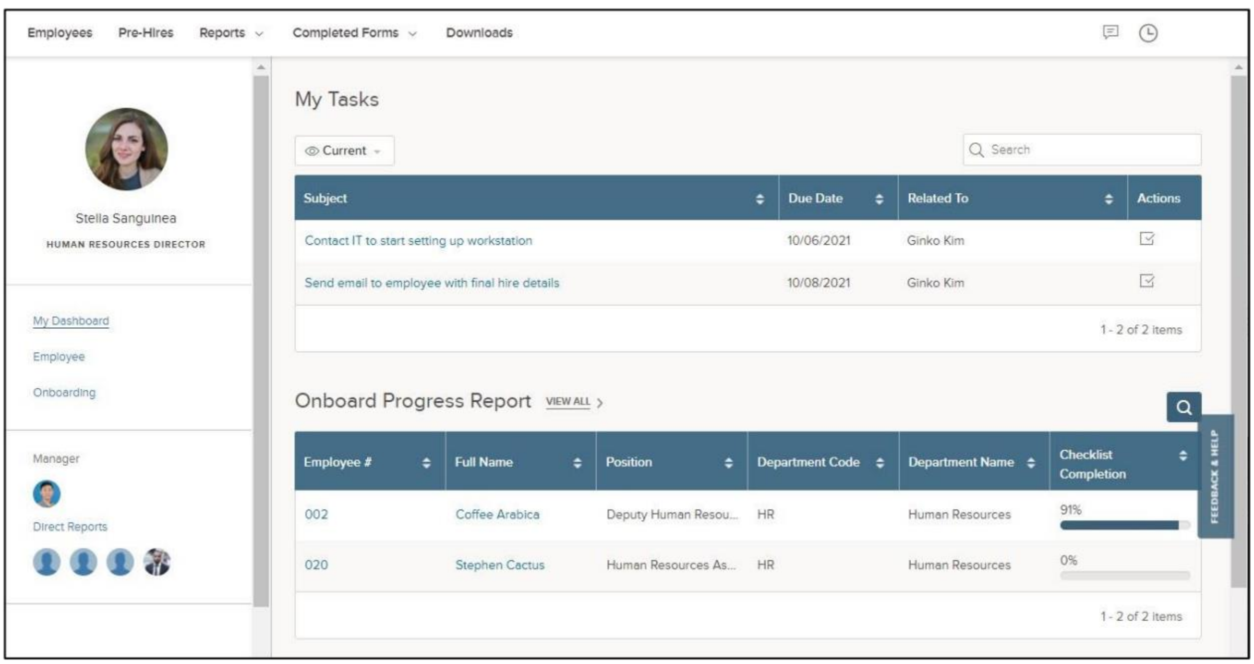
Main Self Service Dashboard

Upon logging in with your NEOGOV account, you will see your Dashboard. This is a single central hub for you to manage tasks, see your direct reports, and update your personal details.

Your Dashboard is made up of widgets that organize information and actions for your staff. These widgets allow you to take action right from this page, and include important metrics, filters and key information so you can focus on the highest priority tasks.

Manager's View of Onboard

Managers have access to menu options that will help them keep track of and interact with the employee profiles of their hierarchy.



The **My Dashboard** page serves as a manager's landing page in Onboard.

The navigation bar allows you to access various pages within Onboard. From left to right, you can view the following:

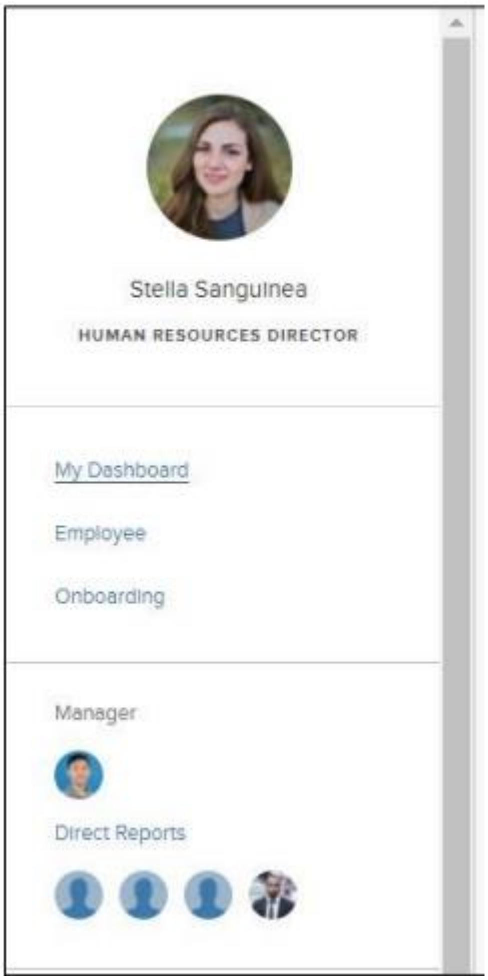
• The Employee List displays a list of employees who are within your scope

• The Pre-Hires List displays a list of pre-hires who are within your scope

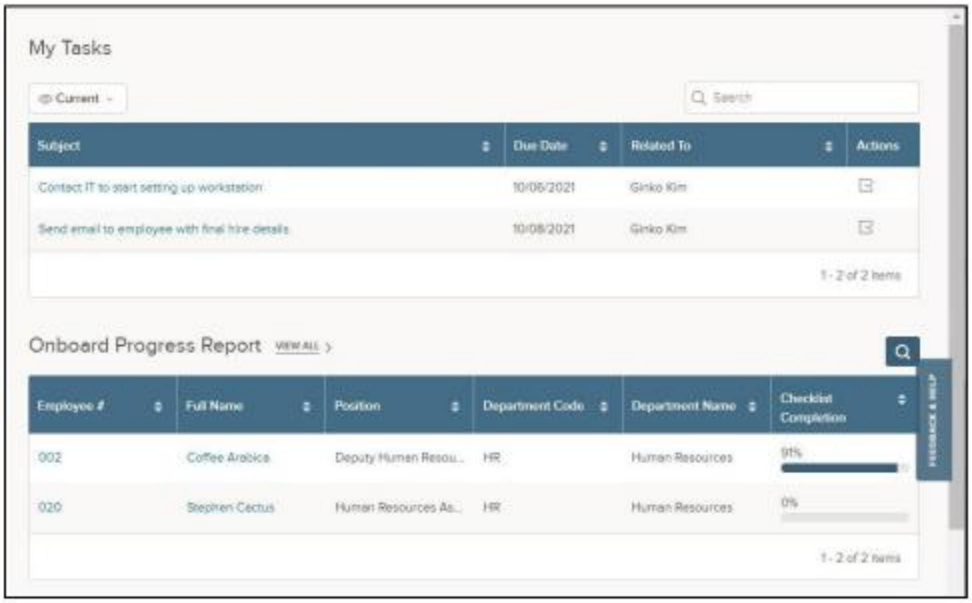
• Select Reports to run reports on the employees who are within your scope. The available reports are: Onboard Progress, Offboard Progress, Preboard Progress, Checklist Progress, and Task Status.

• Select Completed Forms to run reports on completed forms for employees who are within your scope

• Downloads takes you to your downloads list. From here, you can download completed form export jobs.



From the **side menu**, you can access your dashboard, your employee details page, and your own onboarding portal. You can also view your manager and your direct reports. Please note that while you can view the employee profiles of your direct reports and hierarchy, you will not be able to view the employee profile of your direct manager.

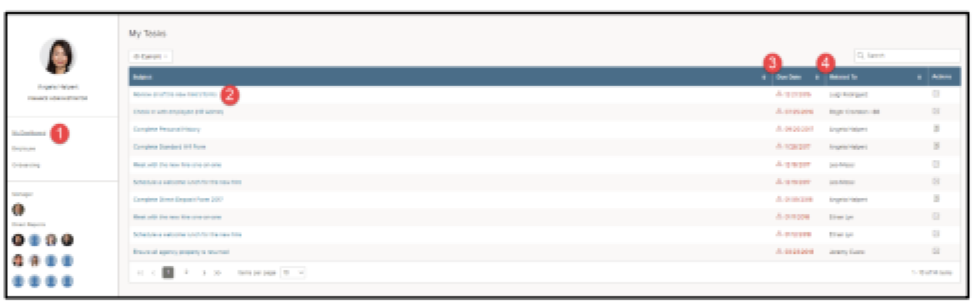


• The **My Tasks** section of the dashboard shows you all your current tasks. You may also filter for completed, canceled, pending or skipped tasks.

• The **Onboard Progress Report** generates the onboarding percentage completion status for each employee who has checklists assigned. HR determines your role in the Onboard process. Select view all to view the full Onboard Progress Report.

Complete Checklist Tasks as a Checklist Contributor

Managers or staff who help to facilitate the onboard process may be required to complete tasks for direct reports or other employees being onboarded. It is best practice for these individuals acting as additional checklist contributors to complete their tasks from their **My Dashboard** page.



