HR Contact New Employee Onboarding Guidebook

This document contains job aids that outline the process for HR Contacts to assign/view onboarding tasks and the Contact Log in PeopleAdmin for Staff and Faculty.

This document also outlines the process for College, Division, and Campus level HR Contacts to view the onboarding summary for their new employees in HCM PeopleSoft.

NOTE: Access to view the onboarding summary is not available to Department HR Contacts.

You may click on the sections below to jump to their location in the document.

To access PeopleAdmin, navigate to https://uscjobs.sc.edu.

To access Employee Self Service in HCM PeopleSoft, navigate to https://hcm.ps.sc.edu. Click the drop-down menu from the Employe Self Service title, then select Employee Self Service.

NOTE: *International Staff and International Faculty checklists are assigned system-wide by the Office of International Services.*

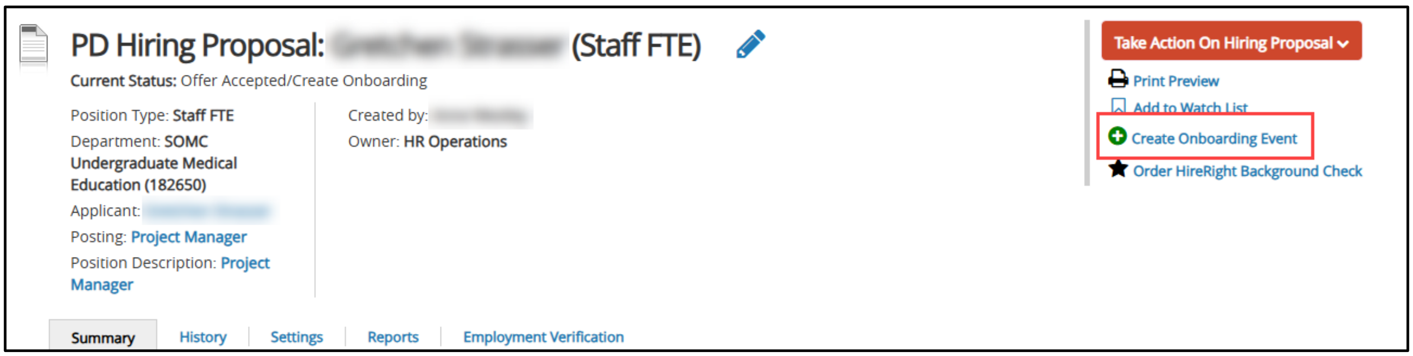
HR Contact: Assign & View Onboarding in PeopleAdmin

This job aid also outlines the process for HR Contacts to Assign and View Onboarding Events in PeopleAdmin and access the Contact Log. Onboarding Events *must* be assigned for new hires or rehires (greater than 1 year). Onboarding is assigned when the Hiring Proposal reaches the *Offer Accepted/Create Onboarding* workflow status.

NOTE: DO NOT assign onboarding events for the following types of hires: rehires (*less* than 1 year), promotion, demotion, transfer, or reassignment.

How to Assign Staff Onboarding in PeopleAdmin

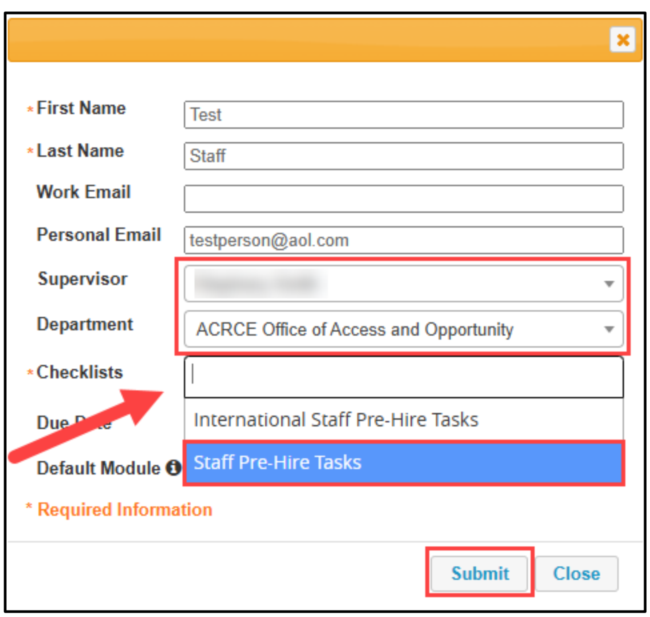
1) Once the hiring proposal for your new hire or rehire (greater than 1 year) is at the workflow status of *Offer Accepted/Create Onboarding* click **Create Onboarding Event**.



2) Confirm that the new employee's name and personal email are accurate. Select the **Supervisor** and **Department** from the drop-down menus. Click the **Checklists** drop-down menu and select **Staff Pre-Hire Tasks**. A due date is not required.

Never assign International Staff Pre-Hire Tasks. HR OIS will assign International Pre-Hire tasks.

