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.**

The Onboarding Process includes:

- ✓ Activating onboarding in the offer card
- ✓ Viewing and accepting the offer
- ✓ Employee New Hire Tasks
- ✓ Viewing Confidential Documents
- ✓ Manager/HR new hire task management

Activating Onboarding

In the offer card, complete the following ***Onboarding Details*** fields to activate onboarding:

A. **Onboarding Form** – "New hire form"
B. **Onboarding Workflow** - "Onboarding"
C. **Reports to Manager** - Manager/Supervisor the new hire is reporting to.
D. **HR Rep/Onboarding Specialist** - Agency HR Rep responsible for overseeing the onboarding process (if applicable)
E. **HR Rep/Onboarding Specialist 2** - Secondary agency HR Rep responsible for overseeing the onboarding process (if applicable)

NOTE: The **Onboarding Specialist** is a permissioned role that gives a user access to confidential onboarding documents like the new hire form & other onboarding forms (I-9, W-2, and VA-4). An access request must be submitted to RMS Inquiry to be granted this permission.

Complete the remaining steps of the offer process as shown in the Offer Process Guide.

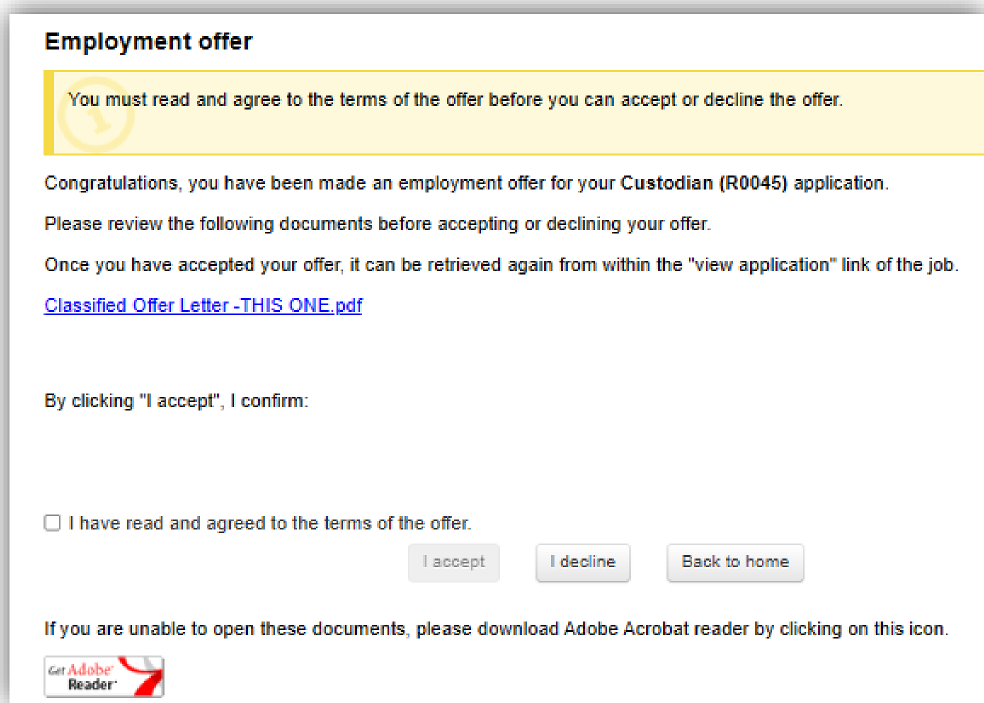
Viewing and Accepting the Offer

When the applicant receives the offer email from the PageUp system, they are prompted to login to their applicant portal to view the offer.

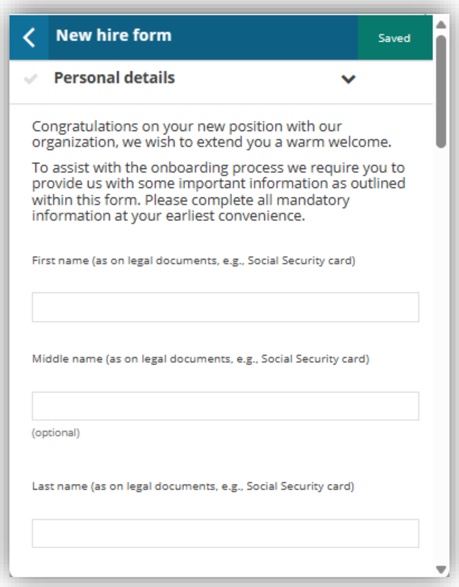
A yellow banner displayed at the top of the screen contains a hyperlink stating, "**View Offer**".

