PageUp Talent Management Training



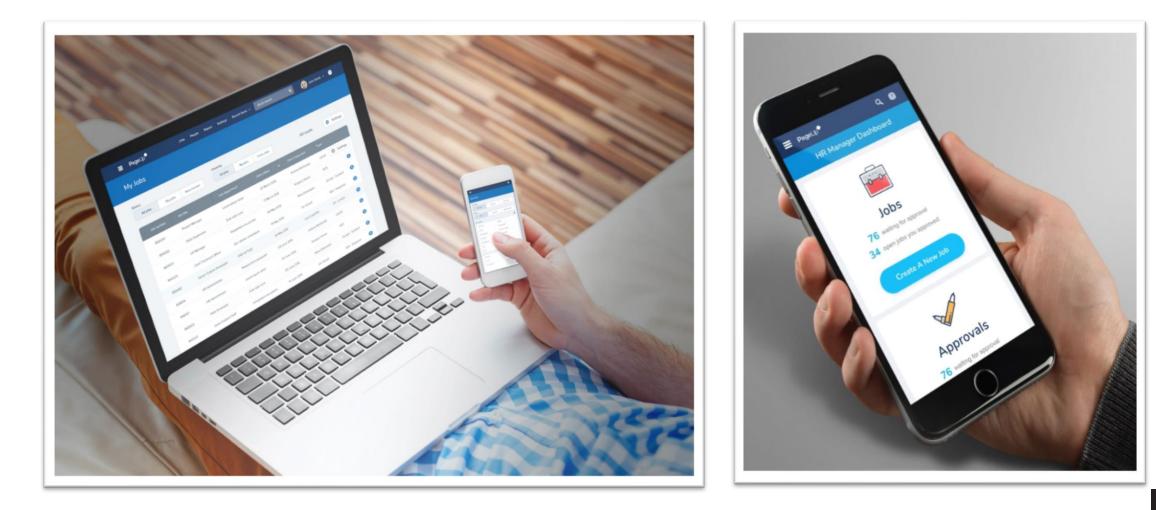


PageUp Overview

- PageUp provides an enhanced candidate experience at every step of the recruitment cycle, from application to onboarding.
- PageUp provides following advantages:
 - Branded applicant experience
 - Integrated communications tools
 - Optional interview scheduling tool
 - Offers can be initiated and tracked
 - Eliminates need for paper
 - Robust metrics & analytics
 - Standardized and centralized employee onboarding
 - Provides oversight into the numerous organizational units and empowers teams to organize and track their recruitment process
 - Improved data integrity



Available Across All Devices





Implementation Details

- PageUp will go live for users on April 26, 2019
- PageUp go live for applicants on May 3, 2019
- Wrap up searches in PeopleAdmin by June 6, 2019
- The pay groups using PageUp at go live are:
 - USPS
 - A&P
 - Faculty
 - OPS Phase 1
 - Hourly Non-Student Advertised
 - Post Doctoral
 - Medical Residents
 - Standardized Patients





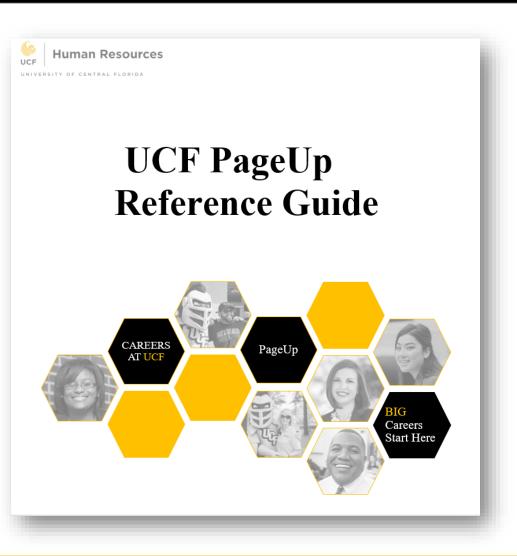
Training Objectives

- General Navigation
- Job Card Posting Positions
- Managing Jobs & Managing Applications
- PageUp Functions
- Applicant Experience
- Offers
- New Hire Experience
- Manage Employee Onboarding Tasks
- Understand the Electronic Onboarding Process
- Know how to Monitor Status of Employee Onboarding Tasks
- Navigate and Complete Tasks as the Onboarding Delegate
- Know How and When to Submit a New Hire ePAF



Reference Tools

- Comprehensive Training
 Guide
- Guidance tools on the PageUp dashboard
- Resources available online
 at: <u>https://hr.ucf.edu/liaisons-</u>
 and-managers/new-talent aquisition-system/





JOBS AT UGE

PROFESSIONAL CAREERS + TEACHING AND RESEARCH OPPORTUNITIES IN ORLANDO

WWW.UCF.EDU/JOBS



Careers **Portal**



S CAKEEKS AT U	Gł	JOB SEARCH	Search a Job Title or Locatio
♥ REFINE YOUR SEARCH		Be	a Part o
Administrative & Professional	109	150	methind
Faculty	34	TACK AN	ed a great time to start a career
OPS (Temporary)	19	better pl	ace is a big job. It requires a big
USPS (Staff)	0		e need you. We are laser focuse nal and diverse faculty, studer
LOCATIONS			tions strengthen us. Sound like ly for a career with the second
🗌 Main Campus (Orlando)	156		re bigger is better.
🗌 Main Off Campus	8		
UCF at Celebration	0		
UCF at Chiefland	0	JOIN TI	HE UCF TALEN
UCF at Heathrow	0		
UCF at Sumterville	2	Computer Sup	oport
UCF Downtown	0		o be a part of the Knight Natio
UCF HSC at Lake Nona	3		ortunities don't align with your ch through our Talent Network
UCF Rosen Col - Universal Blvd	0	Senior Ground	lskeepers
UCF Sanford/Lake Mary	0		e & Natural Resources departm
UCF South Lake	0		ng candidates interested in up r Groundskeepers.
UCF Valencia West	0		17
CATEGORIES		Law Enforcem	
Academic Advising/Support	0	UCF Police De	pt is seeking new law enforcer
Administrative/Clerical Support	B	CURRE	NT OPPORTUN
Administrative/Professional	30		
Admissions/Financial Aid/Enrollment	6	POSITION	
Advancement	2		

0

12

6

2

S UNIVERSITY OF CENTRAL FLORIDA

Arts & Humanities

Business Administration

Communications/Public

Relations/Marketing

Construction/Planning



Search UCF

Q

LOGIN

0

UCF SIGN IN +

es a big University and we cannot do it ser focused on attracting and cultivating lty, students and staff whose collective Sound like you? Then take the next step e second largest public university in the

ALENT NETWORK

night Nation's tech community! If our current with your employment goals, we would love nt Network.

es department at the University of Central rested in upcoming opportunities to join our

w enforcement officers.

