Onboard User Guide: Onboard from an Employee & Supervisor Perspective

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Preboarding and Pre-Hires

Pre-hire/preboarding: Preboarding is used to assign tasks and share relevant information with potential employees prior to when they have been hired – this is called a “pre-hire”. This allows us to add those Pre-Hires into the system without an employee number, agency email, exact start date, or position. Pre-hires are only for student positions and Head Start positions. Students will complete their background check as part of the preboarding process. Head Start employees will complete pre-employment requirements for their Head Start role.

Employee/Onboarding: A person is considered an employee once they have completed the background check, preemployment requirements, a start date has been determined, and they’ve moved to Onboard. When moved to Onboard, employees will be sent an activation email. All current employees who are promoted will already have an account and will not need to activate it if they’ve done so prior.

Onboard Portal

When moved to Onboard, below is the landing page for the new hire. From here, they can complete tasks, browse through all the helpful information on their portal(s), and access their Dashboard and their Employee Details page.

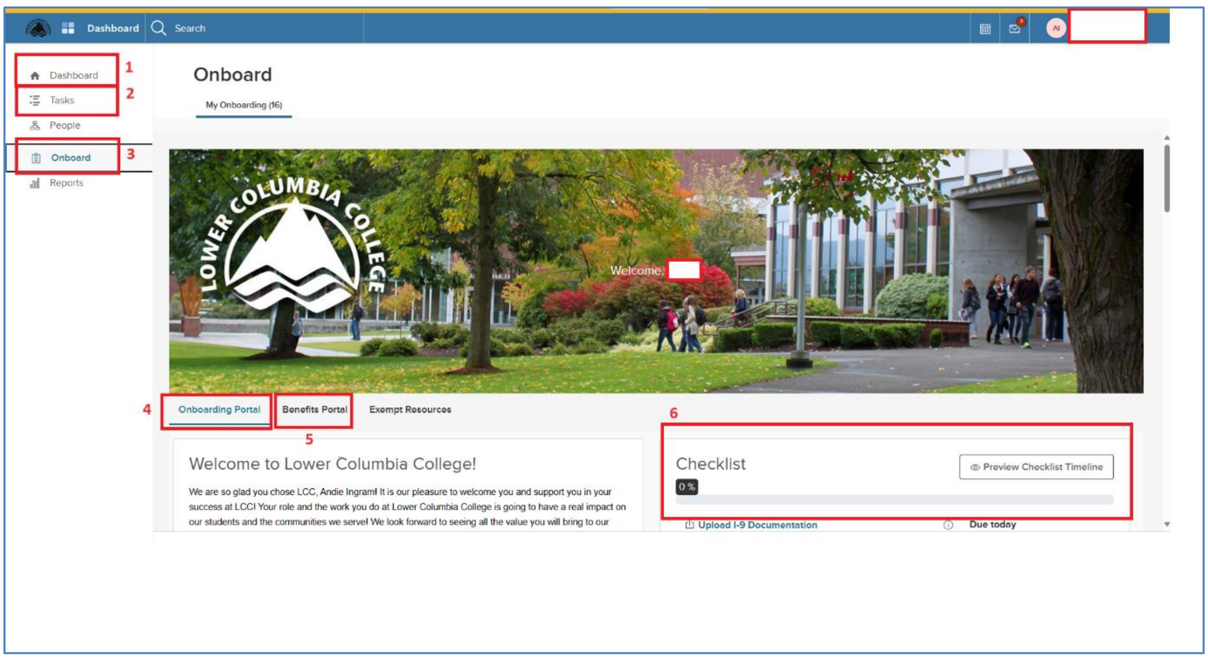


Figure 1: Employee View - Onboard Portal

1. **My Dashboard**: Displays all current tasks the employee needs to complete by default
    a. They can also view any *Completed*, *Canceled*, *Pending*, or *Skipped* tasks
    b. Any tasks related to the Online Hiring Center will also show here
2. **Tasks**: Displays a different view of tasks. Tasks can be completed directly from this page.
3. **Onboard**: Returns the employee to their Onboarding Portal. (that’s the view in above image)
4. **Onboard portal**: The Onboarding portal shares info about LCC, a welcome video from President Seimears, mentors (supervisor is automatically added as a mentor), helpful resources/links that are relevant for all employees.
5. **Sub-portal:** Only relevant sub-portals will be viewable as tabs from the main Onboard portal. Portals will include benefit info for benefit eligible employees, information on their classification, etc.

6. **Checklist Widget**: Where all To-Do tasks are listed as checklists. Checklists include forms, tasks, reviewing information, trainings, and more!

Checklist Widget

The **checklist widget** is always stored on the home portal. All checklists, no matter how they are assigned to an Employee, display on the home portal.

