Complete SuccessFactors Onboarding Activities

Overview

SuccessFactors Onboarding supports the collection and completion of standard hiring information and policy compliance requirements.

Onboarding applies to all hires who must complete benefit forms.

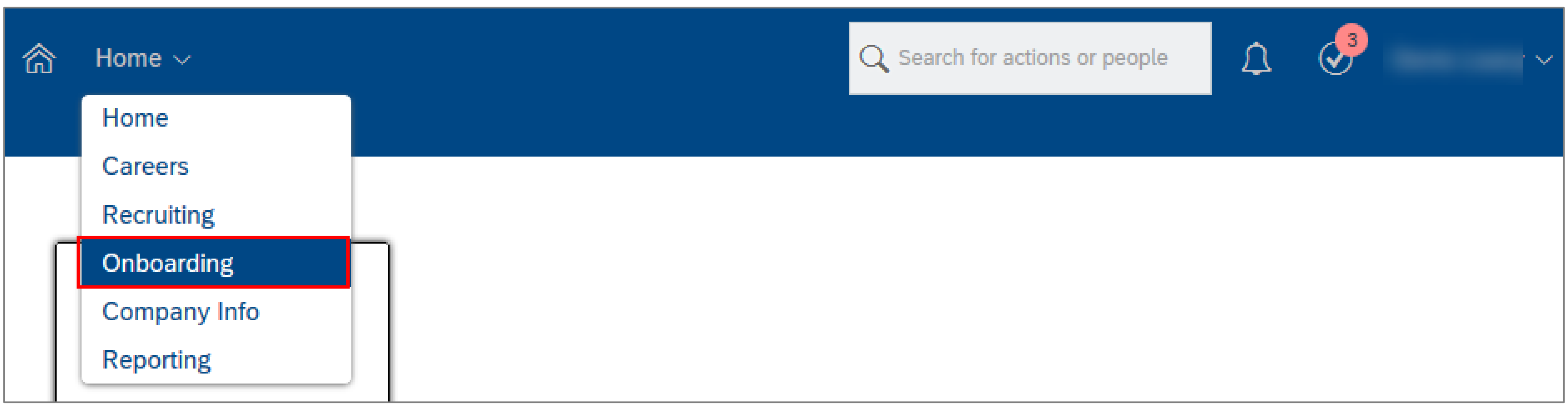
After HR Shared Services completes the initial SAP processing for a successful candidate, they will intiate the Onboarding process in SuccessFactors (if applicable), and the documents and forms that apply to the employee based on the nature of the hire will be identified.

Org Chiefs receive an email notification from SuccessFactors when Onboarding is initiated for applicable employees. This gives them the opportunity to complete a number of optional onboarding activities in SuccessFactors for the new employee. These include writing a welcome message, recommending links to helpful information, assigning them an individual to “buddy” up with, and recommending helpful people to connect with on-the-job. These activites cannot be completed in situations where Onboarding is not initiated because it does not apply to the employee’s hiring scenario (e.g. internal hire who is not required to complete benefit forms).

> **Note:** The information created by the Org Chief will be accessible to the employee on their start date. Applicable network access and email credentials must be in place for the employee to access SuccessFactors. Refer to the Complete Account & Access Request Form for New Employee how-to for further information.

