

Onboarding

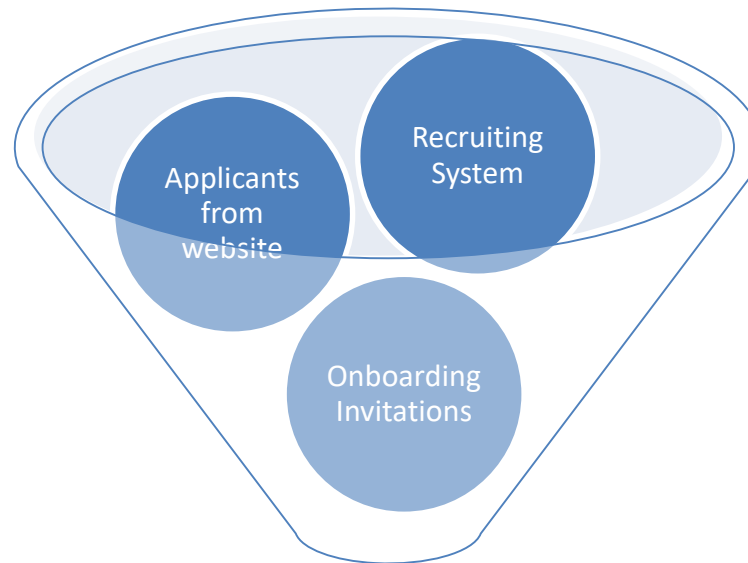
More

Definitions:

Prospects are those individuals in the Recruiting CRM system that have not yet requested to start the onboarding process.

Applicants are people that have completed a job application on the company website.

Candidates are those potential employees that were sent an invitation for employment either through the job application, recruiting or onboarding system.



Candidate starts the onboarding process.



Employment Lifecycle



Job Applicant applies online through the company website.

General Other Business Work History Education Skills Certification References

App Date Eligible to live and work in the US?

Position Applied for Referred by Available Start Date

Desired Salary \$ Pay Per Work Type

Have you ever been employed by or have any relative working for before, applied for work at ? Yes No

If so, when and where

Have you ever been sanctioned by a governmental agency? Yes No

If so, when and where

Have you ever been convicted of a criminal offense (felony or misdemeanor)? Yes No

If so, when and where

Note: No candidate will be denied employment solely on the grounds of conviction of a criminal offense. The date of the offense, the nature of the offense, including any significant details that affect the description of the event, and the surrounding circumstances and the relevance of the offense to the position(s) applied for may, however, be considered.

*Tabs will change color when required elements are completed. Click on Submit when finished with all tabs.



Employment Lifecycle



Managers can search for applicants based on application date, skills, etc.

The screenshot shows the UNIFY Job Applications search interface. At the top is the UNIFY logo and a navigation menu with items: Self Service Portal, Internal Resources (highlighted), Useful Links, Announcements, Polices & Procedures, Guidelines, Lender/Vendor, Training, Dashboard, Reports, and Marketing. Below the menu is the 'Job Applications' section. It features a 'Job Application Search' form with fields for Name, Phone, Start Date, and Date Range. There are 'Search' and 'Clear Search' buttons. To the right is a 'Skills' dropdown menu with options: -- All --, Automated Underwritir, C#, COBIT, Computer Hardware, and Computer Software. Below the search form, it says 'Show 10 entries' and 'Showing 1 to 3 of 3 entries'. A search bar and navigation arrows are also present. At the bottom is a table of job applications.

Name	Email	Phone	Status	Application Date	Submit Date	
John Smith			Started	5/13/2014		View Application
Sunny Jagwani			Started	5/8/2014		View Application
Test Applicant			Started	5/8/2014		View Application



Employment Lifecycle

More



Invitations for candidates can be sent from the Onboarding screen, Applicant Search screen or Recruiting Application.

