# HR - HRIS > ONBOARDING

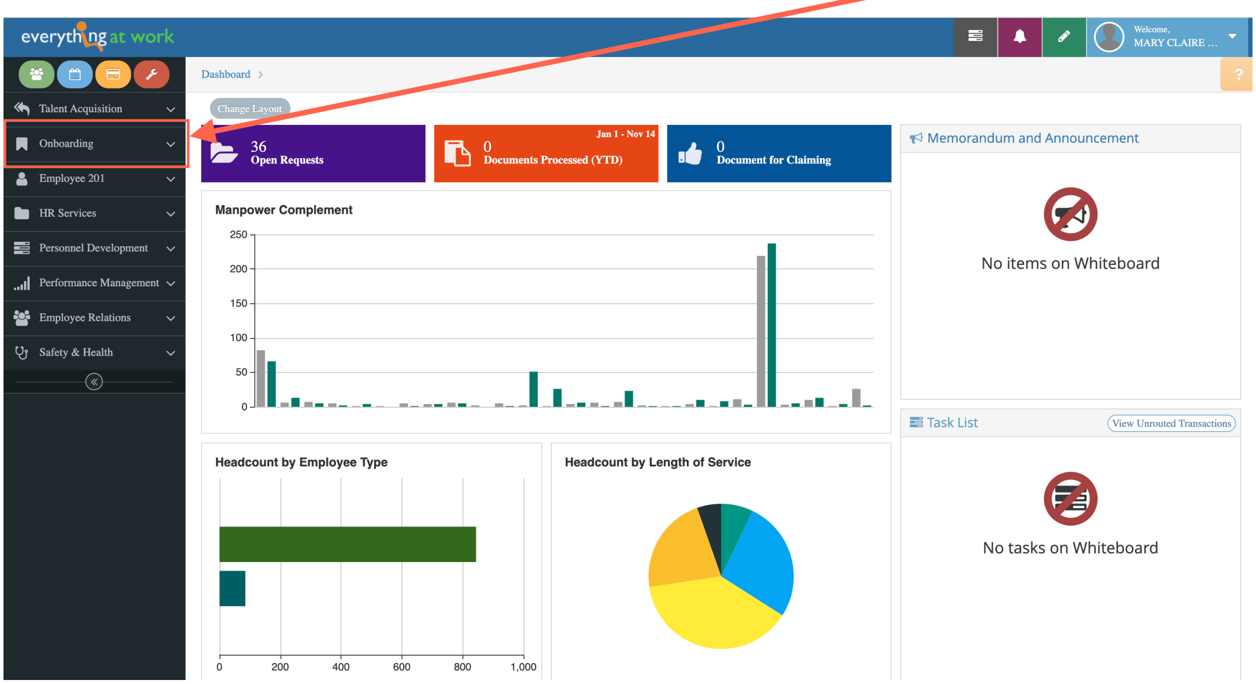
Setup employee's onboarding requirements as well as the checklist of things the company needs to prepare when the new employee arrives.

## Where can I find this module?

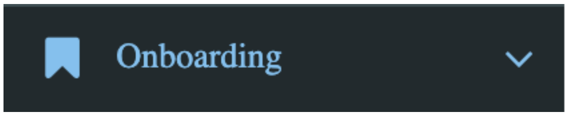

- **SIGN IN**

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

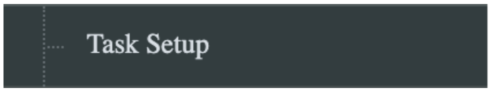
4. On the left side of the HRIS Dashboard, click the **Onboarding module.**



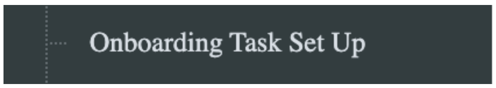
## There are 3 sub modules under Onboarding:



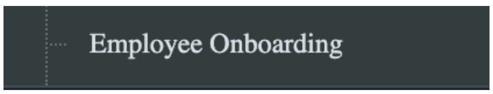

Setup employee’s onboarding requirements as well as the checklist of things the company needs to prepare when the new employee arrives.



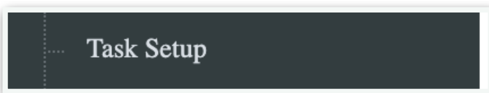

Define the tasks that can be part of the onboarding checklist




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



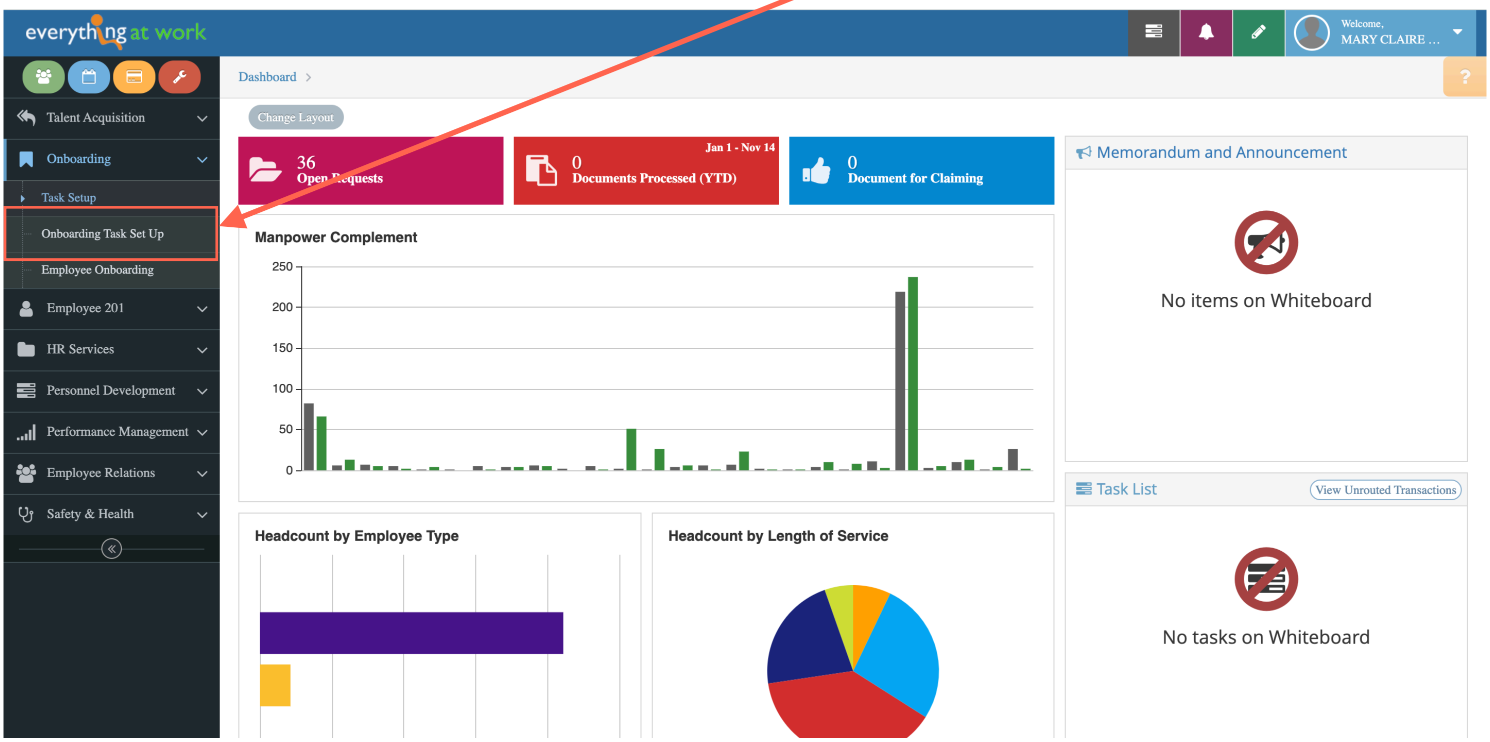

This is where you initiate a new onboarding checklist for a new employee, you can also check the progress of other onboarding employees.

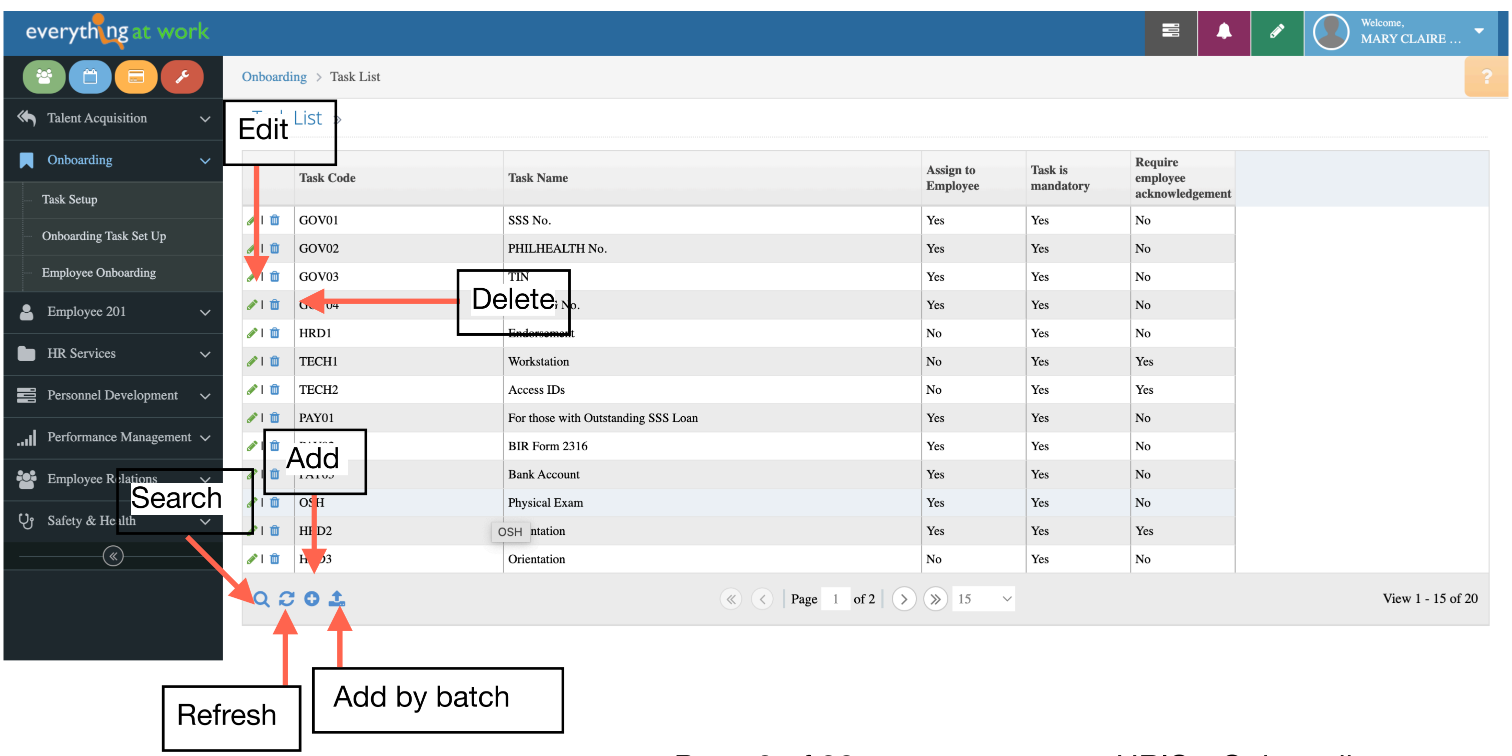



Define the tasks that can be part of the onboarding checklist.

