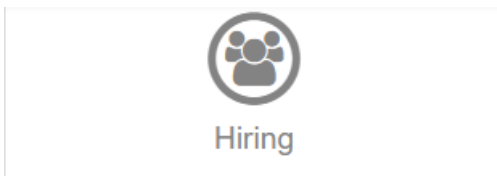


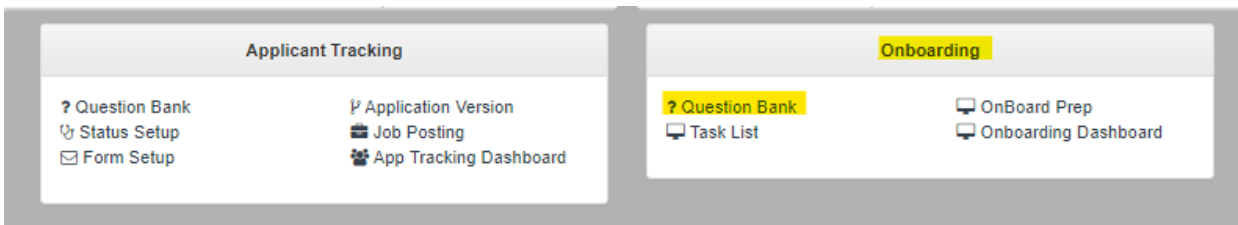
New Employee Onboarding Setup

- 1.) Activate/inactivate or Change/Create Onboarding Questions in the Onboarding Question Bank.
- 2.) Setup Onboarding Task List for each position, (can use same list for multiple positions).

Click on Hiring from your HR Dashboard



You will see the dropdown box. Click on ?Question Bank



You will see a list of questions that have been created for use during the Onboarding process. You have the option of changing the sequence, (order of appearance during Onboarding), making a question active/inactive by clicking on Yes/No, creating a new question or deleting a question

Question Bank ?

+ New Download filter grid...					
Actions	QuestionTitle	Question Type	Question Text	Sequence	Active
	AM/PM	Multiple Choice	Do you prefer morning or evening shifts? ...	10	No <input checked="" type="button" value="Yes"/>
	What do you like to do in your free time?	Free Form Text	What do you like to do in your free time? ...	30	No <input checked="" type="button" value="Yes"/>
	What is your favorite color?	Free Form Text	What is your favorite color? ...	20	No <input checked="" type="button" value="Yes"/>
	What is your favorite place to eat?	Free Form Text	What is your favorite place to eat? ...	25	No <input checked="" type="button" value="Yes"/>
< 1 > Page: 1 of 1 Go Page size: 4 Change Item 1 to 4 of 4					

To create a New Question, click on



Save Changes

 Save Changes Save & Next Record 

Close X

NEW RECORD Save Changes

Save & Next Record

Close X

Question Bank ?

[+ New](#) [↺](#) [Download](#)

filter grid...

Y

Actions	QuestionTitle ▲	Question Type	Question Text	Sequence	Active
	AM/PM	Multiple Choice	Do you prefer morning or evening shifts? ...	10	No Yes
	Corporate Training vs. Job Training	Multiple Choice	Which would you like to complete first? ...	35	No Yes
	What do you like to do in your free time?	Free Form Text	What do you like to do in your free time? ...	30	No Yes
	What is your favorite color?	Free Form Text	What is your favorite color? ...	20	No Yes
	What is your favorite place to eat?	Free Form Text	What is your favorite place to eat? ...	25	No Yes

Page: 1 of 1 Go Page size: 5 Change

Onboarding Task List



Hiring

```

graph LR
    subgraph Applicant_Tracking [Applicant Tracking]
        Q1[? Question Bank]
        S1[🔧 Status Setup]
        F1[✉ Form Setup]
        A1[📄 Application Version]
        J1[📁 Job Posting]
        AD1[📊 App Tracking Dashboard]
    end
    subgraph Onboarding
        Q2[? Question Bank]
        TL[📋 Task List]
        OP[💻 OnBoard Prep]
        OD[💻 Onboarding Dashboard]
    end
    Applicant_Tracking --> Onboarding
  
```

You will see the Onboarding Task Lists that have been created

Onboarding Task List 

+ New Download filter grid...		
Actions	Title	Description
	CEO/COO OTL	CEO/COO Onboarding Task List.
	FT EE OTL	Full Time Employee On Boarding
	HR OTL	HR Onboarding Task List
	Manager OTL	Manager Onboarding Task List
Page: 1 of 1 Go Page size: 4 Change Item 1 to 4 of 4		

To create a new Onboarding task list, click on 

Complete the fields highlighted in yellow.

Save Changes

Save & Next Record

Prev Record

Next Record

Close

Onboarding Task List: **PT EE OTL**

Company

Company

Ginger's Pet Care (GMPC)

Task List

Title

PT EE OTL

Description

Part Time Employee Onboarding Task List

Document Upload Request Note

List Documents

Please upload a color copy of your drivers license.
Please upload a copy of a voided check.