1. **My Dashboard**: Additional checklist contributors complete their current Tasks here

2. **Current Tasks**: Click on the task title to complete the Task

3. **Due Date**: The due date of the Task

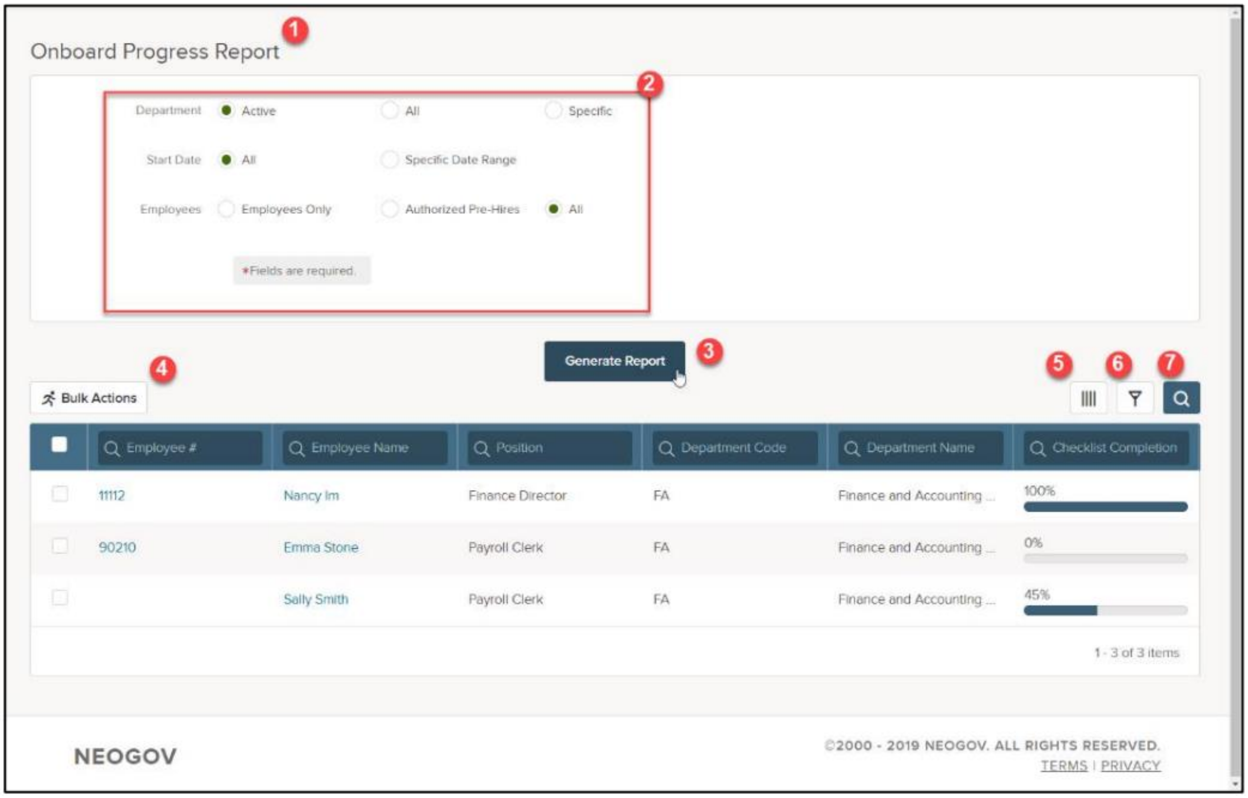
4. **Related To**: Which new hire the Task is related to

Manager Access to Employee Forms

Managers and other staff who help to facilitate the onboard process (e.g. IT, payroll) may have access to the profiles of other employees in the system. HR configures which forms these users have access to.

Reports

To run a report for employees that are within your hierarchy, select the Reports menu option and then select the desired report.



1. The name of the report is listed here

2. Set your parameters

3. Click **generate report** when ready

4. Select **bulk actions** to export the list information into pdf, excel, or csv format. If you wish to export

the list data, please first toggle the records you would like to export.

5. Use the **column** icon to edit the columns in the list view

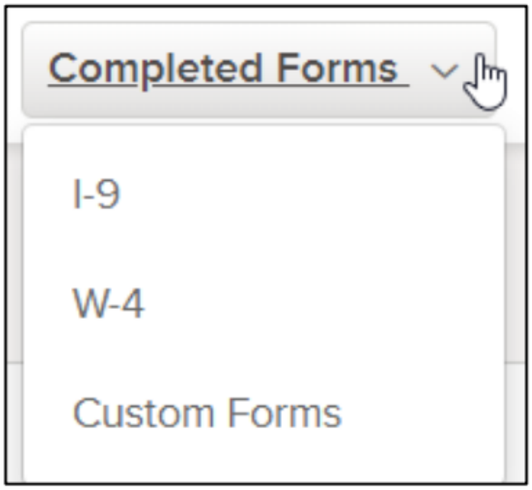
6. User the **filter** icon to filter the data displayed in the list view

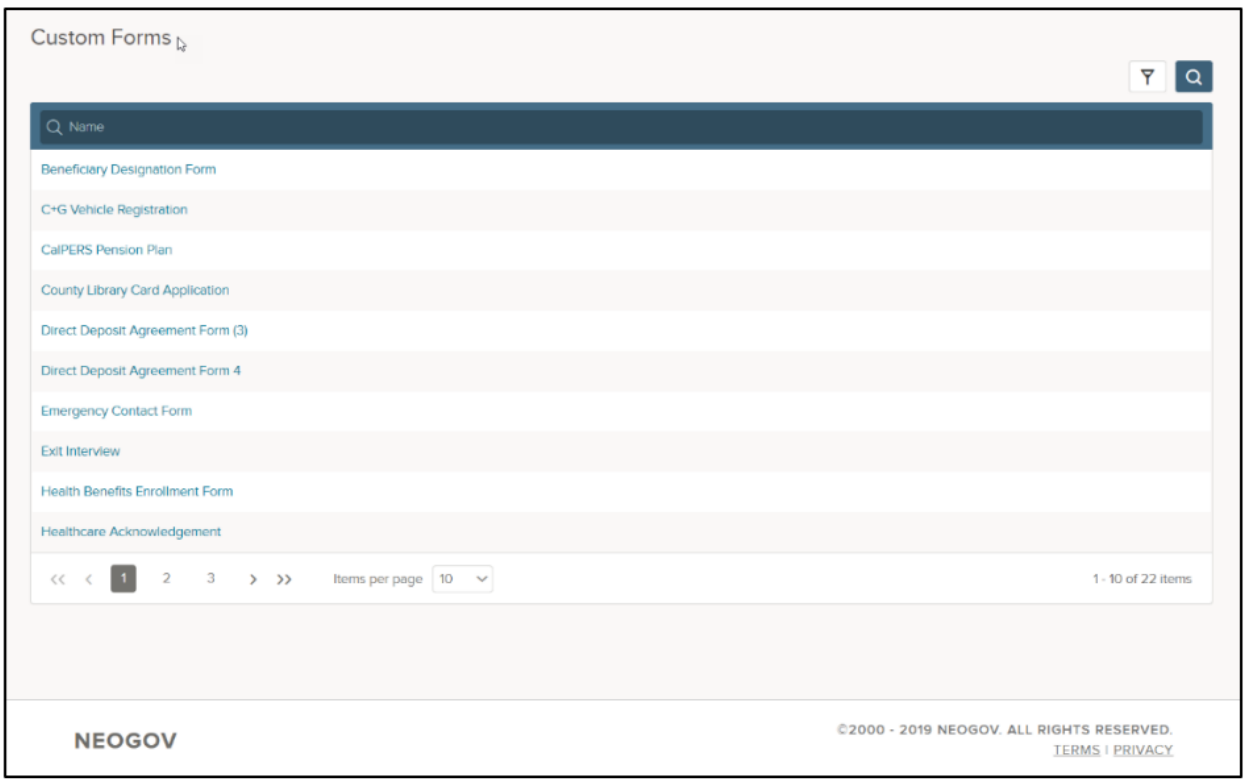
7. User the **magnifying glass** to close the column headers to search. This will then allow you to sort

the data displayed in the list view by clicking on a column header.

Completed Forms

The completed forms reports allow you to generate reports on forms completed by employees within your hierarchy.





Please keep in mind that HR determines access to forms and form data. You may not be able to generate a completed form report if HR did not give you permission to access to that form (e.g. managers might not be given access to direct deposit forms, I-9s, W-4s, etc.). Please contact your HR team if you have questions regarding forms for employees within your hierarchy.

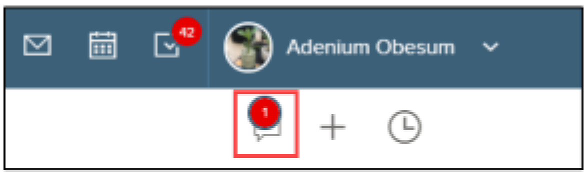
Mentors Widget

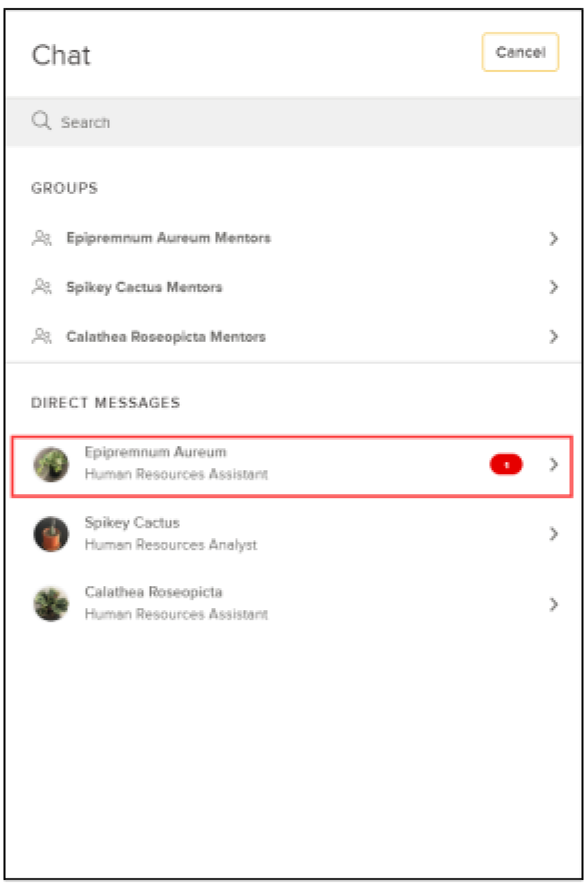
The Mentors Widget allows your agency to connect new hires to their direct managers and other experienced employees within the agency. HR determines the mentor-mentee relationships. Please note - this widget is only available on the Home Onboarding Portal.

