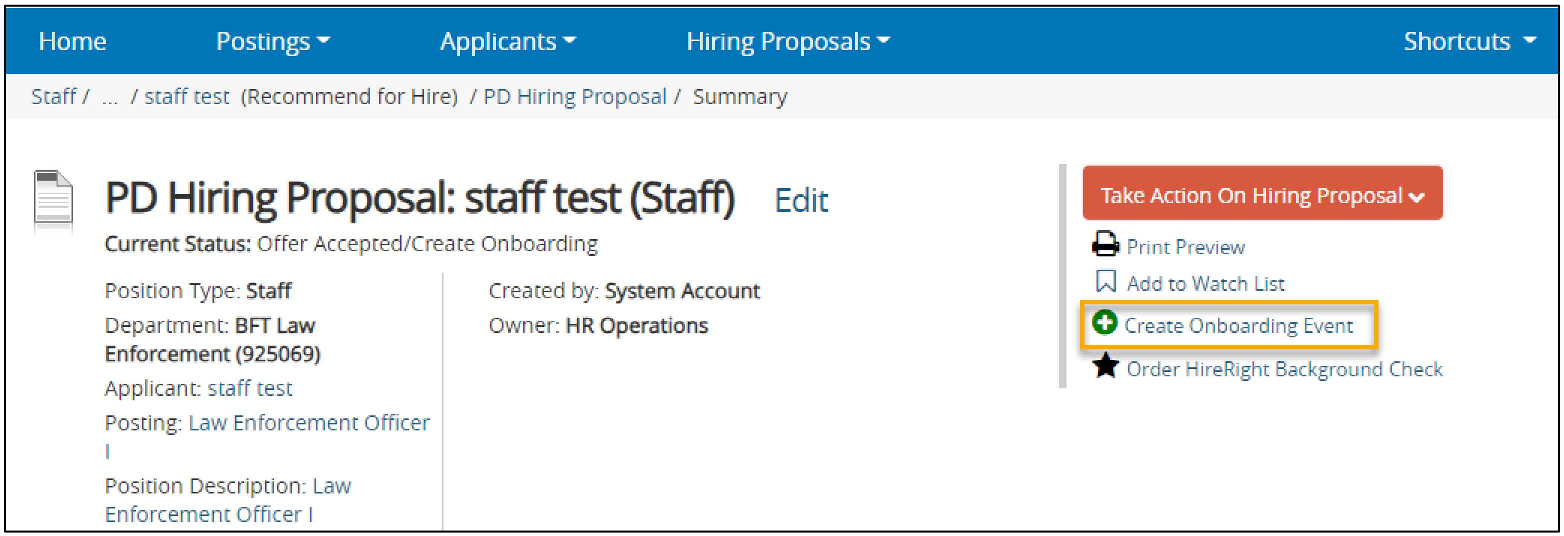
How to Assign Onboarding in PeopleAdmin:

This job aid outlines the process for HR Contacts to assign onboarding tasks in PeopleAdmin for Staff and Faculty. _International Staff and International Faculty checklists are assigned system-wide by the Office of International Services_. This job aid also outlines the process to view the status of onboarding tasks in PeopleAdmin Records.

