

Onboarding Training Resource Guide

Onboarding is initiated through the Offer Card process. For more information, refer to the [Offer Process Guide](#) on the DHRM website. **New Hires must accept the offer through PageUp to gain access to the Onboarding portal.**

At the “Onboarding Details” section on the offer card, complete the following fields to activate onboarding:

- A. *Onboarding Form*: New hire form
- B. *Onboarding Workflow*: Onboarding
- C. *Reports to Manager*: Manager who will be responsible for overseeing the onboarding process.
- D. *HR Rep/Onboarding Delegate*: Agency HR Rep who will be responsible for overseeing the onboarding process (if applicable).
- E. *HR Rep/Onboarding Delegate 2*: Secondary agency HR Rep who will be responsible for overseeing onboarding process (if applicable).

ONBOARDING DETAILS

Position title: Senior Test Developer

A Onboarding Form:* New hire form

B Onboarding Workflow:* Onboarding

C Reports to manager:* Melissa McRecruiter
ponnette.smith+recruiter@dhrm.virginia.gov ▾

D HR Rep / Onboarding Delegate:
No user selected.

E HR Rep / Onboarding Delegate 2:
No user selected.

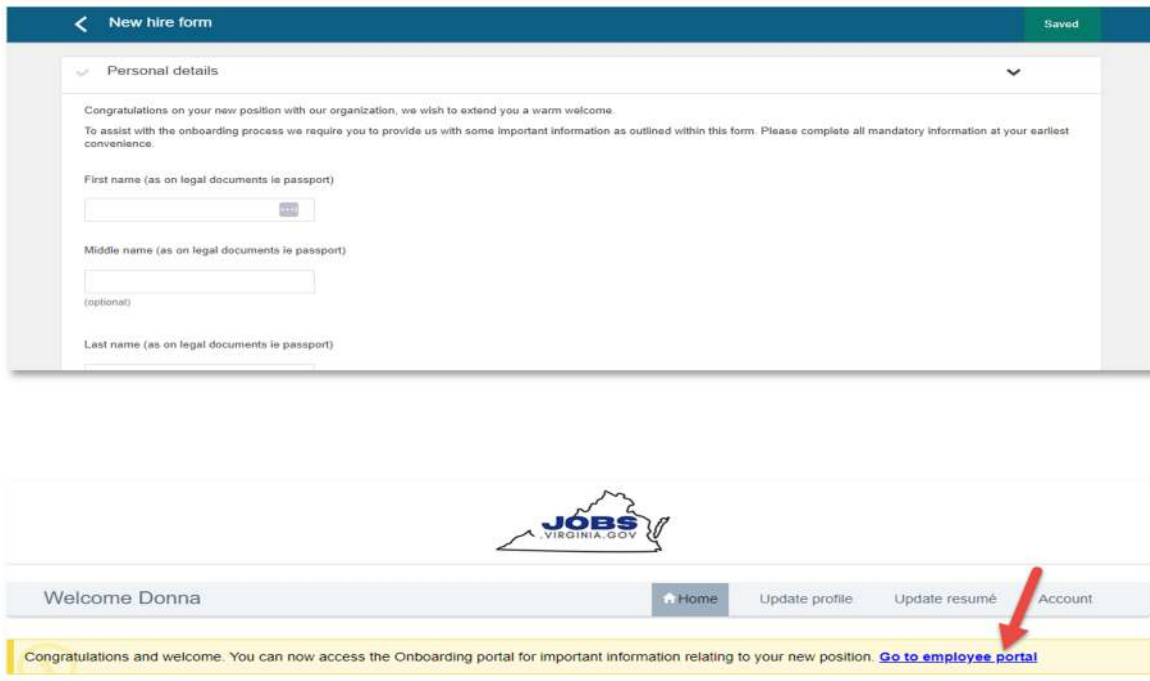
Complete the remaining steps of the [Offer Process Guide](#) including the [Approval Process](#).