Procedure

1. Click the **Home** menu and select **Onboarding** from the drop-down.

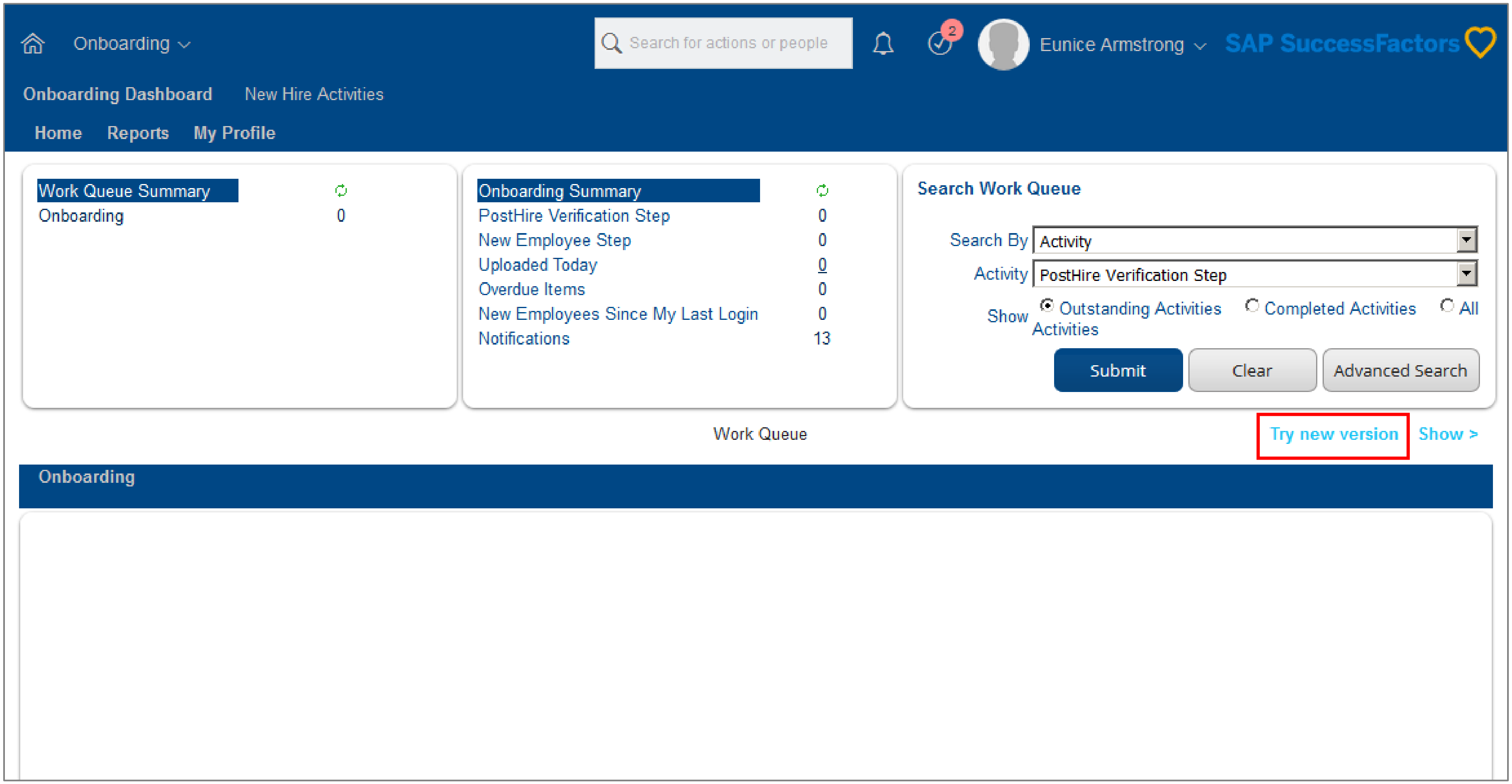


The *Onboarding Dashboard* screen appears.

Note: The first time you access the *Onboarding Dashboard*, the following screen layout displays.

2. Click the **Try new version** text on the right side of the screen to activate the updated dashboard screen layout.

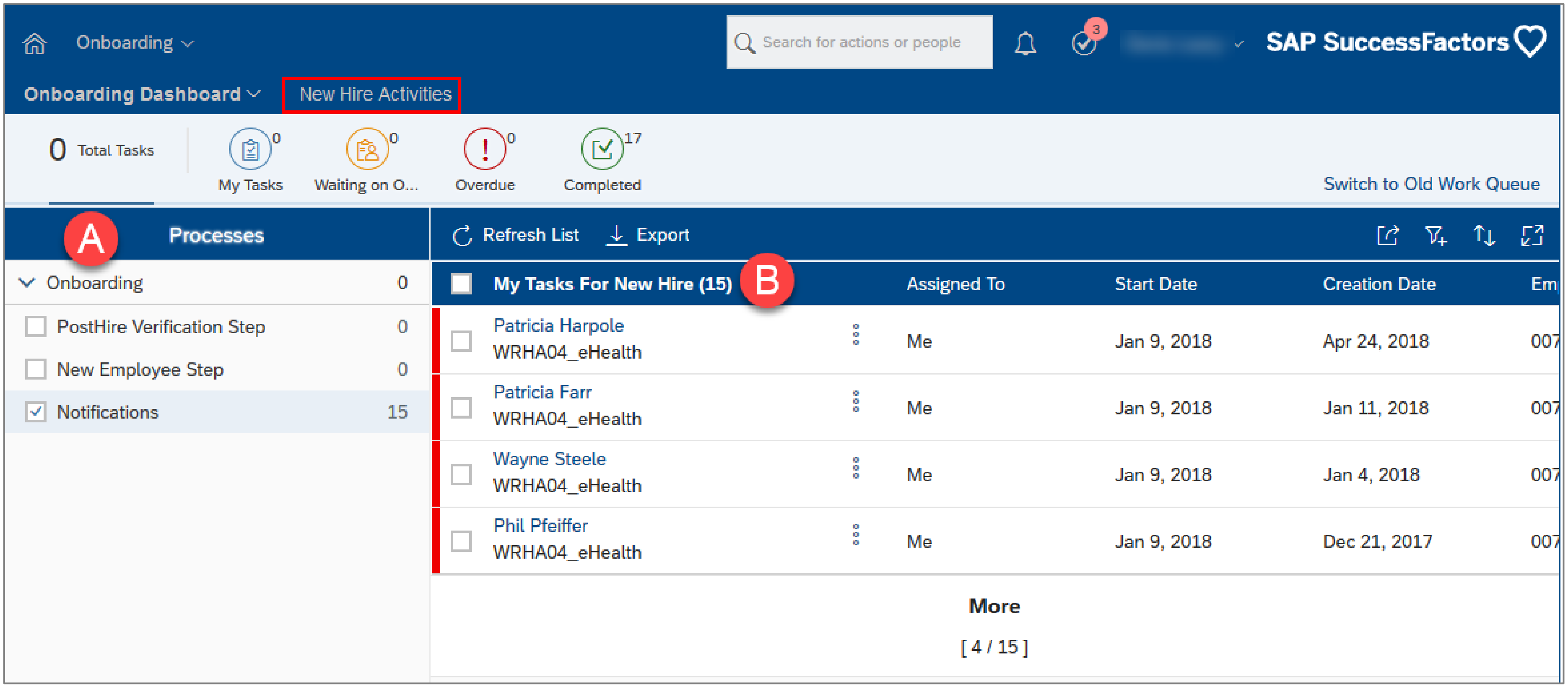
Note: This is a one-time process.