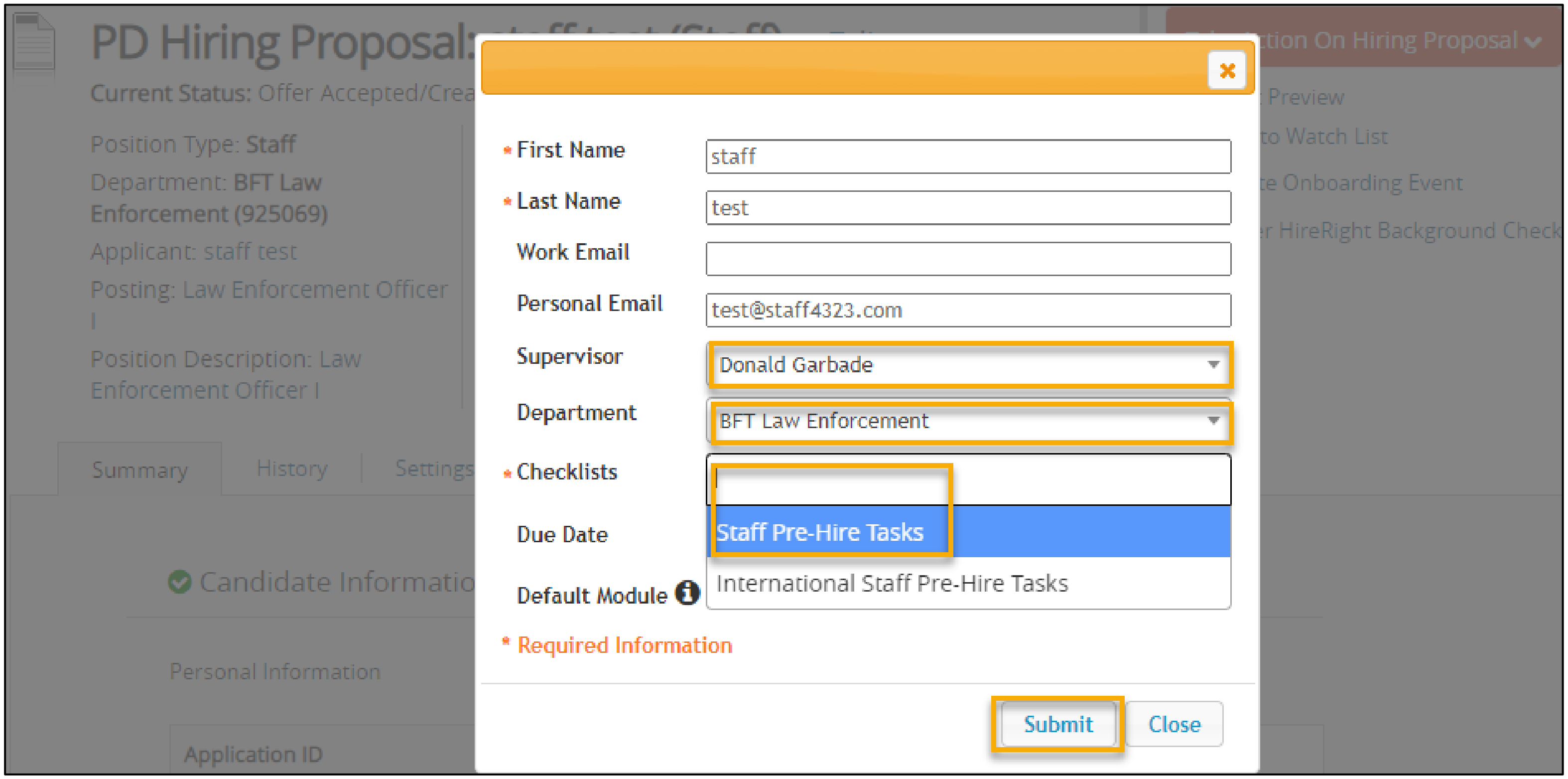
Processing Steps	Screenshots
Step 1a: Staff Onboarding. Once your new hire, or rehire greater than 1 year, is at the workflow status of 'Offer Accepted/Create Onboarding' click the **Create Onboarding Event** link. ***DO NOT*** assign onboarding events for the following types of hires: rehires less than 1 year, promotion, demotion, transfer, or reassignment.	

Step 1b: Assign the Onboarding tasks - Staff. Confirm the new employee's name and personal email are accurate. Select the **Supervisor** and **Department** from the drop-down menus.

Click in the **Checklists** field and select one checklist based on the type of employee. In this scenario the new employee is filling a staff position and the individual is a US Citizen, so we assign the **Staff Pre-Hire Tasks**. NEVER assign International Staff Pre-Hire Tasks.

Click the **Submit** button.

Once submitted, you will receive the light blue banner at the top of your screen alerting that the Tasks have been assigned.



Step 2a: Faculty Onboarding.

Once your new hire, or rehire greater than 1 year, is at the workflow status of ‘Offer Accepted/Create Onboarding’ click the **Create Onboarding Event** link.

