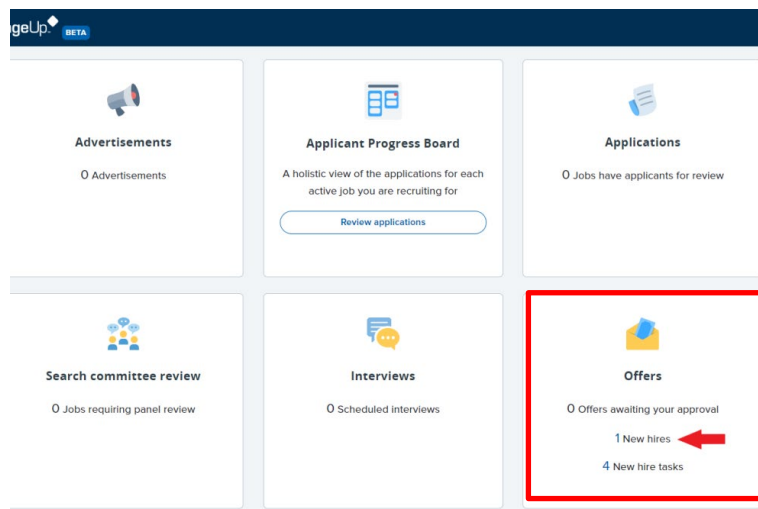


## How to Manage New Hire Onboarding for Hiring Managers

This job aid provides step-by-step directions for **Hiring Managers** 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 [my.columbia.edu](https://my.columbia.edu); 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.



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

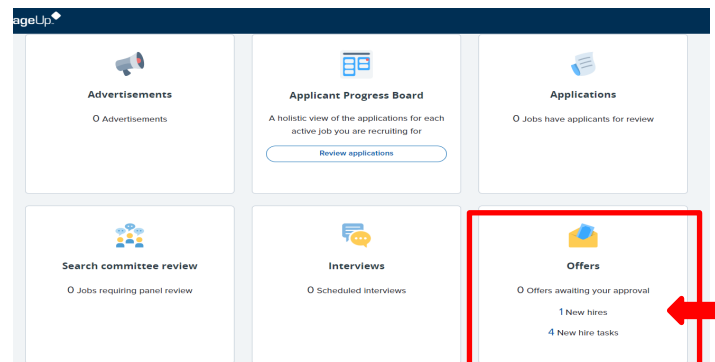
My new hires

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	<a href="#">View offer details</a>   <a href="#">View all tasks</a>   <a href="#">Disable Onboarding Emails</a>

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.



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.

**My new hire tasks**

Employee: ☐ Test Applicant

Task: ☐ Activate Your Columbia University Network ID (UNI) ☐ Lunch with Dan Driscoll ☐ Meet with Your New Manager ☐ Set-up Work Station and Software Access

Select	Title	Employee	UnitID	Step due	Onboarding Task Team	Job	Start date	
<input type="checkbox"/>	Meet with Your New Manager	Test Applicant			Kane Noble	Short-Term Casual (TEST)	Apr 25, 2022	<a href="#">View all tasks</a>
<input type="checkbox"/>	Activate Your Columbia University Network ID (UNI)	Test Applicant		Apr 23, 2022	Kane Noble	Short-Term Casual (TEST)	Apr 25, 2022	<a href="#">View all tasks</a>
<input type="checkbox"/>	Set-up Work Station and Software Access	Test Applicant		Apr 24, 2022	Kane Noble	Short-Term Casual (TEST)	Apr 25, 2022	<a href="#">View all tasks</a>
<input type="checkbox"/>	Lunch with Dan Driscoll	Test Applicant		May 31, 2022, 12:00pm	Kane Noble	Short-Term Casual (TEST)	Apr 25, 2022	<a href="#">View all tasks</a>

Page 1 of 1 | [🔍](#) Records 1 to 4 of 4

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

## 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:

**PageUp** BETA People Kane ?

**My new hires**

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	<a href="#">View offer details</a>	<a href="#">View all tasks</a>	<a href="#">Disable Onboarding Emails</a>

Page 1 of 1 | [🔍](#) Records 1 to 1 of 1

- 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.
- 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)  
Start date  
Apr 25, 2022  
[Notify updates](#)

[Add optional tasks](#)  
No tasks  
[My Favorite Tasks](#)

