Taleo Enterprise Edition

Taleo Onboarding User Manual

Version 7.5

January 2009

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1 Introduction

About Taleo Onboarding

Taleo Onboarding speeds up time to contribution for new employees and contractors by streamlining and automating the onboarding process, while reducing excessive paperwork and improving policy and legal compliance. It bridges the gap between promise and productivity with tools such as the New Hire Portal, specialized correspondence, fully customizable forms and automated workflows.

This manual provides extensive information about Taleo Onboarding, information that will help users benefit fully from the software's many features and functions.

Symbols Used in the Manual


Information that merits particular attention.


A useful tip when performing a particular operation.


A best practice to adopt.

Pop-Up Blockers

Taleo advises not to use pop-up blockers as they might interfere with the system.

Navigating from the Staffing WebTop/Manager WebTop to Onboarding

Please note that as soon as you access Onboarding from the Staffing WebTop or the Manager WebTop, the session in the Staffing WebTop or the Manager WebTop is terminated.

Information Transfer Between Taleo Enterprise Edition and Onboarding

A subset of important candidate information is sent to Onboarding the first time an onboarding process is launched. If, afterwards, candidate information is modified and the same process or another process is launched, the new hire information will not be affected, only a change in Start Date from the Recruiting side is transferred automatically into Onboarding after their original transition into the Onboarding system.

Contact your Taleo consultant for more information about what specific subset of data transfers.

Navigating through Onboarding

Navigation Bar

The navigation bar contains links to various pages that are available no matter what your permissions are.

Help	Access to the online help.
Web Support	Access to online technical support.
About	Information about Onboarding.
Sign out	To exit the application.

Quick Access

The **Quick Access** pane contains direct links to pages that are relevant to where you are currently located in the application and the options offered to you from this point. The links offered in that pane vary according to your permissions and the context.

Recently Viewed Items

The **Recently Viewed Items** pane contains direct links to the last ten pages you most recently accessed (according to your permissions) during the current session or previous ones. It can be pages where you made modifications or simply pages that you accessed without making modifications. To access a recently viewed item, simply click the item.

Below is a description of the icons that can be displayed in the **Recently Viewed Items** pane according to your permissions:

Administration portal	Login	History
Wizard	Selector window	User information
Password policies	Company settings	Security permissions
Product settings	Roles and permissions	Document
HTML document	PDF document	Message
Message template	Correspondence	Paragraph
Custom selection	Form	Guide
New hire configuration	New hire portal	New resource
Resource administration	Response center	User-defined field
User-defined form	Task	Task step
Task definition	Task reminder	Transition
Routing step	Subprocess step	Process
Step	Condition	

Breadcrumb Trail

The breadcrumb trail located at the top of each page allows you to see where you are located within Onboarding, and to go back to previously viewed pages.

Onboarding WebTop > Super Annette Candidate > **Task - Starting Process Notification**

The breadcrumb trail is only available in navigation mode; it disappears when you are in editing mode.

Navigation Icons

When information is spread across multiple pages, the following navigation icons are displayed:

Icon	Definition
<<	Goes to the previous 10 pages. For example, if you see 31-40 out of 72, clicking this icon will bring you to pages 21-30.
<	Displays the previous page.
>	Displays the next page.
>>	Goes to the next 10 pages. For example, if you see 31-40 out of 72, clicking this icon will bring you to pages 41-50.

Links and Buttons

Some often-used links and buttons are described in the following tables:

Button	Definition
Refresh	Updates the information on the current page.
Delete	Deletes a specific element.
Save	In most cases, applies changes or selections you made and closes the displayed window.
Cancel	Cancels changes and closes the window.

Link	Definition
Create	Opens a creation page.
Edit	Opens a page for editing.
Preview	Opens a preview page.
More	Displays more items from a list.
Add	Adds an element to a list.
Reorder	Reorders elements in a list.
Send Correspondence	Opens the Correspondence Wizard. See "Correspondence Wizard" on page 1-10.

Selector Windows

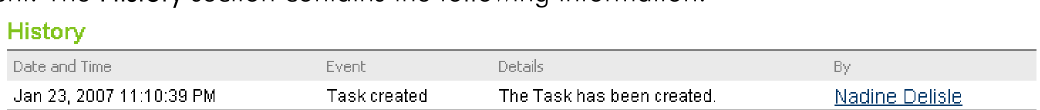
Selector windows are used throughout Onboarding. They allow you to select various elements according to where you are in the application. The type of selector window (single or multiple) varies according to the selection type. Selector windows contains filters allowing you to quickly find items in a list.

