Onboarding

PageUp delivers an outstanding onboarding experience tailored to each new starter's role. This system makes completing payroll forms, learning and other induction tasks easy and in one central location.

Set Up the Initial Onboarding Process

1. Navigate to the **ONBOARDING** section of the **Hiring Proposal Details**.
   ONBOARDING FORM (*) – For new hires, be sure the **Onboarding Form** is set to 'New Hire Form'.

   ONBOARDING WORKFLOW (*) – You have three options to choose from for STAFF onboarding:
   1. New Staff Member – Select this choice if the new hire has not previously been an Elon University employee. It will trigger the comprehensive onboarding workflow for the new employee, the supervising manager, or an onboarding delegate.
   2. No Onboarding – Select this choice if the selected employee does not require onboarding, because the person is currently employed in another role at Elon University and have already completed the required new hire documentation.
   3. Temporary Employee – This choice provides the essential onboarding tasks for temporary employees.

   REPORTS TO MANAGER (*) – Type the manager's name into the text box and select the magnifying glass ( ) to search for that user. An email address will populate the blue box beneath the approver's name when the user is found.

   ONBOARDING DELEGATE – If a Department Admin is going to manage the onboarding process for a new hire, this 'Onboarding Delegate' can be identified. Type the delegate's name into the text box and select the magnifying glass ( ) to search for that user. An email address will populate the blue box beneath the approver's name when the user is found.

2. Be sure to select **Save and Close** or **Save** at the bottom of the screen.

Manage the Onboarding Process

Employee Access to Onboarding

NOTE: Before employees can gain access to the **Employee Portal**, they must:

1. Log into PageUp by clicking on the **Applicant Login** button at the top right corner of jobs. elon.edu (or through an email sent to their personal email address).
2. Review the offer letter.
3. Check the box beside "I have read and agreed to the terms of the offer".
4. Click the "**I accept**" button.

Once the new employee accepts the offer, the person can log into the **Employee Portal.**

Within the Employee Portal, the new employee will see the assigned onboarding tasks categorized as:

1. Prior to First Day
2. First Day
3. First Week
4. First 30 Days

Hiring Manager / Onboarding Delegate Access Onboarding Tasks

There are multiple ways to access new hire onboarding tasks:

1. From the Side Menu, select **My New Hires** or **My New Hire Tasks** (under **Workflows** section).
2. New hire tasks can also be viewed from the **Offers** tile by clicking on **New Hire Tasks** or **New Hires (**and then **View All Tasks).**

My New Hires Navigation

NOTE: My New Hires and My New Hire Tasks provide different navigation experiences. This section describes what is seen when **My New Hires** is selected from the Side Menu or **New Hires** is selected from the Offers tile.

1. Click on **View All Tasks** on the right side of the screen for a given new hire to show a list view of the tasks, who they were assigned to, the due date, and the status
2. Click on the task name to open a pop-up window with the task description.

My New Hire Tasks Page Navigation

See the corresponding descriptions below for each numbered item.

1. **Bulk Complete**: Ability to check assigned tasks and mark as completed.
2. **Employee Filter**: Ability to filter tasks by the employee.
3. **Task Filter**: Ability to filter tasks by the task.
4. **Filter Search/Clear**: Initiate or clear any filters. Note – Any filters previously in place will carry over when next visiting this page.
5. **Task Details**: Currently open (uncompleted) tasks that are assigned to the logged in user.
   a. **Title**: Title of the assigned task
   b. **Employee**: Name of new hire
   c. **Badge ID**: N/A
   d. **Step Due**: Onboarding task completion due date
   e. **Hiring Manager**: New hire 'reports to' manager
   f. **Job**: New hire job title
   g. **Start date**: New hire start date
   h. **View all tasks**: Redirect to view all tasks assigned to a new hire

Complete and Close Assigned Tasks

1. Click on the title of the applicable task.
2. The task pop-up box will appear. Complete the task as directed. Click **Mark as completed**.