

## SUPERVISOR / ADMIN ASSISTANT PEOPLEADMIN ONBOARD GUIDE

**INTRODUCTION:** Human Resources has implemented a PeopleAdmin module for New Hire Onboarding (onboarding = orientation). Onboard is tied to PeopleAdmin Recruiting and manages the “post hire” phase for new hire paperwork and orientation tasks for ALL College employees as well as assigning supervisors various tasks to ensure their new employees get off to a good start. See the section below on “Terms to Understand” for more contextual information.

### GETTING STARTED:

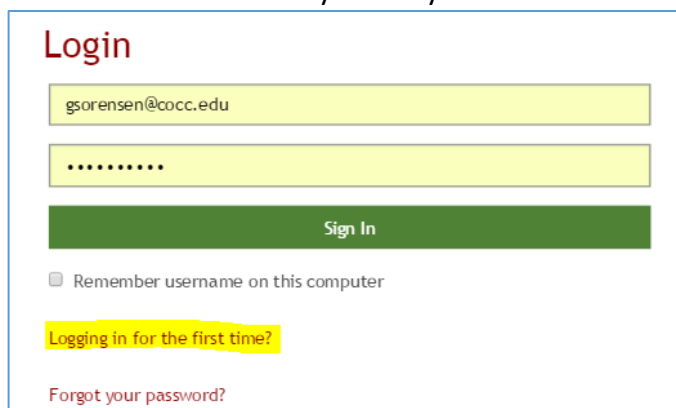
1. In either Internet Explorer (IE) or Google Chrome, open the Onboard Application **from the COCC Employee Login Page**



This link will open the Onboard page that contains basic information about the application and has links to all current **help documents**. From this page, click the **PeopleAdmin HR Onboard** button.

You may want to add the direct login page to your Favorites/Bookmark for quick access in the future (<https://cocc.ted.peopleadmin.com/records>).

2. **On the Login page:** Your username = your **COCC email** (Note: if you were hired at COCC after July 15, 2016 your username may be your personal email carried from your application. You may ask HR to change this to your COCC email; you can only change your password).
3. To create a password when logging in for the **first time**, click on the “Logging in for the first time” link. It is recommended that you use your COCC or existing PeopleAdmin password for simplicity.



Your security permissions are set according to your position. If you feel you don't have the correct permissions, contact Human Resources.

## Table of Contents

TERMS TO UNDERSTAND .....	3
INSTRUCTIONS PRESENTED TO NEW HIRE AS FIRST TASK ON USING THE PROGRAM .....	4
UNDERSTANDING YOUR HOME PAGE .....	5
PROCESS WHEN EMPLOYEES WORKING IN MORE THAN ONE DEPARTMENT .....	8
MODIFYING A CHECKLIST .....	9
TRACKING NEW HIRE PROGRESS AND REPORTING .....	10
PRINTING OPTIONS .....	13
Q & A –HR HIRING PROCESSES RELATED TO ONBOARD .....	14

## TERMS TO UNDERSTAND

**CHECKLIST:** A checklist is a set of tasks to be completed by a new hire. Checklists are specific to each Employee Type (Classified, Administrative, FT Faculty, PT Faculty, Adjunct Faculty, ABS instructors, Federal Work Study, Irregular Wage, Continuing Education). Human Resources will assign the applicable checklists. Supervisors will be given permission to modify already assigned department level checklists.

Each new hire will be assigned 2 or 3 checklists depending on the department:

- **WELCOME checklist** is assigned when the hiring proposal is approved. This checklist is intended to manage initial time sensitive new hire forms (I-9, W-4, Payroll) AND to provide supervisors with a list of tasks to set the new hire up before their start date. HR will assign the appropriate Standard list based on employee type.
- **ORIENTATION checklist(s)** are assigned after the Employee has completed their Welcome tasks. This list includes both new hire and supervisor tasks. Departments may choose to have a customized department level Orientation list to be assigned in addition to the HR Standard orientation list. Employees are not expected to work on these tasks until they start working. Supervisors will be reminded to schedule time for their employees to complete the orientation tasks which will take approximately 3-5 hours depending on employee type and department level tasks.

**TASKS:** Each new hire will have a “My Tasks” list when a checklist is assigned. Generally, new hires are expected to complete their Orientation tasks within two weeks of starting. Supervisors or others that get routed forms in workflow will also have their own task list. Supervisors will have tasks related to setting up new hires before they arrive and for covering designated topics with new hires when they start work.

Incomplete tasks are on the **NEEDS ATTENTION** tab. As tasks are completed, they are moved to the **COMPLETED** tab where they can always be re-accessed. See later sections of this document for more detail on managing tasks.

The screenshot shows a web interface titled "MY TASKS". At the top, there are two tabs: "Needs Attention" (highlighted in red) and "Completed" (highlighted in green). Below the tabs, it says "You have 26 tasks." There is a search bar with a magnifying glass icon. Below the search bar, there is a section titled "ALL TASKS" with a "Bulk Actions:" dropdown menu and a "GO" button. The main content is a table with the following columns: TASK, RELATED STAFF, CHECKLIST, and DUE DATE. Each row has a "VIEW" button on the right.