More info

Whenever a description is available below a page title, the **More info** link is displayed. This link gives you access to contextual online help.

History

The **History** section is used throughout Onboarding. It is used to present useful tracking details on an element. The **History** section contains the following information.


History

Date and Time	Event	Details	By
Jan 23, 2007 11:10:39 PM	Task created	The Task has been created.	Nadine Delisle

Date and Time	Date and time when an event occurred.
Event	The event or action performed on an element.
Details	Information regarding the event.
By	The "actor" (person or system) who performed the event. To obtain basic information about the "actor", click the actor's name.

The three most recent events are displayed in the **History** section. To view a more complete listing of events, click **More**.

Lists Sorting Method

Lists sorting are managed by Oracle. The following sorting methods are used:

- Binary sort
- Multilingual sort

Binary sort (i.e., ordering character strings based on their binary coded values) is based on the numeric values of the characters defined by the character encoding scheme. Binary sort is the fastest type of sort and produces good results for the English alphabet. Accented characters and punctuation are not considered.

Ascending Sort	blank space - (dash) -b a b c null
Descending Sort	null c b c -b - (dash) blank space

Multilingual sort is used when data is available in more than one language and when data is available in a single language other than English. Oracle evaluates multilingual sorts at different levels of precision. On the first level sort, accented characters and punctuation are ignored. Accented characters and punctuation are considered on the second level sort (for example, the words “multilingual” and “multi-lingual” are considered identical during the first level sort).

Ascending Sort	blank space - (dash) a b -b c null
Descending Sort	null c -b b a - (dash) blank space

Correspondence Wizard

The **Correspondence Wizard** is used throughout Onboarding. It allows you to send messages to users and new hires and to write messages using the HTML Editor.

No message templates are available. You can only create messages from scratch.

1. Click **Send correspondence**. The **Correspondence Wizard - Message Edition** page opens.
2. Fill the **From** and **To** fields. Enter recipient names in the **Cc** and **Bcc** fields, if applicable. Recipients in the **Cc** (carbon copy) and **Bcc** (blind carbon copy) fields also get the message; however, the names of the recipients in the **Bcc** field are not visible to other recipients. Separate names with a semicolon (;).
3. In the **Subject** field, type the subject of the message.
4. In the **Content** field, type the message using HTML Editor options.
5. Enter a reference or comments, if applicable.
6. Click **Continue**. The **Correspondence Wizard - Message Preview** page opens.
7. Review your message.
8. Click **Send**.

2 Using Onboarding

Accessing Onboarding

There are three ways to access Onboarding:

- From the Enterprise Edition Table of Content page
  Select Onboarding from the product listing window.

- From the Manager WebTop main menu
  Select Onboarding processes in the main menu.

- In the Staffing WebTop, from the My WebTop page
  Click one of the links available in the Onboarding section. Access to Onboarding depends on the user permissions granted by your system administrator.

