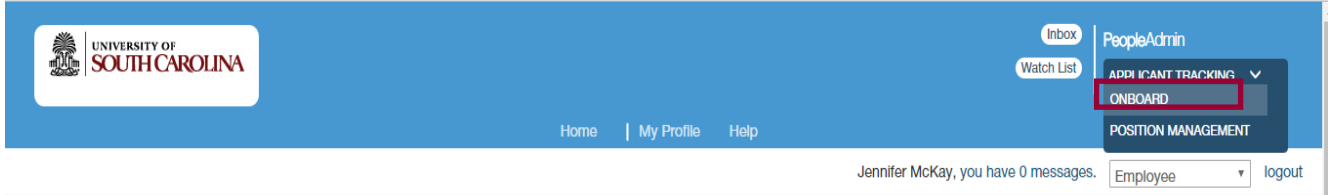


# Onboarding Tips for Supervisors & Managers

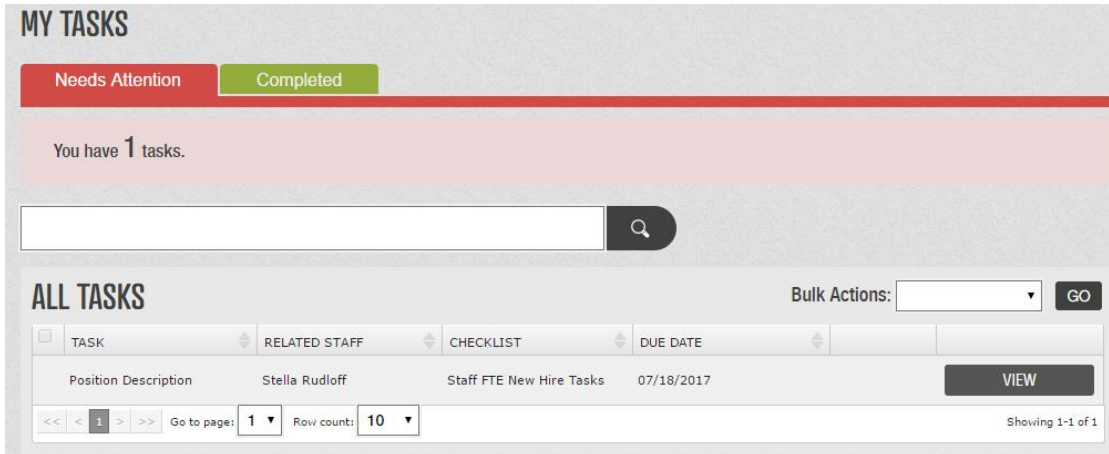
1. To begin managing the progress of your employee's onboarding checklist(s), click **ONBOARD** from PeopleAdmin 7.0.



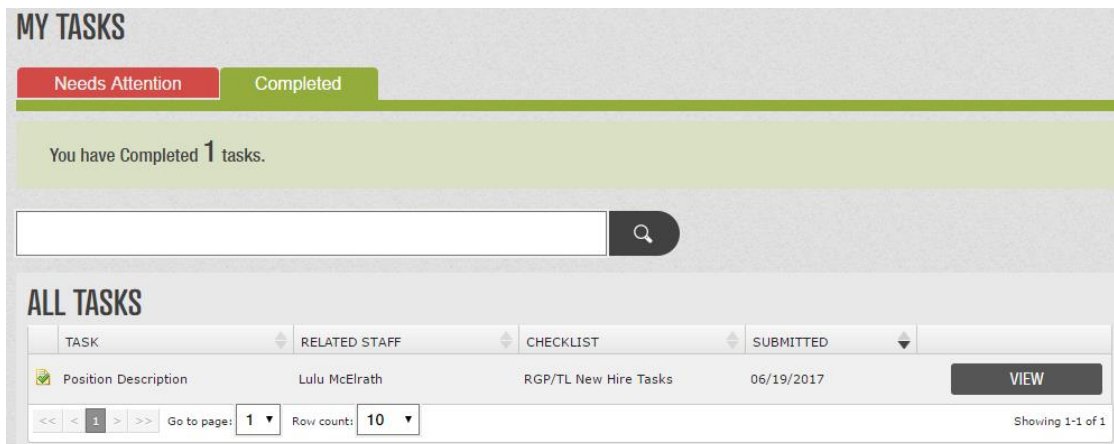
2. When you first log into Onboarding (Records module), you will be taken to the My Task page. This is where you can view and complete any outstanding tasks you have been assigned as an employee or as a supervisor for new employees.