Published: 05.08.2024 | **Last Updated:** 09.08.2026

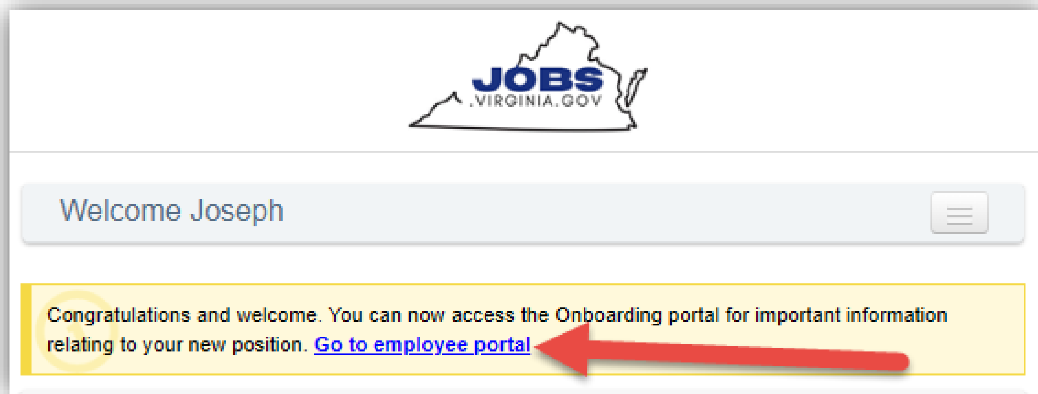
All the offer documents must be opened **AND** the checkbox next to statement "I have read and agreed to the terms of the offer" must be selected, prior to offer acceptance.



Once the offer is accepted, a pop-up window with the **New Hire Form** will load for them to complete. If they are unable to finish the form, they can exit and complete it later. There will be a link in their applicant portal until the form is submitted.

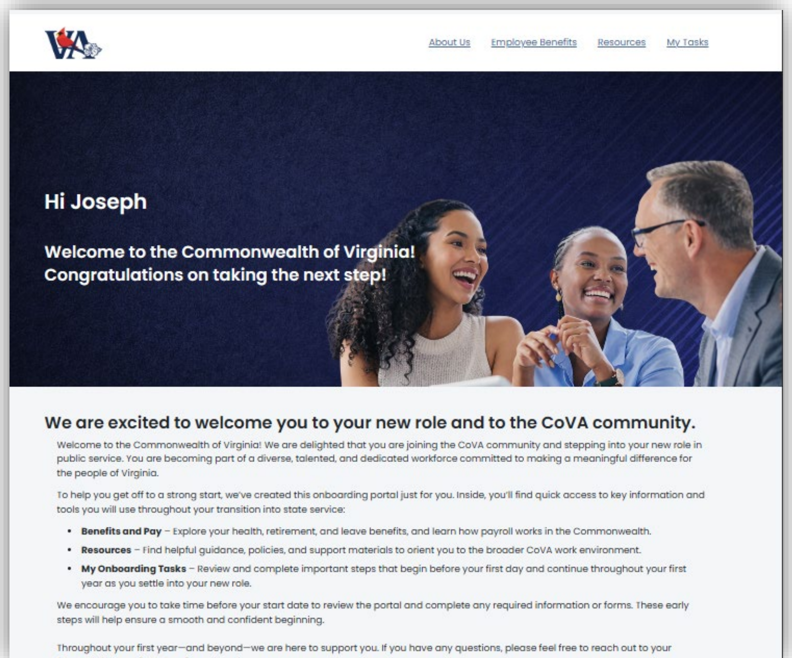


Additionally, there will be a link to the New Hire's onboarding portal in their applicant portal. For access, they must select the "**Go to employee portal**" hyperlink in the yellow banner at the top of the screen.



The Onboarding Portal includes:

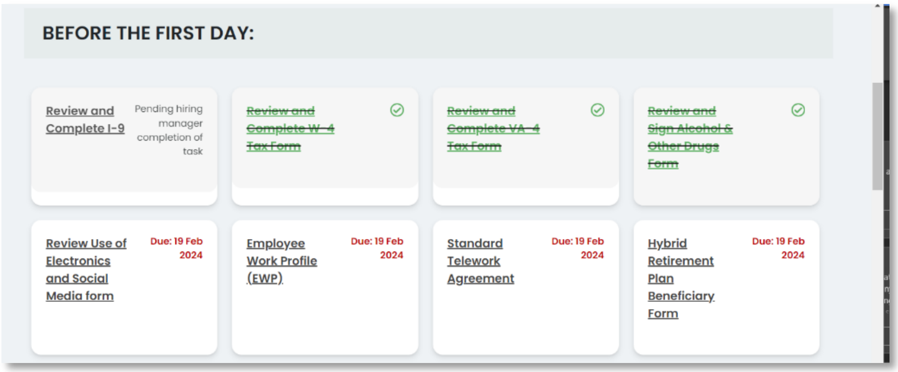
- ✓ Personalized welcome and guidance
- ✓ Benefits and Pay resources
- ✓ Quick Links to employee resources (ex. Cardinal, COVLC, HR Policies, Employee handbook, etc.)
- ✓ Onboarding Tasks



Employee New Hire Tasks

The new hire can access onboarding tasks by selecting the "**My Tasks**" tab at the top of the portal screen.

The tasks are grouped by the time frame in which they need to be completed in their first year (before the first day, first day, first week, etc.). Each task will have a due date and show the task title as green and struck through when completed. One reminder email is sent to the employee when a task is close to the due date.



On completion, HR Reps/Onboarding Specialist and/or Hiring Manager's *New Hire Tasks* management screen will show the status of "Completed". There is **no email** sent to the task managers when a task is complete.

