Onboarding Tasks for Managers & Delegates

Introduction

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

Each recruitment process 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 manager, you need to manage your new hire's onboarding task progress and provisioning. You will also complete onboarding tasks yourself.

What you will do

- View new hires
- View new hire tasks
- Manage new hire tasks
- Complete new hire tasks
- Add a task

View new hires

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

When to view new hires

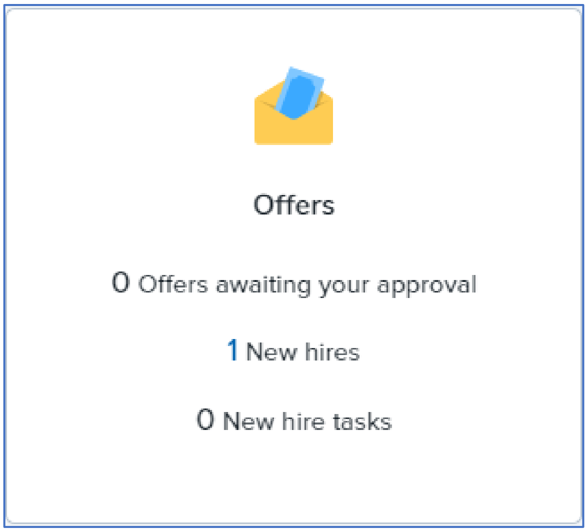
You can view new hires whenever you have new employees who need to complete onboarding tasks.

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 hires

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



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

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

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

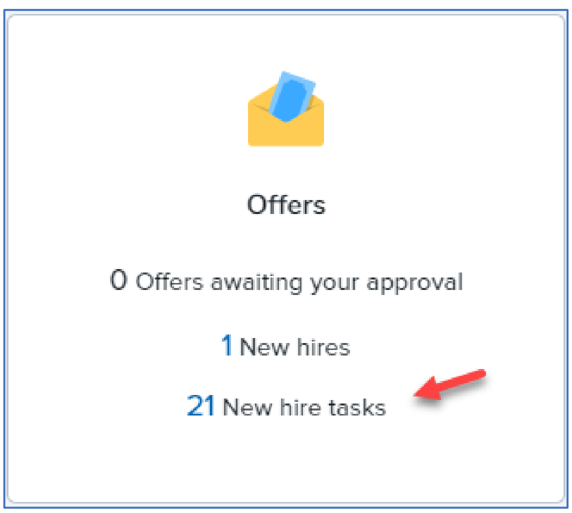
- You want to find tasks by task name or by employee.
- You want to complete tasks in bulk.

Prerequisites and assumptions

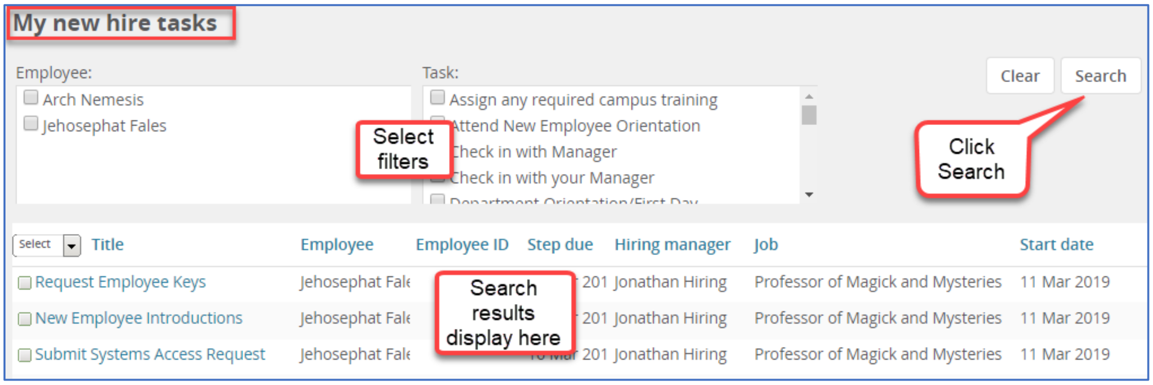
- You can access the Hiring Manager Dashboard.
- You have been designated as the person the new hire reports to on the offer card.

How to view new hire tasks

1. From the hiring manager dashboard, click **New hire tasks** on the Offers tile. **My new hires tasks** page opens, showing tasks for your new hires. **New hire tasks** can also be accessed via the recruiter dashboard and the main menu.