TASK	RELATED STAFF	CHECKLIST	DUE DATE	
3-Complete Vehicle Registration Form	Gail Sorensen	STANDARD Faculty FULL-TIME Checklist	07/17/2016	VIEW
3-Access your Bobcat Account & Learn about WebTime Entry	Gail Sorensen	STANDARD Faculty FULL-TIME Checklist	07/17/2016	VIEW
3-Learn About Payroll Resources	Gail Sorensen	STANDARD Faculty FULL-TIME Checklist	07/17/2016	VIEW
4-Learn about your Benefits Package	Gail Sorensen	STANDARD Faculty FULL-TIME Checklist	07/17/2016	VIEW

**WORKFLOW:** Some tasks (typically those that are forms) are routed to other staff members for approval, review (FYI), or processing in the system. For example, Vehicle Registration Forms are routed to CPS for processing. Even though you may not be a Supervisor, you may be a user that has a task list because you are routed forms for processing.

**SEE Q&A SECTION AT THE END OF THIS DOCUMENT FOR GENERAL QUESTIONS ABOUT BOTH THE ONBOARD APPLICATION AND GENERAL HR HIRING PROCESSES.  
THIS Q&A SECTION IS THE SAME AS THE STAND-ALONE Q&A FOR STAFF DOCUMENT**

## INSTRUCTIONS PRESENTED TO NEW HIRE AS FIRST TASK ON USING THE PROGRAM

Below are the instructions presented to New Hires as their first task in the Welcome Checklist so they have some guidance in completing tasks and what they will see. This should also be helpful for other users of the application (Supervisors; Dept Admins) so it's included here. (the **faculty** version is slightly different)

Congratulations on joining the COCC team and welcome to COCC Onboard. You will use the Onboard software to complete required tasks as a new College employee. Some tasks have forms for you to complete and submit, others are to acknowledge policies or complete trainings, and some are just to teach you about College resources and benefits.

Following the completion of this WELCOME checklist, you will have two weeks from your start date to complete the ORIENTATION checklist. Your supervisor will give you time to complete your tasks during your work hours. Your department may have added additional tasks to your list so work with your supervisor if you have questions on those items.

Here are some tips about getting through the tasks:

1. Any task that is a FORM to be completed will pre-populate the majority of your personal information. If you see any information that is incorrect, please contact Human Resources BEFORE moving forward, so your information is correct for the remaining forms.
2. If you see a red asterisk (\*) by a form field, it is a REQUIRED field.
3. If the form contains a DATE FIELD, use the pop-up calendar or make sure you follow the mm/dd/yyyy format or the date will not be saved.
4. FORMS submitted may be RETURNED to you if the receiver of the form needs something corrected. You will receive an email notification and the task will reappear on your task list for you to make the corrections noted in the comments box and resubmit.
5. On each task, make sure to SCROLL COMPLETELY TO THE BOTTOM for instructions and options. You will see buttons to "save draft" and "save final". The task is not considered complete until you choose "save final" but be aware that once you submit as final, you cannot return to make edits so be careful. You also have the option to print the form – use the PDF version to keep to one page.
6. Tasks that REQUIRE A SIGNATURE will have 2 steps (bottom of form); FIRST, save the form using "save final" (as directed) to lock the form and move to the NEXT step where you will actually type your name and submit your signature. Note that the CHECKBOX with the link that appears on the first screen does NOT get checked and is grayed out. You will check this box on the second screen where you type your name.
7. Tasks that have a checkbox on the task name line and have a button "MARK AS DONE" do NOT need to be opened; there is nothing to view or complete. If you have completed the task, simply press the Mark as Done button.
8. When checklists are originally assigned, tasks are listed in priority order to complete, but you may resort your task list by clicking on any of the column headers. You will notice a number in front of each task which is intended to keep your tasks in a logical grouping and priority if you sort the list by task name (ascending). You may have up to three assigned lists which are all combined (Welcome, Standard Orientation, and Department Orientation). You can also sort by Checklist Name to show this organization.

We understand there are quite a few tasks to complete; depending on your employee classification and your department, the orientation may take 4-5 hours to work through, with faculty taking 2-4 additional hours. Refer to the due date next to the tasks for the expected completion date. Different lists may have different due dates and may go beyond the standard two week expectation of completion.

We appreciate your attention in reviewing the information presented.

## UNDERSTANDING YOUR HOME PAGE

If you **supervise** staff, your direct reports will appear listed to the left. If you are an **administrative assistant**, you will also see “direct reports” because you will have the same view as the supervisor so you can assist with task completion.

NOTE: As a true Supervisor you will see your direct reports from when staff data was initially imported. As an Assistant with Supervisor view, you may not see any staff listed to the left initially, but as people are hired and added to Onboard, you will be added as a dual supervisor and their names will appear. (basically, you don’t have “history”, just the future).