The updated Onboarding Dashboard screen layout now displays.

Note: The Onboarding Dashboard screen is viewable by Org Chiefs and HR Shared Services. For Org Chiefs, the screen should be used for display purposes only. Refer to the table on the next page for an explanation of screen information that may be useful.

3. Click **New Hire Activities**.



The following table provides the areas identified by letter from the screenshot on the previous page and the corresponding description.

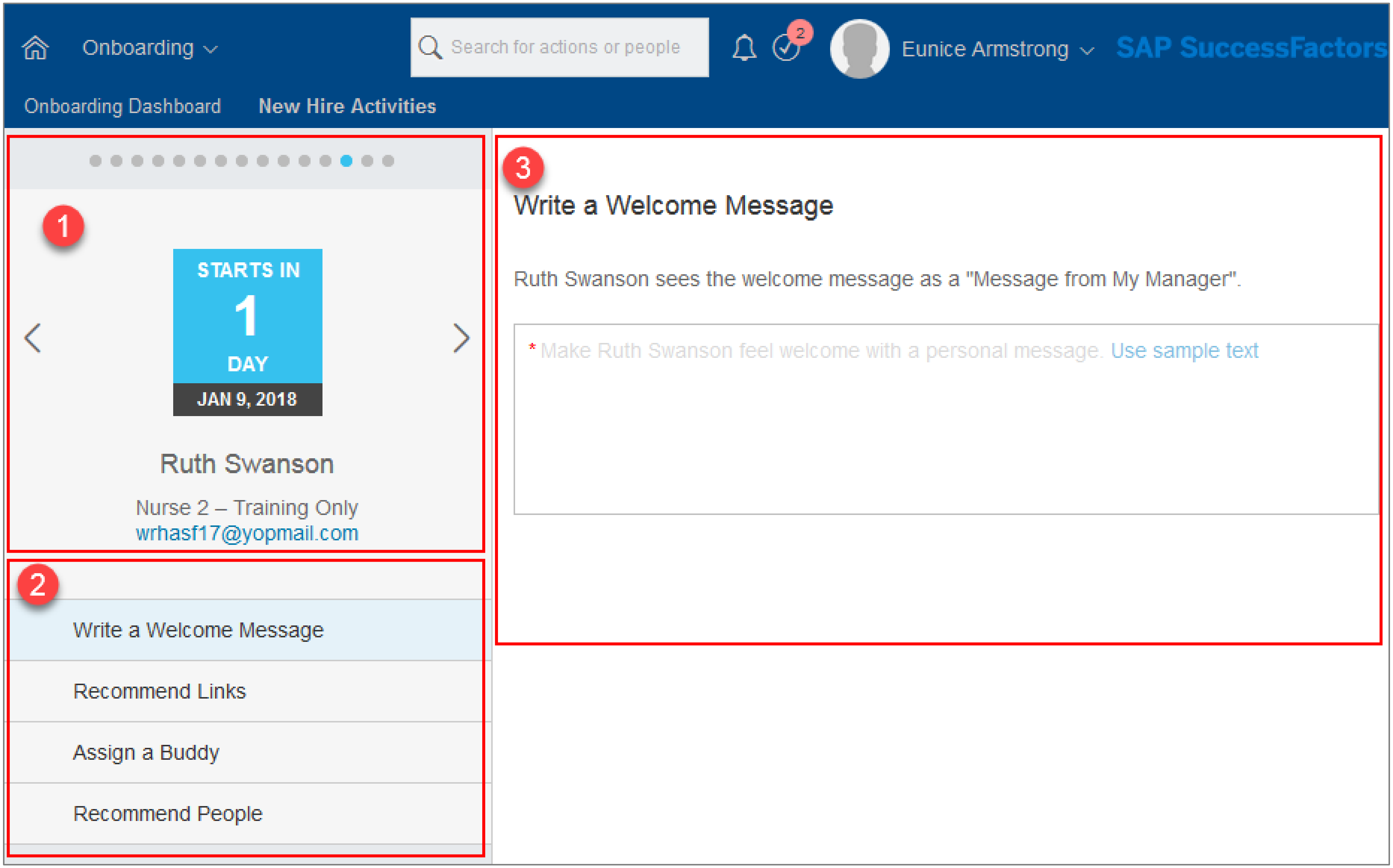
Area	Description

a	**Onboarding Status**
	Displays the current Onboarding status:
	• *PostHire Verification Step*: with HR Shared Services for Post Hire Verification processing. During this process, documents and forms applicable to the employee are identified (e.g. benefits forms), based on the nature of the hire.
	  ○ *Internals*: HR Shared Services selects the required forms based on the employee's current benefits.
	  ○ *Externals*: SuccessFactors determines which forms are required based on business rules (site, FTE, etc.).
	• *New Employee Step*: with the employee to complete required reading and forms (e.g. benefits, tax)
	• *Notifications*: notifications that have been sent to the employee and org chief
	
	Select or deselect the checkboxes beside each of the Onboarding statuses to filter the display of employees.

b	**Onboarding Employee List** List of employees belonging to the Org Chief who are currently in one of the Onboarding statuses.

