

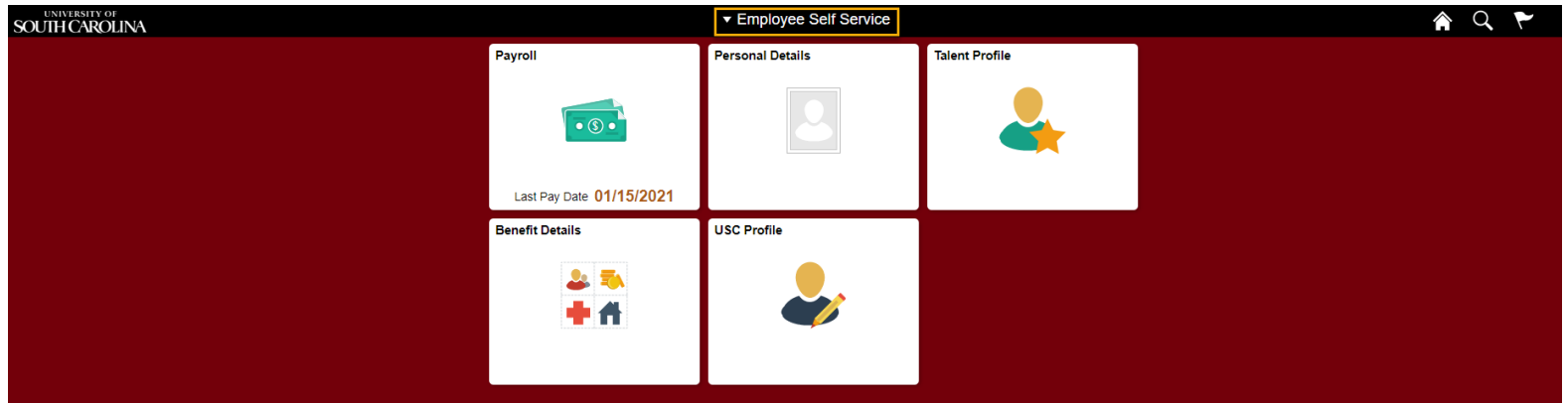
University of South Carolina - Division of Human Resources
Manager Self-Service: View New Employee Onboarding Summary, Job Information, and
Personal information in HCM

How to view new employee onboarding summary and other job/personal information for your employees in HCM PeopleSoft:
 This job aid outlines the process for Managers to view certain information for their employees through Manager Self-Service in HCM PeopleSoft. Managers can view the onboarding summary for their new employees, view job information, and specific personal information such as emergency contact(s).