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.

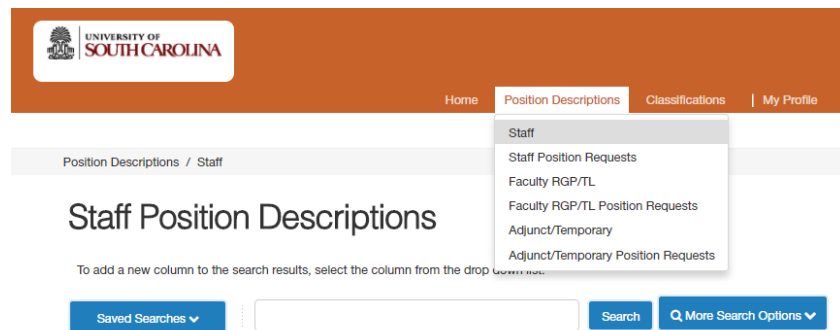
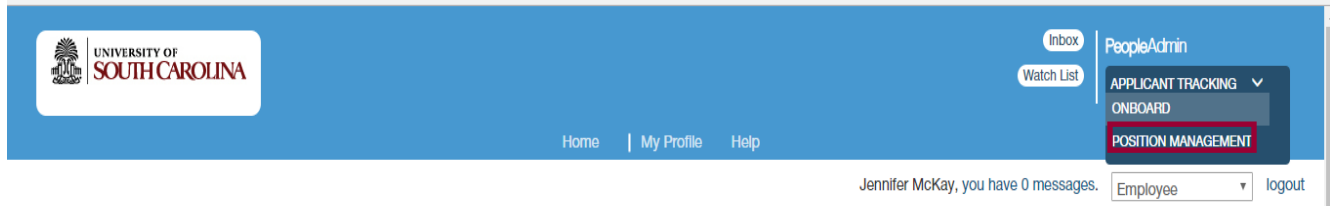


The Completed tab is for your reference.