# How to add a Task?

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



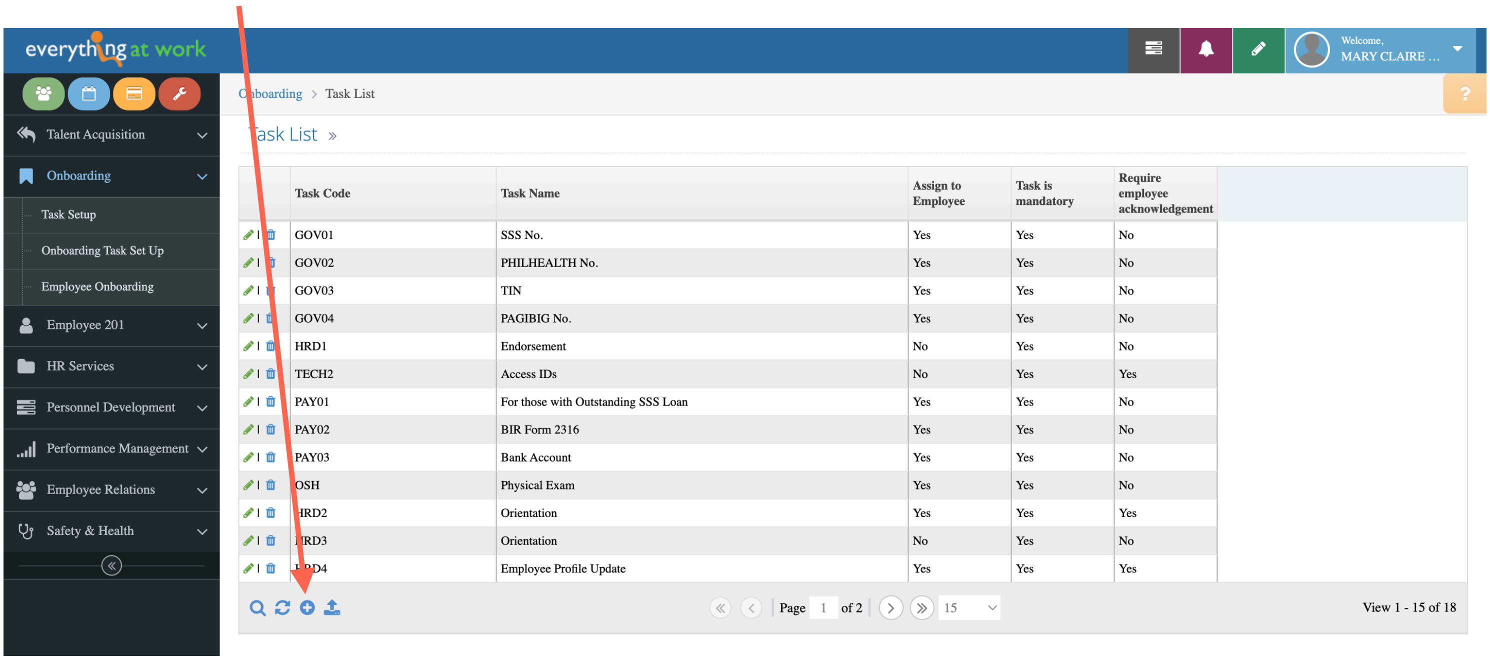
# 2 Ways Adding a Task

Add single record

Add by batch

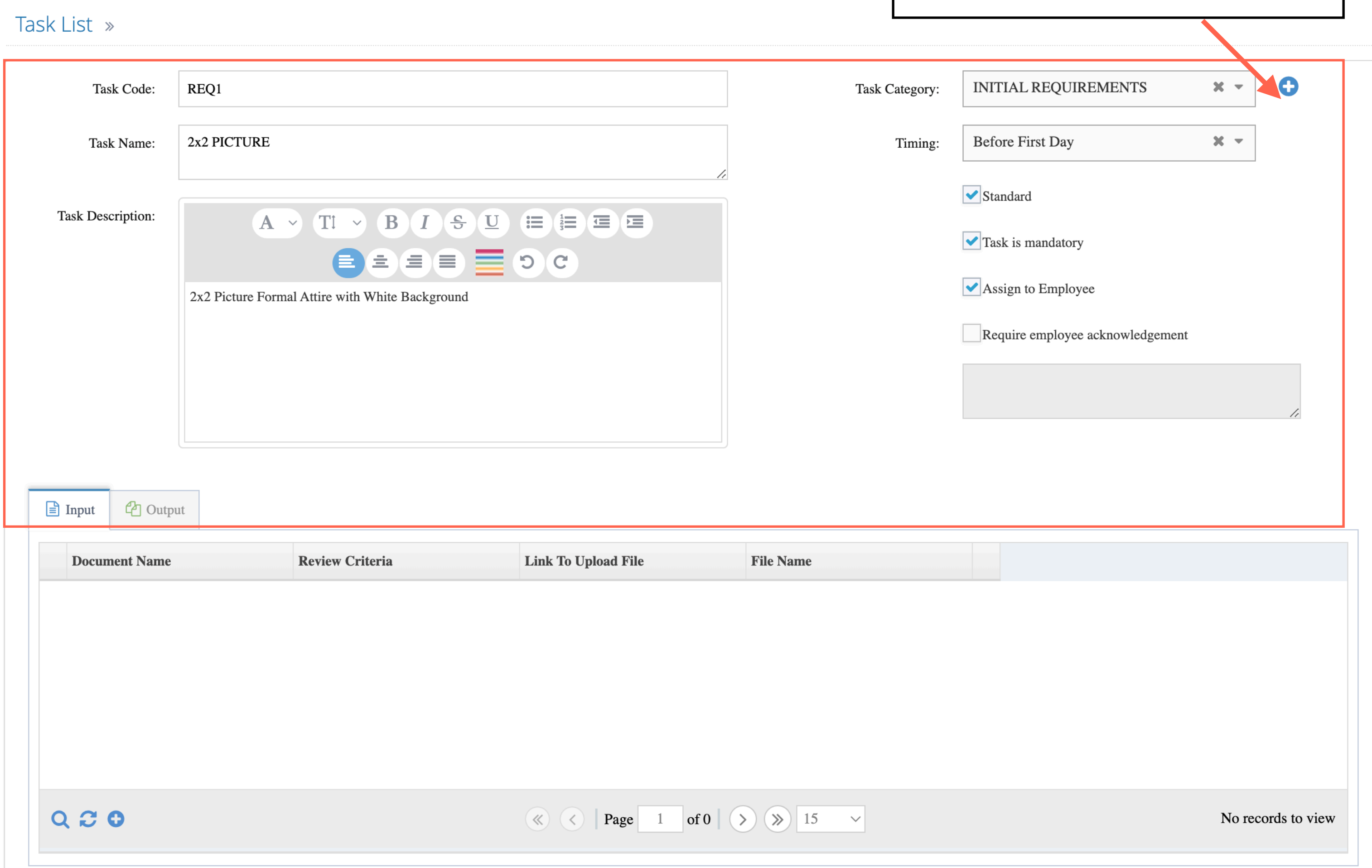
## Add single record

A. Click “Add” button

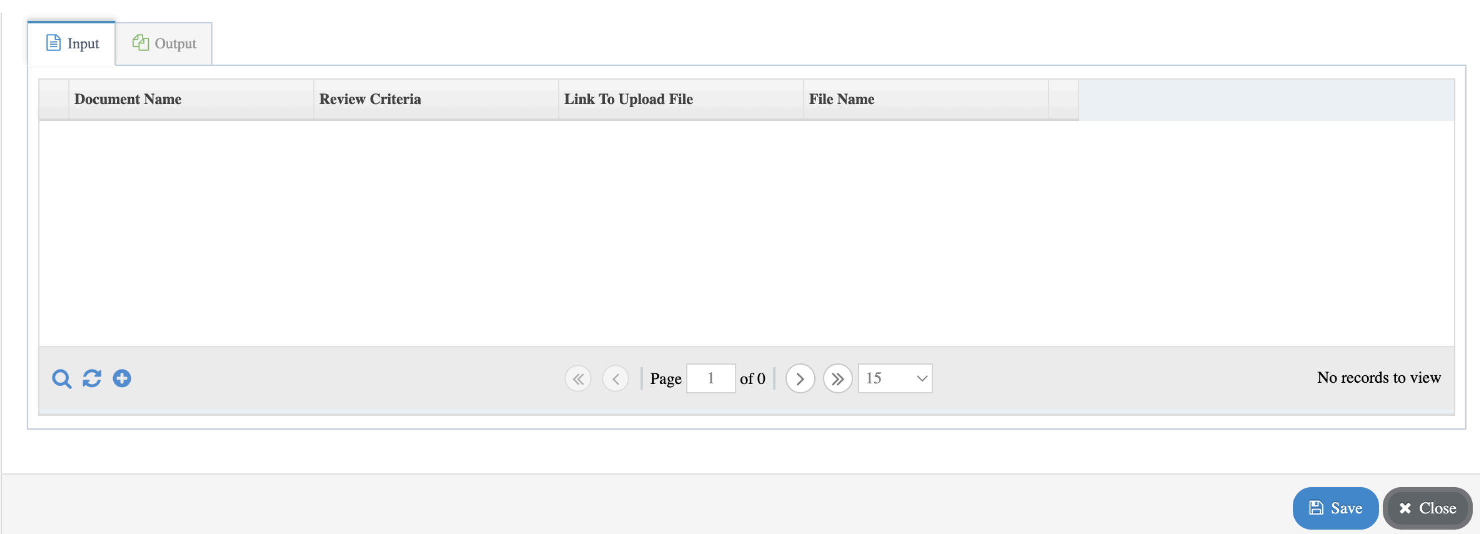


B. Fill up the fields.

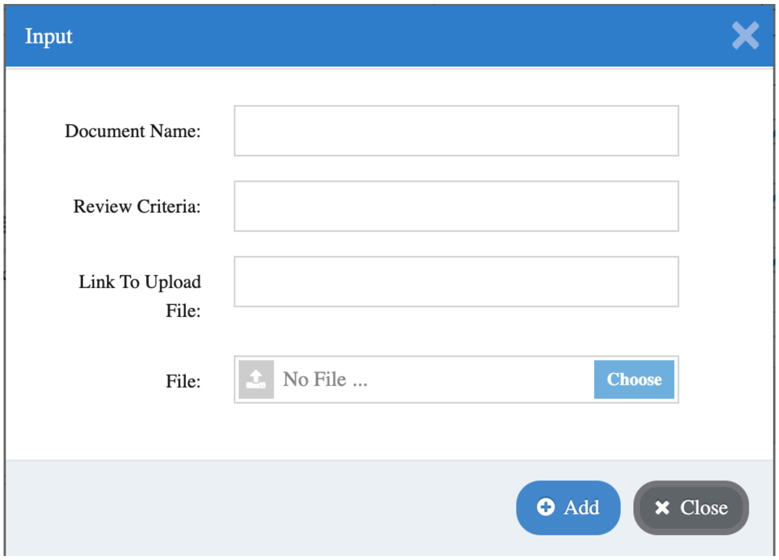
You may add other categories here



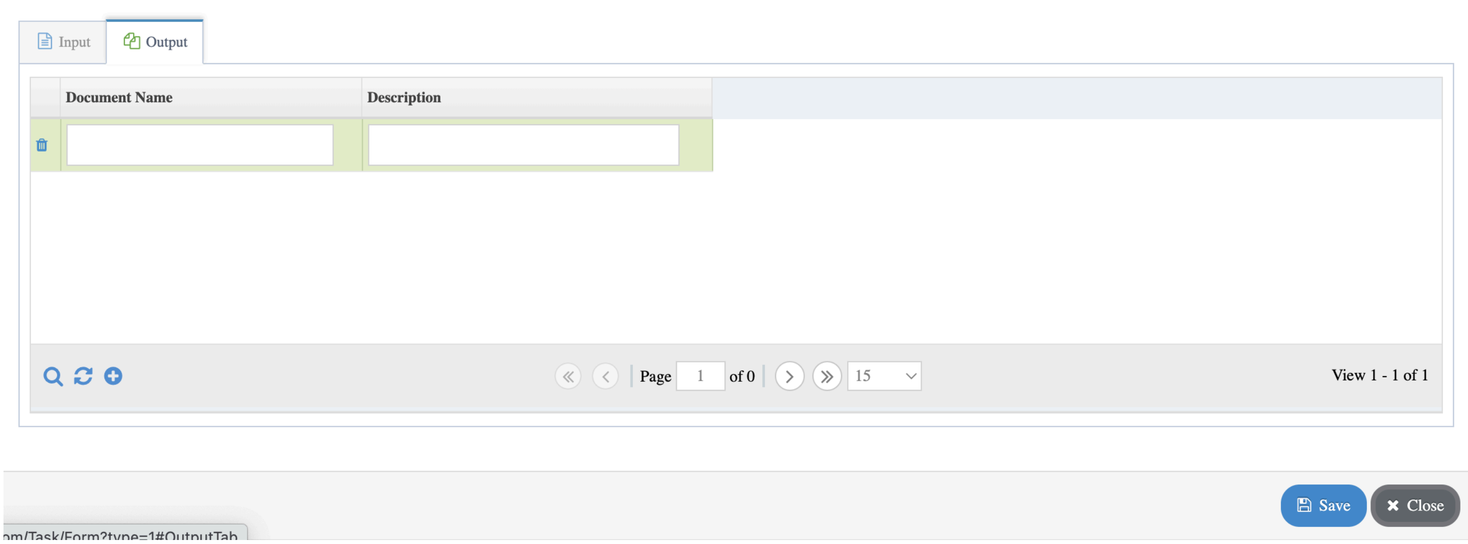

C. On the bottom part, upload an input if there's any. (Documents to be uploaded like form, instructions, etc.), click "Add" under Input tab.



D. Fill up fields and choose file to be attached.
E. Click “Add” button.




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.

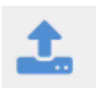


## This will now appear on the Task List.

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 |

TECH2

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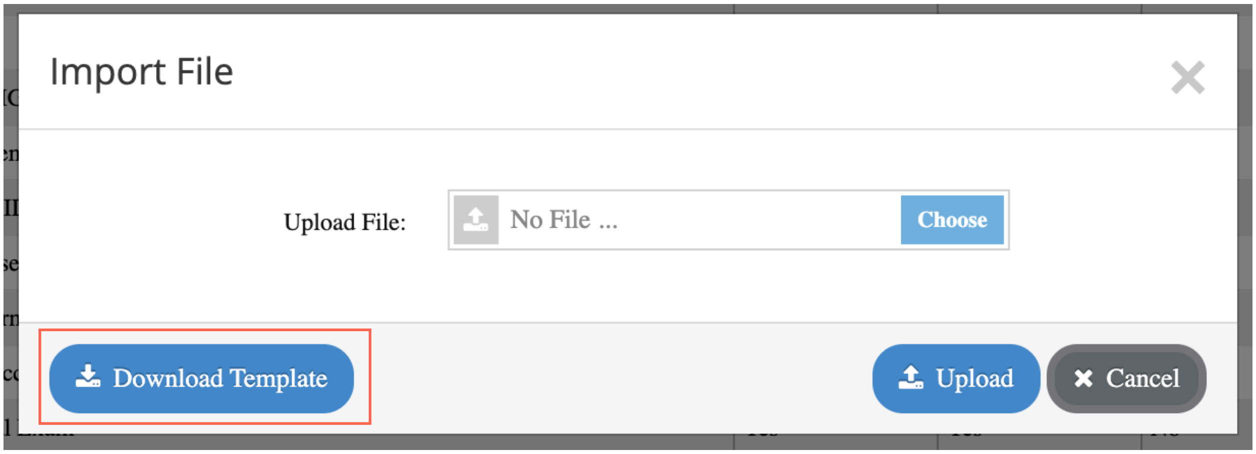
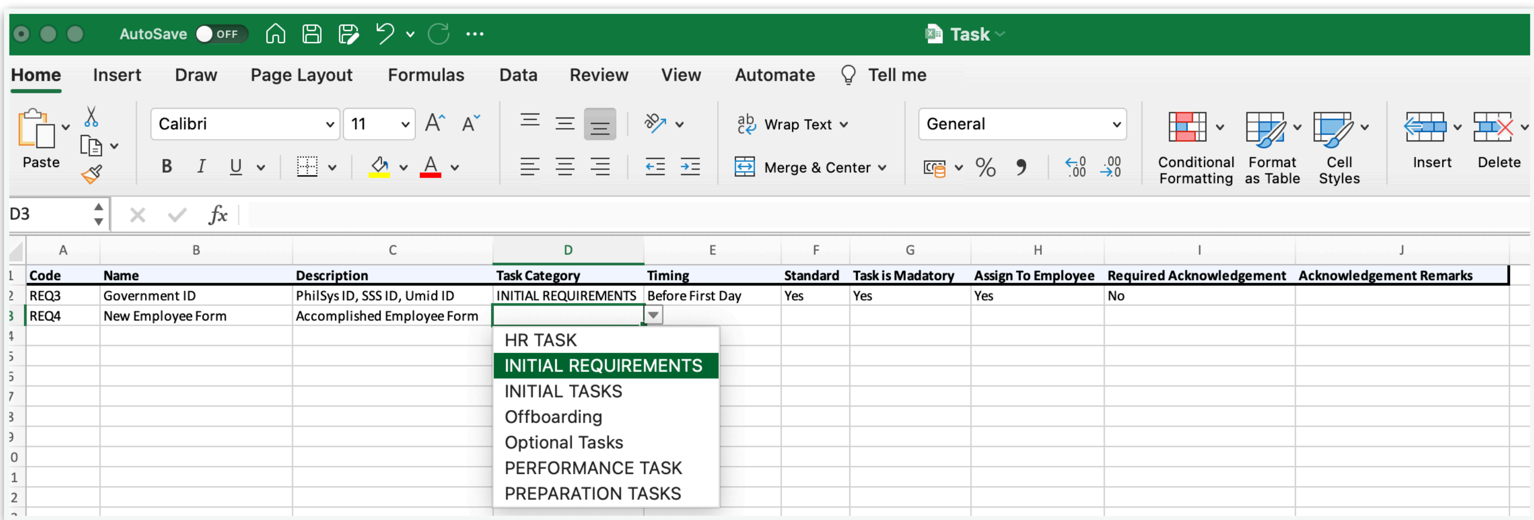
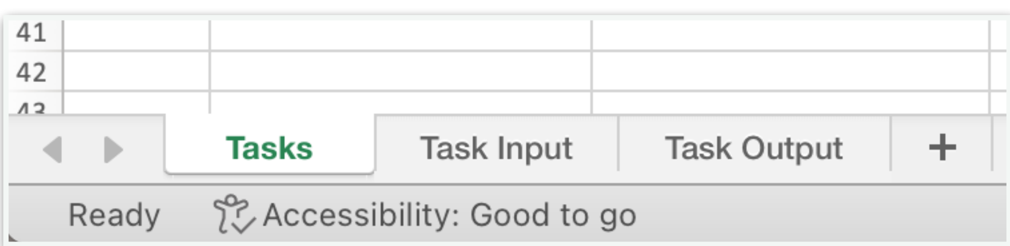
B. Click “Download Template” button to get the template file.




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.)

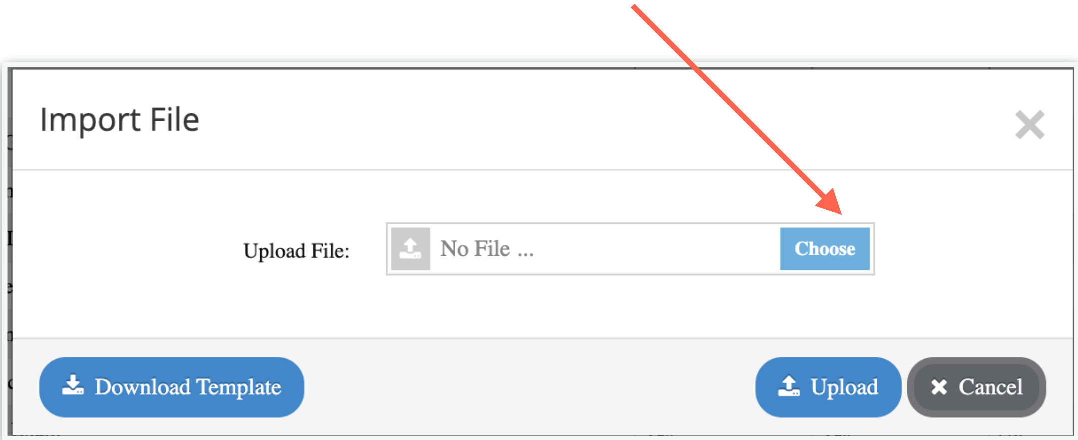



Please take note that there are 3 sheets within this spreadsheet. Fill out the task Input and Output if there is any.

