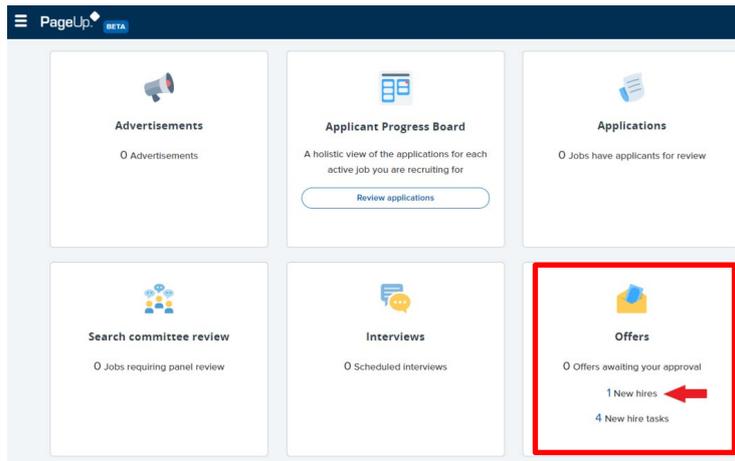


How to Manage New Hire Onboarding for HR Onboarding Delegates

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 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.

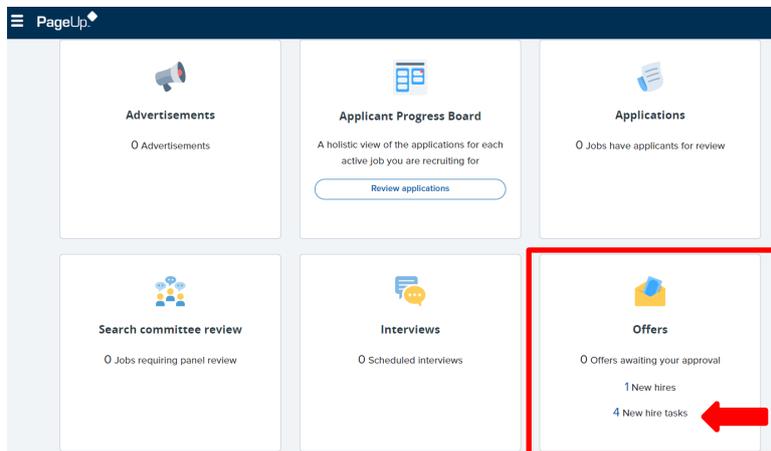
My new hires

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	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**.



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

Select	Title	Employee	UnID	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	View all tasks
<input type="checkbox"/>	Activate Your Columbia University Network ID (UNI)	Test Applicant		Apr 23, 2022	Kane Noble	Short-Term Casual (TEST)	Apr 25, 2022	View all tasks
<input type="checkbox"/>	Set-up Work Station and Software Access	Test Applicant		Apr 24, 2022	Kane Noble	Short-Term Casual (TEST)	Apr 25, 2022	View all tasks
<input type="checkbox"/>	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.

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

Select	Title	Employee	UnID	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

Page 1 of 1 | [↗](#)

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 (UI) Meet with Your New Manager Lunch with Dan Driscoll Set-up Work Station and Software Access

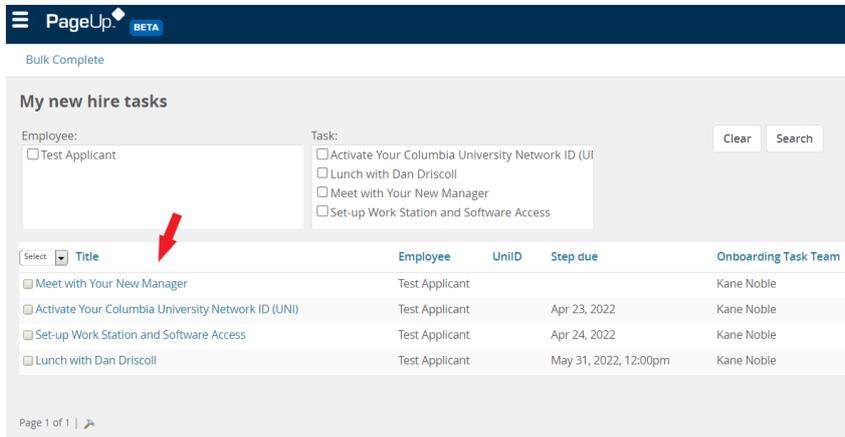
Select	Title	Employee	UnID	Step due	Onboarding Task Team
<input type="checkbox"/>	Meet with Your New Manager	Test Applicant			Kane Noble
<input type="checkbox"/>	Activate Your Columbia University Network ID (UNI)	Test Applicant		Apr 23, 2022	Kane Noble

