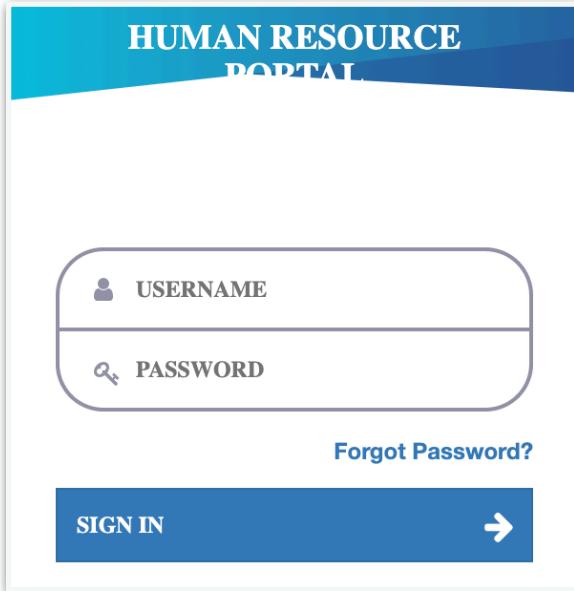


System:	Human Resource Information System	Date:	October 19, 2022
Portal URL	https://hr.hris-in-powermaccenter.com/	Name:	Onboarding Module

HR - HRIS > ONBOARDING

Setup employee's onboarding requirements as well as the checklist of things the company needs to prepare when the new employee arrives.

Where can I find this module?



- **SIGN IN**

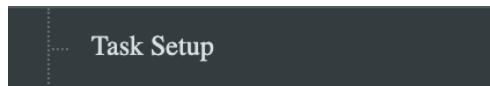
1. Go to <https://hr.hris-in-powermaccenter.com>
2. Enter your USERNAME and PASSWORD.
3. Click SIGN IN

4. On the left side of the HRIS Dashboard, click the **Onboarding** module.

There are 3 sub modules under Onboarding:



Setup employee's onboarding requirements as well as the checklist of things the company needs to prepare when the new employee arrives.



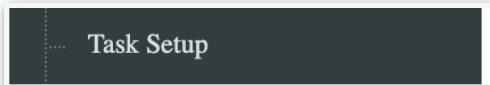
Define the tasks that can be part of the onboarding checklist



This is where you can classify the tasks into group to be the employee's checklist.



This is where you initiate a new onboarding checklist for a new employee, you can also check the progress of other onboarding employees.



Define the tasks that can be part of the onboarding checklist.

How to add a Task?

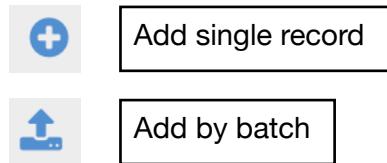
1. On the left part, click Onboarding > Task Setup

The screenshot shows the Onboarding Task Setup dashboard. On the left, a navigation menu is visible with 'Onboarding Task Set Up' highlighted. The main area displays several cards and charts. A red arrow points from the 'Task Setup' menu item to the 'Onboarding Task Set Up' card. Other cards include 'Manpower Complement' (a bar chart), 'Headcount by Employee Type' (a horizontal bar chart), 'Headcount by Length of Service' (a pie chart), 'Jan 1 - Nov 14' (a date range indicator), '0 Open Requests', '0 Documents Processed (YTD)', '0 Document for Claiming', 'Memorandum and Announcement' (with a note about no items on Whiteboard), and 'Task List' (with a note about no tasks on Whiteboard).

The screenshot shows the Task List page. The left sidebar has 'Search' highlighted. The main area is titled 'Edit List' and contains a table of tasks. A red box highlights the 'Edit' button at the top left of the table. A red arrow points from the 'Search' button in the sidebar to the 'Edit' button. Another red arrow points from the 'Delete' button in the table to the 'Delete' button in the 'Edit' header. A red box highlights the 'Add' button in the table. Red arrows point from the 'Refresh' and 'Add by batch' buttons at the bottom left to the 'Add' button in the table.

Task Code	Task Name	Assign to Employee	Task is mandatory	Require employee acknowledgement
GOV01	SSS No.	Yes	Yes	No
GOV02	PHILHEALTH No.	Yes	Yes	No
GOV03	TIN No.	Yes	Yes	No
GOV04	Endorsement	Yes	Yes	No
HRD1	Workstation	No	Yes	No
TECH1	Access IDs	No	Yes	Yes
TECH2	Access IDs	No	Yes	Yes
PAY01	For those with Outstanding SSS Loan	Yes	Yes	No
BIR Form 2316		Yes	Yes	No
Bank Account		Yes	Yes	No
OSH	Physical Exam	Yes	Yes	No
OSH	OSH Orientation	Yes	Yes	Yes
HRD2		No	Yes	No
HRD3	Orientation	No	Yes	No

2 Ways Adding a Task



Add single record

A. Click “Add” button

The screenshot shows the Onboarding Task List page. The grid displays various tasks with columns for Task Code, Task Name, Assign to Employee, Task is mandatory, and Require employee acknowledgement. The 'Add' button is located at the bottom left of the grid.

Task Code	Task Name	Assign to Employee	Task is mandatory	Require employee acknowledgement
GOV01	SSS No.	Yes	Yes	No
GOV02	PHILHEALTH No.	Yes	Yes	No
GOV03	TIN	Yes	Yes	No
GOV04	PAGIBIG No.	Yes	Yes	No
HRD1	Endorsement	No	Yes	No
TECH2	Access IDs	No	Yes	Yes
PAY01	For those with Outstanding SSS Loan	Yes	Yes	No
PAY02	BIR Form 2316	Yes	Yes	No
PAY03	Bank Account	Yes	Yes	No
OSH	Physical Exam	Yes	Yes	No
HRD2	Orientation	Yes	Yes	Yes
HRD3	Orientation	No	Yes	No
HRD4	Employee Profile Update	Yes	Yes	Yes

B. Fill up the fields.

You may add other categories here

Task List »

Task Code: REQ1

Task Name: 2x2 PICTURE

Task Description:

A Tl B I S U 
2x2 Picture Formal Attire with White Background

Task Category: INITIAL REQUIREMENTS  

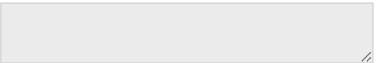
Timing: Before First Day 

Standard

Task is mandatory

Assign to Employee

Require employee acknowledgement



 Input  Output

Document Name	Review Criteria	Link To Upload File	File Name

   Page 1 of 0 | 15  No records to view

C. On the bottom part, upload an input if there's any. (Documents to be uploaded like form, instructions, etc.), click “Add” under Input tab.