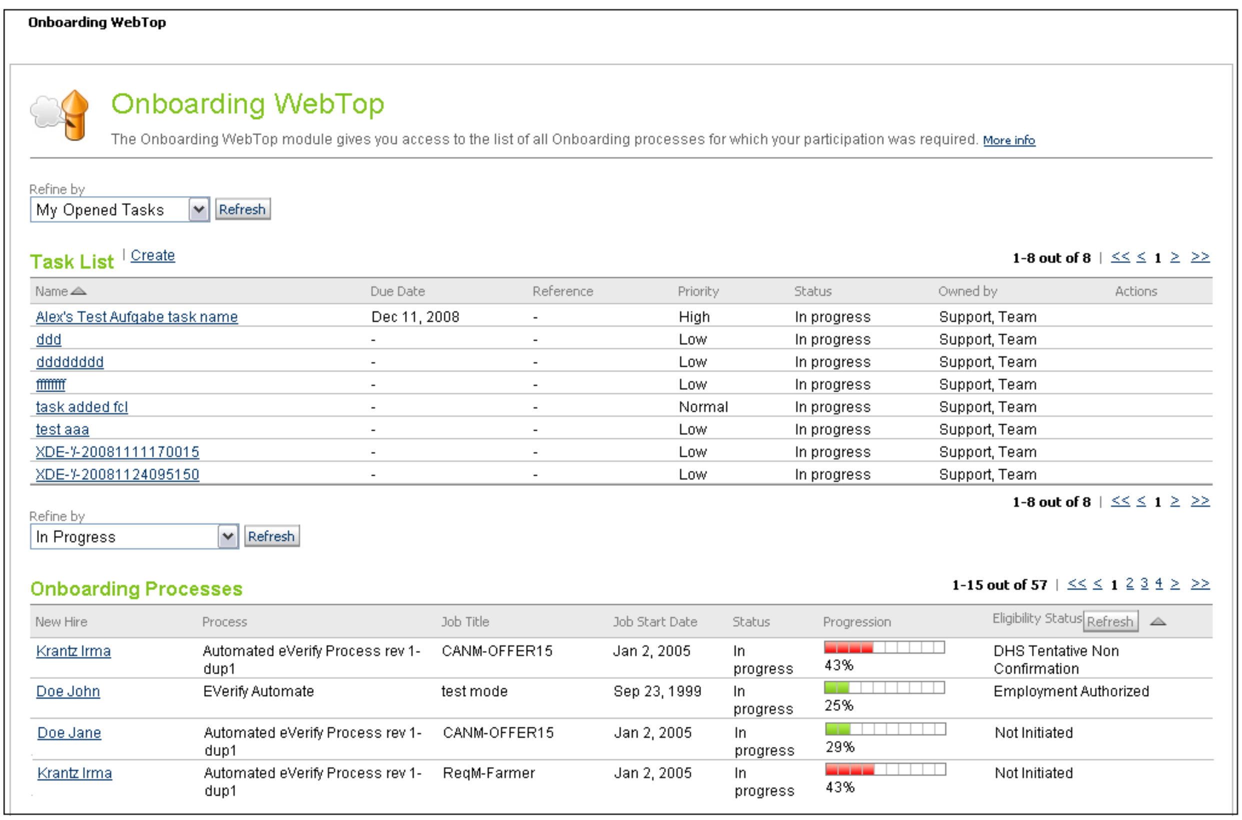
Description of the Onboarding WebTop Page

The Onboarding WebTop page provides the list of tasks assigned to you, tasks that you own and tasks that you have permission to see (for example, an HR director might have access to all tasks). A task is a request for action that can be assigned to an "actor" (person or system) involved in an onboarding process, including the new hire. Tasks can consist of filling out missing information, providing all the assets necessary to the new hire (email address, phone, computer, etc.), supervising the new hire, etc. A user with proper permissions can self-assign tasks. Tasks ensure that the onboarding process goes smoothly both for the new employee and the employer.

The Onboarding WebTop page also provides supervisors with general information about the onboarding processes they launched or are involved in. They can see the name of the new employee this process is associated with, the name of the process, the job title related to the process, the progression of the process, etc. They can also see the information regarding an Employment Eligibility Verification (E-Verify).

The Onboarding WebTop, used by the managers, recruiters and others who own processes or tasks, and who manage their progress through Onboarding is available in English, French, French-France and German.

It is also from this page that administrators can access the Administration module, which allows them to configure and manage various components such as correspondence, permissions, etc.



Task List

The list of tasks displayed in the Onboarding WebTop page reflects all tasks that were assigned to you.

To obtain details regarding a task, click the name of the task.

You can create tasks, but tasks you create will only be assigned to yourself. See "Creating a Task" on page 2-7.

Below is a description of the Task List columns:

Column	Description
Name	Name of the task.
Due Date	Date when the task must be completed.
Reference	Displays "Onboarding Process" when the task is created from an onboarding process. Displays a dash (-) when the task is a self-assigned task.
Priority	Level of priority for the task (Low, Medium, High).
Status	Status of the task. Available statuses are: • Completed: The task was completed with success. • In Progress: The task is in the process of being completed. • Not Started: The task has not started yet.
Owned by	Owner of the process who initiated the task, except for self-assigned tasks.
Actions	Possible actions to be performed.

Refine By

The information displayed in the Task List section varies according to what you select from the Refine by list. You can choose from:

Task	Description
My Opened Tasks	Displays opened tasks assigned to me.
My Tasks	Displays tasks assigned to me.
Due in the next week	Displays my tasks due next week.
Due Today	Displays my tasks due today.
Overdue	Displays my tasks that are overdue.
Keyword	Searches for a task using a keyword (searches through the columns **Name**, **Reference** and **Owned by**.

Onboarding Processes

The Onboarding Processes section shows you the list of all active onboarding processes to which you have access to.

If you click the name of a new hire in the New Hire column, you access the New Hire page. See "Accessing the New Hire Page" on page 2-16.