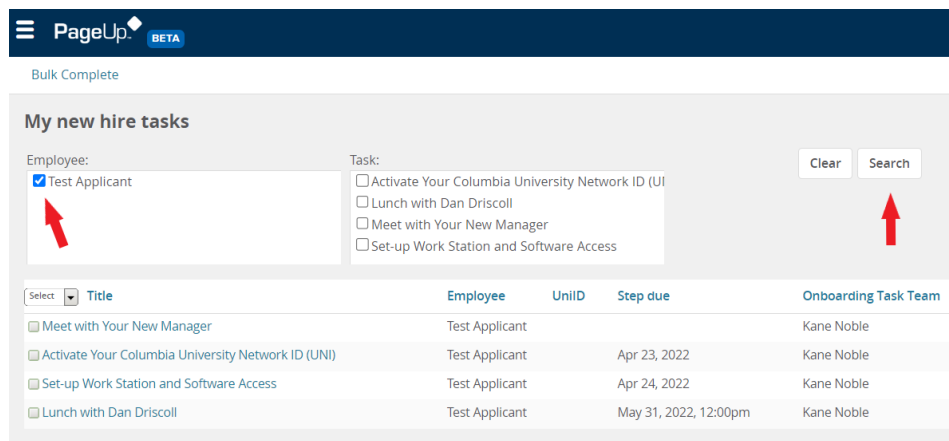
[Add new task](#)

Task	Assigned to	Due date	Status
<b>Before Your First Day</b>			<a href="#">+ Add</a>
Learn More About Columbia University	Test Applicant		Completed <a href="#">✎</a>
Activate Your Columbia University Network ID (UNI)	Kane Noble & Test Applicant	23 Apr 2022	Open <a href="#">✎</a>
Ensure Compliance with Columbia COVID Protocols	Test Applicant	24 Apr 2022	Open <a href="#">✎</a>
Review Columbia's Comprehensive Benefits Package	Test Applicant		Open <a href="#">✎</a>

## 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.



**PageUp BETA**

Bulk Complete

### My new hire tasks

Employee:

☒ Test Applicant

Task:

☐ Activate Your Columbia University Network ID (UI)

☐ Lunch with Dan Driscoll

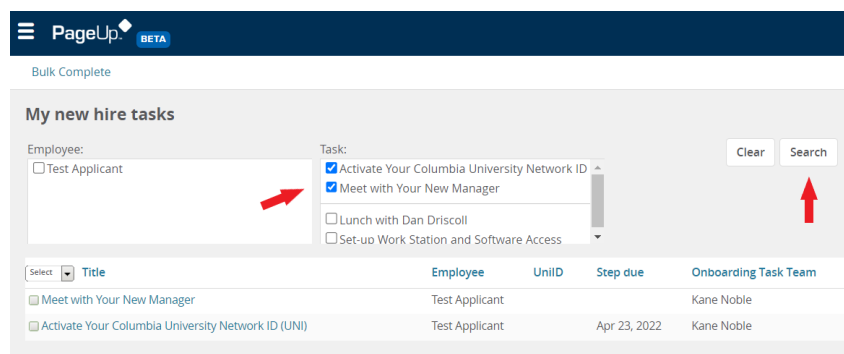
☐ Meet with Your New Manager

☐ Set-up Work Station and Software Access

Clear Search

Select	Title	Employee	UnitID	Step due	Onboarding Task Team
<input type="checkbox"/>	Meet with Your New Manager	Test Applicant			Kane Noble
<input type="checkbox"/>	Activate Your Columbia University Network ID (UNI)	Test Applicant		Apr 23, 2022	Kane Noble
<input type="checkbox"/>	Set-up Work Station and Software Access	Test Applicant		Apr 24, 2022	Kane Noble
<input type="checkbox"/>	Lunch with Dan Driscoll	Test Applicant		May 31, 2022, 12:00pm	Kane Noble

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



**PageUp BETA**

Bulk Complete

### My new hire tasks

Employee:

☐ Test Applicant

Task:

☒ Activate Your Columbia University Network ID (UNI)

