

**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 Scholars.* This job aid also outlines the process to view the status of onboarding tasks in PeopleAdmin Records.

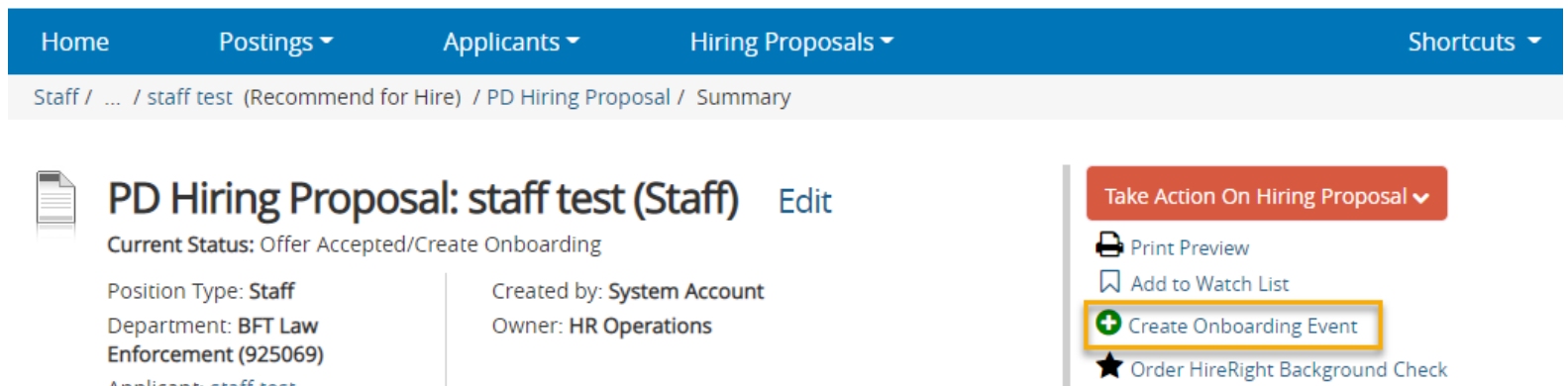
**Processing Steps**

**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.

**Screenshots**



The screenshot shows the PeopleAdmin interface for a 'PD Hiring Proposal: staff test (Staff)'. The breadcrumb trail is 'Staff / ... / staff test (Recommend for Hire) / PD Hiring Proposal / Summary'. The proposal details include: Position Type: Staff, Department: BFT Law Enforcement (925069), Applicant: staff test, Posting: Law Enforcement Officer I, and Position Description: Law Enforcement Officer I. The current status is 'Offer Accepted/Create Onboarding'. The 'Take Action On Hiring Proposal' dropdown menu is open, showing options: Print Preview, Add to Watch List, **Create Onboarding Event** (highlighted with a yellow box), and Order HireRight Background Check.