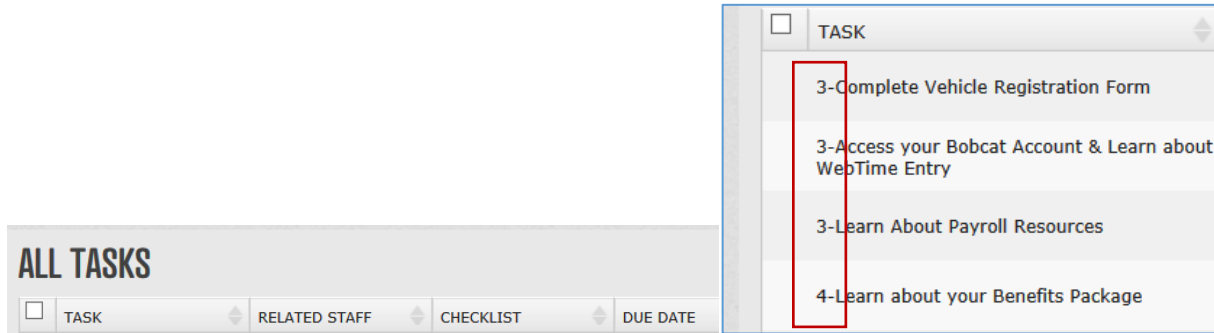
On the main part of the screen, you will see your “**MY TASKS**” list. These “Needs Attention” tasks may have been directly assigned to you to complete or they may have been routed to you from the new hire as a reviewing/approving authority. In either case, the button on the task line will indicate the action required (Mark as Done or Sign/App/Rev or View). As a supervisor, most of your tasks will be the simple checkbox to mark completed (Mark as Done) – these are reminders for you to complete tasks either before your new hire arrives (Welcome List), or once your new hire starts (Orientation List).

The screenshot shows the 'MY TASKS' interface. On the left is a 'STAFF LIST' for 'MINNIE MOUSE' with details: Employee ID 123456666, Job Type A1, Location Not Used. The main area has a 'MY TASKS' header with 'Needs Attention' and 'Completed' tabs. Below the tabs, it says 'You have 8 tasks.' and has a search bar. Underneath is an 'ALL TASKS' table with columns: TASK, RELATED STAFF, CHECKLIST, DUE DATE, and a 'Bulk Actions' dropdown. The table lists four tasks, all assigned to 'Minnie Mouse' with a due date of '11/21/2016'. The first three tasks have 'MARK AS DONE' buttons, and the last one has a 'VIEW' button.

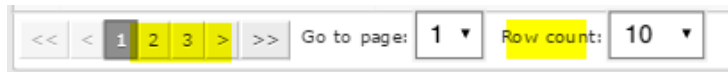
TASK	RELATED STAFF	CHECKLIST	DUE DATE	
<input type="checkbox"/> 4-Request Employee Equipment (if applicable to job duties)	Minnie Mouse	STANDARD I.W. / F.W.S WELCOME	11/21/2016	MARK AS DONE
<input type="checkbox"/> 3-Request Banner Access (MSTR and PREP)	Minnie Mouse	STANDARD I.W. / F.W.S WELCOME	11/21/2016	MARK AS DONE
<input type="checkbox"/> 5-REMINDER: Send new hire to HR for 1-9 completion 1st Day	Minnie Mouse	STANDARD I.W. / F.W.S WELCOME	11/21/2016	MARK AS DONE
<input type="checkbox"/> 3-Request Copier Access-Copy Center Form	Minnie Mouse	STANDARD I.W. / F.W.S WELCOME	11/21/2016	VIEW

- Once tasks are completed, they are moved to the “Completed” tab where you can always pull them up again if needed.
- To **SEARCH** for a specific task, use the search field above the task list.
- To **SORT** lists, click on the header bar for the column you want to sort by. (*Unfortunately, the current functionality will refresh your screen when you complete a task and put the list back in default sort order if even though you changed it.*)
- Note that **DUE DATES** apply to the entire checklist that was assigned (not separate dates for individual tasks) and these are directed at the new hire, not the supervisor. For example, when you see a task to request Banner access, the due date might be just a few days away, but the date really applies to the new hire’s tasks (which are not shown on your list) because they have time-sensitive tasks. *Currently there is no way around this due date point of confusion. On a form that is forwarded to you for approval, there will be no due date at all.*

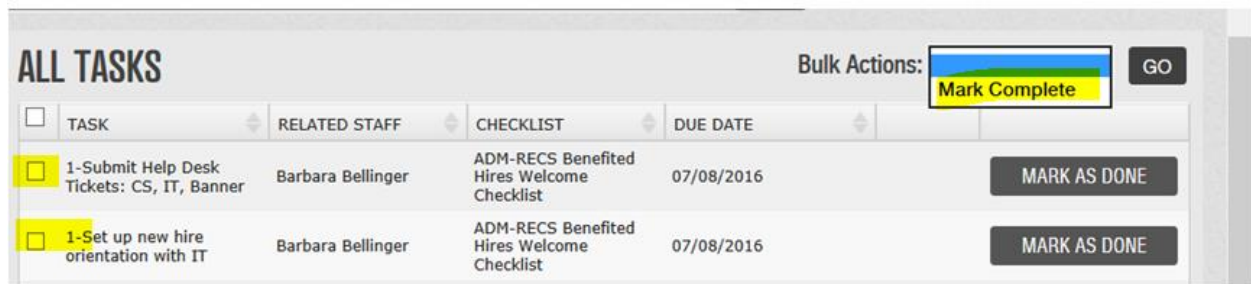
- You will see that a **number is next to most tasks** (4-learn about.....); this number assists with keeping related tasks together and in a logical priority order upon initial assignment and when sorting by Task.



- To **reset your ROW COUNT** when you have multiple pages, use the Row Count options (i.e. if you want to view all records on one page and scroll).