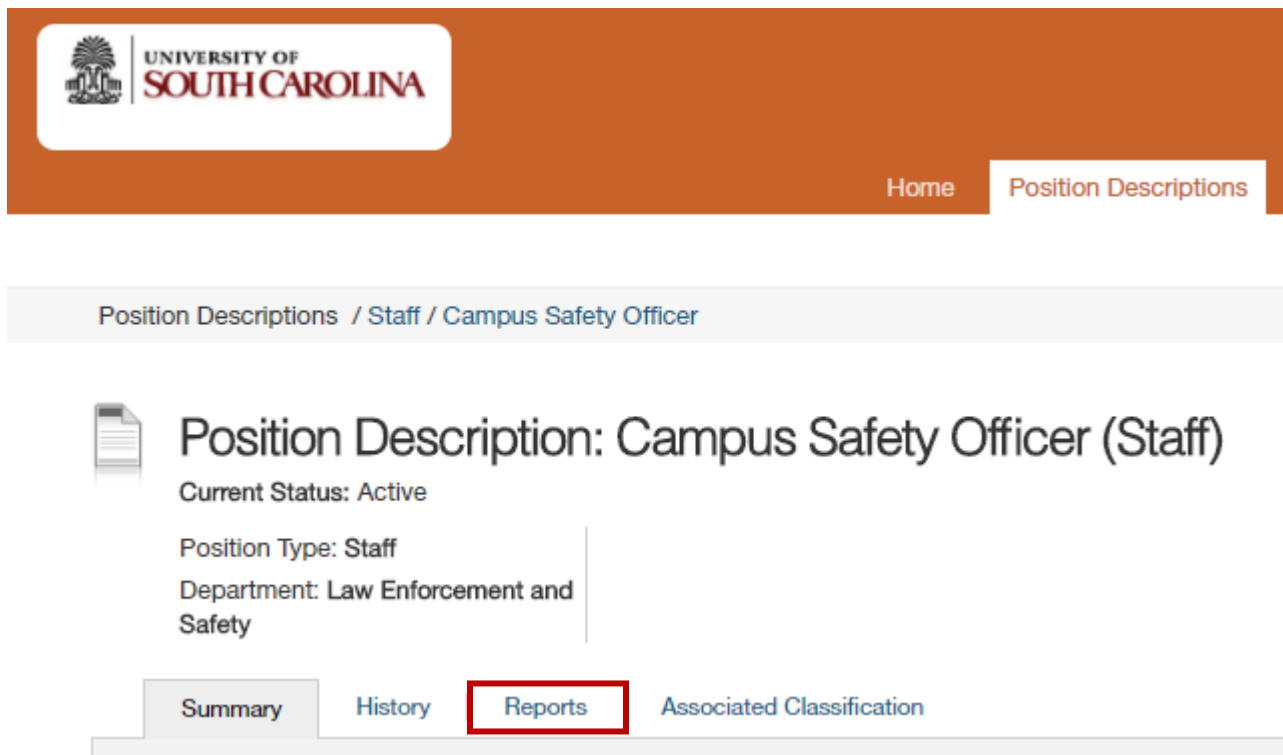


## Onboarding Tips for Supervisors & Managers

- If you supervise FTE staff, and research grant or time-limited staff and faculty, you will have a task to retrieve the new employee's position description (PD) from **Position Management** to upload and sign during onboarding. Log into Position Management.

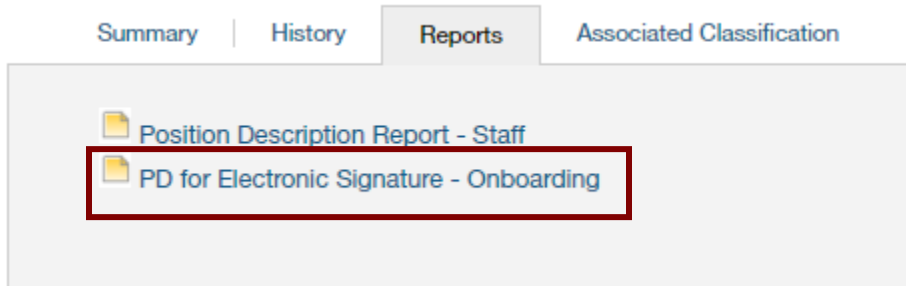


- Find the employee's PD from the Staff Position Descriptions list, open it and click Reports.

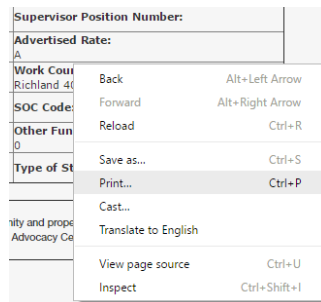


# Onboarding Tips for Supervisors & Managers

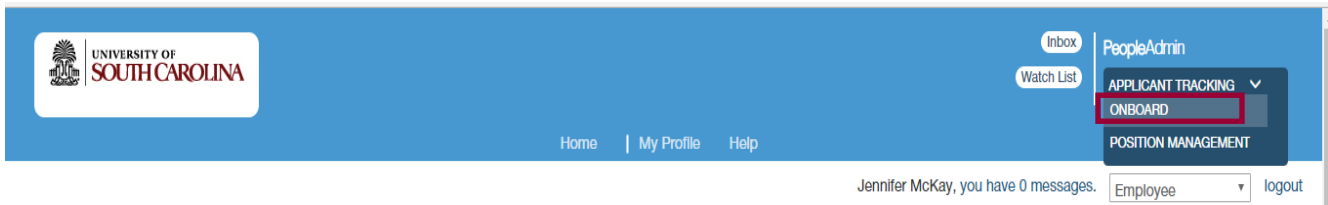
- Click the PD for Electronic Signature - Onboarding.



