



Onboarding Guide

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Access to CHRS Recruiting

The CHRS Recruiting system is a single system that serves all CSU campuses. Your campus user name and password identifies you as an internal CSU user. Only internal users can access the system.

SSO stands for single sign-on, also known as our campus portal. With SSO enabled, you do not need to log in to separate websites because you have already logged in to the CSU intranet.

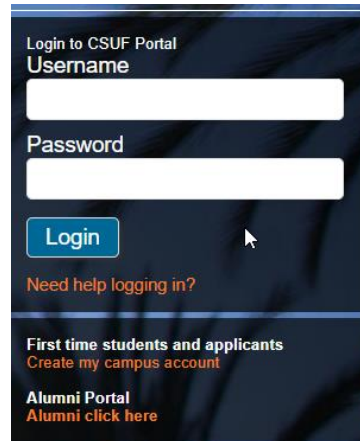
Depending on your user role, there are fields shown throughout this guide that are accessible for your review. If you need to change your user role or access in CHRS Recruiting, the IT HR Access Request Form (ARF) must be completed. The Department IT Coordinator (DITC) will typically complete the IT HR ARF for new employees. Current employees who need to change their access must also submit an IT HR ARF; check with your department for guidance.

**1. Open a web browser
(Google Chrome is
recommended)**

**IMPORTANT: POP-UP
Blocker needs to
be turned-off.**



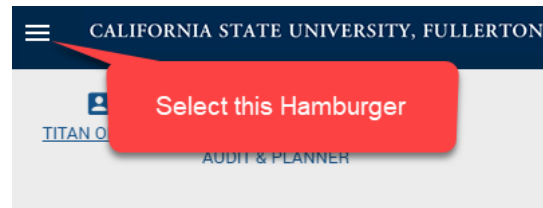
**2. Log into the Portal
and enter your
username and
password**



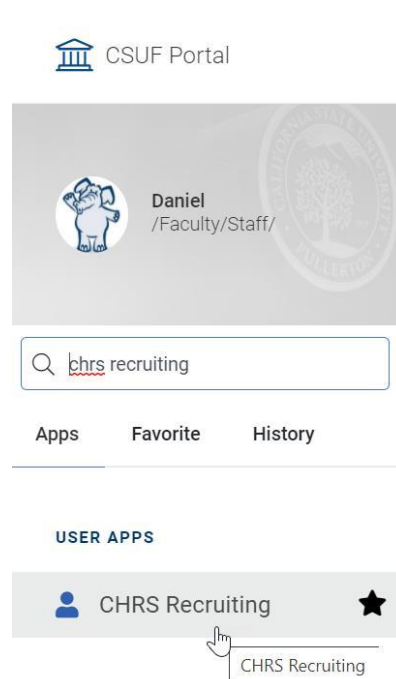
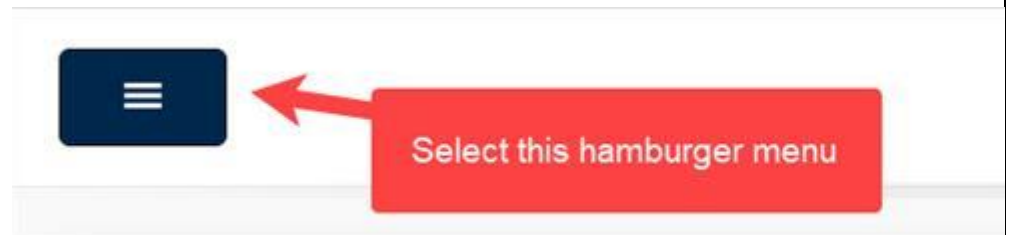
The screenshot shows the login interface for the CSUF Portal. It features a dark blue background with white text and input fields. The text 'Login to CSUF Portal' is at the top. Below it are two white input fields: the first is labeled 'Username' and the second is labeled 'Password'. A blue 'Login' button is positioned below the password field. Below the button, there is a link that says 'Need help logging in?'. At the bottom of the form, there are two sections: 'First time students and applicants' with a link 'Create my campus account', and 'Alumni Portal' with a link 'Alumni click here'.