 Input 

Document Name	Review Criteria	Link To Upload File	File Name

   Page 1 of 0 | 15  No records to view

 Save 

D. Fill up fields and choose file to be attached.

E. Click “Add” button.

Input

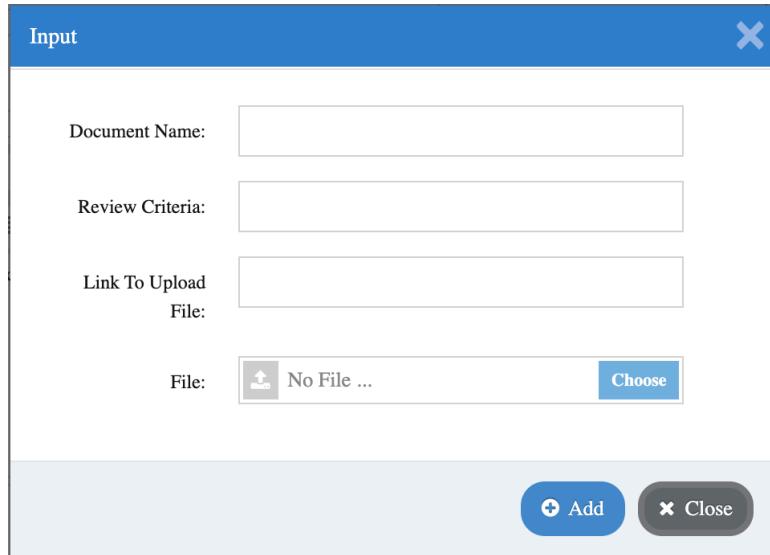
Document Name:

Review Criteria:

Link To Upload File:

File: Choose

Add Close



F. Go to “Output” tab.

G. Enter the Document Name and its Description (this is the file name expected to be uploaded by the employee)

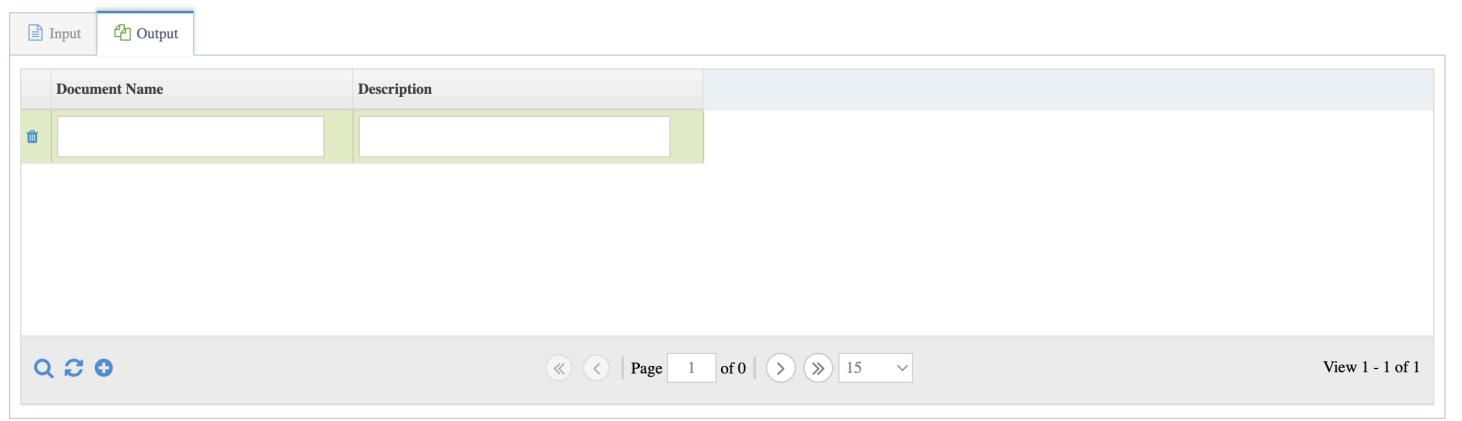
H. Click “Save” when done.

Input Output

Document Name	Description
<input type="text"/>	<input type="text"/>

Page 1 of 0 | 15 View 1 - 1 of 1

Save Close



This will now appear on the Task List.

Onboarding > Task List

Task List »

	Task Code	Task Name	Assign to Employee	Task is mandatory	Require employee acknowledgement	
	HRD11	Recruitment	No	No	No	
	REQ1	2x2 Picture	No	Yes	No	
	REQ2	2x2 picture	No	No	No	



Add by batch

A. Click the “Add by Batch” button, this will allow you to upload multiple tasks at a time.

Onboarding > Task List

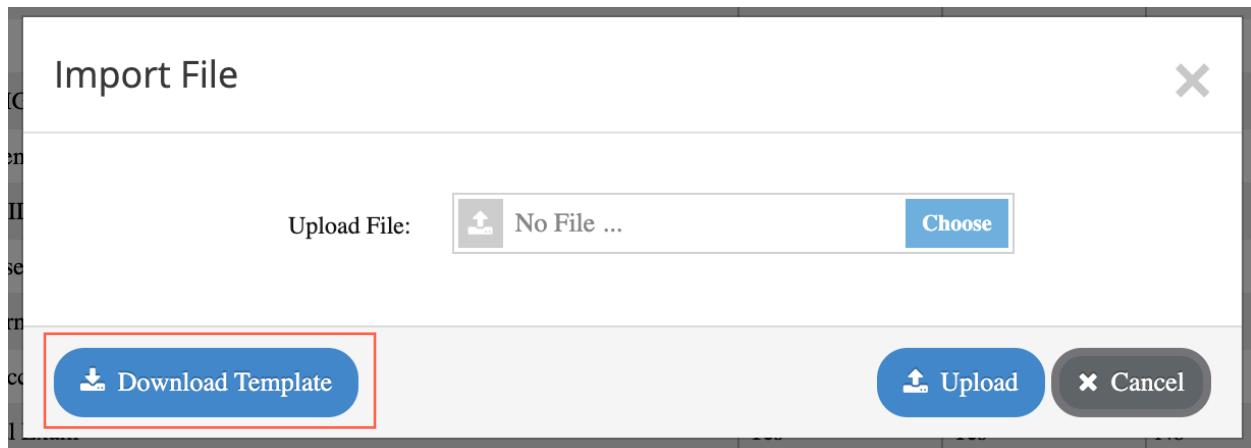
Task List »

	Task Code	Task Name	Assign to Employee	Task is mandatory	Require employee acknowledgement	
	GOV01	SSS No.	Yes	Yes	No	
	GOV02	PHILHEALTH No.	Yes	Yes	No	
	GOV03	TIN	Yes	Yes	No	
	GOV04	PAGIBIG No.	Yes	Yes	No	
	HRD1	Endorsement	No	Yes	No	
	TECH2	Access IDs	No	Yes	Yes	
	PAY01	For those with Outstanding SSS Loan	Yes	Yes	No	
	PAY02	BIR Form 2316	Yes	Yes	No	
	PAY03	Bank Account	Yes	Yes	No	
	OSH	Physical Exam	Yes	Yes	No	
	HRD2	Orientation	Yes	Yes	Yes	
	HRD3	Orientation	No	Yes	No	
	HRD4	Employee Profile Update	Yes	Yes	Yes	



Page 1 of 2 | 15

B. Click “Download Template” button to get the template file.



C. Open the template file on Excel and fill up columns. (Some columns has options, you may click the dropdown button on the side to choose.)

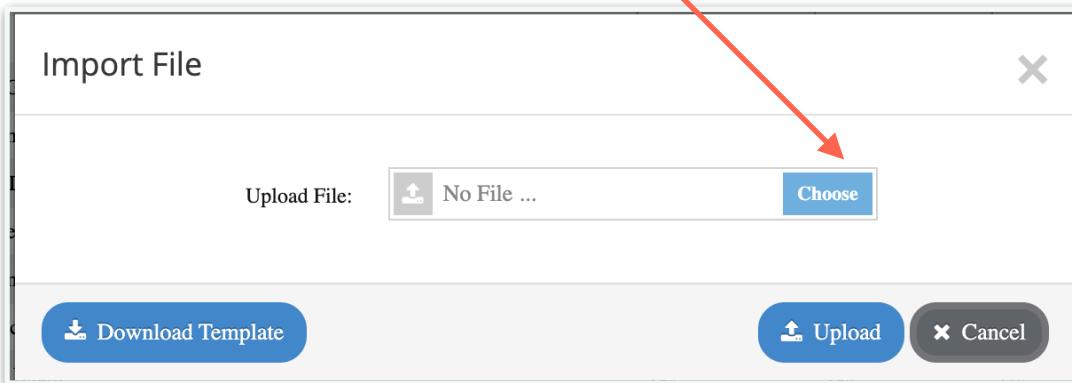
A screenshot of an Excel spreadsheet titled "Task". The spreadsheet has a header row with columns: Code, Name, Description, Task Category, Timing, Standard, Task is Mandatory, Assign To Employee, Required Acknowledgement, and Acknowledgement Remarks. Rows 2 and 3 contain data: Row 2 has REQ3 and New Employee Form; Row 3 has PhilSys ID, SSS ID, Umid ID and Accomplished Employee Form. In the "Task Category" column for row 4, a dropdown menu is open, showing a list of task categories: HR TASK, INITIAL REQUIREMENTS, INITIAL TASKS, Offboarding, Optional Tasks, PERFORMANCE TASK, and PREPARATION TASKS. The Excel ribbon at the top shows various tabs like Home, Insert, Draw, etc., and the formula bar shows "D3".