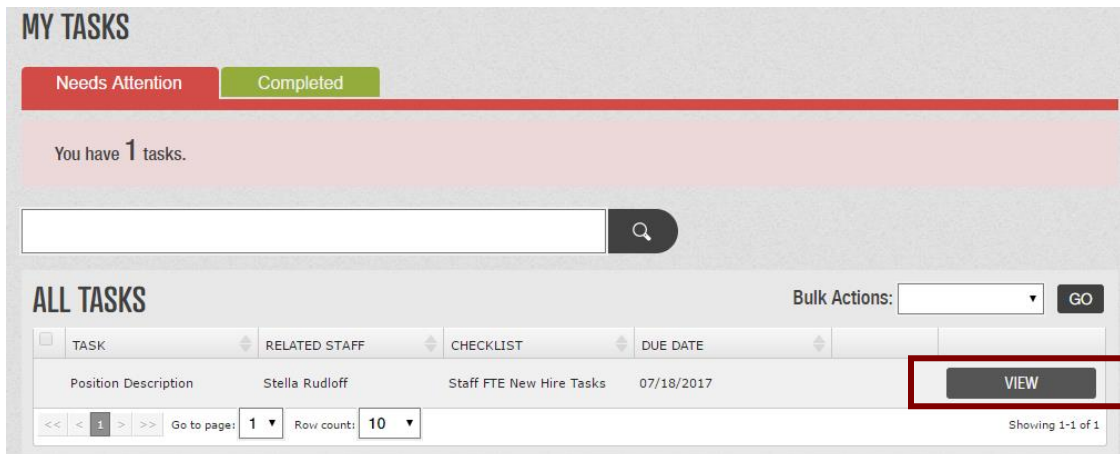
- Open the report, right click in the body and click print. Next, select Save as PDF as the Destination and save it on your desktop or other appropriate folder on your computer.



- Now that you have retrieved the PD and saved it on your computer, toggle to Onboard.



- Click View on the employee's PD to complete the task.



PeopleAdmin Quick Reference Guide  
**Onboarding Tips for Supervisors & Managers**

9. Upload the employee's PD.

**Supervisor:** Upload your employee's position description (PD). Once the task is submitted, your employee will be notified and the Position Description Acknowledgement will appear in their tasks with the attached PD.

**Employee:** Please click the Position Description attachment, review and complete the electronic signature.

**ATTACHMENTS**

Position Description

Upload a file

10. Click SAVE FINAL

Please Click to View/Hide the Workflow

---

Current User  
Test Supervisor

Date  
6/20/2017

Signature\*  
Click Save Final to move onto the signature step to sign the form

I have read and accept the [Electronic Signature Statement](#) \*

CLOSE

PRINT

PRINT AS PDF

SAVE DRAFT

SAVE FINAL

11. Once you click SAVE FINAL, the signature functionality will be enabled. Enter your name in the signature line and check that you have read and accept the statement.

**SIGN**

---

Current User  
Test Supervisor

Date  
6/20/2017

**You are the first signature/approval/review in this form's workflow. Please sign/approve/review.**

Signature\*

I have read and accept the [Electronic Signature Statement](#) \*

## Onboarding Tips for Supervisors & Managers

12. Once you complete the supervisor task, the PD will flow to the new employee to review and sign. It will then be filed in the new employee's folder.