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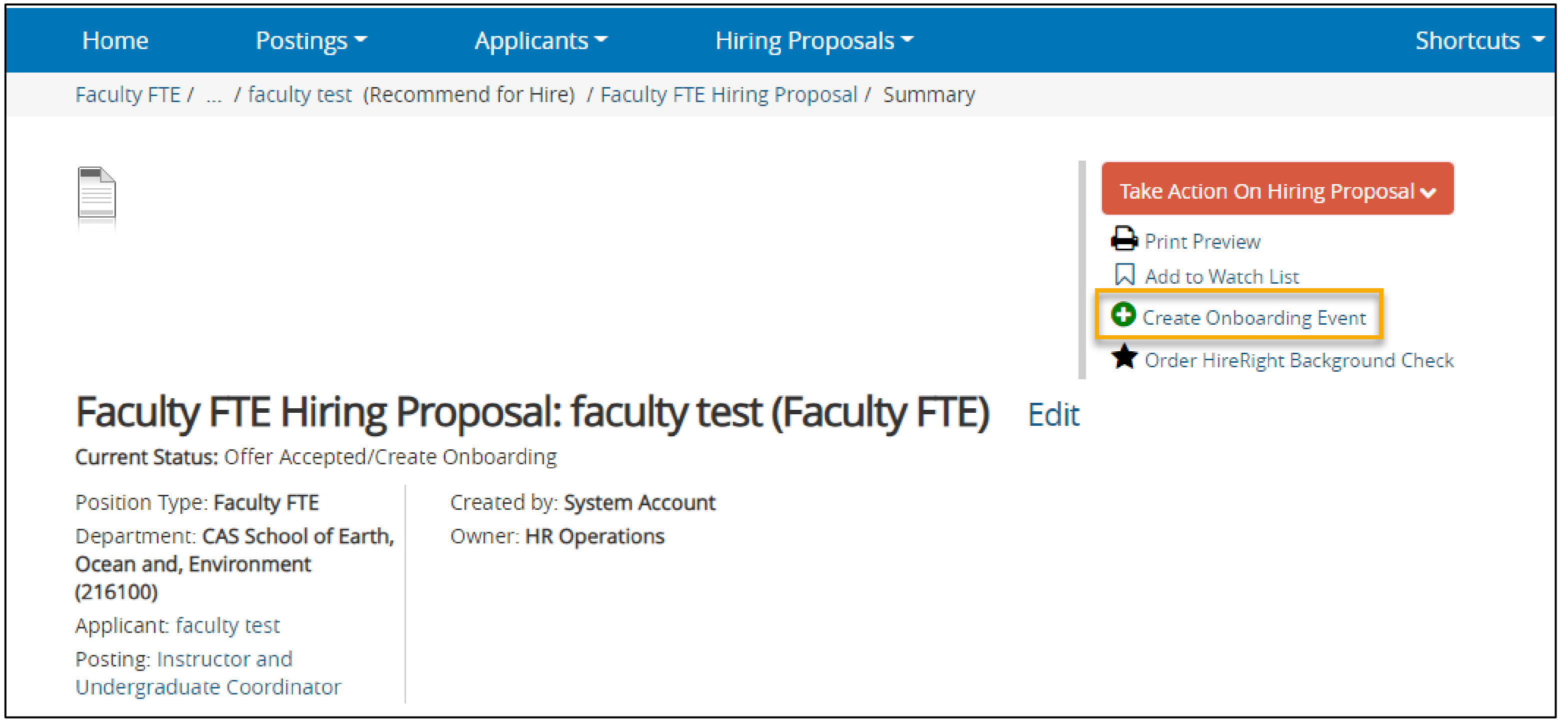