Please take note that there are 3 sheets within this spreadsheet. Fill out the task Input and Output if there is any.

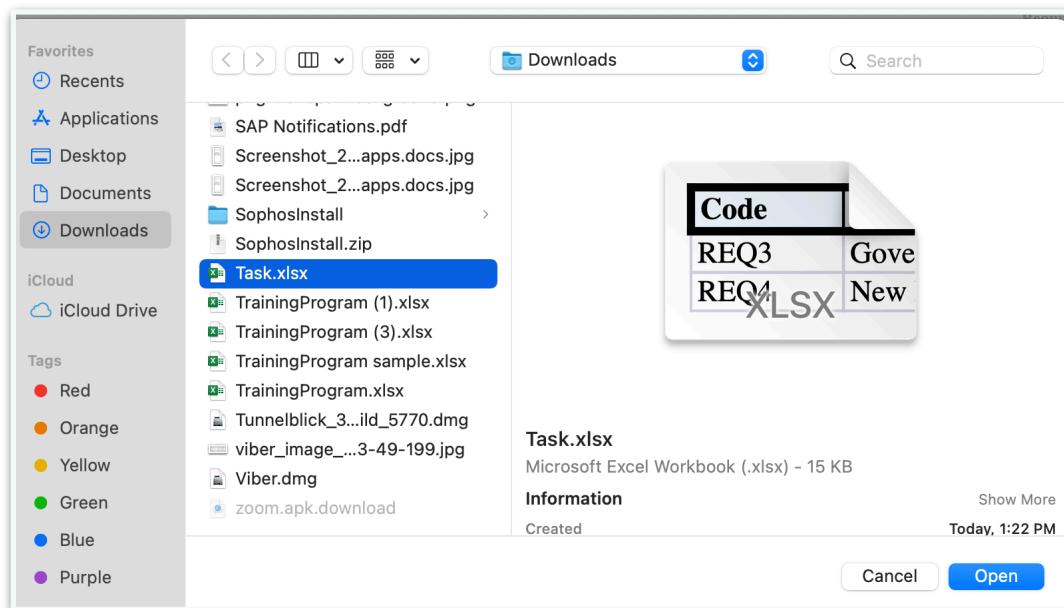


D. Save the file.

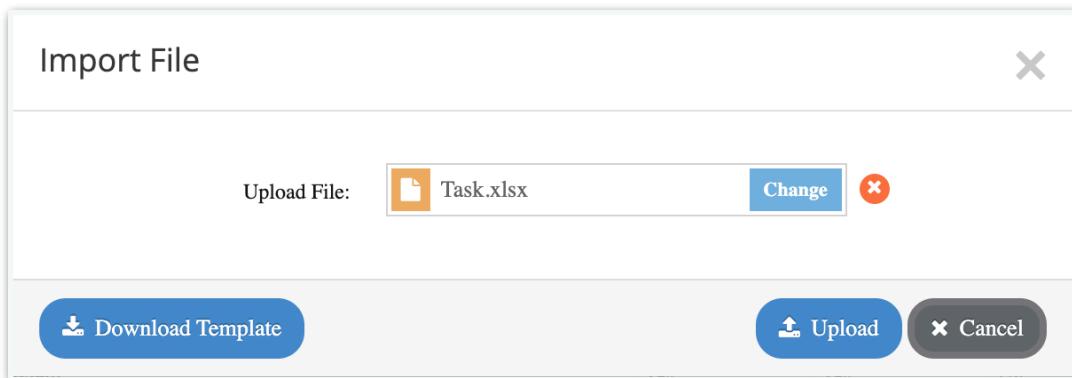
E. Back to the HRIS System, click the “Choose” icon to upload the file.



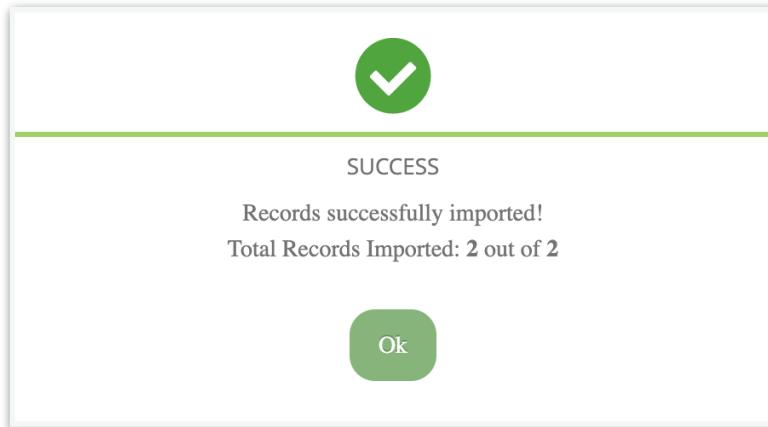
F. Choose the file and click “Open”



G. Click the “Upload” button.



This will show once adding is a success.



Newly added task will now appear here.

Task List »						
	Task Code	Task Name	Assign to Employee	Task is mandatory	Require employee acknowledgement	
	HRD11	Recruitment	No	No	No	
	REQ1	2x2 Picture	No	Yes	No	
	REQ2	2x2 picture	No	No	No	
	REQ3	Government ID	Yes	Yes	No	
	REQ4	New Employee Form	No	No	No	

Onboarding Task Set Up

This is where you can classify the tasks into group to be the employee's checklist.

1. On the left part, click Onboarding > Onboarding Task Setup

The screenshot shows the Onboarding Task Set Up page. On the left, there is a navigation sidebar with categories like Talent Acquisition, Onboarding, Task Setup, and Employee Onboarding. The 'Onboarding Task Set Up' option is highlighted with a red box and has a red arrow pointing to it from the previous step. The main area features a dashboard with three yellow boxes: '36 Open Requests', '0 Documents Processed (YTD) Jan 1 - Nov 14', and '0 Document for Claiming'. Below the dashboard is a bar chart titled 'Manpower Complement' showing headcount by employee type. There are also two smaller charts: 'Headcount by Employee Type' and 'Headcount by Length of Service'. To the right, there are sections for 'Memorandum and Announcement' (with a 'No items on Whiteboard' message) and 'Task List' (with a 'View Unrouted Trans...' link).

2. Click the “Add” button to create group of tasks / Checklist.

The screenshot shows the Onboarding Task Set Up List page. The left sidebar is identical to the previous screen. The main area displays a table titled 'Onboarding Task Set Up List' with columns 'Checklist Name' and 'Purpose'. It contains two entries: 'New Hire' (Fixed Asset) and 'Requirements' (Document Requirements). At the bottom of the table, there is a row of buttons: a magnifying glass for search, a circular arrow for refresh, and a blue plus sign for adding new items. A red arrow points down to the 'Add' button from the previous step.

3. Fill out the left side and choose the scope for this checklist (you may choose it per Department / per Position / PER Job Level).

