**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 a 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.

[Image of My Tasks interface with search functionality and task details]

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.

[Diagram showing workflow and access to different folders]
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 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.
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.
**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.
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](mailto:HR-Onboarding@fsu.edu) or [HR-Onboarding@fsu.edu](mailto:HR-Onboarding@fsu.edu)

Revised 9/22/2020