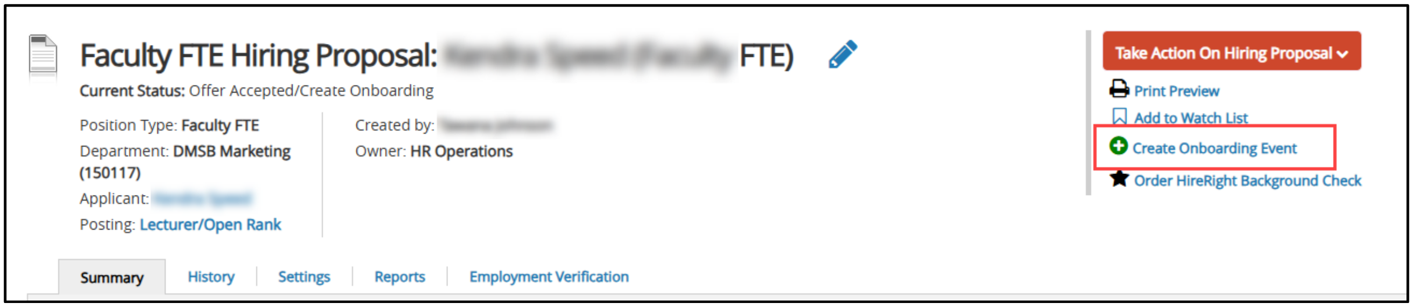
Click the **Submit** button.



Once submitted, you will see a light blue banner at the top of your screen indicating that the task has been assigned.

How to Assign Faculty Onboarding in PeopleAdmin

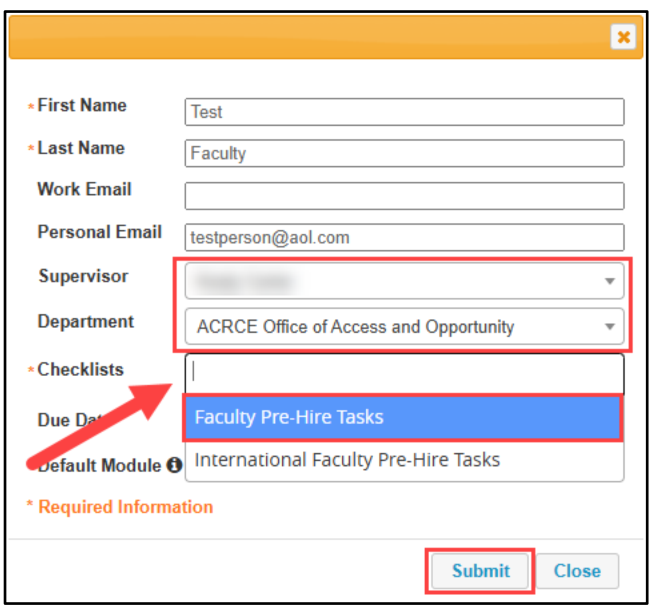
1) Once the hiring proposal for your new hire or rehire (greater than 1 year) is at the workflow status of *Offer Accepted/Create Onboarding* click **Create Onboarding Event**.



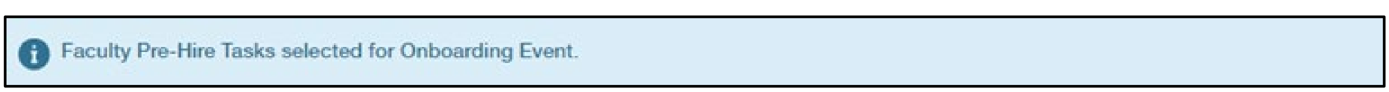
2) Confirm that the new employee's name and personal email are accurate. Select the **Supervisor** and **Department** from the drop-down menus. Click the **Checklists** drop-down menu and select **Faculty Pre-Hire Tasks**. A due date is not required.

Never assign International Faculty Pre-Hire Tasks. HR OIS will assign International Pre-Hire tasks.

Click the **Submit** button.

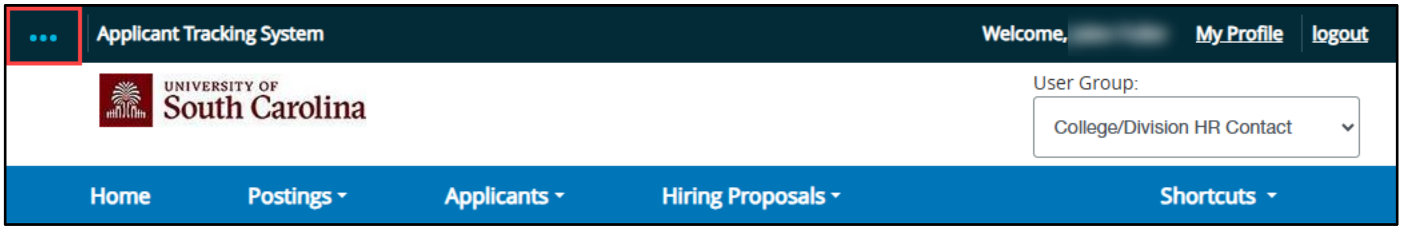


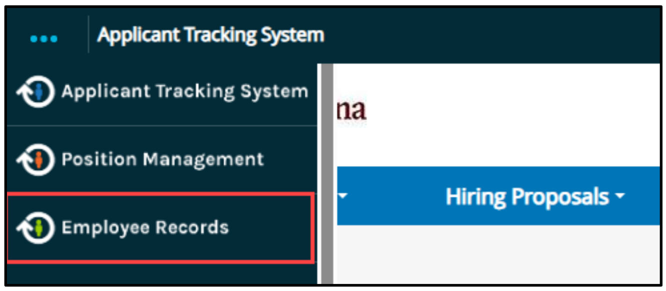
Once submitted, you will receive a light blue banner at the top of your screen indicating that the task has been assigned.