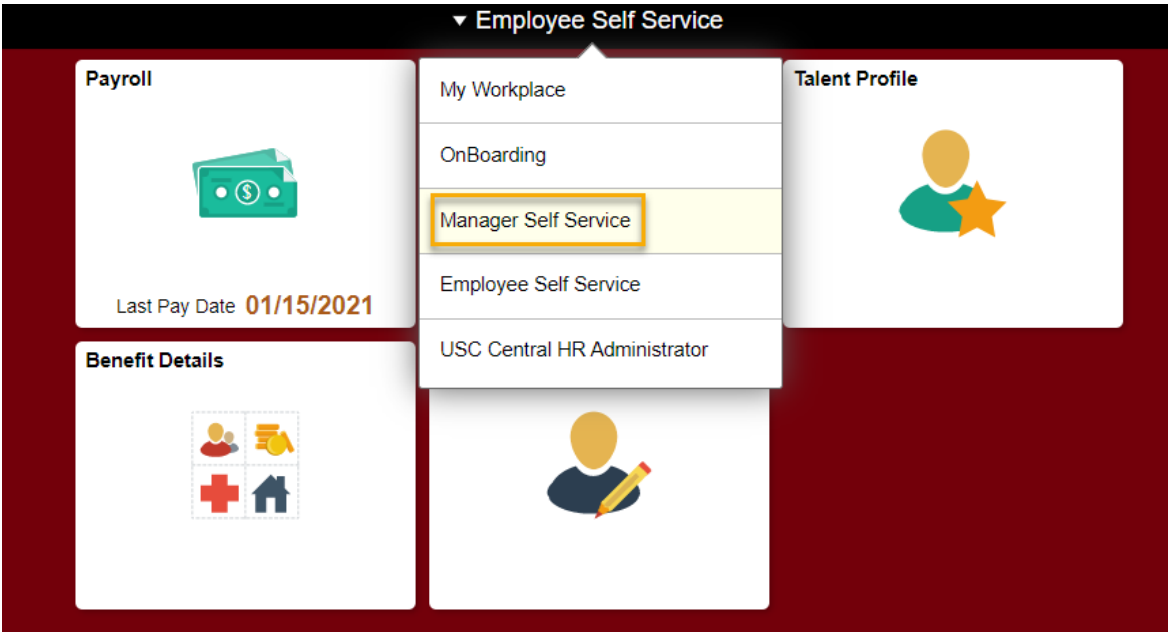
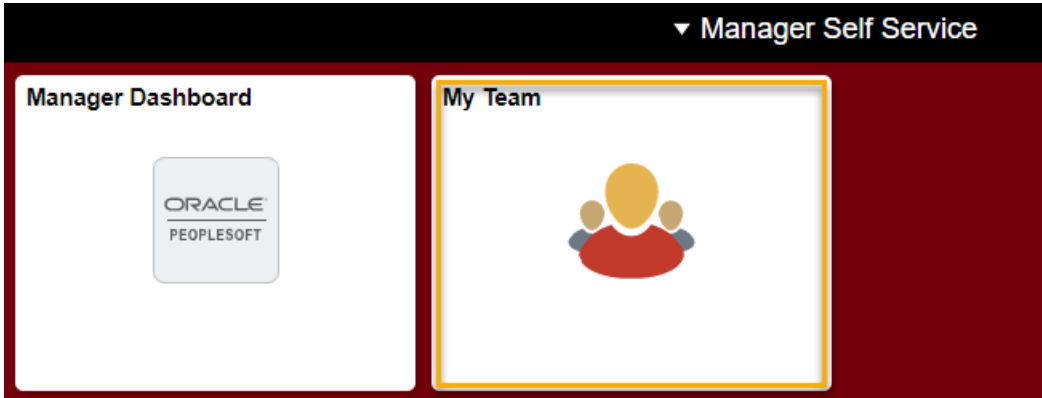
Processing Steps

Step 1: On the main homepage, click the **Employee Self Service** drop-down menu button.

Screen Shots



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<p>Step 2: Click the Manager Self-Service option.</p>	 <p>The screenshot shows the 'Employee Self Service' dropdown menu. The 'Manager Self Service' option is highlighted with a yellow border. Other options include 'My Workplace', 'OnBoarding', 'Employee Self Service', and 'USC Central HR Administrator'. The background shows tiles for 'Payroll' (Last Pay Date 01/15/2021), 'Benefit Details', and 'Talent Profile'.</p>
<p>Step 3: Click the My Team tile to begin.</p>	 <p>The screenshot shows the 'Manager Self Service' dashboard. The 'My Team' tile is highlighted with a yellow border. The 'Manager Dashboard' tile features the Oracle PeopleSoft logo.</p>