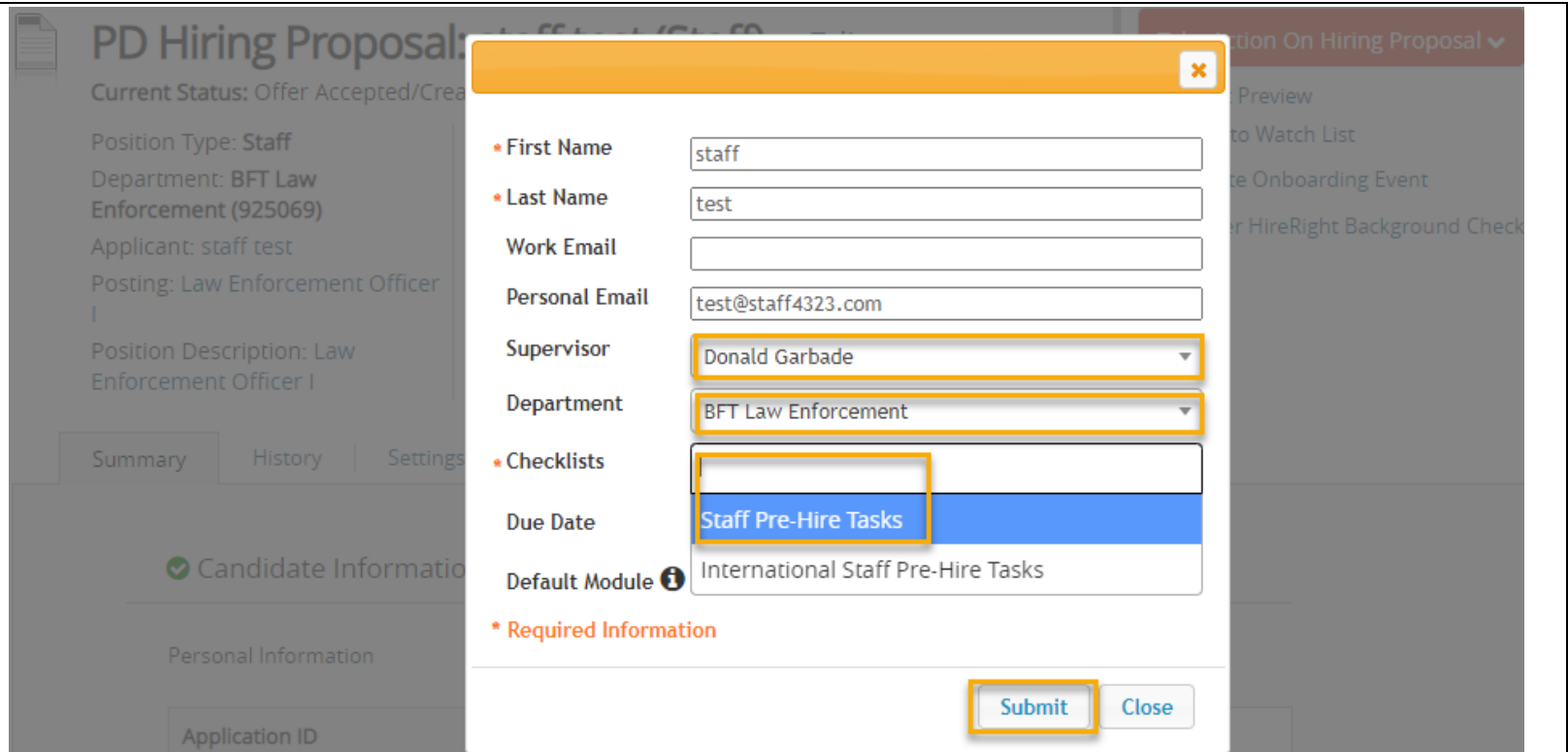
**Step 1b: Assign the Onboarding tasks - Staff.**

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**.

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.



The screenshot shows the 'PD Hiring Proposal' form in PeopleAdmin. The form includes fields for Position Type (Staff), Department (BFT Law Enforcement (925069)), Applicant (staff test), Posting (Law Enforcement Officer I), and Position Description (Law Enforcement Officer I). A modal window is open over the form, containing the following fields:

- First Name: staff
- Last Name: test
- Work Email: [empty]
- Personal Email: test@staff4323.com
- Supervisor: Donald Garbade
- Department: BFT Law Enforcement
- Checklists: Staff Pre-Hire Tasks (selected)
- Due Date: [empty]
- Default Module: International Staff Pre-Hire Tasks

Buttons for 'Submit' and 'Close' are visible at the bottom of the modal. A red asterisk indicates required information.