Viewing Onboarding Task Status in PeopleAdmin Records

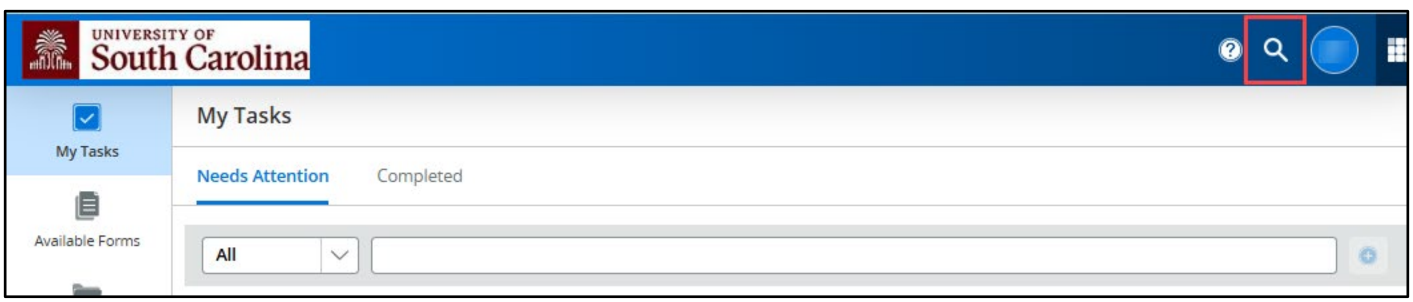
1) To view the status of onboarding for your new employees, navigate to Employee Records. On the PeopleAdmin homepage, click the three dots in the top left corner. Then select **Employee Records**.



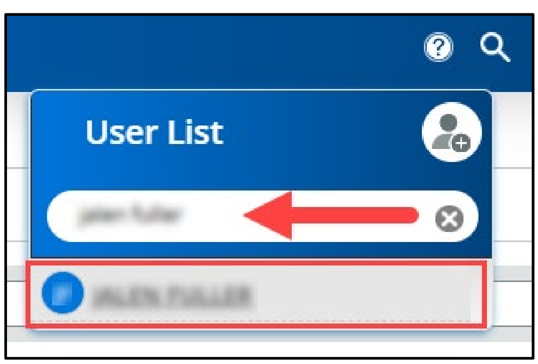


NOTE: This will open in a new tab within your browser.

In PeopleAdmin Employee Records, the default view is for you as an employee. To access a new employee's onboarding tasks click the magnifying glass icon at the top right.



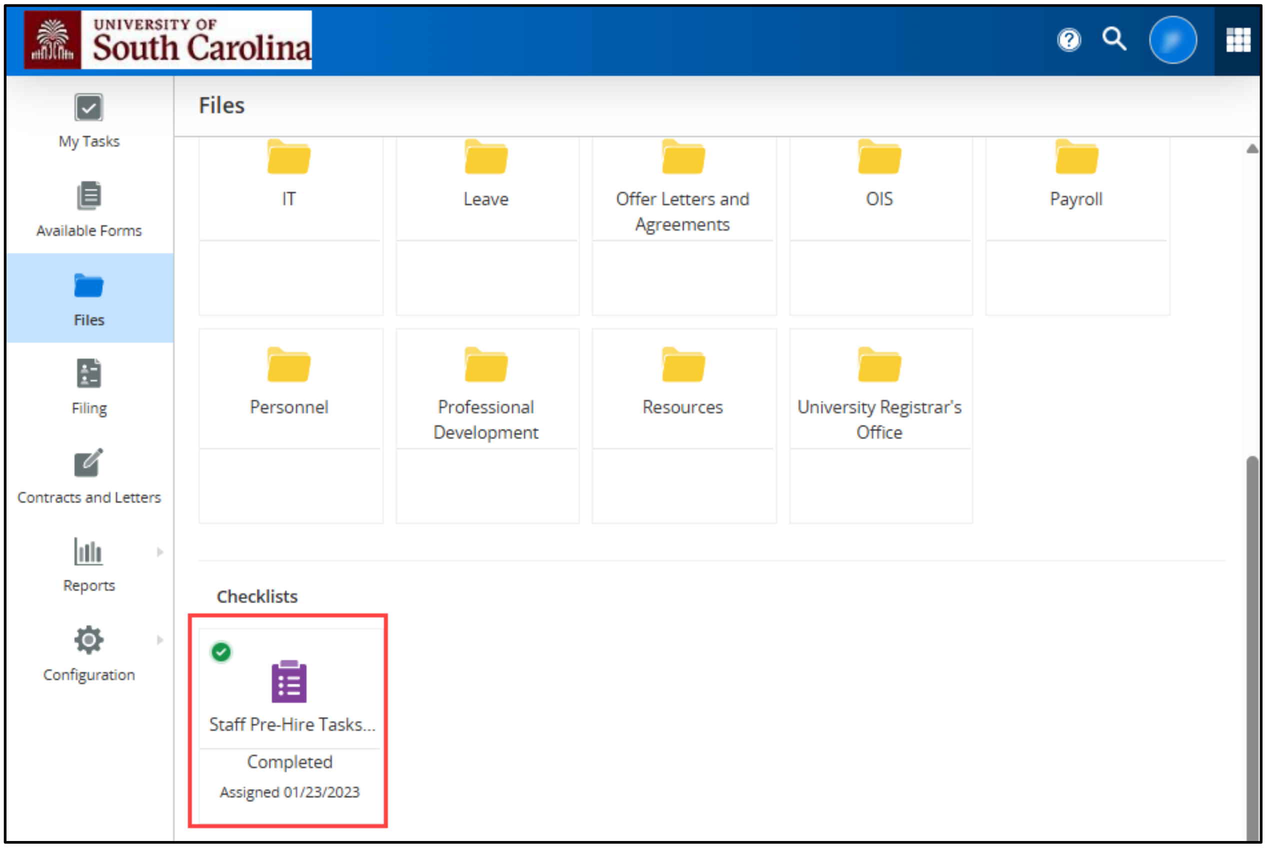
2) Type the employee's name in the **User List** search box that appears and then click the appropriate individual from the list. In the example below, we will view a staff member.