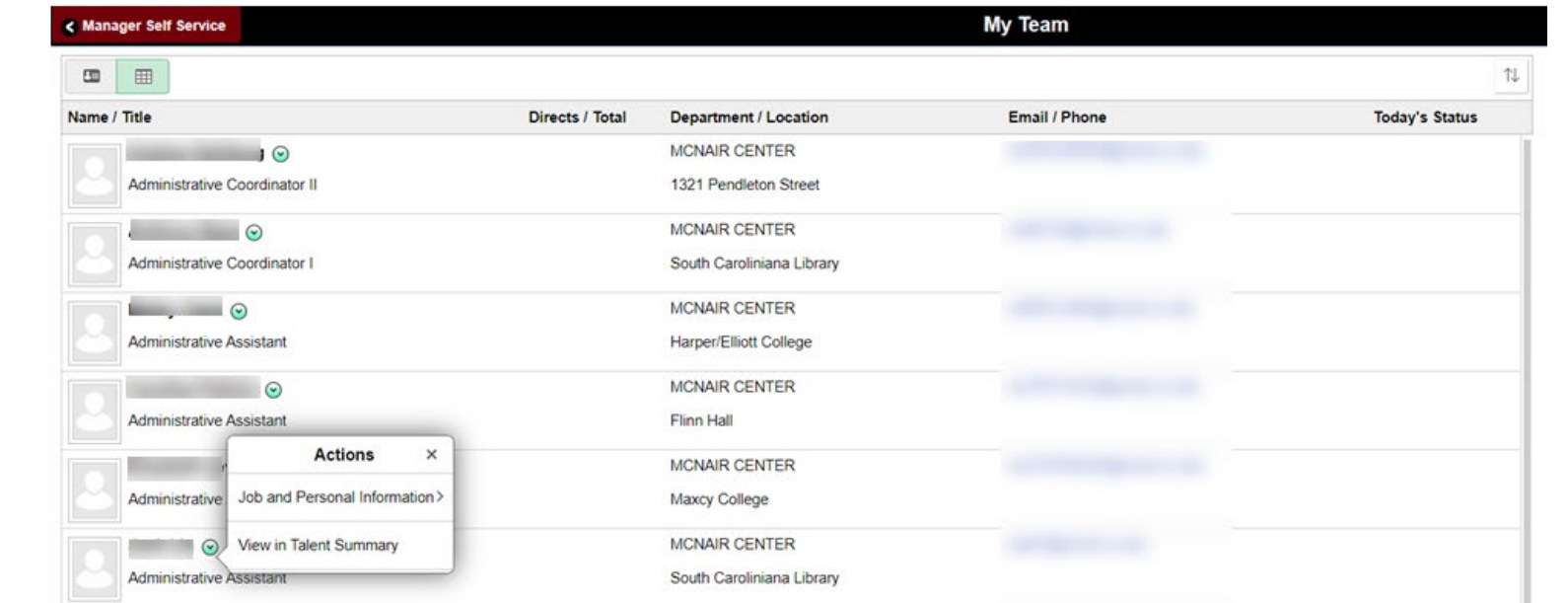
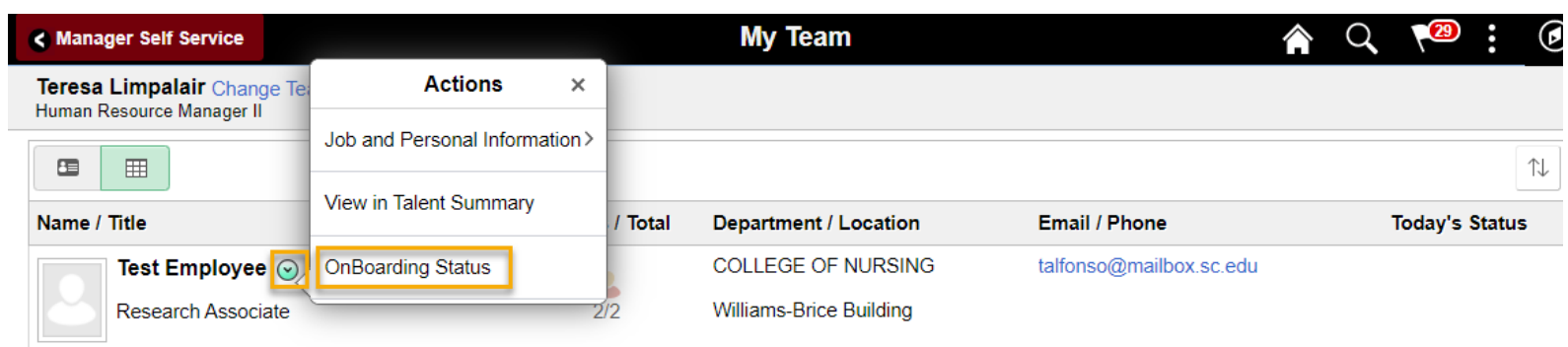
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Manager Self-Service: View New Employee Onboarding Summary, Job Information, and Personal information in HCM

