Make Online Offer

🛑 *Note:* **Offer approval is required before moving forward with making an online offer.**

Step 1:   Select **Jobs have applicants for review** (*Update Applicant Status* dashboard tile)

Step 2:   Click **View Applicants** for applicable Search #

Step 3:   Select the Overall Rating outcome – *Make Online Offer*, and click **Submit**

Step 4:   Applicant will **Accept**/**Decline** offer online and initiator is notified

Step 5:   Update onboarding tasks as needed

⚠️ *Note:* Data automatically creates Regular Payroll SmartHR and no SmartHR entry by department is needed for regular payroll hires (Special Payroll hires populate SmartHR and require additional entry by the department)

View/Print Accepted Offer

⚠️ *Note:* Chosen candidate accepts the offer online and does not return a signed offer letter

Step 1: Select **View My Searches/View My Team Searches** (*View Searches* dashboard tile)

Step 2: Click **Review Applications** (far right) for the applicable search #

Step 3: Click chosen candidate's name

Step 4: Click hyperlink text below *Offer* label (actual text changes as the offer progresses through the workflow)

Step 5: Scroll to *Offer Progress* section of hire request

Step 6: Applicable fields will be automatically updated by the system (yes and date offer accepted)

Step 7: Print offer request or screenshot offer progress section

Onboarding

Access to onboarding is entered when creating the hire request (*Steps 12 & 13*). Names entered into the following fields on the hire request are granted access to onboarding: Immediate Supervisor, Search Initiator/Onboarding Access, Onboarding Coordinator, and Onboarding Delegate.

View/Update Tasks for New Hires

Step 1: Select **New Hires** (*Approve Offers and Manage Onboarding* dashboard tile*)*

Step 2: Click **View All Tasks** to the right of new hire row

Step 3: View tasks and whom they are assigned to, due date, and completion status

Step 4: Click the task name to view details and/or update status to completed

Step 5: Click the trash can icon as needed, to eliminate tasks as needed (mandatory tasks cannot be removed and the icon does not display)

Add New Task to Onboarding Task List

Step 1: Select **New Hires** (*Approve Offers and Manage Onboarding* dashboard tile*)*

Step 2: Click **View All Tasks** to the right of new hire row

Step 3: Click **Add new task** button located above top right of task list or click + Add at each group/timeline section

Step 4: Add new task details including Title, Group (timeline section e.g. Prior to first day, first week, etc.), Due date, Due time, Description, Activity Type, Task Allocated to, and Add to Favorites
Note: Add to Favorites checkbox saves the task details to be reused and added to future new hires

Step 5: Click **Create** button

Step 6: View new task on the task list and on left under **My Favorite Tasks**

Step 7: (Optional) Click **Notify updates** to create an update notification to advise new employee of new tasks to complete, and click **Send**

Add Optional Tasks or My Favorite Tasks to Task List

Step 1: Select **New Hires** (*Approve Offers and Manage Onboarding* dashboard tile*)*
Step 2: Click **View All Tasks** to the right of new hire row
Step 3: Click the plus sign (+) for the applicable task
Step 4: Update Tasks details as needed
Step 5: Click **Create** button
Step 6: View new tasks on the task list
> *Note:* To update the location on timeline (e.g. First Day, Following Orientation, etc.), edit task and update the **Group*** field.

Filter Open Tasks by Employee/Task

Step 1: Select **Current Onboarding Tasks** (*Approve Offers and Manage Onboarding* dashboard tile*)*
Step 2: Select Employee name(s) or Task(s)
Step 3: Click **Search**
Step 4: Click **Clear** to remove current filter and view all open tasks for all employees
Step 5: Bulk Complete open tasks by checking the **Title** check box (on left) for applicable tasks/employees and click **Bulk Complete** (top of page)
> *Note:* Tasks remove from **My Onboarding Tasks** list when completed and remain on **New Hires** onboarding task list
Step 6: Click **View all tasks** to view all tasks for the specific employee (return to New Hires task list)