

Quick Start Guide

Onboarding

Onboarding refers to the activities that relate to the hiring of an applicant and the assignment of tasks for them to complete. These tasks usually include the review and/or completion of certain documents required for employment. The documents can simply present information to the applicant (company benefits explanations or holiday schedules), or be used to gather information from the applicant (tax forms, emergency contacts, and other such forms). Onboarding allows users of symplr Recruiting to track the progress of tasks and status of documents, approve them once reviewed, and complete the hiring process with the applicant.

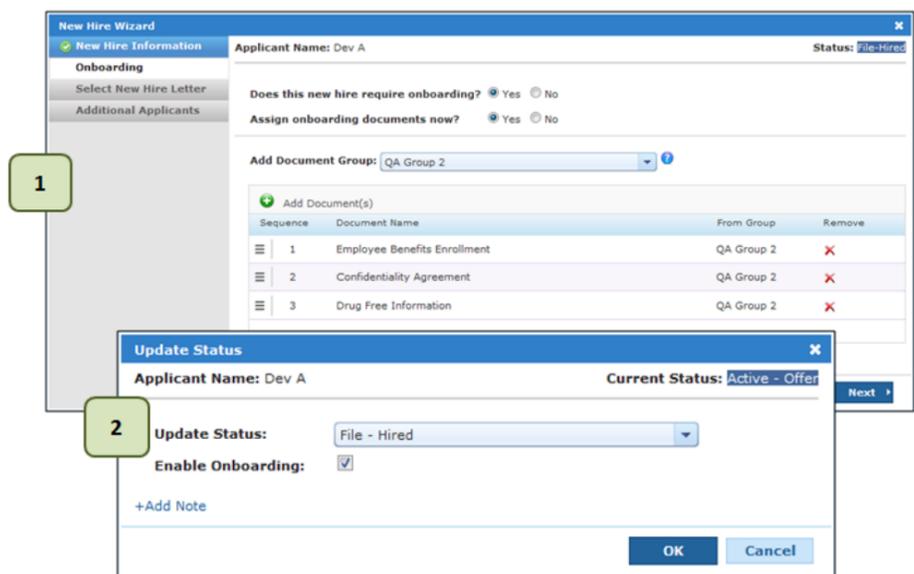
Initiating Onboarding

The first steps for onboarding are flagging an applicant that requires onboarding and deciding which tasks and/or documents need to be assigned to that applicant.

When you decide to initiate onboarding, it is not necessary to select which documents/tasks to assign to the applicant at that time – this can be done at a later date, even by other users. Assigning a document automatically initiates a task for the applicant to review and/or complete that document.

There are two main ways to initiate onboarding:

1. **New Hire Wizard.** The New Hire Wizard contains an **Onboarding** step that allows you to indicate onboarding is needed for the applicant and assign the necessary documents – all in a single step. This wizard can be launched by selecting the **Hire Applicant** option from the **Take Action** menu on the *Applicant Details* page.
2. **Update Status.**



The image shows two overlapping windows from the symplr Recruiting interface. The top window is the 'New Hire Wizard' for 'Applicant Name: Dev A'. It has a 'Status: File-Hired' indicator. The 'Onboarding' section is active, with 'Does this new hire require onboarding?' set to 'Yes' and 'Assign onboarding documents now?' also set to 'Yes'. A document group 'QA Group 2' is selected. Below this is a table of documents to be assigned:

Sequence	Document Name	From Group	Remove
1	Employee Benefits Enrollment	QA Group 2	X
2	Confidentiality Agreement	QA Group 2	X
3	Drug Free Information	QA Group 2	X

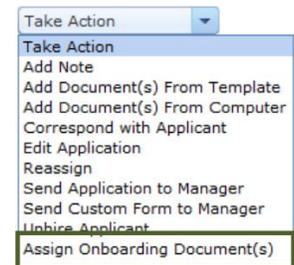
The bottom window is the 'Update Status' pop-up for 'Applicant Name: Dev A'. The 'Current Status' is 'Active - Offer'. The 'Update Status' dropdown is set to 'File - Hired', and the 'Enable Onboarding' checkbox is checked. There is a '+Add Note' field and 'OK' and 'Cancel' buttons.

Onboarding can also be initiated by updating the status of an applicant to **File – Hired**. When this is selected as a status, you are presented with the option to **Enable Onboarding** in the pop-up window. Checking this option indicates onboarding is necessary, though you will not be able to assign documents at this time.

Assigning Onboarding Documents

Clicking the **Finish** button completes the hiring process. A window opens that shows the progress of any actions taken against additional applications and/or applicants. Closing the window takes you back to the *Applicant Detail* page.