Step 4: My Team page

On the View **My Team** page, you will see all of your direct reports. The manager in this example only has one direct report, *Test Employee*.

Click the **Related Actions** menu button (small green circular button next to the employee's name) to view available options. Click the **Onboarding Status** option.

Note if an employee has not yet started their HCM onboarding tasks the **Onboarding Status** option will not appear in the **Related Actions** menu as shown in the screenshot.



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Manager Self-Service: View New Employee Onboarding Summary, Job Information, and
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Step 5a: Summary View

Test Employee has started and completed several of their HCM Onboarding tasks. Determine the status of each task by looking at the **Status** column in the search results as shown in the screenshot.

- Not Started
- Visited
- Complete (steps will not appear as complete until the employee clicks the **Mark Complete** button.)

(Continued on next page)

< My Team
Onboarding Status
🏠 🔍 📧 23 ⋮

Test Employee
 Research Associate
 UofSC Employee Onboarding

Summary

Remind Employee

The steps for OnBoarding and their statuses are listed. If the employee has not completed the OnBoarding Process, you may use the "Remind Employee" button to send a reminder notification to the employee to complete it.

Steps 14 rows

Step	Status	Required	Date Completed	Completed By
Message from UofSC President and Instructions	✔ Complete	No	03/18/2021	Test Employee
Direct Deposits - One minimum/required, three maximum	✔ Complete	Yes	03/18/2021	Test Employee
Federal - W4	● Visited	No		
State of SC - W4	● Visited	No		
Security Awareness Training	✔ Complete	Yes	03/18/2021	Test Employee
Required Acknowledgements	✔ Complete	Yes	03/18/2021	Test Employee
Benefits Enrollment Information	✔ Complete	No	03/18/2021	Test Employee
Entering Working Hours and Leave	✔ Complete	No	03/18/2021	Test Employee
Addresses	✔ Complete	No	03/18/2021	Test Employee
Emergency Contacts	● Visited	No		
Degrees	● Visited	No		
Ethnic Groups	○ Not Started	No		
Disability	○ Not Started	No		
Veteran Status	○ Not Started	No		

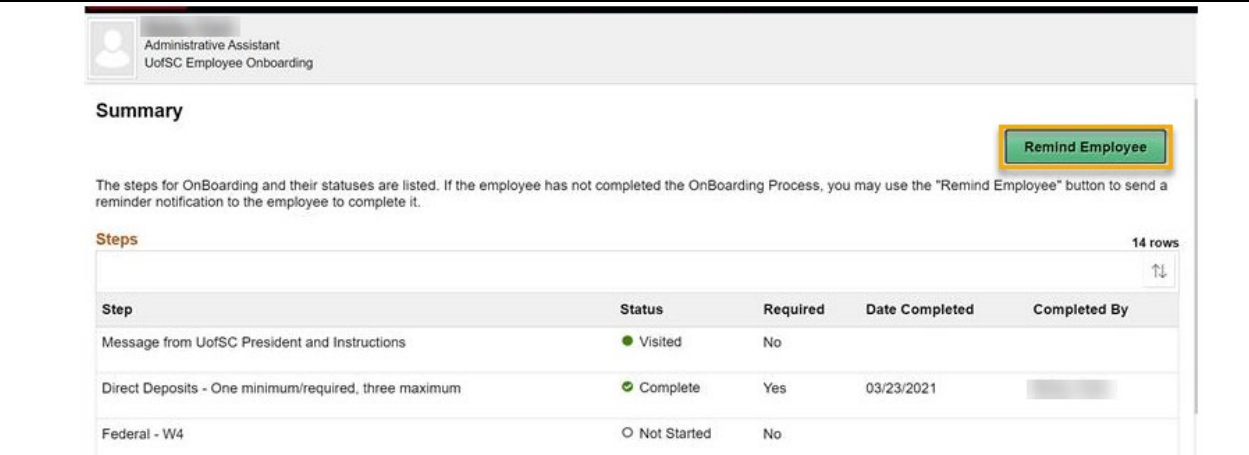
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Manager Self-Service: View New Employee Onboarding Summary, Job Information, and Personal information in HCM

