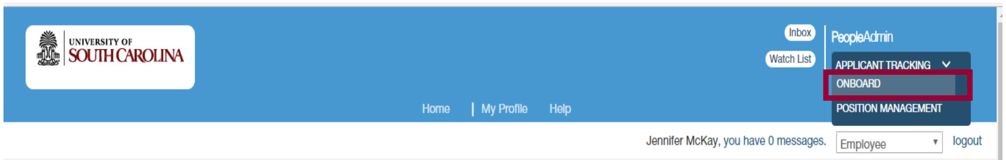
PeopleAdmin Quick Reference Guide

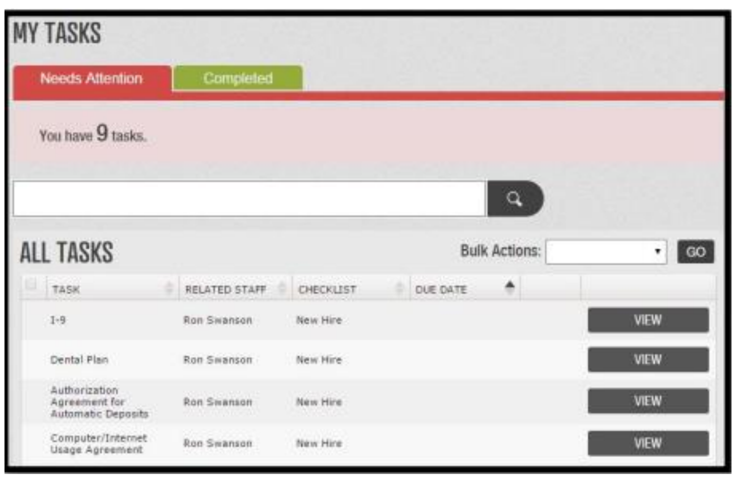
Managing Onboarding Checklists & Viewing Employee Files

1. To begin managing the progress of your employee's onboarding checklist(s), click ONBOARD from PeopleAdmin 7.0.

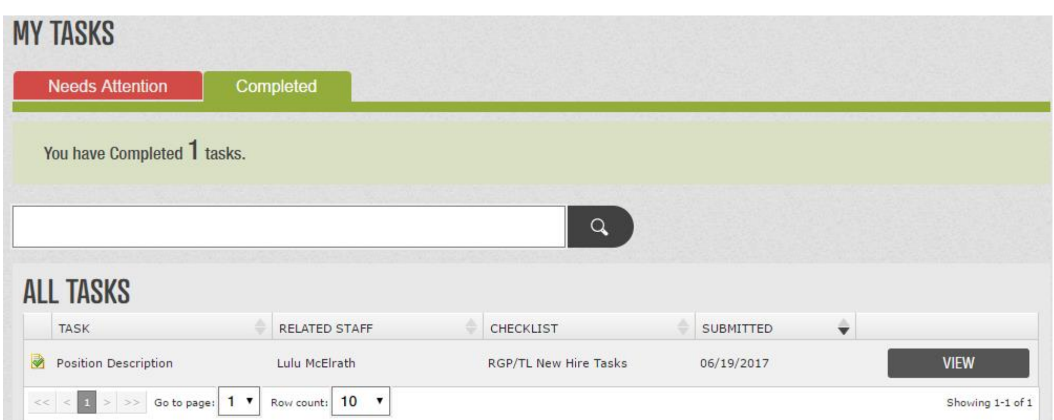


2. When you first log into Onboarding (Records Module), you will be taken to the My Task page. This is where you can view and complete any outstanding tasks you have been assigned as an employee or as a HR Contact for new employees.

- You will notice there are two tabs on this screen, (1) Needs Attention, and (2) Completed. The Needs Attention tab will indicate which tasks still require action on your part. To take action, click VIEW to open the form. You may be asked to fill out a new form, or sign or approve a form that has been submitted to you.



