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** (far right) for applicable Search #
Step 3: Select the *Overall Rating* outcome – change from *Ready for Dept* to *Make Offer* to *Make Online Offer*
Step 4: Click **Submit**
Step 5: Applicant will **Accept**/**Decline** offer online and initiator is notified (Update onboarding tasks as needed and complete the hire in SmartHR)

Note: Special Payroll data populates the new SmartHR templates and requires additional entry by the department. **New SP templates:** UC_PG_SPT, UC_PG_SPNT, UC_PG_SPNTS
(Regular Payroll automatically creates the SmartHR and no entry is required 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)