Page 1 of 1 | [↗](#)

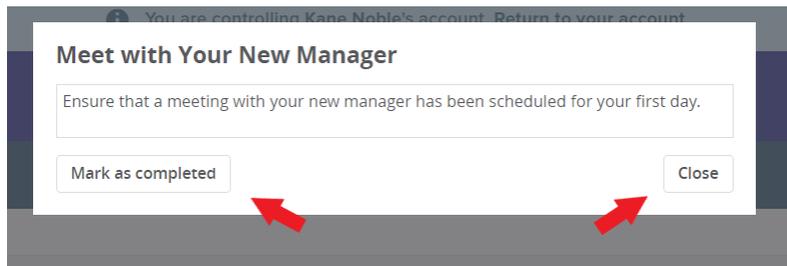
COMPLETING ONBOARDING TASKS

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:



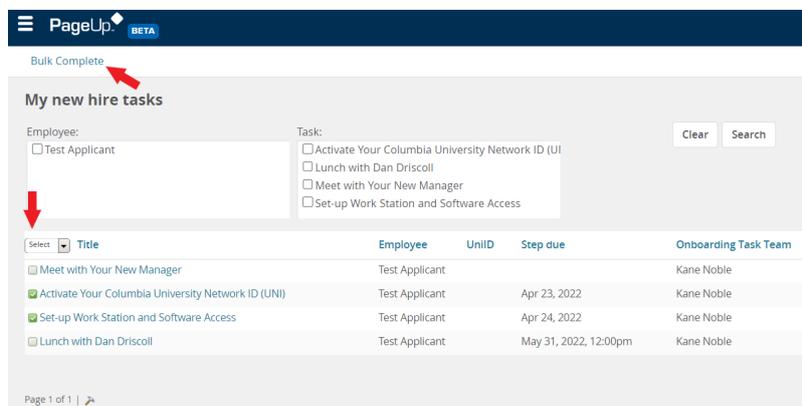
2. In the task pop-up, you can view the task details and close the task, or mark it as complete:



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:



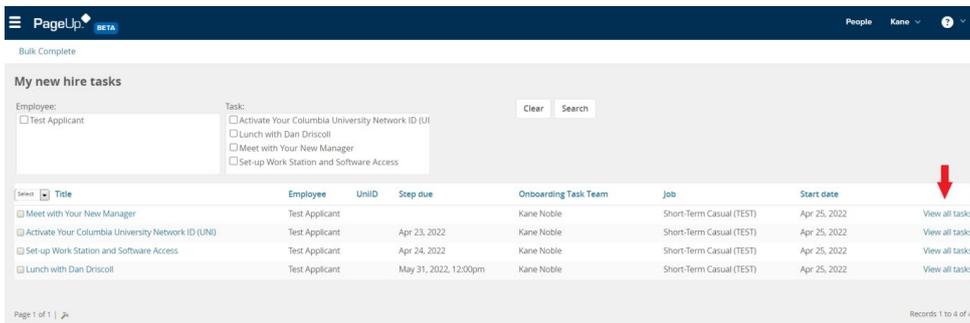
MANAGE ALL ONBOARDING TASKS FOR A NEW HIRE

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.

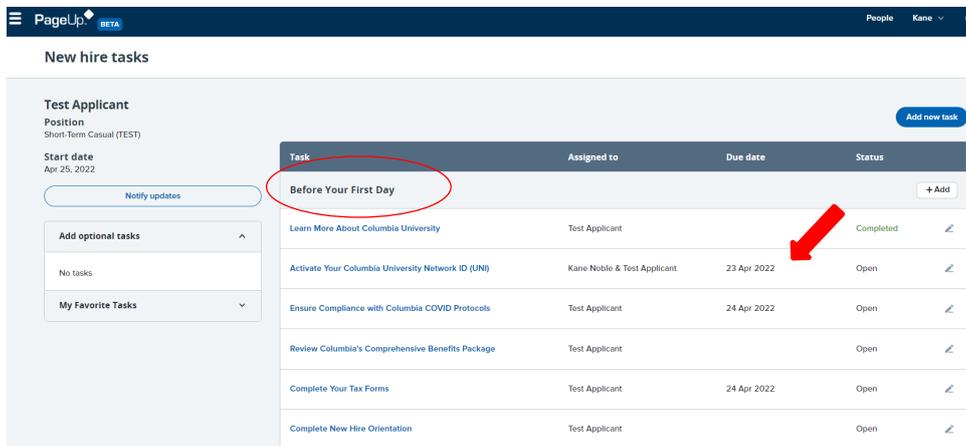
1. New hires dashboard:



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.

