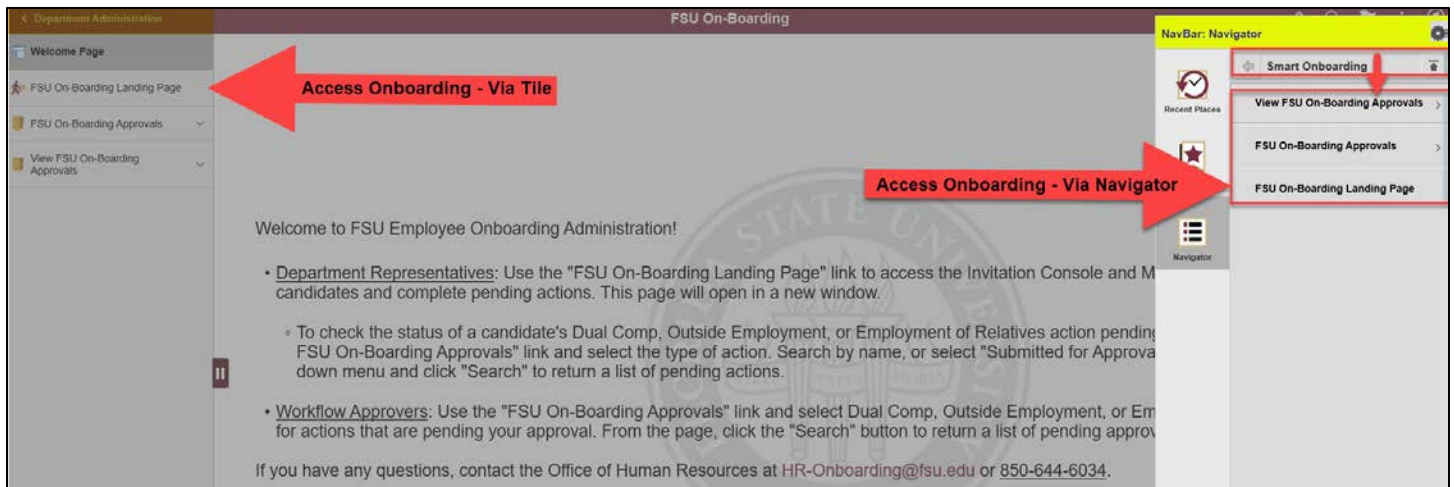




Smart Onboarding Quick Reference Guide for Department Representatives

- **Accessing the portal:** When you access Smart Onboarding with the **FSU On-boarding Tile** it will redirect you to the **FSU On-boarding Welcome Page** instead of landing on My Tasks automatically. Click on the FSU On-Boarding Landing Page to access the portal. If you are using the **Navigator**, click on the **FSU On-Boarding Landing Page** to access the Smart Onboarding portal. **Old navigations, favorites, tiles saved for My Tasks, Candidate Console, or Create Invitations are no longer accessible.**



- **FSU On-Boarding Landing Page (HOME)**



Smart Onboarding Quick Reference Guide for Department Representatives

- **My Tasks:** My Tasks is queue of action items that require your attention like Dual Compensation, Leave Transfer, Outside Employment, Employment Relatives and Supplemental Documents. The requirements and approval workflow for these tasks have not changed. *Ensure you click "Search" to populate a list of pending items.*

My Tasks

Use Saved Search:

Invitation Type: equal to

First Name: begins with

Last Name: begins with

Applicant ID: equal to

Start Date: equal to

National ID: contains

Department:

Citizenship Status: equal to

Search **Clear** [Advanced Search](#) [Save Search Criteria](#) [Delete Saved Search](#) [Personalize Search](#)

Quick Filter Showing 1 to 3 of 3 Rows per page 10

Invitation ID	Name	Start Date	Activity Name	Assigned on	View Process	More Info
0000013633	Sally Seminole	09/28/2020	Dual Compensation Approval	09/02/2020 09:50 AM EDT	View Process	More Info
0000013633	Sally Seminole	09/28/2020	Supplemental Documents(Admin)	09/02/2020 09:50 AM EDT	View Process	More Info
0000013631	John Doe	09/04/2020	Supplemental Documents(Admin)	09/08/2020 09:42 AM EDT	View Process	More Info

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.

More Info Details:
 Applicant ID: 685068
 Empl ID:
 Invitation Type: Additional Invitation
 Citizenship Status: U.S. Citizen
 Department: 025000 Human Resources
 Job Code: T011 Business Off Clerical Etc
 Position Number:

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

- The FSU On-Boarding Approvals folder is for Department Approvers to access tasks to approve. Click the specific task to search for the candidate.
- View FSU On-Boarding 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.

Welcome Page

- FSU On-Boarding Landing Page
- FSU On-Boarding Approvals**
- Dual Compensation Apprv
- Outside Employment Apprv
- Employment of Relatives Apprv
- View FSU On-Boarding Approvals**
- Dual Compensation Apprv
- Employment of Relatives Apprv
- Outside Employment Apprv

FSU On-Boarding Approvals is for Department Approvers (Supervisors and DDDH) to approve Onboarding tasks.