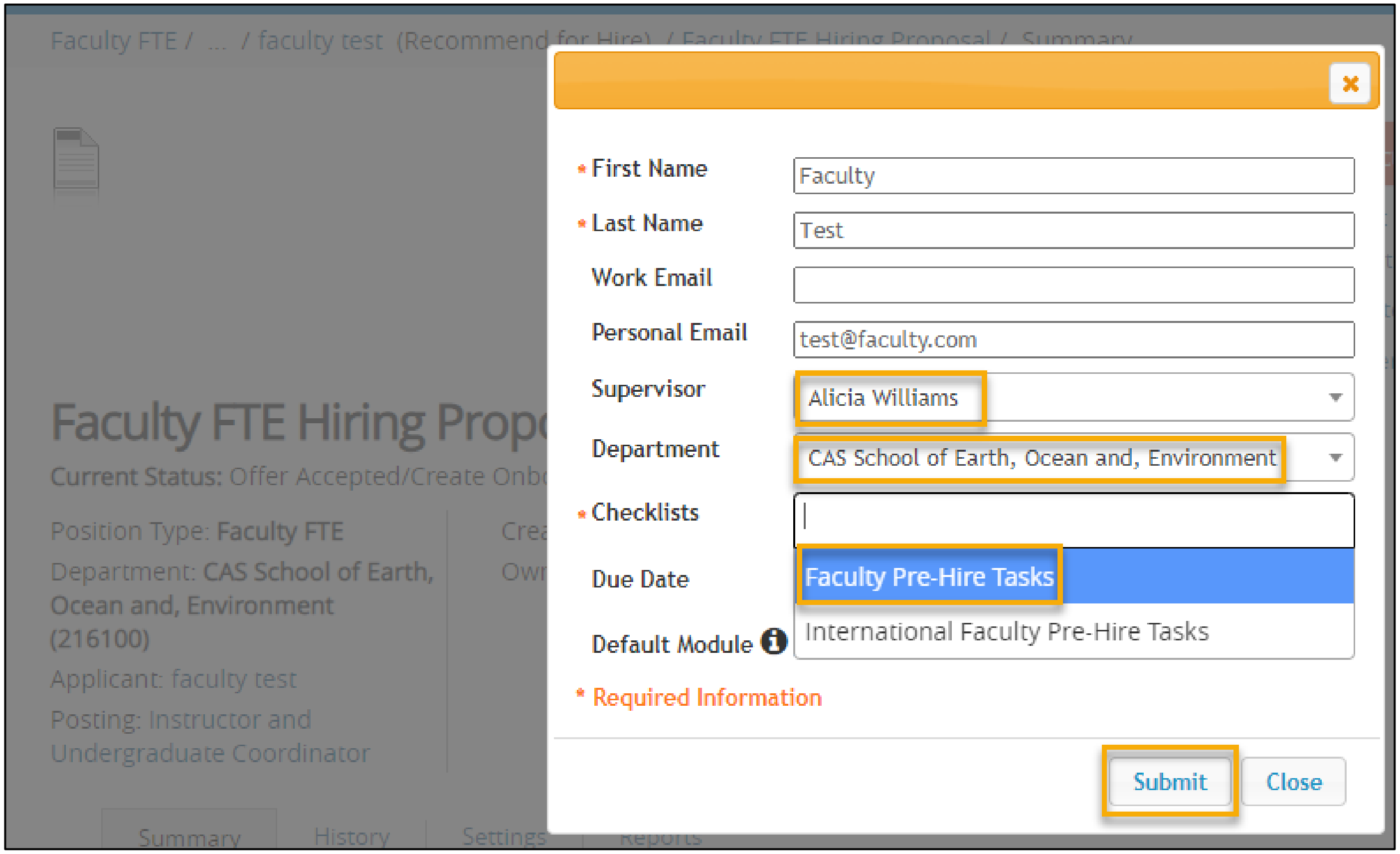
Step 2b: Assign the Onboarding tasks - Faculty.

Confirm the new employee’s name and personal email are accurate. Select the **Supervisor** and **Department** from the drop-down menus.

Click in the **Checklists** field and select one checklist based on the type of employee. In this scenario the new employee is filling a faculty position and the individual is a US Citizen, so we assign the **Faculty Pre-Hire Tasks**. NEVER assign International faculty Pre-Hire Tasks.

Click the **Submit** button.

Once submitted, you will see a light blue banner at the top of your screen alerting that the Tasks have been assigned successfully.



Step 3a: Viewing Onboarding Task Status in PeopleAdmin Records.

To view the status of onboarding for your new employees, start by clicking the three dots in the top left corner. Then select the **Employee Records** option in the menu.

Note this will open a new window in your browser.

In PeopleAdmin Records the default view is for you as an employee. To get to your new employee's onboarding tasks click the ***magnifying glass icon***.