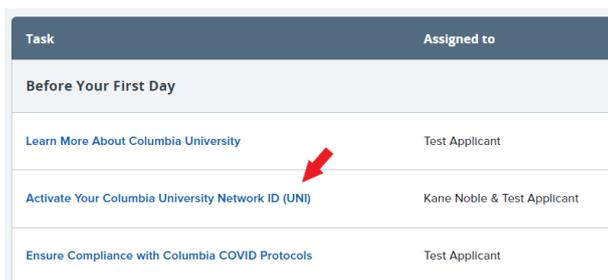


3. Each task is allocated to a group (e.g., Before your first day) and assigned to the new hire, onboarding task team member, or both. If applicable, the task due date will display in the dashboard and the task status (e.g., open, completed, overdue).

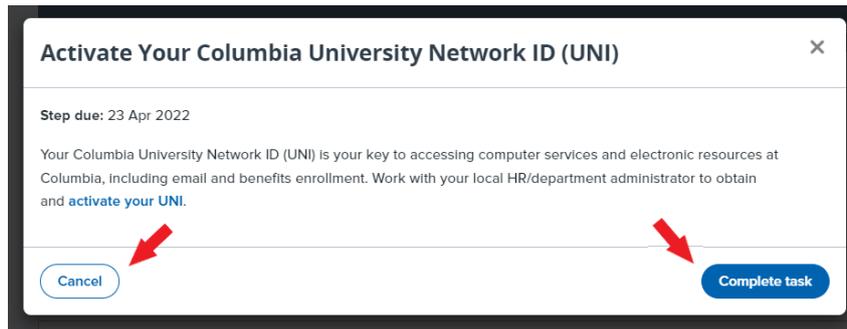


VIEW AND COMPLETE A TASK

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



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.

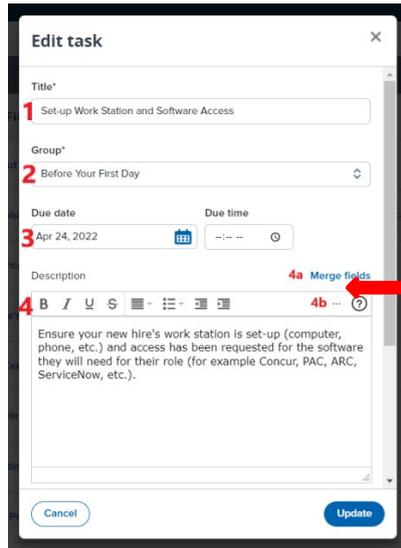
EDIT A TASK

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

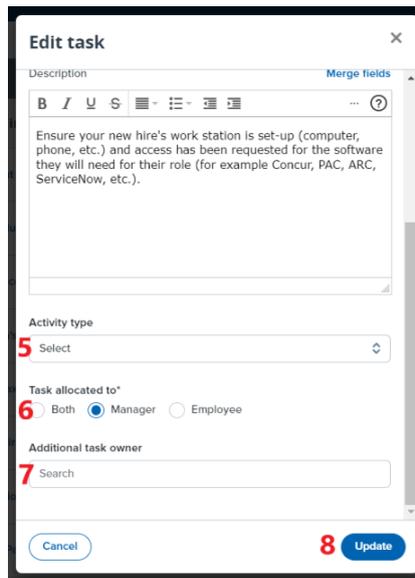
Task	Assigned to	Due date	Status	
Before Your First Day				+ Add
Learn More About Columbia University	Test Applicant		Completed	✎
Activate Your Columbia University Network ID (UNI)	Kane Noble & Test Applicant	23 Apr 2022	Open	✎
Ensure Compliance with Columbia COVID Protocols	Test Applicant	24 Apr 2022	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	✎
Initiate I-9 Form Part I	Test Applicant	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 (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.



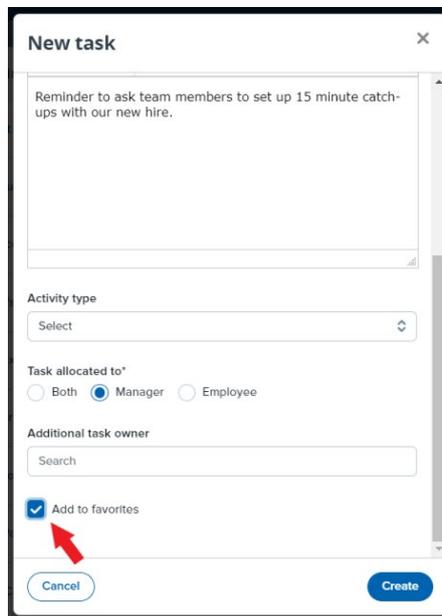
ADD A NEW TASK

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
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 ↗

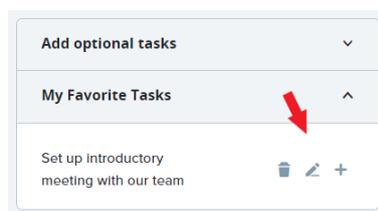
Complete the task details (please use the 'edit task' screenshots above as a visual reference):

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.