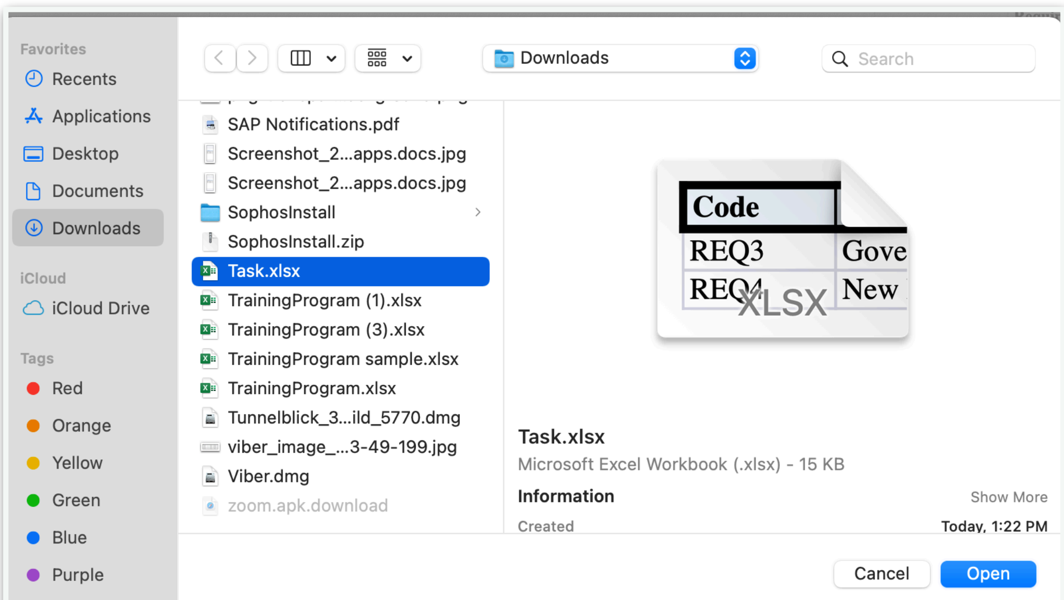



D. Save the file.

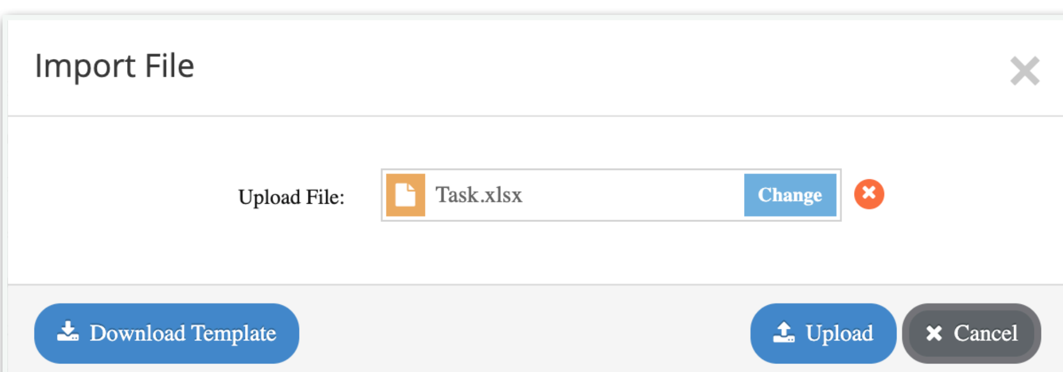
E. Back to the HRIS System, click the “Choose” icon to upload the file.



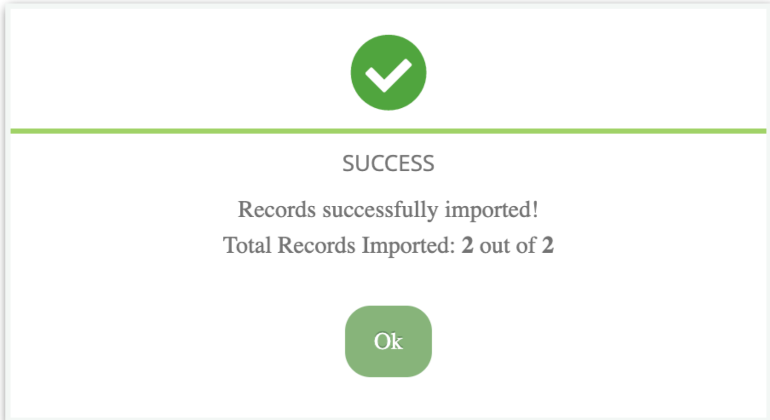

F. Choose the file and click “Open”



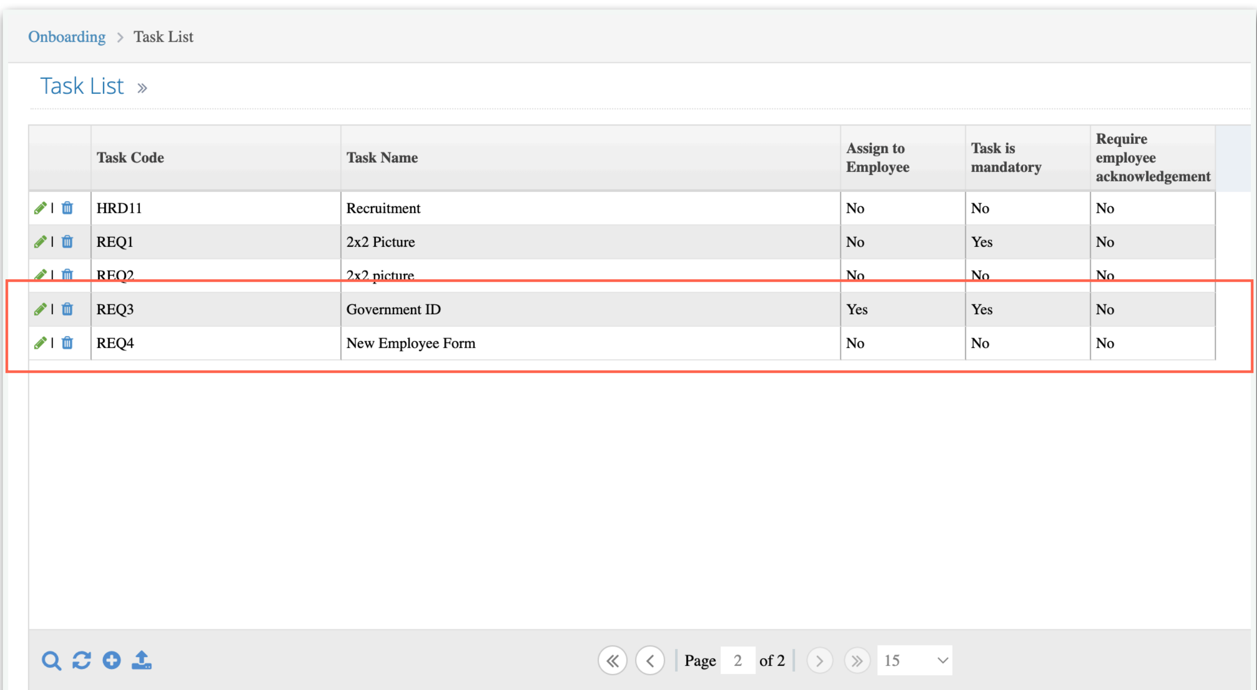

G. Click the “Upload” button.



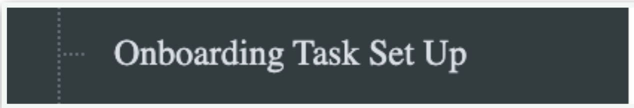
This will show once adding is a success.




Newly added task will now appear here.

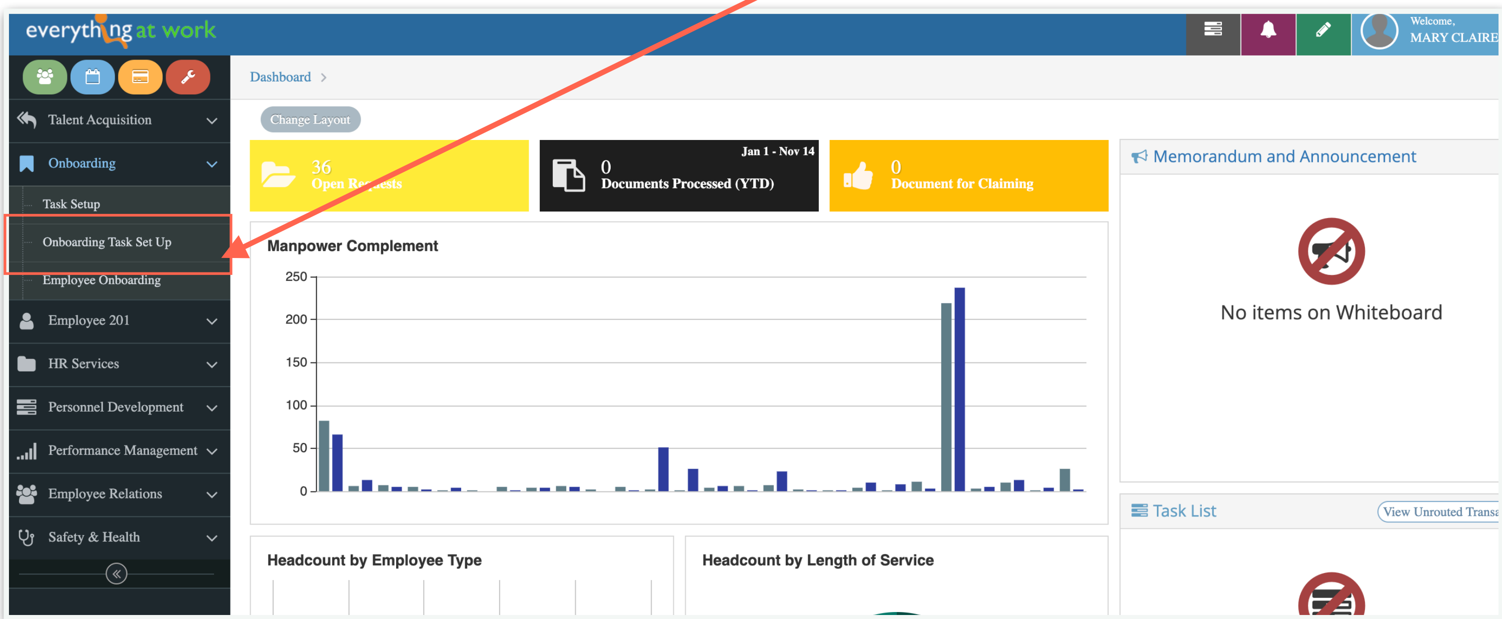



| | Task Code | Task Name | Assign to Employee | Task is mandatory | Require employee acknowledgement |
|---|---|---|---|---|---|
| | HRD11 | Recruitment | No | No | No |
| | REQ1 | 2x2 Picture | No | Yes | No |
| | REQ2 | 2x2 picture | No | No | No |
| | REQ3 | Government ID | Yes | Yes | No |
| | REQ4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

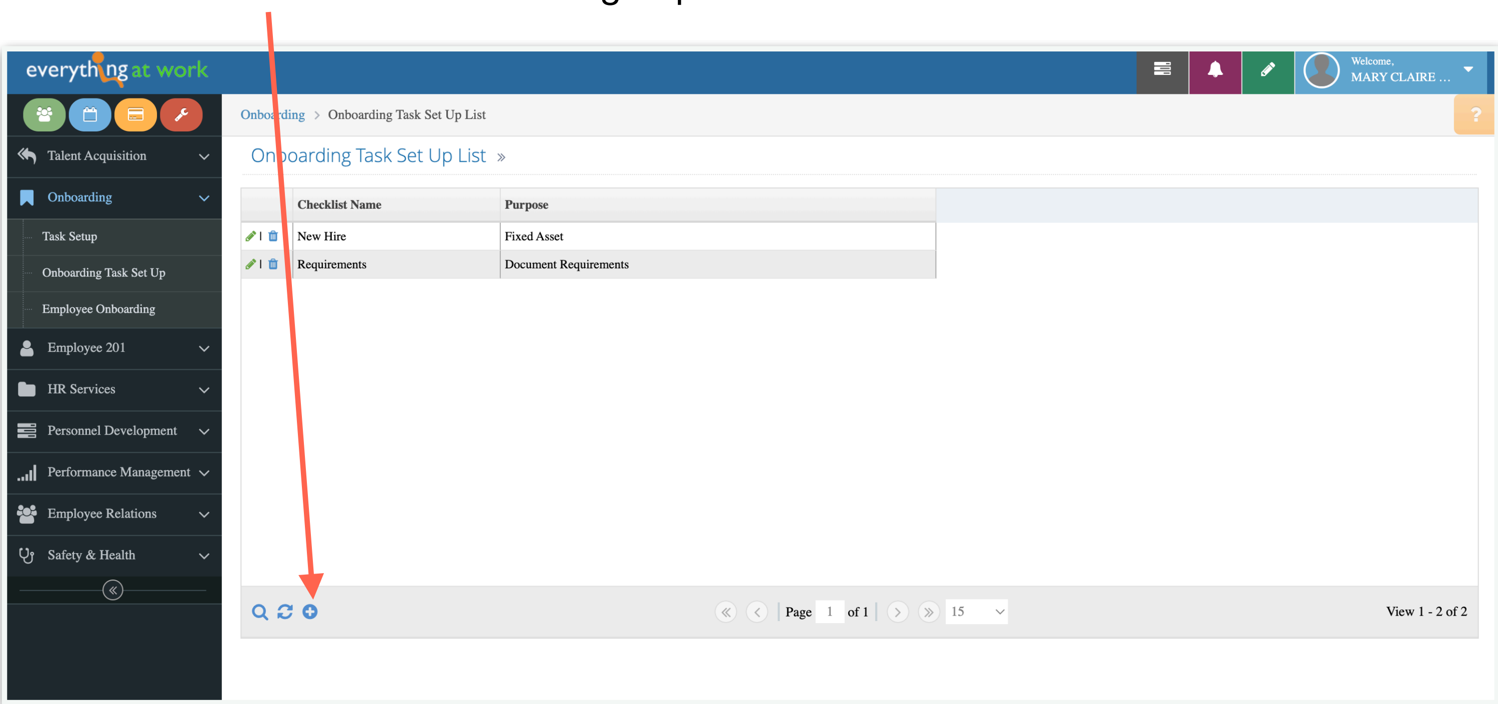



This is where you can classify the tasks into group to be the employee's checklist.

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

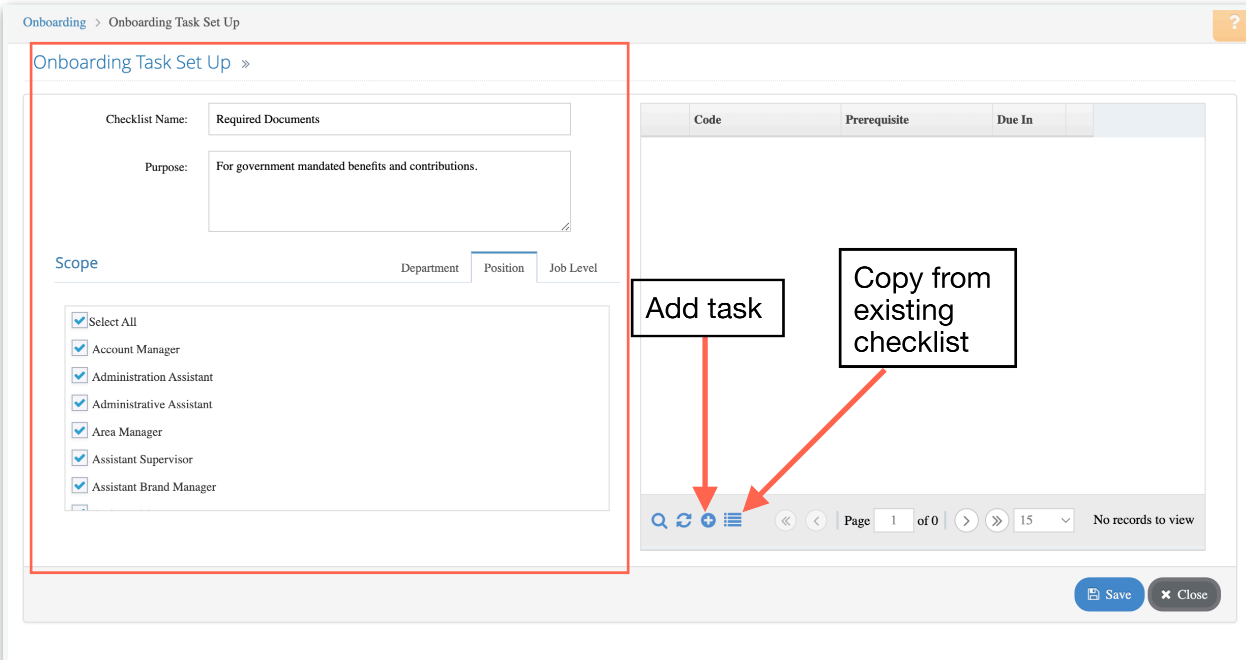



2. Click the "Add" button to create group of tasks / Checklist.



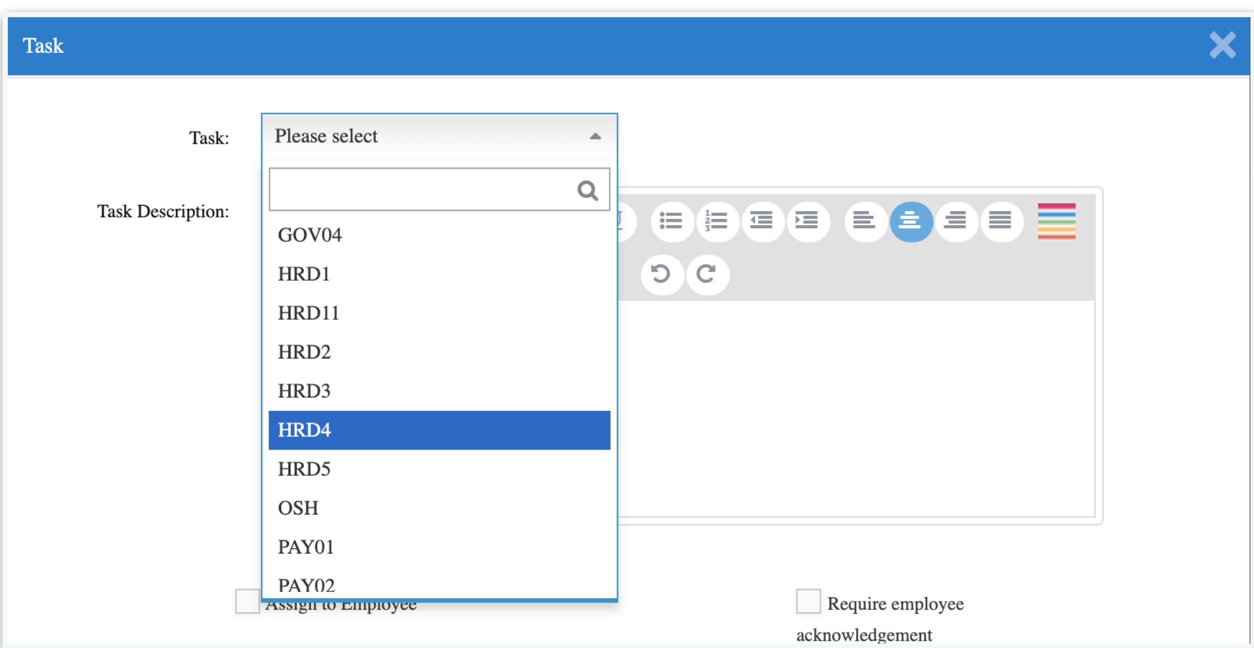
3. Fill out the left side and choose the scope for this checklist (you may choose it per Department / per Position / PER Job Level).

