

My now hire

How to Manage New Hire Onboarding for <u>HR Onboarding Delegates</u>

This job aid provides step-by-step directions for the **HR Onboarding Delegates** on managing and tracking the tasks of the onboarding process before a New Hire's first day and during their first 30 days.

The onboarding portal will be available to new hires once they accept the Written Offer and complete the New Hire Form.

- 1. Log in to <u>my.columbia.edu</u>; under the HR Manager Resources tab, select "TalentLink."
- 2. On your Manager Dashboard, navigate to the Offers tile.
- 3. To view your list of new hires, click on the **New hires** link.

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Advertisements	Applicant Progress Board	Applications
O Advertisements	A holistic view of the applications for each active job you are recruiting for Review applications	O Jobs have applicants for review
1	R	
Search committee review	Interviews	Offers
O Jobs requiring panel review	O Scheduled interviews	O Offers awaiting your approval 1 New hires 4 New hire tasks
		ew file tasks

4. You will be redirected to a new screen listing your new hires.

wy new nires	,				
Applicant name	Requisition Number	Posting Title	Application status	Start date	
Test Applicant	508066	Short-Term Casual (TEST)	Hired/Initiate Onboarding (Test Status for Onboarding Portal)	Apr 25, 2022	View offer details View all tasks Disable Onboarding Emails
Page 1 of 1 🎾					Records 1 to 1 of 1

- You access the new hire's application, resume, and personal information, by clicking on the *Applicant Name* link.
- You can view the offer details, by clicking on the *View Offer Details* link.
- You can disable onboarding communications by clicking the *Disable Onboarding Emails* link.
- 5. To view and search for specific tasks if you have multiple applicants click on New Hire Tasks.

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	Advertisements O Advertisements	Applicant Progress Board A holistic view of the applications for each active job you are recruiting for Review applications	Applications O Jobs have applicants for review	
	Search committee review	Figure 1 Interviews O Scheduled interviews	offers Offers O offers awaiting your approval 1 New hires 4 New hire tasks	



My new hire tasks							
Employee:	Task: Activate Your Columbia Uni Lunch with Dan Driscoll Meet with Your New Manag Set-up Work Station and So	er		Clear Search			
Select 💽 Title	Employee	UniID	Step due	Onboarding Task Team	Јор	Start date	
Meet with Your New Manager	Test Applicant			Kane Noble	Short-Term Casual (TEST)	Apr 25, 2022	View all tasks
Activate Your Columbia University Network ID (UNI)	Test Applicant		Apr 23, 2022	Kane Noble	Short-Term Casual (TEST)	Apr 25, 2022	View all tasks
Set-up Work Station and Software Access	Test Applicant		Apr 24, 2022	Kane Noble	Short-Term Casual (TEST)	Apr 25, 2022	View all tasks
Lunch with Dan Driscoll	Test Applicant		May 31, 2022, 12:00pm	Kane Noble	Short-Term Casual (TEST)	Apr 25, 2022	View all tasks
Page 1 of 1 🎢							Records 1 to 4 of 4

The new hire tasks page will:

- display all onboarding tasks assigned to the onboarding task team, along with the task due date,
- employee start date and employee job title.
- You can click on the 'view all tasks' link on the right side of the screen to access all new hire tasks for the employee.

Note: You can also access the new hires and new hire task dashboards through the left-hand menu.

FILTERING THE NEW HIRE TASKS DASHBOARD

If you have a long list of tasks assigned to you as a member of the onboarding task team, you can use the **Employee** and **Task** checkboxes to filter your search.

- 1. To find all tasks associated with a particular employee or employees, check the relevant boxes within the employee box and click the search button.
- 2. To find tasks associated with one or more employees, check the relevant boxes within the task box and click the search button.