RTUNITIES

POSITION	LOCATION	CLOSES	
Accountant II	Main Campus (Orlando)	April 5, 2019	

This position will be part of the university's general accounting team and will primarily be responsible for managing accounting information and transactions for several university direct support organizations (DSO). The successful candidate will have an interactive nature; ability to multi-task; تطويمهم مستباحه مسواها معتم امسم المعتقديات



GENERAL NAVIGATION



New Terms

- Job Card
 - Requisition used to post a single or pool posting.
- Dashboard
 - Home page containing task tiles for various functions in the system
- Offer Card
 - Contains hire documents, offer/welcome letter and position and salary details
- Talent Network
 - Section of the careers portal where talent pipeline pools can be posted
- Posting Introductory Sentence
 - Preview sentence(s) viewable to the applicants on the careers portal prior to selecting posting



User Types

Hiring Manager

- Access to submit a job card (requisition) and hiring documents to Staffing Coordinator
- Ability to update applicant status

Staffing Coordinator (HR Liaison)

- Ability to submit a job card and hiring documents
- Ability to edit a job card and hiring documents
- Ability to approve or decline a job card or hiring documents
- Ability to update applicant status

Executive Approver

- Access to view a job card and hiring documents
- Ability to approve or decline a job card or hiring documents
- Search Committee & Additional Viewers (aka Guest users)
 - Access to view applicants
 - Ability to provide feedback/responses
 - Access to view job
 - Search Chair has ability to view committee responses





Access the PageUp System To access the PageUp System, click on

ucf.pageuppeople.com

NID	You are logging into:	
NID	https://admin.dc4.pageup	people.com/
Password		
Password	What is my NID?	0
Sign on	NID Password Reset	ø
	Trouble Signing On?	Ø

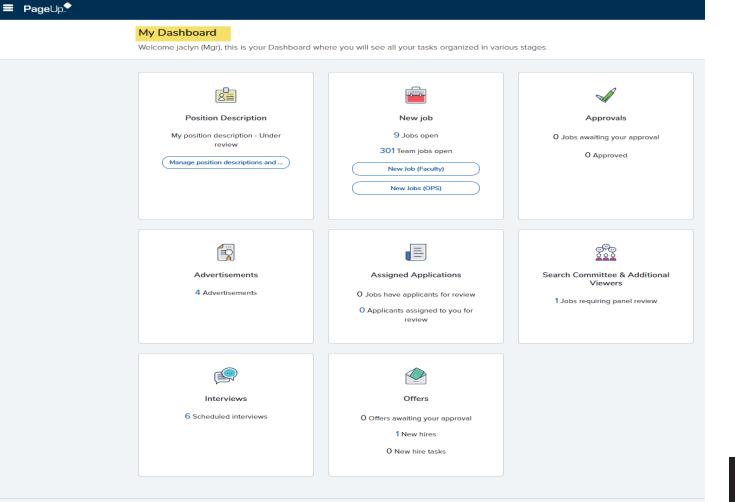


My Dashboard

UCF

UNIVERSITY OF CENTRAL FLORIDA

The homepage display of workflow task tiles based on what functionality a user has permission to access







Task Tiles

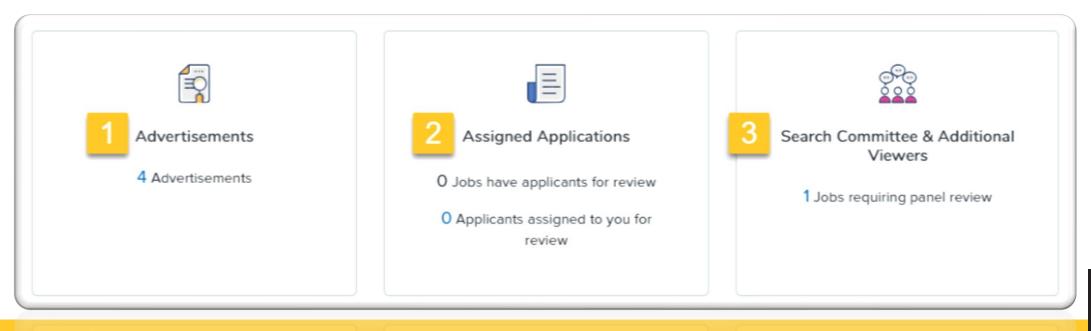
- **1. Position Description** Task Tile allows you to search USPS and A&P positions to create a posting.
- **2. New Job** Task Tile allows you to view the number of jobs open, the number of team jobs open, and create a posting for Faculty and OPS groups.
- **3. Approvals** Task Tile allows you to view the number of jobs awaiting your approval and the number of jobs you have approved.







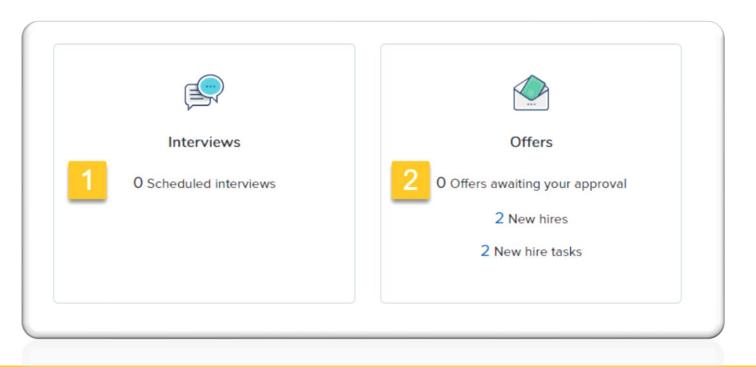
- **1. Advertisements** Task Tile allows you to view a list of your jobs posted on the careers portal.
- **2.** Assigned Applications Task Tile allows you to view the number of jobs and applicants for review that have been assigned to you.
- **3.** Search Committee & Additional Viewers Task Tile allows you to view positions for committees you are serving. *Additional Viewers* is the same as *guest user access*.







- **1. Interview** Task Tile allows you to view the number of scheduled interviews if utilizing the *Events* function in PageUp.
- 2. Offers Task Tile allows you to view the number of offers awaiting your approval. The number of your new hires and the number of your new hire tasks.





Main Menu

The Menu is grouped into subheadings.

It allows the user access to different areas of the system.



Manage Jobs Manage position descriptions ...

Applicants Manage applications Manage reference check requ...

Events New event Manage events

More... Reports

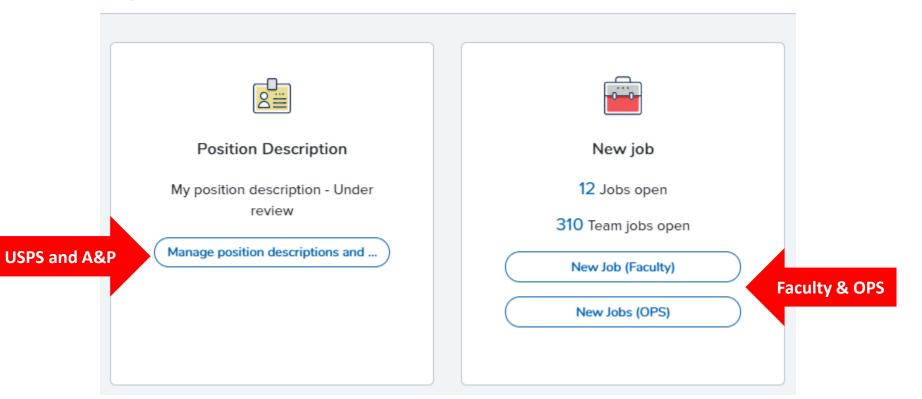


JOB CARD POSTING POSITIONS



Submitting a Job Card (Requisition)

My Dashboard







Job Card can be accessed from multiple locations:

1. The jobs open link on the dashboard





Jobs

Workflows Manage position descriptions ... New Job (Facuity) New Jobs (OPS) Jobs open Advertisements Search Committee & Addition... Assigned applications Interviews My new hires My new hires My new hire tasks



Job Card

Job Card contains the following:

- Position Info tab displays posting information.
 - Job Requisition Number
 - Posting details
- Notes Tab is used to add Position Notes- viewable to all
 - Please remember all notes are subject to public record.
- **Document tab** is used to upload documents relating to the job posting such as: ads, transcripts, exemptions.
- Reports tab allows you to see reports pertaining to the job card.
- Approval workflow approve or decline job card and/or return to originator for revisions.



