

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

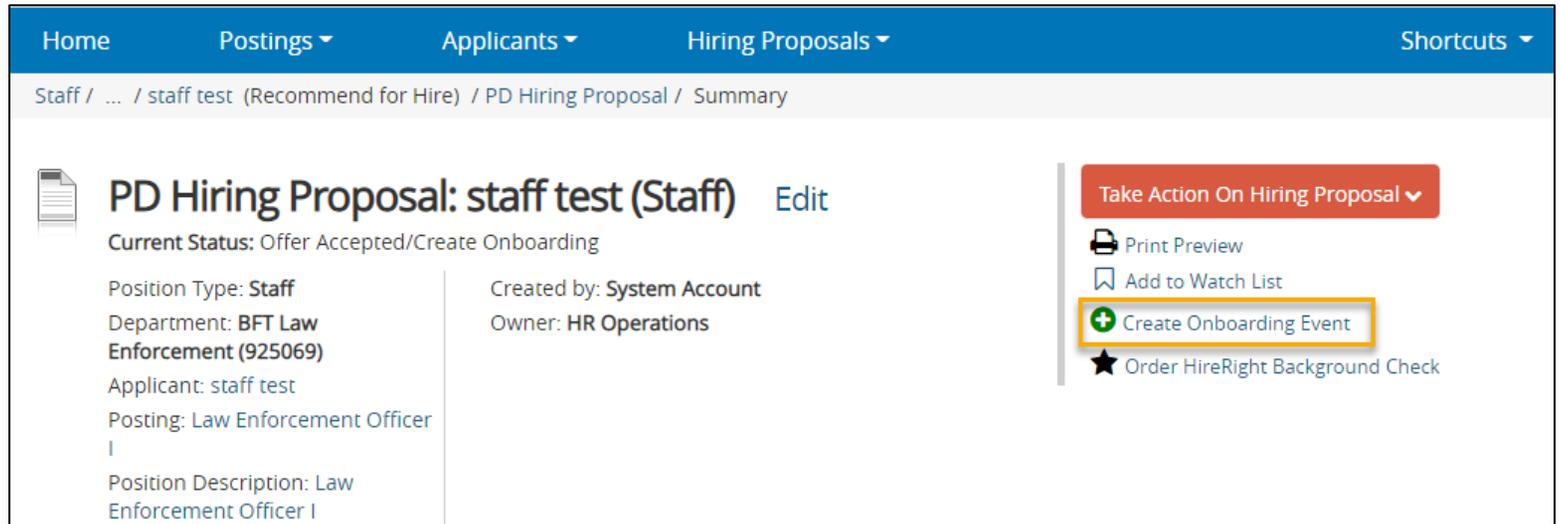
Processing Steps

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 hiring proposal. The navigation bar includes Home, Postings, Applicants, Hiring Proposals, and Shortcuts. The breadcrumb trail is Staff / ... / staff test (Recommend for Hire) / PD Hiring Proposal / Summary. The main content area displays 'PD Hiring Proposal: staff test (Staff)' with an 'Edit' link. The current status is 'Offer Accepted/Create Onboarding'. 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. On the right, a '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.