Bulk Complete					
My new hire tasks					
Employee: Test Applicant	□ Lunch with □ Meet with `	ur Columbia Uni Dan Driscoll Your New Manag rk Station and So	er		Clear Search
Select V Title		Employee	UniID	Step due	Onboarding Task Team
Select Title		Employee Test Applicant	UnilD	Step due	Onboarding Task Team Kane Noble
			UnilD	Step due	-
Meet with Your New Manager		Test Applicant	UnilD		Kane Noble
Meet with Your New Manager Activate Your Columbia University Network ID (UNI)		Test Applicant Test Applicant	UnilD	Apr 23, 2022	Kane Noble

3. You can also use both the employee and task checkboxes for a combined search.

Bulk Complete					
My new hire tasks					
Employee:	Task:				Clear Search
Test Applicant	Activate You Meet with You				
	Lunch with I	Dan Driscoll Station and Softwa	e Access	•	
Select 💌 Title		Employee	UniID	Step due	Onboarding Task Team
Meet with Your New Manager		Test Applicant			Kane Noble
Activate Your Columbia University Network ID (UNI)		Test Applicant		Apr 23, 2022	Kane Noble



COMPLETING ONBOARDING TASKS

Within the new hire tasks dashboard, you can mark tasks assigned to the onboarding task team as complete, either by one or in bulk.

1. To view the task description, click on the task title:

Bulk Complete					
My new hire tasks					
Employee:	Task:				Clear Search
Test Applicant		ur Columbia Uni	versity Net	work ID (UI	
	Lunch with				
		Your New Manag			
	Set-up Wo	rk Station and So	ftware Acce	255	
Select Title		Employee	UnilD	Step due	Onboarding Task Tea
Meet with Your New Manager		Test Applicant			Kane Noble
Activate Your Columbia University Network ID (UNI)		Test Applicant		Apr 23, 2022	Kane Noble
Set-up Work Station and Software Access		Test Applicant		Apr 24, 2022	Kane Noble
Lunch with Dan Driscoll		Test Applicant		May 31, 2022, 12:00pm	Kane Noble

2. In the task pop-up, you can view the task details and close the task, or mark it as complete:

source that a monting with your now man	nager has been scheduled for your first day.
isure that a meeting with your new man	lager has been scheduled for your first day.
Mark as completed	Close

3. Once a task is marked as complete, it will no longer appear on your new hire tasks dashboard. You can still see this task on the new hire's dashboard that displays all onboarding tasks.

Bulk completion of onboarding tasks

To mark multiple tasks as complete in one action, select the checkboxes on the left of the screen against the relevant tasks, and click the bulk complete button at the top of your dashboard:

Bulk Complete					
My new hire tasks					
Employee:	Lunch wit Meet with	our Columbia Uni h Dan Driscoll Your New Manag ork Station and So	er		Clear Search
Select 🗸 Title		Employee	UniID	Step due	Onboarding Task Tear
Meet with Your New Manager		Test Applicant			Kane Noble
Activate Your Columbia University Network ID (UNI)		Test Applicant		Apr 23, 2022	Kane Noble
Set-up Work Station and Software Access		Test Applicant		Apr 24, 2022	Kane Noble
Lunch with Dan Driscoll		Test Applicant		May 31, 2022, 12:00pm	Kane Noble

TALENT S LINK

MANAGE ALL ONBOARDING TASKS FOR A NEW HIRE

From within the New hires or new hire tasks dashboard, you can view all onboarding tasks for a specific new hire (assigned to the new hire, onboarding task team, or both) by clicking on the **View all tasks** link.

1. New hires dashboard:

/ <mark>ly new hire</mark>	s				
Applicant name	Requisition Number	Posting Title	Application status	Start date	
Fest Applicant	508066	Short-Term Casual (TEST)	Hired/Initiate Onboarding (Test Status for Onboarding Portal)	Apr 25, 2022	View offer details View all tasks Disable Onboarding Email

2. The onboarding dashboard for each new hire displays their name, position, start date, and a list of all onboarding tasks that you can manage as part of the onboarding task team.

