# How to complete onboarding tasks in HCM PeopleSoft as a new employee:

This job aid outlines the process for new employees to complete their first day and first week onboarding tasks in Employee Self-Service in the HCM PeopleSoft System. Note you will not be able to log into Employee Self-Service until your start date. [Employee Self-Service log in](#).

## Processing Steps

### Pre-Step: UofSC New Hire Onboarding Email.

Once your Hire action has been fully approved in the HR/Payroll system, you will receive an autogenerated email with a link to complete the next critical steps in your onboarding process.

Note you cannot access HCM PeopleSoft until your start date as listed on your offer letter.

**On your first day, you may receive an email that provides you a direct link into Onboarding. If so, you will skip steps 1 and 2 below.**

### Screenshots

---Original Message-----

**From:** [UofSC New Hire Onboarding Email](mailto:UofSC New Hire Onboarding Email)

**Sent:** Thursday, March 18, 2021 9:07 AM

**To:** [UofSC - New Hire Onboarding](mailto:UofSC - New Hire Onboarding)

**Subject:** UofSC - New Hire Onboarding

Dear Test Employee,

Good news! Your hire form has been successfully received and processed.

Once you reach your start date (which is your effective date of hire on your offer letter), you will have access to log into Employee Self-Service (ESS) below to complete the next critical steps in your onboarding process.


In the meantime, we encourage you to visit your campus website for new employee resources. Please do not hesitate to contact your supervisor or HR representative with any questions.

Welcome to the team!

UofSC Division of Human Resources
Step 1: On the main homepage, click the Employee Self Service drop-down menu button.

Step 2: Click the Onboarding option to start your onboarding tasks.

Step 3: Click the Onboarding Activities tile to begin.
Step 4: Completing Onboarding.

Onboarding is divided into the following four parts:
1. Welcome
2. First Day Tasks
3. First Week Tasks
4. Summary

Once you have completed the steps in each section of Onboarding, be sure to click the Mark Complete button in the top right corner.
Step 5: Welcome.

On the **Welcome** page click to view the message from UofSC President.

Don’t forget to **Mark Complete**!

**Step 5a: First Day Tasks – Direct Deposit(s).**

UofSC requires direct deposit for all employees. You can add up to three accounts.

Click the **Add Account** button.
Step 5b: First Day Tasks – Direct Deposit(s).

Complete all fields as shown in the screenshot. Once fields are complete click the green Save button in the top right corner.

Note you can list a Checking or Savings account, and the Deposit type has three options.
1. Amount
2. Percent
3. Remaining Balance (select this if only adding one account).

Upon hitting Save, you are taken to the Direct Deposit Summary page. Click the + to add another account. If no other accounts, click the Mark Complete button.
Step 6: First Day Tasks – Federal W4 and State of SC W4 forms

UofSC has created eForm versions of both the Federal and State of SC W4 forms. Please complete both of these forms as you would have on paper.

Be sure to click the **Submit** button at the bottom of both the Federal W4 and State of SC W4 form. Once you have submitted each form click the **Mark Complete** button in the top right corner before moving to the next task.
Step 7: First Day Tasks – Security Awareness Training

Complete this task by clicking the Security Awareness Training link and viewing 10 videos. The entire course should take about 30 minutes to complete.

Once you have viewed all 10 videos and passed the knowledge check quiz associated with each topic, return to this Onboarding task and click the box attesting to viewing all videos. Click the green Save button. Note on this page, by clicking the Save button you are also Marking Complete.
Step 8: First Day Tasks – Required Acknowledgements

Complete this task by clicking the four Download buttons to access each of the documents listed in Step 1. Once you have read each of the documents you can then click the corresponding Acknowledge button in Step 2.

Note the Acknowledge buttons will not appear as clickable options until you have downloaded the related document in Step 1.

The Employee Standards of Ethical Conduct document contains vital information about what it means to be a Carolinian including links to policies on topics of Equal Opportunity, handling of student records and personnel files, financial integrity, and campus safety.

