Make Online Offer

**Note:** Offer approval is required before moving forward with making an online offer

**Step 1:** Select **Jobs have applicants for review** *(Update Applicant Status dashboard tile)*

**Step 2:** Click **View Applicants** *(far right)* for applicable Search #

**Step 3:** Select the **Overall Rating** outcome – change from **Ready for Dept to Make Offer to Make Online Offer**

**Step 4:** Click **Submit**

**Step 5:** Applicant will **Accept/Decline** offer online and initiator is notified *(Update onboarding tasks as needed and complete the hire in SmartHR)*

**Note:** Special Payroll data populates the new SmartHR templates and requires additional entry by the department. **New SP templates:** UC_PG_SPT, UC_PG_SPNT, UC_PG_SPNTS *(Regular Payroll automatically creates the SmartHR and no entry is required by the department)*

View/Print Accepted Offer

**Note:** Chosen candidate accepts the offer online and does not return a signed offer letter

**Step 1:** Select **View My Searches/View My Team Searches** *(View Searches dashboard tile)*

**Step 2:** Click **Review Applications** *(far right)* for the applicable search #

**Step 3:** Click chosen candidate’s name

**Step 4:** Click hyperlink text below **Offer** label *(actual text changes as the offer progresses through the workflow)*

**Step 5:** Scroll to **Offer Progress** section of hire request

**Step 6:** Applicable fields will be automatically updated by the system *(yes and date offer accepted)*

**Step 7:** Print offer request or screenshot offer progress section

Onboarding

Access to onboarding is entered when creating the hire request *(Steps 12 & 13)*. Names entered into the following fields on the hire request are granted access to onboarding: Immediate Supervisor, Search Initiator/Onboarding Access, Onboarding Coordinator, and Onboarding Delegate.

View/Update Tasks for New Hires

**Step 1:** Select **New Hires** *(Approve Offers and Manage Onboarding dashboard tile)*

**Step 2:** Click **View All Tasks** to the right of new hire row

**Step 3:** View tasks and whom they are assigned to, due date, and completion status

**Step 4:** Click the task name to view details and/or update status to completed

**Step 5:** Click the trash can icon as needed, to eliminate tasks as needed *(mandatory tasks cannot be removed and the icon does not display)*

Add New Task to Onboarding Task List

**Step 1:** Select **New Hires** *(Approve Offers and Manage Onboarding dashboard tile)*

**Step 2:** Click **View All Tasks** to the right of new hire row

**Step 3:** Click **Add new task** button located above top right of task list or click + Add at each group/timeline section

**Step 4:** Add new task details including Title, Group *(timeline section e.g. Prior to first day, first week, etc.), Due date, Due time, Description, Activity Type, Task Allocated to, and Add to Favorites

**Note:** Add to Favorites checkbox saves the task details to be reused and added to future new hires

**Step 5:** Click **Create** button

**Step 6:** View new task on the task list and on left under **My Favorite Tasks**

**Step 7:** *(Optional)* Click **Notify updates** to create an update notification to advise new employee of new tasks to complete, and click **Send**
Add Optional Tasks or My Favorite Tasks to Task List

*Step 1:* Select **New Hires** *(Approve Offers and Manage Onboarding dashboard tile)*
*Step 2:* Click **View All Tasks** to the right of new hire row
*Step 3:* Click the plus sign (+) for the applicable task
*Step 4:* Update Tasks details as needed
*Step 5:* Click **Create** button
*Step 6:* View new tasks on the task list

*Note:* To update the location on timeline (e.g. First Day, Following Orientation, etc.), edit task and update the **Group** field.

Filter Open Tasks by Employee/Task

*Step 1:* Select **Current Onboarding Tasks** *(Approve Offers and Manage Onboarding dashboard tile)*
*Step 2:* Select Employee name(s) or Task(s)
*Step 3:* Click **Search**
*Step 4:* Click **Clear** to remove current filter and view all open tasks for all employees
*Step 5:* Bulk Complete open tasks by checking the **Title** check box (on left) for applicable tasks/employees and click **Bulk Complete** *(top of page)*

*Note:* Tasks remove from **My Onboarding Tasks** list when completed and remain on **New Hires** onboarding task list

*Step 6:* Click **View all tasks** to view all tasks for the specific employee (return to New Hires task list)