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

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

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

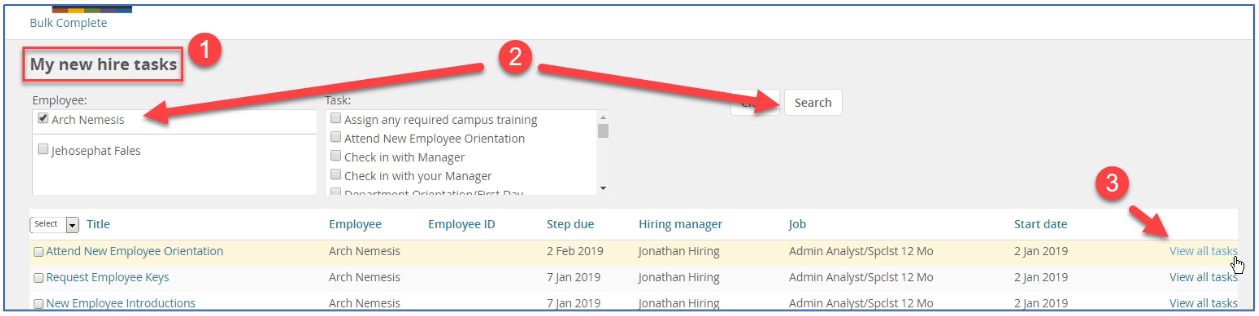
- You want to track a specific employee's progress through the onboarding workflow.
- You need to assign a new onboarding task.

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.

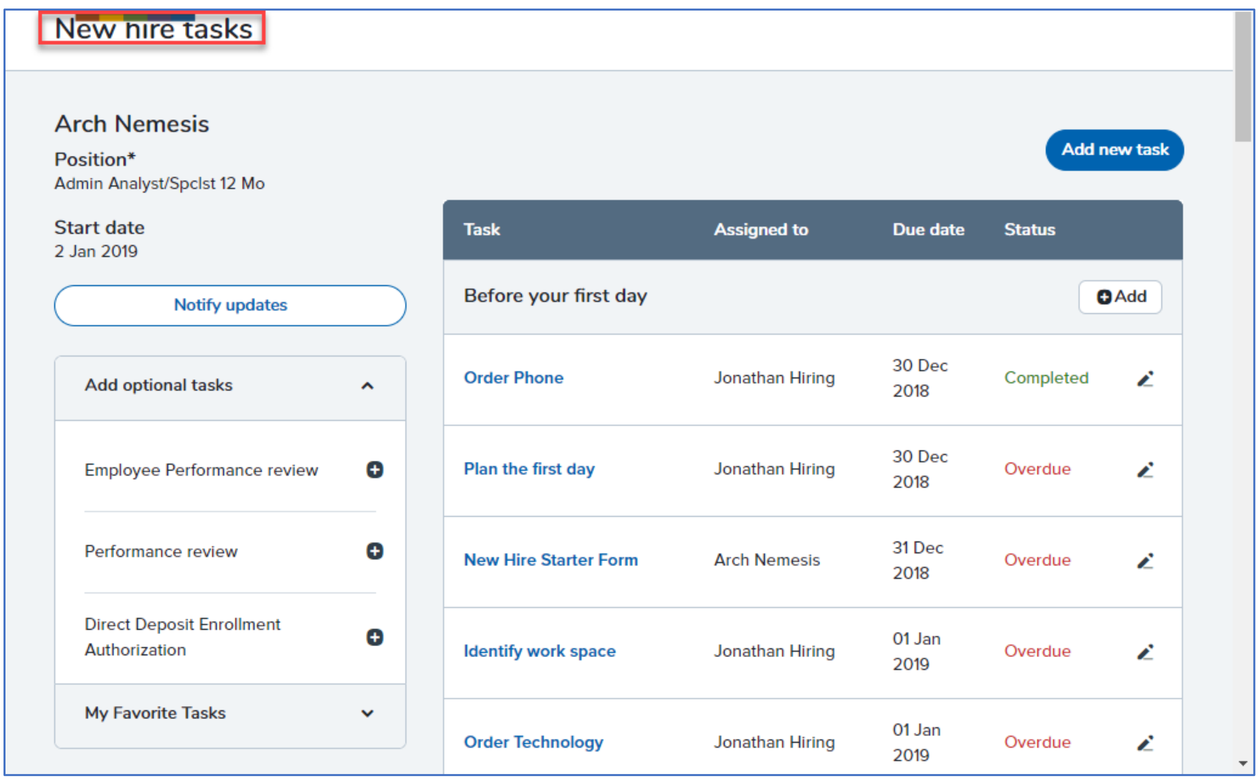
How to manage new hire tasks

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



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.



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.