4. Add tasks to the checklist, click (+) to add new task. Or you may copy tasks from other existing checklist by clicking the List button.

The screenshot shows the 'Onboarding Task Set Up' page. On the left, there's a form with fields for 'Checklist Name' (Required Documents) and 'Purpose' (For government mandated benefits and contributions). Below these are tabs for 'Scope' (Department selected), 'Position', and 'Job Level'. Under 'Scope', a list of roles is checked: Select All, Account Manager, Administration Assistant, Administrative Assistant, Area Manager, Assistant Supervisor, and Assistant Brand Manager. To the right is a table header row with columns for 'Code', 'Prerequisite', and 'Due In'. At the bottom of the main area are buttons for 'Add task' (with a red arrow pointing to it), 'Copy from existing checklist' (with a red arrow pointing to it), and standard search/filter controls. The status bar at the bottom indicates 'No records to view'. At the very bottom are 'Save' and 'Close' buttons.



ADD BUTTON

A. After clicking the add button, a new window will appear. Select the task code that you want to include in the checklist.

This is a modal dialog titled 'Task'. It contains a search bar and a dropdown menu labeled 'Task: Please select'. A list of task codes is shown: GOV04, HRD1, HRD11, HRD2, HRD3, HRD4 (which is highlighted with a blue background), HRD5, OSH, PAY01, and PAY02. Below the list is a checkbox labeled 'Assign to Employee'. At the bottom right of the dialog is a checkbox for 'Require employee acknowledgement'. The dialog has a standard window title bar with 'Save' and 'Close' buttons.

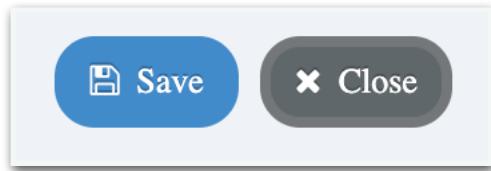
The screenshot shows the 'Onboarding Task Set Up' page. A blue callout box highlights the 'Task' section, which includes fields for 'Task Description' (with a rich text editor), 'Prerequisite' (a dropdown menu), and 'Due In' (a date input field). Another blue callout box points to the 'Prerequisite' dropdown with the text 'Select if there is a prerequisite task'. A third blue callout box points to the 'Due In' field with the text 'Enter when the task has to be completed'. A fourth blue callout box points to the 'Task Description' rich text editor with the text 'Input and Output Details are also automatically filled-up based on the Task Set Up'. A fifth blue callout box points to the 'Task' dropdown with the text 'Other details are automatically filled-up based on the Task Set Up'.

Sample:

This screenshot shows a task configuration window for a task named 'REQ2'. The 'Task Description' field contains the text 'Formal Attire Picture with white background'. The 'Prerequisite' dropdown is set to 'Please select'. Under 'Due In', the value '15' is entered with the unit 'days'. The 'Assign to Employee' and 'Task is mandatory' checkboxes are checked. The 'Input' tab is selected in the document list at the bottom. The document list table has two rows:

Document Name	Description
2x2.jpeg	picture

B. Once done, click “Save” on the right bottom part.



C. Add until you complete the tasks needed.

D. Once completed, you may now click “Save”.

Onboarding Task Set Up »

Checklist Name: Required Documents

Purpose: Gather required documents

Scope

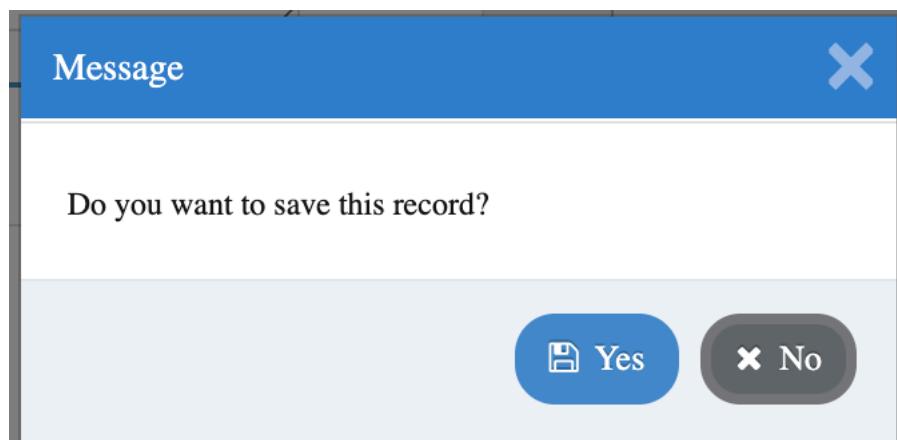
Department Position Job Level

Code	Prerequisite	Due In
GOV03		5 day(s) !
HRD4		15 day(s) !
HRD2		15 day(s) !
REQ2		15 (days) !

View 1 - 4 of 4

Save Close

E. Click “Yes” to proceed on saving the record.



This should now appear on the list.

Onboarding > Onboarding Task Set Up List		
Onboarding Task Set Up List »		
	Checklist Name	Purpose
 	New Hire	Fixed Asset
 	Requirements	Document Requirements
 	Required Documents	Gather required documents



COPY FROM EXISTING CHECKLIST

A. After clicking the “Copy From Existing Checklist” button, this window will appear. Click on checklist that you want to copy tasks inside.

Select From Check List Below X

Surrender Item List
Surrender Item List

HMO
Surrender HMO

New Hire
Fixed Asset

Requirements
Document Requirements

Required Documents
Gather required documents

B. The tasks inside the chosen checklist will now be added here.
You can add more task by clicking (+) button

The screenshot shows the 'Onboarding Task Set Up' page. At the top, there are fields for 'Checklist Name' (REQUIREMENTS2) and 'Purpose' (Requirements). To the right is a table listing tasks:

	Code	Prerequisite	Due In
	GOV03		5 day(s)
	HRD4		15 day(s)
	HRD2		15 day(s)
	REQ2		15 day(s)

A red arrow points from the text 'RED ICON - no need to set, the new employee itself will do the task (ex.NBI, Government IDs. Etc.)' to the first three rows. A green arrow points from the text 'GREEN ICON - you need to assign an employee to do the task (ex. For preparing the workstation of the employee (admin employee), install needed softwares, IP and etc. (IT employee))' to the last row.

Scope

- Select All
- Account Manager
- Administration Assistant
- Administrative Assistant
- Area Manager
- Assistant Supervisor
- Assistant Brand Manager

At the bottom right are 'Save' and 'Close' buttons.

C. Click on with color green icon to assign an employee for this task.

D. Click (+) button to add an employee assigned to check this task.

The screenshot shows the 'Task Assignment' dialog box. It has a search bar at the top and a table below it. At the bottom are 'Add Employees' and 'Close' buttons.