MY FAVORITE TASKS

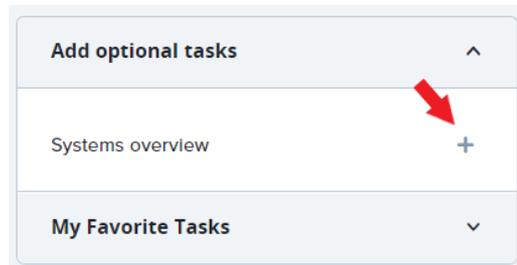
1. New tasks that you create and add as a favorite will be available under the 'my favorite tasks' section for quick reference and to add the task to other new hires in the future.
2. Editing a favorite task will not retroactively update favorite tasks already added to a new hire's task list.
3. Using 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

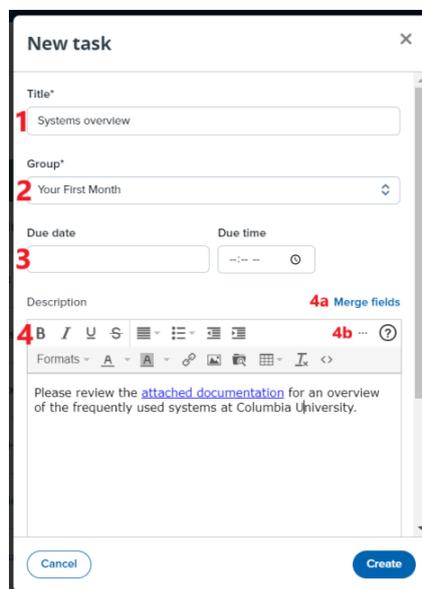
Optional Tasks are managed by CU Human Resources. If Optional tasks are listed, you can add them to your new hire’s task list if applicable, in the ‘add optional tasks’ section of the dashboard.

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:



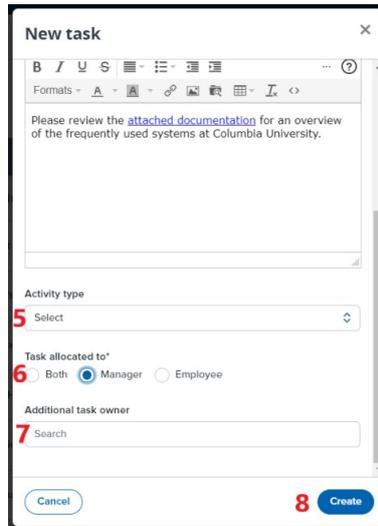
A pop-up will open with the pre-defined task details. On this screen, you can:

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.



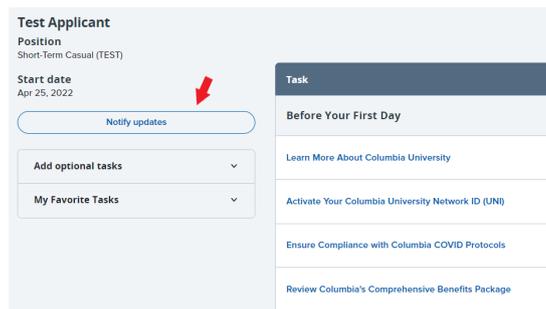
5. Please disregard the activity type field
6. Update to whom the task will be allocated to
7. If you select ‘manager’ as the assignee, you have the option to assign the task to another user. The assigned task owner will receive an email notification informing them that an onboarding task has been assigned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

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

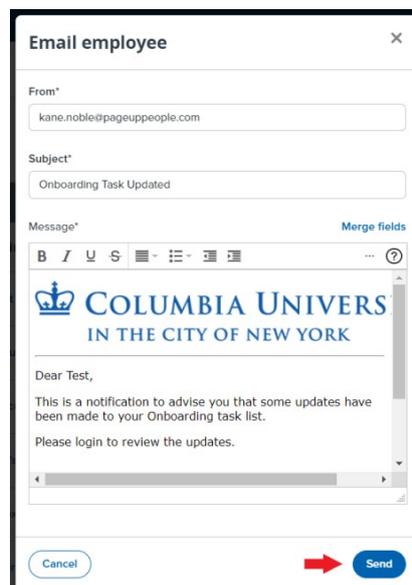


NOTIFY NEW HIRE OF UPDATES

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:



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.

ONBOARDING

New Hire Form:*

Onboarding Workflow:

Onboarding Delegate:

Reports to manager:*

Reports to Manager Business Title:*

OFFER PROGRESS

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)