Mentor Chat View

When a mentor receives a chat from a mentee, they receive an email notifying them a conversation has started with their Mentee. Either log in to Onboard to view the chat or click the link from the email to be directed to Onboard.

Mentors can use the Chat icon in the Navigation menu to view and respond to messages. In the view below, we are logged in as a mentor.





Preboarding and Pre-Hires

Preboarding is used to assign tasks and share relevant information with potential employees prior to when they have been hired. This allows agencies to add those Pre-Hires into the system without an employee number, agency email, exact start date, or position.

An agency's preboarding experience may differ greatly from its onboarding experience. Please keep in mind that if you are a pre-hire, you may not have access to the same tasks, forms, and checklists as an employee. However, the way you access your portal, complete checklists, and manage your forms will be the same.

Pre-hire Statuses

Pre-hires can be in one of two statuses: **pre-hire** or **authorized pre-hire**. When a Pre-Hire completes their Preboard checklist(s) and is ready to begin on the Onboard checklist(s), an agency may decide to authorize a pre-hire. Authorizing a Pre-Hire occurs before the Pre-Hire is assigned an Employee Identification Number and work email address. This also allows Pre-Hires to complete Onboard tasks that are not contingent on pre-hiring tasks.

Pre-hires have access to the **pre-hire** and **preboarding** options on the left-hand sidebar.

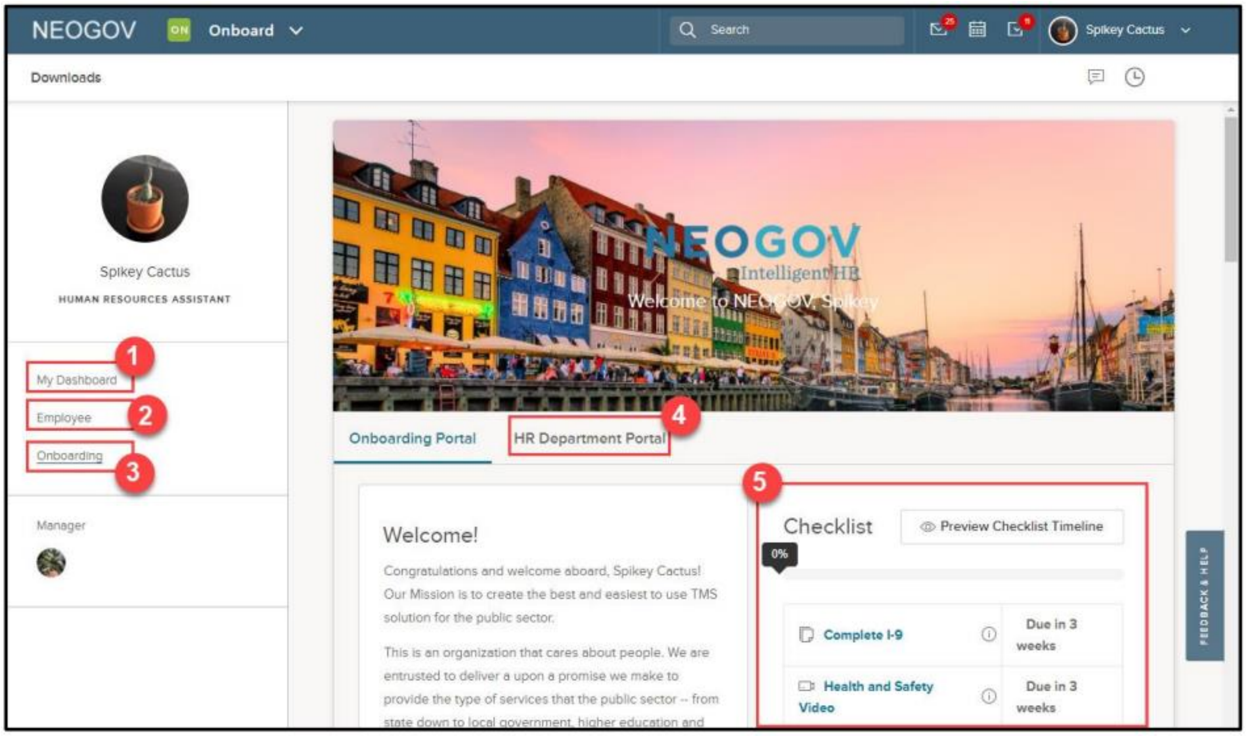
Notice that the employee details label has been replaced with the **pre-hire details** label. The status field also indicates that a pre-hire is in the **pre-hire status**.

Authorized Pre-Hires have access to the **pre-hire** and **onboarding** options on the left-hand sidebar.

Notice that the employee details label has been replaced with the **pre-hire details** label. The status field also indicates that a pre-hire is in the **authorized pre-hire status**. Authorized pre-hires no longer have access to the preboarding portal and instead have access to onboarding portals. Authorized pre-hires may complete any Onboarding checklists assigned to them as well as any incomplete preboarding checklists.

Employee's View of Onboard

When the new hire logs into Onboard, they land on the Onboarding Portal. From here they can complete tasks, browse through all the helpful information on their portal(s), and access their Dashboard and their Employee Details page.



1. My Dashboard: Displays all current tasks the employee needs to complete by default

    a. They can also view any Completed, Canceled, Pending, or Skipped tasks

2. Employee: Displays all employee information, tasks, notes and attachments, and forms

    a. Employees can attach any documents or notes, as well as view any attachments other users have added to their page

    b. Any completed form is available to print

3. Onboarding: Returns the employee to their Onboard Portal

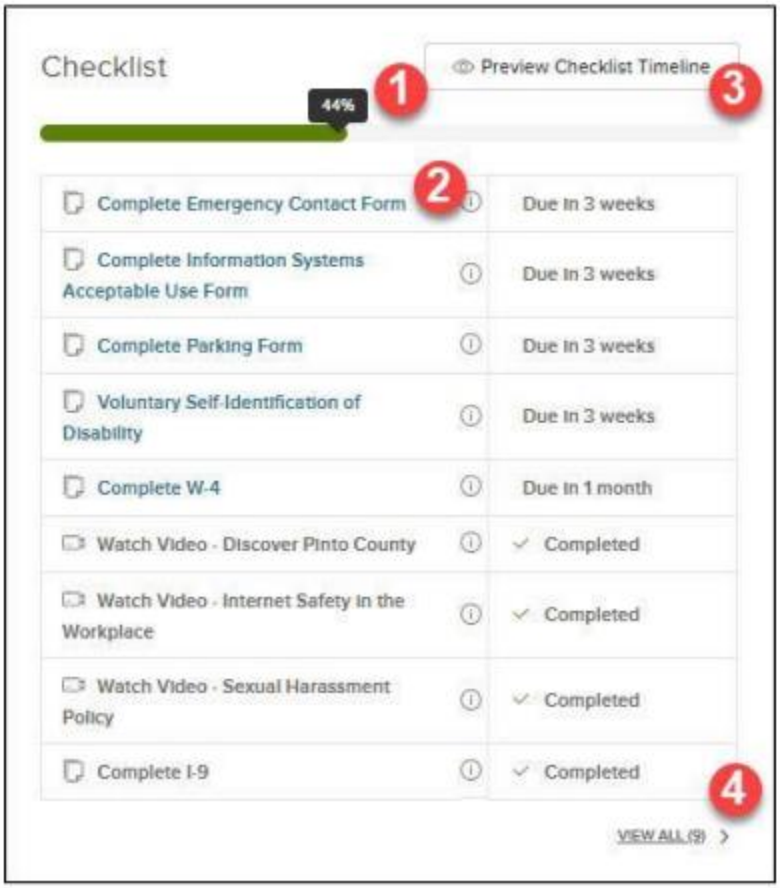
4. Sub-portal: Sub-portals may be available to employees depending on what position, class spec, division, or department they occupy

5. Checklist Widget: Where all To-Do tasks are listed.

Widgets

Checklist Widget

The **checklist widget** is stored on the home portal. All checklists, no matter how they are assigned to an Employee, display on the home portal.



1. The completion progress bar updates as pre-hires or employees complete their assigned task

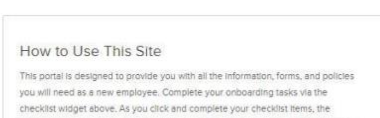
2. Click on tasks to complete them

3. Click on the preview checklist timeline button to display each task's due date relative to the employee's start date

4. Click view all to view all assigned checklists and tasks

Text Widget

Text widgets are used to display helpful text such as a welcome message, onboarding tips, or next steps after being onboarded.