Uploading documents

Some tasks allow for the uploading of signed documents. Within the task, there will be a button labeled "**Open**". Once selected, the new hire will search for the digital document on their device and upload it into the task. By clicking "**Submit**", the document is saved and the task is marked as complete.

Uploaded documents can be accessed by the HR Reps/Onboarding Specialist and/or Hiring Manager's through the individual's applicant card.

Acceptable document formats are *.doc,.docx,.docm,.pdf,.txt,.rtf,.xls,.xlsm*.

Viewing Confidential Documents

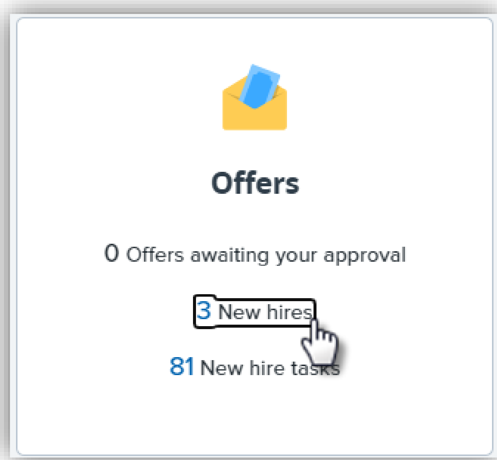
The following new hire documents are flagged as confidential due to sensitive information:

- ✓ New Hire Form
- ✓ I-9
- ✓ W-2
- ✓ VA-4

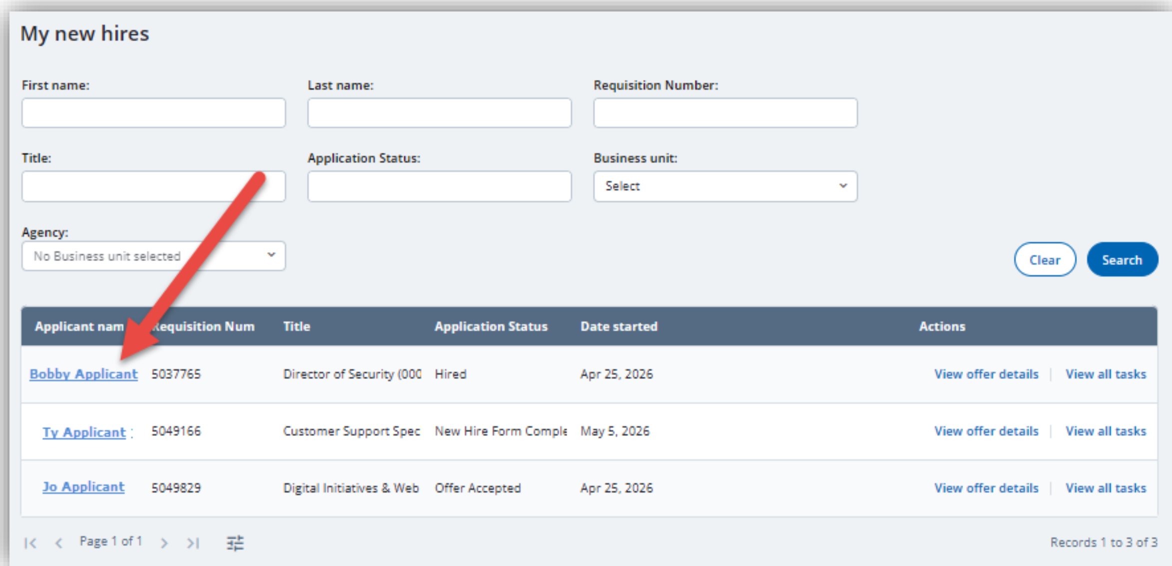
Only those with the Onboarding Specialist permission will have access.

The forms can be viewed through the applicant card as follows:

On the non-recruiter dashboard in the ***Offers* tile**, select "**New Hires**".

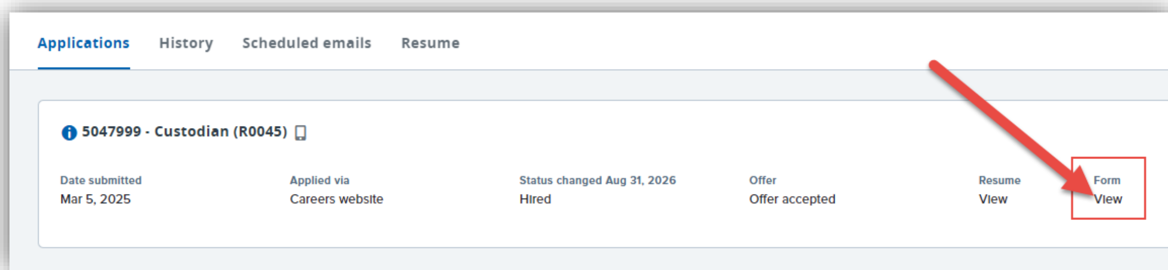


Click the name of the applicant to open the applicant card.