Applicant / New Hire View

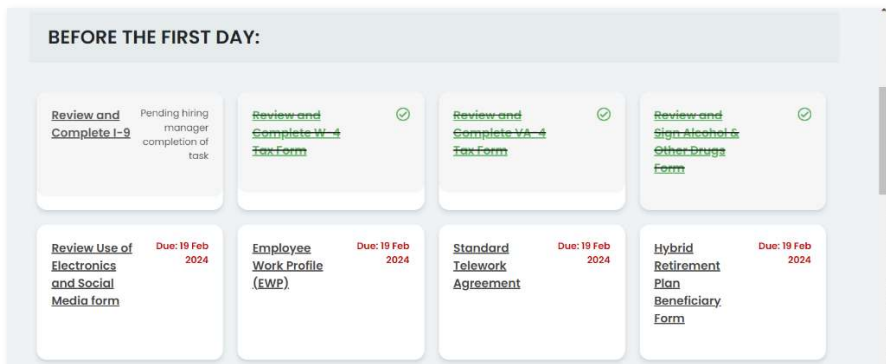
When the applicant receives the offer email from the PageUp system, they are prompted to login to their applicant portal to view the offer. Below is a screenshot of what the applicant will see.



Once the offer is accepted, the applicant will gain access to the New Hire Form and the Onboarding portal.



The new hire will see a list of tasks which are grouped by the time frame in which the tasks need to be completed. Once completed, the task will show as a completed task on the Onboarding Manager and Onboarding Delegate's new hire dashboard.



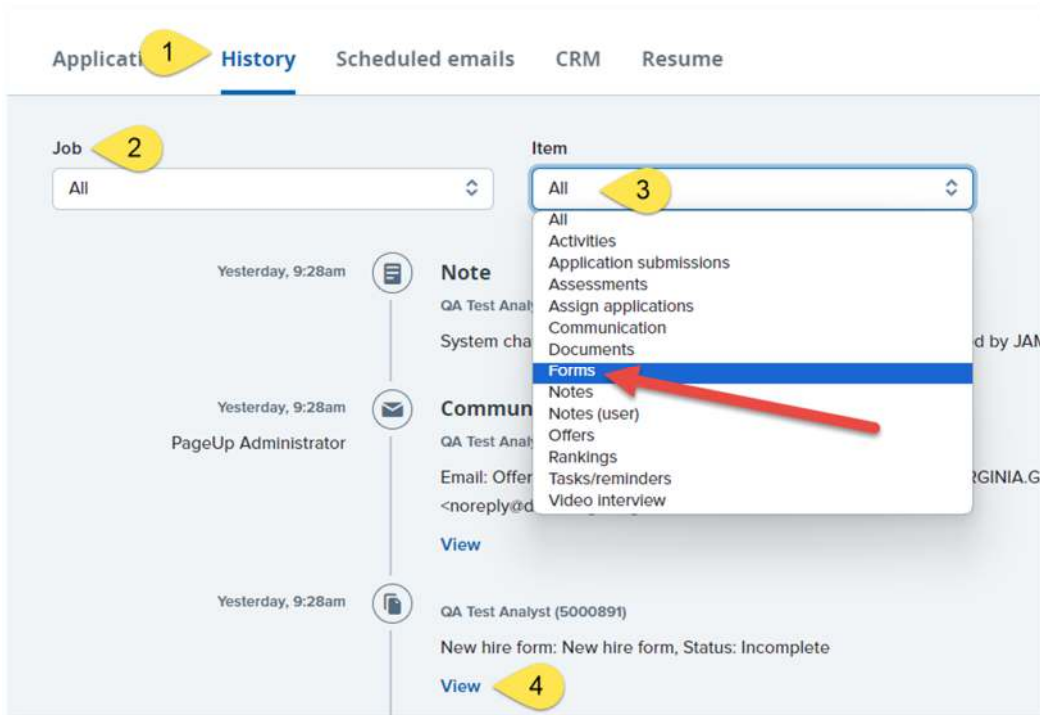
Recruiter / Hiring Manager View

New Hire Form

The completed new hire form is accessed through the applicant card in the history tab. Due to the sensitive information on the New Hire Form only those members in charge of onboarding will have complete access.

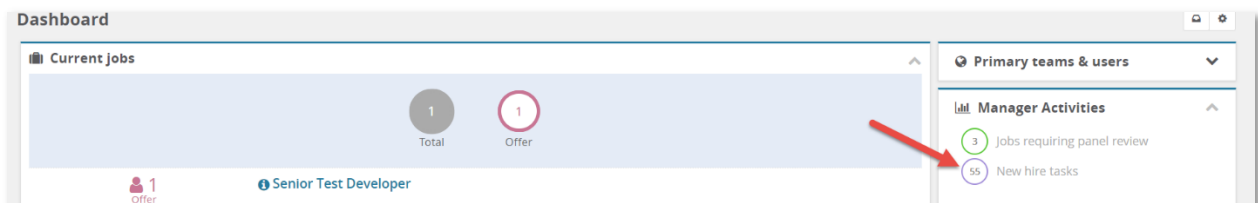
From the list of applicants select the applicant you wish to view to open the applicant card.