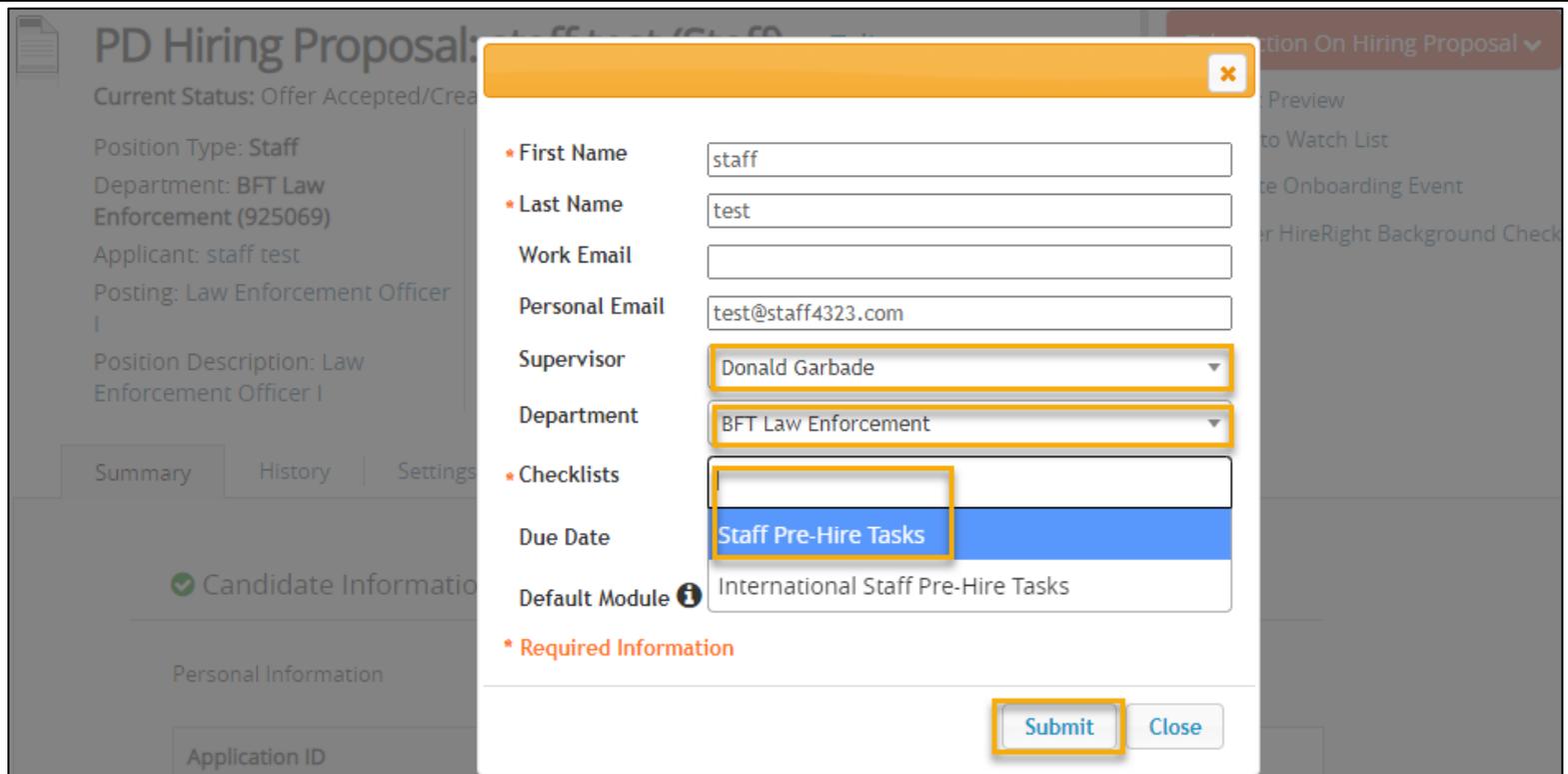
Step 1b: Assign the Onboarding tasks - Staff.

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**. **NEVER assign International Staff Pre-Hire Tasks.**

Click the **Submit** button.

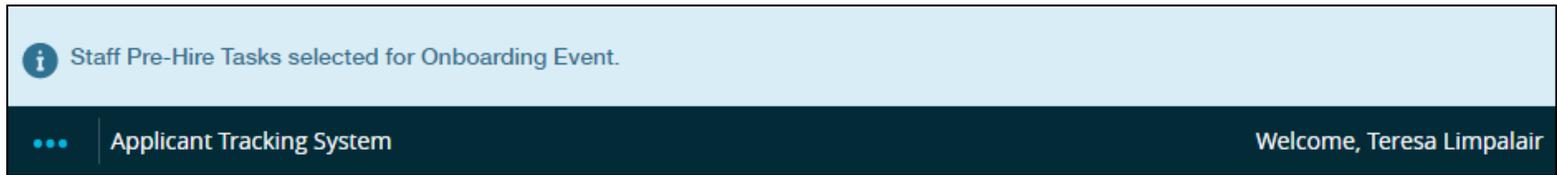
Once submitted, you will receive the light blue banner at the top of your screen alerting that the Tasks have been assigned.



The screenshot shows a 'PD Hiring Proposal' form in PeopleAdmin. The form includes fields for Position Type (Staff), Department (BFT Law Enforcement), Applicant (staff test), Posting (Law Enforcement Officer), and Position Description (Law Enforcement Officer). A modal window is open over the form, allowing the user to assign onboarding tasks. The modal contains the following fields:

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

At the bottom of the modal, there are 'Submit' and 'Close' buttons. A red asterisk indicates that the 'Checklists' field is required information.