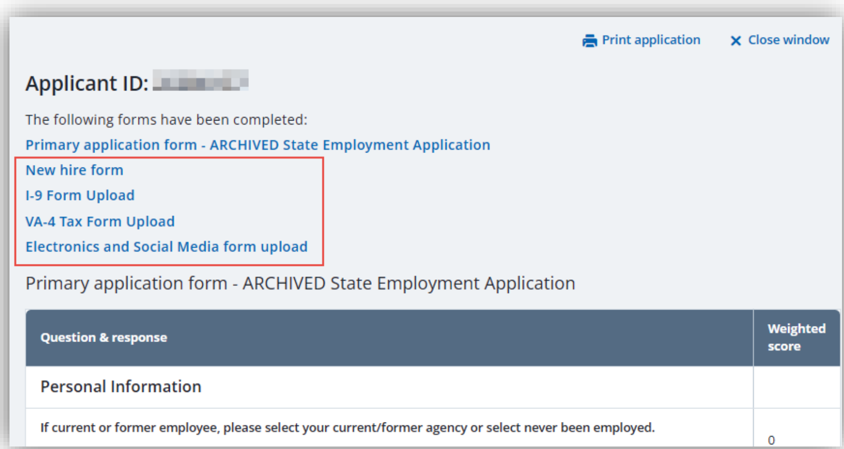


There are two ways to find the uploaded forms in the applicant card:

1. In the **Applications** tab, select “**View**” under the **Form** heading in the job.

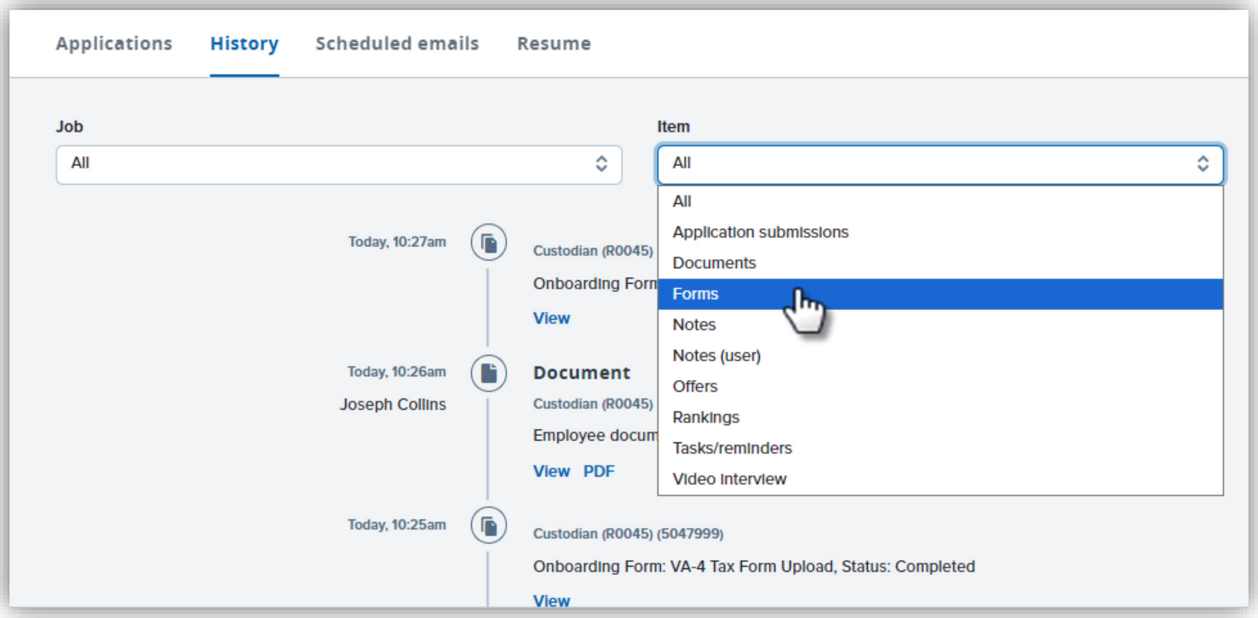


All the uploaded forms will be listed at the top of the page under the application. Each one has a hyperlinked title that can be selected to move quickly to the document.



2. In the **History** tab, historical actions on the applicant record will be displayed in the window. The logs can be filtered down to only show information for one job.

   From the ***Item*** dropdown, select "**Forms**".



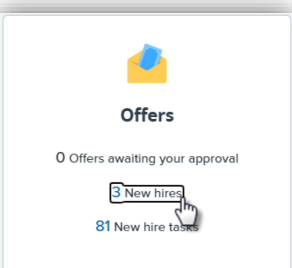
   Click "**View**" to open the applicant form window.

   Scroll to the form and click the document file name to download and view.