The *New Hire Activities* screen appears.

Refer to the table on the next page for details about how the screen is organized.



The following table provides the areas identified by number from the screenshot on the previous page and the corresponding description.

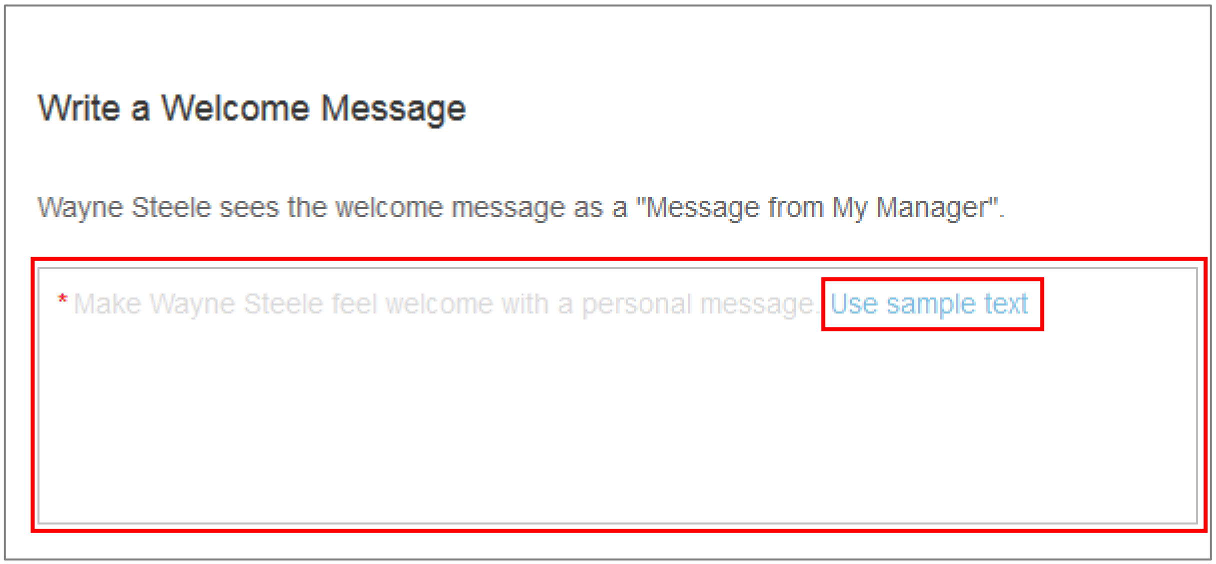
Note: The information created by the Org Chief will be accessible to the employee on their start date. Applicable network access and email credentials must be in place for the employee to access SuccessFactors.

Area	Description
1	**Onboarding Employee Carousel** Displays information about the currently selected employee, including, • Start Date • Name • Position • Email Click the < > buttons beside the employee information to move to another employee. “Archive” will appear above the employee information if the employee’s start date is in the past. **Note**: Employees for whom Onboarding does not apply will not appear (e.g. internal hire who is not required to complete benefit forms).
2	**Onboarding Activity List** List of optional onboarding activities that can be completed for an employee. Org chiefs can optionally complete one or more activities. Click an activity link for completion instructions: • Write a Welcome Message • Recommend Links • Assign a Buddy • Recommend People Click the name of the activity you want to complete to open the corresponding Activity Window. A green checkmark appears to the left of each activity that you complete.
3	**Activity Window** Displays the currently selected onboarding activity that is being completed.

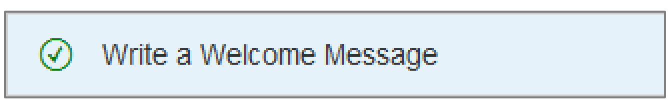
Write a Welcome Message

Write a message to your new employee that welcomes them to their new workplace.

1. Do one of the following:
   - Click the **Use sample text** link in the text box to auto-populate the field with a welcome message for the employee. You can also edit the auto-populated text to customize it.
   - Click in the text box to type your own customized message for the employee.
2. Click anywhere outside of the text box when you are finished.



A green checkmark appears beside the activity to indicate that it has been completed. The employee will see the welcome message in SuccessFactors.