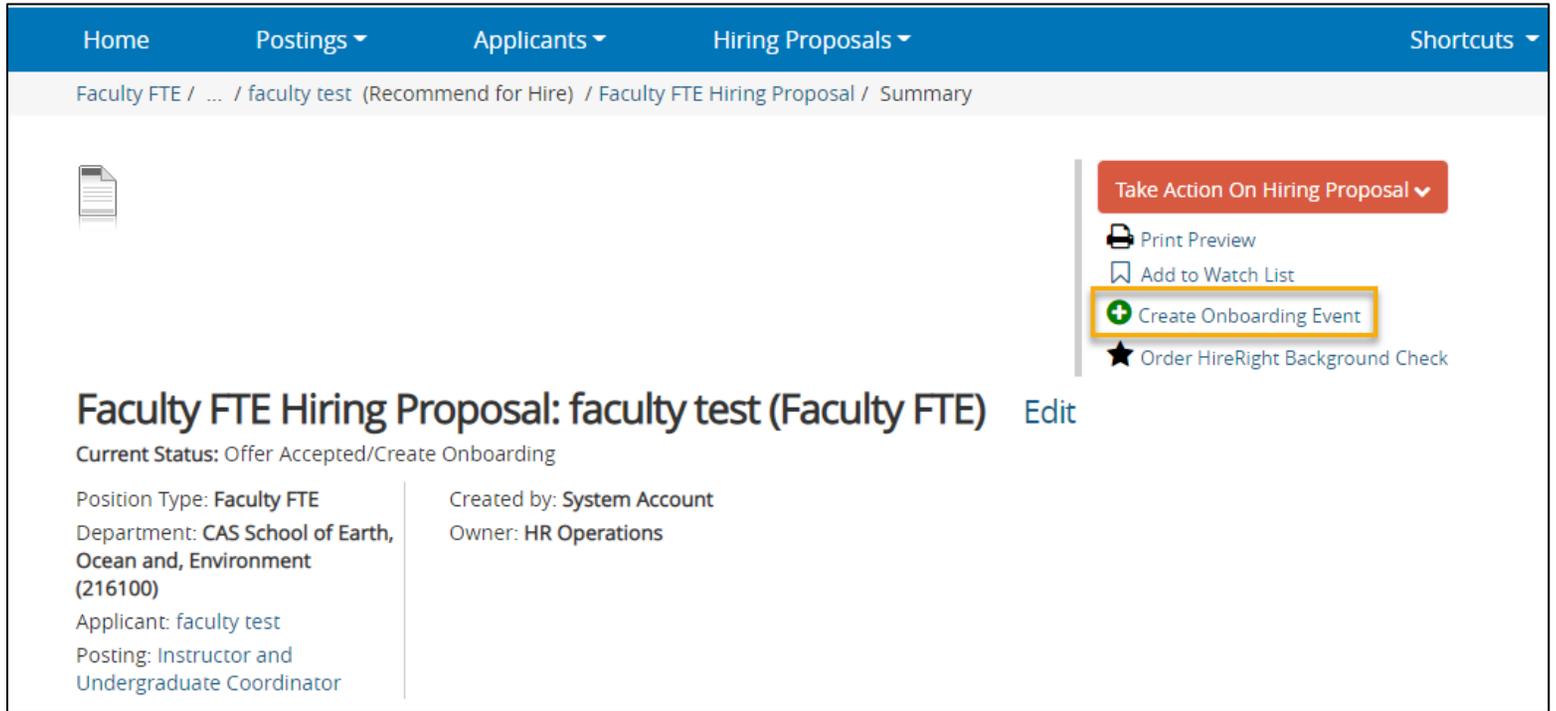


The screenshot shows a light blue notification banner at the top of the screen with the message: "Staff Pre-Hire Tasks selected for Onboarding Event." Below this is a dark blue footer banner with the text "Applicant Tracking System" on the left and "Welcome, Teresa Limpalair" on the right.

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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Home Postings ▾ Applicants ▾ Hiring Proposals ▾ Shortcuts ▾

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

Take Action On Hiring Proposal ▾

- Print Preview
- Add to Watch List
- Create Onboarding Event**
- Order HireRight Background Check