Task Assignment

Employee

No records to view

Page 1 of 0 | 15

Add Employees Close

E. Tick checkbox of the assigned employee and then click the (+) button to add.

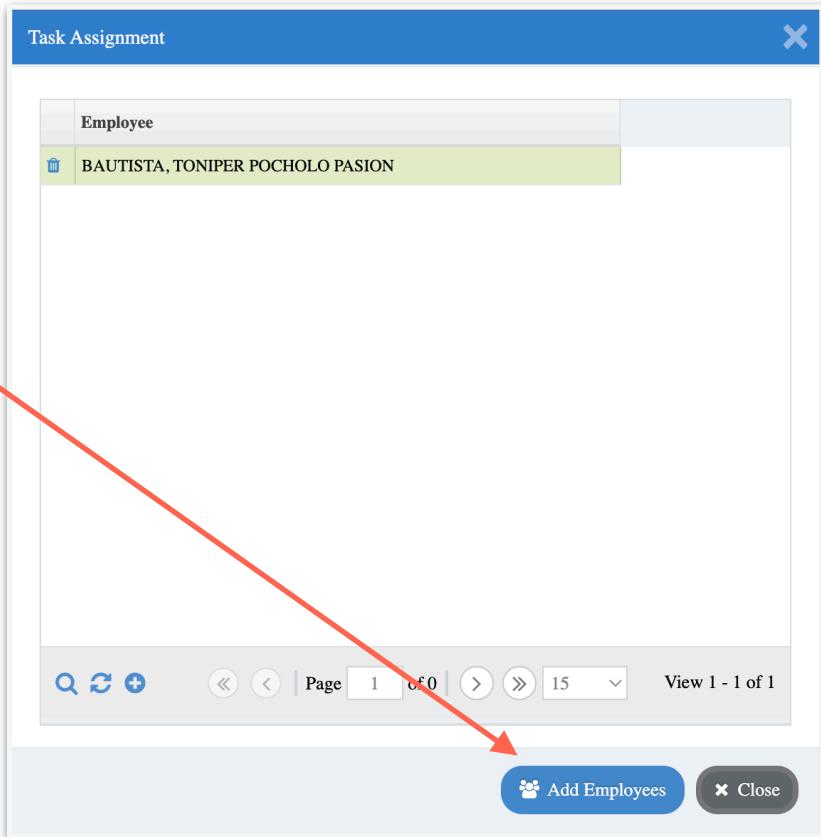
Select Employee

<input type="checkbox"/>	Employee No	Employee Name	Department	Branch
<input type="checkbox"/>	224	LEONORAS, CRONICA CERYL ABANTO	Finance	Pasig Head Office
<input type="checkbox"/>	416	BAÑADA, ALTA ALEGRE	Finance	Pasig Head Office
<input checked="" type="checkbox"/>	727	BAUTISTA, TONIPER POCHOLO PASION	Information Technology	Pasig Head Office
<input type="checkbox"/>	284	BAZAR, SHARA MAE CERDA	Finance	Pasig Head Office
<input type="checkbox"/>	424	BOO, RICARDO BENIGNOS	Finance	Pasig Head Office
<input type="checkbox"/>	108	CALIGUIRAN, MARIFE BARRIENTOS	Finance	Pasig Head Office
<input type="checkbox"/>	2284	CASARINO, JEMILLE ROSE JIMENEZ	Finance	Pasig Head Office
<input type="checkbox"/>	864	CASTILLO, JONATHAN QUIAMBAO	Information Technology	Pasig Head Office
<input type="checkbox"/>	26	Chua, Aileen Lee	Finance	Pasig Head Office
<input type="checkbox"/>	2140	CRUZ, MARIANE ALLOCOD	Finance	Pasig Head Office

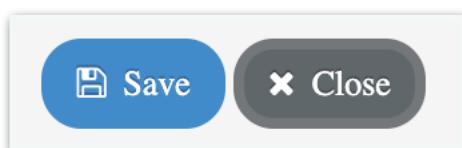
Page 1 of 4 | 15

Close

F. Click “Add Employees” Button.



G. Once tasks for this checklist are complete, click “Save”



Employee Onboarding

This is where you initiate a new onboarding checklist for a new employee, you can also check the progress of other onboarding employees here.

How to assign checklist to an onboarding employee?

1. On the left part, click Onboarding > Employee Onboarding

The screenshot shows the 'Employee Onboarding' section of the HRIS interface. A red arrow points from the 'Employee Onboarding' link in the navigation menu to the main content area. In the content area, there is a bar chart titled 'Manpower Complement' and two buttons at the bottom: 'Add Single Record' and 'Add by Batch'. Red arrows point from these buttons to their respective icons on the toolbar below.

Employee Onboarding List

	Employee No.	Employee	Hire Date	Start Date	End Date	Status	Progress
	3291	BEDUYA, MARY CLAIRE	10/07/2022	11/11/2022		Submitted	0 out of 1 tasks completed
	3291	BEDUYA, MARY CLAIRE	10/07/2022	11/11/2022		For Approval	0 out of 2 tasks completed

2 ways to add an Employee Onboarding



Add single record



Add by batch record



Add single record

A. Click the “...” button to select an employee.

The screenshot shows the 'Employee Onboarding' application interface. At the top, there are four buttons: 'Save' (blue), 'Submit' (light blue), 'Print' (orange), and 'Close' (grey). Below these is a section titled 'Employee Onboarding Information' with a dropdown menu. The 'Employee:' dropdown has a placeholder 'Please select' and a small '...' button to its right, which is highlighted by a red arrow. To the right of this, there are fields for 'Hire Date:' and 'Status:' (set to 'Draft'). Below this is a table with columns: Task, Name, Due Date, Status, Start Date, Date Accomplished, and Duration. At the bottom of the page are search and filter icons, and a navigation bar with page numbers (1 of 0) and a total count of 15.

B. Select an employee by clicking the (+) button on the left side of their name.

Select Employee				
	Employee No	Employee Name	Department	Branch
<input type="checkbox"/>	224	LEONORAS, CRONICA CERYL APANTO	Finance	Pasig Head Office
<input type="checkbox"/>	416	BAÑADA, ALTA ALEGRE	Finance	Pasig Head Office
<input type="checkbox"/>	727	BAUTISTA, TONIPER POCHOLO PASION	Information Technology	Pasig Head Office
<input checked="" type="checkbox"/>	284	BAZAR, SHARA MAE CERDA	Finance	Pasig Head Office
<input type="checkbox"/>	424	BOO, RICARDO BENIGNOS	Finance	Pasig Head Office
<input type="checkbox"/>	108	CALIGUIRAN, MARIFE BARRIENTOS	Finance	Pasig Head Office
<input type="checkbox"/>	2284	CASARINO, JEMILLE ROSE JIMENEZ	Finance	Pasig Head Office
<input type="checkbox"/>	864	CASTILLO, JONATHAN QUIAMBAO	Information Technology	Pasig Head Office
<input type="checkbox"/>	261	Chua, Aileen Lee	Finance	Pasig Head Office
<input type="checkbox"/>	2140	CRUZ, MARIANE ALLOCOD	Finance	Pasig Head Office

Page of 5 15 View 1 - 15 of 63

Close

Note: you can assign onboarding tasks only once in each employee, succeeding requests that is under onboarding category will be disregarded by the system.

C. Select a task checklist for this employee.

Employee Onboarding »

