OnBoarding Process

Recruiting Solutions
Advantages

- **OnBoarding** helps to streamline and shorten a new employee's transition into a new job
- Adding documents can take much of the paper that is given to a new employee and allow it to be accessed electronically
- Make things easier for you and new employees
- Can be customized to fit your needs
- Can have multiple **OnBoarding Activity Guides** for various types of employees – Staff, Faculty, Students

NDSU NORTH DAKOTA STATE UNIVERSITY
OnBoarding Activity Guide
Activity Guide

How do I access the Activity Guide?

View **New Hire Approve/Review Screen**

- After manager has entered the hire and HR has approved it
- Once you click submit, an email will be generated and sent to your new employee

Email confirmation?
- **Claim Email** field will populate with the date sent
Your Activity Guide

• Customizable to fit your onboarding needs

• Decrease your paperwork!
  – Add an agreement or acknowledgment for employee
  – Add documents that you want your employees to download and/or sign
Acknowledgment Options

• The Acknowledgement can contain policy and disclosure information regarding your onboarding process and what your new employees will be completing in the next steps.

• The Acknowledgement can require new employees to agree to terms and conditions and to agree that they will respond truthfully to the information they are going to provide.
The Acknowledgement allows you to indicate that you will be gathering personal information during the onboarding process and note what that information will be used for.

You can add a link to terms and conditions that you may have for gathering this information.
Activity Guide – What to Add

Documents

• Add your new employee documents to the activity
  – Policy Handbooks
  – General campus policies that need acknowledgment or an e-signature
  – Information regarding the general campus community and the surrounding area
  – Other
Documents Example

Employees can:
• Download documents
• Acknowledge that they have downloaded/read a document
• Upload required documents
Document Actions - Status

None: A new employee will have the ability to download a provided document. No action is needed.

Acknowledge: A new employee must download a provided document, then acknowledge that they have downloaded and read the document.

Upload: A new employee must download a provided document, open the document and take the required action, then upload the document into the Activity Guide.
New Employee Actions

- If a new employee is required to upload or acknowledge documents, they will get a message that indicates the corresponding required action.
- An Employee will NOT be able to take action on step 2 (acknowledge/upload) without first downloading the document.
Document Groups

• Documents can be put into groups and created as different steps in the Activity Guide

• Examples:
  • Policy documents step
  • Community information step
Document Groups Naming

- You can name your document groups and steps
- This will help give new employees an idea of what these steps are in the activity guide
OnBoarding Status - Views
View Onboarding Status

Add the **OnBoarding Status** as a tile on your homepage.
Administrator View

- HR Administrators can view the **OnBoarding Status** of new employees
- Search for an employee by name or empl ID
- This is best used when looking for a specific employee
View OnBoarding Status

Summary

The steps for OnBoarding and their statuses are listed. If the employee has not completed the OnBoarding Process, you may use the "Remind Employee" button to send a reminder notification to the employee to complete it. You may also set the status of steps and the OnBoarding Process to complete.

Steps

<table>
<thead>
<tr>
<th>Step</th>
<th>Status</th>
<th>Required</th>
<th>Due Date</th>
<th>Date Completed</th>
<th>Completed By</th>
<th>Mark Complete</th>
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<tr>
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<tr>
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<td></td>
<td></td>
<td></td>
<td>Mark Complete</td>
</tr>
</tbody>
</table>
Employee Documents

- You can see the documents that need to be acknowledged or uploaded in the OnBoarding Activity Guide.
- Documents that new employees have uploaded can be viewed and downloaded in this screen.
- Documents that new employees need to acknowledge will have a date and time stamp of when they were acknowledged.
- **Navigation:** Set Up HCM=>Common Definitions=>OnBoarding=>Employee Documents