Step 5b: Summary View *continued*

As manager, you have the ability to remind your new employees to complete onboarding tasks directly in HCM. Click the **Remind Employee** button in the top right corner and the employee will receive an email reminder.

Notice in the second screenshot the employee has completed all required onboarding tasks. With all onboarding tasks completed, the **Remind Employee** button no longer appears.



Administrative Assistant
UofSC Employee Onboarding

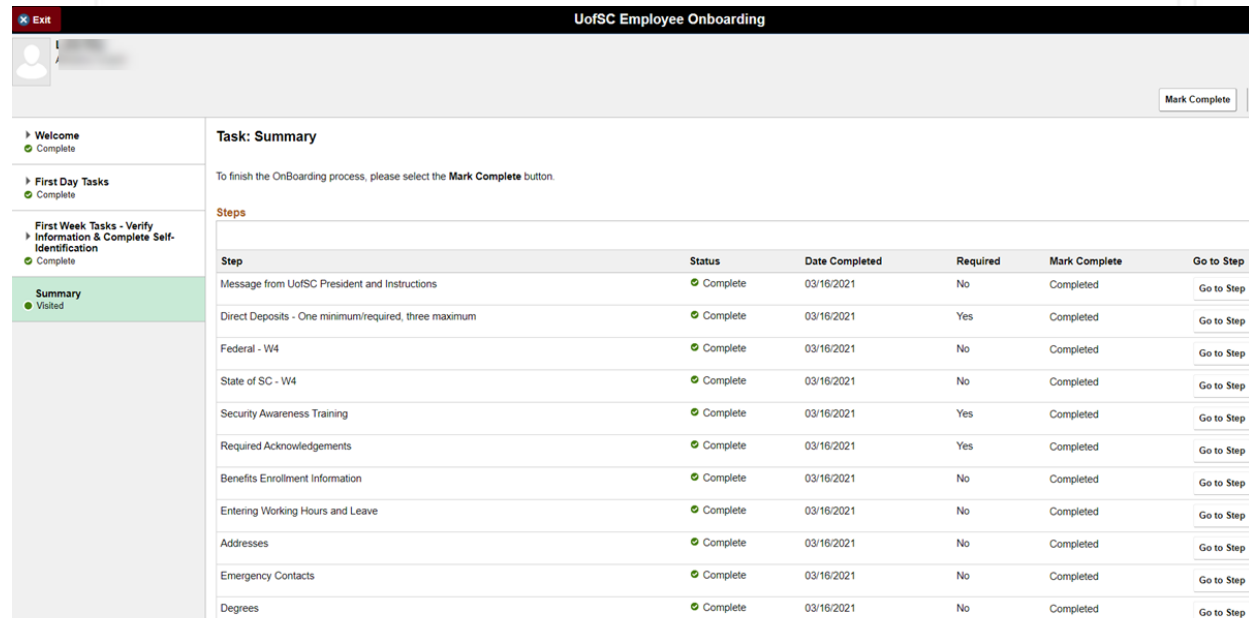
Summary

The steps for OnBoarding and their statuses are listed. If the employee has not completed the OnBoarding Process, you may use the "Remind Employee" button to send a reminder notification to the employee to complete it.