Save Submit Print Close

Employee Onboarding Information

Employee: BAZAR, SHARA MAE CERDA

Hire Date: 07/05/2012

Status: Draft

Task Checklist: Please select

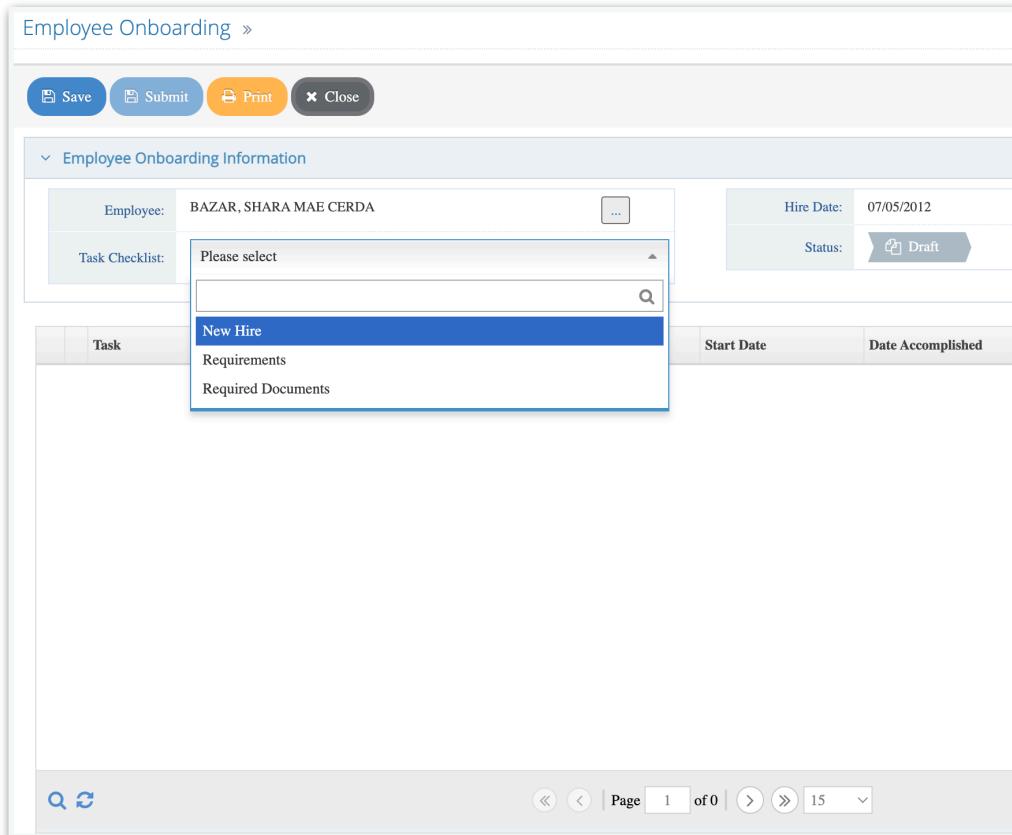
New Hire

Requirements

Required Documents

Start Date Date Accomplished

Page 1 of 0 15



D. The list of tasks inside the chosen checklist will appear here. Click “Save” then “Submit”.

Onboarding > Employee Onboarding

Employee Onboarding »

Save Submit Print Close

Employee Onboarding Information

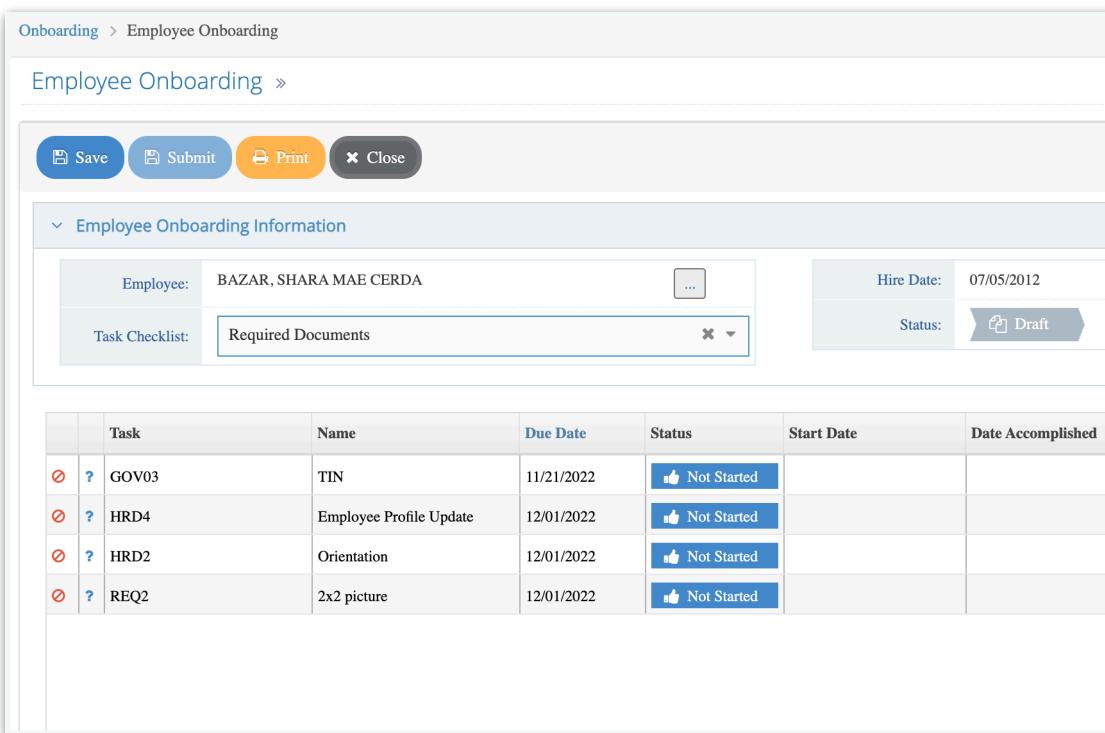
Employee: BAZAR, SHARA MAE CERDA

Hire Date: 07/05/2012

Status: Draft

Task Checklist: Required Documents

	Task	Name	Due Date	Status	Start Date	Date Accomplished
0	GOV03	TIN	11/21/2022	Not Started		
0	HRD4	Employee Profile Update	12/01/2022	Not Started		
0	HRD2	Orientation	12/01/2022	Not Started		
0	REQ2	2x2 picture	12/01/2022	Not Started		



E. Click “Close” to go back to the Employee Onboarding List. You will see that the status is for approval. The e@work will notify the assigned approver through their HR portal account.

Onboarding > Employee Onboarding List

Employee Onboarding List »

	Employee No.	Employee	Hire Date	Start Date	End Date	Status	Progress
	3291	BEDUYA, MARY CLAIRE	10/07/2022	11/16/2022		Approved	2 out of 2 tasks completed
	3291	BEDUYA, MARY CLAIRE	10/07/2022	11/11/2022		Approved	0 out of 1 tasks completed
	3291	BEDUYA, MARY CLAIRE	10/07/2022	11/16/2022		Approved	0 out of 1 tasks completed
	17	ORAYE, SHEILA B.	08/28/2006	11/16/2022		Approved	0 out of 2 tasks completed
	17	ORAYE, SHEILA B.	08/28/2006	11/16/2022		Approved	1 out of 1 tasks completed
	284	BAZAR, SHARA MAE C.	07/05/2012	11/16/2022		For Approval	0 out of 4 tasks completed

Status:

Submitted - click the submit button on the inside of the checklist.

For Approval - the approver should now approve the request, the system will notify them.

Approved - the employee in charge can now start to do the tasks

« « | Page 1 of 1 | » » 15 ▾

How to approve a task checklist

- If you are an approver, go to Onboarding > Employee Onboarding
- Click on employee
- On the right side, you can click whether you Approve / Cancel / Disapprove

The screenshot shows the 'Employee Onboarding' section of the software. A blue callout box at the top right says 'Once submitted, the request will now be for approval'. Below it, three buttons are shown: 'Approve' (blue), 'Cancel' (grey), and 'Disapprove' (red). Another blue callout box on the right lists the functions of these buttons: 'Approval buttons are now available: Approve - to approve the checklist, Cancel - to cancel the checklist, Disapprove - to disapprove the checklist'. The main table displays several tasks for hiree Moreno, Sofia, with columns for Task, Name, Due Date, Status, and Start Date.

Task	Name	Due Date	Status	Start Date
Gather new hire paper works		08/26/2018	Not Started	
Nametags	Prepare nametags		Not Started	
Desk Setup	Desk Setup		Not Started	
Software/Hardware for new hire			Not Started	
Phone and voicemail set up			Not Started	
Email added to employee directory			Not Started	

Start the task of the employee using account as an HR:

- Click the "Edit" button to go to the tasks that is to be started.