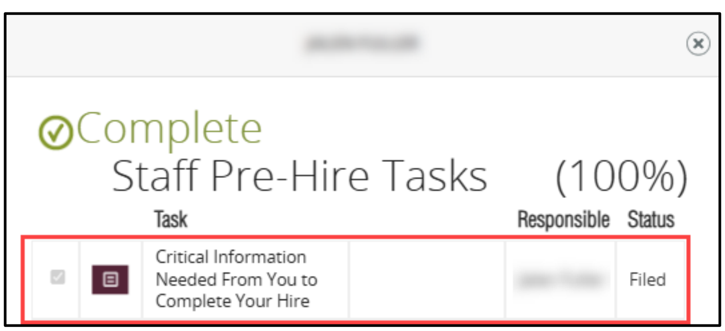
3) Only one Checklist will appear, as assigned by an HR Contact or HR OIS. The options are:

- Staff Pre-Hire Tasks
- International Staff Pre-Hire Task
- Faculty Pre-Hire Tasks
- International Faculty Pre-Hire Task

Click on the **Staff Pre-Hire Tasks** to view the status.

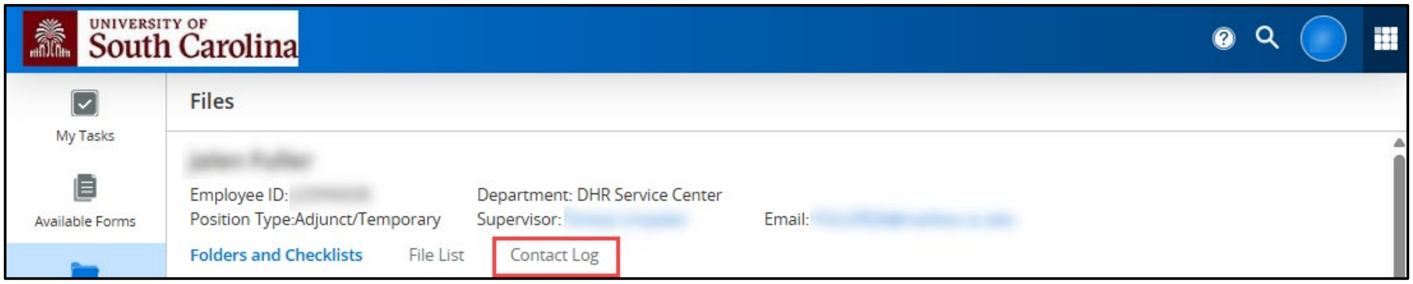


4) Quickly reference the status of each task within this checklist by reviewing the **Status** column. The **Responsible** individual is the new employee. You can click any of the tasks to review the information.



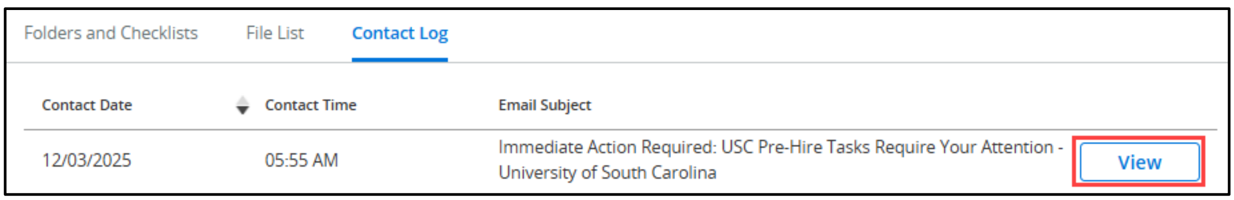
Viewing the Contact Log

1) Click on the **Contact Log** header to view all automated system communications that have been sent to the employee.