Picture Widget

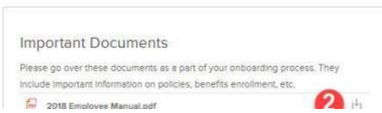
Picture widgets act as photo galleries and can include photos of staff, buildings, maps, and more.

Video Widget

Video widgets are used to highlight important agency videos.

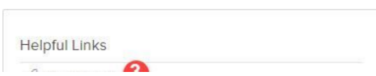
Document Widget

Document widgets may include important documents that employees should read as reference (e.g. policies, handbooks, manuals, etc.) Click on the download icon to download the document.



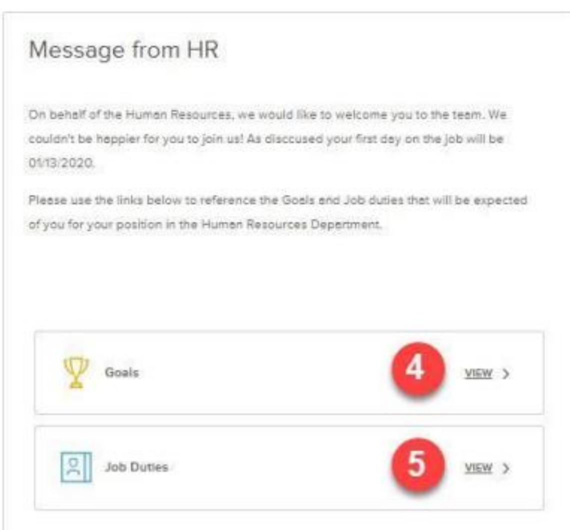
Link Widget

Link widgets allow your agency to provide helpful and important links to external sites, downloads, intranet pages, and more. Click on the link to be redirected to the external site.



Job Clarity Widget

The Job Clarity Widget is a great tool that agencies can use to set expectations for new hires. Employee goals may be visible in the Job Clarity Widget if your agency has NEOGOV Perform. Information from the employee's class spec (i.e. job description) or job posting may be visible in this widget.

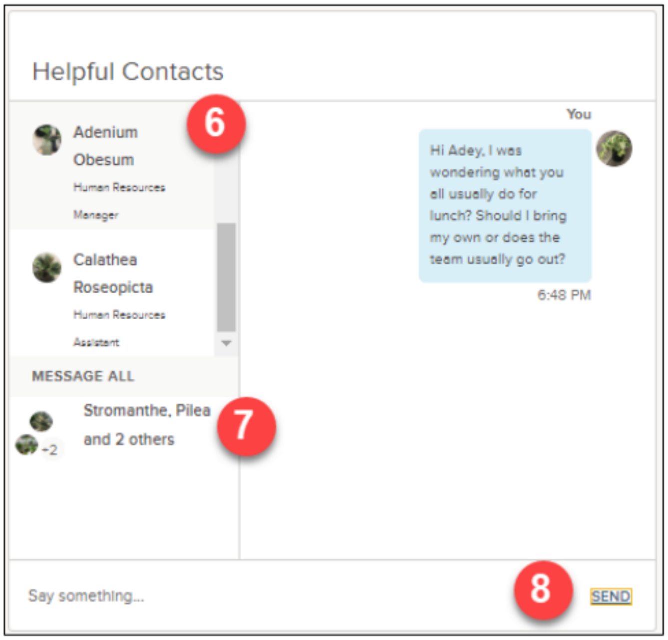


Mentors Widget

The Mentors Widget allows your agency to connect new hires to their direct managers and other experienced employees within the agency. HR determines the mentor-mentee relationships. Please note - this widget is only available on the Home Onboarding Portal.

Mentee Chat View

If an employee is a mentee, they use the Mentors widget from the main Onboarding portal. In the view below, we are logged in as a mentee.



(Mentee Chat View)

6. Mentor names are listed for one-on-one conversations

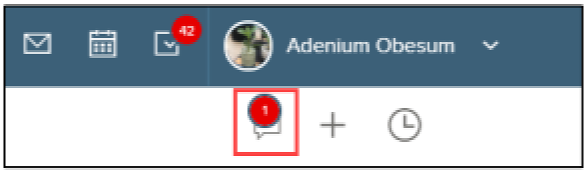
7. Mentor names are together for group conversations

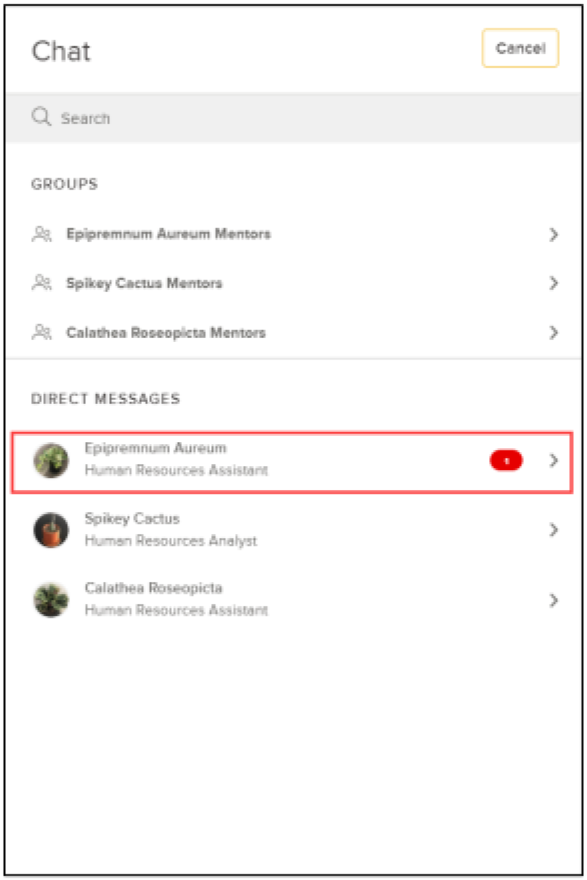
8. Type something in the **Say Something** text box and click **Send** or push enter on your keyboard to deliver your message to a mentor

Mentor Chat View

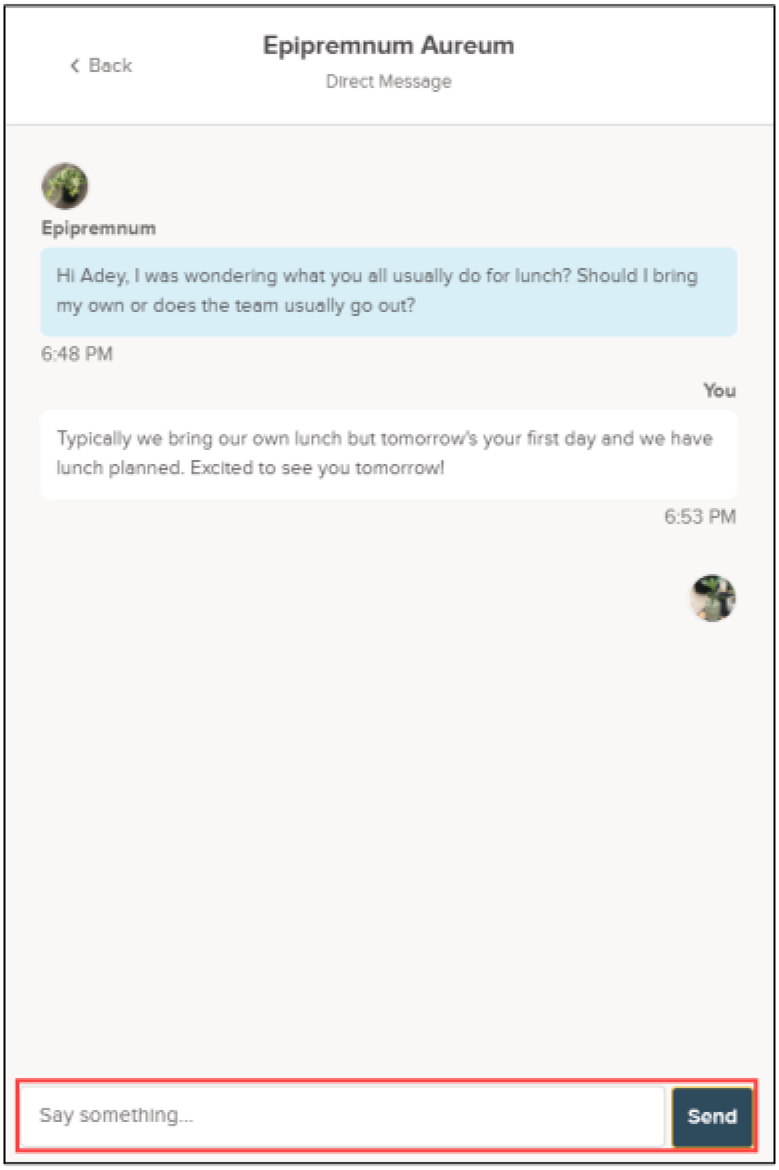
When a mentor receives a chat from a mentee, they receive an email notifying them a conversation has started with their Mentee. Either log in to Onboard to view the chat or click the link from the email to be directed to Onboard.

Mentors can use the Chat icon in the Navigation menu to view and respond to messages. In the screenshots below, we see the mentor's view.