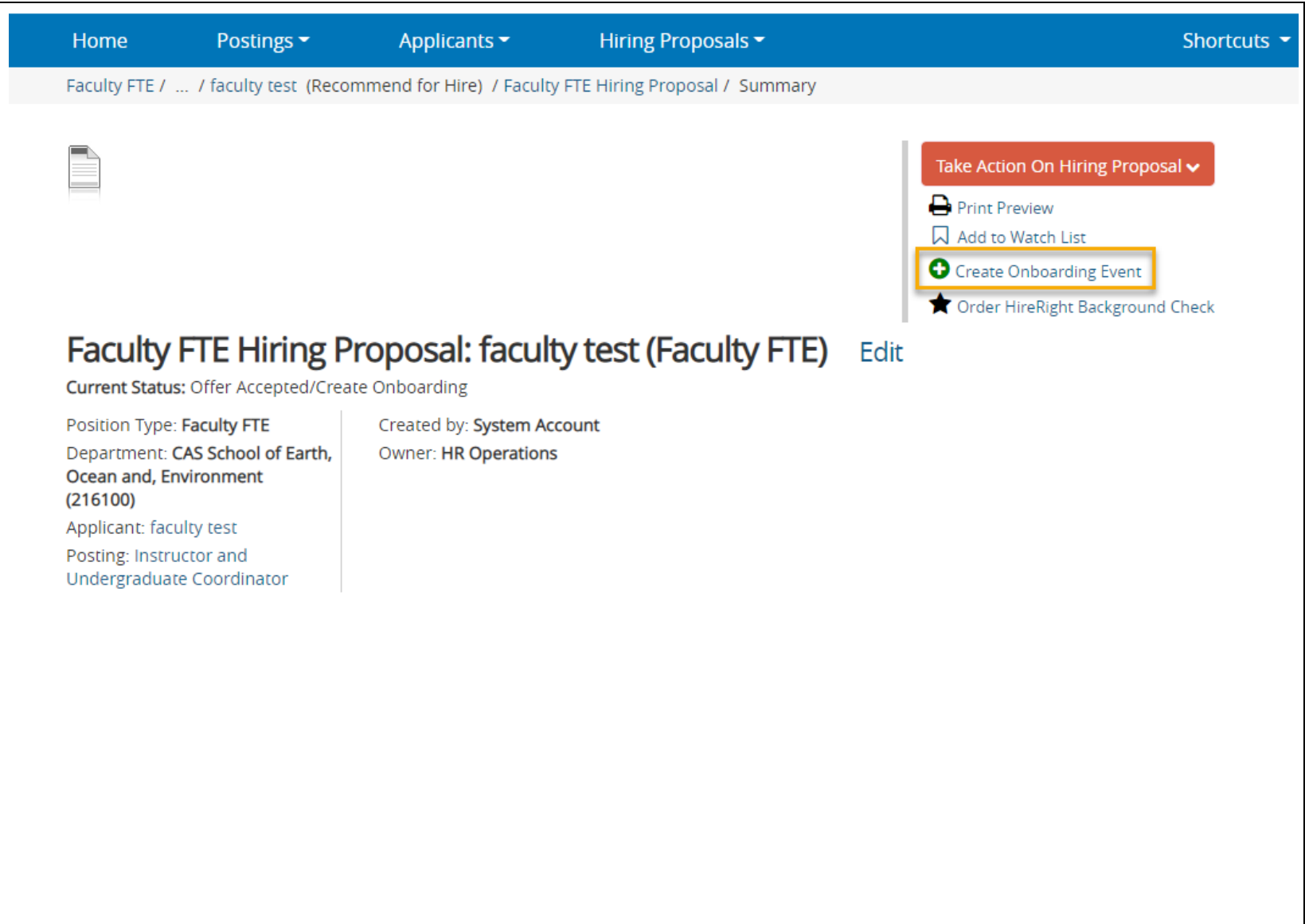


A light blue notification banner at the top of the screen displays the message: "Staff Pre-Hire Tasks selected for Onboarding Event." Below this is a dark blue footer bar containing the text "Applicant Tracking System" on the left and "Welcome, Teresa Limpalair" on the right.

**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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The screenshot shows the PeopleAdmin interface for a Faculty FTE Hiring Proposal. The breadcrumb trail is: Faculty FTE / ... / faculty test (Recommend for Hire) / Faculty FTE Hiring Proposal / Summary. The main heading is "Faculty FTE Hiring Proposal: faculty test (Faculty FTE)" with an "Edit" link. The current status is "Offer Accepted/Create Onboarding".

