

Onboarding Delegate – Onboarding Guide

Note: Be sure to 'Allow pop-ups' for the Talent Acquisition System (TAS)

How to Access

From the Hamburger Menu, click **My new hire tasks** OR **My new hires** (under *Applicant* section). New hires or new hire tasks can also be viewed from the **Manager Activities** section by clicking **New hire tasks** or **New hires**.

The screenshot shows the TAS dashboard with a sidebar menu on the left. The sidebar includes sections for 'Jobs', 'Applicants', and 'More...'. Under 'Applicants', 'My new hires' and 'My new hire tasks' are circled in red. The main dashboard area displays a top navigation bar with 'Jobs', 'People', 'Reports', 'Settings', and 'Recent Items'. Below this, there are four circular metrics: Total (7), All Notifications (2), Approved (3), and Offer (4). A list of requisitions is shown, including 'Account Manager II', 'Engineer Associate EDGE', 'Instructional Design Specialist', 'Admin and Office Spec II', and 'Director of Arts/Communications'. On the right, there are panels for 'Primary teams & users', 'Manager Activities' (with 'New hires' and 'New hire tasks' highlighted), and 'Tasks'.

My New Hires Page Navigation

The screenshot shows the 'My new hires' page with a search and filter bar at the top. Below is a table with the following columns: Applicant first name, Applicant last name, Requisition Number, Title, Application status, Business unit, Department, and Date started. The table contains 15 rows of data. The 'View Hiring Proposal' link for the second row (Tyler Miller) is highlighted in yellow. The page footer indicates 'Page 1 of 1' and 'Records 1 to 13 of 13'.

Applicant first name	Applicant last name	Requisition Number	Title	Application status	Business unit	Department	Date started
William	Turner	492227	Recruitment Administrator	Recommend for hire (Offer Card Launches)			Mar 27, 2023
Tyler	Miller	492217	Research Assistant - College of Medicine	Not Interviewed, Not Selected (Send Email)			Aug 22, 2017
Stephen	Ahn	492284	HR Rep,Unit Coord	Posting Cancelled			Apr 3, 2023
Regina	Galvan	492266	Professor	Send Offer Letter (Online Offer Made)			Aug 1, 2023
Nathaniel	Rodriguez	492291	HR Rep,Unit Coord	Recommend for hire (Offer Card Launches)			Apr 16, 2023
Missy	Hartman	492292	Program Specialist,Sr	Recommend for hire (Offer Card Launches)			May 1, 2023
Luke	Skywalker	492227	Recruitment Administrator	Under Review by Search Committee (New)			Feb 20, 2023
Han	Solo	492227	Recruitment Administrator	Offer Accepted, Form Complete			Mar 20, 2023
Elizabeth	Swan	492227	Recruitment Administrator	Under Review by Search Committee (New)			Mar 13, 2023
Darth	Vader	492227	Recruitment Administrator	Offer Accepted, Form Complete			Mar 20, 2023
Danny	Davis	492218	Recruitment Administrator	Offer accepted paperwork complete			Feb 13, 2023
Daniel	Lawrence	492227	Recruitment Administrator	Recommend for hire (Offer Card Launches)			Apr 3, 2023
Brook	Staples	492217	Research Assistant - College of Medicine	Offer Accepted, Form Complete			Mar 26, 2018

1. **Search Filters:** Ability to search for new hires based on specific criteria.
2. **New Hire Information:** Relevant details related to the new hire.
3. **View Offer Details:** Access to the Offer Card.
4. **View All Tasks:** Ability to view all tasks assigned to the new hire and the reports to manager.

My New Hire Tasks Page Navigation (access this by clicking from hamburger menu “My New Hire Tasks”)