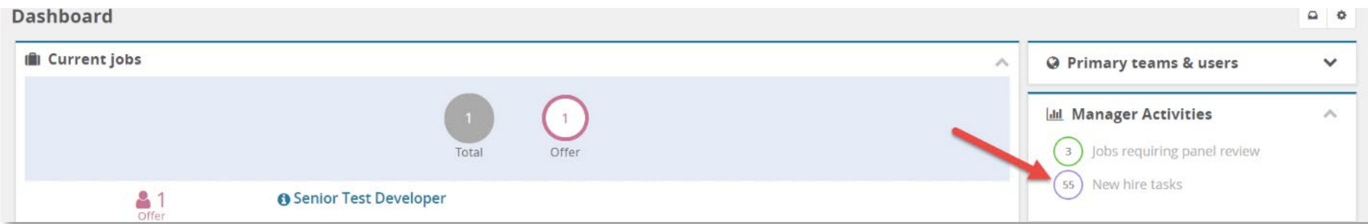
New Hire Task Management

HR Reps/Onboarding Specialists and/or Hiring Managers listed on the offer card can manage new hire tasks. A user's permissioned roles will determine the route to get to the management screen.

On the Non-Recruiter Dashboard in the ***Offers* tile**, select "**New Hires**".

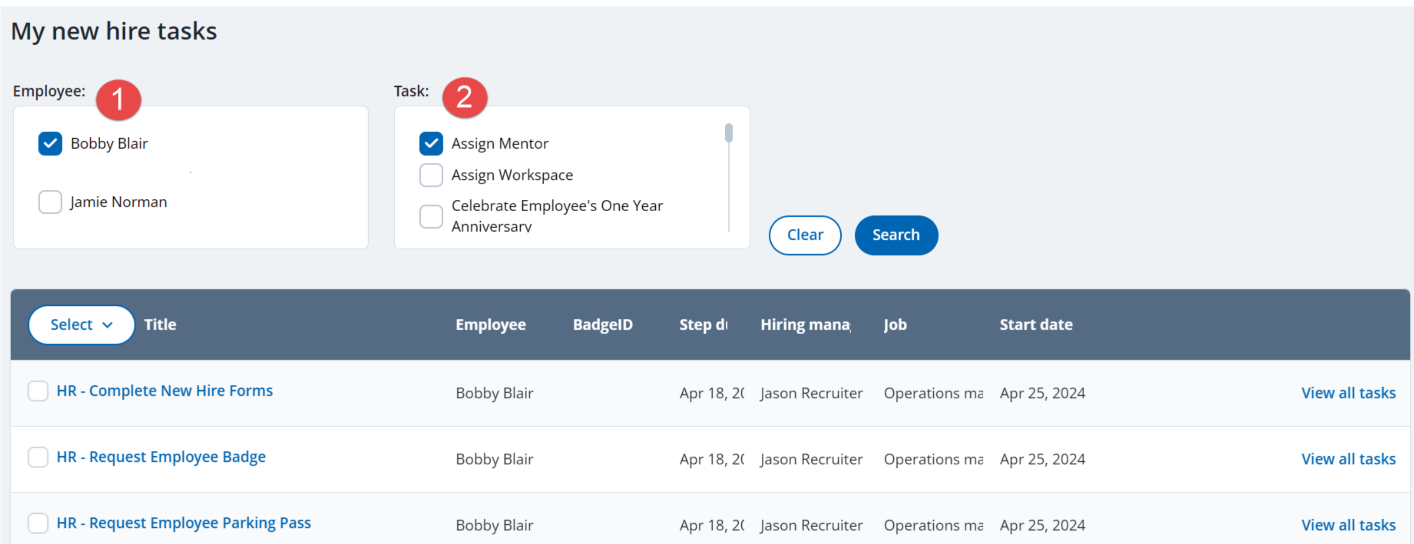


On the Recruiter Dashboard under *Manager Activities*, the "**New hire tasks**" item can be selected to view assigned or completed onboarding tasks that have been done by the Employee and Managers/HR Reps.



In the "**My new hire tasks**" window you can:

1. Choose specific employees
   and/or
2. Select specific tasks.



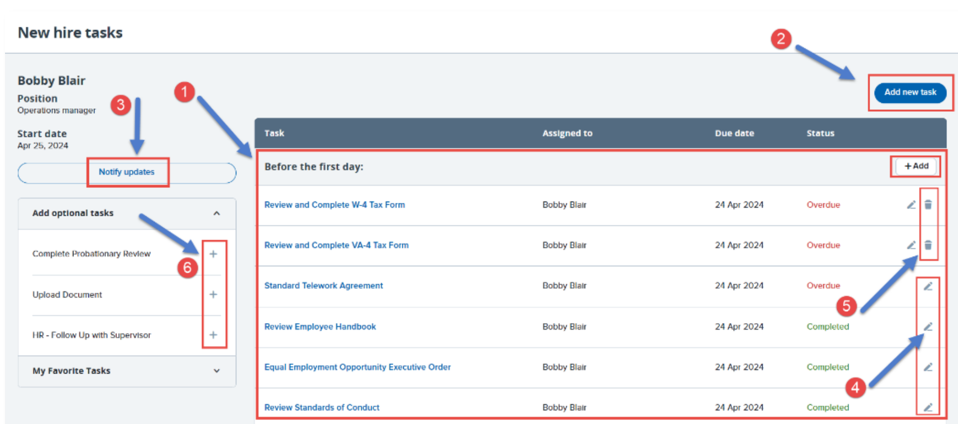
Filtering by task can be an easy way to review whether a task is complete.

Once your filter selections are complete, click **Search** to view the results.