1. Select the “History” tab.
2. Select the job the applicant applied for from *Job* dropdown.
3. Under items, select “Forms”.
4. Under “New hire form” select **View**.



New Hire Tasks

On the Recruiter Dashboard under Manager Activities, the “New hire tasks” item can be selected to view assigned or completed onboarding tasks that have been done by the new employee and/or manager.



In the “My new hire tasks” window you can:

1. Choose specific employee(s)
and/or
2. Select specific tasks.

My new hire tasks

Employee: **1**

Task: **2**

Bobby Blair
 Jamie Norman

Assign Mentor
 Assign Workspace
 Celebrate Employee's One Year Anniversary

Select	Title	Employee	BadgeID	Step di	Hiring mana	Job	Start date	
<input type="checkbox"/>	HR - Complete New Hire Forms	Bobby Blair		Apr 18, 2024	Jason Recruiter	Operations manager	Apr 25, 2024	View all tasks
<input type="checkbox"/>	HR - Request Employee Badge	Bobby Blair		Apr 18, 2024	Jason Recruiter	Operations manager	Apr 25, 2024	View all tasks
<input type="checkbox"/>	HR - Request Employee Parking Pass	Bobby Blair		Apr 18, 2024	Jason Recruiter	Operations manager	Apr 25, 2024	View all tasks

Filtering by task can be an easy way to review whether a task is complete.

Once your selections are complete, click **Search** to view the results.

Click **View all tasks** to see a complete listing of tasks per employee.

Manage task screen options

1. Review all tasks.
2. Add new task.
3. Notify employee of updates.
4. Edit a task.
5. Delete a task.
6. Add optional task.

New hire tasks

Bobby Blair
Position: Operations manager
Start date: Apr 25, 2024

2

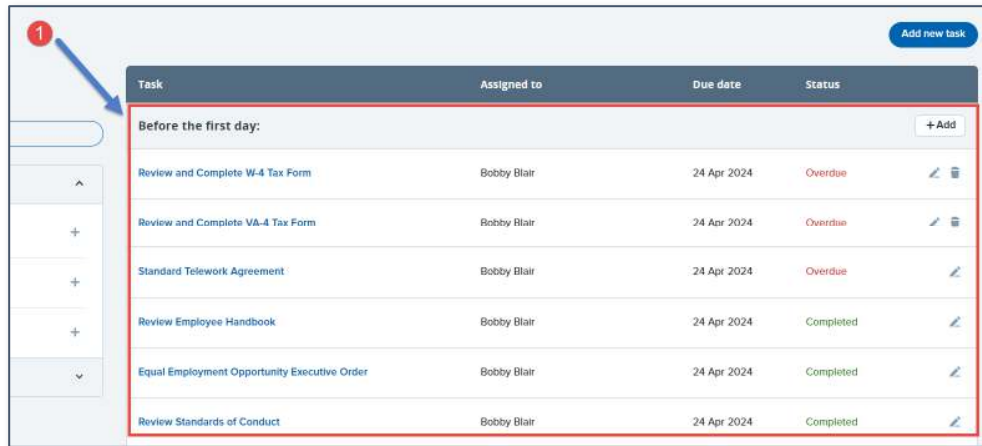
3

6

Task	Assigned to	Due date	Status	
Before the first day: <input type="button" value="+ Add"/>				
Review and Complete W-4 Tax Form	Bobby Blair	24 Apr 2024	Overdue	<input type="button" value="edit"/> <input type="button" value="delete"/>
Review and Complete VA-4 Tax Form	Bobby Blair	24 Apr 2024	Overdue	<input type="button" value="edit"/> <input type="button" value="delete"/>
Standard Timecard Agreement	Bobby Blair	24 Apr 2024	Overdue	<input type="button" value="edit"/> <input type="button" value="delete"/>
Review Employee Handbook	Bobby Blair	24 Apr 2024	Completed	<input type="button" value="edit"/> <input type="button" value="delete"/> 5
Equal Employment Opportunity Executive Order	Bobby Blair	24 Apr 2024	Completed	<input type="button" value="edit"/> <input type="button" value="delete"/> 4
Review Standards of Conduct	Bobby Blair	24 Apr 2024	Completed	<input type="button" value="edit"/> <input type="button" value="delete"/>