Invitation

Name

First Middle Last Nick Suffix

Position

Company Title

Phone

Work Home Cell

Email Address Subject

Body

%CompanyLogo%
Dear %CandidateName%
Thank you for your interest in employment with %CompanyName%. To visit our website and commence the application process, please click on the link at the end of this e-mail and utilize the Login provided. Your password will be sent to you in a separate e-mail.
Please complete the application in its entirety and digitally sign it, as well as the Fair Credit Reporting Act Disclosure and Authorization. This Authorization allows us to verify the information provided on the application and complete a background check. The Human Resources Department will be in contact with you to review your application and the results of the background check.
If any questions arise during the completion of the application you may contact the Human Resources Department at %HRAdminPhone% or email at %HRAdminEmail%.

Design HTML Preview

Words: 6 Characters: 46

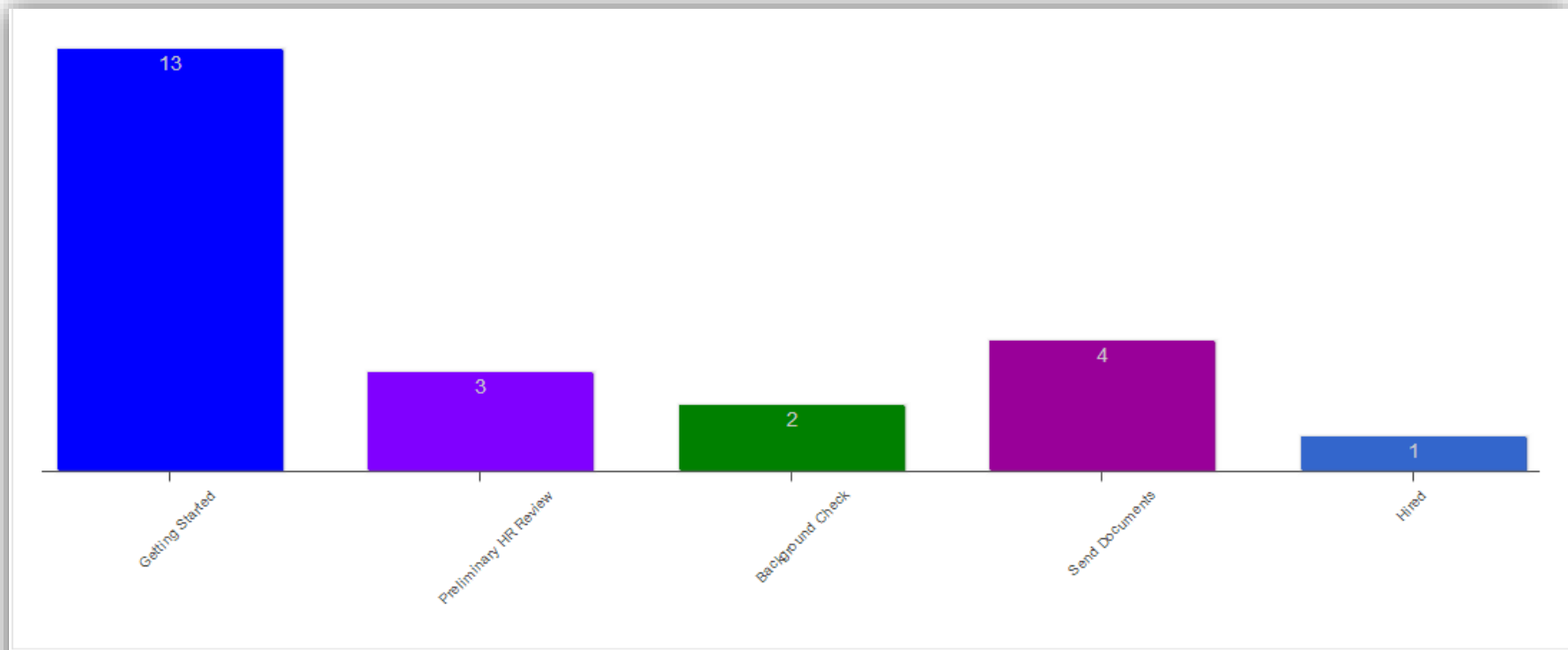
Send



Employment Lifecycle



Once invited, candidate progress can be tracked through the dashboard.