Position Type: Faculty FTE	Created by: System Account
Department: CAS School of Earth, Ocean and, Environment (216100)	Owner: HR Operations
Applicant: faculty test	
Posting: Instructor and Undergraduate Coordinator	

On the right side, there is a "Take Action On Hiring Proposal" dropdown menu with the following options: Print Preview, Add to Watch List, **Create Onboarding Event** (highlighted with a yellow box), and Order HireRight Background Check.

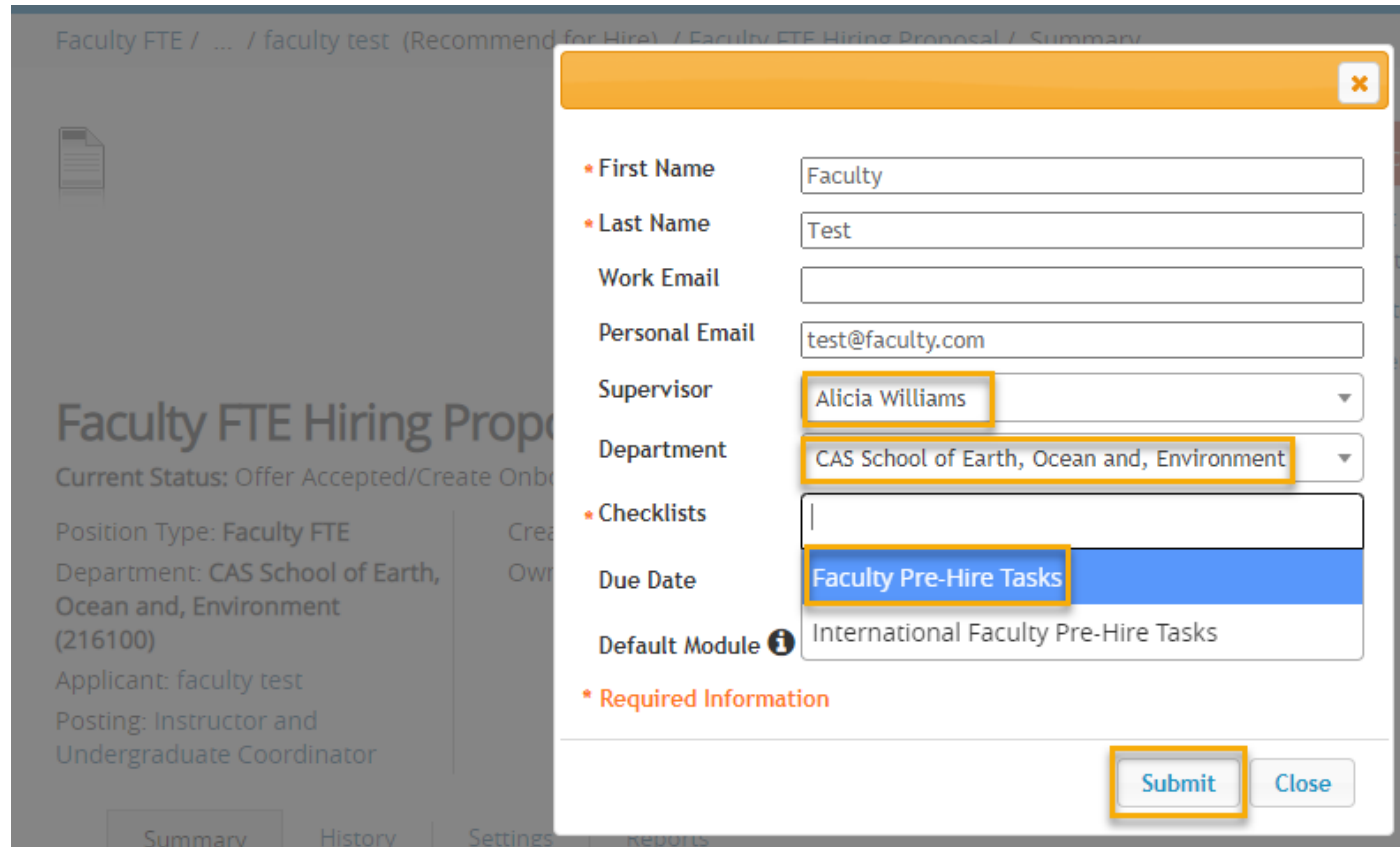
**Step 2b: Assign the Onboarding tasks - Faculty.**

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**.