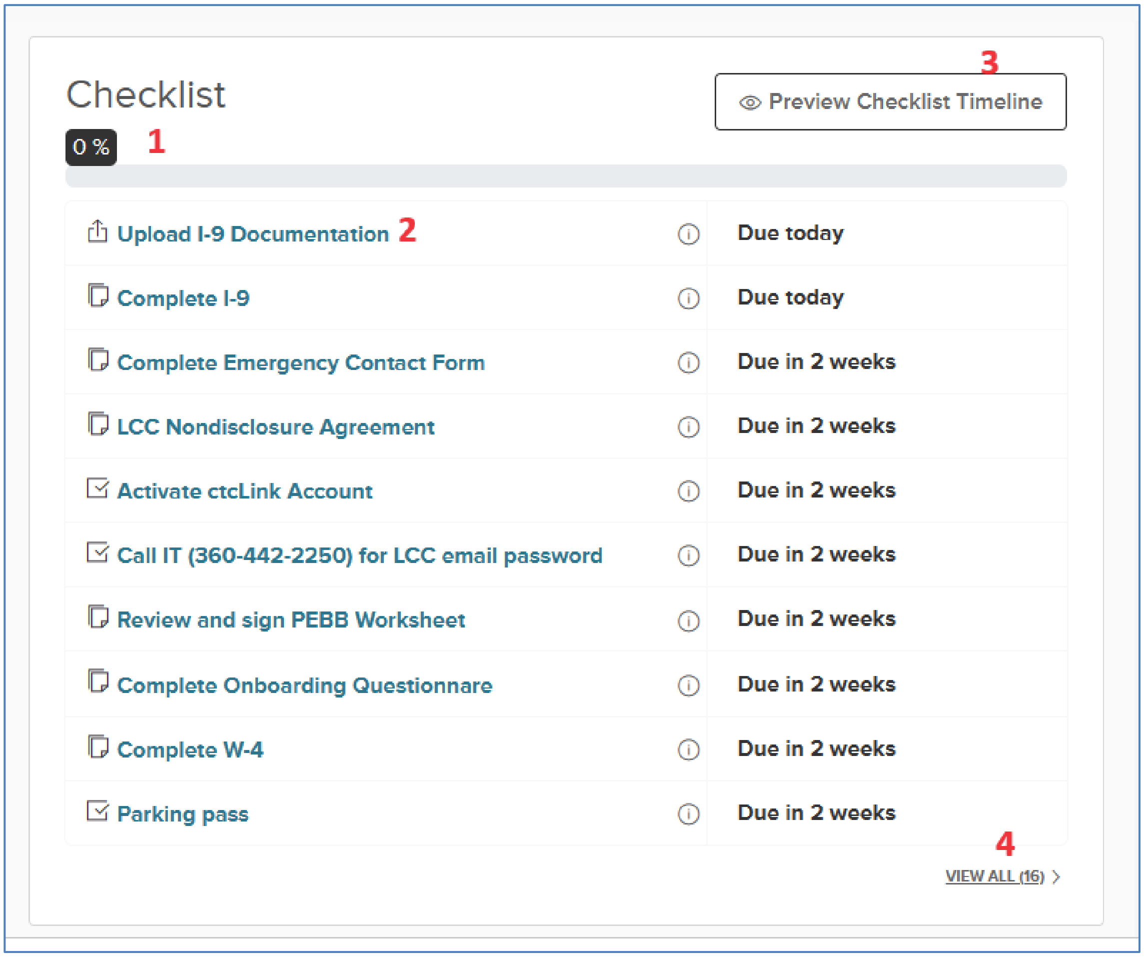


Figure 2: Sample Checklist Widget

1. The **completion progress bar** updates as pre-hires or employees complete their assigned tasks.
2. Each task allows employees to click on it to review and complete the task.
3. Click on the **preview checklist timeline** button to display each task's due date relative to the employee's start date.
4. Click **view all** to view all assigned checklists and tasks. They are broken up into groups/categories in this view. For example, trainings are one checklist, benefits are one checklist, etc.

My Profile

Employees can view their own employee details by hovering over their name in the right-hand corner and selecting My Profile. There is general job information, position information, and their supervisor listed here.

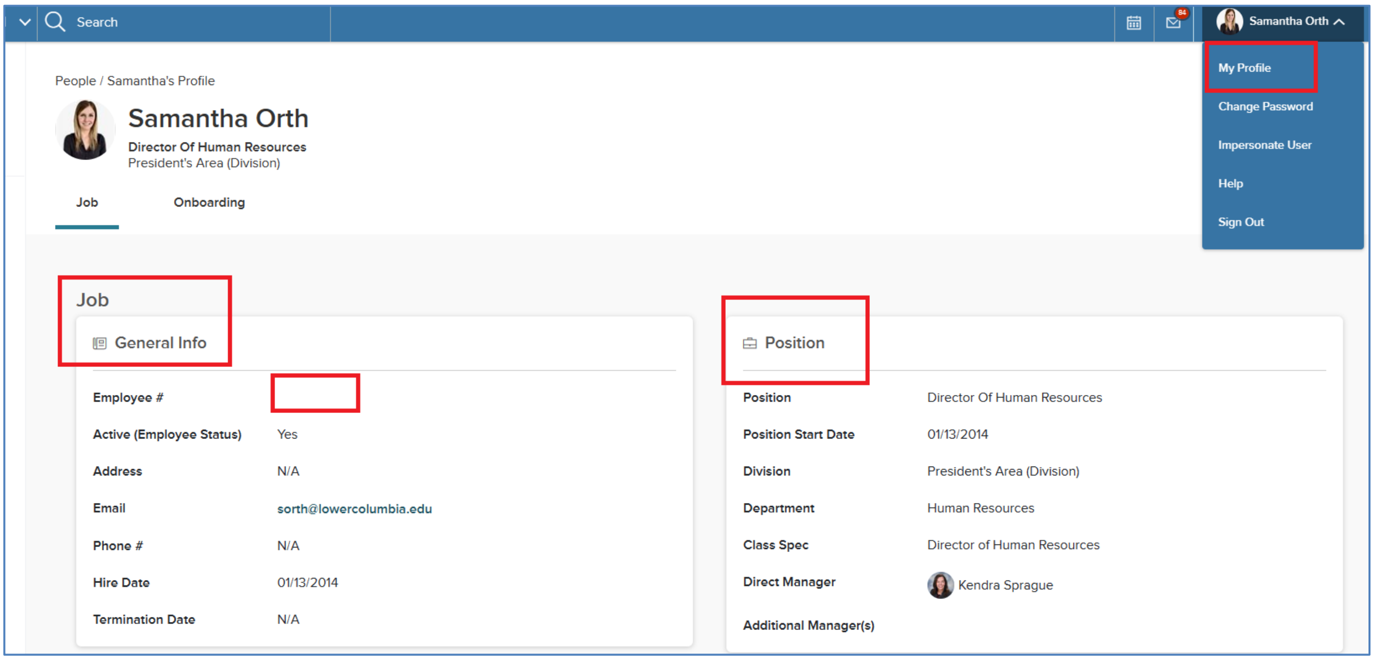


Figure 3: My Profile View

Employee Details

To route to the main Onboarding details page with more position details, tasks, forms, and notes, you select the Onboarding tab and the **Go to Onboarding details page button.**