Review Tasks

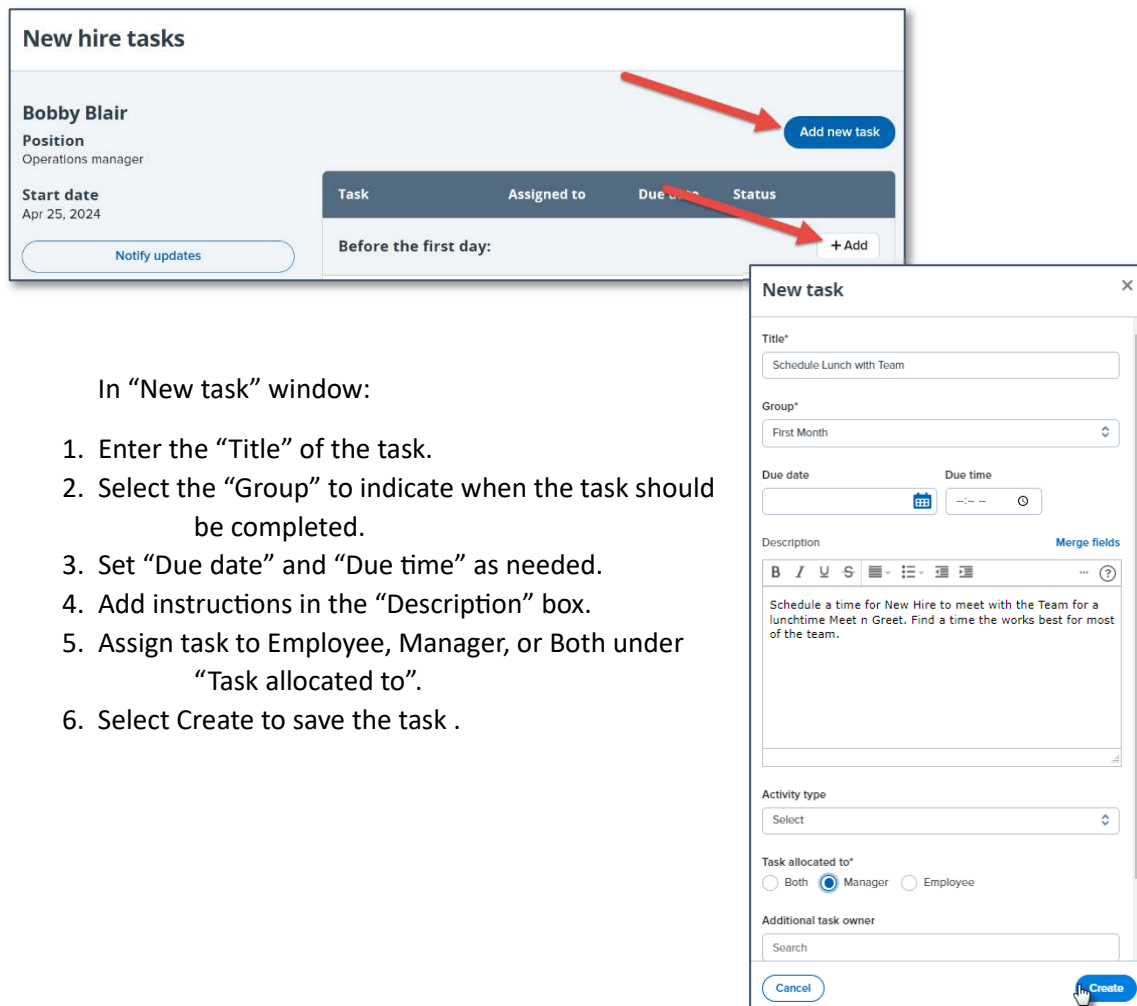
The task list begins with items in the *Before the first day* group and ends with the completion of the *First Year* group. In this task window you can see each task group, who it's assigned to, the due date (if applicable), and status. Scroll down or up to see all the tasks listed.