Once you have completed the acknowledgements, click the Mark Complete button in the top right corner.
Step 9: First Day Tasks – Benefits Enrollment Information

This task is strictly informational as it takes you directly to the New Employee Benefits page on the Division of Human Resources website.

Please read all of the information available on this website and be sure to click links to visit Public Employee Benefit Authority (PEBA) website.

Bookmark this New Employee Benefits webpage then click the Mark Complete button. You will receive two email communications to complete your benefits elections and may need to refer back to this website.
Step 10: First Day Tasks – Entering Working Hours and Leave

This task links you to the Payroll Department website which houses training guides and resources for UofSC’s Time and Absence System. Please read all relevant information provided for your type of position.

Once you have viewed all applicable information about the Time and Absence System, return to this page in Onboarding and click the Mark Complete button.
Step 11: First Week Tasks – Addresses

Your home address will automatically populate in HCM from your Application Data as entered in PeopleAdmin.

Confirm the home address information is accurate or make changes if needed. To make changes, click the ▶ arrow on the right side of the row for your home address. Update the applicable fields and then click the green Save button.

To add a separate mailing address, click the ▶ arrow on the right side of the row for mailing address. Update the applicable fields and then click the green Save button.

Once address verification and/or correction is complete, click the Mark Complete button.
Step 12: First Week Tasks – Emergency Contacts

UofSC does not require Emergency Contact information for employees, but it is highly encouraged that you provide at least one person to contact in the event of an emergency. Your supervisor, area HR Contact, and UofSC Division of HR have access to this information.

Click the **Add Emergency Contact** button to add an entry.
Step 12: First Week Tasks – Emergency Contacts continued

Enter the **Contact Name** of your Emergency Contact and select a **Relationship** from the drop-down menu.

Click the **Add Address** button to provide an address for your Emergency Contact.

Click the **Add Phone Number** button to provide a good contact number (this is the most important data point for an Emergency Contact).

Once all information is entered click the green **Save** button. You can enter a second Emergency Contact by clicking the + button, or click **Mark Complete** to finish.
Step 13: First Week Tasks – Degrees

Your degree information will automatically populate in HCM from your Critical Information Task as entered in PeopleAdmin. If there was missing or incomplete data entered in PeopleAdmin, your degree will not feed into HCM.

To add a degree, click the Add button.

(Continued on next page)
Step 13: First Week Tasks – Degrees continued

Complete all fields on the page by clicking the associated lookup button (magnifying glass icon) to see valid options.

Note once you select a Major Code and School Code the fields School Description and Major Description fields default and are not editable.

Click the Graduated toggle button to Yes and then click the green Save button.

If you have another degree to add click the + button and repeat the previous steps. Once all degrees are entered click the Mark Complete button.
Step 14: First Week Tasks – Ethnic Groups

Your Ethnic Group information will automatically populate in HCM from your Critical Information Task as entered in PeopleAdmin.

If the data did not come into HCM accurately or you need to make changes, click Yes or No for question 1 and click as many options as applicable in question 2.

If you are uncertain what the question is asking or what specific answers mean, click the applicable Explain link.

Once all selections are made click the green Save button. Note for this step clicking Save also marks the task as complete.
Step 15: First Week Tasks – Disability

This section is voluntary.

If you elect to complete this section, read all information provided and click the appropriate checkbox for yourself.

Once you have provided your answer click the green Submit button. Note for this step clicking Submit also marks the task as complete.
Step 16: First Week Tasks – Veteran Status

Read all information provided on this page (not all definitions pictured in the screenshot) and make the applicable Self-Identification election. If applicable enter your Military Discharge Date.

Once you have entered your information click the green Submit button. Note clicking Submit also marks this page as complete.
Step 17: Summary

This page shows a summary view of all onboarding tasks along with their status, date completed and gives you the ability to Mark Complete any that you may have forgotten.

If your summary page looks like this screenshot with all statuses showing as Complete, you have finished onboarding!

Click the Mark complete button to finalize your onboarding. Upon marking all onboarding tasks as complete, you now see that your Onboarding Activities tile appears as completed!