Complete new hire tasks

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

Mark tasks as completed after the actual task is finished.

Prerequisites and assumptions

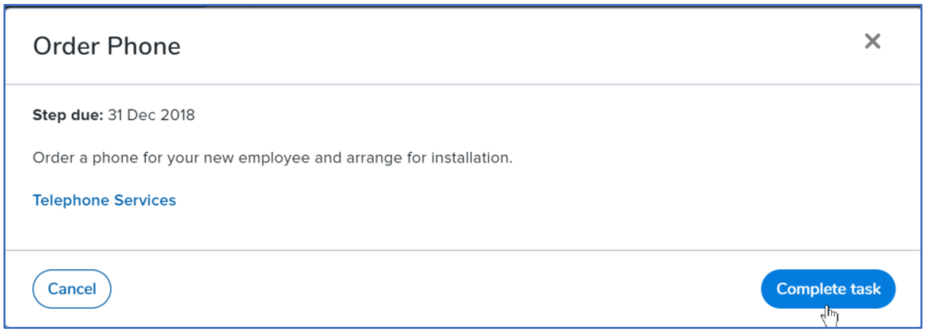
- The task has been done.
- You can access **New hire tasks**.
- You can access **My new hire tasks**.
- You have been designated as the person the new hire reports to on the offer card.

How to complete new hire tasks

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

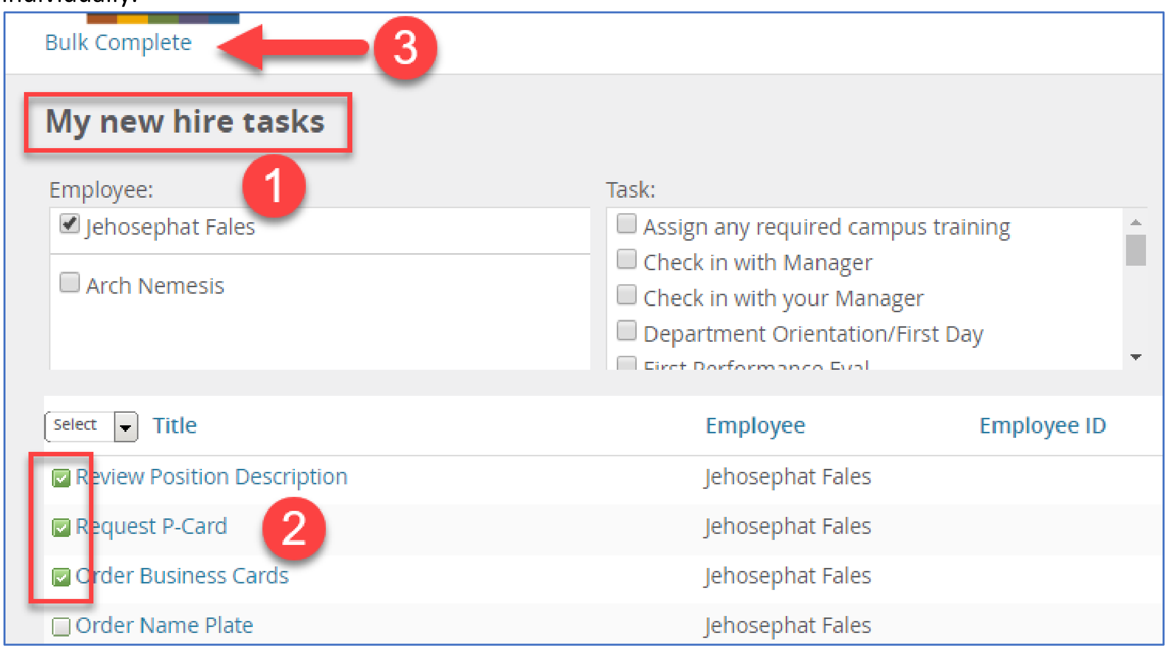
3. Do the task, using any information provided. In this example: ordering a phone.

4. Click **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.



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**.