Job Card- Reporting Capabilities

(492615) HRIS Analyst Senio	or	🛓 View applications 🛛 🛱 Print Actions 🗸
Position info Notes Documents	Reports	
EEO Departmental Report	Scheduled Interview Report	Time to Fill
Jaclyn Velez	PageUp Administrator	Jamie Makowski
5 months ago	9 months ago	5 months ago





Job Card- Metrics & Analytics





VIDEO DEMONSTRATION Creating a Job Card



Key Takeaways

Job Card

- Job summary allows you to edit and personalize the job posting
- Allows you to post a single or pool positions
- Search committee section allows you to assign a chair and committee members
- Positions will be posted by system generated requisition number
- Recruitment process must be selected on the job card prior to submission



MANAGING JOBS AND MANAGING APPLICATIONS



Managing Applications

There are multiple ways to view any job posting:

- From the *Job Card*, click the *View Applications* button on the upper left hand side.
- From the *Manage Jobs* screen, click the <u>number</u> listed in the applications column.
- From the *Manage Jobs* screen, click the *Applications* icon (blue person located on the far right).
- From the Main Menu, click the Manage Applications link.

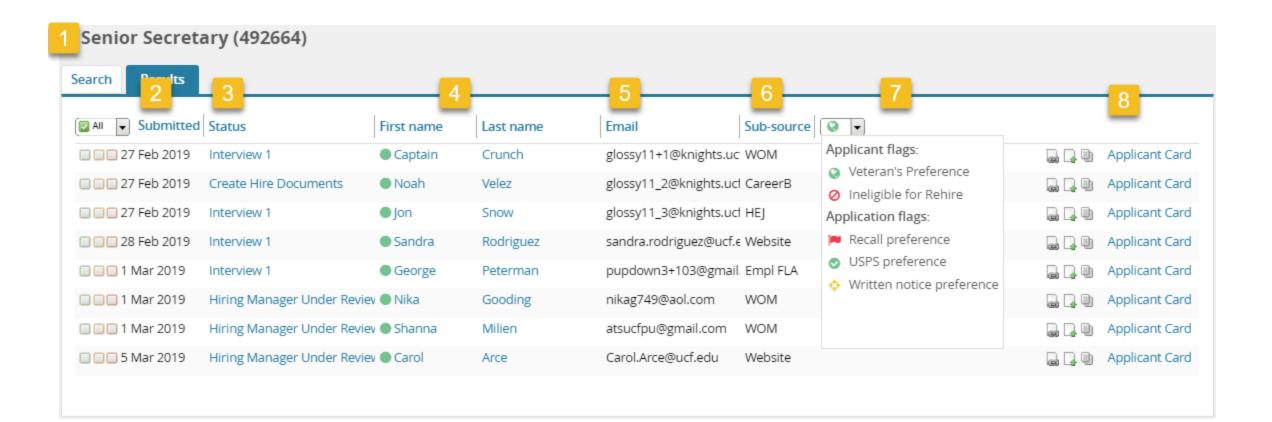


Managing Applications

= Pa	ı ge Up.								Jobs
	Му	/ Das	shboard						
Manag	ge jobs								
Status:	All		•	Clea	ar Search				
Types:	All 🔻								
Show	v other search	criteri	ia						
Job No.	Date created	User	Title			Area	Department	Status	Applications
492620	18 Dec 2018	JM	O Computer Sp	pecialist		ADMIN & FINANCE-BUSINESS SVCS	BS SV-AUX OPERATIONS	Offer	б
492619	17 Dec 2018	JC	O Appl Syst And	aly Progra	ammer	AA-College of Graduate Studies	GR STDY-PAYROLL	Approve	7
492616	7 Dec 2018	JM	HRIS Analyst	Senior		ADMIN & FINANCE-HUMAN RESOURC	E HM RES-PAYROLL	Approve	1



Managing Applications





Change Applicant Status

Application statuses can be changed individually or using bulk actions. Do not use bulk actions for creating documents. Certain applicant statuses will send an email notification to the applicant through the Talent Management system. Most emails can be edited before sending.

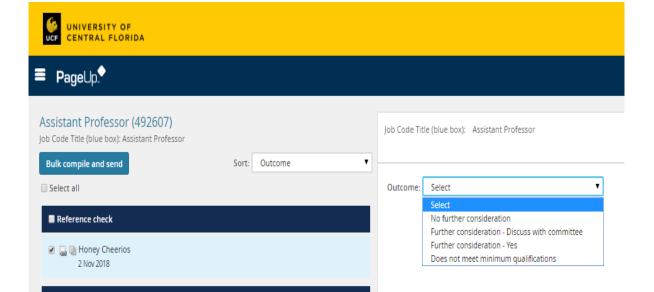
NOTE: The PageUp bulk actions functions are extremely powerful and need to be used responsibly. Incorrect use of bulk actions can lead to large numbers of applicants being sent incorrect information.



Search Committee Panel Features

My	panel	jobs
		,

My panel jobs							
Job number	Date added	Status	Job title	User	Total applications	Your role	
264883	24 Oct 2006	Approved	Talent Manager	DA	20	Chairperson	View Applicants View responses Edit job
517349	11 Dec 2008	Approved	Faculty Administrator	CL	1	Panel member	View Applicants View job



Outcome Responses

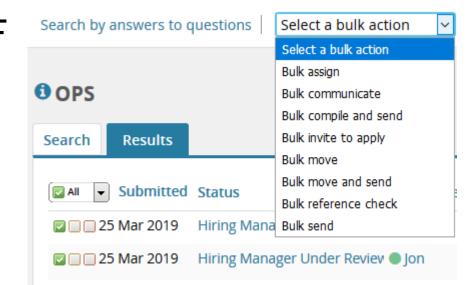
- No further consideration
- Further consideration **Discuss with committee**
- Further consideration Yes
- Does not meet minimum qualifications



Bulk Actions

Bulk Actions make it easy to complete actions for multiple applicants at once such as:

- Status Updates
- Compiling documents into a PDF
- Communications
- Scheduling Interviews
- References





Bulk Actions

- **Bulk Assign**: Used to assign application to any other user in the system for review. The assigned user can review the application with the option to approve or decline the applicant.
- Bulk Communicate: Used for communication with the applicants.
- Bulk Compile and Send: Used to compile documents of selected applicants into a single PDF.
- Bulk Invite to Apply: This function allows users to invite existing applicants to apply for a different job.
- Bulk Move: Used to change the application status of multiple applicants at once.
- Bulk Move and Send: Used to change the application status of multiple applicants at once and send application materials to another user in a single email.
- Bulk Reference Check: Rather than using the application status to trigger reference letter checks, use this option to Bulk Refence Check. The ability to modify the email is one benefit of using bulk reference check over using application status.
- **Bulk Send**: Used to send application materials to another user as a separate attachment. Each application and document for each applicant will be sent as a separate attachment.



Confirm Status Changes

After requesting an action, the *Confirm Status Change* screen will appear. It will be denoted by a symbol.