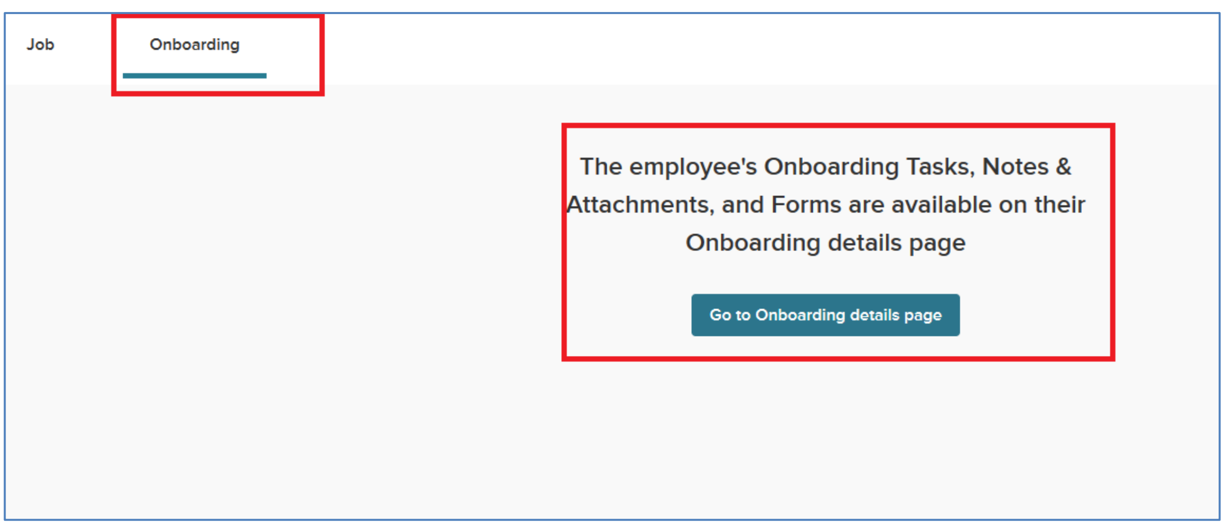


Figure 4: Route to onboarding details

Tasks & Forms

Uncompleted tasks as well as completed forms are viewable here. Forms are always accessible to employees. They can be exported to PDF and printed.

Tasks

Subject	Related To	Task Status	Task Type	Due Date	Updated On
Search	Search	Search	Search	Search	Search
Upload I-9 Documentation		Current	Attachment	03/27/2024	03/22/2024
Complete I-9		Current	Form	03/27/2024	03/22/2024
Complete Onboarding Q...		Current	Form	04/10/2024	03/22/2024
Complete Emergency C...		Current	Form	04/10/2024	03/22/2024
LCC Nondisclosure Agre...		Current	Form	04/10/2024	03/22/2024

First Previous 1 2 3 4 Next Last 5 Items per page

Figure 5: Tasks from Employee details

Forms

Export to ... Bulk Delete

	Form Name	Updated On	Status	Actions
	Search	Search	Search	
	Standard W4 Form	03/22/2024 11:42:12	Incomplete	
	Onboarding Questionnaire	03/22/2024 11:42:13	Incomplete	
	Emergency Contact Form	03/22/2024 11:42:13	Incomplete	
	LCC Nondisclosure Agreement	03/22/2024 11:42:13	Incomplete	
	Public Service Loan Forgiveness Form	03/22/2024 11:42:14	Incomplete	

First Previous 1 2 3 Next Last 5 Items per page Showing 1-5 o

Figure 6: Forms from Employee details

Employees can access their forms from the **Forms** section of their employee profile. A list of the Complete, In Progress, Incomplete, and Cancelled forms are available to review, along with potential actions.

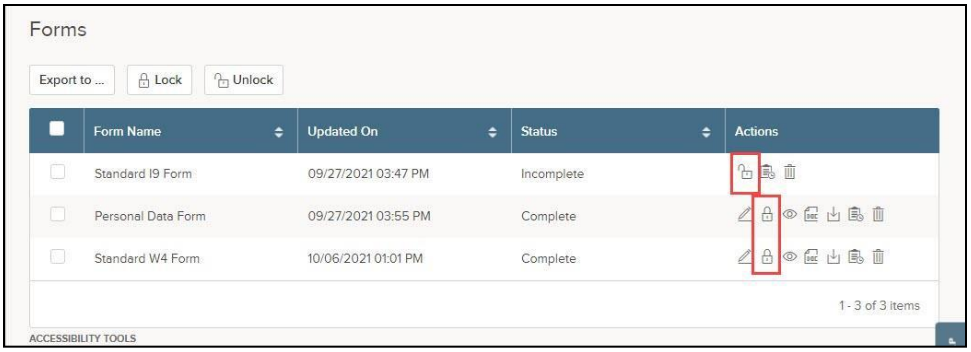


Figure 7: Locked/Unlocked Forms

The **lock** icon indicates whether a form is currently locked or unlocked. Forms automatically lock when the status of the form is "complete". When employees want to make edits to a completed form, they must notify the HR Admins to unlock the form. For federal compliance purposes, NEOGOV Onboard locks an Employee's Standard I-9 form by the end of their Start Date. *After the employee's fourth day, the system locks the form for all users in the system* and no edits are made unless an HR Admin unlocks the form.

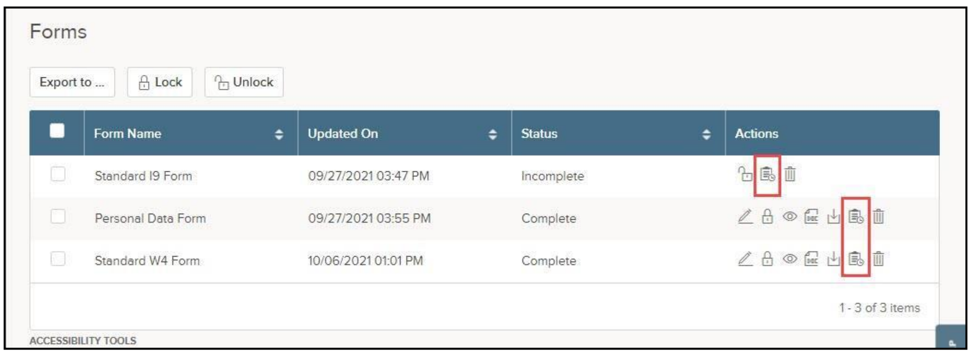


Figure 8: Form Audit Trail

Click on the **form audit trail** icon to view an audit trail of the corresponding form.