Task	Assigned to	Due date	Status
Before the first day: +Add			
Review and Complete W-4 Tax Form	Bobby Blair	24 Apr 2024	Overdue
Review and Complete VA-4 Tax Form	Bobby Blair	24 Apr 2024	Overdue
Standard Telework Agreement	Bobby Blair	24 Apr 2024	Overdue
Review Employee Handbook	Bobby Blair	24 Apr 2024	Completed
Equal Employment Opportunity Executive Order	Bobby Blair	24 Apr 2024	Completed
Review Standards of Conduct	Bobby Blair	24 Apr 2024	Completed

Add New Tasks

When the **Add new task** button or **Add** is selected, a “New task” pop-up window appears.



New hire tasks

Bobby Blair
Position
Operations manager

Start date
Apr 25, 2024

Notify updates

Task	Assigned to	Due date	Status
Before the first day: +Add			

New task

Title*
Schedule Lunch with Team

Group*
First Month

Due date
Due time

Description
Merge fields
Schedule a time for New Hire to meet with the Team for a lunchtime Meet n Greet. Find a time the works best for most of the team.

Activity type
Select

Task allocated to*
 Both Manager Employee

Additional task owner
Search

Cancel Create

In “New task” window:

1. Enter the “Title” of the task.
2. Select the “Group” to indicate when the task should be completed.
3. Set “Due date” and “Due time” as needed.
4. Add instructions in the “Description” box.
5. Assign task to Employee, Manager, or Both under “Task allocated to”.
6. Select Create to save the task .

Notify employee of updates

To inform new hire of added tasks or updates select **Notify updates**.

New hire tasks

Bobby Blair
Position
Operations manager

Start date
Apr 25, 2024

Notify updates

Add optional tasks ^

- Complete Probationary Review +
- Upload Document +
- HR - Follow Up with Supervisor +

My Favorite Tasks v

Task
Before
Review
Review
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Review
Equal E

Once selected the user will be prompted to send the below email. Update email as needed and send.

Email employee X

From*
PONNETTE.SMITH@DHRM.VIRGINIA.GOV

Subject*
Onboarding task updated

Message* Merge fields

B I U S [List Icons] [Link Icon] [Help Icon]

Dear JAMIE,

This is a notification to advise that some updates have been made to your onboarding task list.

Please login [HERE](#) to review the updates.

Regards,
Jason Recruiter

Cancel Send

Edit Task

When the pencil icon on a task row is selected, an “Edit task” pop-up window appears.

Review and Complete VA-4 Tax Form	Bobby Blair	24 Apr 2024	Overdue	 
Standard Telework Agreement	Bobby Blair	24 Apr 2024	Overdue	
Review Employee Handbook	Bobby Blair	24 Apr 2024	Completed	
Equal Employment Opportunity Executive Order	Bobby Blair	24 Apr 2024	Completed	
Review Standards of Conduct	Bobby Blair	24 Apr 2024	Completed	

Edit task fields in the task editing window. Select **Update** once completed.

Edit task

Title*
Review and Complete W-4 Tax Form

Group*
Before the first day:

Due date
Feb 19, 2024

Due time
--:-- --

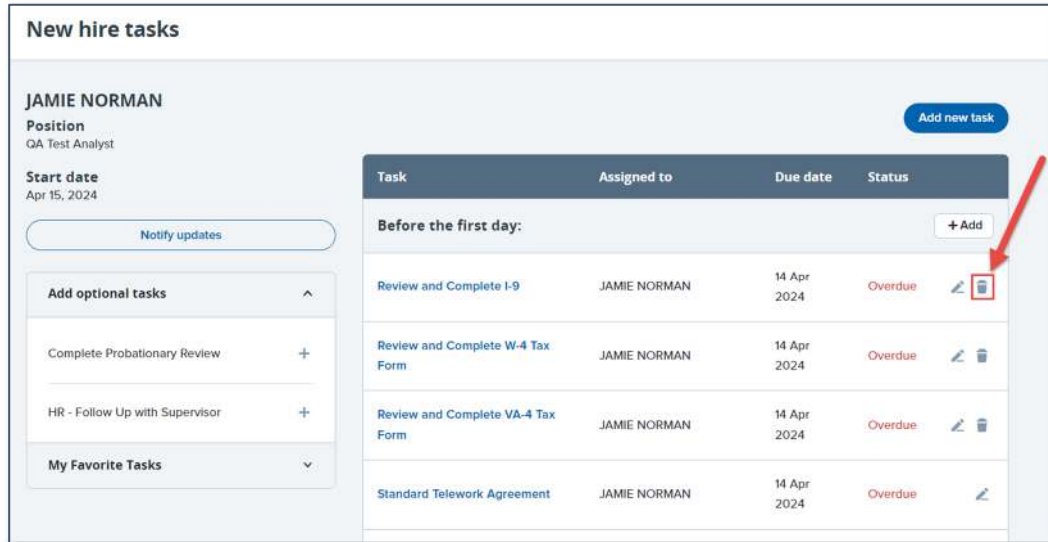
Description
Review and Complete [W-4 Tax Form](#)