The screenshot shows the 'Employee Onboarding List' page. A red arrow points to the edit icon (pencil) in the first row of the table. The table lists employees with their hire dates, start dates, statuses, and progress. The last column shows the status as 'For Approval' for the last two rows.

Employee No.	Employee	Hire Date	Start Date	End Date	Status	Progress
3291	BEDUYA, MARY CLAIRE	10/07/2022	11/16/2022		Approved	12 out of 2 tasks completed
3291	BEDUYA, MARY CLAIRE	10/07/2022	11/11/2022		Approved	0 out of 1 tasks completed
3291	BEDUYA, MARY CLAIRE	10/07/2022	11/16/2022		Approved	0 out of 1 tasks completed
17	ORAYE, SHEILA B.	08/28/2006	11/16/2022		Approved	0 out of 2 tasks completed
17	ORAYE, SHEILA B.	08/28/2006	11/16/2022		Approved	1 out of 1 tasks completed
284	BAZAR, SHARA MAE C.	07/05/2012	11/16/2022		For Approval	0 out of 4 tasks completed

B. Click the “Play” button to start the task.

The screenshot shows the Employee Onboarding Information page. At the top, there are four buttons: Save, Submit, Print (highlighted in orange), and Close. Below the buttons, the Employee section displays "Employee: BEDUYA, MARY CLAIRE" and "Task Checklist: test". To the right, the Hire Date is listed as "10/07/2022" and the Status is "Approved". A table below shows a single task entry: "Task: GOV04, Name: PAGIBIG No., Due Date: 12/01/2022, Status: Not Started".

C. This will prompt and will let you select a date of when does the employee should accomplish this task, then click the “Yes” button to proceed.

The screenshot shows the Employee Onboarding Information page with a modal dialog titled "Message". The message asks, "Do you want to start this task?". Two buttons are available: "Yes" (highlighted in blue) and "No". A calendar for December 2022 is displayed, showing the days from 27 to 31. The day "1" is highlighted in blue, indicating it is the selected or default date. The main table below the modal shows the task "GOV04" with the name "PAGIBIG No." and due date "12/01/2022".

D. The status will now be updated into started.

Onboarding > Employee Onboarding

Employee Onboarding »

Save Submit Print Close

Employee Onboarding Information

Employee:	BEDUYA, MARY CLAIRE	Hire Date:	10/07/2022
Task Checklist:	test	Status:	Approved

	Task	Name	Due Date	Status	Start Date	Date Accomplished	Duration	
▶	GOV04	PAGIBIG No.	12/01/2022	Started	11/17/2022 9:19 AM			11/17/2022 9:19 AM

Mark Task as Completed as an HR

If the employee has completed the task and status is not yet updated, you have a choice to update it on your end as an HR.

A. Click the “Forward” button to mark the task as Completed.

Onboarding > Employee Onboarding

Employee Onboarding »

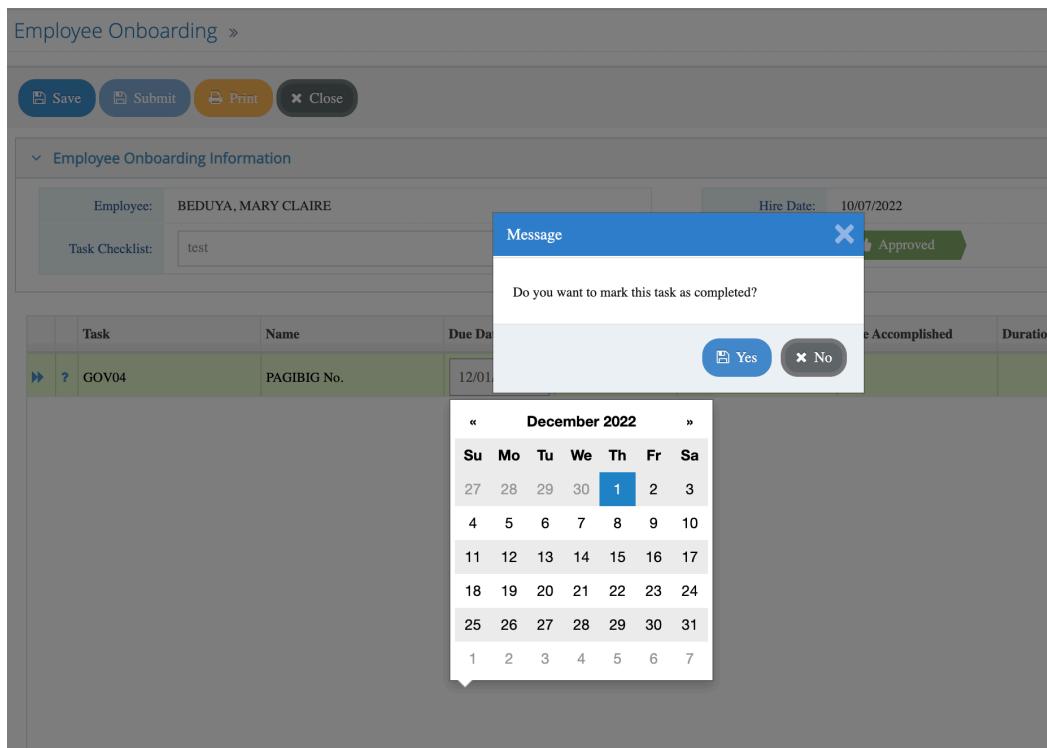
Save Submit Print Close

Employee Onboarding Information

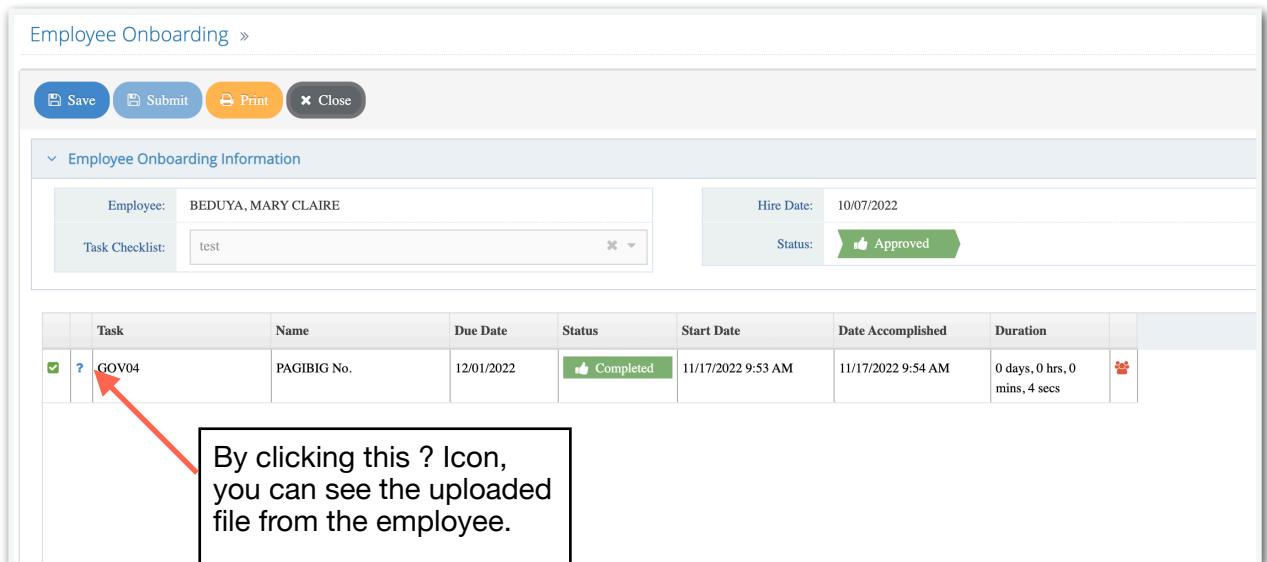
Employee:	BEDUYA, MARY CLAIRE	Hire Date:	10/07/2022
Task Checklist:	test	Status:	Approved

	Task	Name	Due Date	Status	Start Date	Date Accomplished	Duration	
▶	GOV04	PAGIBIG No.	12/01/2022	Started	11/17/2022 9:19 AM			11/17/2022 9:19 AM

B. Choose date when does the employee accomplished the task and then click “Yes” button.



C. The status will now be updated as completed as well as the date accomplished and the duration how long the task is done.