Click **View all tasks** at the right end of the task row to see a complete listing of tasks per employee.

New Hire Task Management screen options:

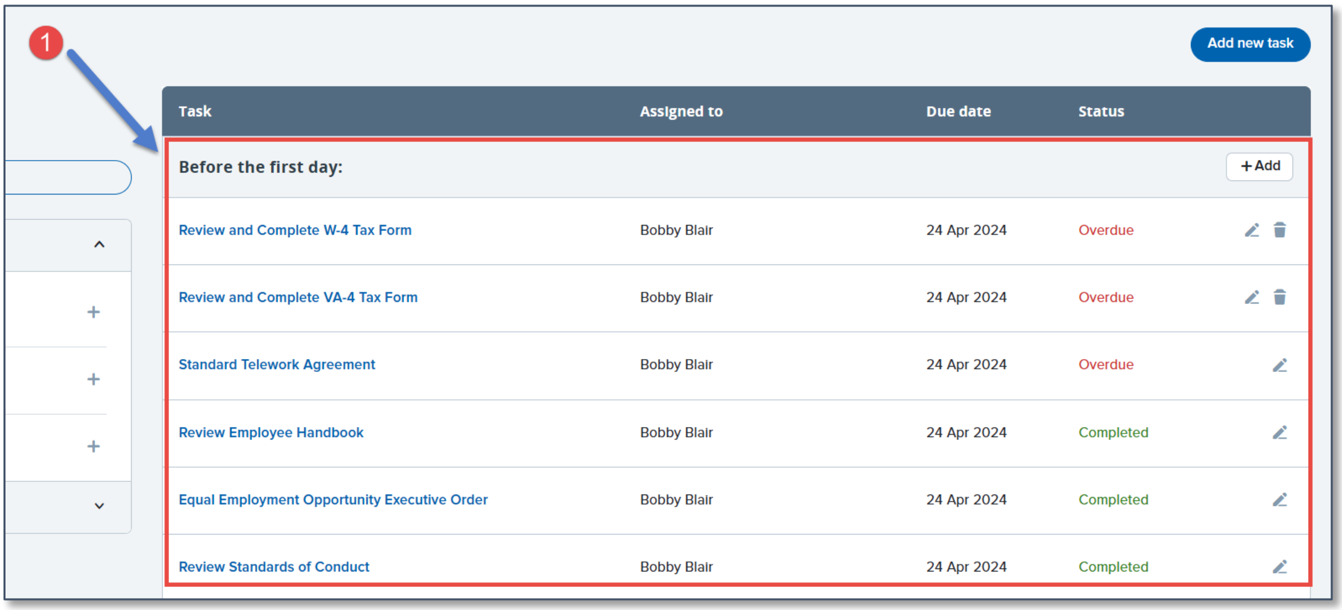
1. Review all tasks
2. Add new task
3. Notify employee of updates
4. Edit a task
5. Delete a task (*only onboarding specialist)
6. Add optional tasks



 Published: 05.08.2024 | **Last Updated:** 09.08.2026

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.

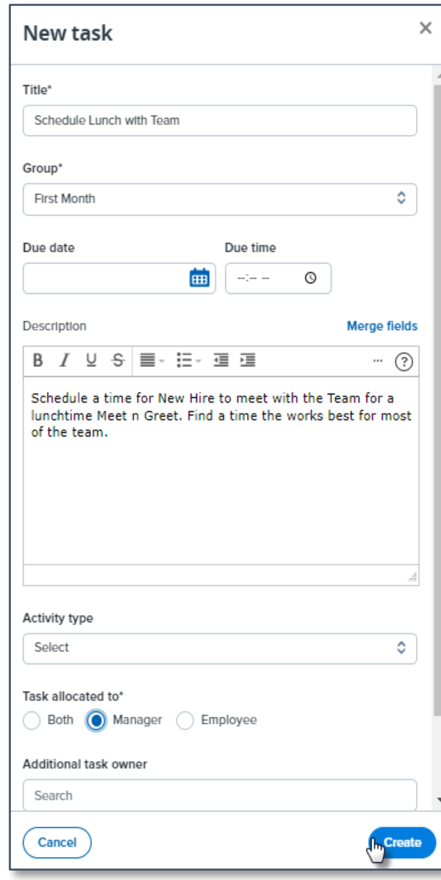


Add New Tasks

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

In the "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** button to save the task

