Onboarding Guide

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Access to CHRS Recruiting

The CHRS Recruiting system is a single system that serves all CSU campuses. Your campus user name and password identifies you as an internal CSU user. Only internal users can access the system.

SSO stands for single sign-on, also known as our campus portal. With SSO enabled, you do not need to log in to separate websites because you have already logged in to the CSU intranet.

Depending on your user role, there are fields shown throughout this guide that are accessible for your review. If you need to change your user role or access in CHRS Recruiting, the IT HR Access Request Form (ARF) must be completed. The Department IT Coordinator (DITC) will typically complete the IT HR ARF for new employees. Current employees who need to change their access must also submit an IT HR ARF; check with your department for guidance.

1. **Open a web browser**
   (Google Chrome is recommended)

**IMPORTANT:** POP-UP
Blocker needs to
be turned-off.
2. Log into the Portal and enter your username and password.
3. Search for the CHRS Recruiting App

**Current Portal (before 10/4/2021):**

Select this Hamburger

**New Portal (as of 10/4/2021):**

Select this hamburger menu
Introduction

After the selected, Final Candidate has accepted the offer, they will gain access to the Onboarding Portal. The Onboarding Portal has a welcome video, links to related employee information, and onboarding tasks that are generated by the selected onboarding workflow on the offer card.

This guide will detail the onboarding component of the CHRS Recruiting system, and highlight how department users can support new employees with completing all onboarding tasks.

Accessing the Onboarding Portal for New Employees

1. Onboarding Portal Access for the New Employee

A. New employees will be able to access the onboarding portal through their CHRS Recruiting applicant portal

B. After accepting the position, a yellow banner will display at the top of their applicant portal

C. They will select “Go to employee portal” to enter the onboarding portal
2. Onboarding Portal

A. Employees can navigate to the following tabs on the portal to learn more about the campus and resources available to them:
   - About (the university)
   - Total Wellness
   - Employee Resources

B. A welcome message and video will greet the new employee

C. The selected onboarding workflow will generate tasks that the employee will need to complete
3. Completing Each Task

When a task is selected, a pop-up screen will display. Tasks will contain guidance for employees. Several tasks will have links to documents that will need to be completed and submitted by the employee.

A. The due date for the selected task will be displayed

B. After completing the task, employees should select the “Mark as completed” button at the bottom left of the screen

C. “Close” at the bottom right of the screen can be selected to close the task screen

Follow the link below to complete the new hire forms. The link contains instructions for how to complete each form.

New Hire Forms via Adobe Sign

If you have questions, please reference our Payroll Services website and reach out to the payroll team.

The link contains the following forms:

- Cover Page
- Student Payroll Action Request (SPAR Form)
- Direct Deposit
- Self-ID Forms (Voluntary, Veteran, Disability)
- CSU Form SSA-1945
4. Completed Tasks

Completed tasks will have a strikethrough the task, as well as have a checkmark when viewing all tasks on the onboarding portal.

YOUR TASKS

<table>
<thead>
<tr>
<th>Task</th>
<th>Due</th>
</tr>
</thead>
<tbody>
<tr>
<td>Complete New Hire Forms</td>
<td></td>
</tr>
<tr>
<td>I-9 Form</td>
<td>Due: 29 May 2021</td>
</tr>
</tbody>
</table>
Department Users Accessing Onboarding Tasks for New Employees

Supervisors and Onboarding Delegates will have access to view onboarding tasks for their new employees. To ensure these users can see the new employee’s onboarding tasks, please ensure that their name is listed in the corresponding fields on the offer card.

1. **Onboarding Delegates and Reports To Supervisors**

   A. **Onboarding Delegates** – Within the “Onboarding section” of the offer card for a selected candidate, names can be entered as “Onboarding Delegates”. These users, and the “Reports To” supervisor, will be able to review the new hire tasks assigned to both the new hire, and the tasks assigned to the supervisor.

   - Onboarding Delegates 2 and 3 will be the only users to receive e-mail reminders of tasks needing to be completed.
2. Viewing Onboarding Tasks for a New Employee

Supervisors and Onboarding Delegates can navigate to the “Offers” tile on their dashboard and select “New Hires” to view onboarding tasks for new hires.

Users can also access new hire onboarding tasks by selecting “My New Hires” from the Main Menu. The next few screenshots correspond to My New Hires (there is another option called “My New Hire Tasks” that will be discussed later in this guide).

3. My New Hires

A. Users will have the ability to search for a desired candidate using several parameters

B. Select “View all tasks” for the desired candidate
4. New Hire Tasks

A. Users can display tasks based on the person that they are assigned to:
   - All tasks
   - Manager/Supervisor (Onboarding Delegates)
   - Employee

B. Users can select a task to view.

5. Viewing a Task

When a task is selected, users will be able to see the task as it was written for the user assigned.

A. When a hiring manager or Onboarding Delegate views a task that is assigned to the Manager/Supervisor, the option of “Complete task” will be available.

Please note that only the assigned user can mark the task as complete.
6. Adding and Editing tasks

A. Users can select “Add new task” or “Add” in the task group to add to the list of tasks that need to be completed

B. The pencil icon can be selected to update the task. Users should only edit tasks that they created

C. Tasks with a trash can icon are optional. Users can review the task, and delete as necessary
7. **Adding a New Task**

Users will need to complete the following screen to create a new task.

A. If users have a task that is used repeatedly for all new hires, they can select the “Add to favorites” box. This will allow the user to select this task to be added to each new employee when viewing their task list.
8. Favorite Tasks

After a task is added to the favorite task list, users will see this task under their “My Favorite Tasks” listing. By selecting the plus icon they can add this task to the new hire they are currently viewing.

9. Completed Tasks

When a task is completed, the status of the task will be updated to “Completed” in the task list.
10. **Bulk Complete**

Users that would like to mark tasks complete in bulk, can do so by navigating to the “New hire tasks” button on the “Offers” tile on their dashboard, or by using the Main Menu.

On this following page, tasks can be filtered by employee or task.

A. Users can select the desired tasks.

B. Users can then select “Bulk Complete” to mark all selected tasks as completed.