Steps

Mark and setup the sections below that you want included in this onboarding task list

No

Yes

Include Welcome Note

No

Yes

Include Direct Deposits

No

Yes

Include W-4

No

Yes

Include I-9

No

Yes

Include WOTC [New Signup Here!](#)

No

Yes

Include Company Documents

Select/Change Company Documents

Test Document for Signature _1.docx; Test Document for Signature _2.docx

Saved Company Document Selection

Select/Change Custom Forms

Florida Panthers - Mutual Arbitration Policy; Florida Panthers - RITW Prev 319

Saved Custom Form Selection

Form Name

Florida Panthers - Mutual Arbitration Policy

Florida Panthers - RITW Prev 319

No

Yes

Include Background Check Authorization

No

Yes

Include Custom Questions

No

Yes

Include Document Upload Request

No

Yes

Include End Note and E-Signature

Click on each question you want to send and then click on Link Question

Custom Question Selection

Please Choose (represents BLANK)

AM/PM - (Multiple Choice)

Corporate Training vs. Job Training - (Multiple Choice)

What do you like to do in your free time? - (Free Form Text)

What is your favorite color? - (Free Form Text)

What is your favorite place to eat? - (Free Form Text)

Choose Question and LINK to this task list

Link Question

After clicking on the Link Question box, you will see that your question has been linked

Page 3 of 9

Custom Question Selection

Please Choose (represents BLANK)

Choose Question and LINK to this task list

Link Question

Linked Questions

Question Title	Type	Sequence
What is your favorite color?	Free Form Text	20

Create a Welcome and End Note and click on **Save Changes**

Welcome and End Notes

Welcome Note

Welcome Note

Welcome! We are very pleased that you are joining our team.
Please continue to complete your onboarding.

End Note

End Note

Thank you for completing your Onboarding.
Your manager or Human Resources will be in touch with you soon for next steps.

Onboarding Task List: **PT EE OTL**

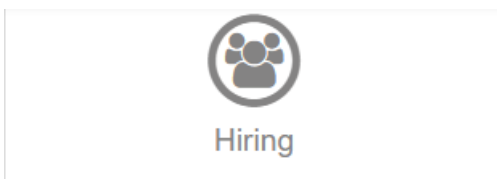
Save Changes Save & Next Record Prev Record Next Record Close

You can use the same Onboarding Task List for all your New Hires, or you can create different Onboarding Task Lists for each position.

Onboarding Prep

When you are ready to hire an applicant, you need to complete their Onboarding Preparation. To complete this process, you need to change the status of the new hire's application in Applicant Tracking to Prep for Onboarding and click Save Changes.

From your HR Dashboard, click on Hiring



You will see the dropdown box again, click on App Tracking Dashboard

Applicant Tracking	Onboarding
? Question Bank 🔗 Status Setup ✉ Form Setup 📄 Application Version 📄 Job Posting 📄 App Tracking Dashboard	? Question Bank 🖨 Task List 🖨 OnBoard Prep 🖨 Onboarding Dashboard

Click on the wheel under actions again and change the status to Prep for Onboarding. Click **Save Changes** when you are done.

Save Changes

Save & Next Record

Prev Record

Next Record

Close

Job Posting - Ginger's Pet Care

Manager

Manage day to day operations and oversee employees and care of animals

Status	Name	Email
Offer Accepted	Kelli Lynn	klynn@idhrptest.com

Change Status

If you need to update the status of this application, this is the place to do it. If the new status has a workflow attached, you will be prompted for additional information depending on the workflow.

Prep for Onboarding - Prep for Onboarding

Prep for Onboarding

Clicking SAVE below will direct you to the Onboarding Prep screen to complete all the details associated with getting this applicant ready for the onboarding process.

Workflow Note

Onboarding Prep process initiated.

Save Changes

Save & Next Record

Prev Record

Next Record

Close

As soon as you click Save Changes, a popup window will open launching the Onboarding process

You must select the Onboarding Task List that you want to use, the Tax Form, Position will populate from the application, (you can change it if needed), add the hire date and the Employee ID will generate, (but you can change it if needed)

OnBoarding Prep Process

Prep Employee for OnBoarding

STEP 1 - Type of Hire

The information below helps to guide you through the rest of the OnBoarding process.

Company

Ginger's Pet Care (GMPC)

Onboarding Task List

Manager OTL -

Tax Form (Type of Hire)

W2 - Employee

Position

MGR - Manager

Hire Date

02/16/2022

Employee ID

220

Let's begin OnBoarding

Complete the highlighted information below

STEP 2 - Fill out Employee information
Complete each section. Don't worry, we'll tell you if you forget anything important.