3. Search for the CHRS Recruiting App

Current Portal (before 10/4/2021):



New Portal (as of 10/4/2021):



Introduction

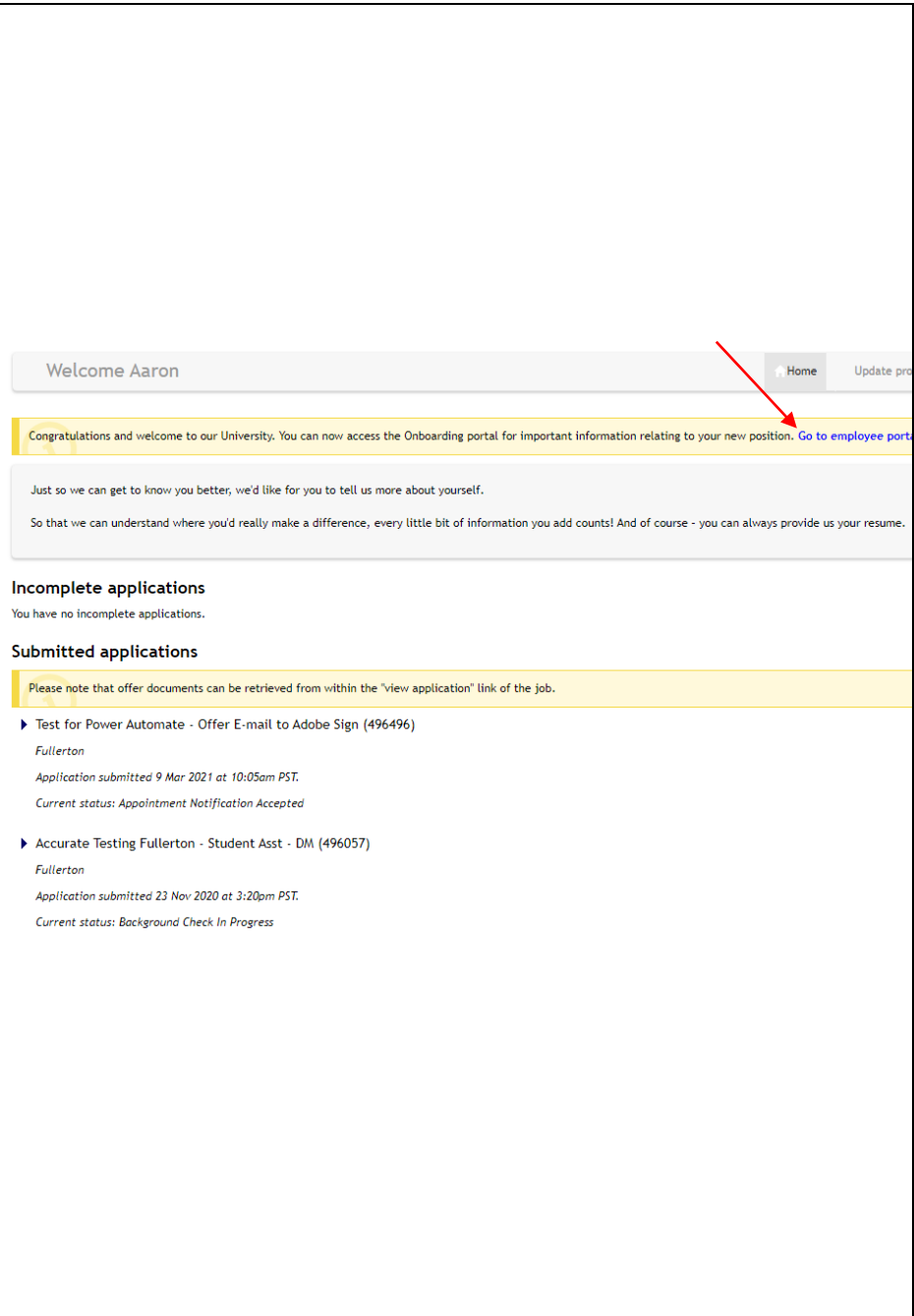
After the selected, Final Candidate has accepted the offer, they will gain access to the Onboarding Portal. The Onboarding Portal has a welcome video, links to related employee information, and onboarding tasks that are generated by the selected onboarding workflow on the offer card.

This guide will detail the onboarding component of the CHRS Recruiting system, and highlight how department users can support new employees with completing all onboarding tasks.

Accessing the Onboarding Portal for New Employees

1. Onboarding Portal Access for the New Employee

- A. New employees will be able to access the onboarding portal through their CHRS Recruiting applicant portal
- B. After accepting the position, a yellow banner will display at the top of their applicant portal
- C. They will select "Go to employee portal" to enter the onboarding portal



2. Onboarding Portal

A. Employees can navigate to the following tabs on the portal to learn more about the campus and resources available to them:

- About (the university)
- Total Wellness
- Employee Resources

B. A welcome message and video will greet the new employee

C. The selected onboarding workflow will generate tasks that the employee will need to complete

The screenshot shows the onboarding portal interface for Cal State Fullerton. At the top, a dark blue navigation bar contains the university logo and the text 'FULLERTON'. Below the logo are four tabs: 'Welcome', 'About', 'Total Wellness', and 'Employee Resources'. A red box labeled 'A' highlights the 'About', 'Total Wellness', and 'Employee Resources' tabs. Below the navigation bar is a large group photo of diverse university staff. A red box labeled 'B' highlights the main content area, which includes a 'Welcome to California State University, Fullerton!' message, a 'PRESIDENT'S WELCOME' video player, and a 'OUR TASKS' section. The video player shows a 'New Employee Welcome' video from Cal State Fullerton. The 'OUR TASKS' section lists several tasks with due dates of 30 Jun 2021: 'Payroll Forms Packet', 'I-9 Form', 'Mandated Reporter Form (if applicable)', and 'Telecommuting Form (if applicable)'. A red box labeled 'C' highlights the 'OUR TASKS' section.