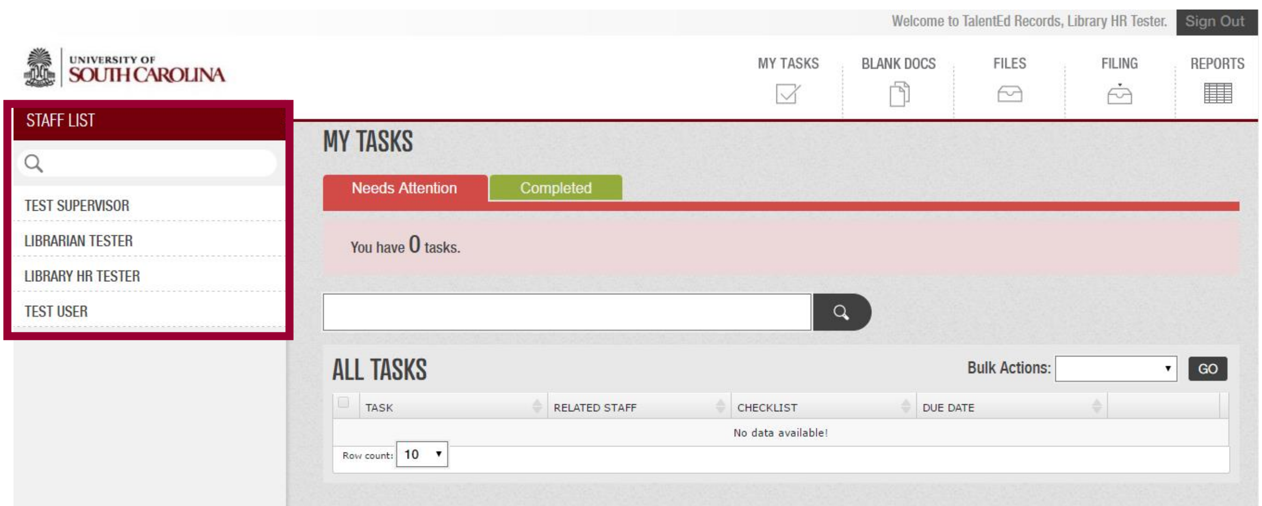
- The Completed tab is for your reference.



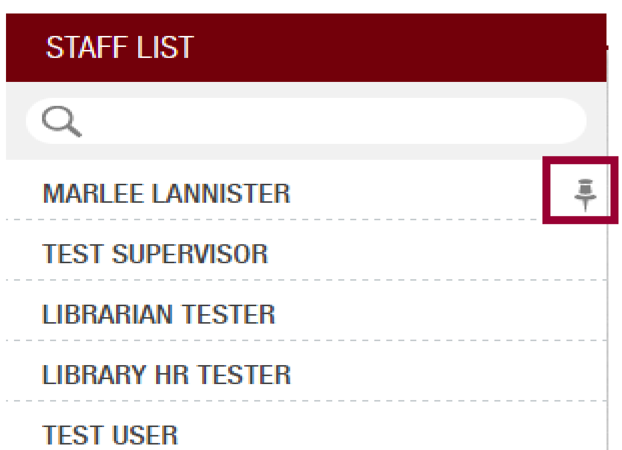
3. As an authorized* HR Contact, you will have access to view faculty and staff in your college or division.

- Your view of Records will include a Staff List on the left side of the screen. You can use the Search field to quickly find a staff member in the Staff List.
- Click on a staff member to open their files (you may see fewer files than you see for yourself based on the security settings defined by your system owner).
- You will also be able to track the progress staff is making on any assigned checklists.

*If you do not have access as a Dept. HR Contact, please contact your College/Division HR Contact to assist with managing onboarding checklists.



- To move a staff member to the top of your Staff List, toggle the pin icon on the right side of the staff name.
- This will pin them to the top of your Staff List until you click the pin again to unpin them.