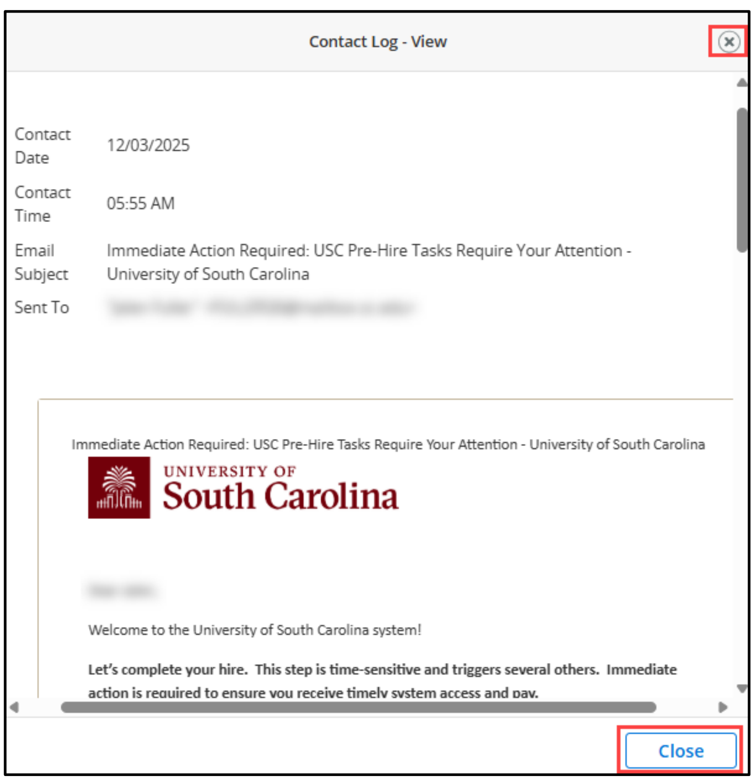


The Contact Log will display 10 results per page (if applicable). If the individual takes action upon receipt of initial email, no additional communication occurs. However, if the individual does not take action timely the system will send automatic reminders.

Click the **View** button next to the communication you wish to review.



2) The Contact Log View presents the entire email that was sent to the employee, including all clickable links. Scroll to see the entire communication. Click the **X** in the top right, or the **Close** button at the bottom once you've finished your review.



Reminder, PeopleAdmin Pre-Hire Tasks are step one in the Onboarding The new employee must also complete a separate set of tasks in HCM PeopleSoft. Please refer to one of the Onboarding job aids for *New Employees* on the Division of Human Resources' website:

https://sc.edu/about/offices_and_divisions/human_resources/careers/new_employee/tips_and_guides/index.php

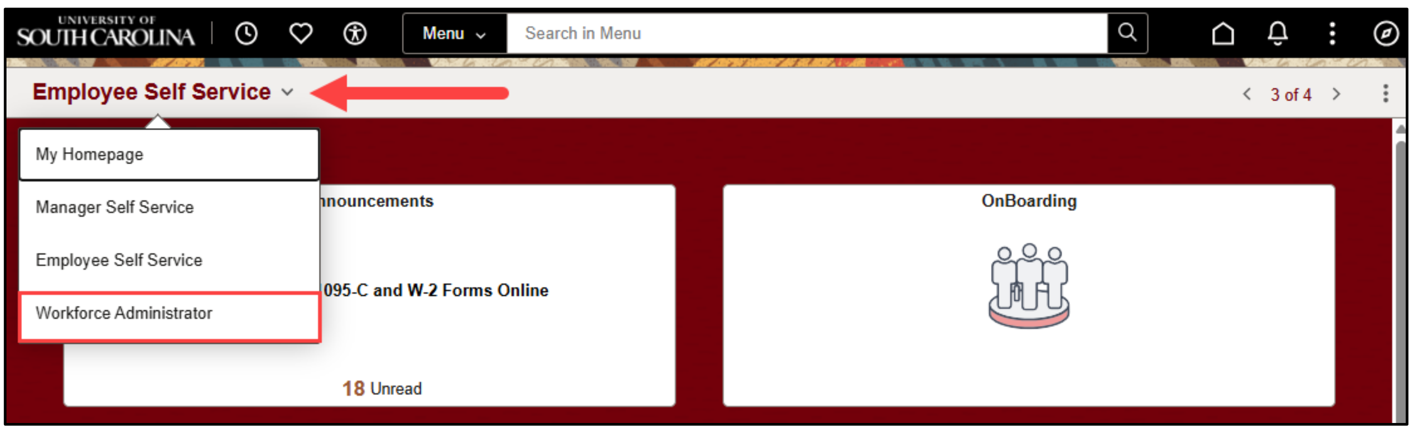
Congratulations! You have successfully assigned and viewed new employee onboarding and accessed the contact log in PeopleAdmin!