3. Completing Each Task

When a task is selected, a pop-up screen will display. Tasks will contain guidance for employees. Several tasks will have links to documents that will need to be completed and submitted by the employee.

- A. The due date for the selected task will be displayed
- B. After completing the task, employees should select the "Mark as completed" button at the bottom left of the screen
- C. "Close" at the bottom right of the screen can be selected to close the task screen

A Step due: 29 May 2021

Follow the link below to complete the new hire forms. The link contains instructions for how to complete each form.

[New Hire Forms via Adobe Sign](#)

If you have questions, please reference our [Payroll Services website](#) and reach out to the payroll team.

The link contains the following forms:

- Cover Page
- Student Payroll Action Request (SPAR Form)
- Direct Deposit
- Self-ID Forms (Voluntary, Veteran, Disability)
- CSU Form SSA-1945

B [Mark as completed](#) **C** [Close](#)

4. Completed Tasks

Completed tasks will have a strikethrough the task, as well as have a checkmark when viewing all tasks on the onboarding portal.

YOUR TASKS

Before your first day

~~Complete New Hire Forms~~



I-9 Form

Due: 29 May 2021

Department Users Accessing Onboarding Tasks for New Employees

Supervisors and Onboarding Delegates will have access to view onboarding tasks for their new employees. To ensure these users can see the new employee's onboarding tasks, please ensure that their name is listed in the corresponding fields on the offer card.

1. Onboarding Delegates and Reports To Supervisors

A. **Onboarding Delegates** – Within the "Onboarding section" of the offer card for a selected candidate, names can be entered as "Onboarding Delegates". These users, and the "Reports To" supervisor, will be able to review the new hire tasks assigned to both the new hire, and the tasks assigned to the supervisor

- Onboarding Delegates 2 and 3 will be the only users to receive e-mail reminders of tasks needing to be completed

ONBOARDING

OfferType:*	<input type="text" value="Select"/>
Pay Group:*	<input type="text" value="Select"/>
Offer Approval Type:*	<input type="text" value="Select"/>
Onboarding Form:	<input type="text" value="Select"/>
Onboarding Portal:	<input type="text" value="None"/>
Onboarding workflow:	<input type="text" value="None"/>
Reports To:*	<input type="text" value="Susamma Barua"/> Email address: sbarua@fullerton.edu
Onboarding Delegate 1:	<input type="text"/> No user selected
Onboarding Delegate 2:	<input type="text"/> Email address: cmuriel@fullerton.edu
Onboarding Delegate 3:	<input type="text"/> No user selected

2. Viewing Onboarding Tasks for a New Employee

Supervisors and Onboarding Delegates can navigate to the "Offers" tile on their dashboard and select "New Hires" to view onboarding tasks for new hires.

Users can also access new hire onboarding tasks by selecting "My New Hires" from the Main Menu. The next few screenshots correspond to My New Hires (there is another option called "My New Hire Tasks" that will be discussed later in this guide).

My Dashboard

Welcome Denise, this is your Dashboard where you will see all your tasks organized in various stages.

The dashboard contains the following tiles:

- Position Description:** Not applicable to faculty. [Manage position descriptions ...](#)
- Jobs:** 3 Jobs open. [New job](#)
- Approvals (May not be applicable):** 0 Jobs awaiting your approval. 2 Approved
- Advertisements:** 0 Advertisements
- Applications:** 2 Jobs have applicants for review. 0 Applicants assigned to you for review
- Search committee review:** 0 Jobs requiring panel review
- Interviews:** 0 Scheduled Interviews
- Offers:** 0 Offers awaiting your approval. 1 New hires. 0 New hire tasks. (This tile is highlighted with a red box)

[Guidelines / Tips](#)

3. My New Hires

A. Users will have the ability to search for a desired candidate using several parameters

B. Select "View all tasks" for the desired candidate

My new hires A

First name: Last name: Requisition Number: Title: Clear Search

Application status: Business unit: *Division:

Applicant name	Requisition Number	Title	Application status	
Aaron Test 1	496054	Accurate Testing Fullerton -	Appointment Notification Accepted, Form Completed (SYS)	View offer details View all tasks
Aaron Test 5	496187	Accurate Testing Fullerton -	Appointment Notification Accepted (SYS)	View offer details View all tasks