PageUp BETA

People Recent Items Darlene

Bulk Complete 1

My new hire tasks

Employee: 2 Task: 3

Clear Search 4

select	Title 5	Employee	BadgeID	Step due	Hiring manager	Job	Start date	
<input type="checkbox"/>	Security	Adam Cole		Nov 22, 2021	Darlene Director	Stenographer	Nov 29, 2021	View all tasks
<input type="checkbox"/>	Pre-Day 1 Tasks	Adam Cole		Nov 26, 2021	Darlene Director	Stenographer	Nov 29, 2021	View all tasks
<input type="checkbox"/>	Day 1 Tasks	Adam Cole		Nov 29, 2021, 8:00am	Darlene Director	Stenographer	Nov 29, 2021	View all tasks
<input type="checkbox"/>	Training, Policy & Procedures, Intranet Resources	Adam Cole		Dec 3, 2021, 8:00am	Darlene Director	Stenographer	Nov 29, 2021	View all tasks
<input type="checkbox"/>	Day 1 Confirmation	Adam Cole		Nov 29, 2021, 10:00am	Darlene Director	Stenographer	Nov 29, 2021	View all tasks
<input type="checkbox"/>	Organize coffee	Ally Clark		May 24, 2021	Darlene Director	Administrative Coordinator - Executive Office of the Trial Court	May 26, 2021	View all tasks
<input type="checkbox"/>	19 Form completion	Ally Clark		May 19, 2021	Darlene Director	Administrative Coordinator - Executive Office of the Trial Court	May 26, 2021	View all tasks
<input type="checkbox"/>	Work station set up	Ally Clark		May 19, 2021	Darlene Director	Administrative Coordinator - Executive Office of the Trial Court	May 26, 2021	View all tasks
<input type="checkbox"/>	Discuss Goals with Employee	Ally Clark		May 31, 2021	Darlene Director	Administrative Coordinator - Executive Office of the Trial Court	May 26, 2021	View all tasks
<input type="checkbox"/>	Wed love to hear your feedback	Ally Clark		Jul 7, 2021	Darlene Director	Administrative Coordinator - Executive Office of the Trial Court	May 26, 2021	View all tasks
<input type="checkbox"/>	Employee Performance review	Ally Clark		Sep 23, 2021	Darlene Director	Administrative Coordinator - Executive Office of the Trial Court	May 26, 2021	View all tasks

Page 1 of 1

Records 1 to 11 of 11

1. **Bulk Complete:** Ability to check assigned tasks and mark as completed.
2. **Employee Filter:** Ability to filter tasks by the employee.
3. **Task Filter:** Ability to filter tasks by the task.
4. **Filter Search/Clear:** Initiate or clear any filters. Note – Any filters previously in place will carry over when next visiting this page.
5. **Task Details:** Currently open (uncompleted) tasks that are assigned to the logged in user.
 - a. **Title:** Title of the assigned task
 - b. **Employee:** Name of new hire
 - c. **Badge ID:** N/A
 - d. **Step Due:** Onboarding task completion due date
 - e. **Hiring Manager:** New hire reports to manager
 - f. **Job:** New hire job title
 - g. **Start date:** New hire start date
 - h. **View all tasks:** Redirect to view all tasks assigned to a new hire

New Hire Tasks Page – Individual navigation (accessed via View All Tasks)

PageUp BETA

People Recent Items Darlene

New hire tasks

Adam Cole 1
Position
Stenographer
Start date
Nov 29, 2021

Add optional tasks 2 ^
No tasks
My Favorite Tasks 3 v

Task 4	Assigned to	Due date	Status
Forms to Be Completed 2 Days Prior to Start Date			
W-4 (Federal Tax)	Adam Cole	27 Nov 2021	Overdue
M-4 (State Tax)	Adam Cole	27 Nov 2021	Overdue
Direct Deposit Form	Adam Cole	27 Nov 2021	Overdue
Emergency Contact Form	Adam Cole	27 Nov 2021	Overdue
I-9 Form	Adam Cole	04 Dec 2021	Overdue
New Member Enrollment Form - MSRB	Adam Cole	27 Nov 2021	Overdue
Social Security Form SSA-1945	Adam Cole	27 Nov 2021	Overdue
Trial Court Policy Acknowledgement Form	Adam Cole	27 Nov 2021	Overdue
New Hire/Personnel Intake Form	Adam Cole	27 Nov 2021	Overdue

1. **New Hire Details:** Name, position and start date
2. **Add Optional Tasks:** Assigned optional tasks to be completed
3. **My Favorite Tasks:** Tasks that marked as favorites. Note – Ability to assign favorite tasks is subject to permissions.
4. **Task List:** Open tasks categorized by group (when task should be completed)
 - a. **Task:** Title of task
 - b. **Assigned to:** User (employee/hiring manager/additional user) assigned to complete
 - c. **Due date:** Date task completion is due
 - d. **Status:** Status of the assigned task