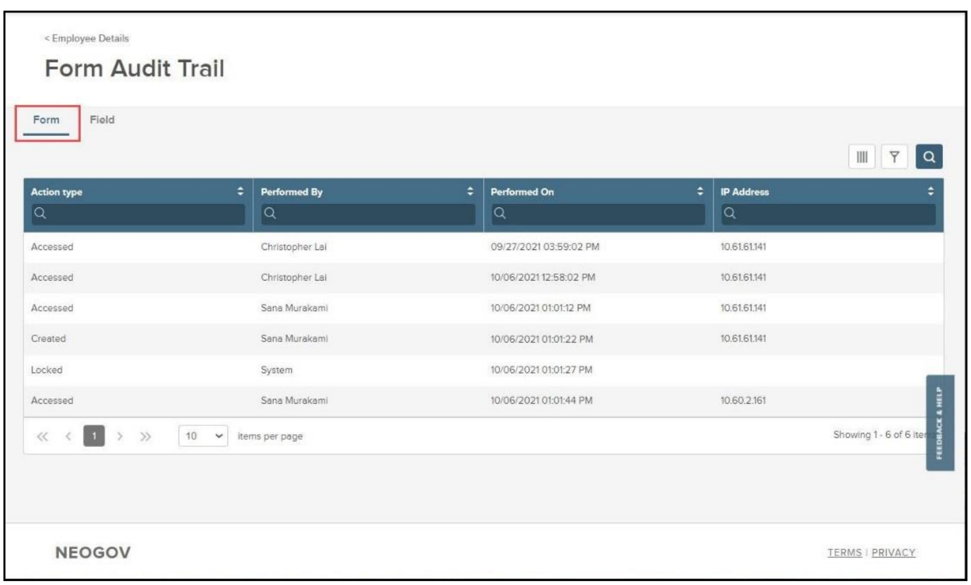


Figure 9: Form Audit Trail > Form

Select **Field** to view any changes that were made to the fields on a form. You can view when a field was updated, the new value, the old value, who made the update, when the update was made, and more.

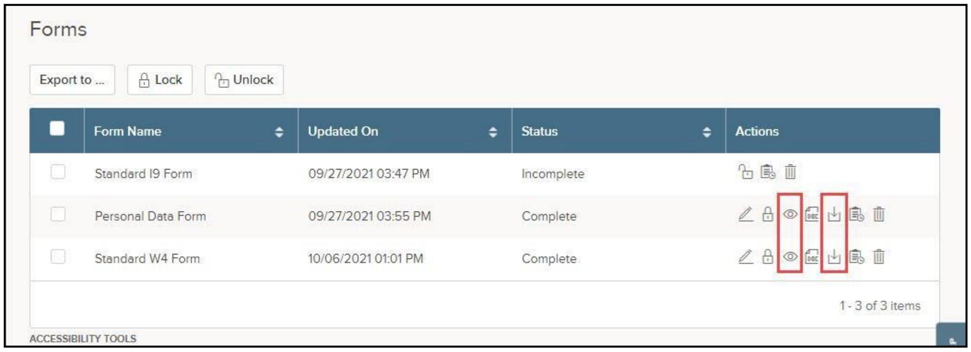
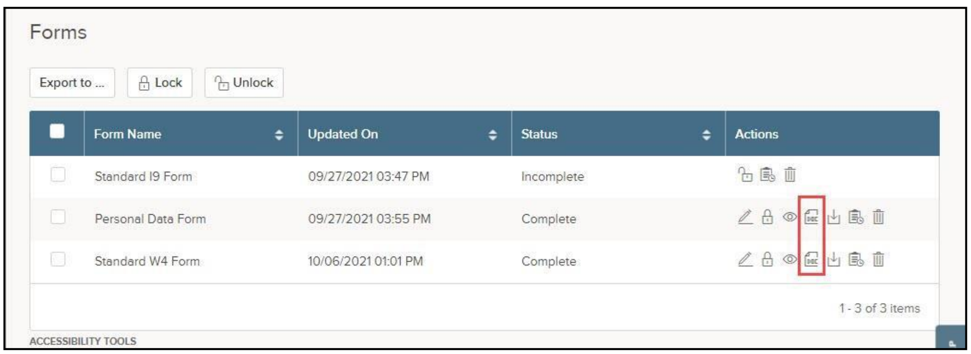


Figure 10: Preview and Download Forms

Returning to the forms section of the employee profile, notice the **preview** and **download** icons. These icons allow you to preview the form in your browser and download a PDF of the completed form.



Bulk Export Forms

If you have the need to export multiple forms out of the system and into PDF format, you can use the Bulk Export option located in the Forms Section of the Employee Details Page.

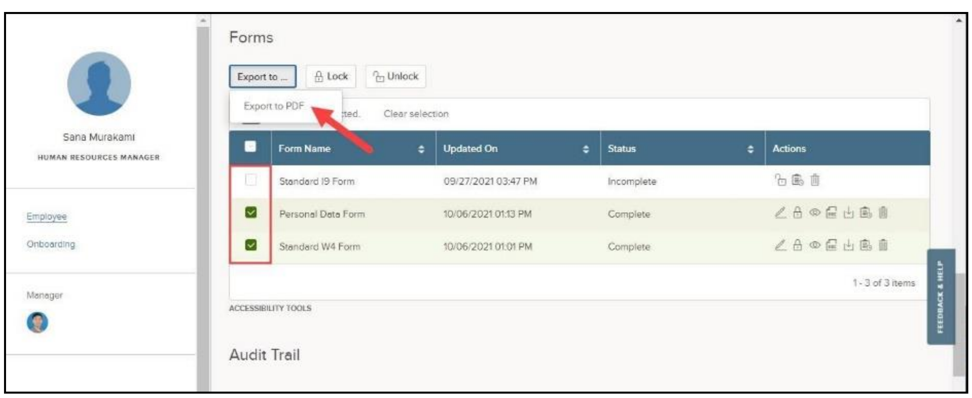


Figure 11: Employee Details > Forms > Bulk Export

Select the forms you would like to export using the toggles. Then, select **Export To…** and **Export to PDF** to trigger a document export job.