Bulk Complete							
My new hire tasks							
Employee:	Task: Activate Your Columbia Uni Lunch with Dan Driscoll Meet with Your New Manag Set-up Work Station and So	er		Clear Search			
Select 💽 Title	Employee	UniID	Step due	Onboarding Task Team	Job	Start date	- +
Meet with Your New Manager	Test Applicant			Kane Noble	Short-Term Casual (TEST)	Apr 25, 2022	View all ta
Activate Your Columbia University Network ID (UNI)	Test Applicant		Apr 23, 2022	Kane Noble	Short-Term Casual (TEST)	Apr 25, 2022	View all ta
Set-up Work Station and Software Access	Test Applicant		Apr 24, 2022	Kane Noble	Short-Term Casual (TEST)	Apr 25, 2022	View all ta
	Test Applicant		May 31, 2022, 12:00pm	Kane Noble	Short-Term Casual (TEST)	Apr 25, 2022	View all ta
Lunch with Dan Driscoll							

3. Each task is allocated to a group (e.g., Before your first day) and assigned to the new hire, onboarding task team member, or both. If applicable, the task due date will display in the dashboard and the task status (e.g., open, completed, overdue).

PageUp. BETA				People	Kane 🗸
New hire tasks					
Test Applicant					
Position Short-Term Casual (TEST)					dd new ti
Start date	Task	Assigned to	Due date	Status	
Notify updates	Before Your First Day			•	+ Ad
Add optional tasks	Learn More About Columbia University	Test Applicant	_	Completed	
No tasks	Activate Your Columbia University Network ID (UNI)	Kane Noble & Test Applicant	23 Apr 2022	Open	
My Favorite Tasks V	Ensure Compliance with Columbia COVID Protocols	Test Applicant	24 Apr 2022	Open	
	Review Columbia's Comprehensive Benefits Package	Test Applicant		Open	
	Complete Your Tax Forms	Test Applicant	24 Apr 2022	Open	

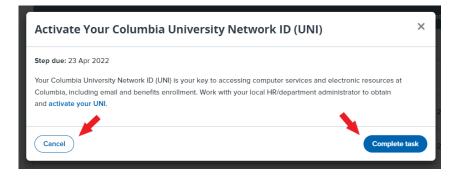
VIEW AND COMPLETE A TASK

To view a task's description and instructions, click on the task title:

Task	Assigned to
Before Your First Day	
Learn More About Columbia University	Test Applicant
Activate Your Columbia University Network ID (UNI)	Kane Noble & Test Applicant
Ensure Compliance with Columbia COVID Protocols	Test Applicant



In the task pop-up, you can view the task details and close the task, or mark it as complete:



Note: You can also view the details of a task assigned to your new hire. However, you will not be able to mark those tasks as complete.

EDIT A TASK

To edit an existing task, click on the pencil icon to the right of the relevant onboarding task:

Task	Assigned to	Due date	Status	
Before Your First Day				+ Add
Learn More About Columbia University	Test Applicant		Completed	L
Activate Your Columbia University Network ID (UNI)	Kane Noble & Test Applicant	23 Apr 2022	Open	L
Ensure Compliance with Columbia COVID Protocols	Test Applicant	24 Apr 2022	Open	L
Review Columbia's Comprehensive Benefits Package	Test Applicant		Open	Z
Complete Your Tax Forms	Test Applicant	24 Apr 2022	Open	L
Complete New Hire Orientation	Test Applicant		Open	Z
Set-up Work Station and Software Access	Kane Noble	24 Apr 2022	Open	L
Initiate I-9 Form Part I	Test Applicant	24 Apr 2022	Open	1

In the edit task pop-up window, you will be able to:

- 1. Modify the title of the onboarding task
- 2. Change the group the task is assigned to (e.g., Before your First Day, Your First Week, etc.)
- 3. Add, or update the task due date and time
- 4. Update the task description
 - a. You can use the merge fields link (4a) to insert merge fields into the task description and create a personalized task for your new hire.
 - b. You can customize the text and insert additional elements. Click on the ellipsis symbol (4b) to the right of the description box to view all text editor options.