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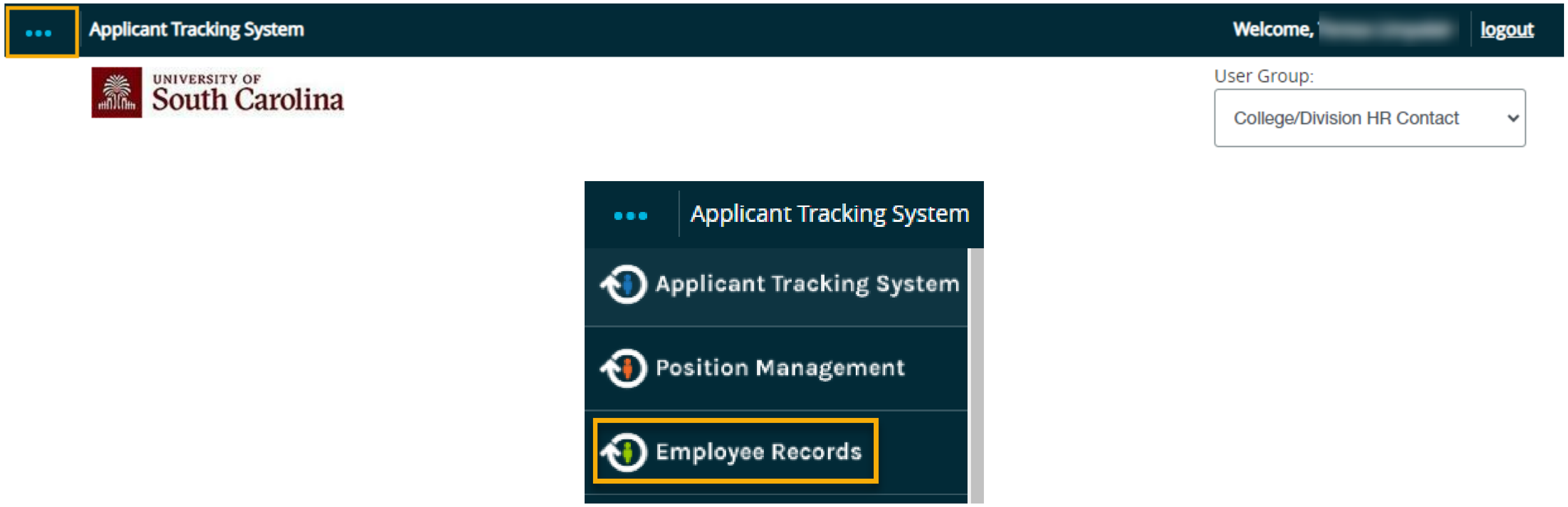

Step 3b: Viewing Onboarding Task Status in PeopleAdmin Records *continued***.**

Type the employee's name in the **User List** search box that appears and then click the appropriate individual from the list.

In this scenario we are clicking ***Staff Test***, a new hire at USC Beaufort.

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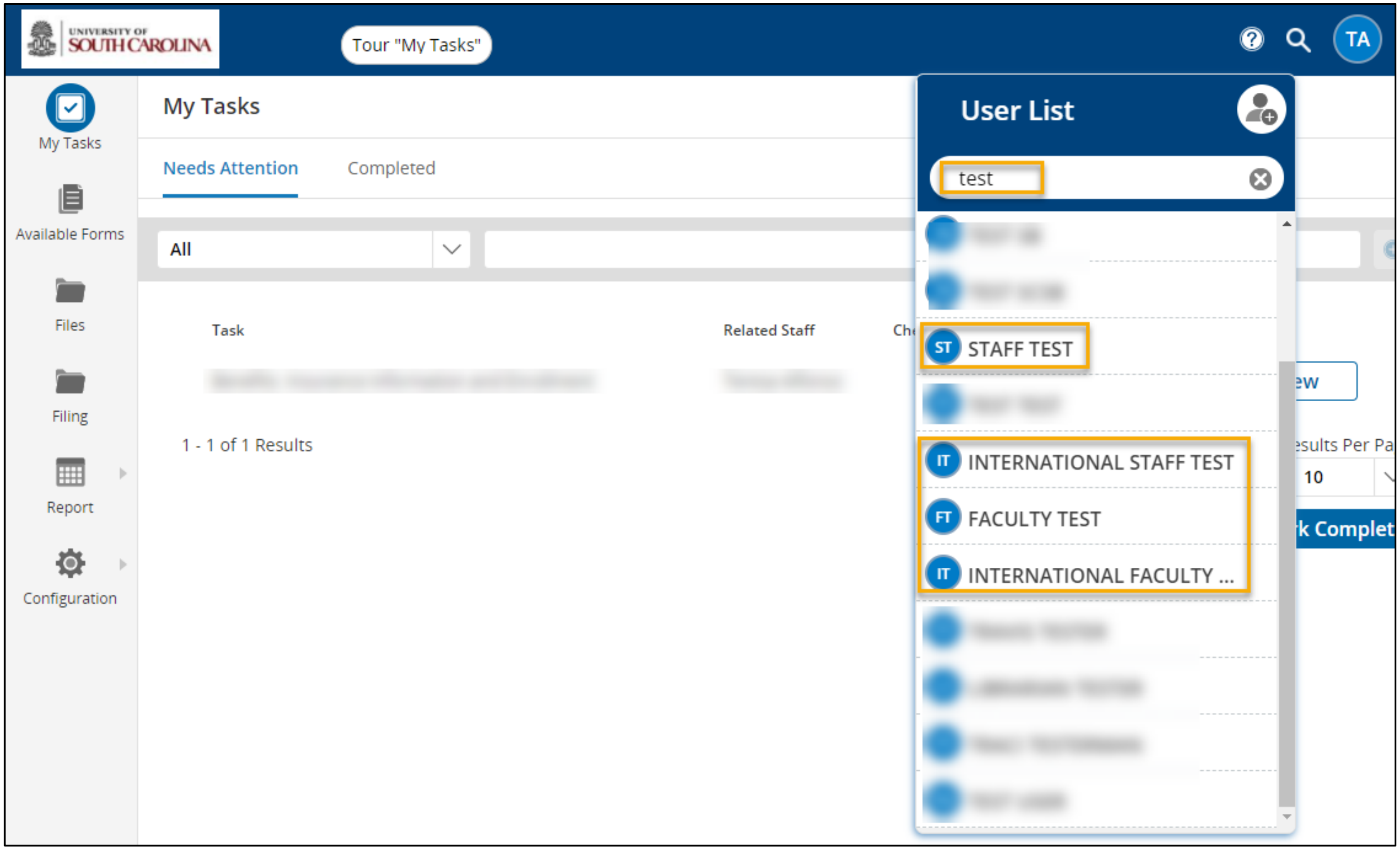