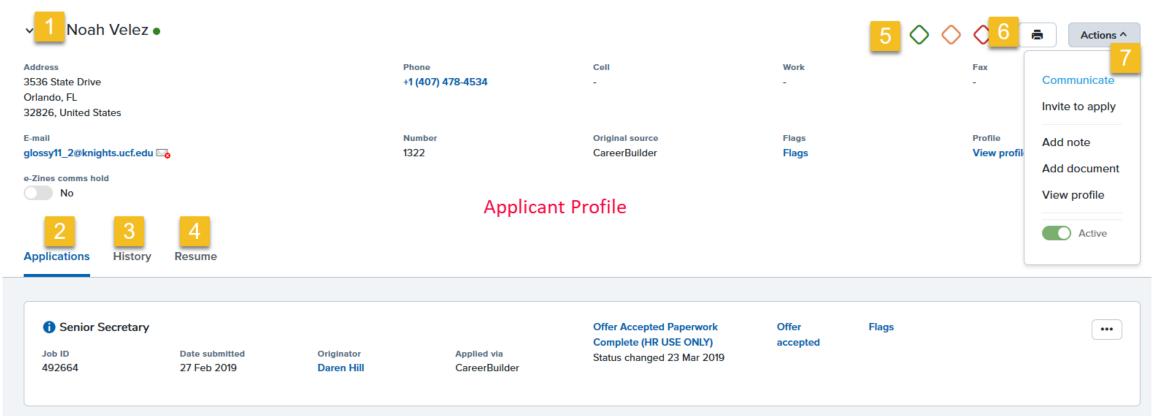
 The screen also provides options, including communications for applicants and communications to users. The options differ depending on the action being performed.





Applicant Card

The Applicant Card displays a full history of the applicant, including the following information:



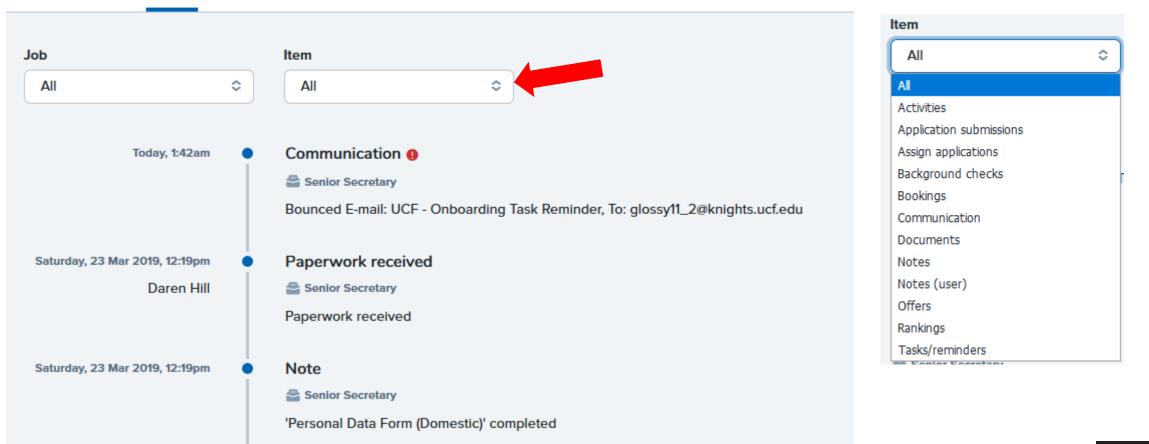


Applicant Card



Applications

History Resume





Applicant Card

		4
Applications	History	Resume

Fred Stone- Test Resume.docx

Fred Stone 3536 State Drive Orlando, FL 32826 (407) 478-4534 (home) E-mail: <u>PUPDOWN3@gmail.com</u>

Objective

To obtain a Human Resources/Personnel Relations Coordinator position within the Recruitment Department at the University of Central Florida that will enable me to utilize my skills and provide an opportunity for professional development and career growth.

Profile

Il Self-starter and highly motivated with the ability to work in a fast paced environment.



VIDEO DEMONSTRATION Managing Applications



Key Takeaways

- Can move applicants individually or collectively into different recruitment statuses.
- Compile and send application and forms into a PDF document.
- Edit and send email communication to applicants.
- View applicant history.
- Ability to collect search committee responses for first round deliberations.



5 Minute Break



PAGEUP FUNCTIONS



Create an Appointment/Event

Booking an event allows users to manage and invite applicants to interviews or phone screening calls.

The user sets up time slots and invites applicants to book a preferred time. These events can be entered into users' Outlook calendar.



- 1. Title: Type in a title for your event, for example: Phone screen for Job No# or Interview for Job No#.
- 2. Event type: Select from drop down menu.

Event details		
Title:*		
Event type:*	Select 🔻	
	Select	
	Interview 1	
	Interview 2	
	Interview 3	
	Phone Screen	



VIDEO DEMONSTRATION Creating and Managing Events



Key Takeaways

- Optional function to electronically schedule events/interviews
- Option to save appointment to your outlook calendar.
- Ability to view events, view bookings to events, search for events, edit events, delete events, and delete bookings.
- Provide instructions, map, etc., to interviewees.



References

- There are four (4) types of reference check form options you may select to have the referee complete. The types of reference check forms are:
 - A&P Reference Questionnaire
 - Faculty Reference Questionnaire Offers option to upload letter of recommendation/reference in addition to answering questionnaire
 - Letter of Recommendation/Reference Referee to upload a letter of recommendation/reference instead of answering questionnaire
 - USPS & OPS Reference Questionnaire

Forms will also be available on the HR website in the A-Z Index.



References

- There are four ways that you can complete reference check requests:
 - **Option 1**: Bulk Reference Check

Use Option 1 if you would like to:

- Send to one or more applicants.
- Select the type of reference check form to be sent to the referee.
- Set the expiry date or deadline by which the reference check must be completed.
- Customize the communication that is sent to the referee, such as department contact information or guidelines for writing the reference letter.
- Attach a custom department questionnaire to the email. The referee can then complete the custom questionnaire and upload against the reference check form.
- **Option 2:** Send Reference Check form from *Applicant Card*

Use Option 2 if you would like to:

- Send to one applicant.
- Select the type of reference check form to be sent to the referee.
- Set the expiry date or deadline by which the reference check must be completed.
- Customize the communication that is sent to the referee, such as department contact information or guidelines for writing the reference letter.
- Attach a custom department questionnaire to the email. The referee can then complete the custom questionnaire and upload against the reference check form.



References

• Option 3: Change application status to Reference Check Requested

Use Option 3 if no customization is required to the default settings. Default settings are:

- Reference Check Form is based on the position type.
- A&P and Search Committee (A&P) A&P Reference Questionnaire
- USPS, OPS, and Search Committee (USPS) USPS & OPS Reference Questionnaire
- Faculty Faculty Reference Questionnaire
- Expiry date is set to 2 days. You can reinitiate the email request if the expiry date has passed.
- Standard email communication is sent.

• Option 4: Manually call the referee and fill out Reference Form

Use Option 4 if you wish to telephone the referee and ask the questions from the form.

- Reference Check Forms can be found on the HR website (A to Z Index).
- Upload the completed form on the job card (Document tab).