Remind Employee

Steps 14 rows

Step	Status	Required	Date Completed	Completed By
Message from UofSC President and Instructions	● Visited	No		
Direct Deposits - One minimum/required, three maximum	● Complete	Yes	03/23/2021	
Federal - W4	○ Not Started	No		



UofSC Employee Onboarding

Mark Complete

- >Welcome ● Complete
- First Day Tasks ● Complete
- First Week Tasks - Verify Information & Complete Self-Identification ● Complete
- Summary ● Visited**

Task: Summary

To finish the OnBoarding process, please select the **Mark Complete** button.

Steps

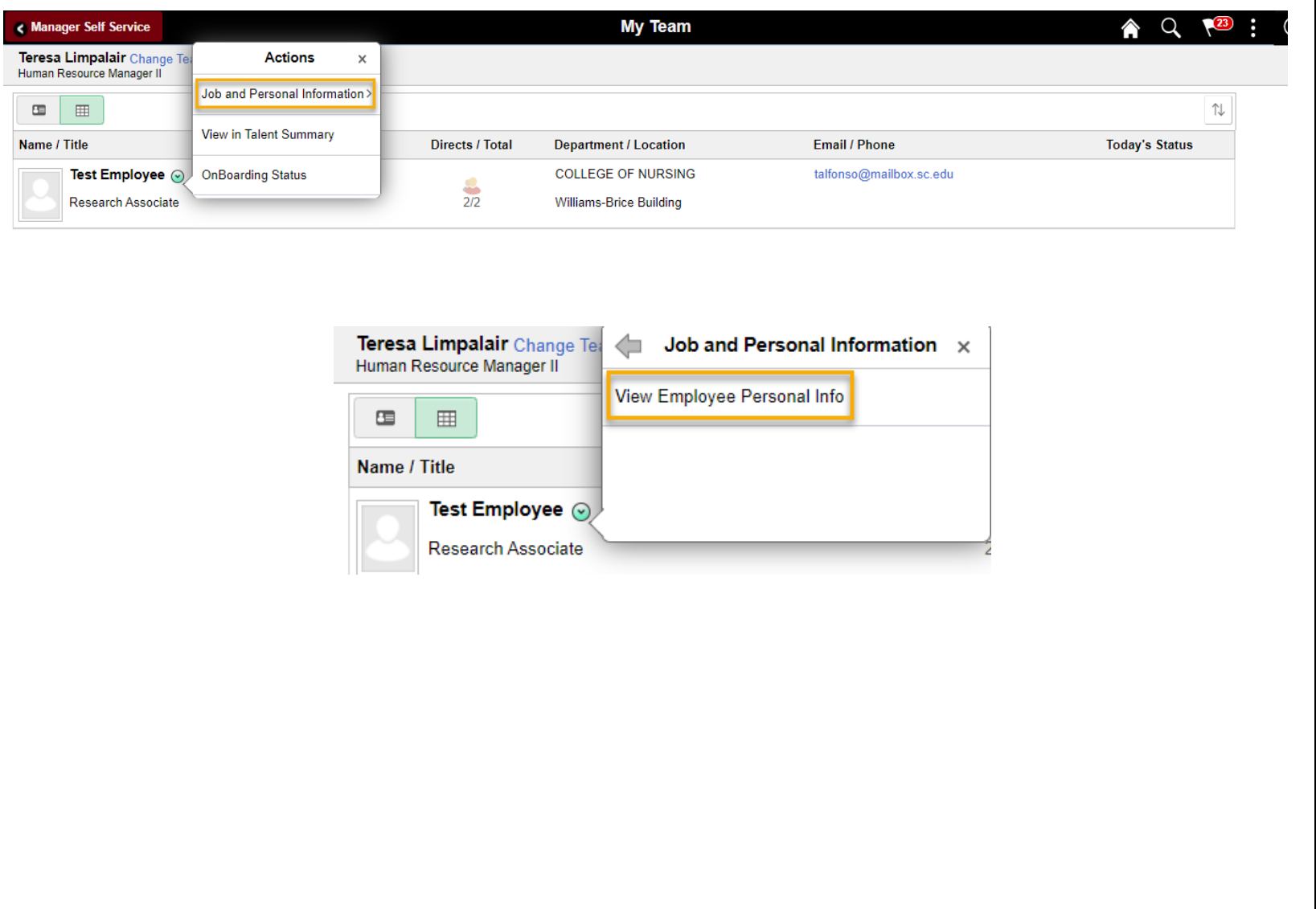
Step	Status	Date Completed	Required	Mark Complete	Go to Step
Message from UofSC President and Instructions	● Complete	03/16/2021	No	Completed	Go to Step
Direct Deposits - One minimum/required, three maximum	● Complete	03/16/2021	Yes	Completed	Go to Step
Federal - W4	● Complete	03/16/2021	No	Completed	Go to Step
State of SC - W4	● Complete	03/16/2021	No	Completed	Go to Step
Security Awareness Training	● Complete	03/16/2021	Yes	Completed	Go to Step
Required Acknowledgements	● Complete	03/16/2021	Yes	Completed	Go to Step
Benefits Enrollment Information	● Complete	03/16/2021	No	Completed	Go to Step
Entering Working Hours and Leave	● Complete	03/16/2021	No	Completed	Go to Step
Addresses	● Complete	03/16/2021	No	Completed	Go to Step
Emergency Contacts	● Complete	03/16/2021	No	Completed	Go to Step
Degrees	● Complete	03/16/2021	No	Completed	Go to Step