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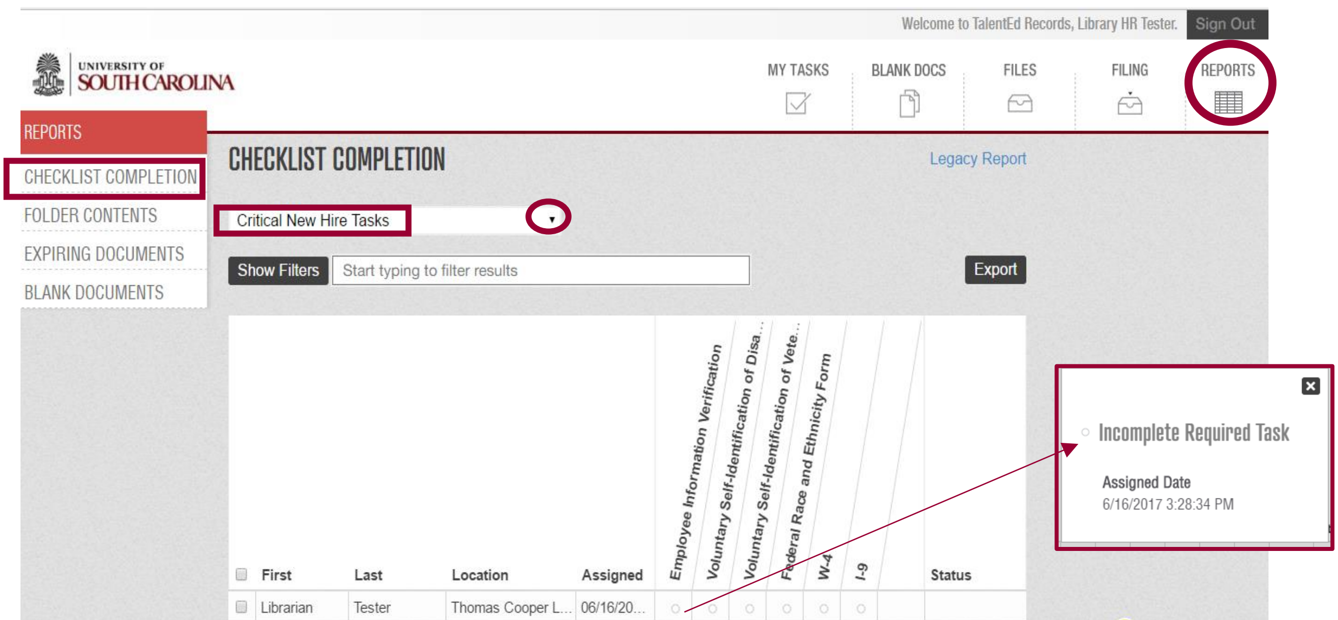
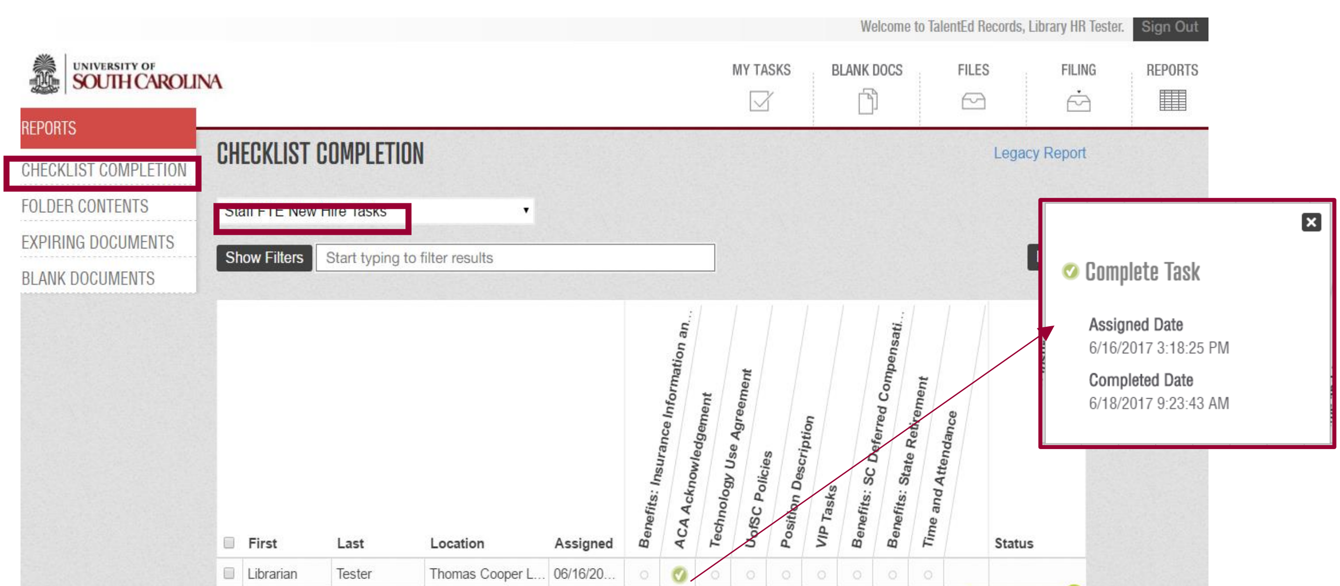
4. To monitor checklist completion, click REPORTS and select a checklist from the dropdown menu. Employees assigned to that specific checklist will appear.

   - We encourage all authorized HR Contacts to monitor the Critical New Hire Tasks daily (once they are assigned) to ensure the employee is on target to complete the tasks promptly. As a reminder, these tasks are required to enter an employee into our HR and Payroll system and have a direct impact in the employee accessing blackboard, email, etc., as well as pay.

   - Monitor the employee's progress and follow up as necessary until all tasks are complete.





5. Click FILES to view an employee's onboarding folders**.** Documents in Records are sorted into folders based on the type of document.

- The illustration below is a sample Folder structure you might see when you click on the Files button. This allows Payroll documents to be grouped together, Personnel documents to be grouped together, etc.