Edit task		×
Title*		
Set-up Work Station	n and Software Access	
Group*		
Before Your First D	ау	\$
Due date	Due time	
Apr 24, 2022	iii -:	0
Description		4a Merge fields
		4b (2)
BI⊻S		
Ensure your new phone, etc.) and	hire's work station is set-u access has been requested their role (for example Co	for the software
Ensure your new phone, etc.) and they will need for	hire's work station is set-u access has been requested their role (for example Co	for the software

- 5. Please disregard the activity type field
- 6. Update to whom the task will be allocated to
- 7. If you select 'manager' as the assignee, you have the option to assign the task to another user. The assigned task owner will receive an email notification informing them that an onboarding task has been assigned to them and a task reminder email, if applicable.
- 8. Click 'update' to save your revisions.

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_	Sel		he										0		
6			cated		nager	() E	Emplo	yee							
_	Addit	tiona	ıl tasl	owi	ıer										
7	Sea	arch													×
	Ca	ince	D								8	U	pdat	•	

ADD A NEW TASK

If you want to add a new onboarding task, click on add new task or the **+Add** button next to each task group:

			Add	new task
Task	Assigned to	Due date	Status	
Before Your First Day			➡ (+ Add
Learn More About Columbia University	Test Applicant		Completed	2
Activate Your Columbia University Network ID (UNI)	Kane Noble & Test Applicant	23 Apr 2022	Open	2
Ensure Compliance with Columbia COVID Protocols	Test Applicant	24 Apr 2022	Open	Z
Review Columbia's Comprehensive Benefits Package	Test Applicant		Open	L



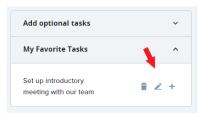
Complete the task details (please use the 'edit task' screenshots above as a visual reference):

- 1. Enter a task title
- 2. Select a task group (e.g., Before Your First Day)
- 3. Indicate a due date and time
- 4. Add a task description using the merge fields and rich text editor features where applicable
- 5. Disregard the activity type field
- 6. Assign task to employee, manager, or both. If selecting a manager, you can assign this task to another user. The assigned task owner will receive an email notification informing them that an onboarding task has been assigned to them
- 7. Add to favorites (this will add the task to the 'my favorite tasks' section to the left of your dashboard)
- 8. Click the create button to save the new task.

New task	×
Reminder to ask team members to set up 15 minute catch- ups with our new hire.	
Activity type	
Task allocated to*	
Additional task owner	
Add to favorites	
Cancel	te

MY FAVORITE TASKS

- 1. New tasks that you create and add as a favorite will be available under the 'my favorite tasks' section for quick reference and to add the task to other new hires in the future.
- 2. Editing a favorite task will not retroactively update favorite tasks already added to a new hire's task list.
- 3. Using the icons against each favorite task, you can
 - remove a task (trash can icon),
 - edit the task (pencil icon),
 - assign it to the new hire (plus icon) whose tasks dashboard you're viewing





OPTIONAL TASKS

Optional Tasks are managed by CU Human Resources. If Optional tasks are listed, you can add them to your new hire's task list if applicable, in the 'add optional tasks' section of the dashboard.

You have the ability to edit optional tasks. Click on the + icon against the task to review the task details and add it to the task list:

Add optional tasks	^
Systems overview	+
My Favorite Tasks	~

A pop-up will open with the pre-defined task details. On this screen, you can:

- 1. Modify the title of the onboarding task
- 2. Change the group the task is assigned to (e.g., Before your First Day, Your First Week, etc.)
- 3. Add, or update the task due date and time
- 4. Update the task description
 - a. You can use the merge fields link (4a) to insert merge fields into the task description and create a personalized task for your new hire.
 - b. You can customize the text and insert additional elements. Click on the ellipsis symbol (4b) to the right of the description box to view all text editor options.