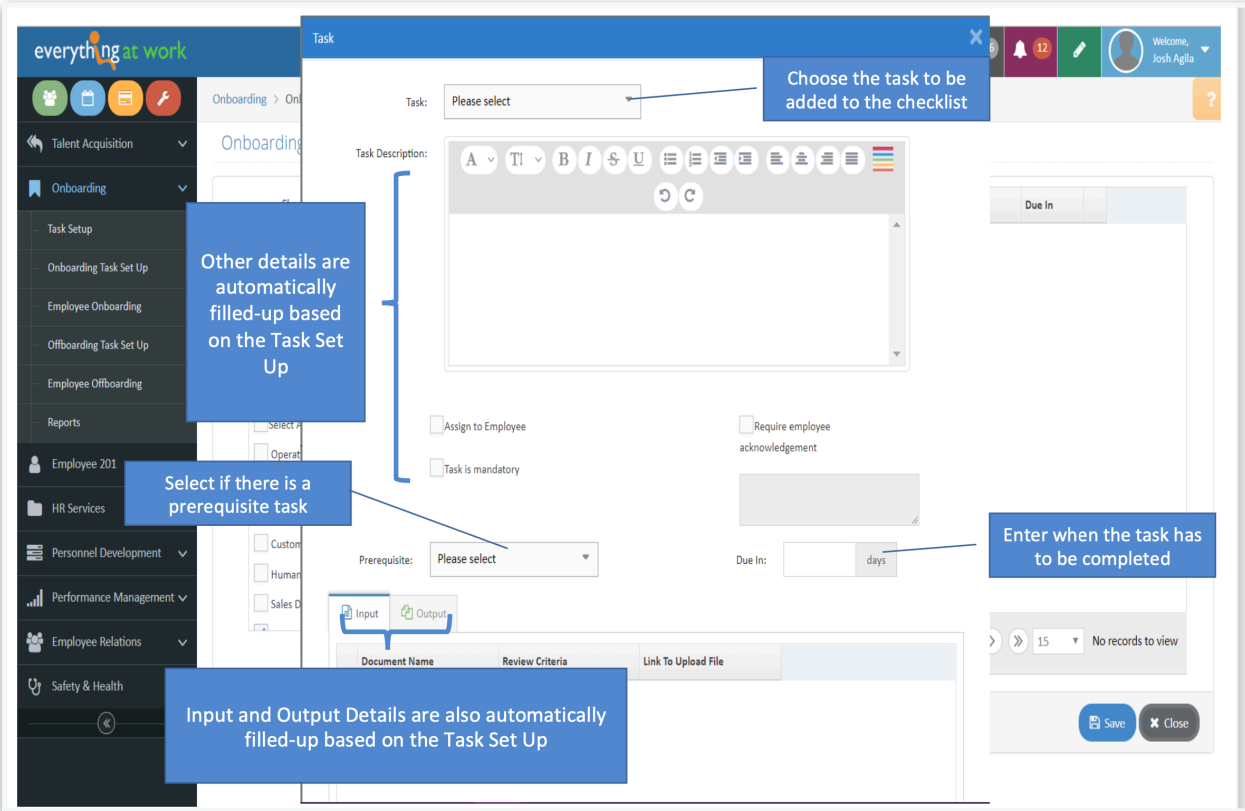
4. Add tasks to the checklist, click (+) to add new task. Or you may copy tasks form other existing checklist by clicking the List button.



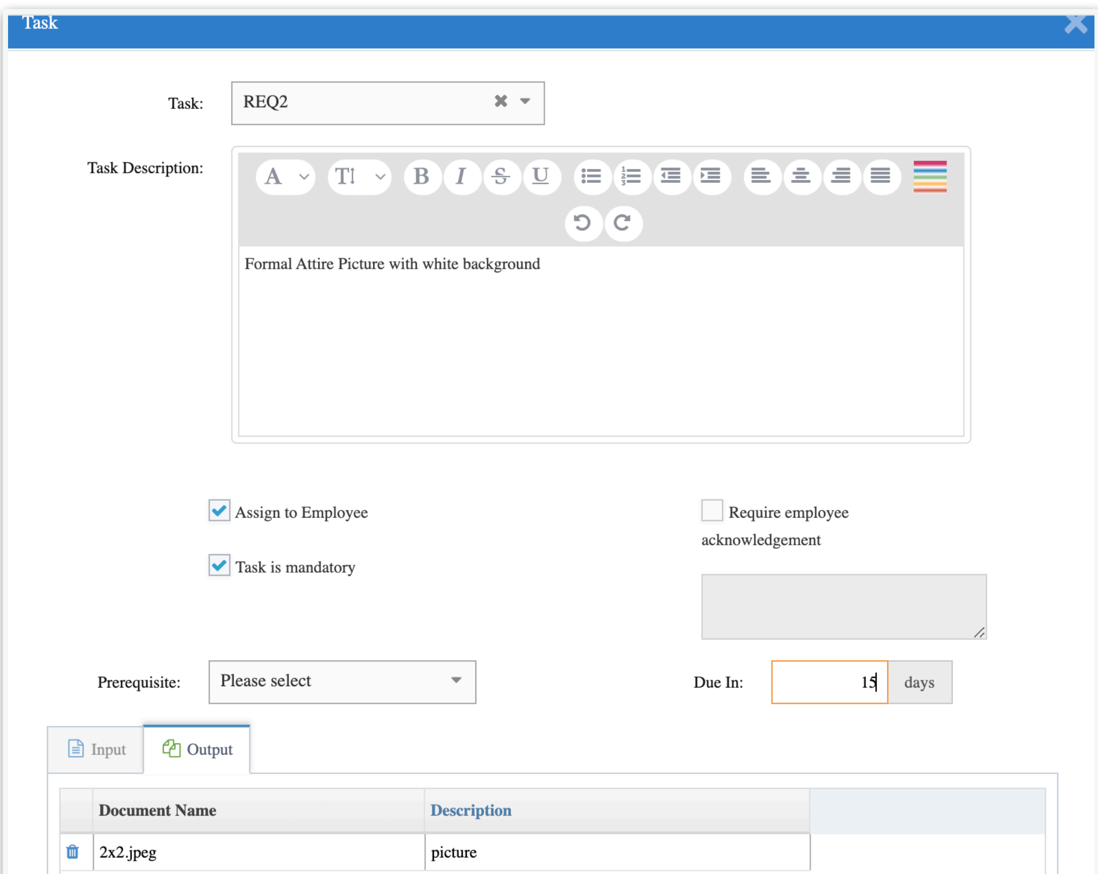

## ADD BUTTON

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

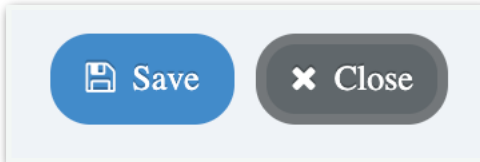



Task
Choose the task to be added to the checklist
Other details are automatically filled-up based on the Task Set Up
Select if there is a prerequisite task
Enter when the task has to be completed
Input and Output Details are also automatically filled-up based on the Task Set Up
Task:
Please select
Task Description:
Assign to Employee
Task is mandatory
Require employee acknowledgement
Prerequisite:
Due In:
days
Input
Output
Document Name
Review Criteria
Link To Upload File
Save
Close

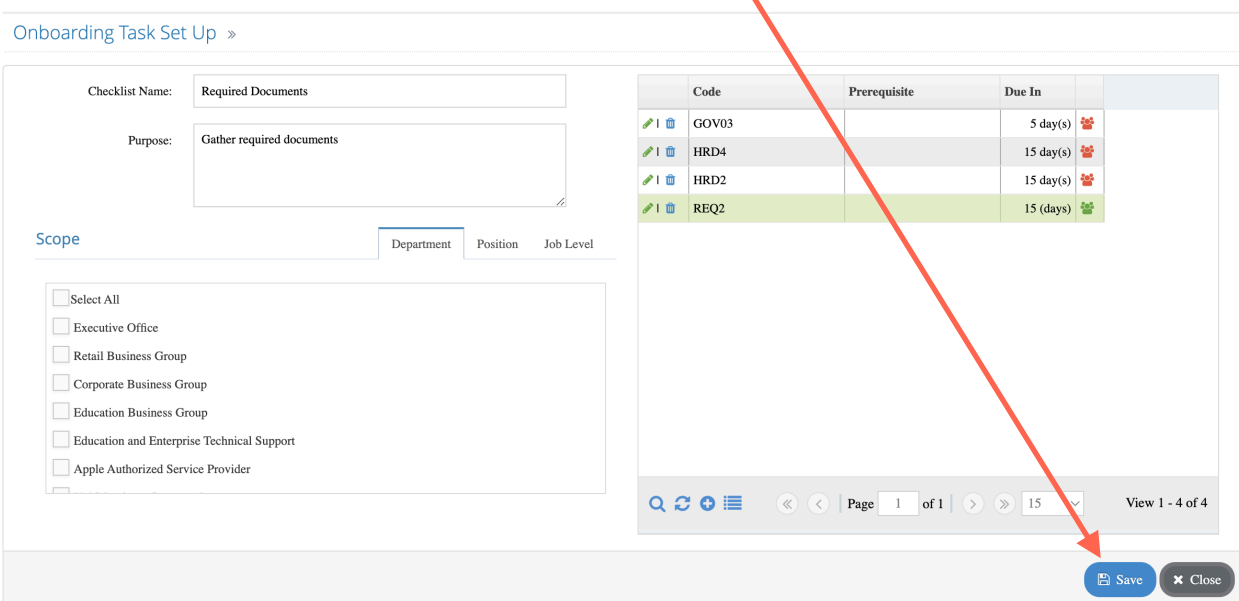
Sample:


Task
Task:
REQ2
Task Description:
Formal Attire Picture with white background
Assign to Employee
Task is mandatory
Require employee acknowledgement
Prerequisite:
Please select
Due In:
15
days
Input
Output
Document Name
Description
2x2.jpeg
picture

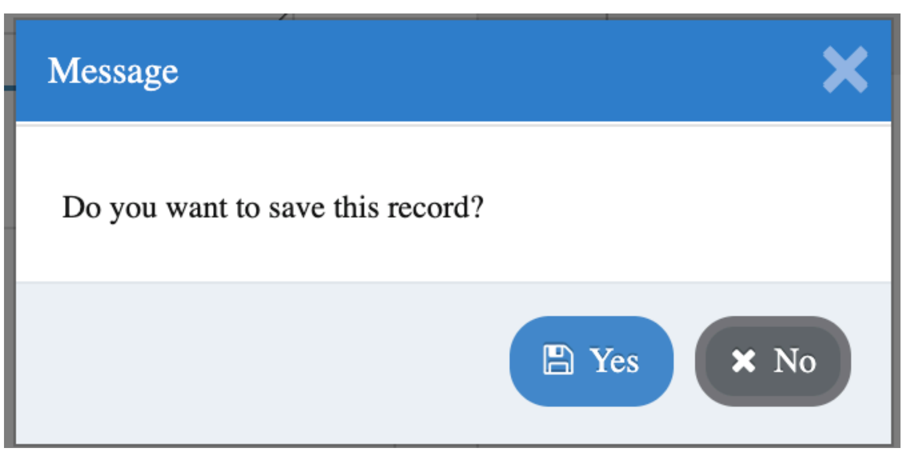
B. Once done, click “Save” on the right bottom part.



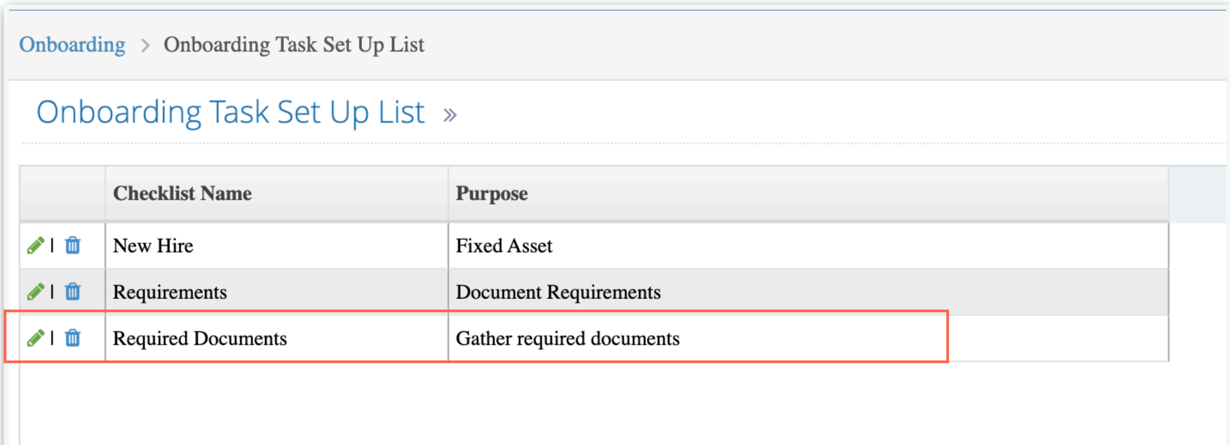

C. Add until you complete the tasks needed.
D. Once completed, you may now click “Save”.




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

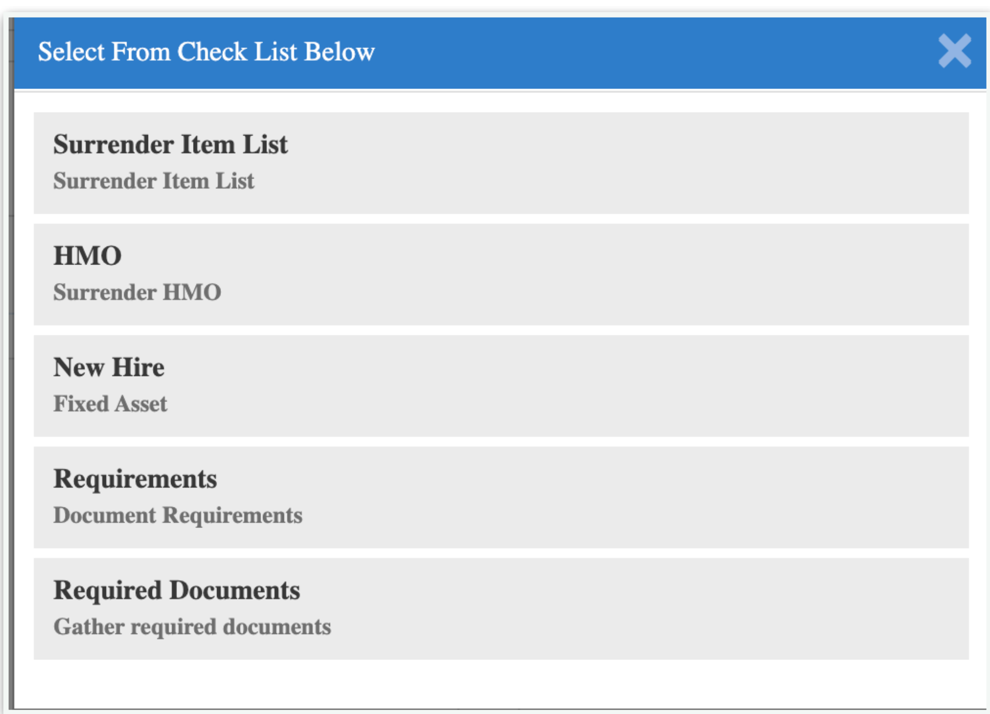


This should now appear on the list.