The illustration below shows what a sample Benefits Folder might include:

- If a document has been completed, you will see a piece of paper active in the Sleeve. See ACA Acknowledgement and International Health Benefits Information in the example below.
- If a document is currently being worked on, you will see In Workflow above the Sleeve as indicated by Benefits: State Retirement below.
- If a document has not been started or has not been assigned, the Sleeve will be blank. It is completely normal to have blank Sleeves in a Folder.

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Onboarding Action Items at a Glance

A new faculty, staff or scholar hired through PeopleAdmin 7.0 will receive an onboarding welcome email directly when the Critical New Hire Tasks Checklist is assigned. Additional email notifications will be sent for other assigned checklists. Here is an example of an email notification.

Immediate Action Required: Welcome to the University of South Carolina - South Carolina Test

Hello Lulu,

Welcome to the University of South Carolina! We are excited that you are joining the University.

For your convenience, the University of South Carolina utilizes an online records management system to deliver onboarding tasks to new employees, which allows you to complete most of your new hire documentation at home. Additionally, the system will help manage your tasks easily.

You have been assigned the Critical New Hire Tasks checklist. This checklist contains urgent tasks that must be completed before you can be hired into the HR and Payroll system and granted technology access. Please complete the assigned documents promptly to prevent any delays.

In addition to this checklist, you will receive additional tasks unique to your position at USC.

To log in to the system, please follow the link at the bottom of this message. **To ensure browser compatibility, please use Google Chrome.** Your username is: uscpatest@gmail.com. If you are logging in for the first time, please click the "Logging in for the first time?" link at the bottom of the log in page to reset your password.

If you have any questions as you complete your critical employment documents, please contact your supervisor or Human Resources contact.

With Kind Regards,

USC Human Resources

Log In

UNIVERSITY OF SOUTH CAROLINA

Human Resources

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Through an interactive experience, the onboarding checklist(s) include a range of tasks from requesting critical employment data, reading key policies, enrolling in state insurance and retirement benefits, and completing federal forms as listed below.

Title	Description
I-9 Form	This form must be completed on or before the employee's effective date of hire. Once the employee completes Section 1, it will automatically flow to a group of designated I-9/E-Verify authorized representatives for the college or division and appear as a task. Once Section 2 is completed by one of the representatives in the group, the task will disappear from everyone's task list.
Employee Information Verification	This form will collect personal data, including but not limited to SSN, date of birth, and state retiree status (that is not collected in the applicant tracking system). This form will also verify information, such as address and education.
Equal Opportunity Self-Identification Forms	Information on these forms is requested due to federal and state Equal Opportunity Employment laws and reporting.
W-4 Withholding	If no response is received for federal withholdings, defaults will be set as the system indicates.
Position Description Acknowledgement, if applicable	Your position description (PD) will be signed by your supervisor and will route to you electronically. Review and sign it electronically for your file.
Technology Use Agreement	All faculty and staff must read policies related to technology access and attest to user responsibility.
Benefits: Insurance Information and Enrollment*	Review and upload the Carolina Rewards Orientation Worksheet (CROW), and other applicable health insurance enrollment forms within 30 calendar days of hire. Upon receipt, your benefits administrator will process your elections with SC Public Employee Benefits Authority (PEBA). At that time, you will receive an email from SC PEBA to access MyBenefits to review and approve your state insurance elections.
Benefits: State Retirement*	Review and plan to select a state retirement plan within 30 calendar days of hire. An email from SC PEBA will be sent to you to enroll electronically.
Benefits: SC Deferred Compensation Program (SCDCP) Review	Review the South Carolina Deferred Compensation Program (SCDCP), a voluntary retirement program, and learn how to save for retirement.

ACA Acknowledgement	To comply with the Affordable Care Act (ACA), review the ACA Marketplace Notice before electronically signing this form to acknowledge receipt.
VIP Tasks	The employee will complete emergency contacts and establish direct deposit, which is mandatory for all university employees.
UofSC Policies	Familiarize yourself with university policies.
Time and Attendance	Training Guide for iTAMs, the main time and attendance system for the university. If your department utilizes another system, it will be reviewed with you accordingly.
Parking Registration	USC Columbia requires a Parking Permit for anyone using USC garages and lots. Learn about rates for various permits on campus. Metered and hourly parking may also be available, with no permit required.
Carolina Alert	USC Columbia has a campus wide alert system. Provide contact information in case there is a campus emergency.
Carolina Card	USC Columbia issues a Carolina Card for all faculty and staff employees.
University Orientation	Register for a new employee orientation to learn about the university, and tour the USC Columbia campus.

*These action items will only be assigned if the employee is eligible.