Supervisor Access to Employee Forms

Supervisors and other staff who help to facilitate the onboard process (e.g. IT, payroll) may have access to the profiles of other employees in the system. HR configures which forms these users have access to and it's based on their positions and involvement in the onboarding process.

Supervisor's View of Onboard

Supervisors have access to menu options that will help them keep track of and interact with the employee profiles in their hierarchy.

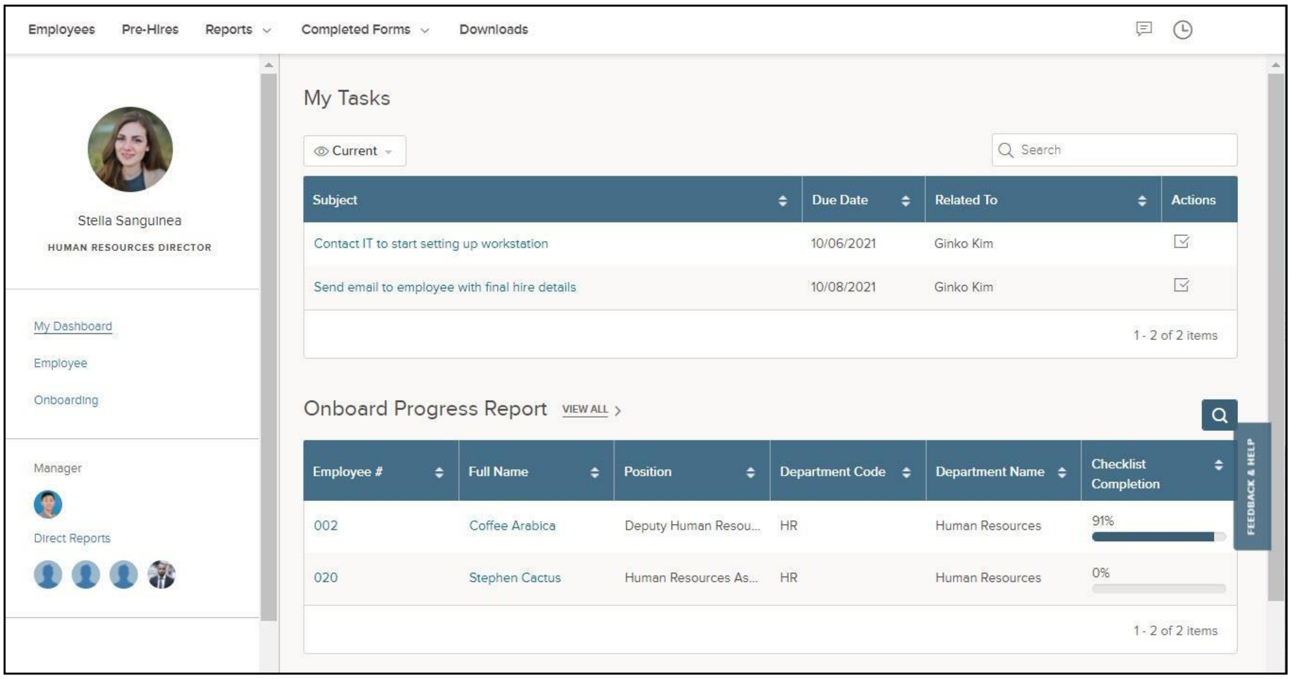


Figure 12: Supervisor's View - My Dashboard

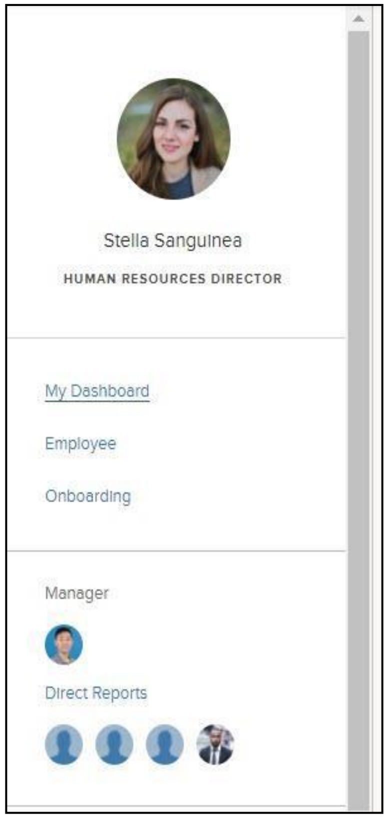


Figure 13: Supervisor's View - Side Menu

From the **side menu**, you can access your dashboard, your employee details page, and your own onboarding portal. You can also view your supervisor and your direct reports. Please note that while you can view the employee profiles of your direct reports and hierarchy, you will not be able to view the employee profile of your direct manager.