New task	×
Title* 1 Systems overview	
Group* 2 Your First Month	
Due date Due time	
Description 4a Merge fiel ▲B / 및 S ■ · := · := · := 4b ··· (3)	
Formats – <u>A</u> – <u>A</u> – \mathscr{O} E R \boxplus – <u>T</u> \leftrightarrow	9
Please review the <u>attached documentation</u> for an overview of the frequently used systems at Columbia University.	Ţ
Cancel	ate

- 5. Please disregard the activity type field
- 6. Update to whom the task will be allocated to
- 7. If you select 'manager' as the assignee, you have the option to assign the task to another user. The assigned task owner will receive an email notification informing them that an onboarding task has been assigned to them and a task reminder email, if applicable.

TALENT S LINK

8. Click 'update' to save your revisions. The task will now appear in the task list under the relevant task group heading.

New task	>	<
B / ⊻ S ≣ E ⊡ ⊡	(?)	-
Formats - <u>A</u> - <u>A</u> - <i>O</i> E R = <u>T</u> <>		
Please review the <u>attached documentation</u> for an over of the frequently used systems at Columbia University		
Activity type	h.	
Select	٥	1
Task allocated to*		1
Both O Manager Employee		1
Additional task owner		1
Search		1
(Cancel) 8	Create	

NOTIFY NEW HIRE OF UPDATES

If you have added or edited tasks assigned to your new hire, you can inform them by clicking on the notify updates button:

Test Applicant Position Short-Term Casual (TEST)	
Start date	Task
Notify updates	Before Your First Day
Add optional tasks 🗸	Learn More About Columbia University
My Favorite Tasks 🗸	Activate Your Columbia University Network ID (UNI)
	Ensure Compliance with Columbia COVID Protocols
	Review Columbia's Comprehensive Benefits Package

In the email pop-up, you will be able to modify the sender's email address, subject, and communication template as applicable. Then, click the send button to send the email to your new hire:

From*		
kane.noble@	pageuppeople.com	
Subject*		
Onboarding	Fask Updated	
		Merge field
Message*		merge nerd.
B Z ⊔		··· ⑦
		··· @
B Z ⊔	COLUMBIA UN	··· @
B I U Dear Test, This is a not	COLUMBIA UN	··· © NIVERS YORK
B I U Dear Test, This is a not been made	COLUMBIA UN I THE CITY OF NEW	··· © NIVERS YORK
B I U Dear Test, This is a not been made	COLUMBIA UN THE CITY OF NEW	··· © NIVERS YORK



ASSIGN AN ONBOARDING WORKFLOW TO A CANDIDATE

You can assign the appropriate offer process to a candidate when you submit the offer card.

Click on the Onboarding Workflow dropdown to select the appropriate onboarding process.

New Hire Form:*	New Hire/Rehire Form	~
Onboarding Workflow:	None	~
Ophoarding	None	
Onboarding Delegate:	Internal Transfer	
Delegate.	New Employee - CU	
	New Employee - CUIMC	
	No Onboarding	
Reports to	Non-Benefits Eligible - CU	
manager:*	Non-Benefits Eligible - CUIMC	
	Title: Director-Recruiting	
Reports to		_
Manager Business Title:*	Director, Recruiting	

Onboarding workflows:

- Internal Transfers: For employees transferring within Columbia University
- New Employee CU: For new Officers and Staff
- New Employee CUIMC: Onboarding process for the Medical Center
- No Onboarding: For promotions and job upgrades within a department
- Non-Benefits Eligible CU: Non-benefit eligible roles (VHO, temporary roles less than four months, temporary part-time roles, less than 20 hours per week)
- Non-Benefits Eligible CUIMC: Non-benefit eligible roles (VHO, temporary roles less than four months, temporary part-time roles, less than 20 hours per week)