Faculty FTE Hiring Proposal: faculty test (Faculty FTE) Edit

Current Status: 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	

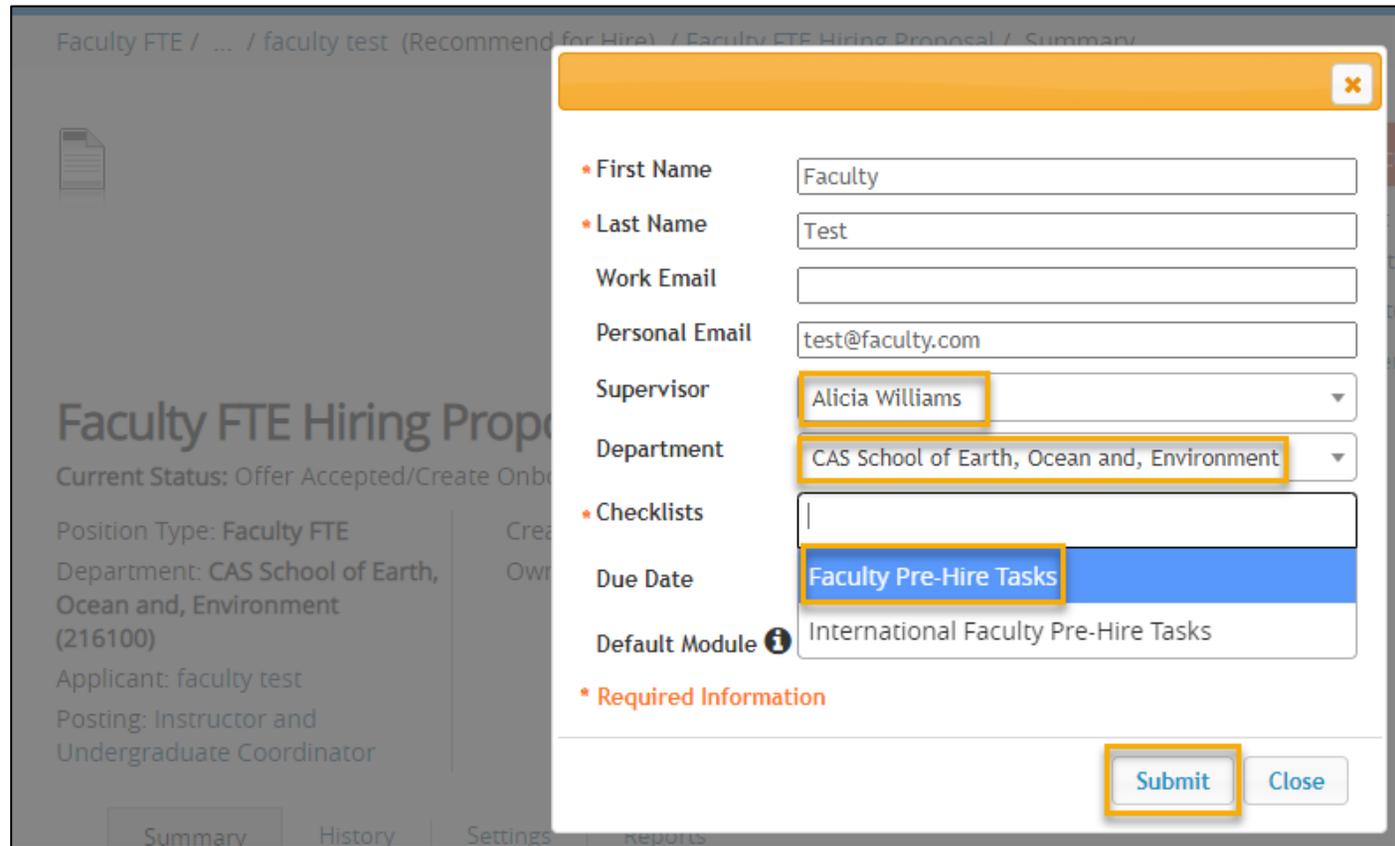
Step 2b: Assign the Onboarding tasks - Faculty.

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**. **NEVER assign International 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.



The screenshot shows the 'Faculty FTE Hiring Proposal' form in PeopleAdmin. A modal window is open for assigning tasks. The form fields are as follows:

- First Name:** Faculty
- Last Name:** Test
- Work Email:** (empty)
- Personal Email:** test@faculty.com
- Supervisor:** Alicia Williams
- Department:** CAS School of Earth, Ocean and, Environment
- Checklists:** Faculty Pre-Hire Tasks (selected)
- Due Date:** (empty)
- Default Module:** International Faculty Pre-Hire Tasks

Buttons for 'Submit' and 'Close' are visible at the bottom of the modal.

Faculty Pre-Hire Tasks selected for Onboarding Event.