Below is a description of the Onboarding Processes columns:

Column	Description
New Hire	Name of the new hire associated with the process. Click the name of the new hire to access the **New Hire** page. See "Accessing the New Hire Page" on page 2-16.
Process	Name of the process.
Job Title	Job associated with the process.
Job Start Date	Date when the process was launched.
Status	Status of the process. Available statuses are: • Completed: The process was completed with success. • In Progress: The process is in the process of being completed. • Canceled: The process was ended before normal completion. • Not Started: The process has not started yet. • Suspended: The process was interrupted temporarily.
Progression	Level of completion of the process. See "Progression Bar" on page 2-5.

Refine By

The information displayed in the Onboarding Processes section varies according to what you select from the Refine by list. Once you clicked **Refresh**, the results show. You can choose from:

Column	Description
All	Displays all onboarding processes to which I have access according to my permissions.
In Progress	Displays onboarding processes that are in progress and to which I have access according to my permissions.
Suspended	Displays onboarding processes that were interrupted and to which I have access according to my permissions.
Canceled	Displays onboarding processes that were canceled and to which I have access according to my permissions.
Completed	Displays onboarding processes that were completed and to which I have access according to my permissions.
Pre Start Date	Displays onboarding processes that have started but for which the job start date has not been reached yet.

Post Start Date	Displays onboarding processes that have started but for which the Job Start Date in now in the past.
Delayed	Displays onboarding processes that were delayed.
Keyword	Searches for an onboarding process using a keyword (searches through the columns **New Hire**, **Process** and **Job Title**.
E-Verify Authorized	Displays onboarding processes for New Hires which received a status indicating that employment eligibility is verified and that the case may be resolved: the New Hire is authorized to work.
E-Verify Not Auth. (Final)	Displays onboarding processes for New Hires which received a status indicating that employment eligibility is verified and that the case may be resolved: the New Hire isn't authorized to work.
E-Verify Not Auth. (Tent.)	Displays onboarding processes for New Hires which received a status indicating that employment eligibility is verified and that the case cannot be resolved for the moment. Additional actions are required.
E-Verify All Pending	Displays onboarding processes with an E-Verify pending status.
E-Verify All Final	Displays onboarding processes with an E-Verify final status.

Progression Bar

A process consists of a series of steps, each with an assigned duration value (i.e., the time given to execute that step). Because a process may be defined with multiple workflow paths, connected by logical operators, the duration value for a process is assigned by the system. To calculate the duration of a process, two methods are used:

- If a process consists of two branches of steps performed in parallel and that the steps in both branches must be completed, the system will take the steps in both branches to calculate the duration of the process.
- If a process consists of two branches of steps performed in parallel but only the steps in one of the branch must be completed, the system will take the longest branch (i.e., the branch containing the most steps) to calculate the duration of the process.

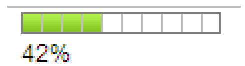
The progression bar is an approximate representation of the same duration value. It gives a visual indication of how the process is progressing. You can easily see how far the activity is from being completed.

The progression through a process is indicated by colored blocks appearing within the bar.

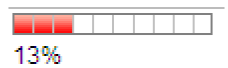
	Gray blocks indicate that the process progressed to this point, but had been canceled.
	Green blocks indicate that the process has no "in progress" task that is late compared to its due date. This is also represented by the percentage number below the bar.
	Red blocks indicate that a task is overdue.

When managing your processes in progress, you will be most concerned with two values: the green color indicating how much of the process has been completed successfully, and the red color indicating how much the process should have been completed (but has not been).

In the example below, 42% of the tasks were completed on time and the process is on track.



In the example below, 13% of the tasks were completed, but the process is late according to the planned schedule.



Eligibility Status

This columns indicates the status returned by E-Verify after their verification process. The status can either be temporary, meaning that it requires additional actions, or final.

Eligibility Status	Definition
Employment Authorized	A response received from either the Social Security Administration or the Department of Homeland Security indicating the information provided by the employer matched the information contained in the database(s) and work eligibility has been confirmed.
SSA or DSH Tentative Non Confirmation	The employee information was compared to Government records and could not be confirmed. This does not mean that the employee is not work authorized, or that the information provided was incorrect. The employee must contact either the Social Security Administration or the Department of Homeland Security to resolve the discrepancy in order to continue employment.
SSA or DSH Final Non Confirmation	If an employee's work eligibility cannot be confirmed, an employer will receive a Final Nonconfirmation response from the Social Security Administration or the Department of Homeland Security.

Creating a Task

If you have proper permissions, you can create tasks and assign these tasks to yourself.