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Manager Self-Service: View New Employee Onboarding Summary, Job Information, and Personal information in HCM

Step 6a (Optional):

Other Viewable data for direct reports includes select **Job and Personal Information** as well as **Talent Summary**.

Click the **Related Actions** menu button to view available options. Click the **Job and Personal Information** option, then click **View Employee Personal Info**.



The screenshot shows the 'Manager Self-Service' interface for 'My Team'. A team member card for 'Test Employee' (Research Associate) is visible. An 'Actions' menu is open over the card, with 'Job and Personal Information' highlighted. Below the card, a table lists team members with columns for Name/Title, Directs/Total, Department/Location, Email/Phone, and Today's Status.

Name / Title	Directs / Total	Department / Location	Email / Phone	Today's Status
Test Employee Research Associate	2/2	COLLEGE OF NURSING Williams-Brice Building	talfonso@mailbox.sc.edu	

A second screenshot shows the 'Job and Personal Information' sub-menu with 'View Employee Personal Info' highlighted.

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Manager Self-Service: View New Employee Onboarding Summary, Job Information, and
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Step 6b (Optional): Job and Personal Information

Viewing Employee Information provides you with an overview of their position information as well as options to view their emergency contacts and their month/day of birth.

Click **Emergency Contacts** on the Employee Information page. Then click on the Emergency Contact's name to view their contact information.

(Continued on next page)

Employee Information



Test Employee

Research Associate

Actions ▾

Personal Information

Empl ID	A00215224	First Start Date	03/18/2021
Position	Research Associate	00773229	Department COLLEGE OF NURSING 112000
Job Code	Research Associate	UG83	Location Williams-Brice Building 056
Company	University of South Carolina	USC	Regular/Temporary Research Grant
Business Unit	USC Columbia	SCCOL	Full/Part Time Part-Time

Additional Information

[Birthday](#)

[Emergency Contacts](#)

[Employee Information](#)

Emergency Contacts

Test Employee

Actions ▾

Contact Name	Relationship to Employee	Primary Contact
Test Emergency Contact	Friend	<input checked="" type="checkbox"/>

[Return to Employee Information](#)

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Manager Self-Service: View New Employee Onboarding Summary, Job Information, and
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Step 6c (Optional): Job and Personal Information continued

View the employee's Emergency Contact detail including their name, relationship to employee, address (if provided) and telephone number (if provided).

Click the **Return to Emergency Contacts** link to go back to the previous page.

(Continued on next page)

[Emergency Contacts](#)

Emergency Contact Detail

Test Employee

Address and Telephone

Contact Name Test Emergency Contact
 Relationship to Employee Friend
 Contact has the same address as the employee
 Contact has the same telephone number as the employee

Address

Country
 Address

Employee's Current Address

Country United States
 Address 191 Sample Lane
 Columbia, SC 29205
 Richland

Phone

Telephone Extension

Other Telephone Numbers

Phone Numbers

Phone Type	Phone Number	Extension	Delete
Mobile	803/111-1111		

[Return to Emergency Contacts](#)

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Manager Self-Service: View New Employee Onboarding Summary, Job Information, and
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Step 6d (Optional): Job and Personal Information continued

Click the **Return to Employee Information** link to go back to the Employee Information page and view the birth month/day.

Click the **BirthDay** link.

View the employee's birth month/day.

Click the **Return to Select Employees** link to return to the main **My Team** page.

[Employee Information](#)

Emergency Contacts

[Test Employee](#)

Actions ▾

Contact Name	Relationship to Employee	Primary Contact
Test Emergency Contact	Friend	<input type="checkbox"/>

[Return to Employee Information](#)

Employee Information



[Test Employee](#)

Research Associate

Actions ▾

Personal Information

Empl ID	A00215224	First Start Date	03/18/2021	112000
Position	Research Associate	Department	COLLEGE OF NURSING	056
Job Code	Research Associate	Location	Williams-Brice Building	
Company	University of South Carolina	Regular/Temporary	Research Grant	
Business Unit	USC Columbia	Full/Part Time	Part-Time	

Additional Information

[BirthDay](#)

[Emergency Contacts](#)

[Return to Select Employees](#)

[Employee Information](#)

BirthDay

[Test Employee](#)

Actions ▾

BirthDay September 11

[Return to Employee Information](#)

[Return to Select Employees](#)

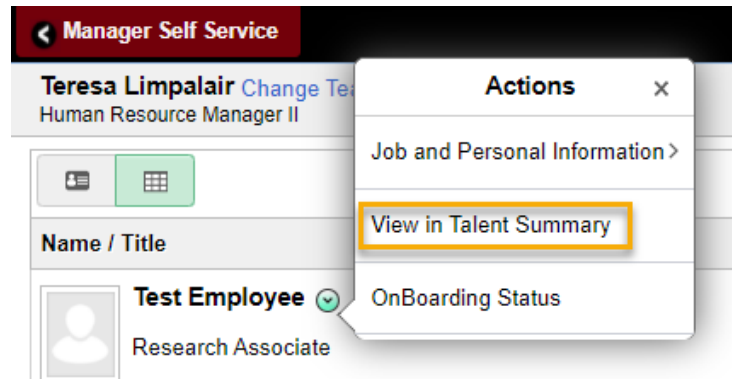
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Manager Self-Service: View New Employee Onboarding Summary, Job Information, and Personal information in HCM

Step 7 (Optional): View in Talent Summary

Click the **Related Actions** menu button and then click the **View in Talent Summary** link.

The **Talent Summary** page provides different information than what was shown previously on the Employee Information page including time in current job.

To exit this page, click the **Return to Manager Dashboard** link.



Manager Self Service

Teresa Limpalair [Change Text](#)
Human Resource Manager II

Actions [X]

- Job and Personal Information >
- View in Talent Summary**
- OnBoarding Status

Name / Title

Test Employee [Down Arrow]
Research Associate

Talent Summary

Test Employee [Down Arrow]

▼ **Actions**



Job Title Research Associate
Job Code UG83
Work Phone
Location Williams-Brice Building
Email talfonso@mailbox.sc.edu
Employee ID A00215224

HR Status Active
Org Relationship Employee
Years in Current Job 0.1
Full/Part Time Part-Time

[Return To Manager Dashboard](#)