Profile

Contact

First Name

Kelli

✓

Last Name

Lynn

Email

 klynn@idhrptest.com

Compensation

Pay Type +

S - Salary

✓

Pay Frequency +

B - Biweekly

✓

Rate

\$ 53,000.0000

✓

Default Hours

 80

✓

Benefits

Eligibility

Benefit Class / Eligibility Group

FT - Full Time

▼

Special Enrollment ⓘ

Assign to Special Enrollment

New Hire - 1/1/2022

▼

Enrollment Reason

NE - Newly Eligible

▼

Requested Enrollment Invitation Date

02/16/2022

✓



Benefit/Plan Start Date

03/01/2022

✓



Complete the fields highlighted in yellow. Fields highlighted in blue, populate from application, fields highlighted in green are optional

Employment

Position/Status

Employment Type +

RFT - Regular Full Time

✓

Status +

A - Active

✓

Eligible for Rehire

No

Yes

Organization

Division

RET - Retail

▼

Department

HR - Human Resources

▼

Compliance

EEO Category

EE02 - EE02

▼

Worker Comp Code +

12910 - Pet care (except veterinary) services

▼

Pay Group +

GRP - Pay Group 1

▼

SOC Code (type to search)

type to search

Reports To/Supervisor

Reports To 1

Moore, Lorene (1)

▼

Reports To 2

Please Choose (represents BLANK)

▼

Reports To 3

Please Choose (represents BLANK)

▼

Supervisor [SC] ⓘ

Supervisor (SC)

Click on Quick Add User

User

Select existing user (type to search)

 type to search

×

Quick Add User

You will receive a popup box. Complete field highlighted in yellow. Fields highlighted in blue populate from the application. Field highlighted in green is optional



Quick Add User



Remember that usernames (emails) must be unique to the system. We will verify that your new user isn't already being used.

This is meant as a quick way to add a user to the system with the most important fields. If other details about the user are to be entered, please visit the User List page after completion here to review or add those other details.

User

Username 

 klynn@idhrptest.com

TFA Active

No

Yes

Send Welcome Email

No

Yes

Assign a Role

GMPC - BaseManager (Level=25)

Contact

First Name

Kelli

Last Name

Lynn

Timezone

Eastern (US and Canada) (UTC-05:00)

 Add User

This section is optional

User Defined/Custom

Memo 1

Memo 1 

Memo 2

Memo 2

Memo 3

Memo 3

When you have finished adding the information and you are ready to save the information, Click Submit Onboarding Request

Submit Onboarding Request 

Submit Onboarding Request and start another 

I did something wrong. Let me start over 

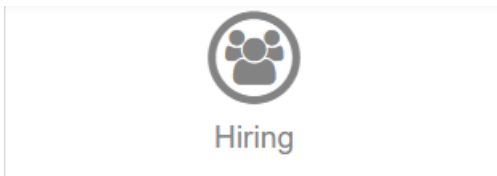
The new employee will receive a Welcome to Onboarding email

When the employee clicks on the link, they will be taken to their Onboarding, and they will click on Begin Onboarding

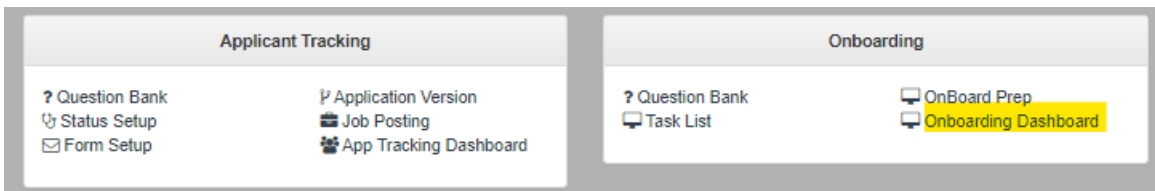
See New Hire Onboarding Experience

When the new employee has completed their Onboarding, HR must review and approve their submission.

Click on Hiring from your HR Dashboard



Click on Onboarding Dashboard



You will see your New Hire's Status is ready for Approval or to Reset Status to send it back to the New Hire for any corrections that need to be made.

OnBoarding Dashboard

OnBoarding Prep		Download		filter grid...		Advanced Filter	
Actions	NameID	EmailAddress	Status	Hire Date	Tax Form	Position	Employment Type
	Lynn, Kelli - (220)	klynn@ohrpctest.com	Requires Approval - 02/24/2022 08:14 AM Approve Reset Status	02/16/2022	W2	MGR	RFT
Page: 1 of 1 Go Page size: 1 Change		Item 1 to 1 of 1					

When you click on Approve, the New Hire is now an employee in the system and is removed from the Onboarding Dashboard

OnBoarding Dashboard

OnBoarding Prep		Download		filter grid...		Advanced Filter	
Actions	NameID	EmailAddress	Status	Hire Date	Tax Form	Position	Employment Type
No Records							
Page: 1 of 1 Go Page size: 1 Change		Item 0 to 0 of 0					

The employee will receive a Welcome email to change their password

To review your new employee's file, navigate to the employee search at the top and type their first name or last name and their name will pop up to select.