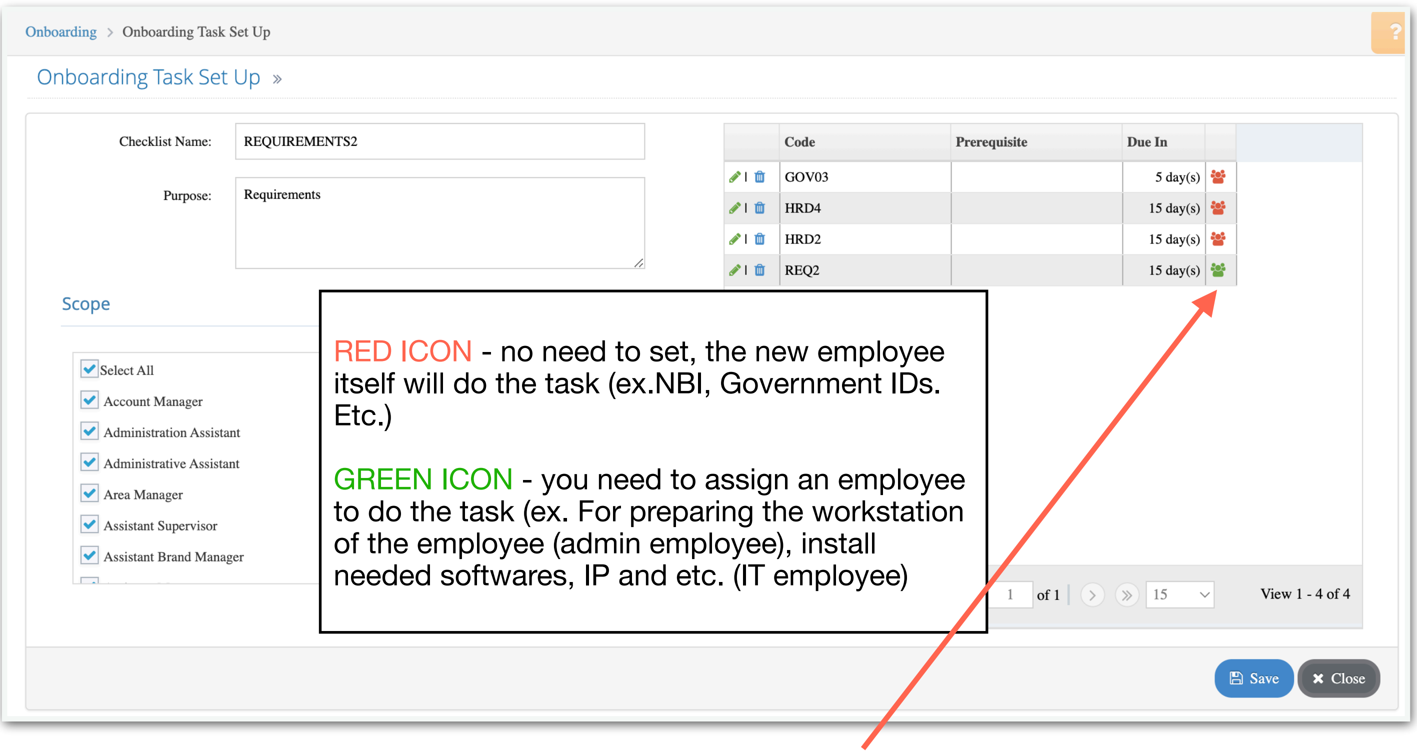



## COPY FROM EXISTING CHECKLIST

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

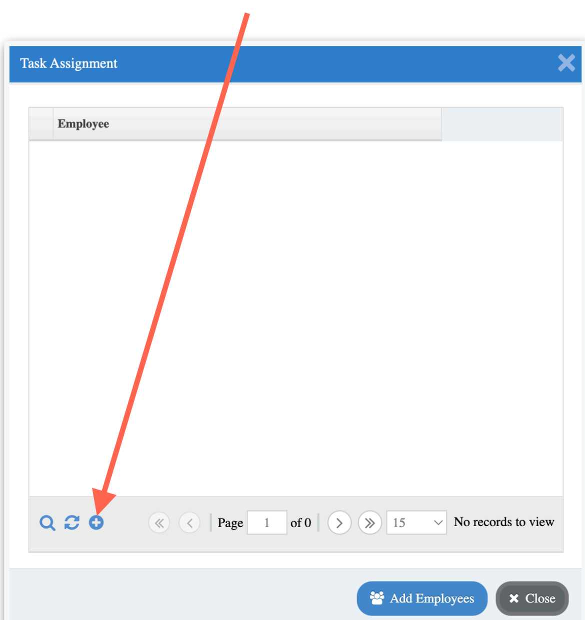


B. The tasks inside the chosen checklist will now be added here.
You can add more task by clicking (+) button

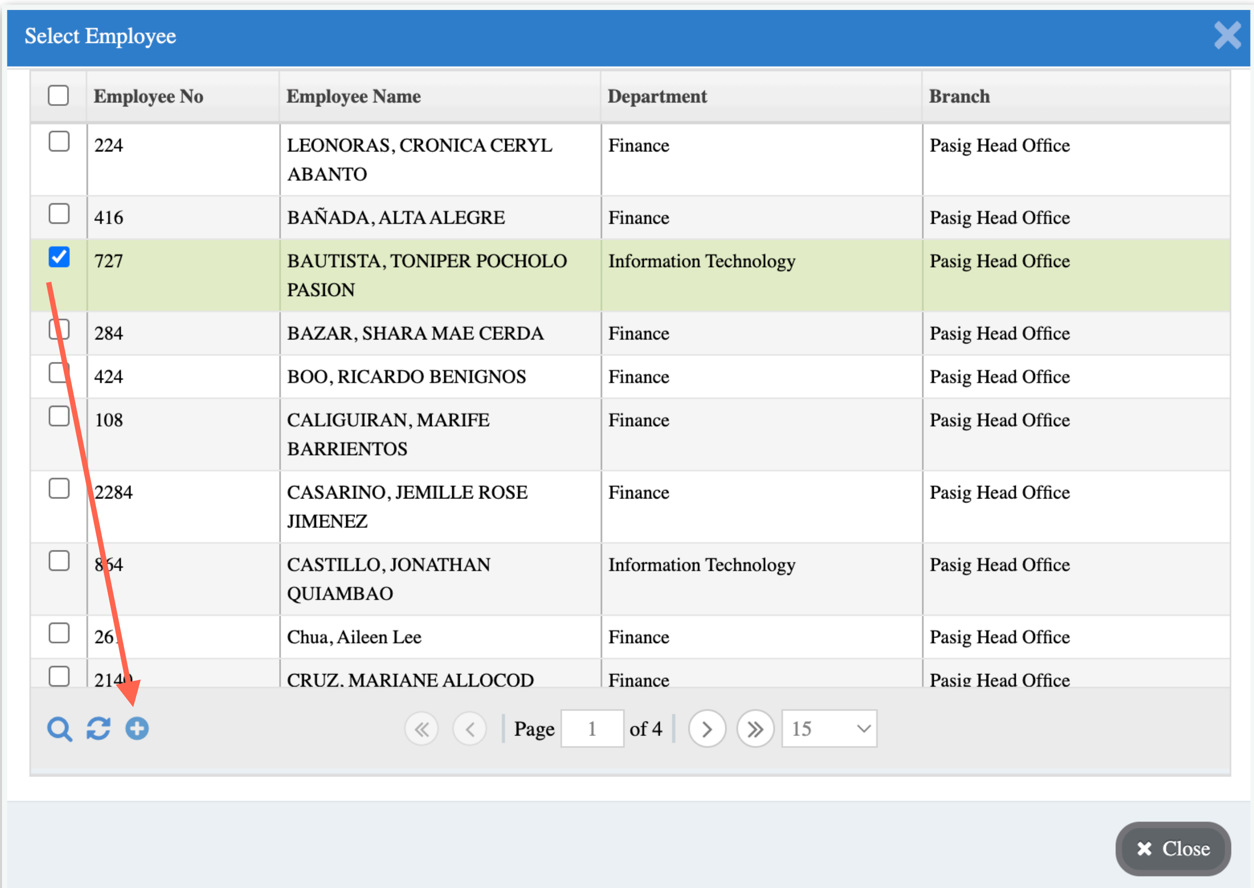



C. Click on with color green icon to assign an employee for this task.

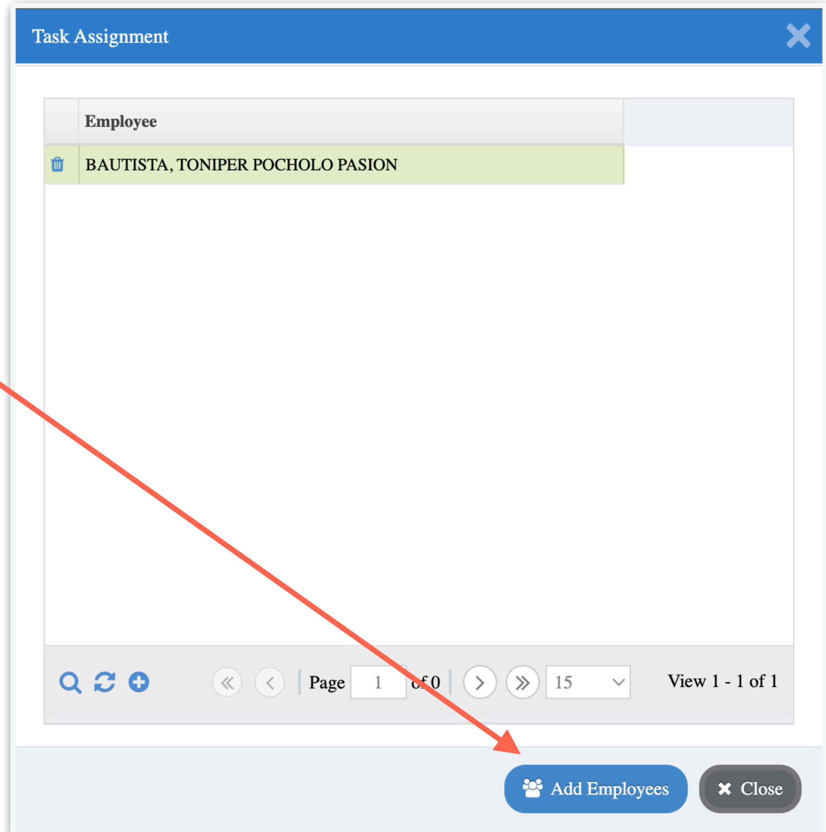
D. Click (+) button to add an employee assigned to check this task.



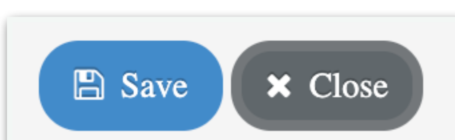
E. Tick checkbox of the assigned employee and then click the (+) button to add.

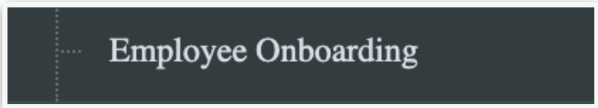


F. Click “Add Employees” Button.




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

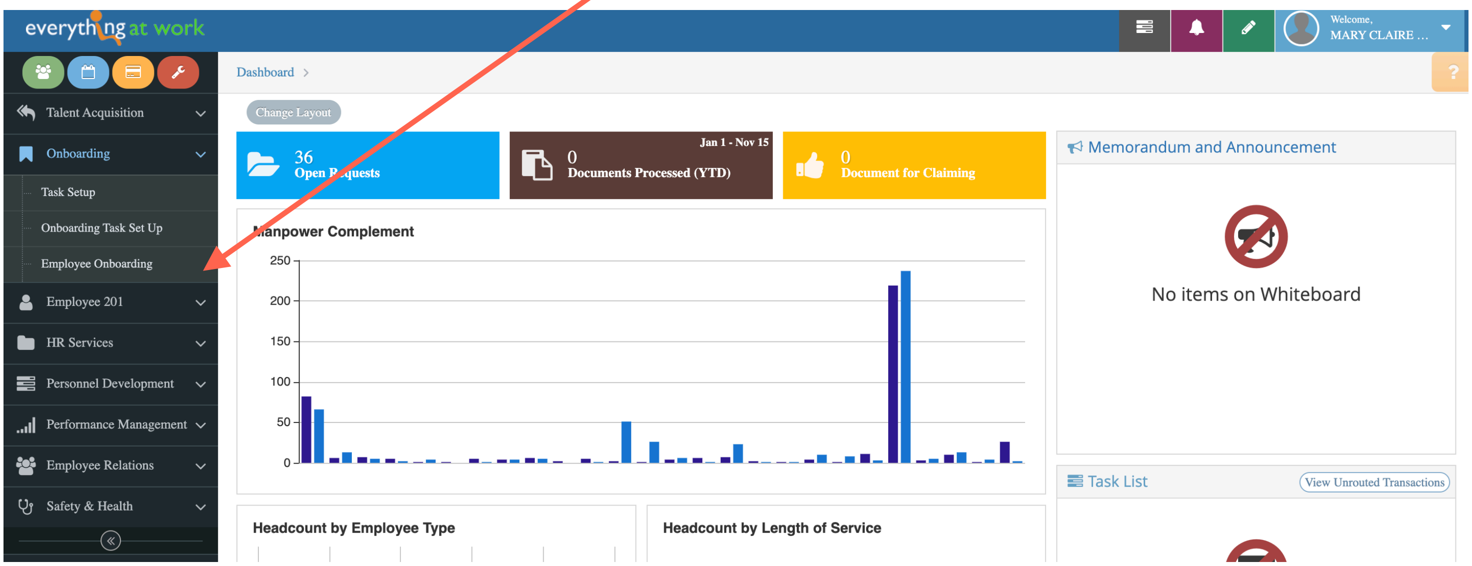


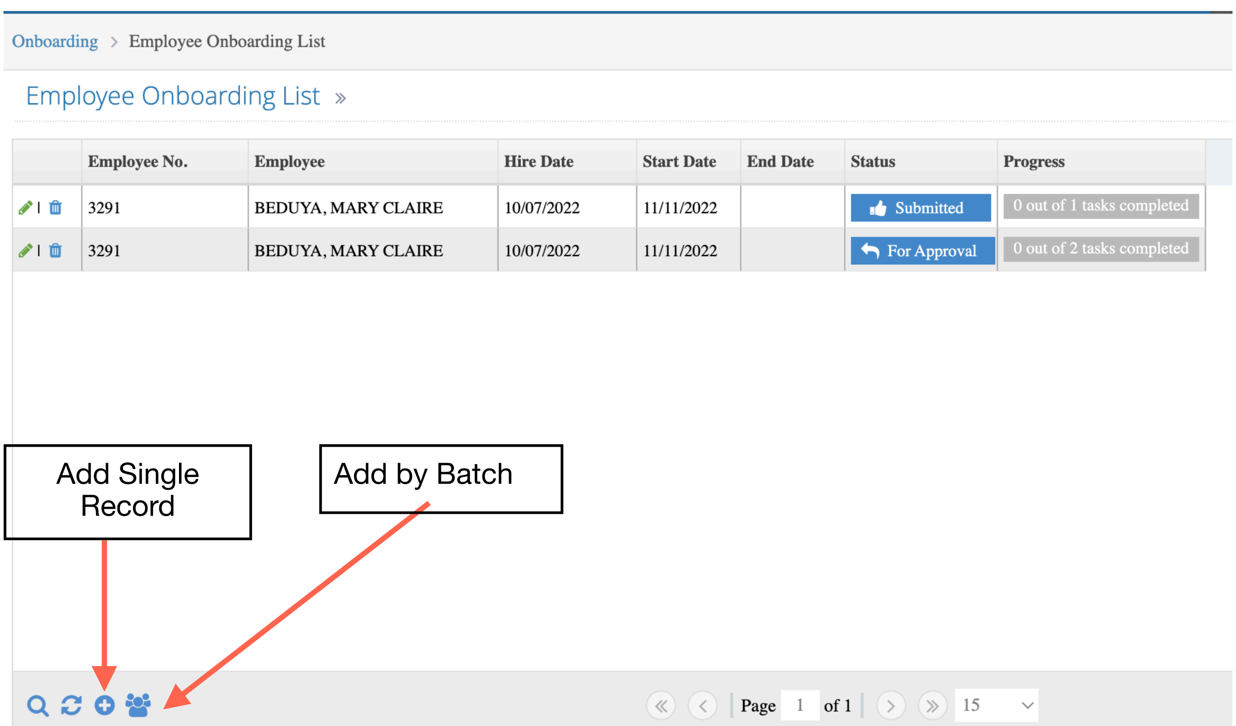



This is where you initiate a new onboarding checklist for a new employee, you can also check the progress of other onboarding employees here.