HR Contact: View Employee Onboarding Summary in HCM

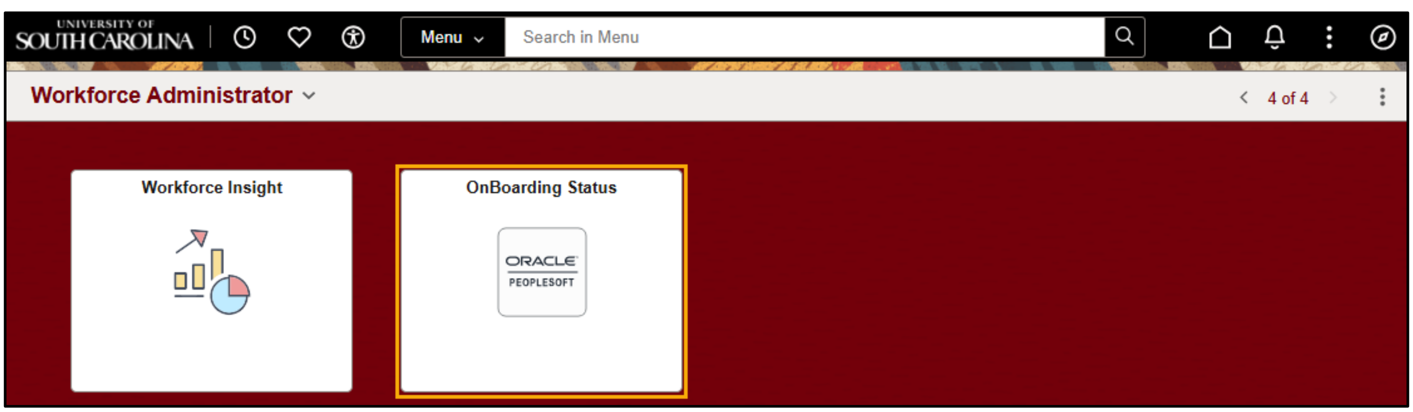
This job aid also outlines the process for College, Division, and Campus level HR Contacts to view the onboarding summary for their new employees in HCM PeopleSoft. You can access Employee Self Service by clicking **here**.

Employees are assigned the following tasks in OnBoarding: My OnBoarding Assistant, Direct Deposits, W4 Tax Withholdings, Technology Use Agreement, Document Acknowledgement, Personal Details, Benefits Information, Security Awareness, Entering Working Hours and Leave, and the Overall Summary. There are also instructional pages for PreBoarding and OnBoarding. To view which tasks a new employee has been assigned and/or completed, take the following steps:

1) On the Employee Self Service Landing page, click the **Employee Self Service** drop-down menu button. Click the **Workforce Administrator** option.



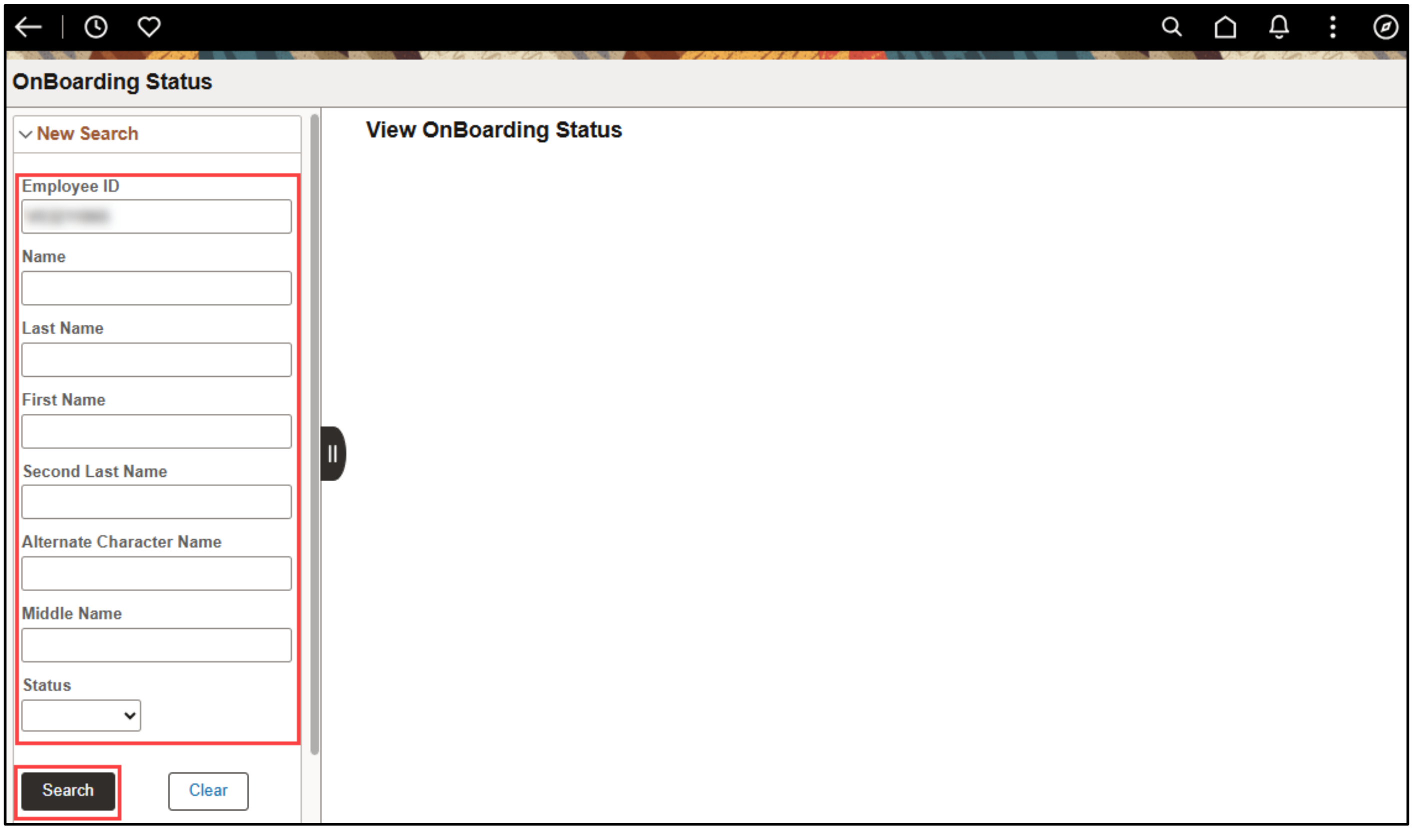
2) Click the **OnBoarding Status** tile to begin.