Cancel Update

Delete Task

Delete a task by selecting the trash can icon on the task item, if applicable.

If the trash can icon is not available, edit the task and move it to the “Not applicable” group. This will remove it from main task groups.



New hire tasks

JAMIE NORMAN
Position
QA Test Analyst
Start date
Apr 15, 2024

Notify updates

Add optional tasks

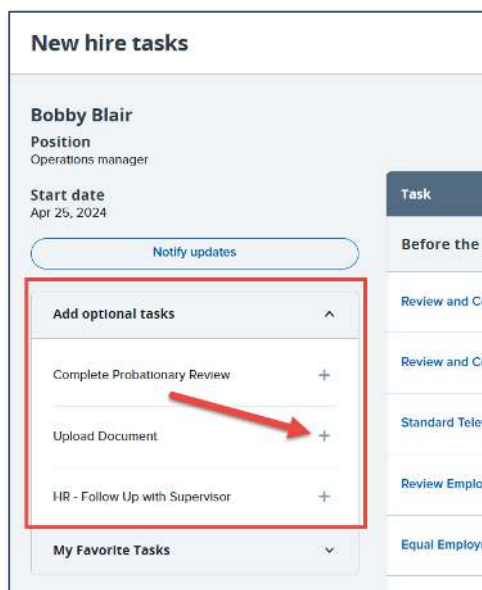
- Complete Probationary Review +
- HR - Follow Up with Supervisor +
- My Favorite Tasks v

Task	Assigned to	Due date	Status
Before the first day: + Add			
Review and Complete I-9	JAMIE NORMAN	14 Apr 2024	Overdue
Review and Complete W-4 Tax Form	JAMIE NORMAN	14 Apr 2024	Overdue
Review and Complete VA-4 Tax Form	JAMIE NORMAN	14 Apr 2024	Overdue
Standard Telework Agreement	JAMIE NORMAN	14 Apr 2024	Overdue

Add Optional Task(s)

Optional tasks in the left task box can be added by selecting the plus (+) sign next to the appropriate task. Like the “Add new task” action, an editing pop-up window appears where the details of the task can be defined before saving to the task list.

Note: The “Upload Document” task can be used to create a task that will allow for the upload of a single document. This is utilized as an option which provides the ability to a upload document of choice.



New hire tasks

Bobby Blair
Position
Operations manager
Start date
Apr 25, 2024

Notify updates

Add optional tasks

- Complete Probationary Review +
- Upload Document +
- HR - Follow Up with Supervisor +
- My Favorite Tasks v

Task
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Managing Tasks in New Hire Task View

As tasks are completed by the new employee and/or manager, the task list will reflect this in the *Status* column. “Completed” will show in green and “Overdue” tasks appears in red on the dashboard.

Note: Always verify the completion of all tasks for accuracy.

New hire tasks

Bobby Blair
Position
Operations manager

Start date
Apr 25, 2024

Notify updates

Add new task

Task	Assigned to	Due date	Status	
Before the first day:				+ Add
Review and Complete W-4 Tax Form	Bobby Blair	24 Apr 2024	Overdue	✎ 🗑
Review and Complete VA-4 Tax Form	Bobby Blair	24 Apr 2024	Overdue	✎ 🗑
Standard Telework Agreement	Bobby Blair	24 Apr 2024	Overdue	✎
Review Employee Handbook	Bobby Blair	24 Apr 2024	Completed	✎
Equal Employment Opportunity Executive Order	Bobby Blair	24 Apr 2024	Completed	✎
Review Standards of Conduct	Bobby Blair	24 Apr 2024	Completed	✎

Add optional tasks

- Complete Probationary Review +
- Upload Document +
- HR - Follow Up with Supervisor +

My Favorite Tasks