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.



Faculty FTE / ... / faculty test (Recommend for Hire) / Faculty FTE Hiring Proposal / Summary

Faculty FTE Hiring Proposal

Current Status: Offer Accepted/Create Onb

Position Type: Faculty FTE

Department: CAS School of Earth, Ocean and, Environment (216100)

Applicant: faculty test

Posting: Instructor and Undergraduate Coordinator

Summary History Settings Reports

\* First Name Faculty

\* Last Name Test

Work Email

Personal Email test@faculty.com

Supervisor Alicia Williams

Department CAS School of Earth, Ocean and, Environment

\* Checklists

Due Date Faculty Pre-Hire Tasks

Default Module International Faculty Pre-Hire Tasks

\* Required Information

Submit Close

**i** Faculty Pre-Hire Tasks selected for Onboarding Event.

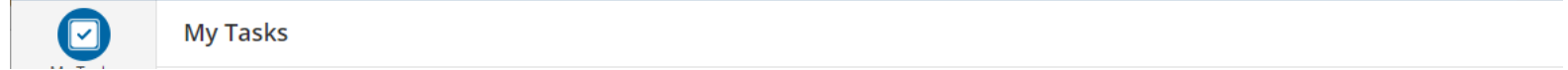
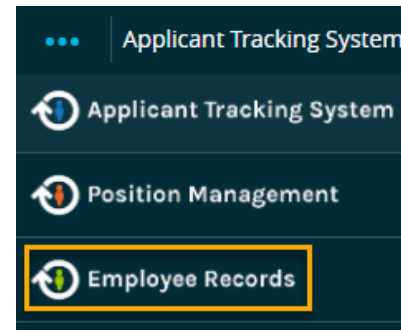
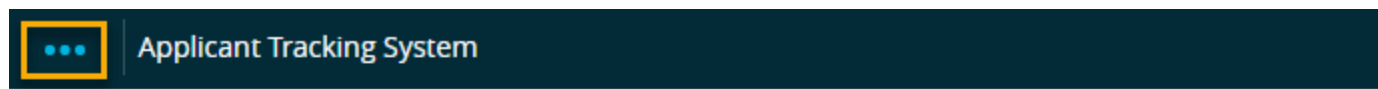
**Step 3a: Viewing Onboarding Task Status in PeopleAdmin Records.**