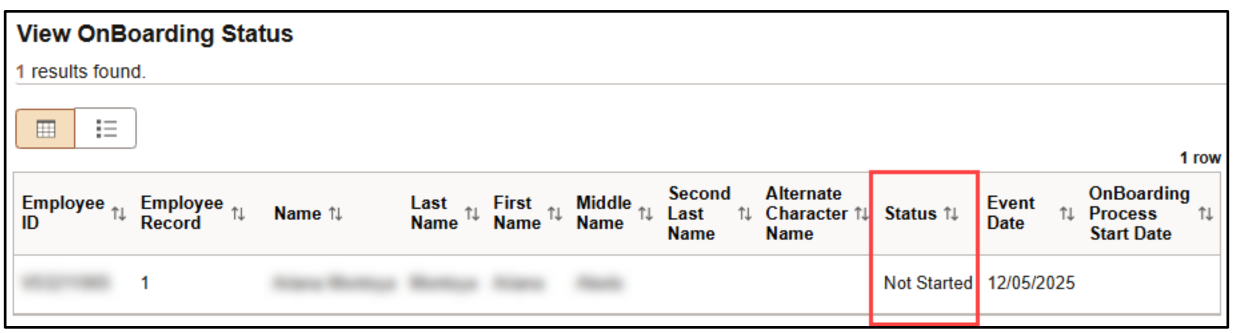
3) On the View **Onboarding Status** page, you *must* enter search criteria to see employees within your area. You can search for employees by their USC ID or name, and filter by onboarding status. Once you have entered your criteria entered, click the **Search** button.

In the example below, we are searching for a specific employee by Employee ID (USC ID).

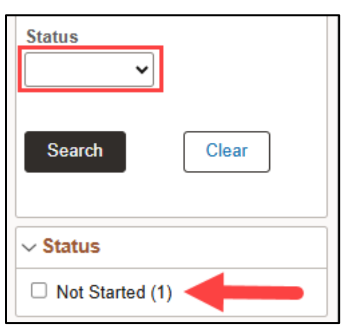
(Screenshot on following page)



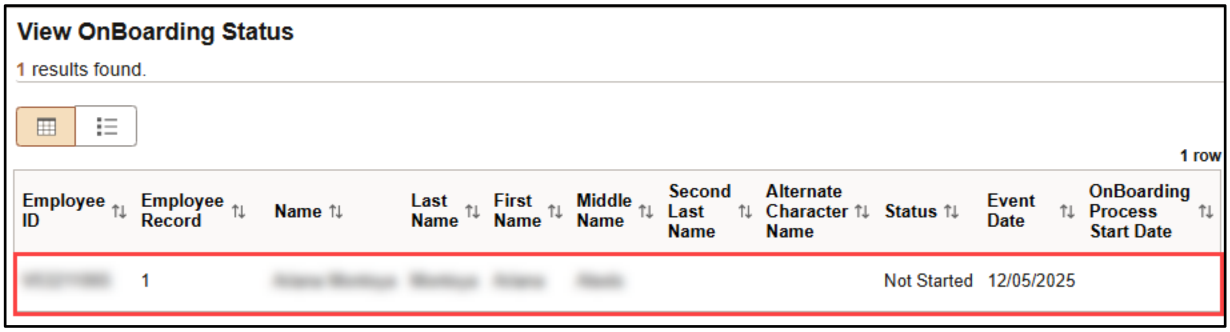
4) The results of your search will be displayed within the page. You can quickly determine the OnBoarding status of your new employee(s) by looking at the **Status** column in the search results.



You can filter your search results for a specific status by using the options located in the left hand menu.



5) To view the OnBoarding Summary for the new employee, click anywhere within the employee's search result row.