Start the task of the employee on Employee Portal:

The employee can also start his/her own task once approved, they can also see a notification that there is a task assigned to them.

- A. Go to the tasks, click the task button.

The screenshot shows the 'everything at work' Employee Portal dashboard. At the top right, there is a notification bar with a red arrow pointing to it from the text above. The notification bar displays three items:

- No new notification(s)
- You have an onboarding task for ORAYE, SHEILA BARTOLOME (about 19 hours ago)
- Your Onboarding has been Approved (about 21 hours ago)
- Your Onboarding has been Approved (a day ago)

Below the notification bar is a 'Schedule for (11/17/2022)' section. It includes a clock icon, a 'No Schedule Regular' message, and a 'View Calendar' button. To the right of this is a 'Memorandum and Announcement' section with a 'No items on Whiteboard' message and a 'No survey available' message with a red circle icon.

The main dashboard area features several data cards:

- Yesterday**: No Schedule. Shows 0 Total Tardiness (MTD) and 0 Total Absences (MTD).
- Tomorrow**: No Schedule. Shows 0 Total Tardiness (YTD) and 0 Total Absences (YTD).
- Nov 1 - Nov 17**: Shows 0 Total Tardiness (MTD) and 0 Total Absences (MTD).
- Jan 1 - Nov 17**: Shows 0 Total Tardiness (YTD) and 0 Total Absences (YTD).

- B. Tasks assigned to you will be listed like this. In this case, this tasks are completed. If a task has not yet been completed, you will see a paper clip icon on the right side for attaching a file, and a play button to start the task.

The screenshot shows the 'Tasks' page of the Employee Portal. A red arrow points to the first task in the list, which is completed. The tasks listed are:

- + FA-NH - Fixed Asset Requests for New Hires Onboarding
Due Date: 03/05/2025 Date Started: 04/16/2025 (Completed)
- + HRDS - Office Tour (SEPT11, MELVIN) Onboarding
Due Date: 04/15/2025 Date Started: Not yet started
- + TECH2 - Access IDs (SEPT11, MELVIN) Onboarding
Due Date: 04/15/2025 Date Started: Not yet started
- + Desk Setup (APRIL14TEST, APRIL14) Onboarding
Due Date: 04/21/2025 Date Started: Not yet started
- + Desk Setup (30TEST, JAN30) Onboarding
Due Date: 04/21/2025 Date Started: Not yet started
- + Desk Setup (TEST, SEPT 25) Onboarding
Due Date: 04/21/2025 Date Started: Not yet started

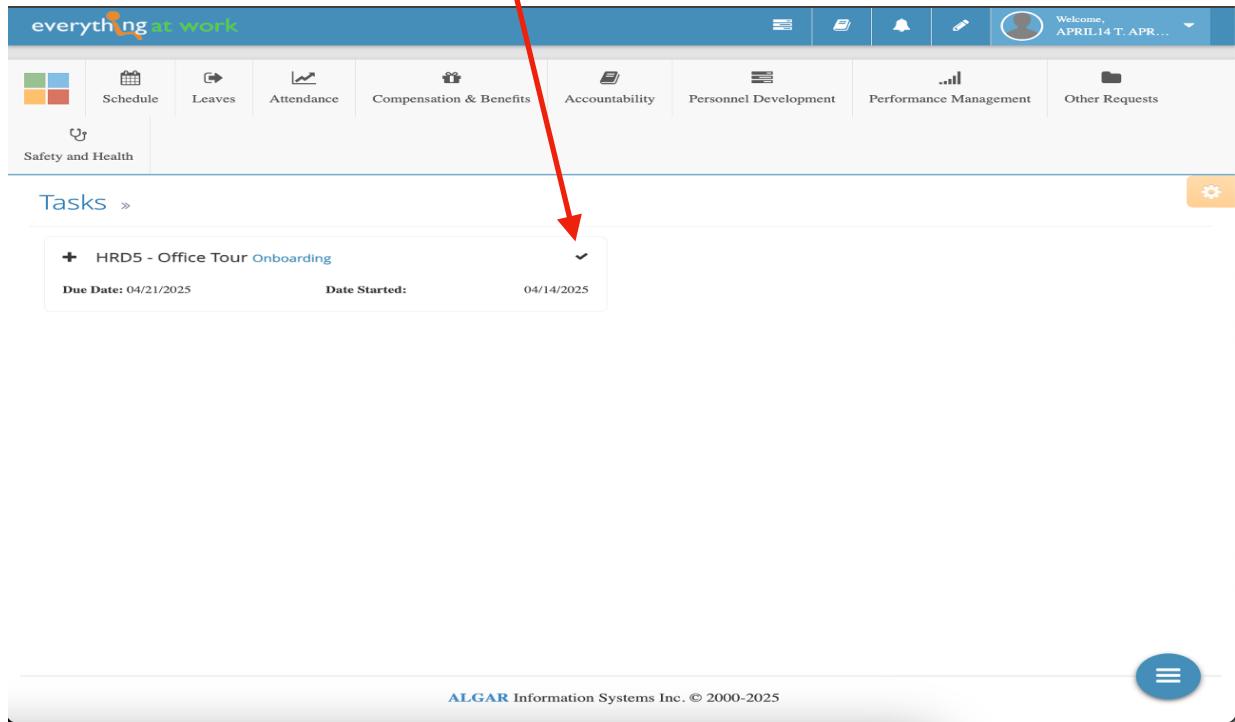
C. If a task has not yet been completed, you will see a paper clip icon on the right side for attaching a file, and a play button to start the task.

The screenshot shows the 'Tasks' section of the HRIS Onboarding system. A task titled 'HRD5 - Office Tour (SEPT11, MELVIN) Onboarding' is listed. The task details are: Due Date: 04/15/2025, Date Started: Not yet started. To the right of the task details is a red box containing a paperclip icon and a blue play button. A red arrow points from the text 'If a task has not yet been completed, you will see a paper clip icon on the right side for attaching a file, and a play button to start the task.' to this red box.

D. Once it is started, the play button will be changed into a check button.

The screenshot shows the same 'Tasks' section after the task has been started. The task 'HRD5 - Office Tour (SEPT11, MELVIN) Onboarding' now has a checkmark icon instead of a play button. A large red arrow points from the text 'Once it is started, the play button will be changed into a check button.' to the checkmark icon.

E. After finishing your task, press this button to mark it complete. The system will remove it from your active tasks while maintaining a record that HR can access through their portal view.



Employee onboarding:

1. Set a checklist for employee
2. Submit a request
3. The assigned approver should approve the onboarding
4. Once approved, the system will notify the employee that the onboarding request is approved and the tasks will appear on the task list.
5. The employee /hr can now click the start button.
6. Attach file (if applicable, usually for the onboarding employee itself ex. E1 SSS form, Philhealth ID, Pag big etc.)
7. Once done, click the check icon on the right side of the task. (Or you may edit task setup where the HR should check the uploaded documents first before the employee can update it as completed.)
8. The status completed will then appear on HR portal, you can view the employee's uploaded file by clicking the ? (Question mark button)