How to Monitor the Onboarding Progress of Your New Hire

This document will provided step by step instructions on the following *(click on a link to advance)***:**

- **How the hiring manager will monitor the onboard progress of the new hire.**
- **The onboard view from the new hire's view (how to complete the onboard forms).**

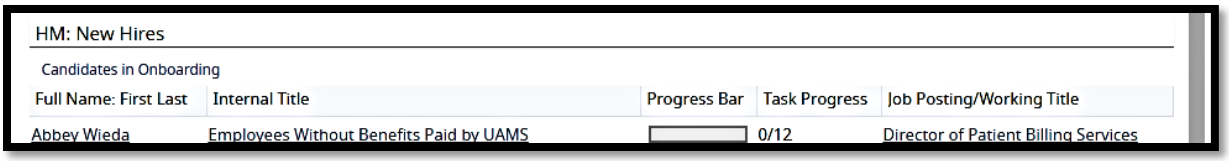
Onboard

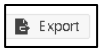
The process of onboarding a new hire will be performed Human Resources, these instructions can be found in the My Compass Human Resources Onboarding a New Hire Training Manual

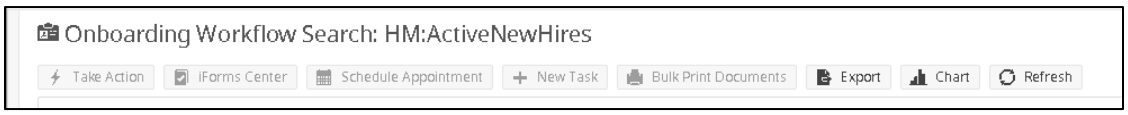
TRACK ONBOARDING (New Employee Orientation) PROGRESS

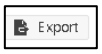
Now that the new hire has been onboarded the hiring manager should monitor the progress of the new hire.

In the bottom left corner of your dashboard below HM: New Hires see link for "Candidates in Onboarding"



- Here you will find a list of your new hires who have been sent onboarding task including a progress bar. Click "**more results**" for a complete list of your new hires who have been sent onboarding task
- Click on "Export" 



- From here select **"Excel**" on the drop down menu. Then click "**Export**" 

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- Click "**download"**, then click on the arrow on the document at the bottom of the Export box. Click "**open**"

If you would like to focus on a specific new hire click on the name.
Then click "**onboard status"**
Here you will be able to see the progress of completed tasks. If you click on the **progress bar** the list of tasks will expand. Here you will be able to see the task name and due dates.

Manager's Onboarding Tasks

The Manager will receive an email to complete the following tasks.

1. Employee Disclosure Form – cannot complete until after the new hire has completed his/her portion.
2. Cost Funding Form- Cost funding number and percent must equal 100%
3. Register your new hire for the required face to face PFCC/Infection Control/SEHS orientation (instructions provided on the email notification.

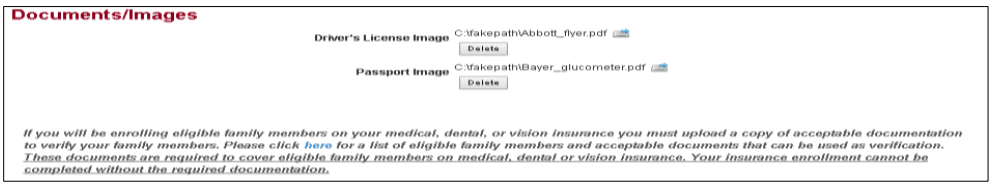
New Hire Onboarding Tasks

Once Human Resources has completed the onboarding process the new hire will receive an email directing them to the welcome aboard page where he/she will update their profile information and complete required onboarding tasks.

New Hire Instructions to Complete Onboarding Forms/Tasks

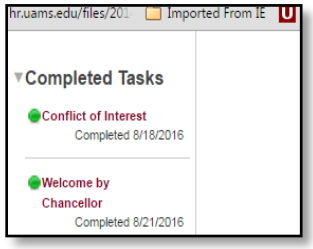
- The employee will be directed to his/her profile page. Fill in the required employee data. *Upload any dependent verification information if adding a spouse or child(ren) to medical, dental, or vision insurance. (scan and save the document on your desktop to upload)*
- Click "**save and continue**"

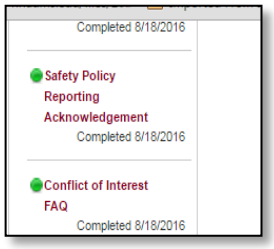
Please note: You will be unable to add a spouse or dependent child(ren) to your insurance if you are unable to upload the verification information. If you are unable to upload you can fax this information to 501-686-5386 or deliver to the Office of Human Resources Central Building 4C.



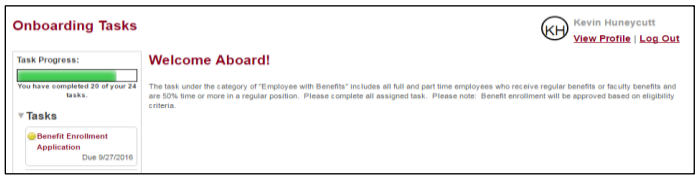
Once the profile is complete a "Welcome Aboard" screen will appear with a list of task for the new hire to complete. **The required tasks will be based on the new hire category so you may or may not have all the tasks shown below as required tasks.**

The new hire will be able to see a list of required task in order by due date.
Any completed task will be at the bottom.
Documents that the new hire will need later and the welcome note will be at the bottom of the screen.





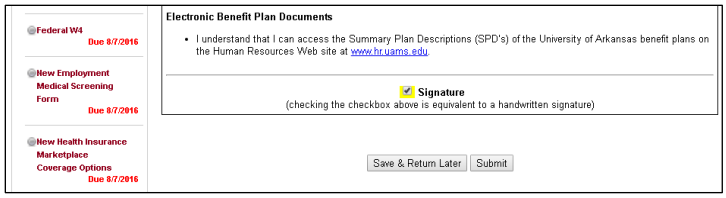
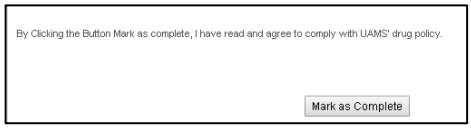
The new hire should click on the first task at the top of the task list to complete in order **by due date**. In this example, the first task is the benefits enrollment form.



Below is an example of the different types of forms required for an employee. Note: All forms have instructions.

- **Acknowledgement forms –** any forms labeled as acknowledgement should be read and electronically signed at the bottom.

- **iForm –** Any form listed as an iForm must be completed and electronically signed.



- **Statements** – some forms are statements and should be read in their entirety and marked as completed.