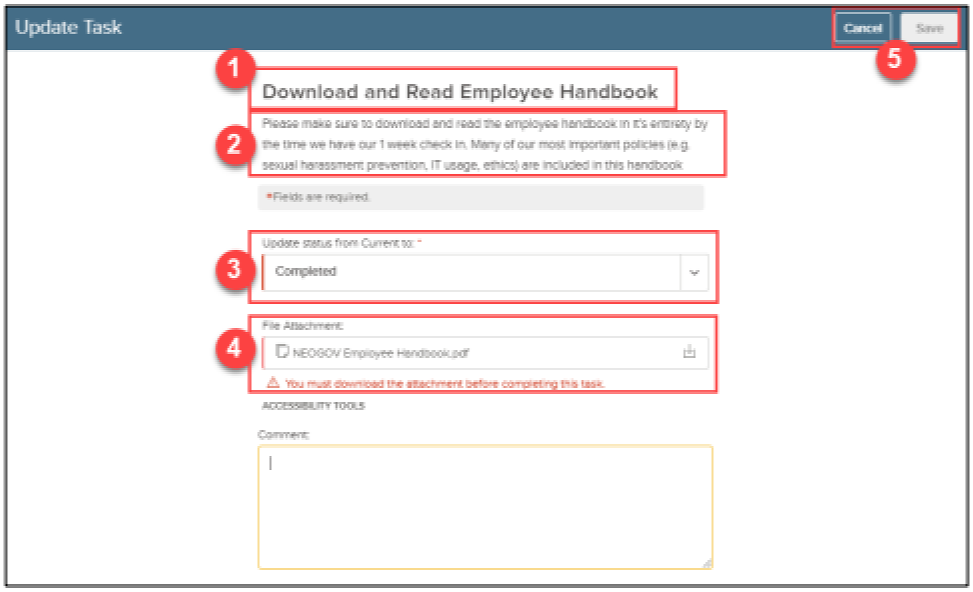
Locate the unread message and select the name of the mentee to open their chat window.



Complete Checklist Items as a New Hire

It is best practice for the employee (i.e. new hire) to complete Onboarding Tasks from their main **Onboard Portal** via the **Checklist Widget**. All possible task types are listed below.

Manual Task



1. The **subject** of the task is indicated in large font at the top

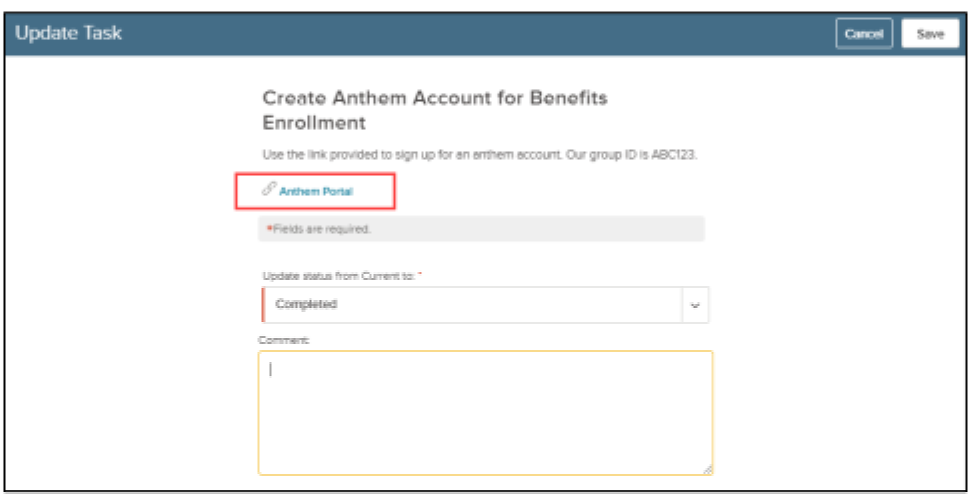
2. Be sure to read the **description** if provided. The description supplements the subject.

3. The **status dropdown** allows you to update the task's status

4. Select the **download icon** to download the included attachment

5. Click **save** to complete the task. Note – if an attachment is included, you must download the attachment before completing the task. Click **cancel** to exit the window.

Links

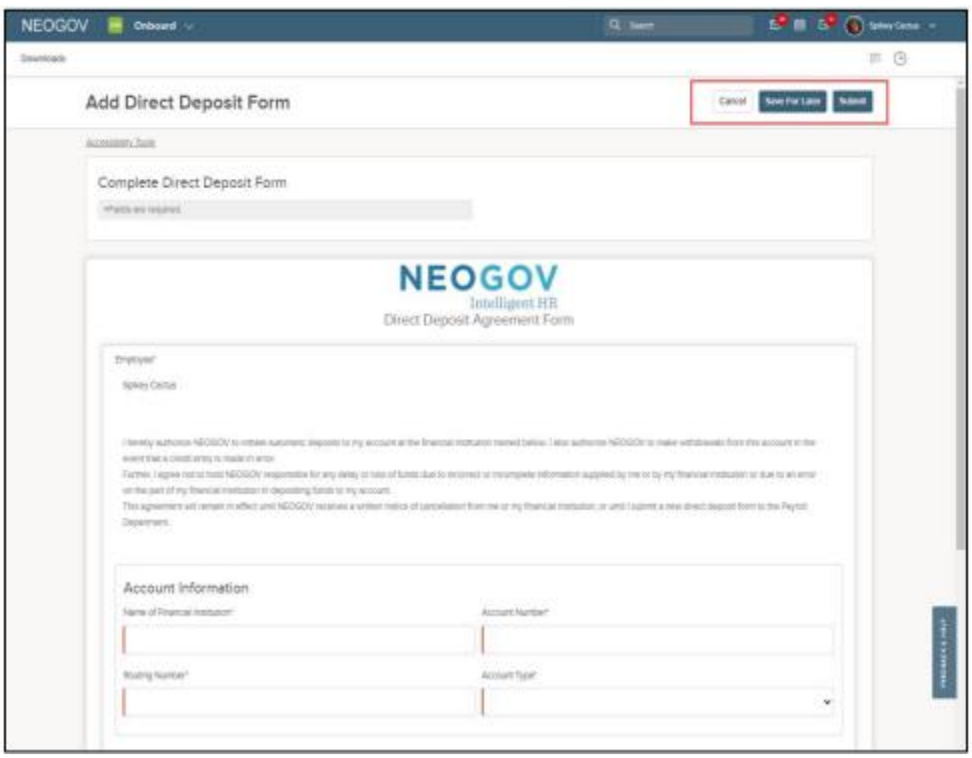


Sometimes, links may be provided with manual tasks. Clicking on a link will direct you to a site outside of NEOGOV Onboard. Complete the task as you would any other manual task.

Video Task

Video tasks pull videos from YouTube or Vimeo. Notice that to complete a video task, you must finish watching the provided video

Form Task



Form tasks allow you to complete forms electronically. Required fields (i.e. questions) will be marked in red. Form actions will remain at the top of the page as you complete the fields:

- Select **Cancel** to return to the previous screen

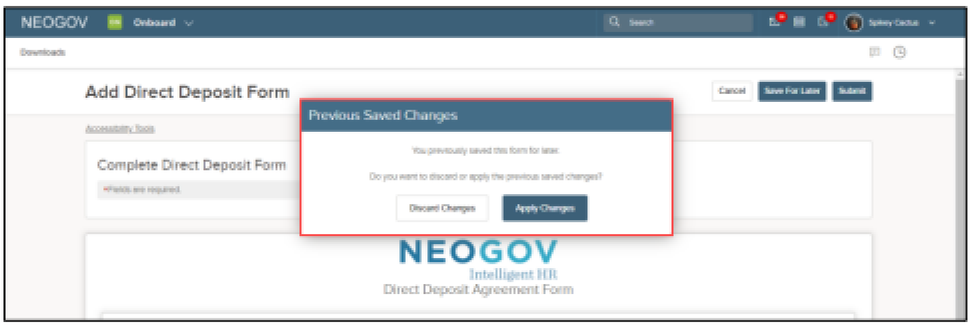
● Select **Save for Later** to save the form while in progress. If a form is saved for later, you will be able to return to the form later to complete and submit. Fields marked as required do not need to be completed to save the form for later. Selecting **Save for Later** does not complete the form task.

● Select **Submit** to complete the form

Keep in mind that when forms are complete, they are **locked**. To make updates to a completed form, contact your HR administrator and ask for the relevant forms to be **unlocked**.