Recommend Links

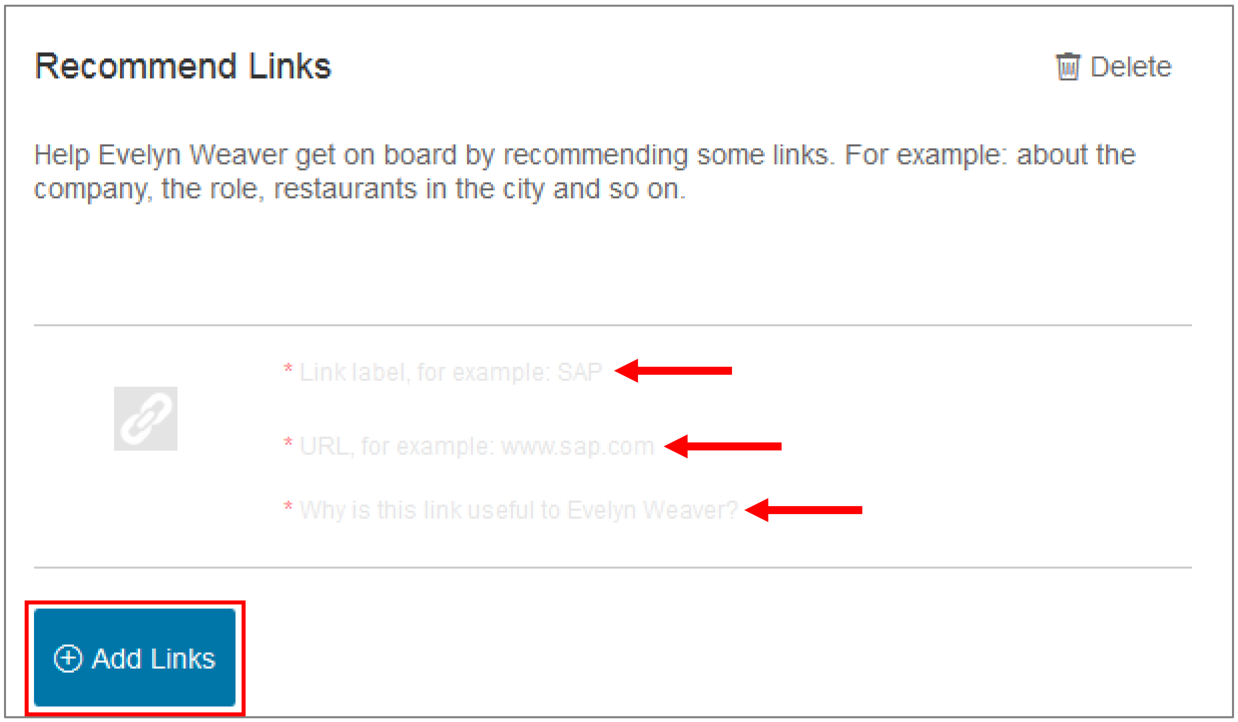
Recommend some useful links to your new employee to help them get started in their new position. For example, your site intranet, the WRHA Insite Intranet and/or the Shared Health Intranet.

1. Click **Add Links**.

- A link box opens that contains three text fields.

