Onboarding Quick Reference Guide for Department Representatives

- **Accessing the portal:** When you access the FSU Onboarding tile from Department Administration or HR Administration, it will direct you to the Welcome Page. Click on the FSU Onboarding Landing Page to access the portal. If you use the NavBar Menu, click Onboarding > FSU Onboarding Landing Page to access the portal.

- **FSU Onboarding Landing Page**
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- **My Tasks**: My Tasks is a queue of action items that require your attention, like Dual Compensation, Leave Transfer, Outside Employment, Employment Relatives, and Supplemental Documents. *Ensure you click “Search” to populate a list of pending items.*

<table>
<thead>
<tr>
<th>My Tasks</th>
</tr>
</thead>
<tbody>
<tr>
<td>Use Saved Search:</td>
</tr>
<tr>
<td>Invitation Type:</td>
</tr>
<tr>
<td>First Name:</td>
</tr>
<tr>
<td>Last Name:</td>
</tr>
<tr>
<td>Applicant ID:</td>
</tr>
<tr>
<td>Start Date:</td>
</tr>
</tbody>
</table>

Click **Search** to populate current list of action items.

Click on the **Activity Name** to review and complete required Department steps.

Click **View Process** to view the candidate’s progress and status of the entire invitation.

Click **More Info** to view appointment and candidate details.

<table>
<thead>
<tr>
<th>Invitation ID</th>
<th>Name</th>
<th>Start Date</th>
<th>Activity Name</th>
<th>Assigned on</th>
</tr>
</thead>
<tbody>
<tr>
<td>0000013633</td>
<td>Sally Seminole</td>
<td>09/28/2020</td>
<td>Dual Compensation Approval</td>
<td>09/02/2020 09:50 AM EDT</td>
</tr>
<tr>
<td>0000013633</td>
<td>Sally Seminole</td>
<td>09/28/2020</td>
<td>Supplemental Documents(Admin)</td>
<td>09/02/2020 09:50 AM EDT</td>
</tr>
<tr>
<td>0000013631</td>
<td>John Doe</td>
<td>09/04/2020</td>
<td>Supplemental Documents(Admin)</td>
<td>09/09/2020 09:42 AM EDT</td>
</tr>
</tbody>
</table>

After the Department Representative has completed the action item in My Tasks, Department Representatives and Approvers can access workflow items from the Onboarding Welcome Page.

- The FSU Onboarding Approvals folder is for Department Approvers to access tasks to approve. Click the specific task to search for the candidate.
- The View FSU Onboarding Approvals folder is for Department Representatives to check the status of actions in process and view those previously completed. Click the specific task to search for the candidate.
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- **Invitation Console:** The Invitation Console provides helpful tools to track a candidate’s progress through the onboarding process.

  The Invitation Console allows you to:
  - Review the Invitation and Invitation Summary.
  - Click the Invitation ID to view the Invitation Summary.
  - Click "Info and Actions" for a summary of appointment information and to add the candidate to your "Watch" list.
  - View Process will display the candidate’s progress and status of the entire invitation.
  - Click "Watch" to receive alerts on the invitation.

The Invitation Summary provides important details to assist you in troubleshooting issues with your candidate, percentage completion for all tasks, and an overview of key steps in the process.

The candidate’s USERID, last login date, and account status are on this page.
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- **Additional Contacts:** Job offer originators can add additional contacts from within their department to the job offer to receive notifications about their candidate. The additional contacts will receive emails when an invite is launched, the background check status, and when the appointment is processed.
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- **Hire Date Changes**: If it is required to move a candidate’s hire date forward, Department Representatives can include this information in the “Comments” when submitting the candidate’s Supplemental Documents. Supplemental documents (ex: contract, offer letter, etc.) should reflect the updated date. An FSU Service Center case is not required. Please include the new hire date and reason for the change in the comment field.

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**Supplemental Documents**

- If this is an original invitation for the candidate, the following is required prior to hire:
  - A legible copy of their signed social security card or application receipt
  - A legible copy of their notarized Loyalty Oath form

- If the candidate has not uploaded the above documents, but instead has provided a copy to the hiring department, please upload below on their behalf.

- If this is an additional invitation for the candidate, social security card and loyalty oath are not required.

Additional supplemental documents required for the position should also be uploaded. Refer to the Appointment Papers Matrix or the step-by-step Employment Checklist on the HR website to see a complete list of required documents and/or actions required based on classification. Candidates being hired into a Faculty position must provide original official transcripts to the hiring department. Transcripts uploaded on this page are not considered to meet the official requirement without proof of proper chain of custody.

- If you haven’t uploaded all required documents and must return to upload additional documents, please click, Save. If you are finished uploading all required documents or no documents are required, please click, Save and Submit.

**Candidate Documents**

- Document Type: [Upload]
- Attached File: [View]

**Department/HR Admin Documents**

- Document Type: [Upload]
- Attached File: [View]

**Comment:**

- Hire Date Change per candidate’s request. New hire date 10/1/2020

- [Submit]
Tips for Department Representatives:

- If you have previously completed an onboarding session or are completing one as a candidate, you may be prompted to choose your role.
- Stay in touch with your candidates. You are their first line of support.
- Do not let your candidate’s invitation expire! An onboarding invitation expires after 21 days if not accessed by the candidate.
- If your candidate is an employee, rehire, current student, or former student who knows how to log into the myFSU portal, enter their Employee ID and FSUID when creating express appointments.
- Upload all documents needed for an onboarding invitation before clicking “Save and Submit” to submit the candidate’s supplemental documents. Submitting without all required documents will not speed up the processing timeline.
- Deadlines are met when the job offer and all documents needed are received in HR, not when the job offer is submitted.
- Department Representatives should proactively monitor their My Tasks. Approvers should proactively monitor their Worklists and FSU Onboarding Approvals.
- Know the difference! “View Onboarding Approvals” is for reviewing Dual Compensation, Outside Employment, or Employment of Relatives actions. “FSU Onboarding Approvals” is where approvers take action on pending items.
- Onboarding an additional appointment? Remember to consult with the Department Rep(s) for the employee’s existing appointment(s) to determine the following: No Change, Update, or Terminate. Coach Internal Transfers on how to appropriately answer the Dual Comp question.

Need help? Contact your department’s assigned recruiter or HR-Onboarding@fsu.edu

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