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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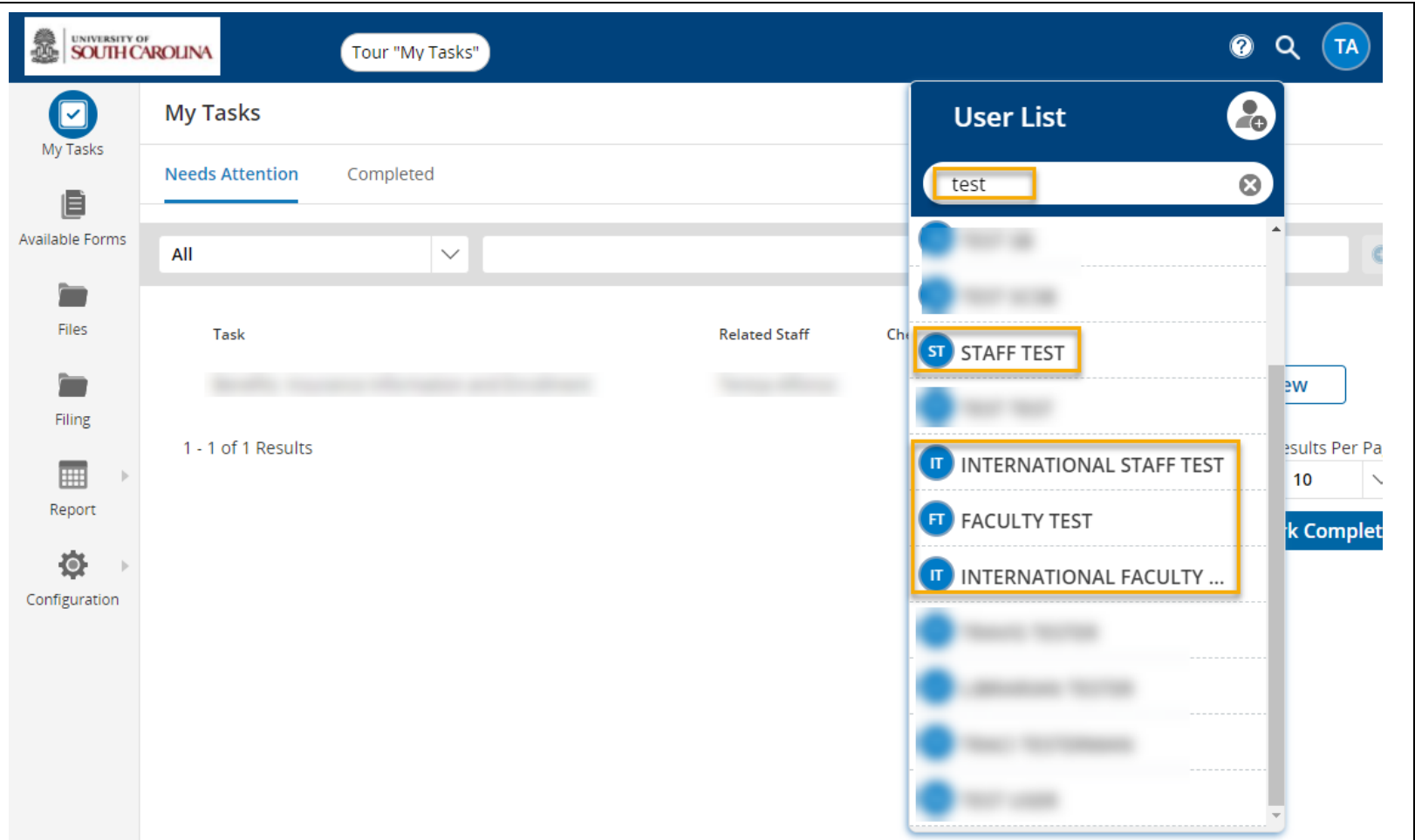


**Step 3b: Viewing Onboarding Task Status in PeopleAdmin Records**  
*continued.*

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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The screenshot displays the PeopleAdmin interface. At the top, there is a navigation bar with the University of South Carolina logo, a search icon, and a user profile icon labeled 'TA'. Below the navigation bar, the 'My Tasks' section is visible, with tabs for 'Needs Attention' and 'Completed'. A sidebar on the left contains navigation options: 'My Tasks', 'Available Forms', 'Files', 'Filing', 'Report', and 'Configuration'. The main content area shows a table with columns for 'Task', 'Related Staff', and 'Ch'. A 'User List' modal window is open on the right, featuring a search box with the text 'test'. The search results in the modal are: 'ST STAFF TEST', 'IT INTERNATIONAL STAFF TEST', 'FT FACULTY TEST', and 'IT INTERNATIONAL FACULTY ...'. The 'ST STAFF TEST' entry is highlighted with an orange box.

