manager task list]

- **Before your first day**
  - **Add new task**
  - New employee Setup for Access to Campus Privileges
    - Completed: 29 May 2014, 9:29pm
  - Employee Parking
    - 15 Apr 2014 - Overdue
  - Required New Employee Setup Forms
    - 10 Apr 2014 - Overdue
  - New Employee Orientation Registration
    - 17 May 2014 - Overdue
  - Office Setup
    - 3 Apr 2014 - Overdue

- **Your First Week at UA**
  - **Add new task**
  - Job Description Review
    - 17 Apr 2014 - Overdue
  - ACTCard
    - 17 Apr 2014 - Overdue

- **Your First Month at UA**
  - **Add new task**
  - First Six Months
    - **Add new task**
  - Introductory Period Review
    - 14 Sep 2014

• The symbol legend

![New starter hire actions]

- **Add new task**
- **Delete**
- **Edit**
- **Hiring manager task**
- **Employee task**
- **Group task**
- **Draggable task**
- **Complete task**
To view the details of an assigned task.

- Click on the task, to view the details of an existing task. The details will then appear in a pop-up box, where you can either view and close or mark as complete.

To edit an assigned task, click the “edit task symbol” next the task you would like to edit. Enter in your changes and save.
• **To add** a new task, click the “add new task symbol” next to the time period you would like for the task to appear (before your first day, first week, first month, first six months). Then fill out the new task form and save.

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To add a new task, click the “add new task symbol” next to the time period you would like for the task to appear (before your first day, first week, first month, first six months). Then fill out the new task form and save.

1. **Enter a title**
2. **Select when you would like the task completed** (before your first day, first week, first month, or first six months) and then select the date.
3. **Enter in the details of the task.**
4. **Determine who this task should be assigned to** (employee, hiring manager, or both).
5. **If this is a task that you would like to assign for every new hire, add the task as a favorite, by checking the “Add to favorites” check box.**
6. Click “save” to save and close the new task window.