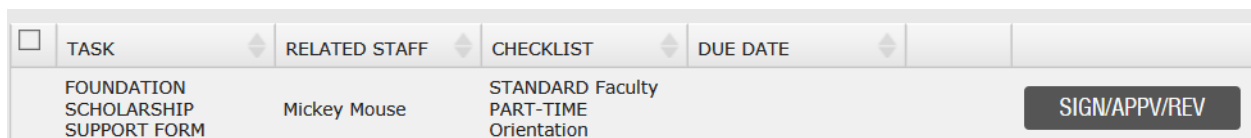


- To **complete more than one "checkbox" task in one action**, use the **BULK ACTIONS** option. Check the box next to the tasks to select those to mark as done. Then select **'Mark Complete'** from the Bulk Actions drop-down and click **GO**. Note that this is only available for "checkbox/Mark as Done" tasks. This may come in handy if you have some tasks that might not apply to a particular new hire because of their specific job description.



### RETURNING FORMS FOR CORRECTION:

- If a task is **ROUTED TO YOU in workflow because you are the APPROVER**. This is how you can handle the form. As an Approver you have permission to return the form to the employee for corrections.



Click on the SIGN/APPV/REV button to open the form.

If you need to return the form, type in why you are returning it to give direction to the employee. Then click the **REVISION REQUESTED** button.

**APPROVE**

Current User  
Gail Sorensen

Date  
9/16/2016

Comments

**CLOSE** **PRINT** **PRINT AS PDF** **REVISION REQUESTED** **APPROVE**

The task/form will be removed from your “Needs Attention” list and added back to the employee’s task list.

The employee will see your comments in the workflow section of the form:

<b>Completed</b>	1	Signed by Mickey Mouse on 09/16/2016 at 01:13 PM <b>Signature:</b> mickey mouse <b>Comments:</b> can you see my mouse comments?
<b>Revision Req.</b>	2	Sub-Workflow Step Completed <b>Comments:</b> you forgot all of the important fields!

If the employee leaves you a comment on resubmission you will see it in the workflow area:

<b>Completed</b>	1	Signed by Mickey Mouse on 09/16/2016 at 01:21 PM <b>Signature:</b> mickey mouse <b>Comments:</b> oops, sorry. done now
------------------	---	--

To approve the submission, click the **APPROVE** button. Note you can Print the form out first if you need to. See notes about the print options further down in this document.

**CLOSE** **PRINT** **PRINT AS PDF** **REVISION REQUESTED** **APPROVE**

## PROCESS WHEN EMPLOYEES WORKING IN MORE THAN ONE DEPARTMENT

When an individual is newly hired (first time at COCC), they will receive the Standard Welcome and Orientation list based on their employee type (irregular wage, work study, etc). If the first hiring department has a custom department orientation, it will be assigned with the standard orientation.

When a second department hires the same employee (sharing the EE at the same time):

- (A) Typical scenario: an irregular wage hire is working in multiple departments. In this case, HR will only assign the department level checklist (if there is one) at the time of the 2<sup>nd</sup> hire because the employee type is the same. Supervisors/admin assistants get any supervisor tasks on these lists as well as the email notifications.
  
- (B) Less typical scenario: the first hire was an irregular wage for the Tutoring center and the 2<sup>nd</sup> hire was a PT Instructor for the Math department. HR will determine if any “standard” items need to be added if they were not handled in the first hire because these are not same/similar employee types (for example, HR may add certain standard PT Instructor orientation tasks). HR will also assign the department level checklist (if there is one). Supervisors/admin assistants get any supervisor tasks on these lists as well as the email notifications.

Below is an example of the most typical scenario:

Irregular wage hire gets hired first by the Bookstore, then is later hired by the ITS computer lab, so when they are hired into the computer lab as the second hire, the ITS department list is assigned. Now supervisor/admin assistants in both departments see the new tasks. As the bookstore supervisor, you know you can ignore the tasks belonging to the ITS department based on the name of task and the checklist name.

Please do NOT close out tasks that don't belong to you. While we understand this is not ideal, there is no alternative method to handle employees working in multiple departments. If either department doesn't have a customized orientation, then you won't see additional tasks so this situation may not arise all that often.

ALL TASKS			
<input type="checkbox"/>	TASK	RELATED STAFF	CHECKLIST
<input type="checkbox"/>	3-ITS-Students needing Proxy Cards to Campus Services	Minnie Mouse	ITS Comp Lab Dept Orientation
<input type="checkbox"/>	3-ITS-Add to Computer Lab Team Site and Blackboard	Minnie Mouse	ITS Comp Lab Dept Orientation
<input type="checkbox"/>	3-ITS-Computer Lab ID, T-shirt, & Lab Vest from Supervisor	Minnie Mouse	ITS Comp Lab Dept Orientation
<input type="checkbox"/>	3-Bookstore-Enter new staff information into POS Server	Minnie Mouse	BOOKSTORE I.W. / F.W.S Orientation
<input type="checkbox"/>	3-Bookstore-Get student class schedule	Minnie Mouse	BOOKSTORE I.W. / F.W.S Orientation



## MODIFYING A CHECKLIST

If your security settings allow you to view assigned checklists, then you can also modify them to match the particular job of the new hire (Department specific checklists only). For example, if your **department** list has tasks for all possible positions in the department and there is some difference in orientation requirements for certain positions, you can **IGNORE** those tasks that don't apply to that position.