Click "View FSU On-Boarding Approvals" from the Onboarding Welcome Page to review approval items in process or previously approved.

Smart Onboarding Quick Reference Guide for Department Representatives

- **Invitation Console:** The Invitation Console provides helpful tools to track a candidate's progress through the onboarding process.

The Invitation Console interface includes a search filter section on the left, a main table of invitations, and a detailed profile view on the right. Red callout boxes provide instructions:

- Click the Invitation ID to review the Invitation and Invitation Summary**: Points to the ID '0000013635' in the table.
- Click "Info and Actions" for a summary on appointment information and to add the candidate to your "Watch" list**: Points to the 'Info and Actions' link in the table.
- View Process will display the candidate's progress and status of the entire invitation**: Points to the 'View Process' link in the table.
- Click "Watch" to receive alerts on the invitation**: Points to the 'Watch' button in the profile view.

Invitation ID	Name	Start Date	Invitation Status	View Process	View Historic Process(es)	Info and Actions
0000013635	Sally Seminole	09/28/2020	Invitation Completed	View Process	View Historic Process(es)	Info and Actions
0000013633	John Doe	09/28/2020	Invitation Launched	View Process	View Historic Process(es)	Info and Actions

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.

You can find the candidate's USERID, date of last login, and account status on this page.

The Invitation Summary page for candidate Sally Seminole (Invitation ID 0000013635) displays the following information:

- User ID:** SSEMINOLE
- Last User Login:** 9/17/2020
- Account:** Active/Unlocked
- Start Date:** 09/28/2020
- Candidate Progress:** 100% Complete (Completed Tasks: 11, Remaining Tasks: 0). Callout: "Displays percentage complete for candidate's steps only."
- HR Tasks Progress:** 100% Complete (Completed Tasks: 9, Remaining Tasks: 0). Callout: "Displays percentage complete for both Department and HR steps."
- Process Life Cycle:**
 - Invitation Created (Created by April Smatt on 09/01/2020 03:37 PM EDT)
 - Invitation Launched (Launched by April Smatt on 09/01/2020 03:37 PM EDT)
 - Registration Completed (Completed by Sally Seminole on 07/21/2020 10:05 AM EDT)
 - Process Initiated (Completed by April Smatt on 09/01/2020 03:37 PM EDT)
 - Background Check Submitted (Completed by Sally Seminole on 09/02/2020 11:39 AM EDT)

Smart Onboarding Quick Reference Guide for Department Representatives

- **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.

Prepare Job Offer

[Return](#) | [Recruiting Home](#) [Personalize](#)

Posting Title GA Express
Job Opening Status 010 Open
Job Title OPS Express Hire
Applicant Name Sally Seminole

Job Opening ID 47562
Business Unit FSU Business Unit
Position Number
Applicant ID 685116

Offer Details ?

Offer Details | Background Check | Outside Recruiting

Job Opening 47562 GA Express - SMERP Upgrade
Position Number
Recruiter Ivette Claudio
Status 006 Pending Approval
Created By Abigail Lejeune

Business Unit FSU01
Offer Date 09/17/2020
Applicant Type Employee

Preferred Contact Not Specified

Department Contacts Receiving Onboarding Notifications:

Job Offer Creator Abigail Lejeune
Dept Rep(FSU Dept Tbl)

Additional Dept Contact Email

 +

Departments can now add additional contacts directly to the job offer to receive Smart Onboarding system notifications.

- Save as Draft
- Submit for Approval
- Add Revised Offer
- Delete Offer
- Edit Offer

Smart Onboarding Quick Reference Guide for Department Representatives

- **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 no longer required. **Please include the new hire date and reason for the change in the comment field.**

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 here. Refer to the Appointment Papers Matrix or the step-by-step Employment Checklists 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.

Note: 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	Attached File
	<input type="button" value="Upload"/> <input type="button" value="View"/>

Department/HR Admin Documents

Document Type	Attached File
<input type="text"/>	<input type="button" value="Upload"/> <input type="button" value="View"/>

Click the Comments button to enter a hire date change

Comment:

Hire Date Change per candidate's request. New hire date: 10/1/2020.

Smart Onboarding Quick Reference Guide for Department Representatives

Key Tips for Department Representatives:

- Stay in touch with your candidates. You are their first line of support.
- Need to review your candidate's onboarding progress? Navigate to Invitation Console and click on the Invitation ID to review the Invitation Summary. Click View Process from the Candidate Console page for a detailed status updated.
- Previously saved bookmarks on homepages or favorites will not work—remove them.
- If you have completed an onboarding session or are completing one (as a candidate), you will need to choose your role if going through the Department Administration page (Department Administrator).
- Do not let your candidates expire! An onboarding invitation expires after 21 days if not accessed by the candidate.
- If your candidate is an existing employee, rehire, current student, or former student, please enter their Employee ID and FSUID when adding 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 job offer and all documents needed are received in HR, not when the job offer is submitted.
- Approvers & Department Representatives 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