☒ Meet with Your New Manager

☐ Lunch with Dan Driscoll

☐ Set-up Work Station and Software Access

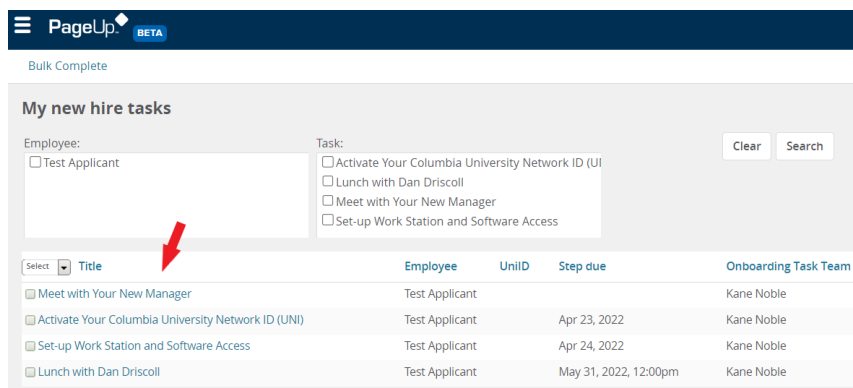
Clear Search

Select	Title	Employee	UnitID	Step due	Onboarding Task Team
<input type="checkbox"/>	Meet with Your New Manager	Test Applicant			Kane Noble
<input type="checkbox"/>	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:



**PageUp BETA**

Bulk Complete

### My new hire tasks

Employee:

☐ Test Applicant

Task:

☐ Activate Your Columbia University Network ID (UI)

☐ Lunch with Dan Driscoll

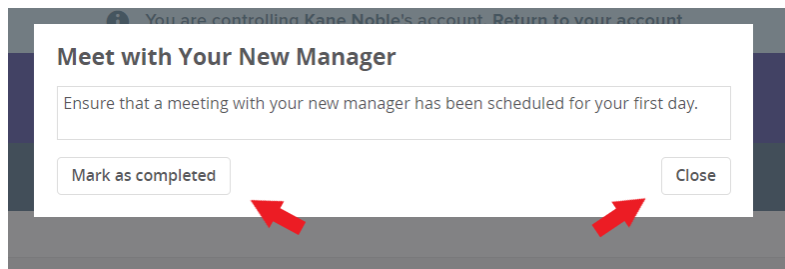
☐ Meet with Your New Manager

☐ Set-up Work Station and Software Access

Clear Search

Select	Title	Employee	UnitID	Step due	Onboarding Task Team
<input type="checkbox"/>	Meet with Your New Manager	Test Applicant			Kane Noble
<input type="checkbox"/>	Activate Your Columbia University Network ID (UNI)	Test Applicant		Apr 23, 2022	Kane Noble
<input type="checkbox"/>	Set-up Work Station and Software Access	Test Applicant		Apr 24, 2022	Kane Noble
<input type="checkbox"/>	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. If the task is assigned to the Hiring Manager, you will be able to mark it as complete.

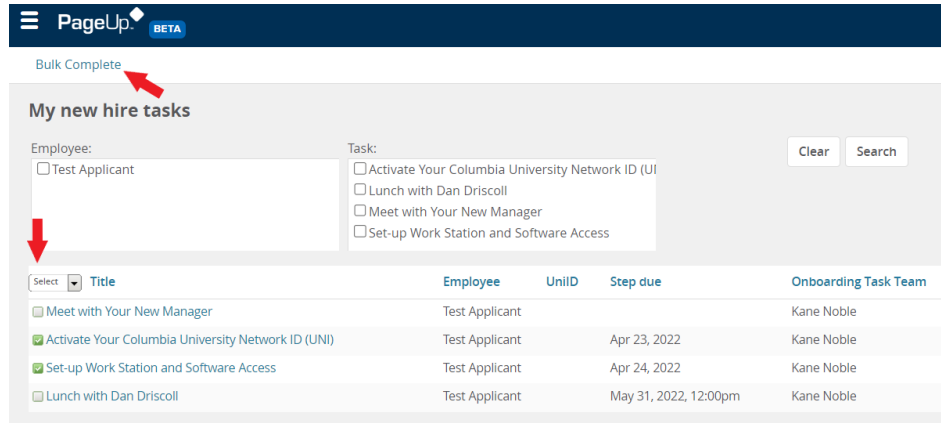


3. Once a task is marked as complete, it will no longer appear on your tasks dashboard. You can still see this task on the new hire's dashboard that displays all onboarding tasks.
4. If a task is assigned to both the hiring manager and the employee, once you update it complete it will show if it pending completion by the employee.

Activate Your Columbia University Network ID (UNI)	Ursula Bollini & Brendan Feifer	14 May 2022	Hiring manager completed and pending employee completion	
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### Bulk completion of onboarding tasks

To mark multiple Onboarding Team 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:



### VIEW AND COMPLETE A TASK

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

Task	Assigned to
<b>Before Your First Day</b>	
<a href="#">Learn More About Columbia University</a>	Test Applicant
<a href="#">Activate Your Columbia University Network ID (UNI)</a>	Kane Noble & Test Applicant

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.