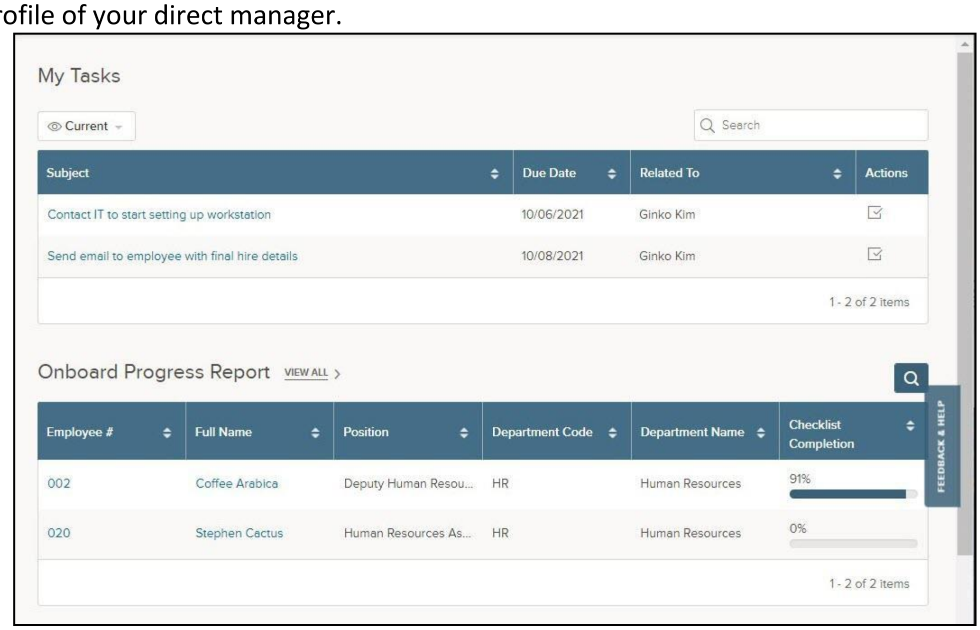


Figure 45: Supervisor's View - My Tasks and Onboard Progress Report

- The **My Tasks** section of the dashboard shows you all your current tasks. You may also filter for completed, canceled, pending or skipped tasks.

- The **Onboard Progress Report** generates the onboarding percentage completion status for each employee who has checklists assigned. HR determines your role in the Onboard process. Select **view all** to view the full Onboard Progress Report.

Definition and Checklists

Current - the employee, supervisor or HR Admin has access to the item and is ready to be completed
Overdue – the item is overdue and needs to be completed
Completed – the item is completed and submitted to the appropriate parties if applicable.
Pending – some items are not visible until other items are completed. An item is pending when the primary item has not been completed yet.
Hidden – the task is not ready for the employee, Supervisor, or HR Admin to complete yet.

Preboarding Checklists Assigned – Employee and HR/Head Start/EHS/ECEAP

These are the items employees receive in preboarding – only applicable to student employees & Head Start employees. The tables list who it is assigned to, the due date and what type of item it is (i.e. Task, Form, Attachment, etc.). The pre-hire is entered in ctclink once all items in pre-boarding are complete. Once an employee is entered in ctclink, they are moved to an employee, and will receive the onboarding checklist.

1. **Student Employee Preboarding Checklist**

Title	Assignee	Due Date	Type	Form Name
Complete Background Check	Employee	7 Days Before Position Start Date	Form	Student Background Check Form
HR Run Background Check	HR	2 days after receiving background check form	Task	

2. **Head Start/EHS/ECEAP Preboarding Checklist**

Title	Assignee	Due Date	Type
Send welcome email	Teresa Madsen	Upon receiving PC approval	Task
Start MERIT Portable Background Check	Employee	15 Days Before Position Start Date	Task
Notify Admin Services Manager regarding scheduled fingerprinting	Employee	0 Days After Previous Task	Task
Submit food worker’s card	Employee	7 days before start date	Attachment
TB Test	Employee	7 days before start date	Attachment
Certificate of Immunization Record	Employee	7 days before position start date	Attachment
Complete BBP Training	Employee	7 days before position start date	Task
Notify Admin Services Manager if need scheduled for CPR	Employee	7 days before position start date	Task

Onboarding Checklists Assigned – Employee, HR, Payroll and Supervisor

These are the items employees are assigned in onboarding. The tables list who it is assigned to, the due date and what type of item it is (i.e Task, Form, Attachment, etc.)

Generic Checklists

1. **Standard Form Tasks** – Completed by All New Employees

Title	Assignee	Due Date	Type	Form Name
1. Complete I-9	Employee	7-14 days before start date	Multi-contributor Form	Standard I9 Form
2. Upload I-9 documents	Employee	7-14 days before start date	Attachment	
3. Complete I-9 for Employee	HR Admin	3 Days After Previous Task	Multi-contributor Form	Standard I9 Form
Complete W-4	Employee	On Position Start Date	Form	Standard W4 Form
1. Complete onboarding questionnaire	Employee	7 days before start date	Form	Onboarding Questionnaire
2. Review onboarding questionnaire	Supervisor	2 Days After Previous Task	Form	

2. **Account & Access Checklist** – Completed by all New Employees

Title	Assignee	Due Date	Type
HR send email & ctcLink ID to employee	HR	7 days before position start date	Form
Activate ctcLink Account	Employee	1 Day Before Position Start Date/on position start date	Task
Call IT for LCC email password	Employee	On start date	Task
Sign up for direct deposit	Employee	7 days after position start date	Task
Enter in your Personal Details in ctcLink	Employee	7 days after position start date	Task
Parking pass	Employee	5 Days After Position Start Date	Task
Request LCC ID Badge	Employee	30 Days After Position Start Date	Task
Update info in LCC Directory	Employee	30 days after position start date	Task

3. **Employee Training Checklist** – Completed by all employees except student employees

Title	Assignee	Due Date	Training Platform
Code of Ethics/De Minimis Rules	Employee	90 days	Canvas
Emergency Preparedness Trainings	Employee	90 days	Canvas
HR Policies	Employee	90 days	Canvas
Information Systems & Services	Employee	30 days	Canvas
LCC Accessibility Training	Employee	90 days	Canvas

LCC Policies & Procedures	Employee	90 days	Canvas
Occupational Safety Trainings	Employee	30 days	Canvas
Whistleblower Act for State Employees	Employee	90 days	Canvas
DEI for the Workplace	Employee	90 days	Get Inclusive
Nexus | Records & Responsibilities (FERPA)	Employee	90 days	Get Inclusive
Groundswell 2.0 & Meridians: Combined Harassment & Title IX	Employee	90 days	Get Inclusive
Data Security	Employee	30 days	Get Inclusive
Submit Get Inclusive Training Certs to HR	Employee	90 days	

4. **Student Trainings Checklist** – completed by all student employees

Title	Assignee	Due Date	Training Platform
Occupational Safety Trainings	Employee	30 days	Canvas
DEI for the Workplace	Employee	90 days	Get Inclusive
Nexus | Records & Responsibilities (FERPA)	Employee	90 days	Get Inclusive
Groundswell 2.0 & Meridians: Combined Harassment & Title IX	Employee	90 days	Get Inclusive
Data Security	Employee	30 days	Get Inclusive