1. In the Onboarding WebTop page, click Create located beside Task List. The New Task page opens.
2. Provide a name and general comments for the task. The Name and Code fields are mandatory.
3. Select a priority (low, normal or high).
4. Provide a due date using the calendar.
5. Click Save. The newly created task appears in the Task List section.

Sending a Notification

You can send a notification to the assignee and owner of the task to inform them that the task will be completed.

1. In the Onboarding WebTop page, click a task in the Task List. The Task page opens.
2. Click Edit next to Notifications. The Task Notification Editor opens.
3. Under Task Assignment Correspondence (sent to assignees), click Search to select the message that will be sent to the assignee.
4. Under Task Completion Correspondence (sent to owner), click Search to select the message that will be sent to the owner.
5. Click Save.

Adding a Reminder to a Task

You can configure a reminder regarding a task to send to yourself, the owner of the process or the task assignee(s).

1. In the Onboarding WebTop page, click a task in the Task List. The Task page opens.
2. Click Create located beside Reminders. The New Reminder page opens.
3. Specify who is the assignee.
4. Set a triggering time and unit. For example, 1 Day before due date.
5. Under Notification Message, click Search to select the message that will be sent.
6. Click Save. The reminder appears in the Reminders section.

Sending an Immediate Reminder

You can send an immediate reminder for important tasks that you don't want to miss or for tasks that are overdue.

1. In the **Onboarding WebTop** page, click a task in the **Task List**. The **Task** page opens.
2. Click **Send Immediate Reminder** located beside **Reminders**. The **New Reminder** page opens.
3. Select a notification message.
4. Click **Send**.

Completing a Manual Task

Completing a manual task means that the task is considered completed even though it was not carried out. For example, the hiring manager might have to make a call to welcome the new hire as a task. As the second step, the hiring manager would have to click **Complete** to indicate he did make the telephone call. Then the progress can move forward and the progression bar increases accordingly.

1. In the **Onboarding WebTop** page, click a task in the **Task List**. The **Task** page opens.
2. Click **Complete**.

Executing a Task: Filling in Forms

The action **Execute** is specifically available for tasks with user-defined forms. Every task completion moves the progression bar forward, including Send Correspondence tasks that are automatically completed when the time comes. See "Progression Bar" on page 2-5.

1. In the **Onboarding WebTop** page, click the **Execute** link corresponding to the task you wish to execute.
2. Provide the requested information.
3. Click **Save as draft** if you wish to save the information you provided (the information is saved in the system (not in the user file) and the task is still In Progress). It is possible to save the information even if mandatory fields were not completed.
4. Click **Submit** when the information you provided is final (the information is saved in the user file and the task become Completed). If mandatory fields are not completed, an error message will appear.

Once a task has been submitted, it cannot be modified anymore although the form it generated can be viewed and printed.

Accessing a Completed Form

Accessing a completed form allows you to view your data and print the form if needed.

1. Use the Refine By filter and select **My Tasks**. All your tasks are displayed.
2. Click the completed task associated to the form you wish to view. The **Task** Page opens.
3. Under the **Related Source** section, the form hyperlink is displayed.

If you don't see the **Related Source** section, you may not have the appropriate permissions. Contact your system administrator.

4. Click the hyperlink to display the form. The form shows read-only data that you provided.
5. Click **Print** if needed.

Open PDF Task

The Open PDF task allows the task assignee to view a PDF form with pre-filled data about the new hire. It is also a first step in exporting the form out of Onboarding with Taleo Connect for storage in an external system.

To open a PDF task:

1. In the **Onboarding WebTop** page, click the **Execute** link corresponding to the task you wish to execute. A popup window opens and you are asked to open the file or save it.

At this point, the task appears as completed and it is automatically associated to the new hire.

2. Click the name of the process containing the task you just executed. The **New Hire** page opens.
3. Notice that a new section **Attached Files** is now displayed with your generated forms.

Files can also be added manually by the user by clicking **Add** in the **Attached Files** section. You can delete a file from the list but it remains available through the **Related Source** link in the task.

If you don't see the **Attached Files** section, you may not have the appropriate permissions. Contact your system administrator.

Exporting PDF Files

PDF documents available under the **Attached Files** section can be exported to an external system through Taleo Connect. These personalized PDF documents contain new hire's specific information instead of the original variables. They can be managed once they are exported, for example into a document management system for reference or long-term storage.

There are a few things to consider regarding the export:

- New hire data is not intended to be stored permanently in Taleo Onboarding. It should be exported or stored in external systems within one year.
- A user must have the permission to view and manage related documents in order to see generated files in the list.