VIDEO DEMONSTRATION Managing References



Key Takeaways

- There are three types of electronic employment reference check forms.
- Option to request letter of recommendation in lieu of reference check form.
- Can send communication of reference request to candidate.
- Ability to view the reference responses in PageUp.
- Can configure reminders for referees to complete the references.



APPLICANT EXPERIENCE



CAREERS AT UCF

V REFINE YOUR SEARCH

WORK TYPE

Administrative & Professional	
Faculty	
OPS (Temporary)	
USPS (Staff)	

CATEGORIES

Academic Advising/Support	0
Administrative/Clerical Support	13
Administrative/Professional	30
Admissions/Financial Aid/Enrollment	6
Advancement	2
🗌 Arts & Humanities	0
Business Administration	12
Communications/Public Relations/Marketing	6
Construction/Planning	2
Customer Service	0



UCF SIGN IN +

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Search UCF

🐱 SEND ME JOBS LIKE THESE

JOIN THE UCF TALENT NETWORK

UNIVERSITY OF CENTRAL FLORIDA

Computer Support

We want you to be a part of the Knight Nation's tech community! If our current technical opportunities don't align with your employment goals, we would love to keep in touch through our Talent Network.

WWW.UCF.EDU/JOBS



CAREERS AT UCF

Being Big Attracts the Best. Let's Get Started.

At UCF, we believe success can only happen when we expand opportunity and demand excellence. We believe if there's a better way, we should do it.

Applicant Portal



Inviting Candidates to an Event

Being Big Attracts the Best. Let's Get Started.

At UCF, we believe success can only happen when we expand opportunity and demand excellence. We believe if there's a better way, we should do it.

Please fill in all mandatory fields marked with an asterisk (*).

EVENT BOOKING - SELECT TIME SLOT

Event Interview 1 type: Asst Payroll Event: Manager 492663

Please select a time slot*

	DATE	START TIME	END TIME	VENUE	ADDRESS
0	25 March 2019	2:00pm	3:00pm	INNOVATIVE CENTER	3280 PROGRESS DR., ORLANDO, 32826 Florida United States
0	27 March 2019	9:00am	10:00am	INNOVATIVE CENTER	3280 PROGRESS DR., ORLANDO, 32826 Florida United States
0	27 March 2019	2:00pm	3:00pm	INNOVATIVE CENTER	3280 PROGRESS DR., ORLANDO, 32826 Florida United States

CONFIRM BOOKING DECLINE



Applicant Booking Experience

CAREERS AT UCF Being Big Attracts the Best. Let's Get

Started. At UCF, we believe success can only happen when we expand opportunity and demand excellence. We believe if there's a better way, we should do it.

S UNIVERSITY OF CENTRAL FLORIDA

Welcome Kelly

You have been requested to attend a interview 1 for your Assistant Payroll Manager application. Make an appointment

2

Just so we can get to know you better, we'd like for you to tell us more about yourself.

So that we can understand where you'd really make a difference, every little bit of information you add counts! And of course - you can always provide us your resume.

UCF SIGN IN +

Search UCF

Q

View Current Openings

INCOMPLETE APPLICATIONS

You have no incomplete applications.

SUBMITTED APPLICATIONS

Please note that offer documents can be retrieved from within the "view application" link of the job

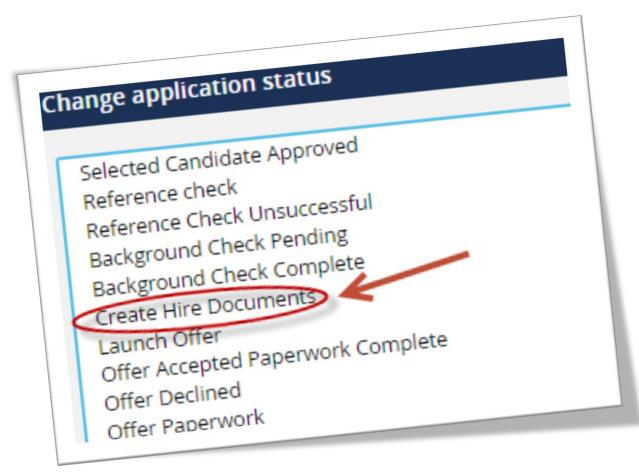


HOME EDIT PROFILE UPDATE RESUMÉ ACCOUNT

OFFERS



Submit Offer Card for Approval







The *Offer Card* contains all of the information needed to complete a hire such as:

- Personal details
- Job details
- Offer details
- Offer documents
- Application documents
- Approval process





Offer Documents

1. Click *Merge document* and select an Offer/Welcome letter or agreement to send to candidate from document library.



- 2. You can also click Add document to upload, such as addenda or agreements.
- 3. Pop up message may appear, click **ok**.

* Faculty positions will utilize Welcome Letters and upload the contract.



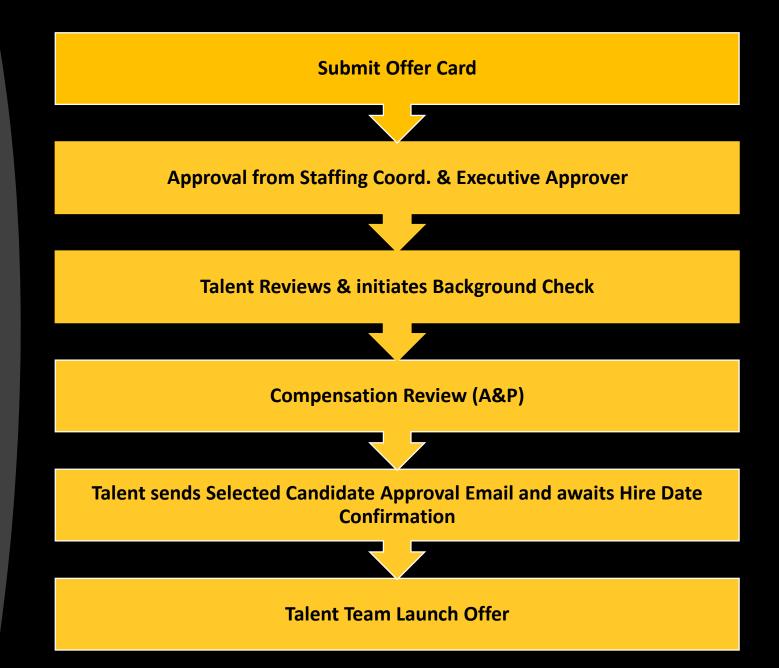
Background Process

- PageUp Integration with Truescreen Inc. for Background Check
 - Automated background check status updates
 - Automated email communications
- Contingent Offers
 - Candidates will not be able to start until the background check has cleared

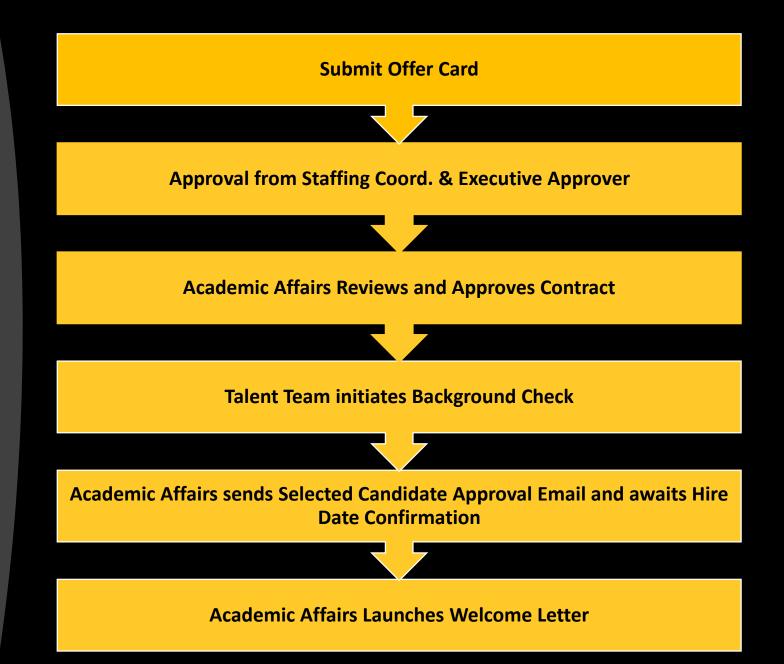
NOTE: *Background check complete* status does not mean *cleared*. Hiring packet must be approved by Talent BEFORE the offer can be approved.