5. **Supervisor Checklist** – completed by all supervisors

Title	Assignee	Due Date	Type	Form Name
1. Complete Key Request form (if applicable)	Supervisor	10 Days Before Position Start Date	Multi-contributor Form	Key Request Form
2. Supervisor of Supervisor signs	Supervisor's boss	0 days after previous task	Multi-contributor Form	Key Request Form
3. Campus Services Review Key Request	Locksmith	0 days after previous task	Multi-contributor Form	Key Request Form
Send welcome email to new hire	Supervisor	At least 7 Days Before Position Start Date	Task	
Order name tag & business cards (if applicable)	Supervisor	7 Days After Previous Task	Task	
Take new hire on campus tour	Supervisor	60 Days After Position Start Date	Task	
Go over emergency procedures	Supervisor	On Position Start Date	Task	
Go over position description	Supervisor	On Position Start Date	Task	

Classified Onboarding Checklist

Classified employees have specific items assigned to them based on their classification.

Title	Assignee	Due Date	Form Name/Type
Complete emergency contact form	Employee	Before start date	Emergency Contact Form

PEBB Worksheet	Employee	Before start date	PEBB Worksheet
Nondisclosure Agreement	Employee	Before start date	LCC Nondisclosure Agreement Form
WFSE Payroll Deduction Form	Employee	10 days after start date	WFSE Payroll Deduction Form
Telework agreement form (if applicable)	Employee	7 days after start date	Link
Submit Official Transcripts to HR	Employee	10 days after start date	Task
Complete Classified Expectation Form	Supervisor	1 month after start date	Classified Expectation Form
1. PSLF (Optional)	Employee	30 days after start date	Public Service Loan Forgiveness Form
2. PSLF Employer Verification	HR Admin	3 days after previous task	Public Service Loan Forgiveness Form

Classified Benefit Checklist

Classified employees have specific benefit forms to complete. Benefit forms will be hidden in Onboard until their first day.

Title	Assignee	Due Date	Form Name/Type
1. DRS Enrollment Form	Employee	90 days after position start date	DRS Enrollment Form
2. HR Fill out DRS Employer Section	HR Admin	0 days after previous task	DRS Enrollment Form
MetLife – Life Insurance Form	Employee	30 days after start date	MetLife Enrollment Form
Enroll in medical & dental benefits in Benefits 24/7 portal	Employee	30 days after start date	Task
Upload dependent verification (if applicable)	Employee	30 days after start date	Task
1. Long-term Disability Form	Employee	31 days after start date	LTD Form
2. HR fill out employer section on LTD Form	HR Admin	0 days after previous task	LTD Form
Optional: HSA Form / FSA/DCAP Forms	Employee/HR Admin	30 days after start date	Form

Exempt Onboarding

Exempt employees have specific items assigned to them based on their classification.

Title	Assignee	Due Date	Type
Complete emergency contact form	Employee	Before start date	Emergency Contact Form
PEBB Worksheet	Employee	Before start date	PEBB Worksheet
Nondisclosure Agreement	Employee	Before start date	LCC Nondisclosure Agreement Form
Telework agreement form (if applicable)	Employee	7 days after start date	Link
Submit Official Transcripts to HR	Employee	10 days after start date	Task
1. PSLF (Optional)	Employee	30 days after start date	Public Service Loan Forgiveness Form
2. HR PSLF Employer Verification	HR Admin	3 days after previous task	Public Service Loan Forgiveness Form

Exempt Benefit Checklist

Exempt employees have specific benefit forms to complete. Benefit forms will be hidden in Onboard until their first day.

Title	Assignee	Due Date	Form Name/Type
1. Retirement Eligibility Form	Employee	30 days after position start date	Retirement Eligibility Form
2. HR Review Retirement Form	HR Admin	0 days after previous task	Retirement Eligibility Form
MetLife – Life Insurance Form	Employee	30 days after start date	MetLife Enrollment Form
Enroll in medical & dental benefits in Benefits 24/7 portal	Employee	30 days after start date	Task
Upload dependent verification (if applicable)	Employee	30 days after start date	Task
1. Long-term Disability Form	Employee	31 days after start date	LTD Form
2. HR fill out employer section on LTD Form	HR Admin	0 days after previous task	LTD Form
Optional: HSA Form / FSA/DCAP Forms	Employee/HR Admin	30 days after start date	Form

Full-time Faculty Onboarding

FTF have specific items assigned to them based on their classification.

Title	Assignee	Due Date	Type / Form Name
Welcome email from Office of Instruction	Karissa Vickaryous	7 days before start date	Task
Complete emergency contact form	Employee	Before start date	Emergency Contact Form
PEBB Worksheet	Employee	Before start date	PEBB Worksheet
Nondisclosure Agreement	Employee	Before start date	LCC Nondisclosure Agreement Form
Submit Official Transcripts to HR	Employee	10 days after start date	Task
Faculty Telework Agreement Form (if applicable)	Employee	7 days after start date	Link
Professional Partner Checklist	Employee/Professional Partner	30 days after start date	Professional Partner Checklist

Full-time Faculty Benefit Checklist

FTF have specific benefit forms to complete. Benefit forms will be hidden in Onboard until their first day.

Title	Assignee	Due Date	Form Name/Type
1. Retirement Eligibility Form	Employee	30 days after position start date	Retirement Eligibility Form
2. HR Review Retirement Form	HR Admin	0 days after previous task	Retirement Eligibility Form
MetLife – Life Insurance Form	Employee	30 days after start date	MetLife Enrollment Form
Enroll in medical & dental benefits in Benefits 24/7 portal	Employee	30 days after start date	Task
Upload dependent verification (if applicable)	Employee	30 days after start date	Task
1. Long-term Disability Form	Employee	31 days after start date	LTD Form
2. HR fill out employer section on LTD Form	HR Admin	0 days after previous task	LTD Form
Optional: HSA Form / FSA/DCAP Forms	Employee/HR Admin	30 days after start date	Form

Adjunct Onboarding

Adjunct employees have specific items assigned to them based on their classification.