Applicant Tracking System Welcome, Teresa Limpalair

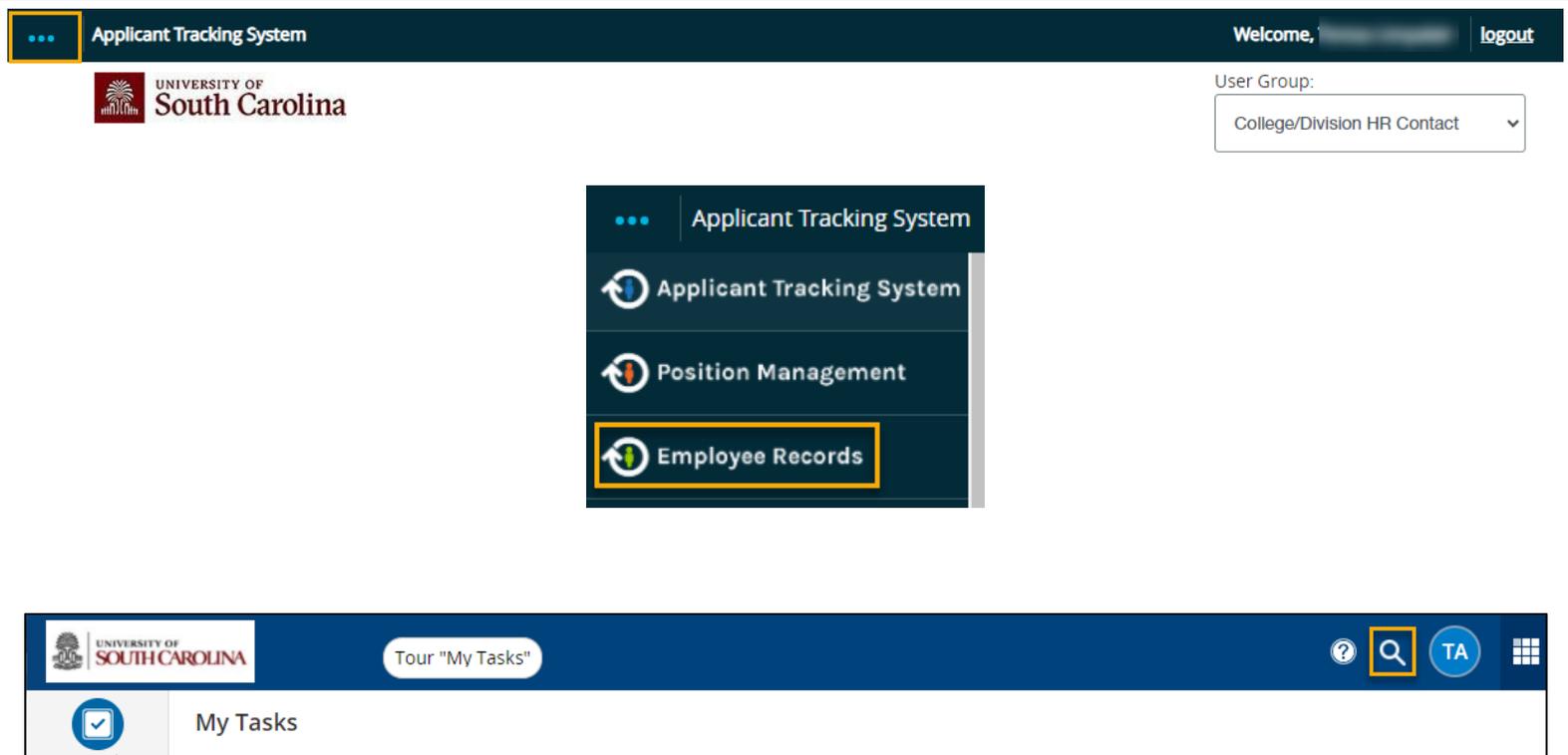
Step 3a: Viewing Onboarding Task Status in PeopleAdmin Records.

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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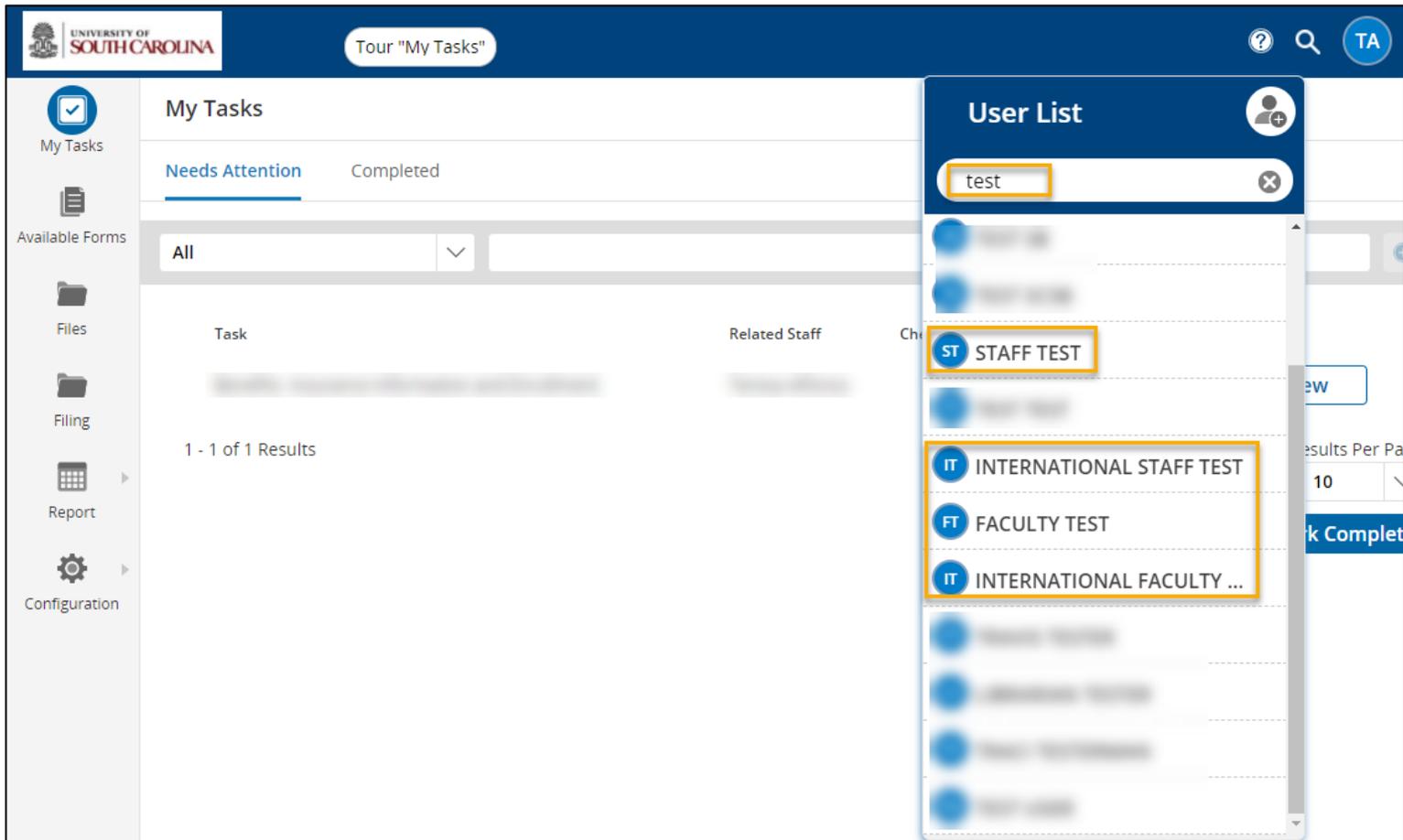
The screenshot shows the Applicant Tracking System interface. At the top, there is a dark blue header with the text "Applicant Tracking System" on the left, "Welcome, [redacted]" on the right, and a "logout" button. Below the header is the University of South Carolina logo. On the right side, there is a "User Group:" dropdown menu with "College/Division HR Contact" selected. In the center, a navigation menu is open, showing options: "Applicant Tracking System", "Position Management", and "Employee Records". The "Employee Records" option is highlighted with a yellow box. Below this, another screenshot shows the "My Tasks" view. The top bar of this view includes the University of South Carolina logo, a "Tour 'My Tasks'" button, and icons for help, search, and TA. The main content area shows a "My Tasks" section with a checkmark icon.