- It is not possible to export individuals files. When exporting through Taleo Connect, all files displayed under the Attached Files section will be exported at once.

Reassigning a Task

Reassigning a task means that you can modify the current task assignee, even if the process has begun. For instance, if an assignee in your process is unable to complete their task (or fails to do so for any reason) you can reassign the task to someone else.

1. In the Onboarding WebTop page, click the process containing the task that needs to be reassigned. The New Hire page opens.
2. In the Steps section, click the appropriate task. The Task page opens.
3. Click Reassign. The Reassign a Task page opens.
4. Modify the task assignee in the corresponding field.
5. Click Save. The new assignee now receives the assignment email.

Sending a Correspondence

Sending a correspondence allows you to send an email to the new hire in addition to the correspondences that are sent to tasks assignees within a new hire process. This functionality does not leverage the predefined message templates nor tokens nor roles.

To send the correspondence:

1. In the Onboarding WebTop page, click on the desired new hire in the Onboarding Processes section.
2. Click Send correspondence. The Correspondence Wizard - Message Edition opens.
3. The From and To fields are pre-filled.
4. Enter recipient names in the Cc and Bcc fields, if applicable. Recipients in the Cc (carbon copy) and Bcc (blind carbon copy) fields also get the message; however, the names of the recipients in the Bcc field are not visible to other recipients. Separate names with a semicolon (;).
5. In the Subject field, type the subject of the message.
6. In the Content field, type the message using HTML Editor options.
7. Enter a reference or comments, if applicable.
8. Click Continue. The Correspondence Wizard - Message Preview page opens.
9. Review your message.
10. Click Send.
11. The Subject and the Reference field are tracked in the History section at the bottom of the page.

Starting an E-Verify case manually

It is possible to start a case manually and it can be used in many situations. It can be used anytime for a New Hire who doesn't even have the whole E-Verify sub-process and System tasks in their process. This will send their currently known data over to E-Verify web services and open a case for them. Administrators then go directly into the E-Verify WebTop to watch and complete the whole rest of that case's E-Verify process manually, if desired.

However, there are some specific things to know regarding a manual start:

- Any case that is changed manually on the E-Verify web site directly will no longer communicate back to the Taleo Onboarding system automatically.
- All further actions need to be taken manually in the E-Verify web site.

Possible Manual Cases

In certain uncommon situations, it is necessary for the process owner to perform other manual actions directly at the E-Verify web site, as well as within the Onboarding WebTop. The following section explains these possible situations.

Review-and-Update

If the status is Review-and-Update, which is not a final status, it means that the New Hire visited the SSA office and they did change their official records. Now in order for Taleo Onboarding records to match with the updated government records, the changes must be made in a form.

1. A Resubmittal Form task is assigned in order to update the New Hire information.

The sub-process include a built-in form today however the graphic below shows the form that will be available in the next release. It is more complete, clearer and accurate. Since all forms can be customized, we suggest you make your own modifications to the actual form available in your zone if you wish to improve it and verify that the appropriate URL is inserted in the form.

To access the E-Verify WebTop, the task assignee must use the URL received with their E-Verify credentials (it differs from the URL used by Taleo Onboarding web services).
Also the task assignee must use their own account and password. Again, these are different than those used by the automated Taleo tasks.

2. Once logged in, they must find the appropriate case number and update the data.

The task assignee must also update the New Hire information in Onboarding to match with E-Verify, but not submit the form immediately. It is important to wait for the new status from E-Verify, incorporate it in the form and then submit the form. If you submit the form before receiving the correct status, the Onboarding process will close the New Hire’s case prematurely and their status in Onboarding will not match their true status in E-Verify.

The sequence of the steps mentioned in the form must be followed carefully.

Additional Manual Request

If the employer is still concerned even after a Employment Authorized status is returned, they may do an Additional Verification Request. However because Taleo Onboarding System task would automatically closed/resolved the case, they need to do this step manually by starting the case again otherwise the case will not be available for Additional Verification.

1. Click Start in the E-Verify section of the New Hire page. The same status Employment Authorized will be received.

In this step, the existing data about the New Hire is sent to E-Verify to start a new case and obtain a new case number. Since it is not part of the sub-process, nothing will automatically happen with this case. Manual action is required with E-Verify.

2. Then log in the E-Verify WebTop (with the new case number).

The task assignee must use their own account and password.