# How to assign checklist to an onboarding employee?

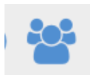
1. On the left part, click Onboarding > Employee Onboarding



# 2 ways to add an Employee Onboarding

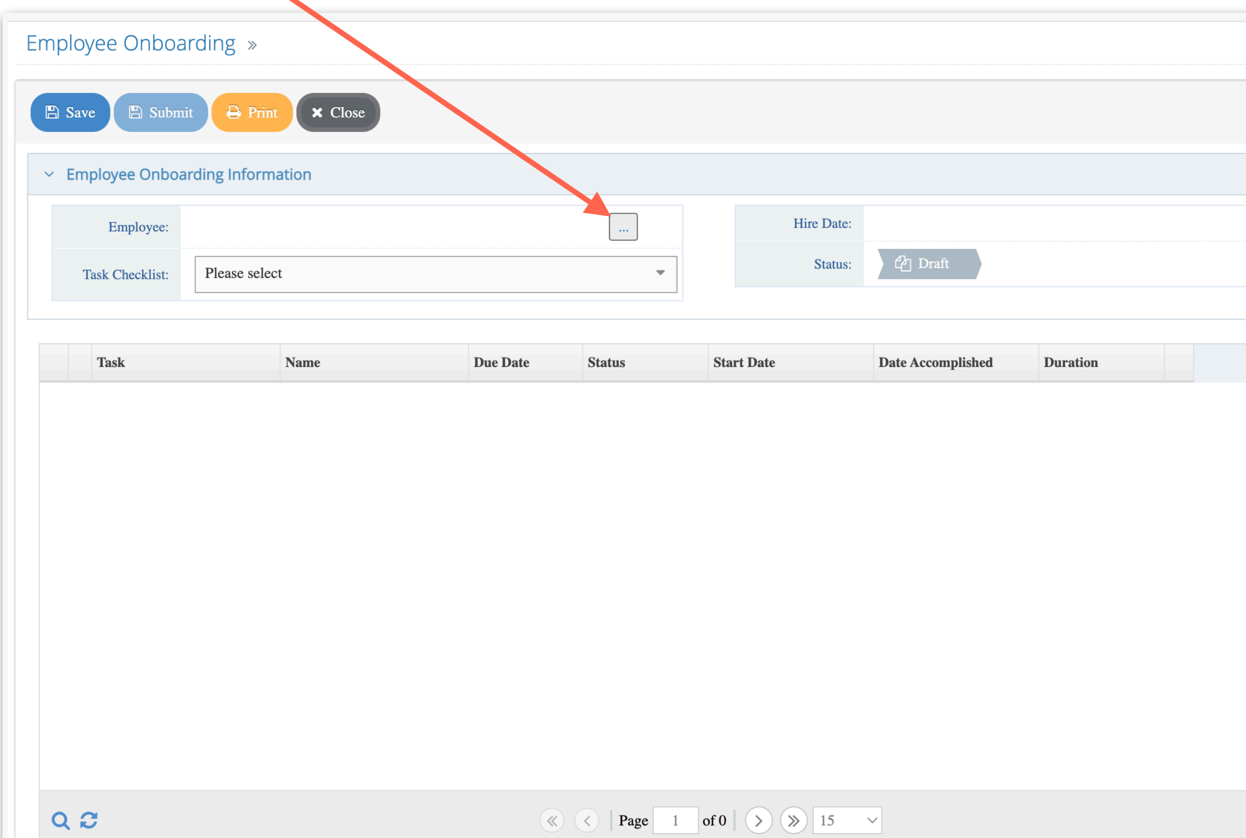
Add single record



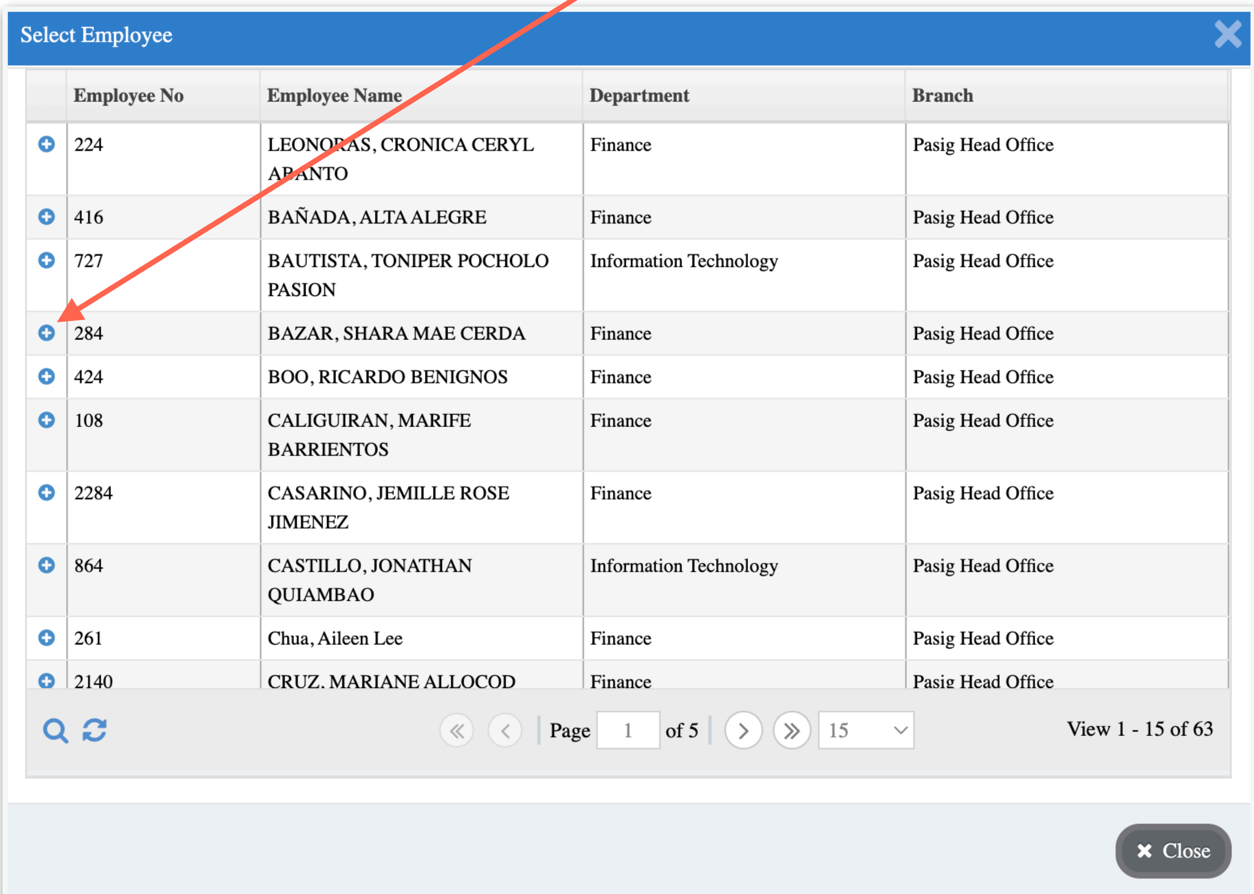
Add by batch record

## Add single record

A. Click the "…" button to select an employee.



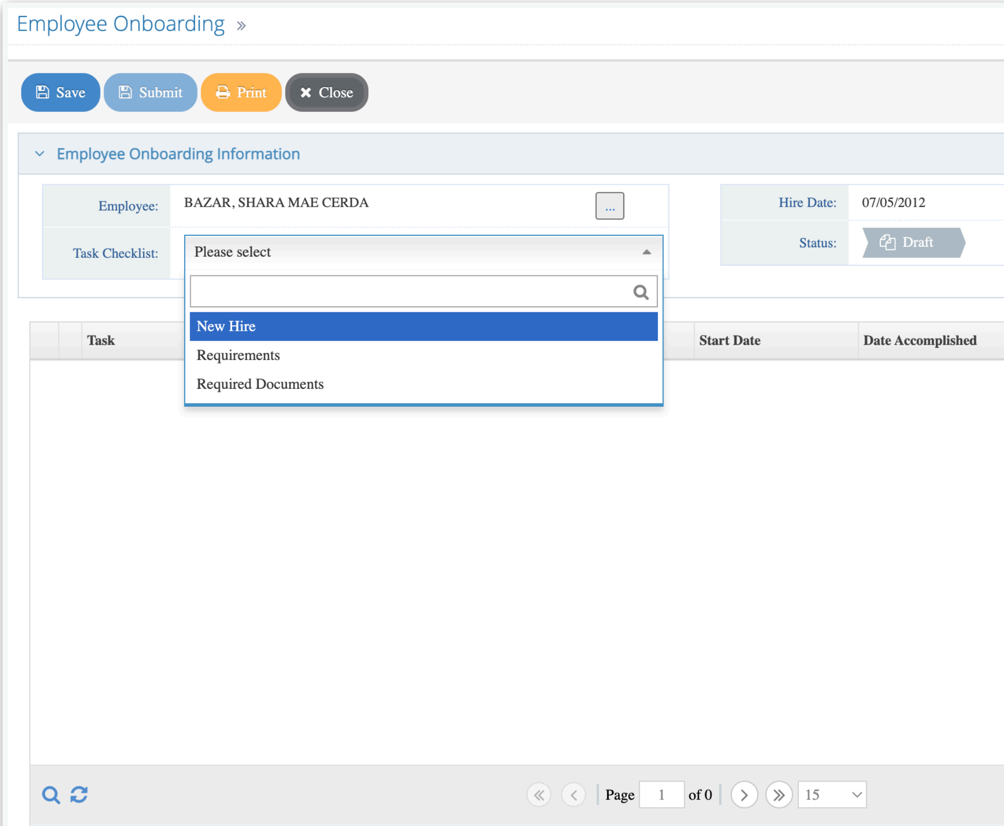
B. Select an employee by clicking the (+) button on the left side of their name.



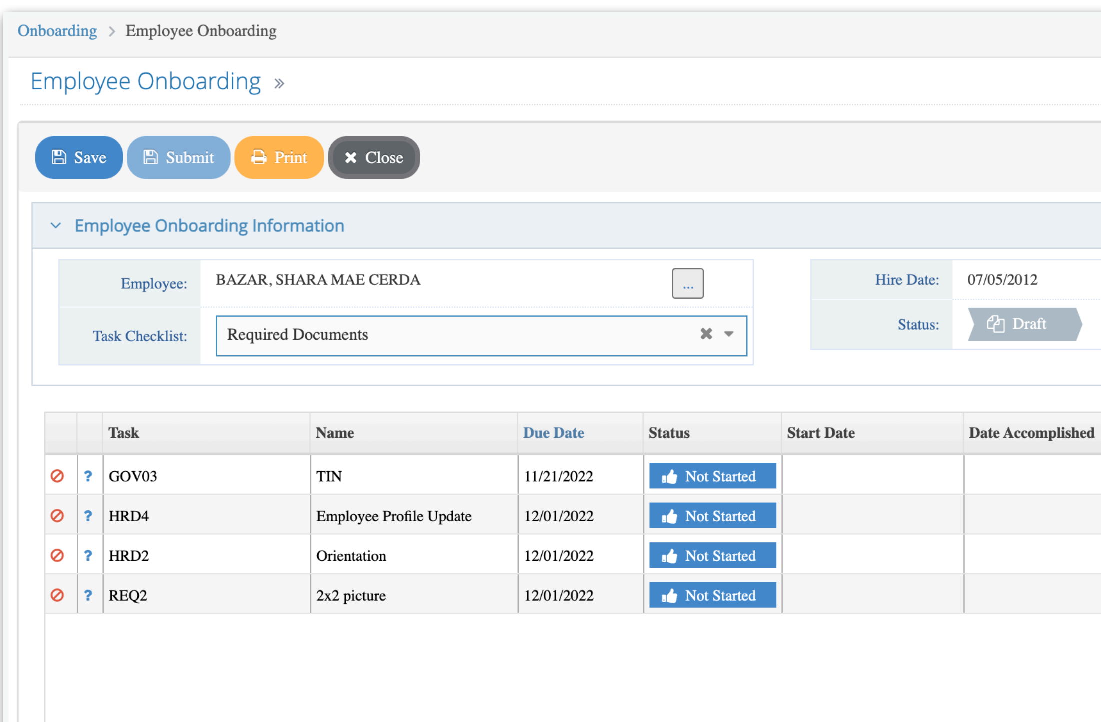

| Employee No | Employee Name | Department | Branch |
|---|---|---|---|
| 224 | LEONORAS, CRONICA CERYL APANTO | Finance | Pasig Head Office |
| 416 | BAÑADA, ALTA ALEGRE | Finance | Pasig Head Office |
| 727 | BAUTISTA, TONIPER POCHOLO PASION | Information Technology | Pasig Head Office |
| 284 | BAZAR,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

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

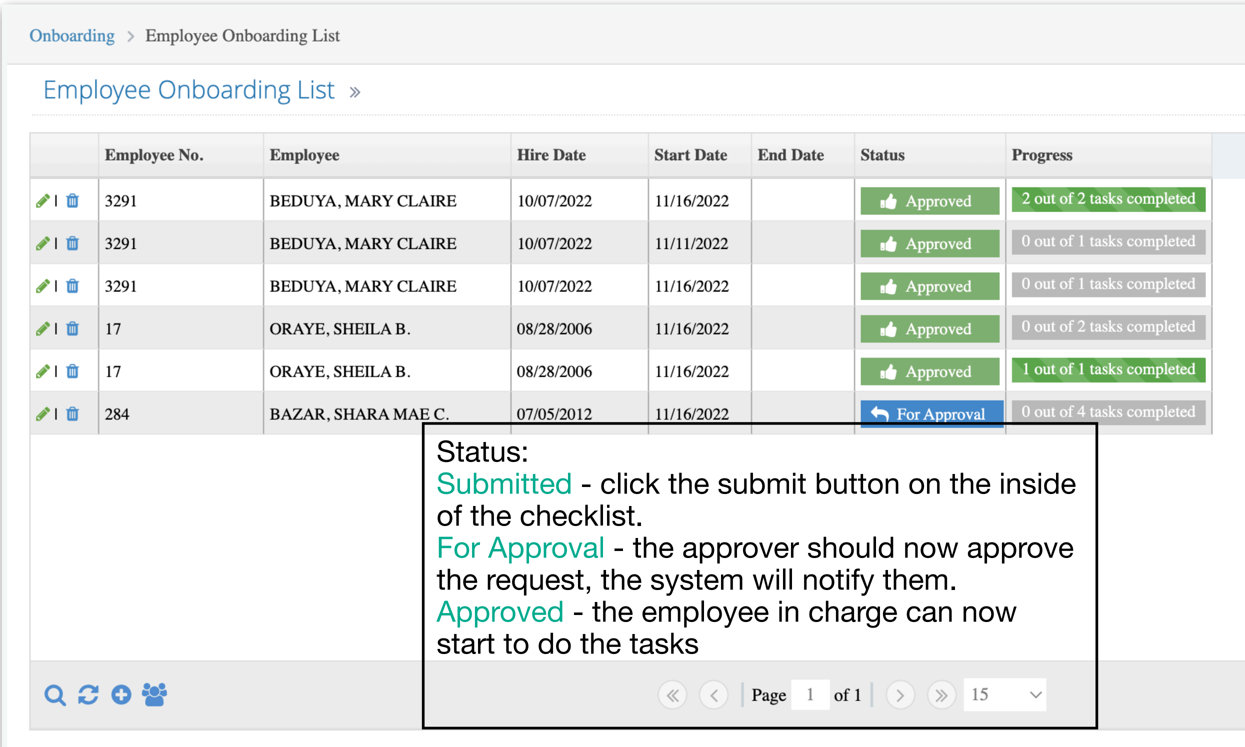
C. Select a task checklist for this employee.