2. Click the **text beside each of the red asterisks** within the link information fields.

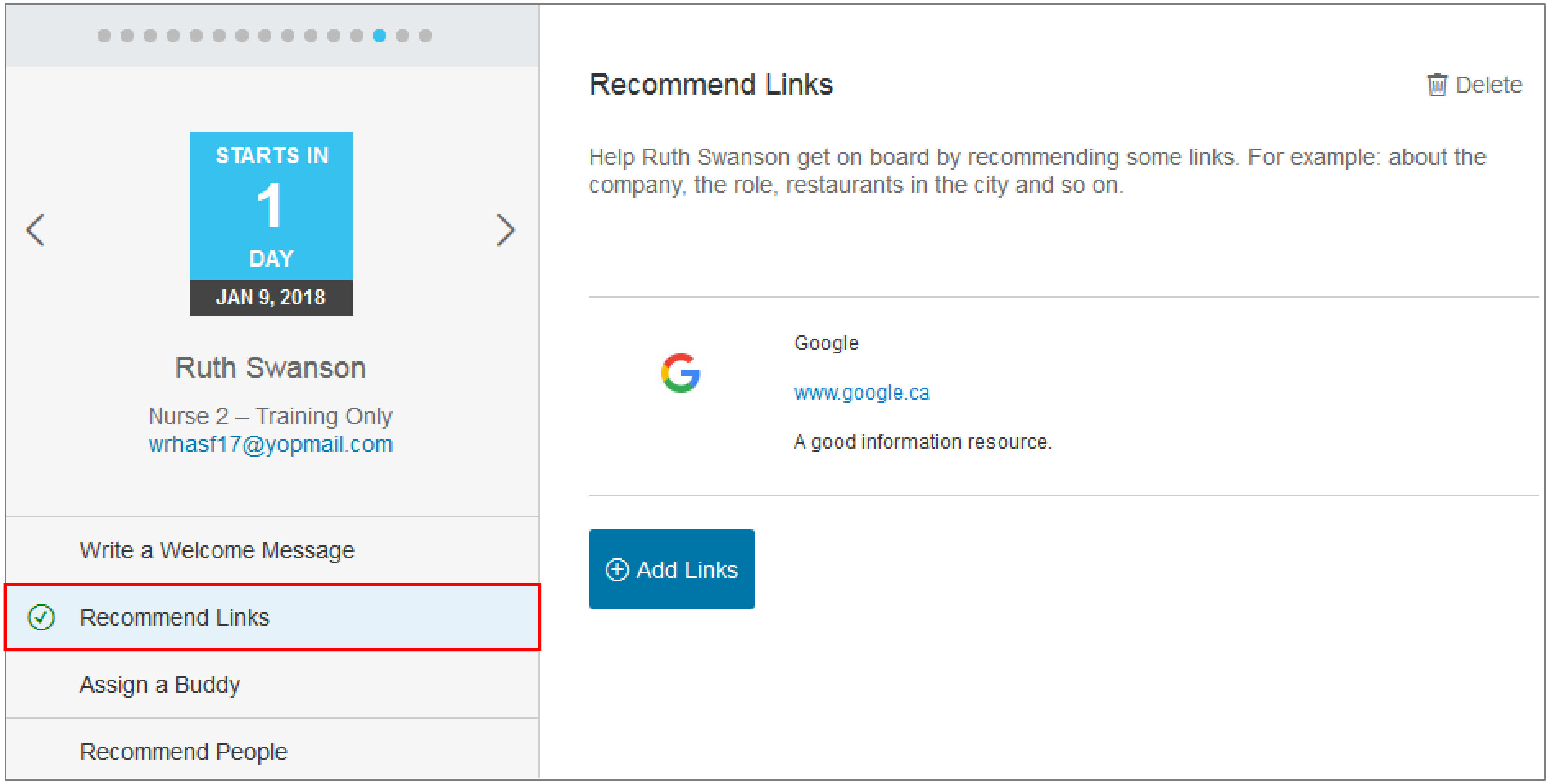
- *Link label, for example SAP*: enter the text you want to appear for the the hyperlink.
- *URL, for example, www.sap.com*: enter the web address (URL) for the hyperlink.
- *Why is this link useful to the employee*?: enter the reason you are recommending the link for the employee.



3. Click any where outside of the link box when you are finished.

A green checkmark appears beside the activity to indicate that it has been completed. The employee will see the link recommendation in SuccessFactors.

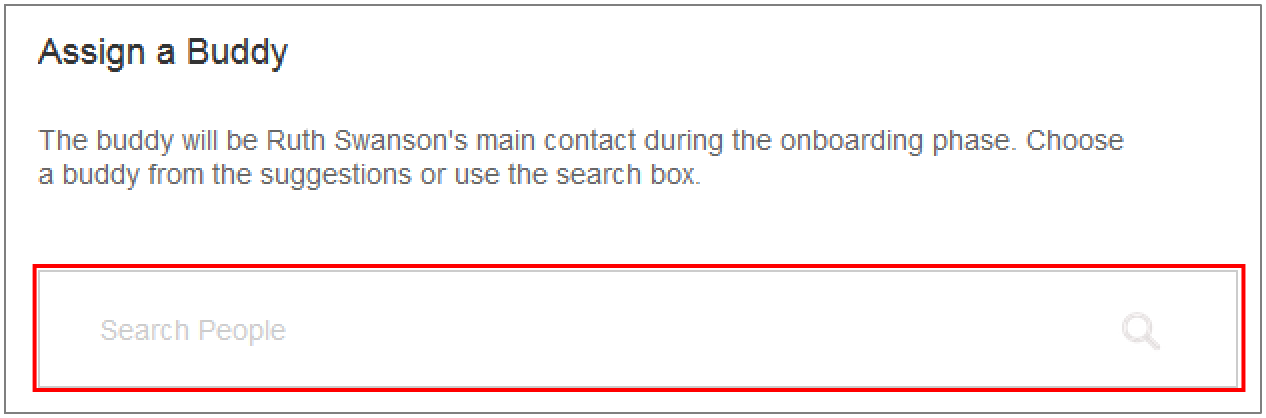
Note: You can click *Add Links* to recommend additional links. Click Delete if you want to delete the link.



Assign a Buddy

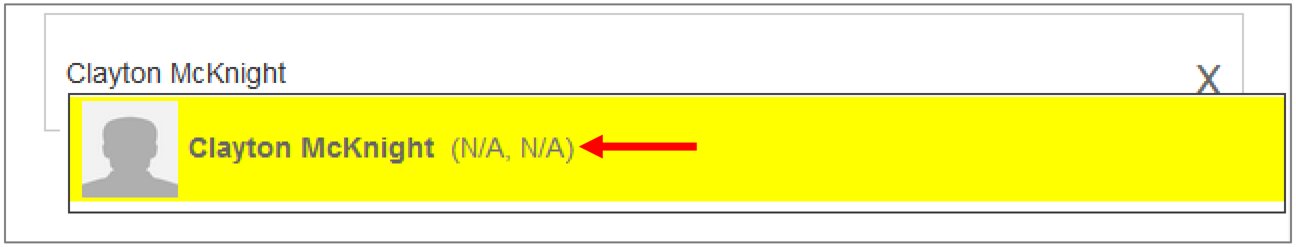
Assign a buddy who will reach out to your new employee, starting on the first day to help them get familiar with your team and workplace. This helps create a welcoming environment for your new employee and provides support to them and your team in transitioning as quickly as possible.