### Supervisor Tools

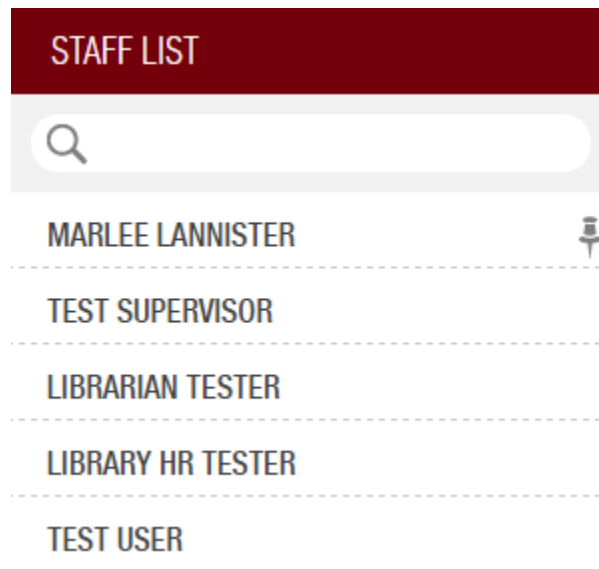
As a Supervisor, you will have access to view staff who report directly to you.

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 your staff are making on any assigned 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.

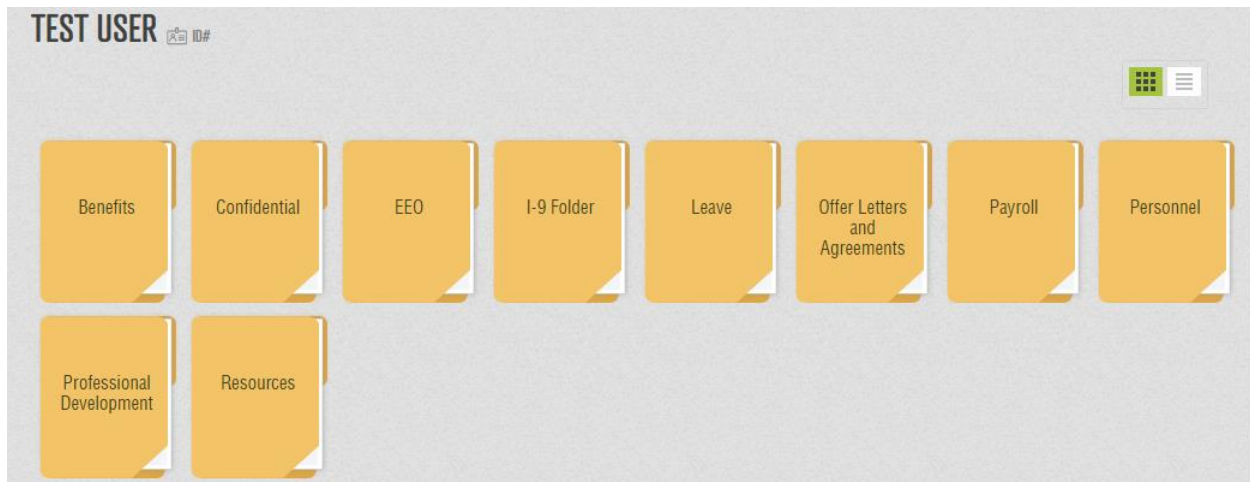


## Onboarding Tips for Supervisors & Managers

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 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.



## Onboarding Tips for Supervisors & Managers

A new faculty and staff member hired through PeopleAdmin 7.0 will receive an onboarding welcome email directly when the critical new hire checklist is assigned.

The onboarding process includes a range of tasks from providing 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 are 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, a benefits administrator will process the employee’s elections with SC PEBA. At that time, the employee will receive an email from SC PEBA to access MyBenefits to review and approve their 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 the employee to enroll electronically.





## Onboarding Tips for Supervisors & Managers

Human Resources

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	Employees need to familiarize themselves 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 you are eligible.