If you do not see **IGNORE** by the task, then it is considered mandatory (by HR or your Dept) and cannot be removed. However, for your department lists, there should be no mandatory tasks.

**To modify a checklist**, click on the staff member's name in the staff list to open their record (or search to locate them and open). You will see all checklists that have been assigned. Click on your department checklist icon/box to open the list to modify. Click **IGNORE** if you want to remove the task. Once Ignored, you still have the ability to *Restore* it if you need to. This example shows the Admissions office custom checklist.

The screenshot shows a user interface for Mickey Mouse. On the left, there are two sidebar buttons: 'ASSIGN CHECKLIST' and 'ADMISSIONS BENEFITED ORIENTATION Checklist'. The main area is titled 'MICKEY MOUSE' and 'ADMISSIONS BENEFITED ORIENTATION CHECKLIST (0%)'. Below this is a table with columns for 'TASK', 'RESPONSIBLE', and 'STATUS'. The table contains four rows of tasks, each with an 'IGNORE' button. The first row's 'IGNORE' button is highlighted in yellow.

TASK	RESPONSIBLE	STATUS
<input type="checkbox"/> 9-Review Department Mission / Assessment Plan	Mickey Mouse	IGNORE
<input type="checkbox"/> 9-Review Enrollment Services Employee Manual	Mickey Mouse	IGNORE
<input type="checkbox"/> 9-Complete Driving Permission Form	Mickey Mouse	IGNORE
<input type="checkbox"/> 9-Complete Driving Approval Form	Mickey Mouse	IGNORE

A close-up of a task row from the table above. The task is '9-Complete Driving Approval Form' assigned to 'Mickey Mouse'. The 'STATUS' column contains a 'RESTORE' button.

<input type="checkbox"/> 9-Complete Driving Approval Form	Mickey Mouse	RESTORE
---	--------------	---------

*example of ignored task*

## TRACKING NEW HIRE PROGRESS AND REPORTING

### OPTION 1: CHECK PROGRESS FROM EMPLOYEE RECORD (Single Employee):

If you are just tracking one new hire, you may prefer to just look up their status from their staff record. Locate their record from the left area of the screen under the Staff List. Select the employee (click on their name) and you will see the assigned checklists. Click on the checklist you want to review and the progress screen will open showing the % complete and which tasks have been completed.

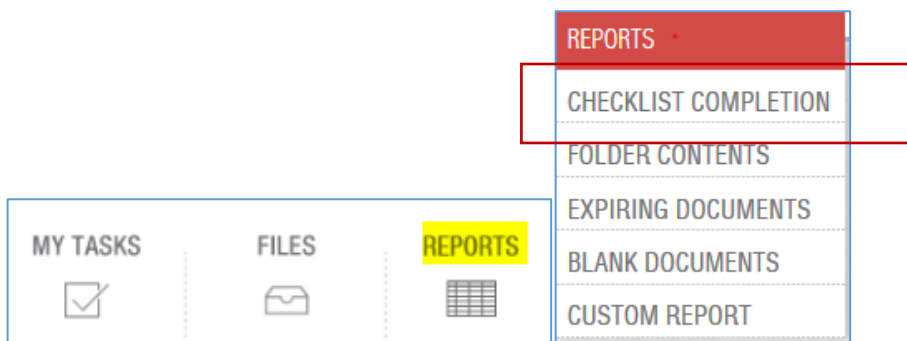
This example is showing the Standard Administrator list; 14% completed. Completed tasks show a check inside the checkbox and the Status shows as “Filed”. You will see the task assignment in the RESPONSIBLE column so note that not all tasks are assigned to the new hire.

Note that from this view, you cannot send the employee a reminder from within the Onboard system. See the instructions from the Reports area for more options.

TASK		RESPONSIBLE	STATUS
<input type="checkbox"/>	3-Complete Vehicle Registration Form	IGNORE Mickey Mouse	
<input checked="" type="checkbox"/>	3-Access your Bobcat Account & Learn about WebTime Entry	Mickey Mouse	Filed
<input checked="" type="checkbox"/>	3-Learn About Payroll Resources	Mickey Mouse	Filed
<input checked="" type="checkbox"/>	4-Learn about your Benefits Package	Mickey Mouse	Filed
<input type="checkbox"/>	4-Complete Benefits Enrollment - OEBC Guide & Enroll Site	Mickey Mouse	
<input type="checkbox"/>	4-Complete PERS Beneficiary Form	IGNORE Mickey Mouse	
<input type="checkbox"/>	4-Option to Enroll in Flex spending account (FSA)	IGNORE Mickey Mouse	

### OPTION 2: CHECK PROGRESS FROM REPORTS (1 or more employees):

To check multiple new hires, use the Reporting option rather than looking up individual records. The Reports area also gives you the ability to send reminders. Select the **REPORTS** option on the home page. If you don't see this option on your menu, contact HR as this is related to your security permissions. This area has both standard reports and the ability to create customized reports. Depending on your permissions, you may not see all report options.



The **CHECKLIST COMPLETION Report** is the most widely used by both HR and Supervisors to track the progress of each new hire. If the Supervisor has as staff view on just their “Direct Reports” than they will only see those employees listed. For HR or anyone else with a “all staff view” they will see all employees assigned to a particular checklist and you will most likely want to use the Filter or search options.