3. Now instead of manually click Submit Resolve Case, click Request Additional Verification.

You will need to check back with the E-Verify WebTop regularly until the new response is received because no communication on this new case will ever come into Taleo Onboarding.

After receiving back a status, if it is still Employment Authorized then no changes need to happen in Onboarding nor in the company: the New Hire can stay hired and working.

You should record the new final status in the personnel records for the New Hire, because the final status on the E-Verify web site doesn't come back in Onboarding after an additional verification request.

If the new status is not a final status (if it's a Tentative Non-Confirmation, for instance), then the manual process should be followed on the E-Verify WebTop. We recommend you manually attach any TNC documents to the New Hire's Onboarding process, print it and keep proceeding towards a final resolution.

If the final status comes back as Final Non-Confirmation then the New Hire should not be hired and the process should be canceled. Then the process owner can update the data to match in Onboarding if this is important to the customer.

Closing an E-Verify case manually

In many circumstances, the E-Verify system will drive a case until it reaches a resolution automatically. But in other situations, cases can also be closed manually with a specific closure code by the WebTop users (or by the task assignee).

Cases can be closed manually in the case where the New Hire's situation changes in the organization; the E-Verify system has no way to know about if. For instance, a New Hire might just not come back or they get terminated for some other reasons. When you close a case, it communicates back to the E-Verify system that the case is finished.

To close a case manually:

1. Click the name of the new hire. The **New Hire** page opens.
2. In the **E-Verify** section, in the drop-down, select a closure code option. Click **Close**.

Closure Code	
Self-Terminated	An employee quits or is terminated for reasons unrelated to employment eligibility status while the verification query is in process.
Invalid Query	It is useful for the task assignee to inform E-Verify that they no longer need to pursue this case because for instance a duplicate query was discovered after the query was sent or a query was sent with incorrect data.
Resolved Unauthorized/ Terminated	A employment is not authorized (SSA Final Non-Confirmation, DHS Final Non-Confirmation, or DHS No Show) or when a Tentative Non-Confirmation response is uncontested AND employment is terminated.
Resolved Authorized	An employee is authorized.
Employee Not Terminated	To notify the DHS that you are not terminating an employee who received a SSA Final Non-Confirmation, DHS Final Non-Confirmation, or DHS No Show response or who is not contesting a Tentative Non-Confirmation response.

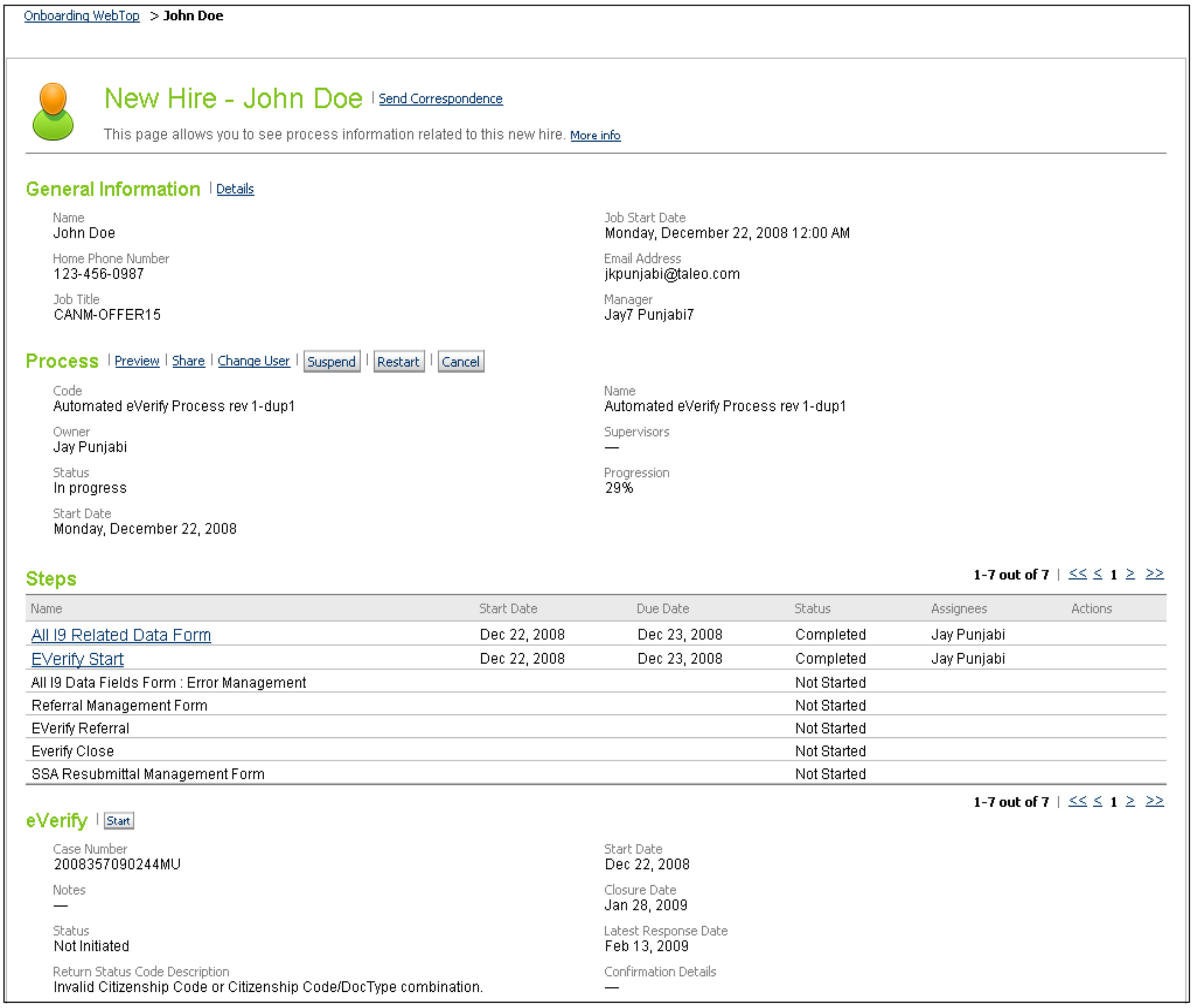
There is currently no way to choose a closure code option to be used by the System task which closes the case automatically with E-Verify but there will be enhancements made to support this situation in the future.