Add a task

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

When to add a task

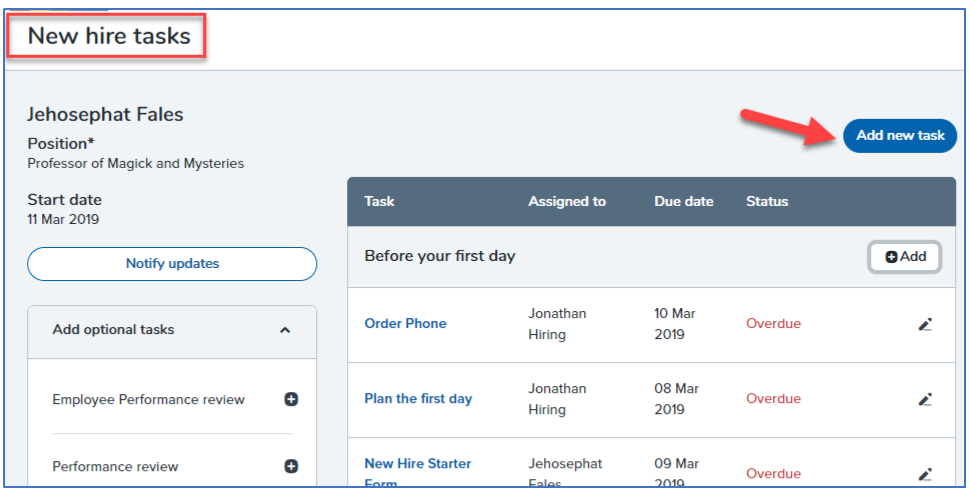
- The applicant has special needs or requirements.
- You need to assign a task to yourself or another user.

Prerequisites and assumptions

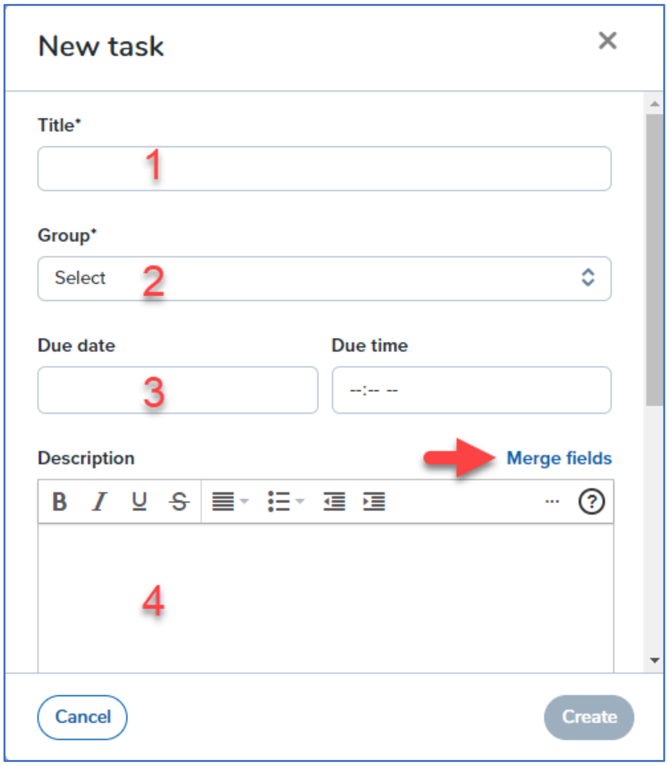
- You can access **New hire tasks**.
- You have been designated as the person the new hire reports to on the offer card.
- You have permission to add tasks.

How to add a task

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

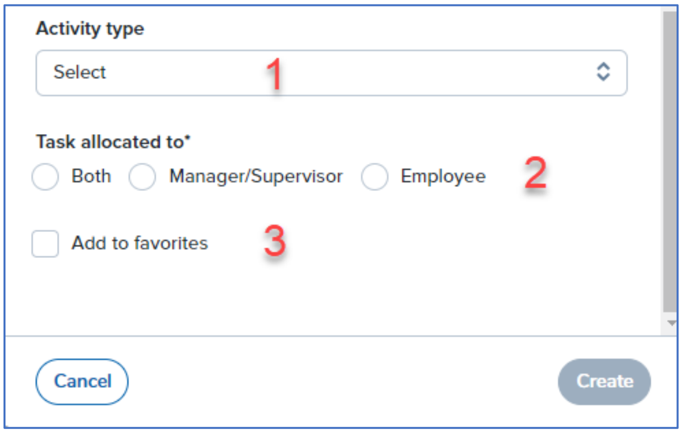


3. Complete the **New task** form using the following screen captures and data.



#	Field	Information
1	**Title***	Enter the title of the task. This is a mandatory field.
2	**Group***	Which group does the task belong to? Examples: First day, first week. This is a mandatory field.
3	**Due date and Due time**	Enter the due date and time for task completion.
4	**Description**	Use the rich text editor to specify what the user needs to do to complete the task. • Click the ellipses icon […] in the toolbar to see more text editing options. • You can include hyperlinks to forms or other resources that the user needs to complete the task. • You can use the **Merge fields** link to see a list of merge field that you can use for writing the task description.

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



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

5. Click **Create**.

What happens next

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