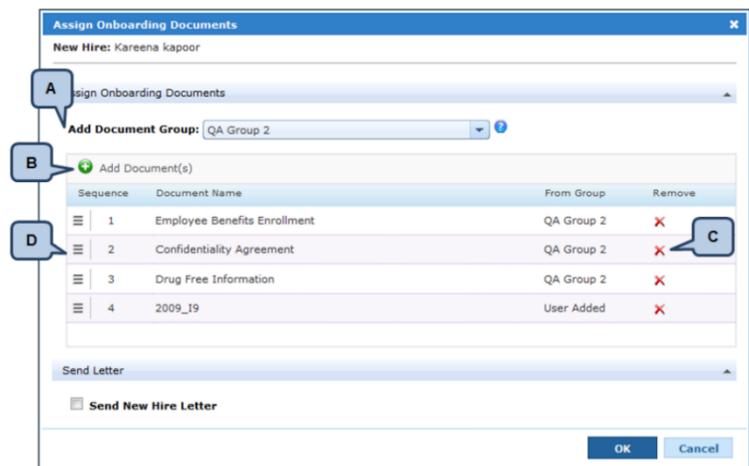
After you have indicated that an applicant requires onboarding, you can assign tasks or documents to the applicant for their review and/or completion. Assigned documents appear to the applicant from their profile page on the career site (under **My Tasks**), where they are able to view, complete, and submit any necessary documents and forms.



As mentioned, assigning these documents can take place directly from the **Onboarding** step of the New Hire Wizard. However, you can also assign documents by selecting the *Assign Onboarding Documents* option from the **Take Action** menu on the *Applicant Details* page.

Regardless of the method used, the resulting pop-up window contains the same options for assigning documents. These options allow you to assign documents individually or by groups.

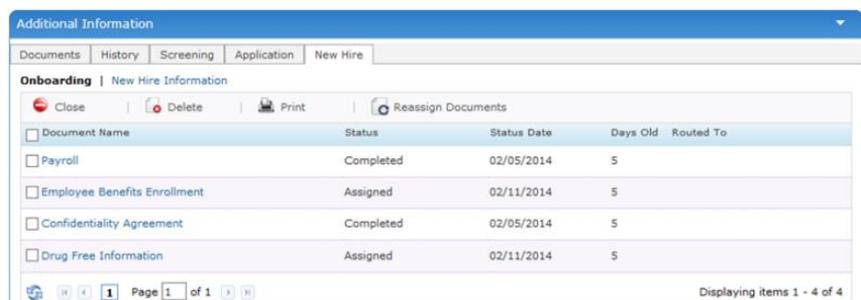
- Using the **Add Document Group** drop-down menu adds all documents in the selected group to the document table.
- You can also add individual documents, even if they are in other groups, by clicking the **Add Document(s)** button and selecting the individual documents you wish to include.
- Need to remove a document from the list? Just click the **Remove** icon (X) in the table.
- You can also change the order in which the documents appear to the new hire using the first column in the table to drag-and-drop a document to a new position.



Reviewing Onboarding Documents

Once documents have been assigned to an applicant, you may view the documents at any point by visiting the **New Hire** tab located in the **Additional Information** section of the *Applicant Detail* page.

This table provides the ability to view documents by selecting the link under the **Document Name** column, mark documents as **Closed** (if the applicant has completed necessary forms), reassign documents back to the applicant for further review or completion, and delete documents or print selected documents as well.



Onboarding: The Applicant Experience

This section of the guide describes the onboarding process and completion of onboarding tasks as experienced by the applicant. This is meant as a reference for symplr Recruiting users.

When onboarding documents are assigned to an applicant, they appear under the **My Tasks** area of the *New Hire Home* page on their career site profile. These tasks are the documents that must be reviewed, completed, and submitted to the HR department by the applicant.

An email notification is sent to applicants when onboarding documents have been assigned. This email contains a link that opens the *New Hire Home* page after logging in to the career site. From there, completing onboarding documents is a simple process:

1. From the **My Tasks** area on the *New Hire Home* page, click the name of a document to review. The document opens in a new browser window.

2. Complete the required fields in the document. In most cases, required fields are marked in red on the form.

Note: Some form fields can be prepopulated based on information submitted with applications.

3. When the necessary fields have been completed, click the **Send to HR** button at the bottom of the form.

Documents that are sent to HR are considered complete. The status of these documents is displayed as **Completed** for both the applicant

and users in symplr Recruiting. Though applicants can view completed documents in their **My Tasks** list, they are not able to make further edits to those documents.

The screenshot shows the 'My Account' page with a 'My Tasks' table. The table lists tasks with their status: '2013 W4' (Completed), '2013 I-9' (Not Started), and 'Confidentiality Statement' (Not Started). A callout '1' points to the 'Confidentiality Statement' task. Below the table, a form titled 'SYSTEMS ACCESS/ELECTRONIC SIGNATURE' is shown. The form contains text about system access and consequences. Fields for 'Employee Name' (Jane Foster), 'Employee Social Security Number' (XXX-XX-XXXX), and 'Date' (3/18/14) are prepopulated. A callout '2' points to the 'Employee Name' field. At the bottom of the form, there are 'Save for Later' and 'Send to HR' buttons. A callout '3' points to the 'Send to HR' button.

Additional Notes

A couple more items to consider when working with onboarding tasks are listed below.

- Completing PDF forms requires the latest version of Adobe Acrobat. Career sites perform system checks to make sure the latest version is available and prompts the user to upgrade if not. Forms cannot be completed and submitted unless the most recent version of Adobe Acrobat is available.

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- Applicants are able to save their progress on documents without submitting a final version using the **Save as Draft** button located on the bottom of forms. When a draft is saved, the status of the document is updated to **Started** for both applicants and recruiters. Applicants can re-open these documents to complete and submit them to HR at any point.

My Tasks	
Task	Status
2013 W4	Completed
2013 I-9	Not Started
Confidentiality Statement	Started
EEO Data	Not Started
Hospital Identification Card	Not Started