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

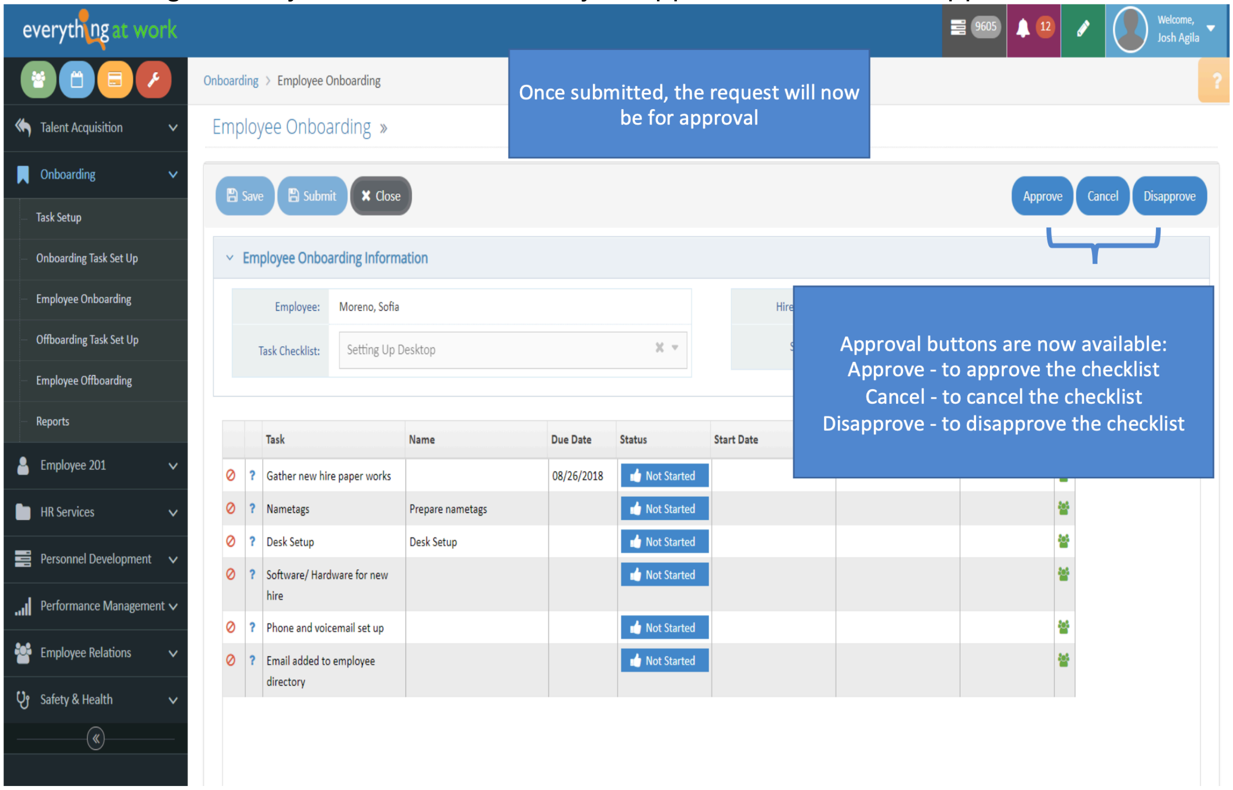


E. Click “Close” to go back to the Employee Onboarding List. You will see that the status is for approval. The e@work will notify the assigned approver through their HR portal account.



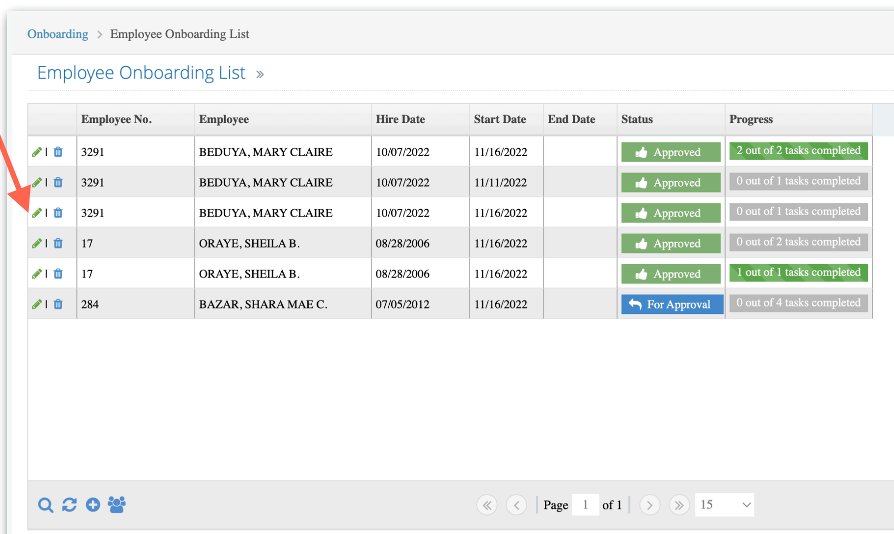
# How to approve a task checklist

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



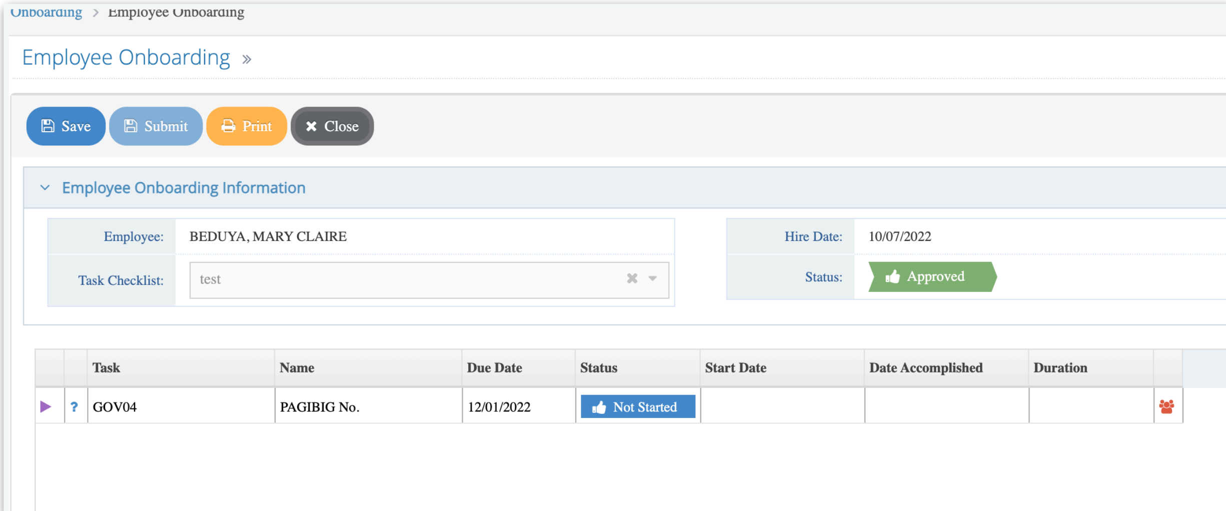

# Start the task of the employee using account as an HR:

A. Click the “Edit” button to go to the tasks that is to be started.

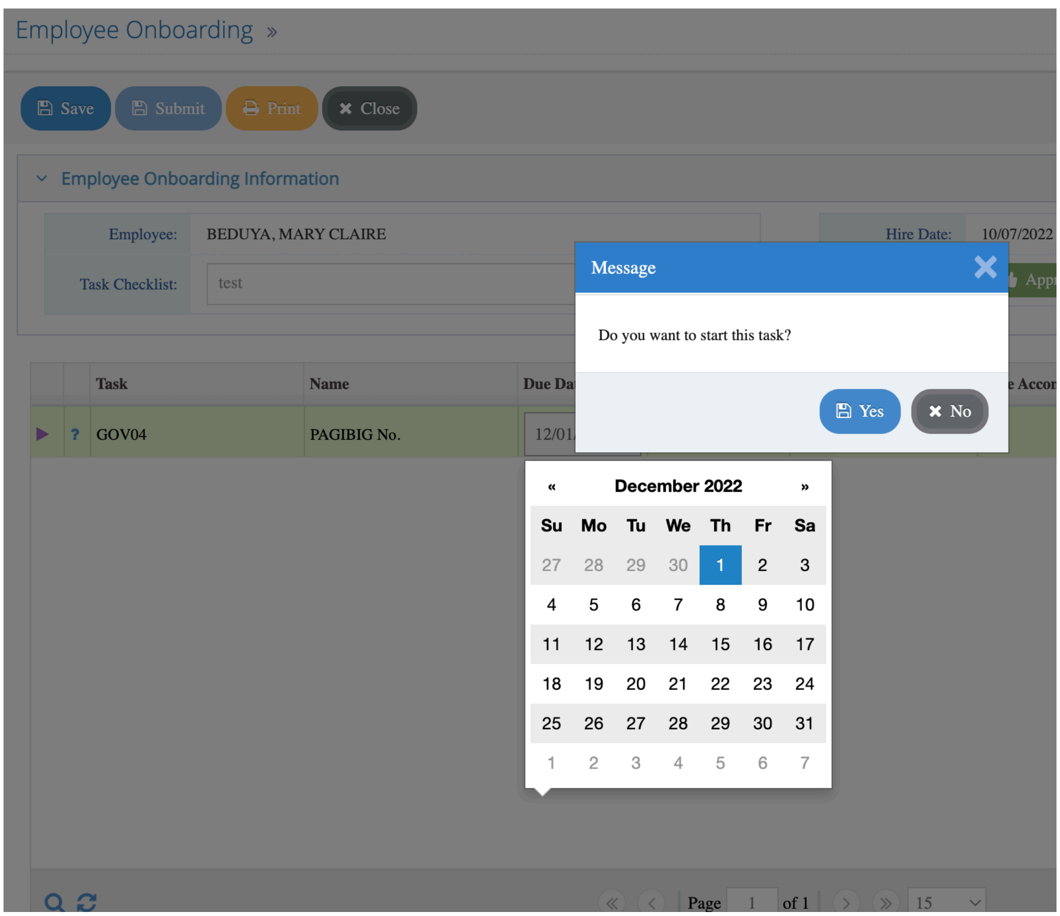



| Employee No. | Employee | Hire Date | Start Date | End Date | Status | Progress |
|---|---|---|---|---|---|---|
| 3291 | BEDUYA, MARY CLAIRE | 10/07/2022 | 11/16/2022 | | Approved | 2 out of 2 tasks completed |
| 3291 | BEDUYA, MARY CLAIRE | 10/07/2022 | 11/11/2022 | | Approved | 0 out of 1 tasks completed |
| 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 |

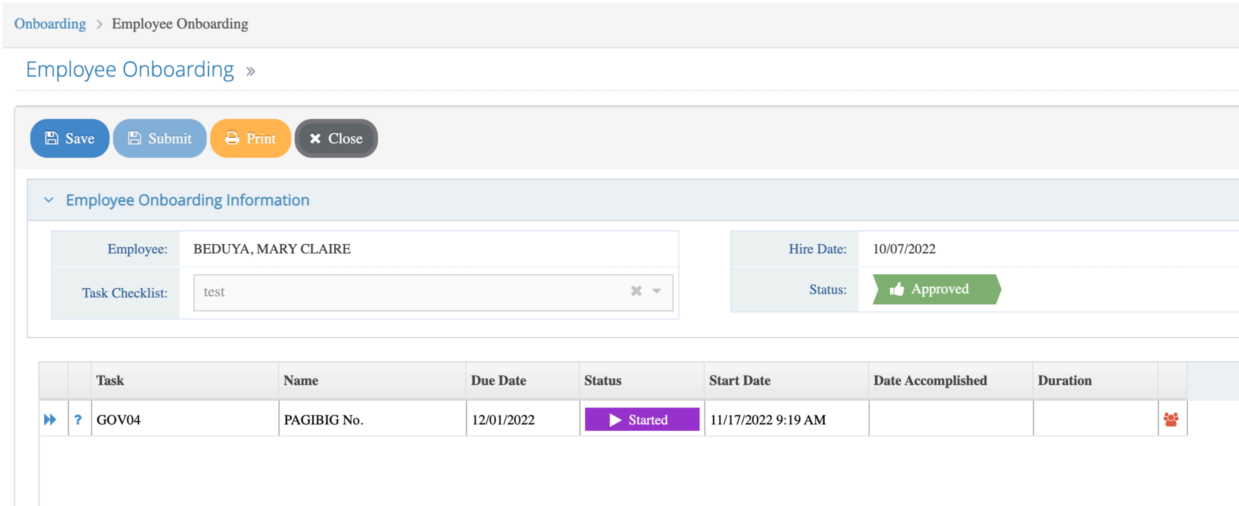
B. Click the “Play” button to start the task.




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.



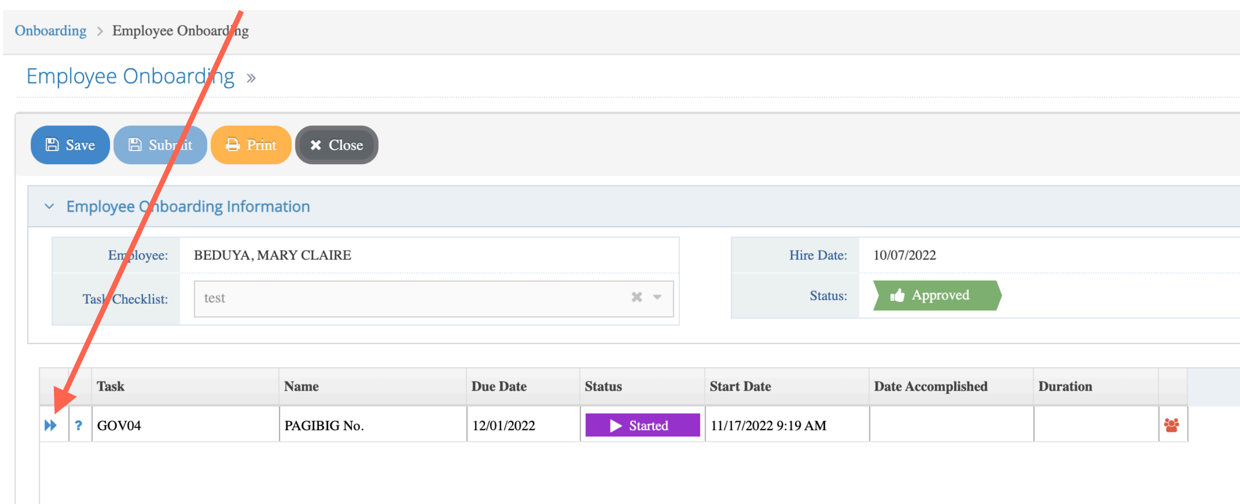
D. The status will now be updated into started.



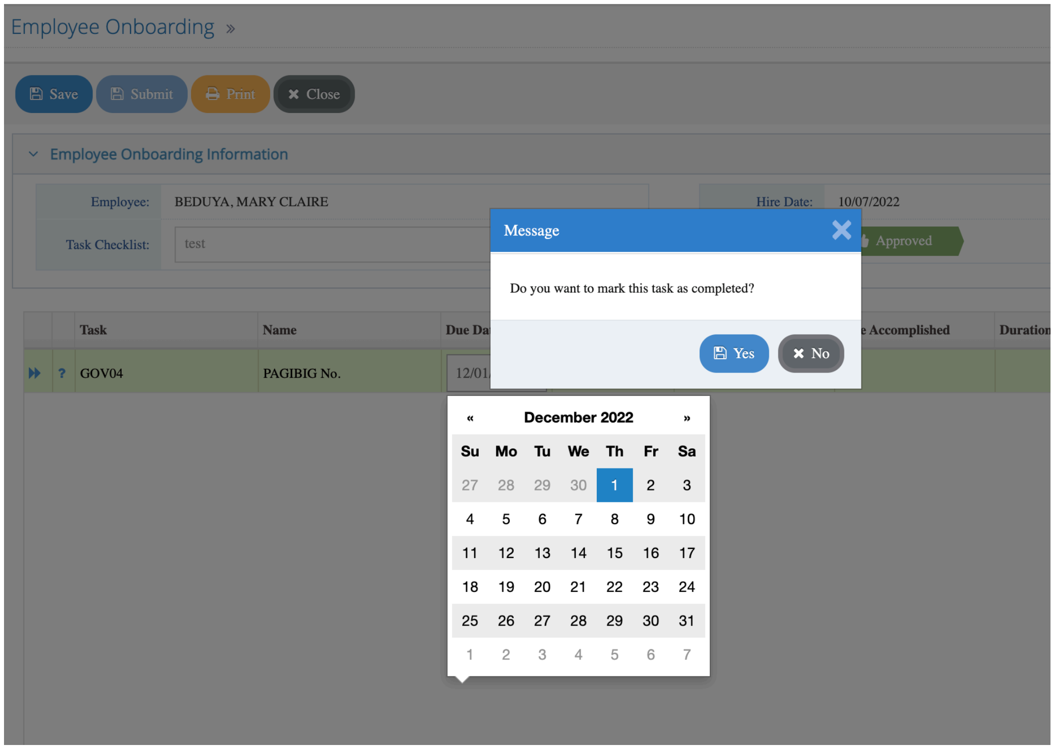

**Mark Task as Completed as an HR**

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.

