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 SmartHR template and requires additional entry by the department (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 Jobs requiring interview Evaluations (Enter Evaluations dashboard tile)
Step 2: Click View Applicants (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)