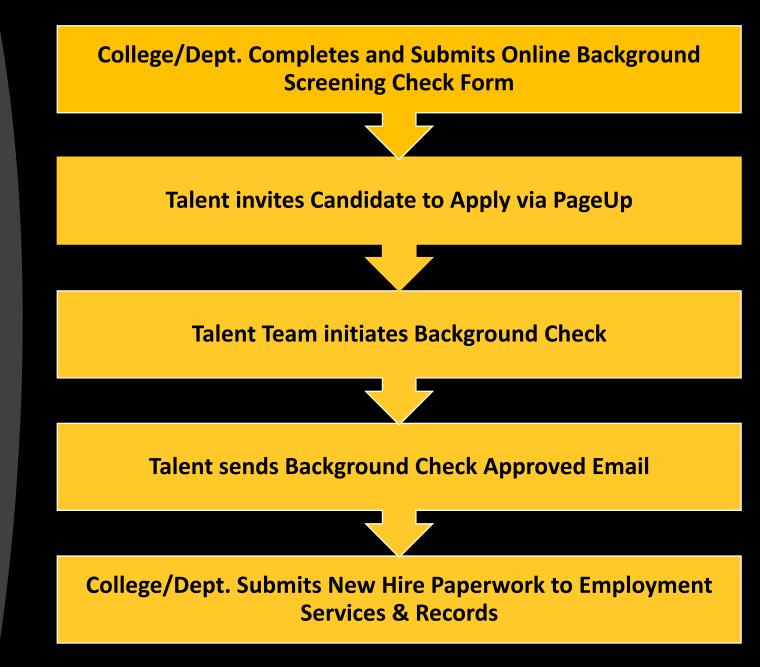
A&P/ USPS/OPS Advertised Workflow



Faculty Workflow



OPS Workflow



Online Background Check Form

- Online replacement for Affirmation Form
- Link will be located on the HR website under backgrounds on 4/26/19

Suniversity of central florida
Human Resources Talent Acquisition Department
Background Screening Request
Adjunct Faculty
Graduate Assistantship
Graduate Hourly
Medical Resident
Non-Student Hourly
Post Doctoral
Standardized Patients
Undergraduate Student Houriy
Youth Program UCF Employee



Offer Acceptance

- How will you know if candidate accepts?
 - Receive an email notification
 - Review History on Applicant Card

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E-ma	il:	pupdown3+74@gmail.com	Numt	ber: 1183		
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Item:	All Date & time Today, 7:43am Jamie (Mgr) Manager	Item Paperwork received Asst Dir Info/Pub Svcs 'UCF New Hire Form (Interr Asst Dir Info/Pub Svcs	iational only)' completed Dffer Accepted Paperwork Complete' on completion of 'UCF New Hire For	m (international only)'		Þ
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Item:	All Date & time Today, 7:43am Jamie (Mgr) Manager Today, 7:43am System Today, 7:43am System Today, 7:40am System Today, 7:40am	Item Paperwork received Asst Dir Info/Pub Svcs 'UCF New Hire Form (Interr Asst Dir Info/Pub Svcs System changed status to ' Asst Dir Info/Pub Svcs E-mail: Offer accepted noti Asst Dir Info/Pub Svcs New hire form: UCF New H Asst Dir Info/Pub Svcs	Dffer Accepted Paperwork Complete' on completion of 'UCF New Hire For fication, To: pupdown3+20@gmail.com;pupdown3+11@gmail.com, From:			View



VIDEO DEMONSTRATION Creating Offer Card



Key Takeaways

Offer card allows you to:

- Create an offer letter/welcome for the selected candidate.
- Select an new employee orientation date.
- Select the appropriate onboarding process.
- Assign the onboarding delegate.
- Attach additional documentation to offer/welcome letter.



10 Minute Break



NEW HIRE EXPERIENCE



Candidate Offer Experience



Welcome Noah

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You have been made an employment offer for your Senior Secretary application.

View Offer

Just so we can get to know you better, we'd like for you to tell us more about yourself.

So that we can understand where you'd really make a difference, every little bit of information you add counts! And of course - you can always provide us your resume.

View Current Openings

INCOMPLETE APPLICATIONS

You have no incomplete applications.

SUBMITTED APPLICATIONS



CAREERS AT UCF ONBOARDING

HOME RELOCATIO

RELOCATION & COMMUNITY RESOURCES

BENEFITS

UCF REGULATIONS AND POLICIES

ICIES TRAINING & SECURITY ACCESS

YOUR GUIDE TO UCF

Welcome to #KnightNation

Congratulations! You worked hard to get here, so now it is time to celebrate your success. We invite you to learn more about how your contributions will help us harness the strength of our size to create a positive, lasting benefit that resonates on a global scale. It's time to walk you through our Knights Welcome Center so you are ready for your first day at UCF. Please make sure your tasks are completed by the deadlines listed. With more than 12,000 staff and faculty representing 36 countries, we are one of Central Florida's largest and most inclusive employers. Welcome to UCF. Get ready to do big things.

WORKING AT UCF HAS BIG PERKS

Congratulations. On behalf of UCF's 13,000+ faculty and staff, we welcome you to UCF. Now is it time to walk you through the Knights Welcome Center so you are ready for your first day at UCF. What's first? Complete the items on the Task List in the right-hand column. We've made it easy to keep track of which items are due before your

KNIGHTS WELCOME CENTER



BEFORE YOUR FIRST DAY

Complete Section 1 of Electronic I-9 Due: 7 Apr 2019

Complete 3- in-1 Form Due: 7 Apr 2019



Video-Employee Onboarding Tasks

contributions will help us harness the strength of our size to create a positive, lasting benefit that resonates on a global scale. It's time to walk you through our Knights Welcome Center so you are ready for your first day at UCF. Please make sure your tasks are completed by the deadlines listed. With more than 12,000 staff and faculty representing 36 countries, we are one of Central Florida's largest and most inclusive employers. Welcome to UCF. Cet ready to do big

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BEFORE YOUR FIRST DAY		
	Complete Section 1 of Electronic I-9	
_	Due: 27 Mar 2019	
	Complete 3- in-1 Form	
	Due: 27 Mar 2019	
	Complete the Loyalty Oath-	
	Rights to Inventions	
	Due: 27 Mar 2019	
	Instructions on Uploading	
	Onboarding Documents	
	Due: 27 Mar 2019	
	Acknowledge Pre-	

YOUR TASK LIST

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Notarized Form or Physical Signature

- Majority of onboarding tasks can be completed electronically with the exception of the Loyalty Oath-Rights to Inventions and SSA-1945 Form.
- Employee will be able to upload those two completed documents to the Knights Welcome Center.
- Specific Task has been created that provides new hire with the information on how to upload the forms.