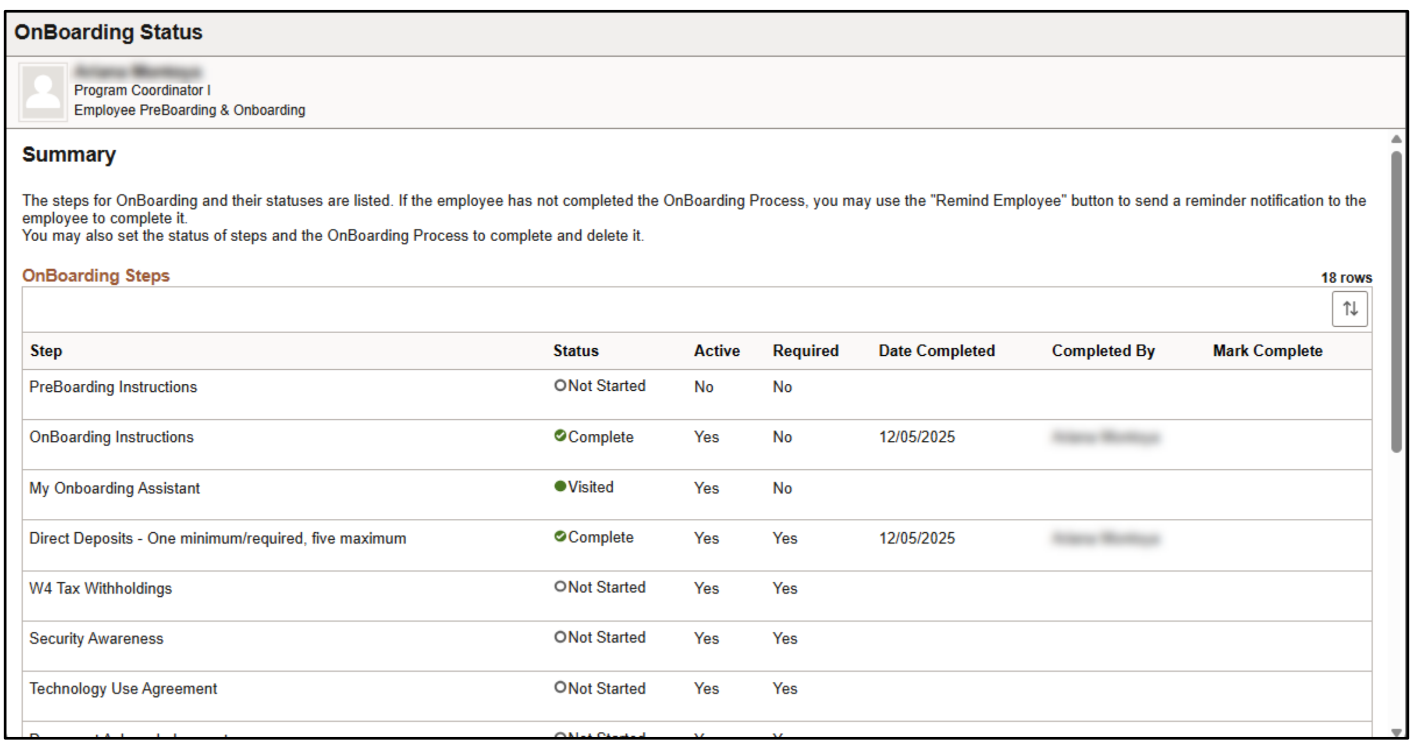
6) The OnBoarding Summary will display all OnBoarding steps for a new employee and display the status, Date Completed, and if the step is required.

You can quickly reference the **Status** column to see:

- Not Started
- In progress
- Complete (steps will not appear as complete until the employee clicks the **Mark Complete** button.)

NOTE: The onboarding steps shown are the same for all new hires regardless of employee type (*excluding student employees*).

If a new employee has not started certain tasks or has incomplete tasks, their manager can remind them to complete their onboarding by sending a system generated email from within Manager Self Service.



7) Once an employee has completed their OnBoarding tasks, their **OnBoarding Status** summary page will display all steps marked as *Complete*.

OnBoarding Status

[illegible]
Program Coordinator I
Employee PreBoarding & Onboarding

OnBoarding Steps

Step	Status	Active	Required	Date Completed	Completed By
PreBoarding Instructions	Not Started	No	No		
OnBoarding Instructions	Complete	Yes	No	12/05/2025	[illegible]
My Onboarding Assistant	Visited	Yes	No		
Direct Deposits - One minimum/required, five maximum	Complete	Yes	Yes	12/05/2025	[illegible]
W4 Tax Withholdings	Complete	Yes	Yes	12/05/2025	[illegible]
Security Awareness	Complete	Yes	Yes	12/05/2025	[illegible]
Technology Use Agreement	Complete	Yes	Yes	12/05/2025	[illegible]
Document Acknowledgement	Complete	Yes	Yes	12/05/2025	[illegible]
Verify Addresses	Complete	Yes	Yes	12/05/2025	[illegible]
Emergency Contacts	Complete	Yes	Yes	12/05/2025	[illegible]
Degrees	Complete	Yes	Yes	12/05/2025	[illegible]
Ethnic Groups	Complete	Yes	Yes	12/05/2025	[illegible]
Veteran Status	Complete	Yes	Yes	12/05/2025	[illegible]
Disability	Complete	Yes	Yes	12/05/2025	[illegible]
Benefit Information	Complete	Yes	Yes	12/05/2025	[illegible]
Entering Working Hours and Leave	Complete	Yes	Yes	12/05/2025	[illegible]
Before Day 1 Checklist	Not Started	Yes	Yes		
Manager Checklist - Day 1 and After	Not Started	Yes	Yes		

NOTE: This screenshot shows all tasks that a new employee is assigned for OnBoarding. The Before Day 1 Checklist and Manager Checklist are assigned to the employee's supervisor.

Congratulations! You have successfully viewed the onboarding status of a new employee in HCM!