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 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
   \( \textbf{Note:} \) To update the location on timeline (e.g. First Day, Following Orientation, etc.), edit task and update the \textbf{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 \textbf{Title} check box (on left) for applicable tasks/employees and click \textbf{Bulk Complete} (top of page)
   \( \textbf{Note:} \) 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)