The **Checklist Completion Report is set up by checklist** so you need to select a checklist first. This means that you will see all employees that have been assigned that list to see their progress. *NOTE: you will see this in the drop-down list first –*



*since the system immediately loads the first report listed we put an “empty” checklist as the default to avoid the longer load time of a list with data. You will see a “loading..” message and it may take several seconds to clear before you can select the list you want.*

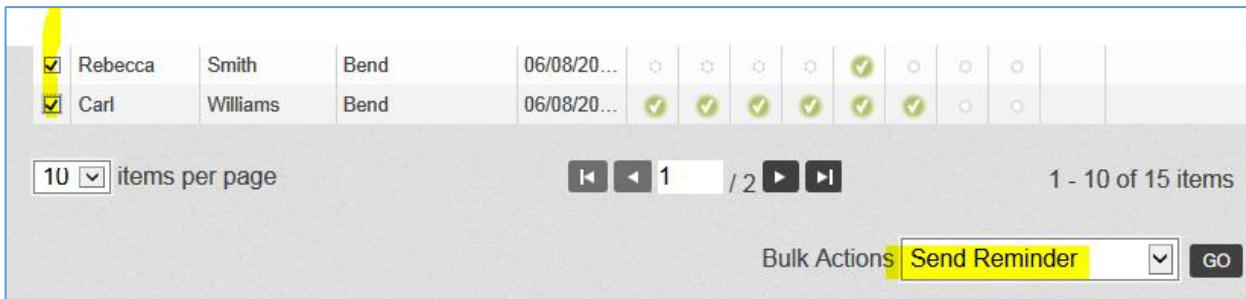
The different symbols under each task show the status (completed, in progress, not started etc). Note that all reports have an EXPORT option to export into Excel.

<input type="checkbox"/>	First	Last	Location	Assigne...	3-Complete Vehicle Registration F...	3-Notification of union dues & Opt...	7-Option to Enroll - Support COC...	4-Complete PERS Beneficiary For...	7-Review COCC Strategic Plan (mi...	6-Acknowledge Information Confi...	4-Option to Enroll in Medical Leav...	4-Option to Enroll in Flex spendin...	4-Option to Enroll in Health Savin...	6-Acknowled...
<input type="checkbox"/>	HR	Admin	Example Location	05/20/20...	✓	○	✓	○	○	○	○	○	○	○
<input type="checkbox"/>	Jan	Hansen	Bend	05/24/20...	○	○	○	○	✓	○	○	○	○	○
<input type="checkbox"/>	Jennifer	Shew	Bend	05/25/20...	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
<input type="checkbox"/>	Christa	Gunnell	Bend	05/24/20...	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓

At the **bottom of the screen** you have some options, including sending a **Reminder** to the new hire if they are behind on completing their tasks.

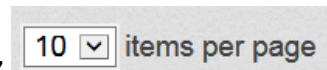
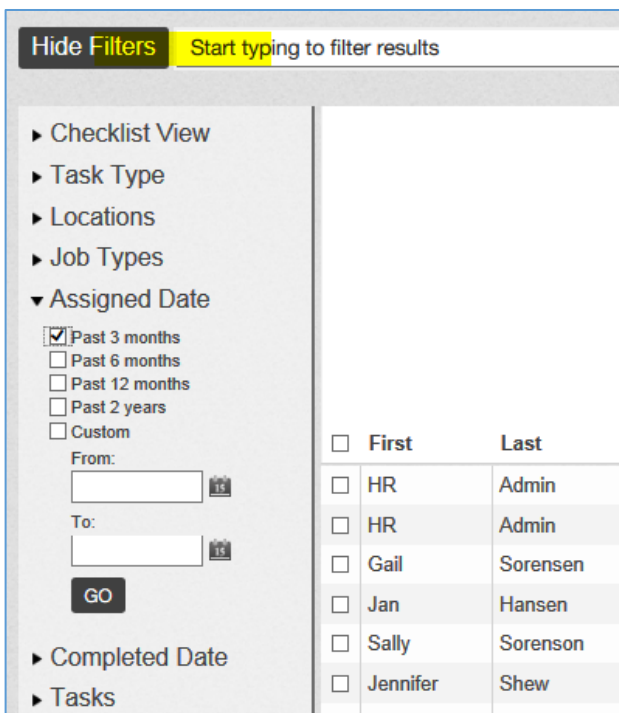
To **Send a Reminder**, Check the box next to the employee(s) you want to remind and then under Bulk Actions click GO with “Send Reminder” indicated in the dropdown box. This sends an email notification to the employee with the incomplete tasks listed as a reminder to work on them.

**NOTE:** if there are any incomplete supervisor or group user (admins/HR) tasks that were part of the checklist, that supervisor or group user is also notified of their incomplete task (for better or worse).



You also have the option to **FILTER** the report result. As these lists get really long with a lot of new hires, you’ll want to filter (most likely by a date range to see the most current records only). You can see there are quite a few filter options. At this time, you cannot save a filter (we hope to be able to in the future).

You can also just **search by employee name** in the line by the filter button if you just want to find a single person.



**WARNING:** If you want to adjust the “items per page” do it **BEFORE** you select your filters because changing after you’ve run the report with filters causes a refresh that removes your filter selections.