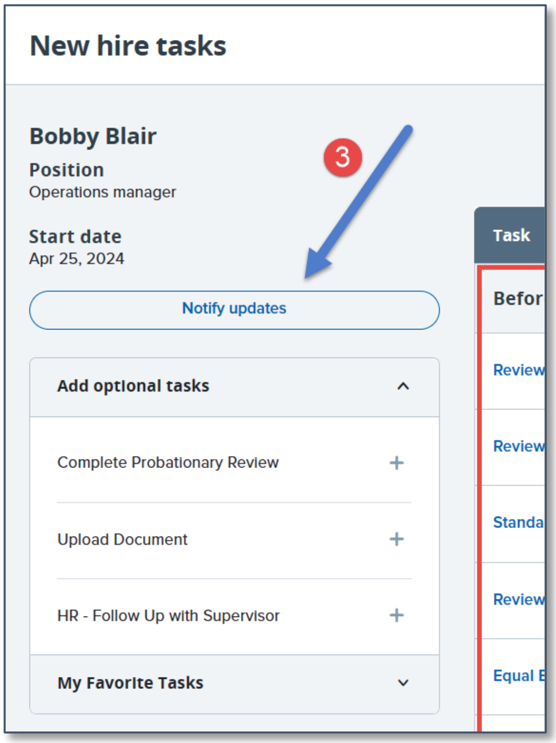


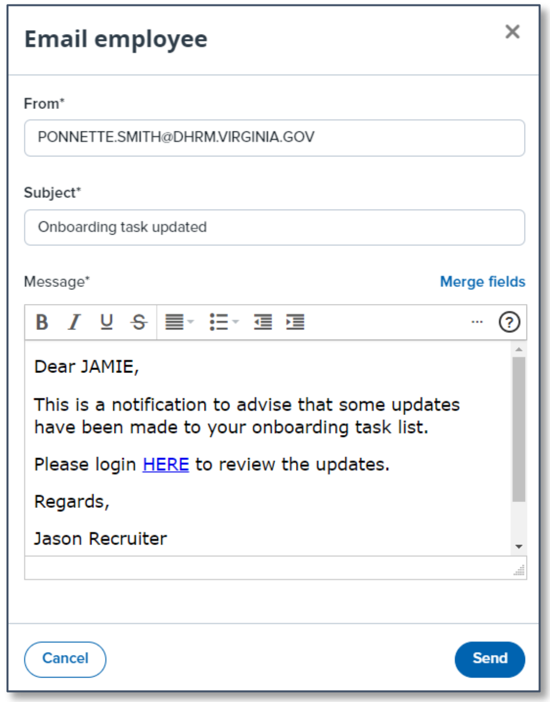
Notify Employee of updates

To inform new hire of added tasks or updates select the **Notify updates** button on the top left of the screen.

Once selected the user will see a pop-up window with a simple email template that has a link to their employee portal. Update the email as needed and click the **Send** button to complete.

NOTE: This will only send notifications to new hires.

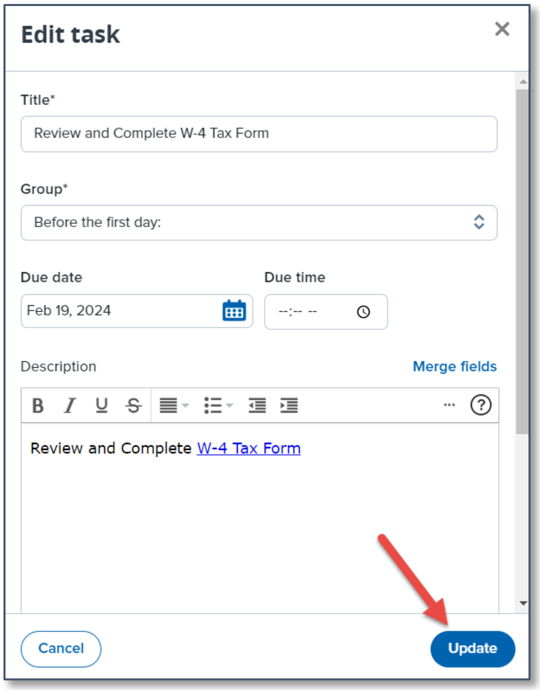




Edit Task

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

Update task fields in the task editing window. Select the **Update** button once completed.

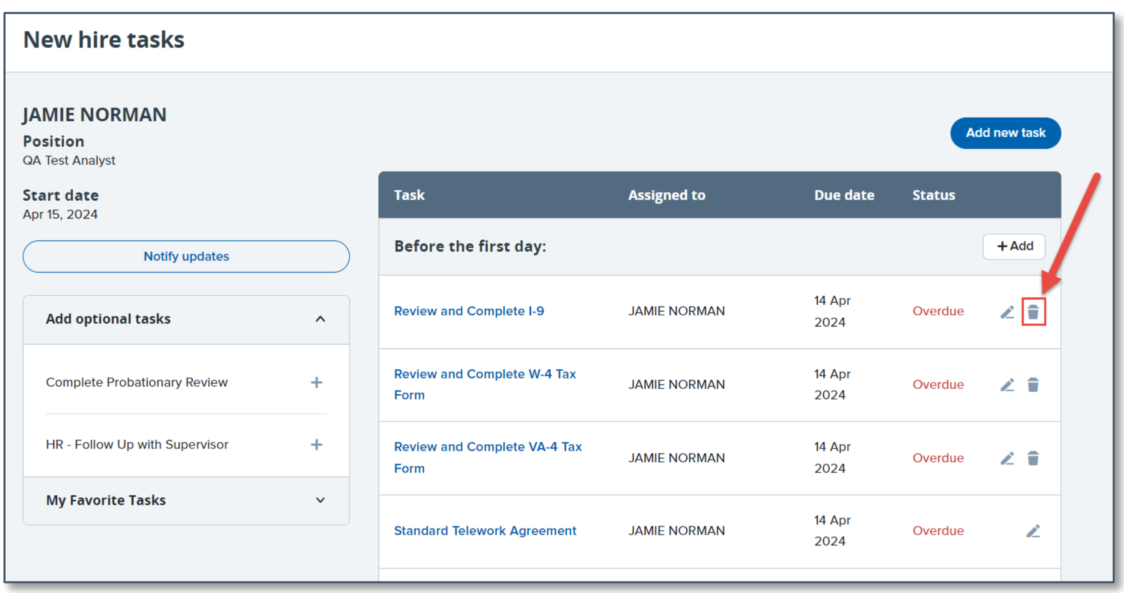


Delete Task

This function is only available to users with the role of Onboarding Specialist.