Employment Lifecycle



Drilldown on report allows viewing of more detail.

PENDING TASKS TO COMPLETE

test onboarding

Email: Phone:

OnBoarding

Previous Status

9/30/2014 9/30/2014 9/30/2014 9/30/2014 9/30/2014 9/30/2014 9/30/2014

Getting Started Preliminary Docs Preliminary HR Review Background Check Send Documents Documents Returned HR Review Completed Hire

At this stage, you should have received an email address with training instructions, website access and a email address.

For help call:
 Invitor Name:
 Invitor Phone:
 HR Director Name:
 HR Director Phone:

Manage Documents

Documents

Documents to be Assigned	Completed Date	Verified Date	Completed	Verified	Rejected	Rejection Notes
Confidentiality Agreement			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
IT Security Policy			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Safeguards Policy			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Fair Credit Authorization	9/30/2014	9/30/2014	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Employee Handbook Acknowledgement			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Documents to be Wet Signed	Completed Date	Verified Date	Completed	Verified	Rejected	Rejection Notes
19			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Voluntary Benefit Election Form			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Arizona Form A-4			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Form W-4 (2014)			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
2014 CA DE-4			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
FHA Certification (Staff)			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Direct Deposit Authorization Form			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Informational Documents

Setting up email
 Offer Letter (All Excluding LOs)
 Employee Handbook

General Other Business Work History Education References Licenses

App Date Eligible to live and work in the US?

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Desired Salary \$ Pay Per Work Type

Contact info is merged from HR system to minimize maintenance.

The Status names and order can be customized along with triggers, documents and notifications at each status.

Documents may be assigned based on State or Position of the Candidate. Red notification arrows disappear when all required documents are completed.



Employment Lifecycle

More



Once the candidate reaches the Hired status, their record with all pertinent information is available in the HR system. Many new tabs are provided which will be covered later in this presentation.

UNIFYTY Welcome, Sunny [Change Password](#) [Logout](#)

Self Service Portal Internal Resources Useful Links Announcements Policies & Procedures Guidelines Lender/Vendor Training Dashboard Reports Marketing

Employee View

[Return to Employee List](#) **Employee #** 10036

Employee Detail [Change/Unacad](#)

PHOTO NOT AVAILABLE

1099 Contract Employee

Supervisor Payroll Number 110036

First Name **David** Middle Name Last Name **Cole** Suffix Nick Name [Change Name](#) [Change Name](#)

[Send Email](#) Start Date 10/02/2015 Term Date [Terminate](#)

General Address LO Info Notes License Comp Plans Reviews Equipment Logins Ins App Websites Training Trans HR Expenses Exp Split Disclosures Time Off Request Compensation

Position/Location

Company **Big Deal Mortgage Lending** Location **1200 (Irvine)**

Job Title **Loan Officer** Position **Loan Officer**

Department **Sales** Supervisor **Kirk, Steve**

Room/Cube **Choose a Room**

Title on Business Card **Loan Officer** [Change Status](#)

Additional Supervisor **Please Select** Type **Time Card** [Add](#)

Additional Supervisor **Type**

Emergency Contact Info

Contact 1 **Tony Rodriguez**
Phone **602-333-5571**
Relationship **Spouse**

Contact 2 **Jose & Linda Rodriguez**
Phone **602-222-5571**
Relationship **Parent**

User Roles **General User**

Home Phone **(714) 555-5571** Fax **(602) 444-5571** [Create eFax](#) [Available eFax](#)

Work Phone **(714) 777-5571** Ext Work E-mail **david.cole@testmail.com**

[Available DIDs](#) Cell Phone **(714) 888-5571** Hide in Finder Home E-mail **david.cole@homemail.com**

Alt E-mail



Employment Lifecycle



When employees are terminated, as part of the Offboarding process, notices are sent to the required personnel, phone numbers are set back to Available status, external application accounts are cancelled and notifications are provided to ensure the return of company equipment (as assigned to the employee in Inventory).