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 shows the PeopleAdmin interface. At the top, there is a navigation bar with the University of South Carolina logo, a search icon, and a 'TA' button. Below the navigation bar, the 'My Tasks' section is visible, with tabs for 'Needs Attention' and 'Completed'. A search box contains the text 'test'. A dropdown menu titled 'User List' is open, showing a list of users. The user 'ST STAFF TEST' is highlighted with a yellow box. Other users in the list include 'INTERNATIONAL STAFF TEST', 'FACULTY TEST', and 'INTERNATIONAL FACULTY ...'. The background shows a table with columns for 'Task', 'Related Staff', and 'Ch'. The table displays '1 - 1 of 1 Results'.

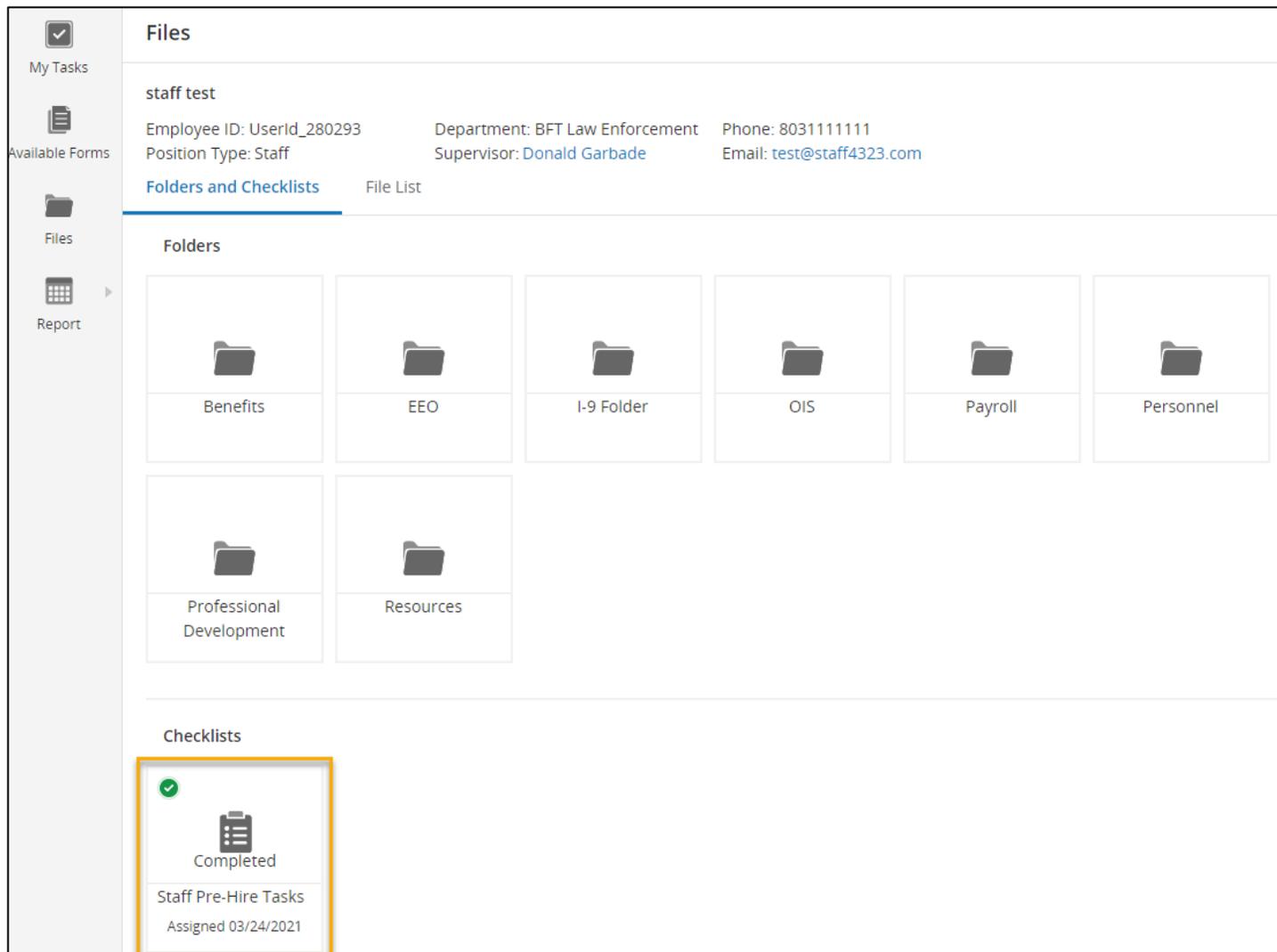
Step 3c: Viewing Onboarding Task Status in PeopleAdmin Records
continued.