Key Takeaways

- Seamless transition from offer acceptance to onboarding tasks
- Logic built in the electronic forms
- Correct version of form



ONBOARDING TASKS



New Terms

- Onboarding Delegate
 - Individual within the department responsible for assisting the new hire with completing the onboarding documents
- Alternate Onboarding Delegate
 - Individual who is considered the back-up within the department responsible for assisting the new hire with completing the onboarding documents
- Onboarding Tasks
 - Onboarding documents or tasks that hires or onboarding delegates must complete
- Knights Welcome Center
 - Onboarding Portal where the new hire will view and complete the onboarding tasks



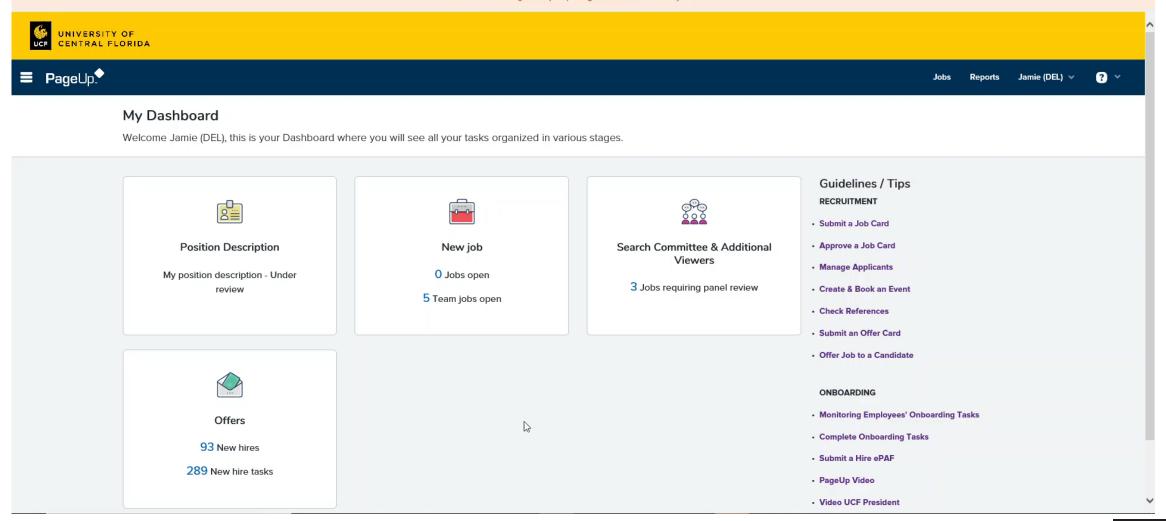
Onboarding Tasks

- Grouping of Onboarding Tasks
- Onboarding Task Reminders
- Tasks Assigned (Employee, Onboarding Delegate, Both)
- Department's Responsibilities
 - Monitor the status of employee onboarding tasks via PageUp. Followup with the employee if they are not completed.
 - Complete the onboarding tasks specific to onboarding delegate (i.e., I-9, Submit Hire ePAF, etc..).



Video-Status of Employees' Tasks

You are controlling Jamie (DEL) Delegate's account. Return to your account





Status Key

- Open
 - Task that has not been completed but is not overdue
- Completed
 - Task that has been completed
- Overdue
 - Task that has not been completed and is overdue



Key Takeaways

- Visual Display of status of Tasks/Forms Completed
- Verify the tasks have been completed. Review the information. Follow-up as needed.



ADDITIONAL FEATURES



Video-Add Additional Tasks

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		You are controlling Jamie (DEL) Dele	egate's account. Return to your account			
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PageUp.				JC	obs Reports Jamie	e (DEL) 🗸 🥐
	New hire tasks					
	Samuel Hendrick Position Project Manager	Assigned to All tasks Supervisor/Delegate	Employee		Add new task	
	Start date 28 Mar 2019	Task	Assigned to	Due date	Status	
	Notify updates	Before Your First Day			OAdd	
	Add optional tasks	Verify Employee Completed Onboarding Tasks	Jamie (DEL) Delegate	25 Mar 2019	Overdue	
	No tasks	Submit Hire ePAF	Jamie (DEL) Delegate	25 Mar 2019	Overdue	
	My Favorite Tasks 🗸	Employment of Relatives Form (if applicable)	Jamie (DEL) Delegate	25 Mar 2019	Overdue	
		Schedule Appointment with UCF Global	Samuel Hendrick	23 Mar 2019	Overdue	
		Complete Section 1 of the Electronic I-9 (INT)	Samuel Hendrick	27 Mar 2019	Open	
		Complete 3- in-1 Form	Samuel Hendrick	27 Mar 2019	Open	
		Complete the Loyalty Oath-Rights to Inventions	Samuel Hendrick	27 Mar 2019	Open	
1		Instructions on Unleading Onhearding Desuments	Comucil Liondrick	27 Mar 2010	Open	



Key Takeaways

- At the department level, you have the ability to create additional tasks that are relevant to your department and or the employee's position.
- Will your department be able to use this additional feature for items that are handled via email today?



ONBOARDING DELEGATE TASKS



Onboarding Delegates-Tasks

- Verify Employee Completed Onboarding Tasks
- Complete Section 2 of the Electronic I-9
- Submit Hire ePAF
- Attach Employment Agreement to ePAF
- USPS Time Limited Memo (if applicable)
- Employment of Relatives Form (if applicable)
- Submit Signed Position Description



I-9 Processing

- Hiring Departments will continue to complete I-9s within the Electronic I-9 Express system (www.i9express.com).
- Continue to provide the employee with the instructions to complete Section 1 of the I-9 form so that they select the appropriate location.
- Hiring department must view the original documents to complete Section 2 of the I-9 Form.
- New Hire and Onboarding Delegate will log back into PageUp and mark task as completed once the I-9 form is finalized.



Employment of Relatives Form

- Completed Offline-outside of PageUp.
- Employment of Relatives Form is still required to be fully **executed/approved** by all parties **prior** to the individual being offered employment or begin working at UCF for any relative of a current UCF employee within the same unit, department, or college.
- Attach the fully executed and signed form to the Hire ePAF.



Submit Signed Position Description

- Onboarding delegates will see a task under "Your First Week" for Signed Position Description for **USPS and A&P** employees.
- The task is to provide position description to new hire to review and sign.
- Once signed by employee: via email, send copy of position description to either <u>comp@ucf.edu</u> (if not signed by Compensation Analyst) or <u>records@ucf.edu</u> (if signed by Compensation Analyst).



UCF Global-International Employees

- International employees will continue to go to UCF Global to complete their onboarding documents. UCF Global continues to complete the I-9 form for international employees.
- UCF Global will assist the international employees in completing the "Before the First Day" and "On the First Day Tasks."
- UCF Global **DOES NOT** have access to the Onboarding Dashboard as they are not listed as the Onboarding Delegate on the Offer Card.
- Hiring Departments will need to verify that the onboarding tasks have been completed as you would for domestic employees.
- Hiring Departments will need to verify the I-9 has been completed by UCF Global and mark as completed the "Complete Section 2 of the I-9" Task.
- Inform UCF Global if the hire was processed through PageUp.