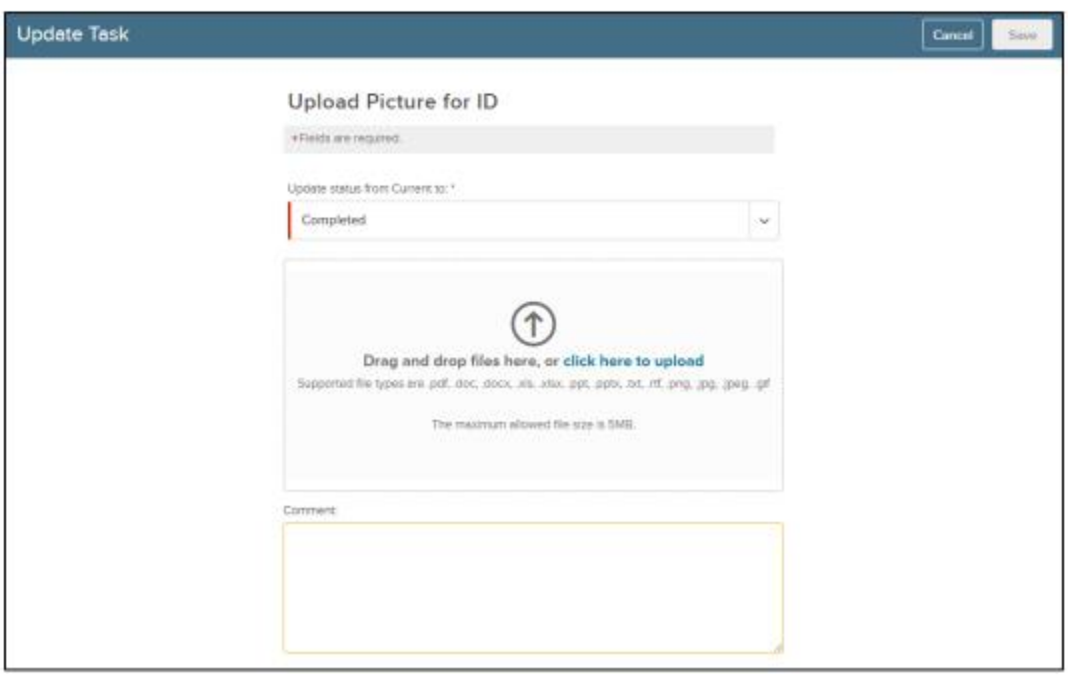
Resume Completing a Form

Selecting the **Save for Later** option when completing a form task creates a temporary save of the form. This form task can be resumed later via the checklist widget on the portal.



Select **Discard Changes** if you would like to start fresh with a blank form. Select **Apply Changes** to have your previously saved changes restored.

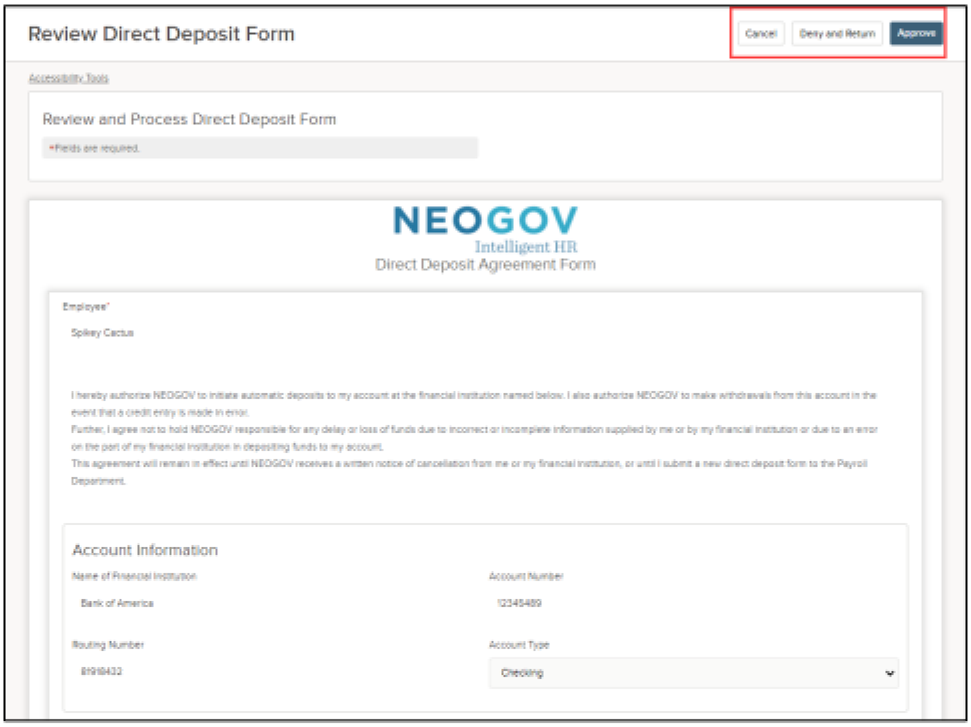
Attachment Task



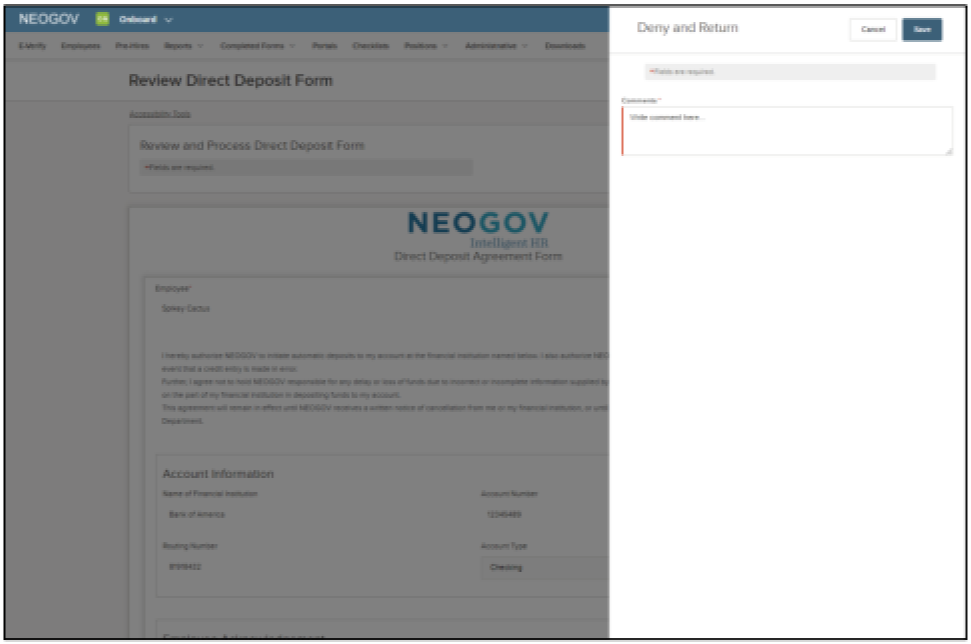
To complete an attachment task, you are required to upload at least one attachment. Drag and drop files into the upload area or click into the upload area to browse your local files for an attachment. The maximum file size allowed is 5MB.

Review Task

Review tasks require the task assignee to review the contents of a form. The task assignee views the form in read-only mode and cannot make changes to the contents of the form. When previewing a form as part of a Review task, signatures are displayed and files that were uploaded to the form may be downloaded as well. This task type is not commonly assigned to new hires but may be assigned to managers or other administrative staff.



All actions are located at the top of the page. Choose to either a) **cancel** and exit the form, b) **deny and return** the form, or c) **approve** the form.

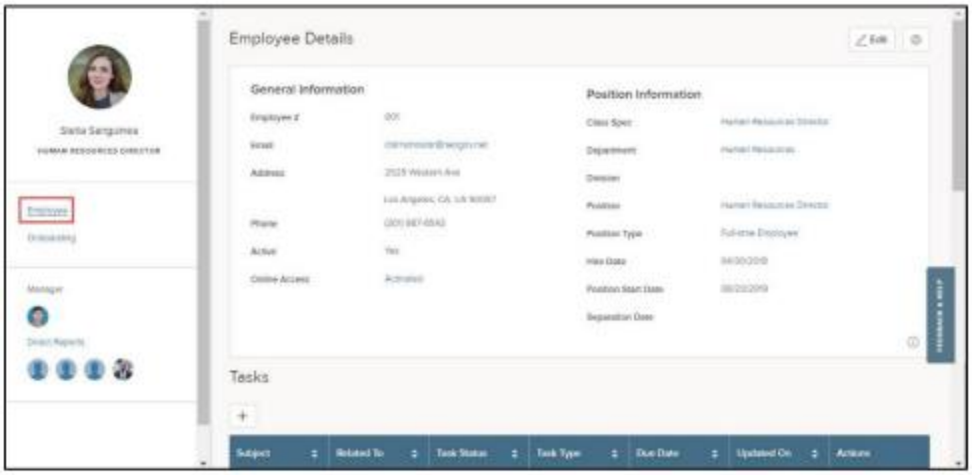


If you choose to **deny and return** the form, you will be required to include comments to explain the denial. A denied form is returned to the original form task assignee who will be able to review the comments and adjust accordingly

Employee Details

The **Employee Details** page displays all employee information, tasks, notes and attachments, and forms tied to the employee record. This page acts as an employee profile. Onboard users can access their own Employee Details page to view their own information.

Managers and other staff who help facilitate the onboard process have access to the employee details pages of other employees in the system. Managers are restricted to the employee details pages of employees within their reporting hierarchy (e.g., their direct reports). IT and HR users may either be allowed to view all employees or be restricted to certain departments. These restrictions are called **scopes**.