Step 3c: Viewing Onboarding Task Status in PeopleAdmin Records *continued*.

Only one Checklist will appear, as you assigned in the previous steps of this job aid or was assigned by OIS. The options are:

- Staff Pre-Hire Tasks
- International Staff Pre-Hire Task
- Faculty Pre-Hire Tasks
- International Faculty Pre-Hire Task

Click on the **Staff Pre-Hire Tasks** to view the status.

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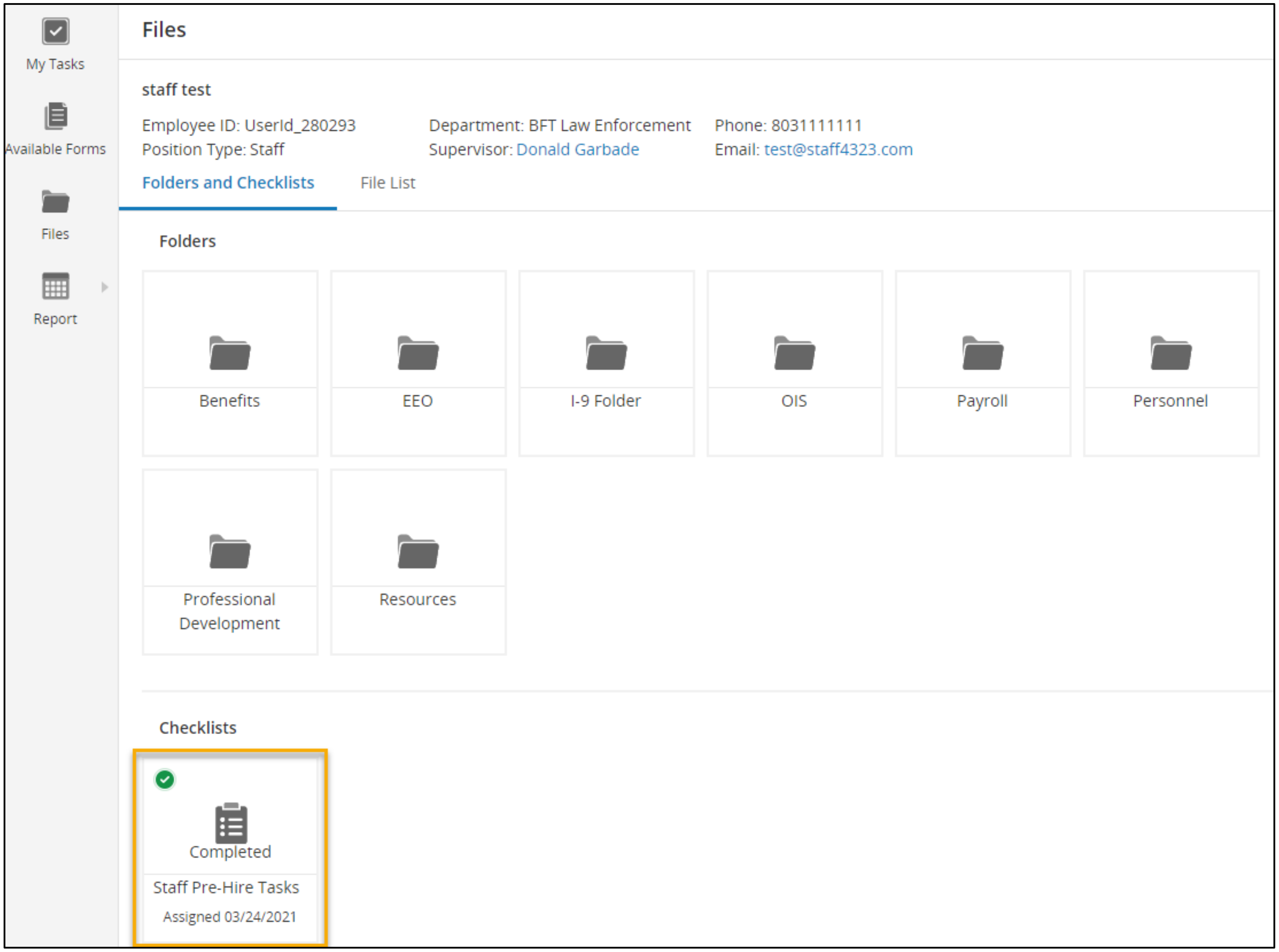
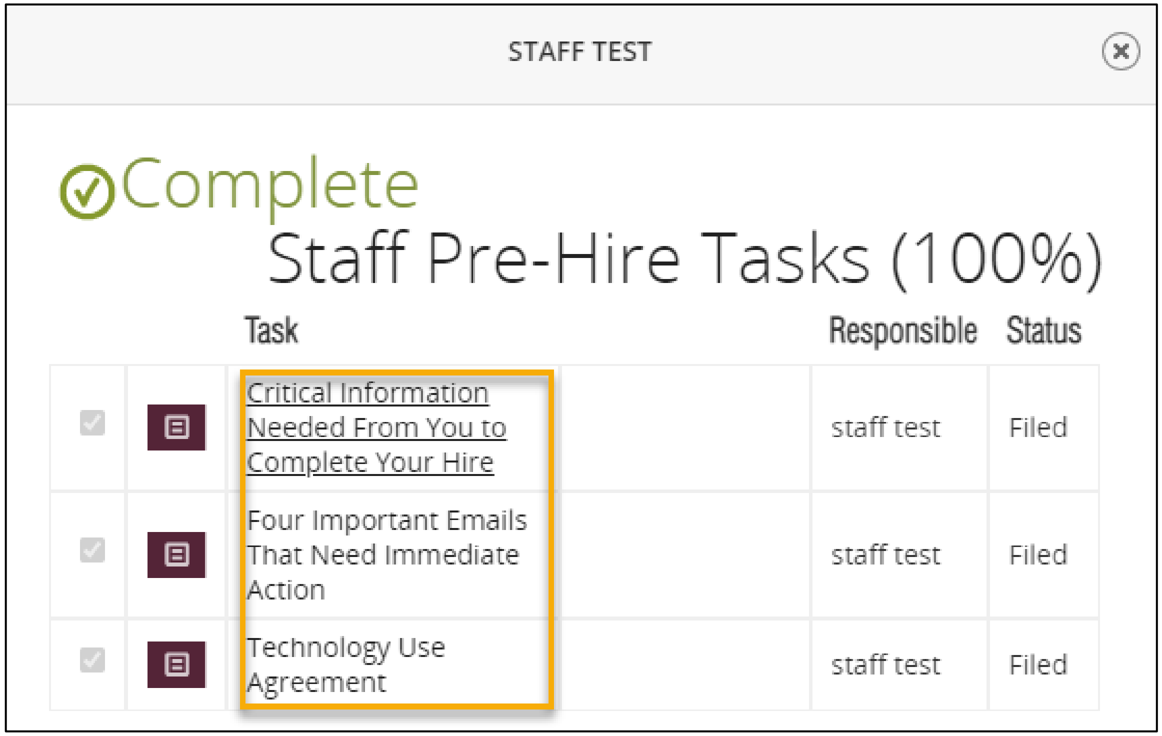


Step 3d: Viewing Onboarding Task Status in PeopleAdmin Records *continued*.

Quickly reference the status of each task within this checklist by reviewing the **Status** column. The **Responsible** individual is the new employee.

Note you can click any of the tasks to view the information.



Step 4a: View the Contact Log

Click on the **Contact Log** header to view all automated system communications that have been sent to the employee.

The Contact Log will display 10 results per page (if applicable). If the individual takes action upon receipt of initial email, no additional communications occur. However, if the individual does not take action timely the system will send automatic reminders.