1. Click in the **Search People** text box.
2. Enter the **name** of the individual you are assigning as a buddy for the new employee.



Note: As you type, the system will propose names that match your criteria directly below the field. Continue typing until the individual's name appears.

3. Click the correct name.



A text box opens.

4. Enter information about **why you are assigning the selected individual** as a buddy for the employee.

5. Click anywhere outside of the text box when you are finished.

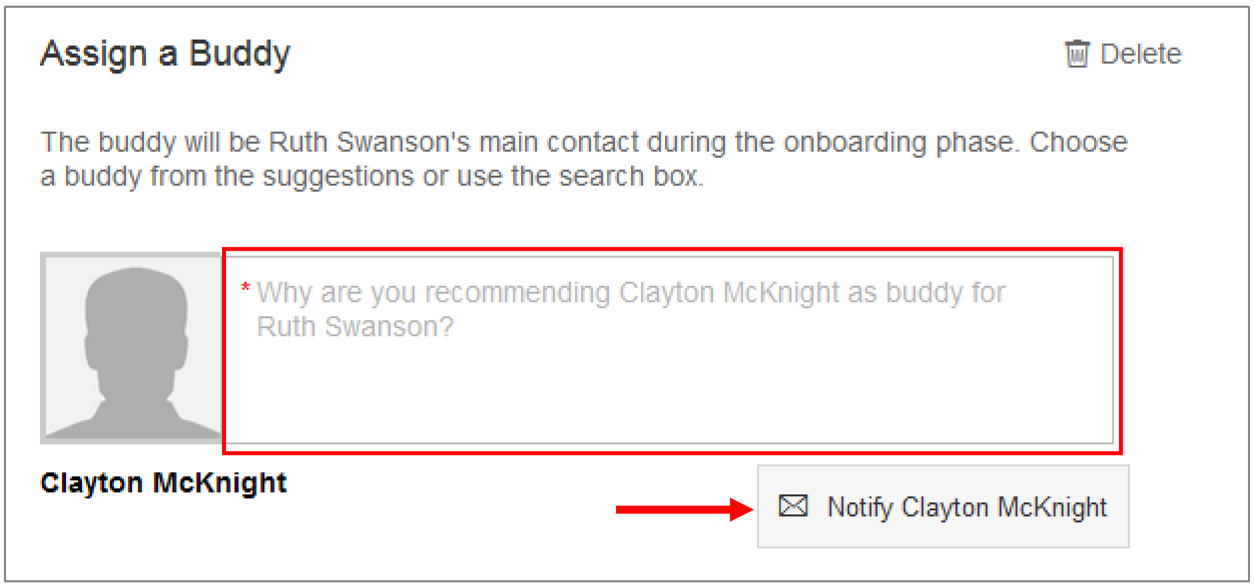
6. Click 

below the text box to send an email notification to the individual being assigned as a buddy.

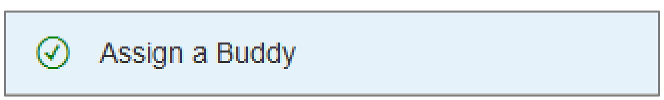
An Outlook email will be generated and displayed with pre-populated text for you to send to the buddy.

Note: You can click 

if you want to delete the buddy.



A green checkmark appears beside the activity to indicate that it has been completed. The employee will see the buddy information in SuccessFactors.

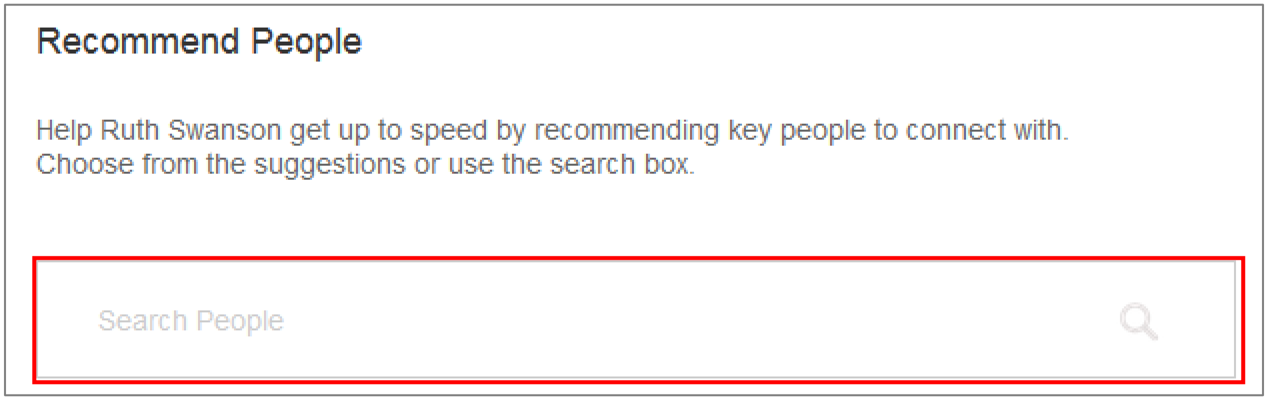


Recommend People

Recommend people for your new employee to meet so they can contact your new employee at their first opportunity. This helps your new employee feel welcome and transition efficiently into the workplace.