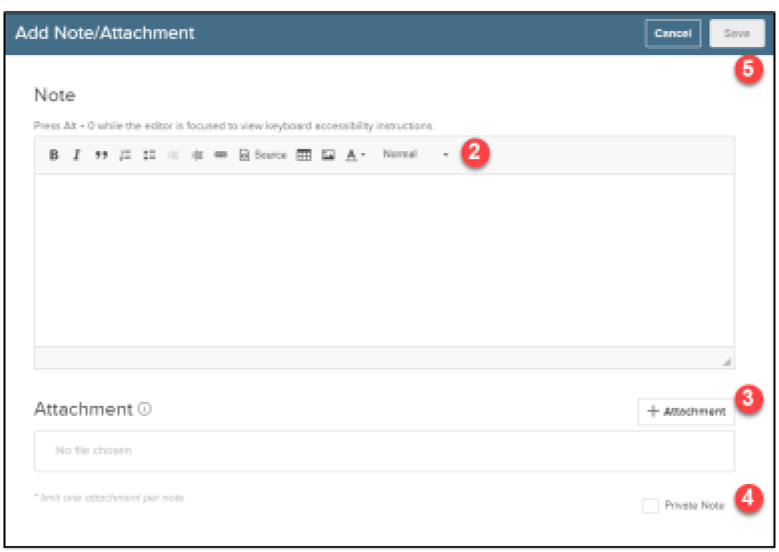


Select the **Employee** option on the left-hand sidebar to access the Employee Details page

Notes and Attachments

Scroll down to access the **Notes and Attachments** section of the employee details page

1. Click the '+' icon to add a note or attachment



2. Use the rich text editor to type a **Note**

3. Click + **Attachment** to add an attachment. Browse your local files and upload the desired file.

4. Click the **Private Note** toggle to ensure that only you and HR can see the note

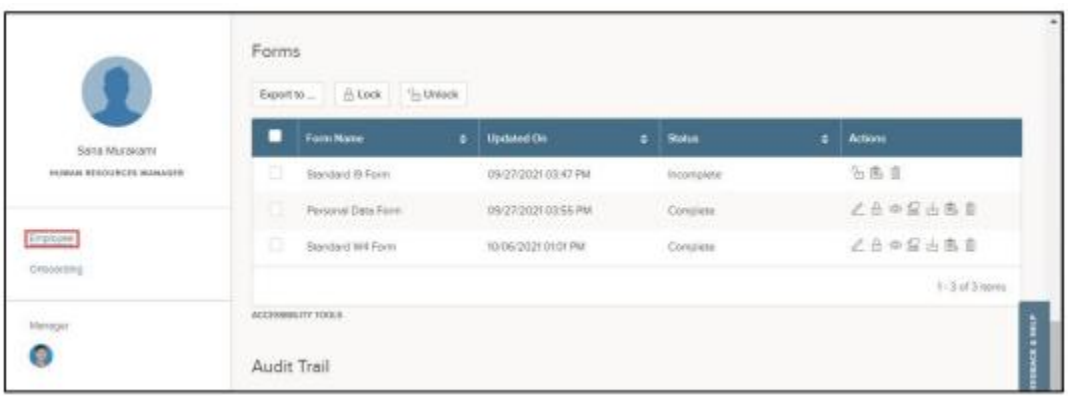
5. Select **Save** to save the note and/or attachment to the employee profile

Select any of the icons under the actions column to take an action on an available note and/or attachment. Click the **pencil** icon to edit, the **trashcan** icon to delete, and the **paperclip** icon to download the note and/or attachment.

Documents uploaded via Attachment tasks may also be accessed via the Notes and Attachments section of the employee details page.

Managing Forms

Employees can access their forms from the **Forms** section of their employee profile. A list of the Complete, In Progress, Pending, and Cancelled forms are available to review, along with potential actions.



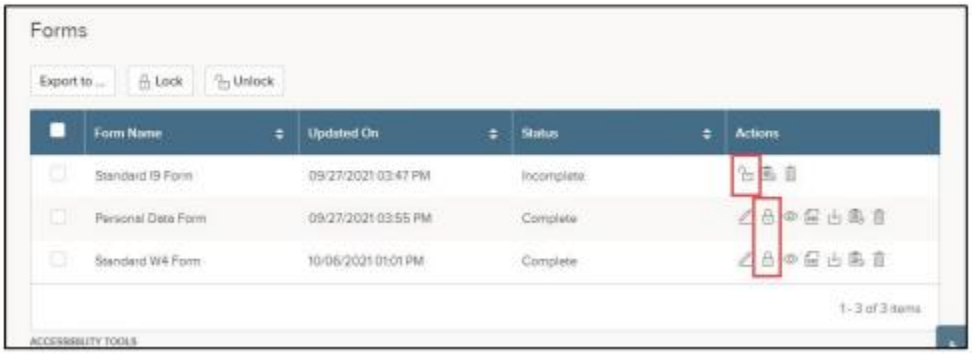
First navigate to the **Employee Details Page** (i.e., the employee record) and scroll down the **Forms** section. From here, you can view the following:

• the form name

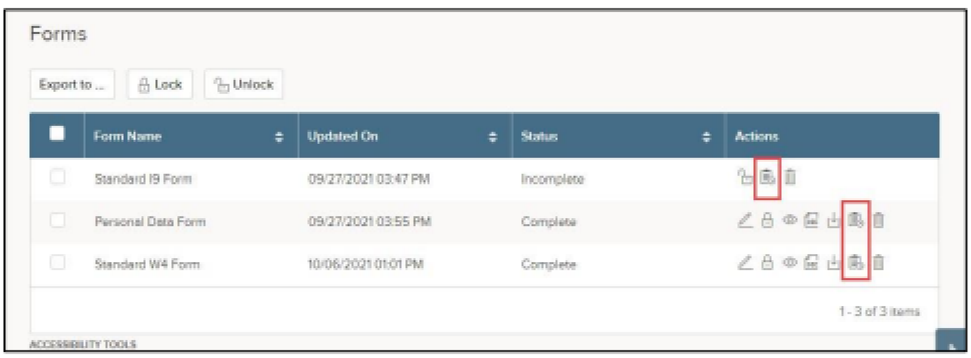
• the date and time a form was last updated

• the status of a form

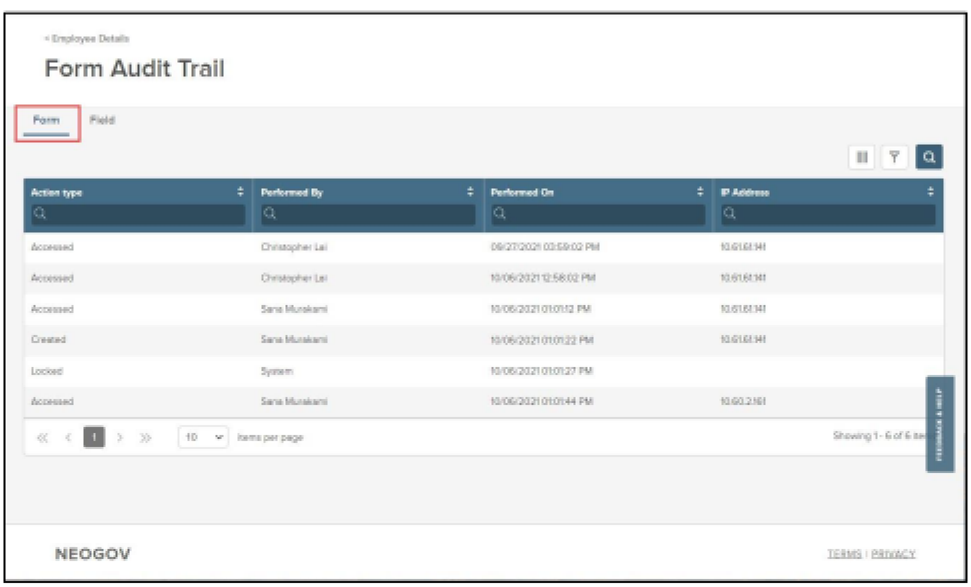
• the actions column, which allows you to take a variety of actions on forms



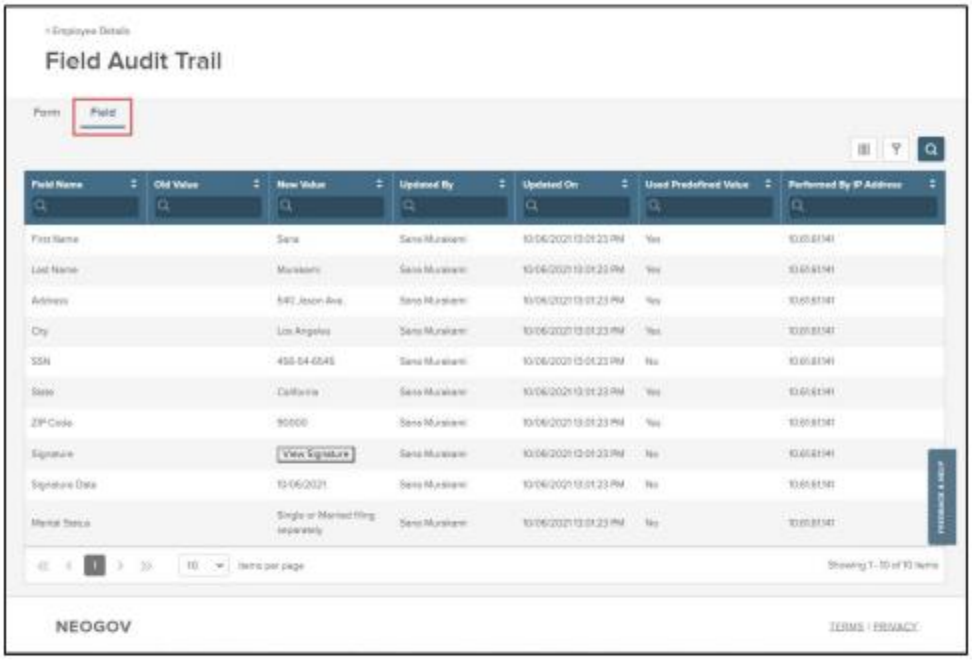
The **lock** icon indicates whether a form is currently locked or unlocked. Forms automatically lock when the status of the form is "complete". When employees want to make edits to a completed form, they must notify the HR Admins to unlock the form. For federal compliance purposes, NEOGOV Onboard locks an Employee's Standard I-9 form by the end of their Start Date. After the employee's fourth day, the system locks the form for all users in the system and no edits are made unless an HR Admin unlocks the form.