Video-Complete Onboarding Tasks

You are controlling Jamie (DEL) Delegate's account. Return to your account

PageUp.

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Jobs Reports Jamie (DEL) 😪
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My Dashboard

Welcome Jamie (DEL), this is your Dashboard where you will see all your tasks organized in various stages.

Position Description My position description - Under review	New job O Jobs open 5 Team jobs open	Search Committee & Additional Viewers 3 Jobs requiring panel review	Guidelines / Tips RECRUITMENT • Submit a Job Card • Approve a Job Card • Manage Applicants • Create & Book an Event • Check References • Submit an Offer Card
Construction Offers 93 New hires 289 New hire tasks	ß		 Offer Job to a Candidate ONBOARDING Monitoring Employees' Onboarding Tasks Complete Onboarding Tasks Submit a Hire ePAF PageUp Video Video UCF President



Key Takeaways

- Customized Electronic Task List for Onboarding Delegates.
- Bulk Compile Feature
- International employees continue to meet with UCF Global, Employment & Taxation for completing of onboarding tasks.
- I-9s completed within I-9 Express and original documents must be viewed.



HIRE EPAFS



Submit Hire ePAF

- After the employee has completed the electronic Personal Data Form, a process will run overnight to export specific information to the ePAF system.
- Submit the Hire ePAF after confirming that the "Before the First Day" Tasks have been completed.



ePAF Video-Search Employee

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My Profile Advanced Search		Run BIP Reports View, schedule, or s	earch for BIP-based reports. wer			
Self Service Reports	0 0 -	Query Report Sc Report Manager	neduler			
My Information Employee Security Roles Employment Services Gervices Vork Authorization Expiration		Report List	ALL V Rep	ort Manager	0.0.	
Top Menu Features Description	0 -					
		Report Name	Report Description	Folder Name	Creation Date And Time	
		FX 30504 AE	Ist - Load Job Earnings Distri	HR REPORTS	02/22/2019 8:45AM EST	
		ZHR20234	Tab: Interface File	HR REPORTS	02/21/2019 12:53PM EST	



ePAF Video-Select Match Record

Favorites
Main Menu
Department Self Service
PAF Home Page

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Step 1 of 8: Candidate Search			
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Employee ID: Job Reg App	ID		
492639 Q 1316			
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*First Name: Middle Name: Phyllils			
*Last Name: *Date of Birth:			
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ePAF Video-Select Applicant Record

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Warning Message

 If you receive a warning message of "Entered National ID/SSN matches an existing individual at UCF", STOP, do not proceed with the ePAF and contact HR-Records.

Message
Warning Entered National ID/SSN matches an existing individual at UCF, do you still want to process the
applicant row? STOP: Contact HR-Records
The PeopleCode program executed a Warning statement, which has produced this message.
OK



ePAF: Contact Information

 ✓ Verify the name on the ePAF matches the employee's name on the I-9 Form.

*First Name:	Clifford	Middle:
*Last Name:	Danson	Suffix:
Email Address:	Pupdown3+168@gmail.c	com
Home Address	and Phone	
Home address is	s the person's permanent pl	hysical address and cannot be a P.O. Box.
*Country:	USA Q United States	
*Address 1:	3577 State Drive	
Address 2:		
*City:	Clermont	State: FL Q *Postal: 32489
County:	NFLA	
Home Phone:	386/242-3333	
Cell Phone:		
		<< Previous Next >>



ePAF: Identity Information

- The information will populate from PageUp.
- ✓ Verify Social Security Number matches the Social Security Number listed on the I-9.
- ✓ Check Enterprise Email box if an email address will be requested.
- ✓ Select Save and Next to proceed to the job information.

Name:	Danson,Clifford	E	mpl ID 5076929		
Identity Info					
Gender:	Male v	*Marital Status:	Married	¥	
Date of Birth:	12/01/1960	*Citizenship Status:	Naturalized	•	
Social Security	419-55-1133		Disabled		
Military Status:	No Military Service	*	Disabled Vetera	an	
Ethnic Group			Find	First 🕚	1 of 1 🕑 Last
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ePAF Video-Job Information

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Complete the fields b	elow with the appropriate job inforr	mation for the indi	vidual being hired.
Personal Info			
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Cit Status: Nativ			Personal Data Job Data
	lown3+203@gmaiil.com		Additional Pay
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Position	Non-Position		
*Employee Group	University Support Personnel	•	
*Pay Group:	USPS Non-Exempt	¥	
*Empl Class:	USPS Regular	Ŧ	
		<< Search	Next >>



Attachments-Hire ePAF

- There are still some documents that will need to be attached to the Hire ePAF for **employees hired through PageUp**.
- These include the following:
 - Faculty Employment Agreements
 - Post-Doctoral/Medical Resident Employment Agreements
 - USPS Time-Limited Memorandum (when applicable)
 - Fully Executed/Signed Employment of Relatives Form (when applicable)



ePAF Routing and Approval

- After the ePAF has been submitted, it will route to various workflow approvers depending on the type of hire and funding.
- When it reaches HR-Employment Services & Records, the team will review the ePAF information to ensure it matches the information on the offer card.
- The Records Team will verify that all the **"Before Your First Day**" and **"On Your First Day"** tasks have been completed.
- If all has been completed and is correct, the Hire ePAF will be approved and loaded into the HR system (job data).



Recap Onboarding Process

- Candidate will receive an email to accept offer.
- After candidate accepts offer, they will complete their Personal Data Form and onboarding tasks.
- Onboarding Delegate will log into PageUp and verify that the employee's tasks have been completed.
- Onboarding Delegate will complete their own tasks.
- Onboarding Delegate will meet in person with employee to complete I-9 Form with original documents.
- Onboarding Delegate or appropriate ePAF Originator will submit Hire ePAF. ePAF will route accordingly.
- Records team will review onboarding documents and approve Hire ePAF.

The Hire Process is Complete!



Key Takeaways

- Verify the "Before the First Day" Tasks have been completed before submitting Hire ePAF.
- Integration with Offer Card and the ePAF, less data entry.
- Select yes if hired through PageUp.
- Look for the "Match" to avoid creating duplicate id numbers.
- Minimal Documents Attached to ePAF.



WRAP-UP: ONBOARDING



Additional Information

- Sign-In Paperwork Checklist vs. Onboarding Dashboard
- Welcome/Offer Letters
- New Employee Orientation Date
- Hires Not Processed through PageUp
 - Continue with the current process.
 - Complete the paper forms.
 - Complete the ePAF as it's done today.
 - Data Entry into the Hire ePAF.
 - Attach the applicable documents with the naming convention to the ePAF.



THE FUTURE OF PAGEUP



Phase II

• OPS

- Hourly Non-Student Not Advertised
- Adjunct Faculty
- Graduate Assistantship
- Graduate Hourly

Electronic Position Descriptions

 Compensation feature which gives the ability to create, edit, and manage position descriptions within PageUp

Office of Institutional Equity update to hire process

- Faculty hires will be submitted through the system, eliminating the need for hire books
- Enhancements to the hire process to include a recruitment and interview plan
- Performance Management





Hire Process Questions:

Please contact <u>talent@ucf.edu</u>

Electronic Onboarding Questions:

Please contact <u>records@ucf.edu</u>

Department Team or Permission Questions:

• Please contact <u>hris@ucf.edu</u>



Questions? NTR OF FLOR RSI *1963* 40