## PRINTING OPTIONS

**Print web version (TOP) vs PDF (BOTTOM) – both give the critical agreement in the “disclaimer” section, but the web version includes the instructions. I’m not quite sure why I duplicated the acknowledgement on top here so I might remove that.**

### INFORMATION CONFIDENTIALITY STATEMENT

Please read the Information Confidentiality Statement and acknowledge acceptance of the policy by electronic signature (I have received and understand it is my responsibility to read, understand and comply with this confidentiality agreement and the College's Family Educational Rights and Privacy Act (FERPA) policy.)

If you have any questions, please contact Human Resources.

Full Name \*

Brendon	Teegarden
---------	-----------

Department: \*

campus services

Indicate the name of the department where you will be working.

---

**INFORMATION CONFIDENTIALITY STATEMENT**

[Employee Information Confidentiality Statement.pdf](#)

---

### WORKFLOW

Attached Workflow

Information Confidentiality Statement

Current Status

Submitted

Submitted By

Brendon Teegarden

Workflow Steps

<div style="background-color: #28a745; color: white; padding: 2px; border-radius: 10px; display: inline-block;"> <span style="color: white;">✔</span> Completed                 </div>	1	Signed by Brendon Teegarden on 08/29/2016 at 06:52 AM Signature: brendon teegarden Disclaimer: I have received and understand it is my responsibility to read, understand and comply with this confidentiality agreement and the College's Family Educational Right and Privacy Act (FERPA) policy
<div style="background-color: #6c757d; color: white; padding: 2px; border-radius: 10px; display: inline-block;"> <span style="color: white;">▶</span> Current                 </div>	2	Review by Group: Human Resourc...

### Information Confidentiality Statement

<i>Full Name</i>	Brendon Teegarden
<i>Department:</i>	campus services

---

*INFORMATION CONFIDENTIALITY STATEMENT*

[Employee Information Confidentiality Statement.pdf](#)

---

<i>Attached Workflow</i>	Information Confidentiality Statement									
<i>Current Status</i>	Submitted									
<i>Workflow Steps</i>	<table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 5%; text-align: center;">1</td> <td style="width: 75%;">Signed by Brendon Teegarden on 08/29/2016 at 06:52 AM</td> <td style="width: 20%; text-align: right;">COCC</td> </tr> <tr> <td></td> <td style="font-size: x-small;">                     Signature: brendon teegarden                      Disclaimer: I have received and understand it is my responsibility to read, understand and comply with this confidentiality agreement and the College's Family Educational Right and Privacy Act (FERPA) policy                 </td> <td></td> </tr> <tr> <td style="text-align: center;">2</td> <td>Review</td> <td style="text-align: right;">Group:</td> </tr> </table>	1	Signed by Brendon Teegarden on 08/29/2016 at 06:52 AM	COCC		Signature: brendon teegarden Disclaimer: I have received and understand it is my responsibility to read, understand and comply with this confidentiality agreement and the College's Family Educational Right and Privacy Act (FERPA) policy		2	Review	Group:
1	Signed by Brendon Teegarden on 08/29/2016 at 06:52 AM	COCC								
	Signature: brendon teegarden Disclaimer: I have received and understand it is my responsibility to read, understand and comply with this confidentiality agreement and the College's Family Educational Right and Privacy Act (FERPA) policy									
2	Review	Group:								

## Q & A –HR HIRING PROCESSES RELATED TO ONBOARD

Q: When I hire a new employee (of any type), do they still need to come to Human Resources before starting?

A: First, please communicate to your new employees that they will receive email notifications from Onboard/TalentEd to move forward with completing their new hire paperwork (I-9, W-4, Payroll forms) and their orientation ONLINE (standard for their employment type + any department requirements). **New hires should still come to HR on their first day to provide I-9 supporting documents (ID docs)**, but all other new hire paperwork is completed online. HR is working to have a computer kiosk available in Newberry to help those with limited computer access. **Onboard is being used for ALL employees; ALL categories.**

**BENEFITED HIRES:** Regular benefited new hires will still meet with Human Resources for a face-to-face orientation to focus on the benefits package and general Q&A.

**PT INSTRUCTORS:** PT Instructors will still be encouraged to attend the face-to-face quarterly orientation sessions in addition to completing the online orientations.

Q: I'm confused about some of the recruiting processes; will Onboard impact current recruiting processes like background checks and hiring proposals/approvals?

A: Onboard picks up AFTER an individual is hired so recruiting processes are not impacted. Background checks are still done during the hiring process and an approved hiring proposal or Approval to Hire form are still required before a new hire would be added to the Onboard system. *Note that if you are hiring any staff other than single-pay stipend employees, you should be managing those recruitments in PeopleAdmin Recruit (including all Irregular Wage and Work Study positions). Please contact Christa in HR to get those postings established.*

Q: Does Onboard impact when a new hire can start working?

A: The “rules” for when a new hire can actually start working are not impacted/change by the use of Onboard. These HR processes and Federal Laws are not changed. Employees must complete their background check and be approved by HR for hire before starting. Then, they must complete their I-9 document within 3 days of starting so if they have worked 3 days and not yet completed their I-9 they are working in violation of Federal Law.

Q: When will the new hire be assigned their first (Welcome) checklist and how will they be notified that they have documents and orientation to complete online?