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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The screenshot displays the 'Files' section in PeopleAdmin for a user named 'staff test'. The interface includes a left-hand navigation menu with options: My Tasks (checked), Available Forms, Files, and Report. The main content area shows employee details: Employee ID: UserId_280293, Department: BFT Law Enforcement, Supervisor: Donald Garbade, Phone: 8031111111, and Email: test@staff4323.com. Below this, there are two tabs: 'Folders and Checklists' (selected) and 'File List'. The 'Folders and Checklists' section contains a grid of folders: Benefits, EEO, I-9 Folder, OIS, Payroll, Personnel, Professional Development, and Resources. At the bottom, the 'Checklists' section shows a single checklist titled 'Completed Staff Pre-Hire Tasks' with a green checkmark icon and the text 'Assigned 03/24/2021'. This checklist item is highlighted with a yellow border.

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.

STAFF TEST ✕

✔ Complete
Staff Pre-Hire Tasks (100%)

		Task	Responsible	Status
<input checked="" type="checkbox"/>		Critical Information Needed From You to Complete Your Hire	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

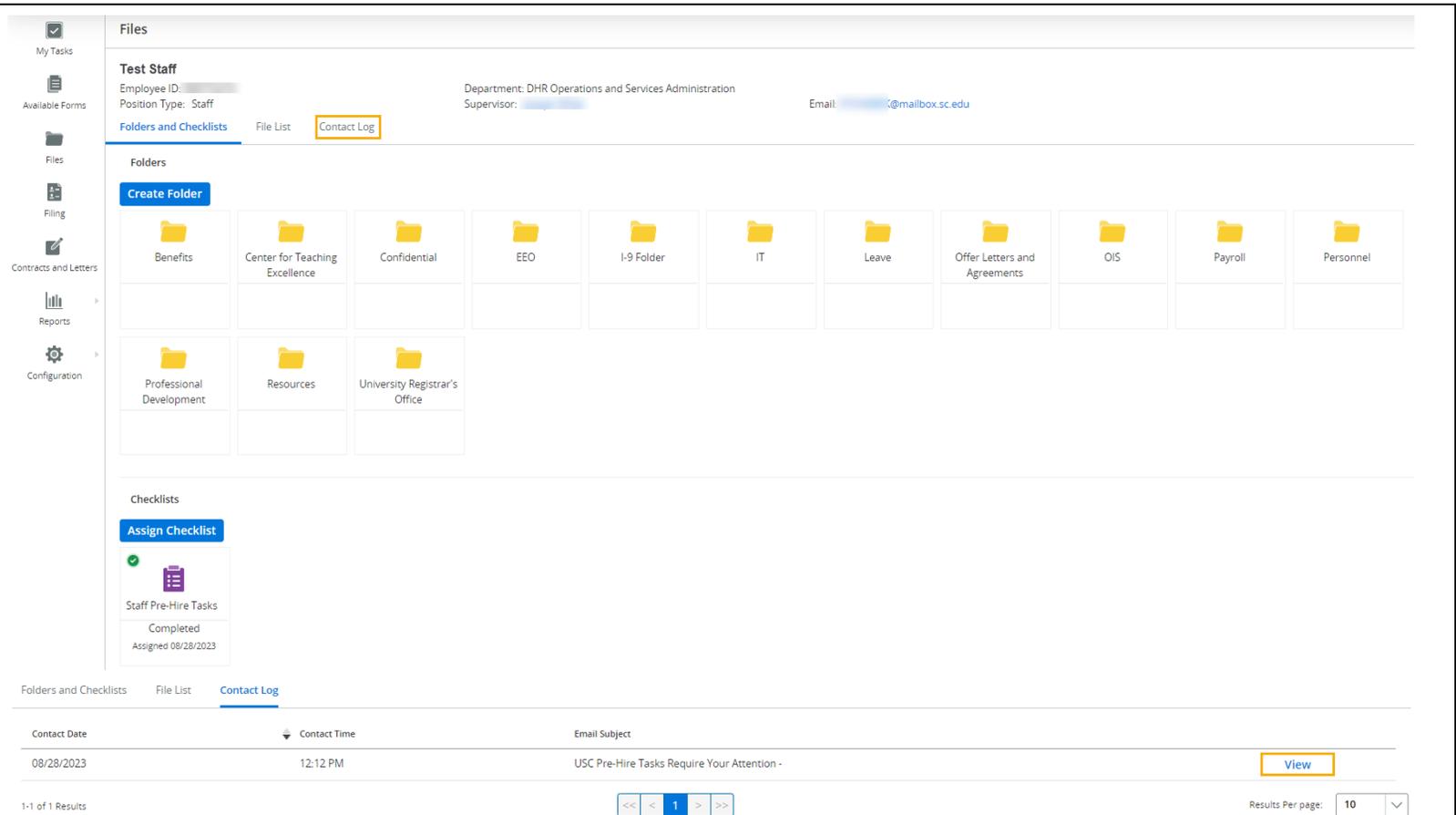
Step 4a: View the Contact Log

Click on the **Contact Log** header to view all automated system communications that have been sent to the employee.

The Contact Log will display 10 results per page (if applicable). If the individual takes action upon receipt of initial email, no additional communications occur. However, if the individual does not take action timely the system will send automatic reminders.

Click the **View** button next to the communication you wish to view.

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The screenshot shows the PeopleAdmin interface for a staff member. The top navigation bar includes 'My Tasks', 'Available Forms', 'Files', 'Filing', 'Contracts and Letters', 'Reports', and 'Configuration'. The main content area is titled 'Test Staff' and includes employee details: Employee ID, Position Type: Staff, Department: DHR Operations and Services Administration, Supervisor, and Email. Below this, there are tabs for 'Folders and Checklists', 'File List', and 'Contact Log' (which is highlighted). The 'Folders and Checklists' section displays a grid of folders: Benefits, Center for Teaching Excellence, Confidential, EEO, I-9 Folder, IT, Leave, Offer Letters and Agreements, OIS, Payroll, and Personnel. Below the folders, there is a 'Checklists' section with an 'Assign Checklist' button and a card for 'Staff Pre-Hire Tasks' showing 'Completed' and 'Assigned 08/28/2023'. At the bottom, the 'Contact Log' table is visible with columns for Contact Date, Contact Time, and Email Subject. A single entry is shown for 08/28/2023 at 12:12 PM with the subject 'USC Pre-Hire Tasks Require Your Attention -'. A 'View' button is next to this entry. The bottom of the page shows '1-1 of 1 Results' and 'Results Per page: 10'.

Step 4b: View the Contact Log

The Contact Log View presents the entire email that was sent to the employee, including all clickable links. Scroll to see the entire communication.

Click the **Close** button when you've finished your review.

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.**

Contact Log - View ✕

Test Staff

Contact Date	08/28/2023
Contact Time	12:12 PM
Email Subject	USC Pre-Hire Tasks Require Your Attention -
Sent To	teststaffemailfake@gmail.com

USC Pre-Hire Tasks Require Your Attention -

Dear [REDACTED],

Welcome to the University of South Carolina system!

Let's complete your hire. This step is time-sensitive and triggers several others. Immediate action is required to ensure you receive timely system access and pay.

Use Google Chrome to ensure browser compatibility.

U.S. Citizens: Please complete steps 1-4 below. Please contact HR at peoplead@mailbox.sc.edu with any questions.

For Non-U.S. Citizens Only: The HR Office of International Services (HR-OIS) is responsible for assisting non-U.S. citizens joining the University. If you are a non-U.S. citizen and have not already done so, please provide HR-OIS with information about your current or most recent immigration status in the U.S. If you are currently outside the U.S. and have never visited the U.S., please let us know. Please familiarize yourself with the pre-hire tasks by following steps 1-4 below, but kindly wait to complete them until HR-OIS confirms it is time to do so. *Non-U.S. Citizens are welcome to contact OIS@sc.edu with any questions.*

Close