Click the **View** button next to the communication you wish to view.

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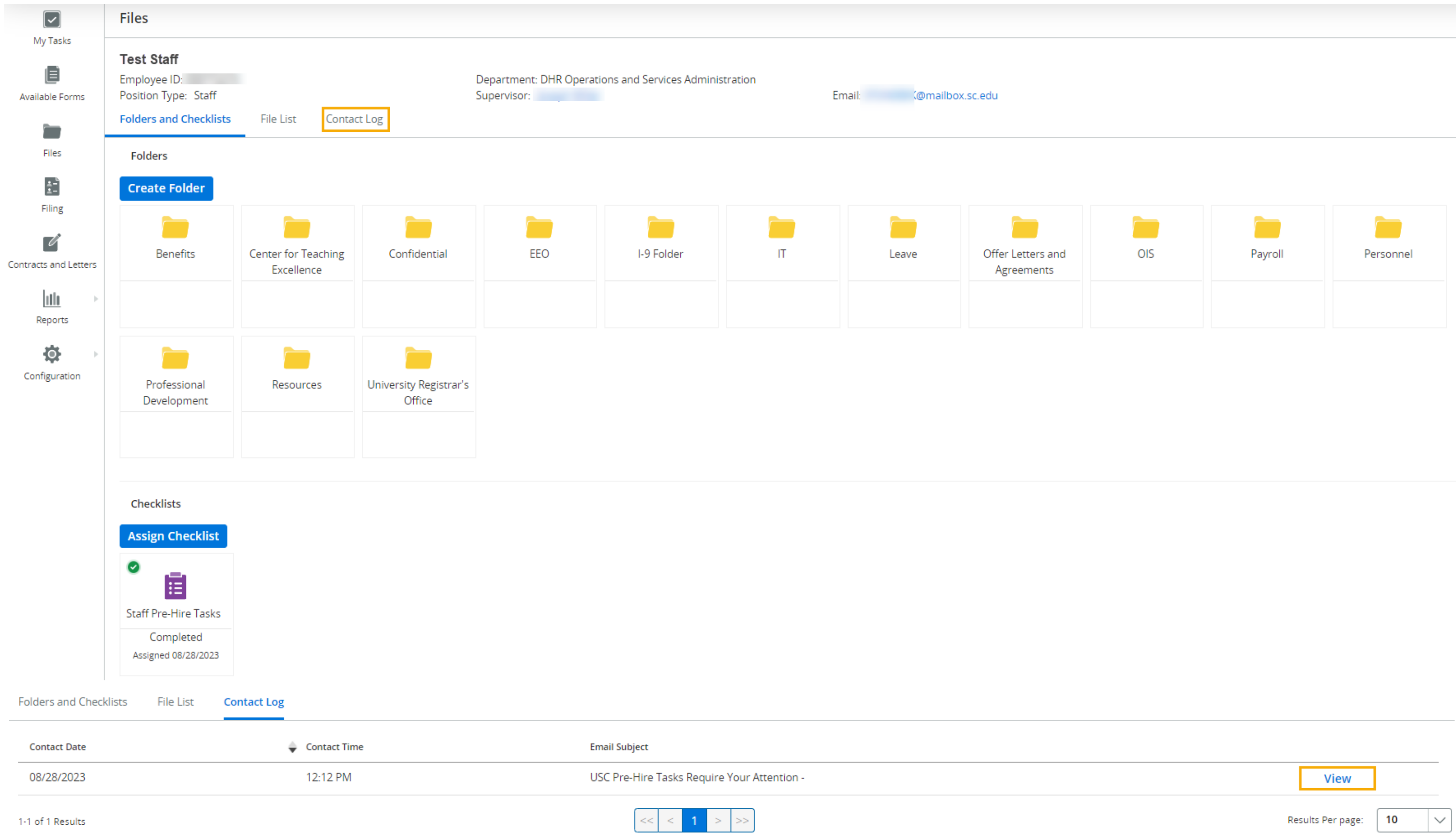

Step 4b: View the Contact Log

The Contact Log View presents the entire email that was sent to the employee, including all clickable links. Scroll to see the entire communication.

Click the **Close** button when you've finished your review.

Reminder, PeopleAdmin Pre-Hire Tasks are step one in the Onboarding Process. Once the new employee is active in HCM they must complete a separate set of tasks. Please refer to the job aid entitled: ***HR Contact View New Employee Onboarding Summary in HCM.***