A: When an individual is “Hired” in PeopleAdmin Recruit, they will immediately receive the first email notification congratulating them on their new position and telling them to look for an email from Onboard to complete their new hire steps online. This hiring step will then also trigger HR to transition the new hire from Recruit over to Onboard and assign their *Welcome* checklist. When the Welcome checklist is assigned, the new hire will receive the Onboard email with instructions for logging in. Once they log in, they will receive further instructions about how the system works. They’ll receive another notification when their *Orientation* checklist is assigned, after they complete their I-9.

Q: Is there documentation to help me use Onboard as a supervisor or department administrative assistant?

A: Yes. There is a Supervisor-Admin Guide on the Onboard web page (the link to Onboard located under Resources on the Employee Login page of COCC website). The guide includes HOW TO LOGIN TO ONBOARD. This document will continue to be expanded and updated as new functionality is added or processes need to be modified so this will hold the most current version. Any major changes to the guide will be announced to direct everyone to get a current copy.

Q: I had a new hire last week that I sent to HR to complete paperwork and I was told they would have to redo all new paperwork online. Is this really the case?

A: For audit reasons (I-9) and process consistency reasons that impact other departments like payroll, CPS, campus services, HR does need them to complete the process online in most cases and will evaluate on a case-by-case basis.

Q: I have some positions (Irreg wage or WS) that are not filled using PeopleAdmin recruit. How will they be entered in Onboard?

A: First, If you have any positions that are not currently managed through PeopleAdmin Recruit (including Irreg Wage and Work Study); please contact Christa Gunnell ASAP to bring those postings into PeopleAdmin. There are many benefits to processing all recruitments through PeopleAdmin, including: elimination of paper, background check processing, having a pipeline of applicants, and transitioning those hired into Onboard. Until you are able to do that, the Approval to Hire document will trigger the creation of an employee record in Onboard.

Q: I have a returning employee who worked in the Spring and is returning for 2016-17 year. Do they have to go through the entire onboard orientation / new paperwork again?

Similar question for employees just transferring between departments.

A: Onboard will ask the new hire what their current employment status is (already working; worked previously). If they respond “yes” to indicate current or rehire status, they are instructed to stop with the process and wait for HR to adjust their task list based on their status. HR is automatically notified of “yes” answers to make adjustments and will customize their task list based on the scenario to eliminate unrequired tasks. However, they will probably still be assigned the majority of the orientation because it’s important information they may have not received in prior years.

**NOTE:** Depending on the length of an employee’s “break in service”, they may need to repeat their background check and resubmit their I-9 etc. HR will customize their Onboard tasks according to their specific situation and communicate background check requirements/status to supervisors.

Q: I have a returning employee that did NOT go back through PeopleAdmin Recruit in returning, will they be added to onboard? Do I still submit the Approval to Hire form?

A: If they are rehired outside of PeopleAdmin Recruit, they WILL be added to Onboard when the Approval to Hire form is received. The paper Approval to Hire form will still be used in this scenario. Receipt of the form will trigger HR to create the employee record directly into Onboard and assign their orientation.

Q: Our recently hired irregular wage students have been assigned all of the SafeColleges trainings (I believe there are 4, totaling about 90 minutes of training). Will this be the case going forward? I'm just wondering about adjusting training and pay as appropriate.

A: All college employees have been required to take the trainings in the past, but you may not have been aware of it as it was communicated in the HR new hire packet of information so if they didn't share that with you, perhaps you didn't realize it. They will continue to be required to take the trainings and that is the most time consuming part of the orientation. They should not be working on the orientation until they are working, and thus, they are paid to do it on work time – this has not changed because of Onboard.

Q: What is the process for "Stipend" employees (employees paid for a single assignment like photographers and sports referees)?

A: These hires will still complete their required "paperwork" online (I-9, W-4, Payroll), but they will not be assigned an orientation and no supervisor tasks are assigned. The Approval to Hire/Stipend form submitted by the supervisor will trigger HR to create a Stipend new hire task list so they will still complete these forms online.

Q: How long does the new hire have to complete their checklists?

A: For the **Welcome** checklist that contains the I-9, they must complete this within 3 days of their start day as required by law. This checklist also contains the W-4 and Employee Info/Payroll form which are also time sensitive to set up the new hire up in Banner etc.

For the **Orientation** checklist(s), HR will set the due date for two weeks from their start date as a recommended guideline. Departments that have additional tasks or want to allow more time are free to do so, but the processes shouldn't drag out beyond three weeks for the employees benefit. The sooner the employee completes the orientation and gets acclimated, the sooner they can start concentrating on learning their job.

Q: As an Administrative Assistant, I was under the impression we would be added to the supervisor communication for PeopleAdmin so we can direct new hires as appropriate- is this still the plan? If so, would this be something my supervisor sets up, or would HR set it up?

A: If by "communication" you mean that you will also get Onboard notification emails and see the supervisor task list..... We do have a "dual supervisor" setup for the departments (if applicable) so that both the administrative assistant and supervisor get notifications and see the same checklist to "share" the processing of the checklist.

Q: Can a department add specific department orientation tasks to the new hire's orientation?

A: Yes, a custom orientation checklist can be created and examples are available. Those departments interested in creating a customized department level orientation should work with Gail to develop a checklist. Please use the Template for Custom Department Orientations (link to this on the COCC Onboard webpage) to communicate your desired department orientation tasks and then schedule a meeting with Gail. While departments can select their rollout date, the implementation does need to come to a conclusion so please work to have your initial implementation completed by November. Expansions/modifications will continue to be available through Human Resources.