Title	Assignee	Due Date	Type
Welcome email from Office of Instruction	Karissa Vickaryous	7 days before start date	Task
Complete Declaration Regarding Sexual Misconduct	Employee	Before start date	Declaration Regarding Sexual Misconduct
Complete emergency contact form	Employee	Before start date	Emergency Contact Form
PEBB Worksheet	Employee	Before start date	PEBB Worksheet
Nondisclosure Agreement	Employee	Before start date	LCC Nondisclosure Agreement Form
Submit Official Transcripts to Office of Instruction	Employee	10 days after start date	Task
Complete Verification of Retirement Plan Status	Employee	30 days after start date	Form
Professional Partner Checklist	Employee/Professional Partner	30 days after start date	Professional Partner Checklist

Temporary Part-time Checklist

Temporary part-time employees are assigned a specific checklist to clearly communicate what is applicable to them.

Title	Assignee	Due Date	Form Name
1. Temporary Appointment Notice	HR Admin	7 days before start date	Temporary Appointment Notice
2. Supervisor review, add budget, and sign TAN	Supervisor	0 days after previous task	Temporary Appointment Notice
3. Employee review & sign TAN	Employee	0 days after previous task	Temporary Appointment Notice
4. HR Sign TAN	HR Admin	0 days before previous task	Temporary Appointment Notice
Complete Declaration Regarding Sexual Misconduct	Employee	Before start date	Declaration Regarding Sexual Misconduct
Complete emergency contact form	Employee	Before start date	Emergency Contact Form
1. DRS Retirement Status Form	Employee	On start date	DRS Retirement Status Form
2. DRS Retirement Status Form	HR Admin	On employee's start date	DRS Retirement Status Form
Nondisclosure Agreement	Employee	Before start date	LCC Nondisclosure Agreement Form

Telework agreement form (if applicable)	Employee	7 days after start date	Link
1. DRS Eligibility Worksheet	Employee	On start date	DRS Eligibility Form
2. HR Complete DRS Eligibility Worksheet	HR Admin	0 days after previous task	DRS Eligibility Form

Non-perm Part-time Employee Checklist

Non-perm part-time employees are assigned a specific checklist to clearly communicate what is applicable to them.

Title	Assignee	Due Date	Form Name
1. Non-permanent Appointment Notice	HR Admin	7 days before start date	Non-permanent PT Appointment Notice
2. Supervisor review, add budget, and sign Non-perm Appt. Notice	Supervisor	0 days after previous task	Non-permanent PT Appointment Notice
3. Employee review & sign Non-perm Appt. Notice	Employee	0 days after previous task	Non-permanent PT Appointment Notice
4. HR Sign Non-perm Appt. Notice	HR Admin	0 days before previous task	Non-permanent PT Appointment Notice
Complete Declaration Regarding Sexual Misconduct	Employee	Before start date	Declaration Regarding Sexual Misconduct
Complete emergency contact form	Employee	Before start date	Emergency Contact Form
Nondisclosure Agreement	Employee	Before start date	LCC Nondisclosure Agreement Form
Telework agreement form (if applicable)	Employee	7 days after start date	Link
1. DRS Eligibility Worksheet	Employee	On start date	DRS Eligibility Form
2. HR Complete DRS Eligibility Worksheet	HR Admin	0 days after previous task	DRS Eligibility Form
1. DRS Retirement Status Form	Employee	On start date	DRS Retirement Status Form
2. DRS Retirement Status Form	HR Admin	On employee’s start date	DRS Retirement Status Form
WFSE Payroll Deduction Form	Employee	10 days after start date	WFSE Payroll Deduction Form
Complete Classified Expectation Form	Supervisor	1 month after start date	Classified Expectation Form

Work Study Employee Checklist

Work Study employees are assigned a specific checklist to clearly communicate what is applicable to them

Title	Assignee	Due Date	Form Name
1. Work Study Referral Form	HR	7 days before start date	Work Study Referral Form

2. Financial Aid verify WS amount on WS Referral	Financial Aid	0 days after previous task	Work Study Referral Form
3. Supervisor review and sign WS Referral	Supervisor	0 days after previous task	Work Study Referral Form
4. Student Review & Sign WS Referral	Employee	0 days before previous task	Work Study Referral Form
Complete emergency contact form	Employee	Before start date	Emergency Contact Form
Nondisclosure Agreement	Employee	Before start date	LCC Nondisclosure Agreement Form
Telework agreement form (if applicable)	Employee	7 days after start date	Link
1. DRS Retirement Status Form	Employee	On start date	DRS Retirement Status Form
2. HR Complete DRS Retirement Status Form	HR Admin	0 days after previous task	DRS Retirement Status Form

Student Help Employee Checklist

Student Help employees are assigned a specific checklist to clearly communicate what is applicable to them

Title	Assignee	Due Date	Form Name
1. Student Help Form	Student	7 days before start date	Student Help Form
2. Supervisor Complete Student Help Form	Supervisor	0 days after previous task	Student Help Form
3. HR Review Student Help Form	HR Admin	0 days after previous task	Student Help Form
4. Payroll Review & Sign Student Help Form	Payroll	0 days before previous task	Student Help Form
Complete emergency contact form	Employee	Before start date	Emergency Contact Form
Nondisclosure Agreement	Employee	Before start date	LCC Nondisclosure Agreement Form
Telework agreement form (if applicable)	Employee	7 days after start date	Link
1. DRS Retirement Status Form	Employee	On start date	DRS Retirement Status Form
2. HR Complete DRS Retirement Status Form	HR Admin	0 days after previous task	DRS Retirement Status Form

Head Start/EHS/ECEAP Checklist

Head Start employees have specific requirements as part of their onboarding process.

Title	Assignee	Due Date	Form Name/Type
Submit official transcripts to Head Start	Employee	30 days after start date	Task

Head Start New Staff Checklist	Employee	On position start date	HS - New Staff Orientation Checklist
HS Confidentiality Agreement	Employee	On position start date	HS - Confidentiality Agreement
HS Emergency Info Form	Employee	On position start date	HS – Emergency Info
CPR/First Aid Card	Employee	14 days after start date	Attachment