Delete a task by selecting the trashcan icon on the task item, if applicable.

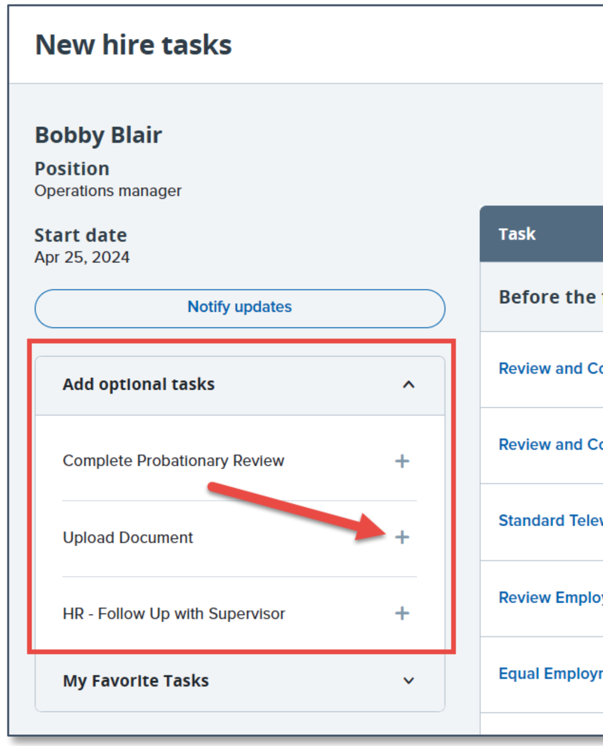
If the trashcan icon is not available, edit the task and move it to the "**Not applicable**" group. This will remove it from main task groups.



Add Optional Task(s)

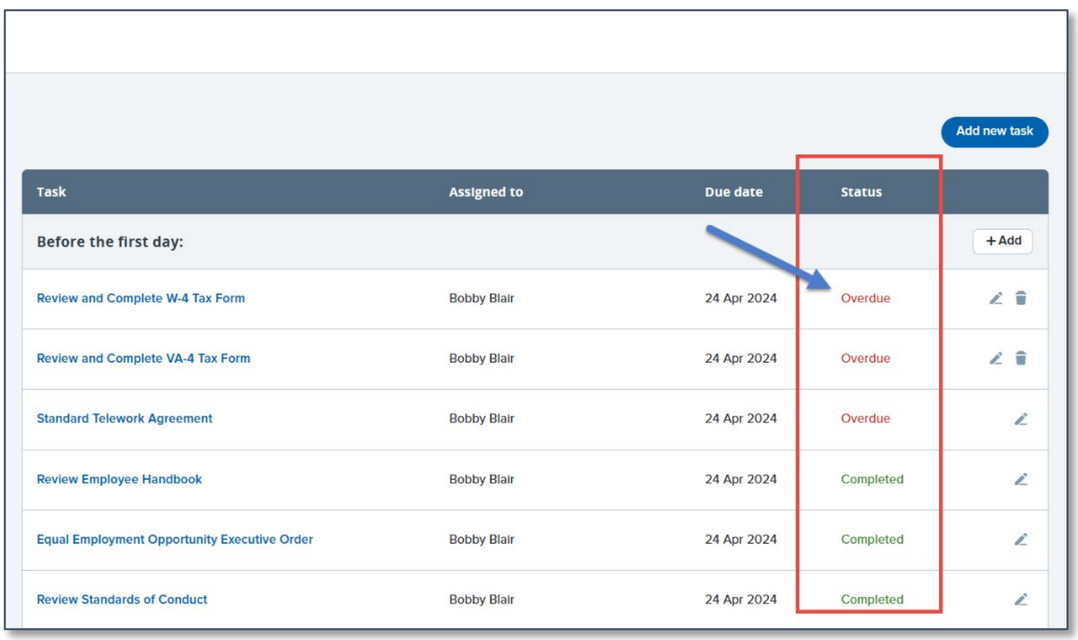
Optional tasks in the left task box can be added by selecting the plus (+) sign next to the appropriate task. Like the "Add new task" action, an editing pop-up window appears where the details of the task can be defined before saving to the task list.

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 upload any document of choice to whomever it is assigned to.



Task Statuses

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. Emails are not sent as tasks are completed. The task management screens are where statuses can be reviewed.



NOTE: Always verify the completion of all tasks for accuracy.

 Published: 05.08.2024 | **Last Updated:** 09.08.2026