Accessing the New Hire Page

The New Hire page provides detailed information about the current onboarding process and steps related to a new hire. Information includes step status, start date, due date and assignees.

To access the New Hire page:

1. Click the name of a new hire in the **Onboarding Processes** section of the **Onboarding WebTop** page. The **New Hire** page opens.



Description of the New Hire Page

Send Correspondence

The Correspondence Wizard allows you to write a message. For more information, see "Sending a Correspondence" on page 2-12.

General Information

The General Information section contains data such as the employee's start date, the name of the manager, etc.

Process

The Process section displays the onboarding processes to which the new hire is associated, who is responsible for the processes, the start date of the processes and the percentage of the processes completed.

There are also a number of actions that you can perform if you have proper permissions. The following table describes these actions:

Action	Description
Preview	Displays a static image of the process.
Cancel	Cancels the process as well as all associated tasks.
Suspend	Temporarily suspends the process.
Share	Shares the process with another user. Shared users become supervisors.
Resume Process	Restarts the process that was temporarily suspended.
Revoke Process Sharing	No longer shares the process with a user.
Restart	Start the process (previously canceled) at the first step again, and re-executes all tasks. Re-executes the same process definition as a new process, acting on the same person and same job position/requisition/assignment. It will retain all the New Hire's existing information about Onboarding, without overwriting any changed values from Recruiting into Onboarding.
Change User	Allows you to change the manager and recruiters informationeven if the process is running. Tasks and email correspondence are then assigned to the right person if there is a management change in the company.

Steps

The Steps section shows closed steps as well all remaining onboarding steps to be completed (for example, completion of new hire forms, phone system installation, computer delivery and configuration, etc.) and the “actor” (person or system) responsible for completing that step (for example, recruiter, hiring manager, external system, etc.).

Below is a description of each of the Steps list columns.

Column	Description
Name	Name of the task associated with the process. Click the name to access the Task page. (Note: Routing tasks are not displayed with an hyperlink.)
Start Date	Date when the step was launched.
Due Date	Date when the step must be completed.
Status	Status of the step. Available statuses are: • Completed: The step was completed with success. • In Progress: The step is in the process of being completed. • Terminated: The step was ended before normal completion.
Assignees	Name of the “actors” (person or system) who must perform the step.
Actions	Actions regarding the step that can be performed.

E-Verify

The E-Verify section shows the details of the E-Verify process to allow the user knowing where it stands. This is also where a case can be started or closed manually. For more information, see

History

The History section shows all the completed activities to date. The History section is used throughout the Onboarding solution. It provides information such as the date and time of an event, a description and details on an event, as well as the “actor” (person or system) who performed the event.

The three last events are displayed in the History section. To view more events, click **More**.

For more information, see “History” on page 1-8.