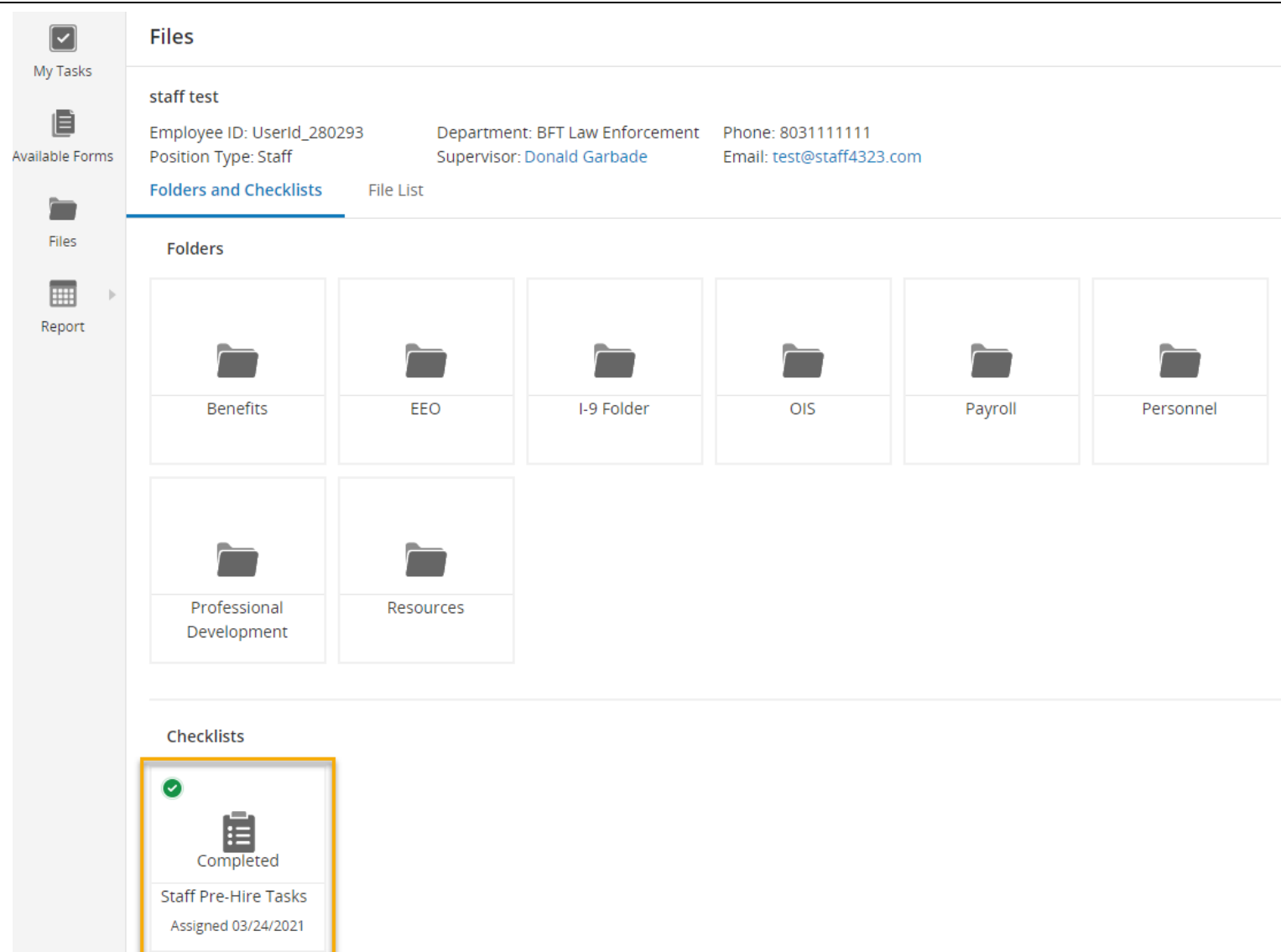
**Step 3c: Viewing Onboarding Task Status in PeopleAdmin Records**  
*continued.*

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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**Files**

staff test

Employee ID: UserId\_280293      Department: BFT Law Enforcement      Phone: 8031111111  
Position Type: Staff      Supervisor: Donald Garbade      Email: test@staff4323.com

**Folders and Checklists**      File List

**Folders**

- Benefits
- EEO
- I-9 Folder
- OIS
- Payroll
- Personnel
- Professional Development
- Resources

**Checklists**

- Completed  
Staff Pre-Hire Tasks  
Assigned 03/24/2021

**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.

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.**

STAFF TEST ✕

✔ Complete  
Staff Pre-Hire Tasks (100%)

	Task	Responsible	Status
<input checked="" type="checkbox"/>	 <a href="#">Critical Information Needed From You to Complete Your Hire</a>	staff test	Filed
<input checked="" type="checkbox"/>	 Four Important Emails That Need Immediate Action	staff test	Filed
<input checked="" type="checkbox"/>	 Technology Use Agreement	staff test	Filed