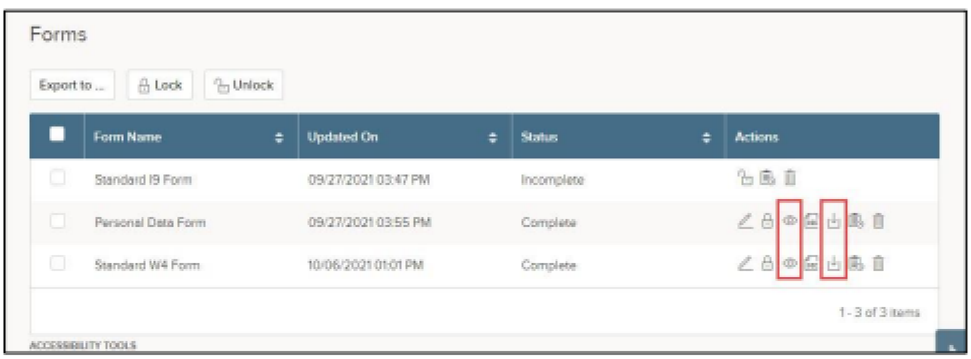
Click on the **form audit trail** icon to view an audit trail of the corresponding form



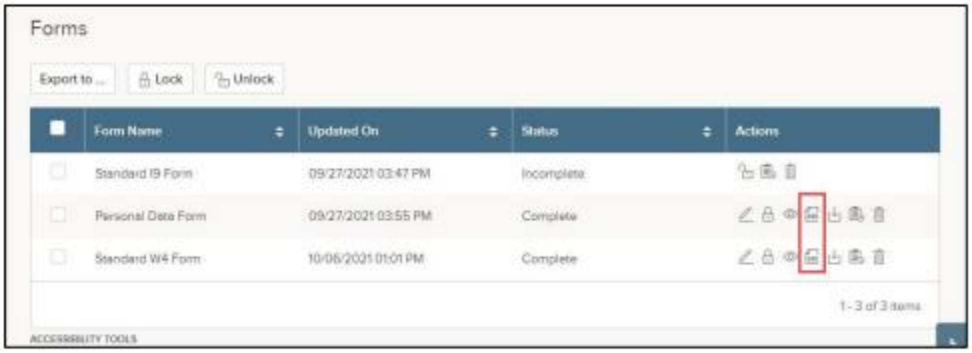
Select **Field** to view any changes that were made to the fields on a form. You can view when a field was updated, the new value, the old value, who made the update, when the update was made, and the more.



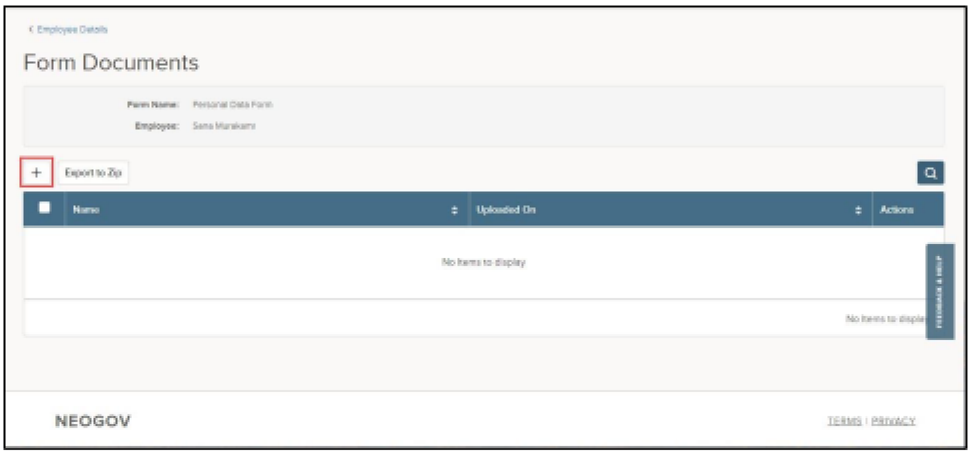
Select **Form** to view any changes that were made to the form itself such as when the form was created, when it was accessed, and when the form locked.



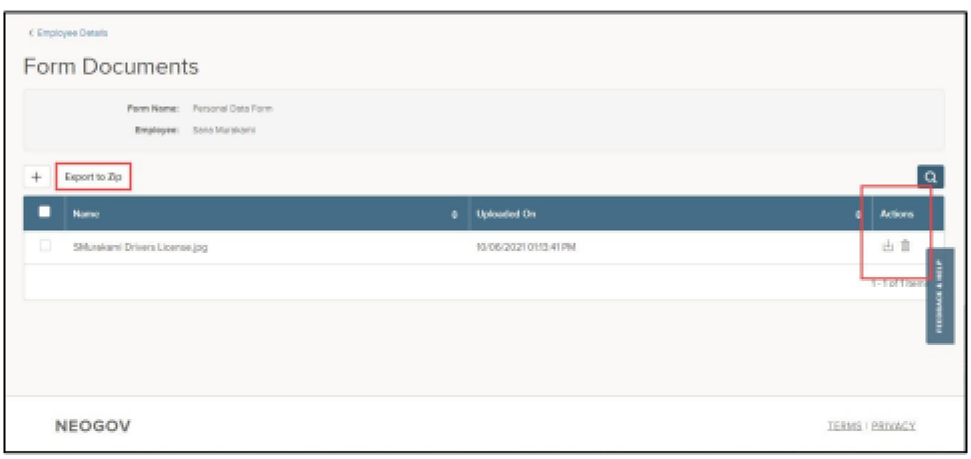
Returning to the forms section of the employee profile, notice the **preview** and **download** icons. These icons allow you to preview the form in your browser and download a PDF of the completed form.



Documents can be attached to forms. If forms contain attachment field(s) and if documents are attached to those fields, they can be viewed here as well.



Select the '+' icon to add a document to a form. Note, this option is only available if the form is unlocked, and you have permission to update the form. You may need to contact HR for more info.



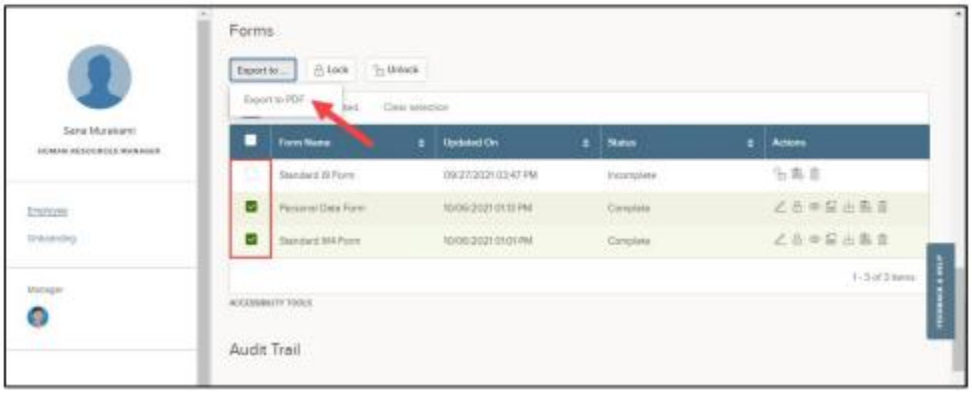
There are two ways to download form documents from this page.

- Click **Export to ZIP** to export documents in bulk into a ZIP file
    - o Select the toggle next to the desired forms before taking the export action

• Click the **download** icon to download individual form documents

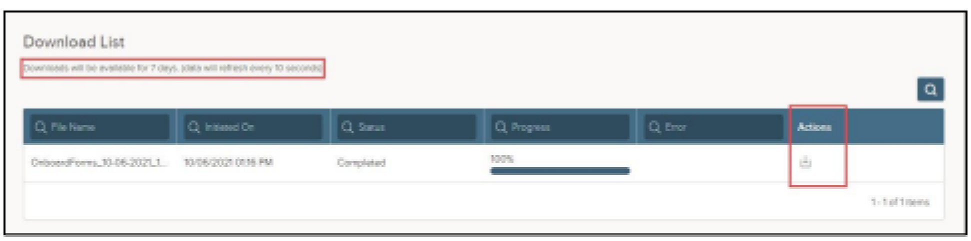
Bulk Export Forms

If you have the need to export multiple forms out of the system and into PDF format, you can use the Bulk Export option located in the Forms Section of the Employee Details Page.



Select the forms you would like to export using the toggles. Then, select **Export To...** and **Export to PDF** to trigger a document export job.

A banner message notifies you that a document export has started. You can visit the **Downloads** page by clicking the link in the banner message or by clicking the downloads option in the navigation bar.



• Document export jobs will be displayed on the **download list** for 7 days. Use the downloads list to track the progress of export jobs you initiated.

• Use the **download** icon in the actions column to download the relevant files. Exports will be downloaded in a ZIP file format. Individual forms will be in PDF format.