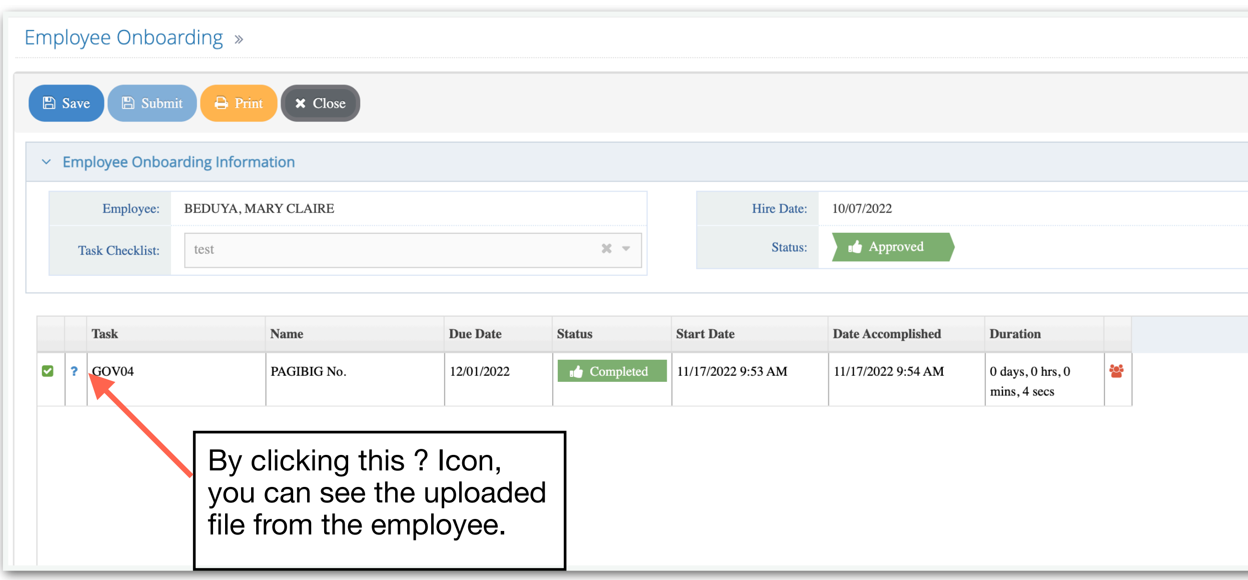
A. Click the “Forward” button to mark the task as Completed.



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



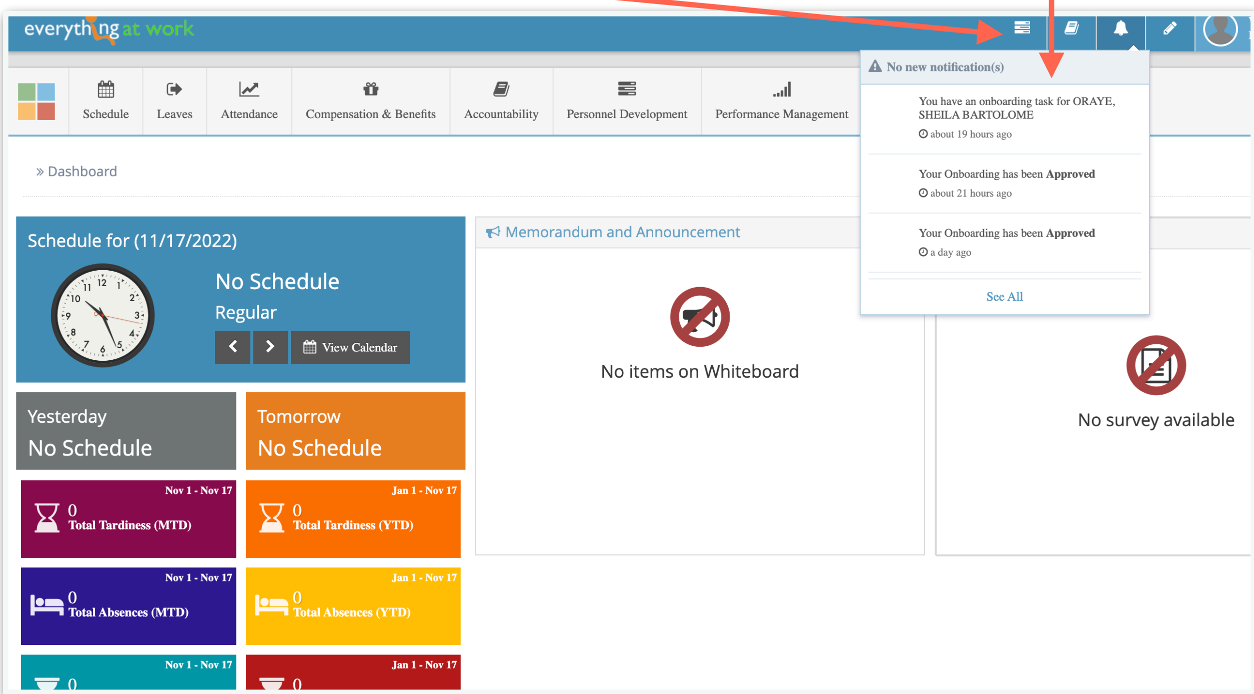

C. The status will now be updated as completed as well as the date accomplished and the duration how long the task is done.



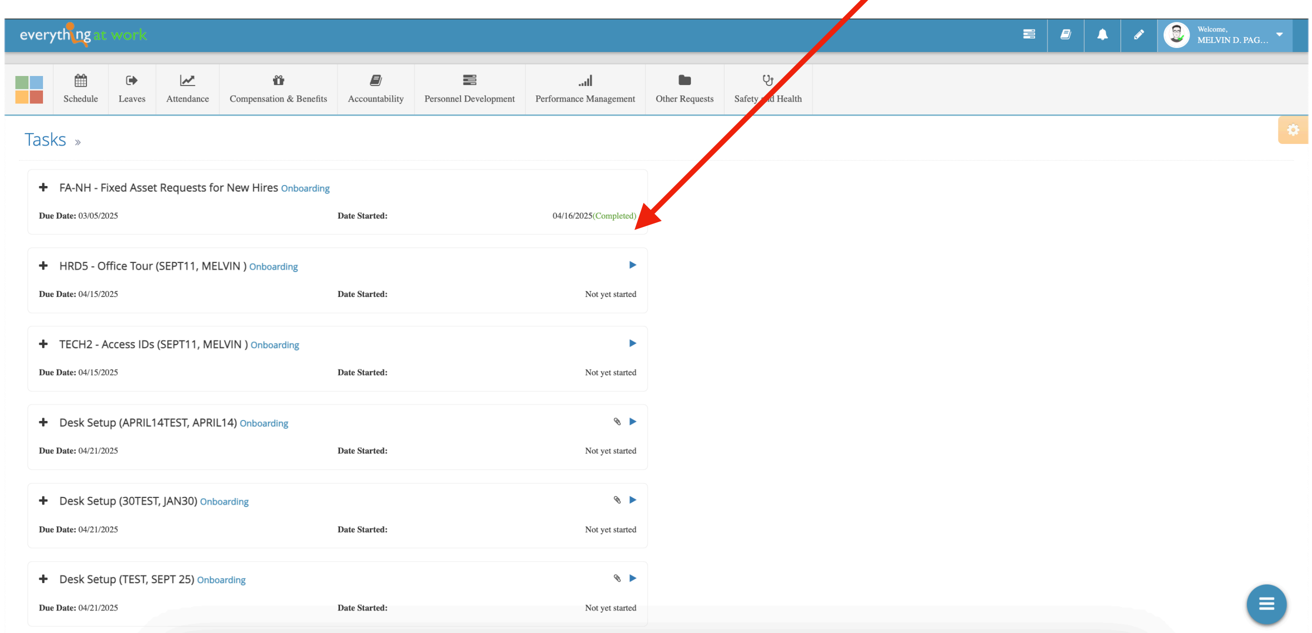
# Start the task of the employee on Employee Portal:

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.

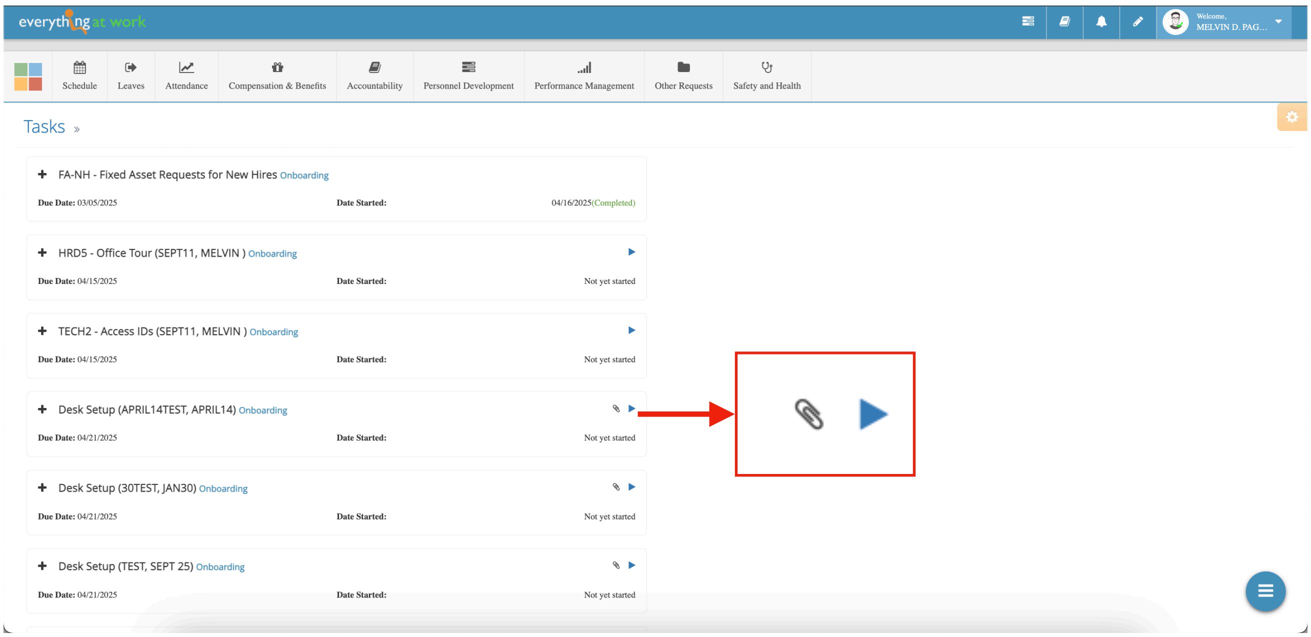
A. Go to the tasks, click the task button.



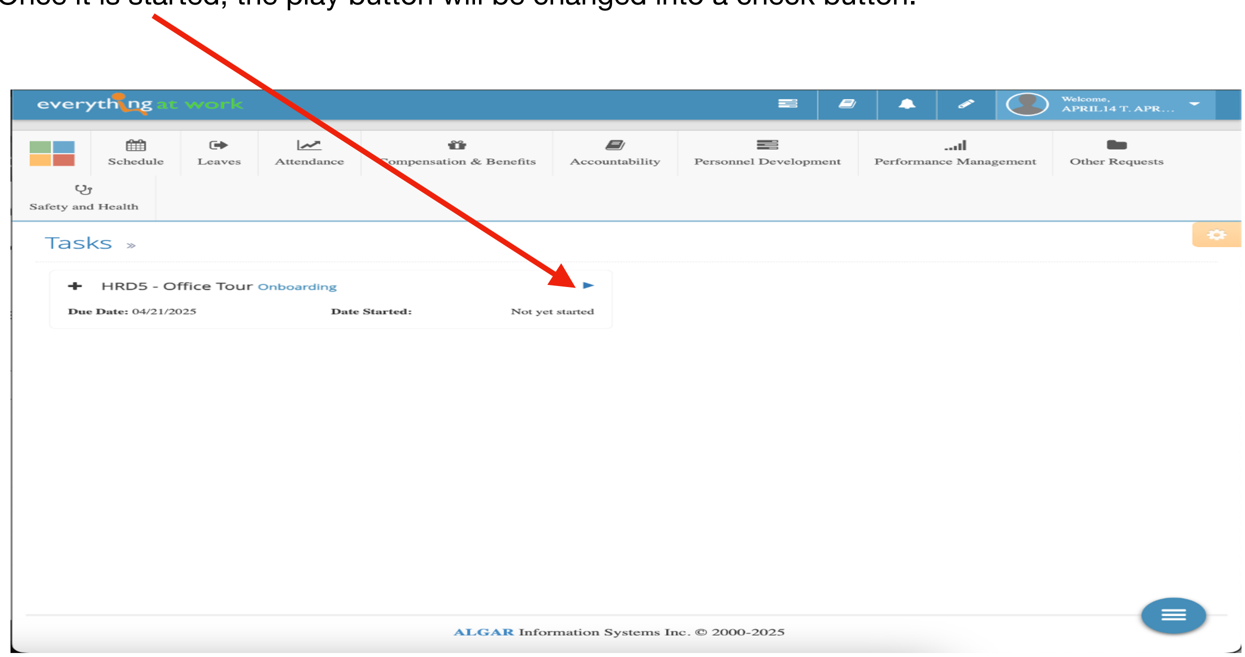

B. Tasks assigned to you will be listed like this. In this case, this tasks are completed. If a task has not yet been completed, you will see a paper clip icon on the right side for attaching a file, and a play button to start the task.



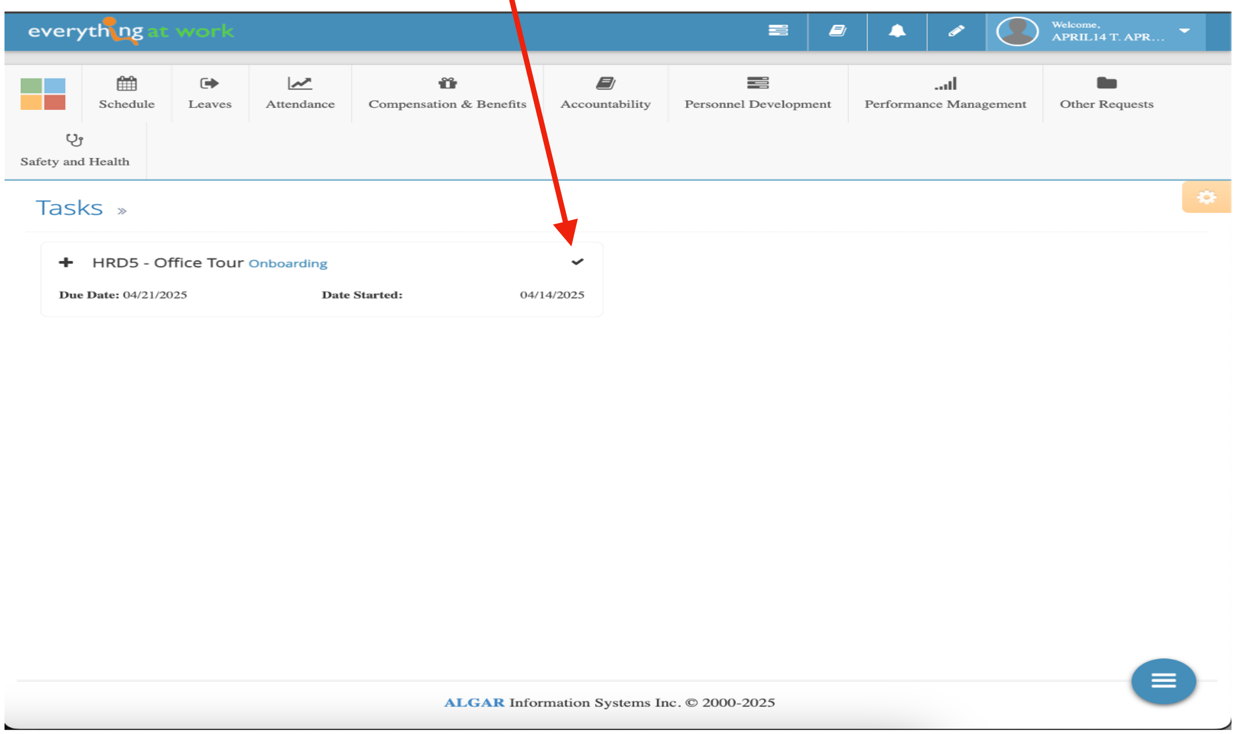
C. If a task has not yet been completed, you will see a paper clip icon on the right side for attaching a file, and a play button to start the task.




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



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)