### Learn More About Columbia University



Learn about Columbia's mission, history, key facts and more.

<https://www.columbia.edu/content/about-columbia>

Cancel

## 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	
Activate Your Columbia University Network ID (UNI)	Kane Noble & Test Applicant	23 Apr 2022	Open	
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	
Complete New Hire Orientation	Test Applicant		Open	
Set-up Work Station and Software Access	Kane Noble	24 Apr 2022	Open	

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 [...] to the right of the description box to view all text editor options.

**Edit task**

Title\*  
1 Set-up Work Station and Software Access

Group\*  
2 Before Your First Day

Due date  
3 Apr 24, 2022

Due time  
4a Merge fields

Description  
4b ...

Ensure your new hire's work station is set-up (computer, phone, etc.) and access has been requested for the software they will need for their role (for example Concur, PAC, ARC, ServiceNow, etc.).

Cancel Update

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.

**Edit task**

Description  
Merge fields

Activity type  
5 Select

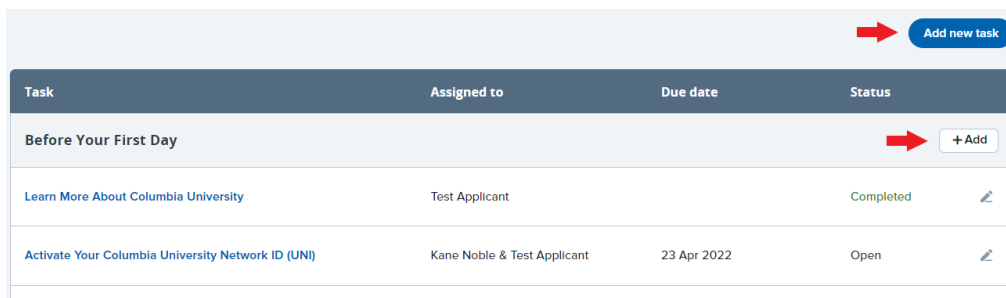
Task allocated to\*  
6 Both ☒ Manager ☐ Employee




Additional task owner  
7 Search

Cancel 8 Update

## ADD A NEW TASK

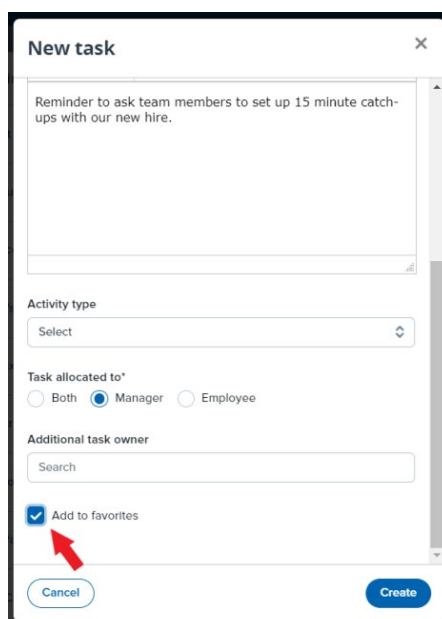
If you want to add a new onboarding task, click on add new task or the **+Add** button next to each task group:



Task	Assigned to	Due date	Status
Before Your First Day			 + Add
<a href="#">Learn More About Columbia University</a>	Test Applicant		Completed 
<a href="#">Activate Your Columbia University Network ID (UNI)</a>	Kane Noble & Test Applicant	23 Apr 2022	Open 

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  
Select

Task allocated to\*  
☐ Both
 ☒ Manager
 ☐ Employee

Additional task owner

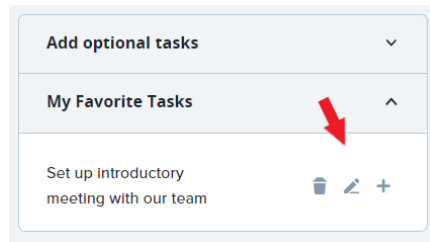
☒ Add to favorites

Cancel Create

## 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),

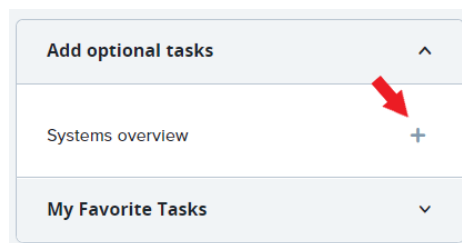
- assign it to the new hire (plus icon) whose tasks dashboard you're viewing



## 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:



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.

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. The task will now appear in the task list under the relevant task group heading.

## 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:

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: