Creating and Assigning Additional Onboarding Tasks

Hiring Managers can create and assign additional onboarding tasks to members of their team.

- 1. Navigate to the **My New Hire Tasks** using the side menu.
- 2. Search for the specific employee(s) using the search function.

Bulk Complete						
My new hire tasks						
Employee: Brook Staples Jane Doe Steve Rogers	Task: Card Acces Elon Accou Employee Keys Office Euro	int Performance revie	w		Clear	Search
select 🔽 Title	Employee	BadgeID	Step due	Hiring manager		Job
Organize coffee	Brook Staples		Mar 24, 2018	Harry Hire		Research Assi

3. Click on View All Tasks (blue text) on the right side of the screen beside the new employee.

						Jobs	People	Recent items 🗸	Harry 🗸	? ~
Bulk Complete										
My new hire tasks Employee: Brook Staples Jane Doe Store Rogers	Task: Card Access Elon Accour Employee P Keys Office Europ	it erformance review			Clear Search					
select 💌 Title	Employee	BadgeID	Step due	Hiring manager	Job		Sta			
Organize coffee	Brook Staples		Mar 24, 2018	Harry Hire	Research Assistant - College of Medicine		Ma	r.		ew all tasks

4. Click **Add Optional Tasks** on the left side of the screen.

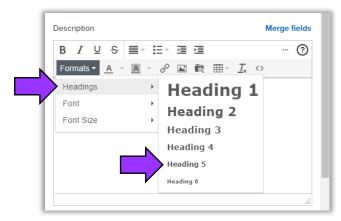
		Jobs	People Settings	Recent items V Quic	k search Q
New hire tasks					
Steve Rogers Position Academic Affairs Operations and Resource Manager					Add new task
Start date Feb 20, 2023	Task	Assigned to	Due date	Status	
Notify updates	Prior to the First Day				+ Add
Add optional tasks	E-Verify Information	Steve Rogers	23 Feb 202	3 Completed	L
No tasks	Office Furniture	Ronald Recruiter	15 Feb 202	B Overdue	L
My Favorite Tasks 🗸	Technology Needs	Ronald Recruiter	15 Feb 202	3 Overdue	2

- 5. A **New Task** pop-up window will appear.
- 6. Add a required **Title** to the new onboarding task (e.g., FERPA Training).
- 7. Select the required **Group** from the dropdown list depending on when you wish for the new employee to complete the task: Prior to the First Day, First Day, First Week, or First 30 Days.
- 8. If known, enter a **Due Date** and a **Due Time**.
- 9. Enter the task **Description** in the text box. You can click on the three dots (ellipsis) to expand the toolbar.

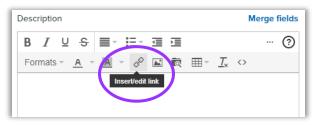
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- 10. To be consistent with the pre-loaded onboarding tasks, you can add title within the task description textbox using Heading 5.
 - a. First, type the title in the text box.
 - b. Highlight the title (hold left mouse button + drag across title to select).
 - c. Go to Formats >> Headings >> Heading 5



11. You have the option to hyperlink text in the task.



- 12. Next, you assign the task to both the manager and employee, the manager, or the employee by clicking on the appropriate radio button. "Task allocated to" is a required field.
- 13. (Optional) If you will be using the onboarding task on a regular basis, check the box next to Add to favorites.
- 14. Once all the required field are completed, the Create pill button changes from gray to blue. Click Create.
- 15. Clicking the Create button closes the window. The new task now appears on the **New Hire Tasks** screen in the **Group** that you assigned it to. Notice that the added onboarding task has icons for editing and deleting the task on the right side of the screen.