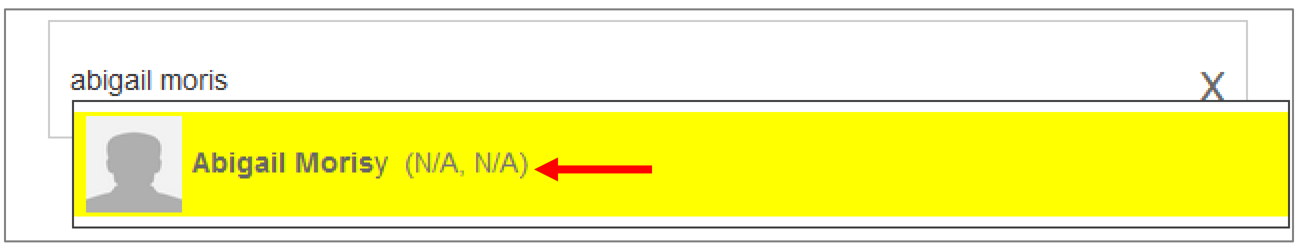
1. Click in the **Search People** text box.

2. Enter the **name** of the individual you are recommending for the new employee to connect with.



Note: As you type, the system will propose names that match your criteria directly below the field. Continue typing until the inidividual's name appears.

3. Click the correct name.



A text box opens.

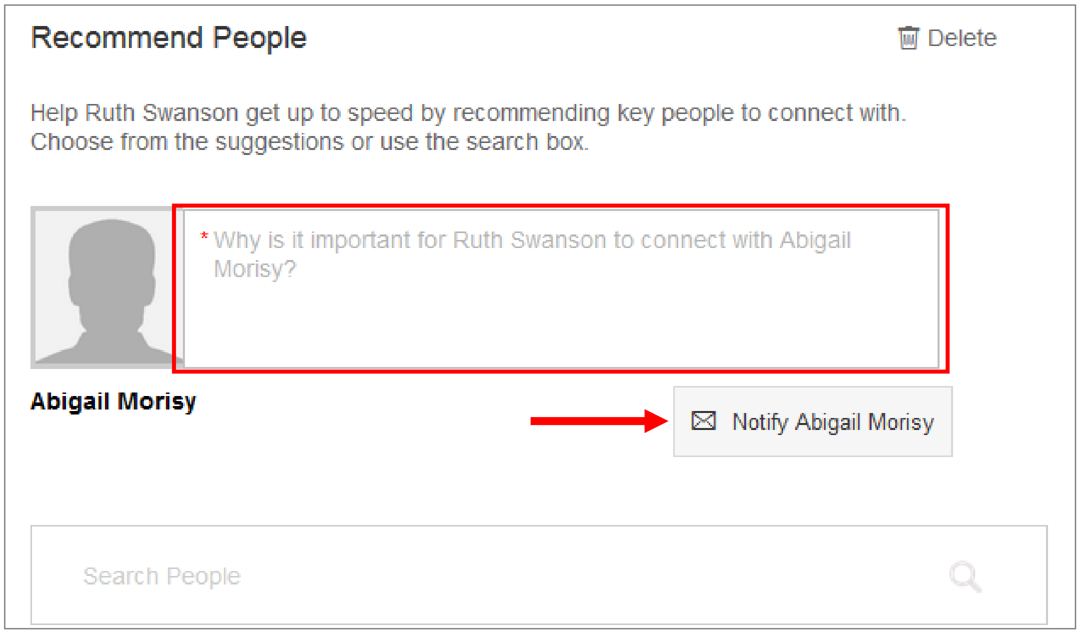
4. Enter information about **why you are recommending the selected individual** for the employee.

5. Click anywhere outside of the text box when you are finished.

6. Click 

below the text box to send an email notification to the individual being recommended.

An Outlook email will be generated and displayed with pre-populated text for you to send to the recommended individual.

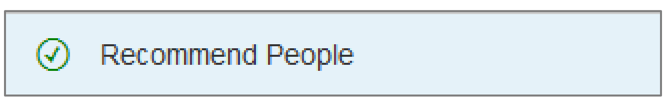


Note: You can click in the Search People text box to recommend additional individuals.

You can also click 

if you want to delete the recommendation.

A green checkmark appears beside the activity to indicate that it has been completed. The employee will see the recommendations in SuccessFactors.



Next Steps

The employee will see information in SuccessFactors related to any onboarding activities that have been completed by the Org Chief. The information created by the Org Chief will be accessible to the employee on their start date. Applicable network access and email credentials must be in place for the employee to access SuccessFactors. Refer to the Complete Account & Access Form for New Employee how-to for further information.