Page 1 of 1 | Records 1 to 2 of 2

B

4. New Hire Tasks

A. Users can display tasks based on the person that they are assigned to:

- All tasks
- Manager/Supervisor (Onboarding Delegates)
- Employee

B. Users can select a task to view.

New hire tasks

Aaron Test 1
Position
Accurate Testing Fullerton - Student Asst - DM
Start date
Mar 22, 2021

Assigned to
All tasks Manager/S... Employee Add new task

Notify updates

Add optional tasks
No tasks
My Favorite Tasks

Task	Assigned to	Due date	Status
Before your first day + Add			
Payroll Forms Packet	Aaron Test 1	21 Mar 2021	Open
I-9 Form	Aaron Test 1	21 Mar 2021	Open
Mandated Reporter Form (if applicable)	Aaron Test 1	21 Mar 2021	Open
Review Onboarding Portal Tabs	Aaron Test 1	21 Mar 2021	Open
1st Day Itinerary	Denise Mitchell	17 Mar 2021	Open
Order Keys (if applicable)	Denise Mitchell	17 Mar 2021	Open
Procurement Card (if applicable)	Denise Mitchell	31 Mar 2021	Open
Workstation Set Up	Denise Mitchell	17 Mar 2021	Open
Your first day + Add			
Activate Titan Portal & DUO Account	Denise Mitchell	21 Mar 2021	Open
CSUF Organization Information	Aaron Test 1	25 Mar 2021	Open
Red Folder	Aaron Test 1	25 Mar 2021	Open

5. Viewing a Task

When a task is selected, users will be able to see the task as it was written for the user assigned.

A. When a hiring manager or Onboarding Delegate views a task that is assigned to the Manager/Supervisor, the option of "Complete task" will be available

Please note that only the assigned user can mark the task as complete.

Payroll Forms Packet

Step due: 29 Mar 2021

Welcome aboard! Follow the link below to complete the first set of forms to begin the Onboarding process. The AdobeSign link below contains instructions for how to complete each form.

[Payroll Forms Packet](#)

If you have questions, please reference our [Payroll Services website](#) and reach out to the payroll team.

This link contains the following forms:

- Cover Page
- Oath of Allegiance
- Designation of Person Authorized to Receive Warrants
- EAR (Employee Action Request)
- Direct Deposit Form
- CalPERS Reciprocal Self-Certification Form
- Self-Identification Forms (Voluntary, Veteran, Disability)

Cancel

1st Day Itinerary

Step due: 25 Mar 2021

Your new staff hire Ana Test 1 will be starting soon. Please prepare a 1st Day Itinerary Form and send it to the HRDI Recruiter.

Be sure to provide a completed copy of the 1st Day Itinerary to your new hire.

[1st Day Itinerary Form](#)

[1st Day Itinerary Form \(use for facilities positions only\)](#)

Cancel Complete task

6. Adding and Editing tasks

- A. Users can select "Add new task" or "Add" in the task group to add to the list of tasks that need to be completed
- B. The pencil icon can be selected to update the task. Users should only edit tasks that they created
- C. Tasks with a trash can icon are optional. Users can review the task, and delete as necessary

New hire tasks
















Aaron Test 1
Position
Accurate Testing Fullerton - Student Asst - DM

Start date
Mar 22, 2021

Notify updates

Add optional tasks ^
No tasks
My Favorite Tasks v

Assigned to
All tasks Manager/S... Employee Add new task

Task	Assigned to	Due date	Status	
Before your first day				+ Add
Payroll Forms Packet	Aaron Test 1	21 Mar 2021	Open	
I-9 Form	Aaron Test 1	21 Mar 2021	Open	
Mandated Reporter Form (if applicable)	Aaron Test 1	21 Mar 2021	Open	
Review Onboarding Portal Tabs	Aaron Test 1	21 Mar 2021	Open	
1st Day Itinerary	Denise Mitchell	17 Mar 2021	Open	
Order Keys (if applicable)	Denise Mitchell	17 Mar 2021	Open	 
Procurement Card (if applicable)	Denise Mitchell	31 Mar 2021	Open	 
Workstation Set Up	Denise Mitchell	17 Mar 2021	Open	 
Your first day				+ Add
Activate Titan Portal & DUO Account	Denise Mitchell	21 Mar 2021	Open	
CSUF Organization Information	Aaron Test 1	25 Mar 2021	Open	 
Red Folder	Aaron Test 1	25 Mar 2021	Open	

7. Adding a New Task

Users will need to complete the following screen to create a new task.

- A. If users have a task that is used repeatedly for all new hires, they can select the "Add to favorites" box. This will allow the user to select this task to be added to each new employee when viewing their task list.

New task ✕

Title*

Group*

Due date Due time

Description Merge fields
B *I* U ~~S~~ ...

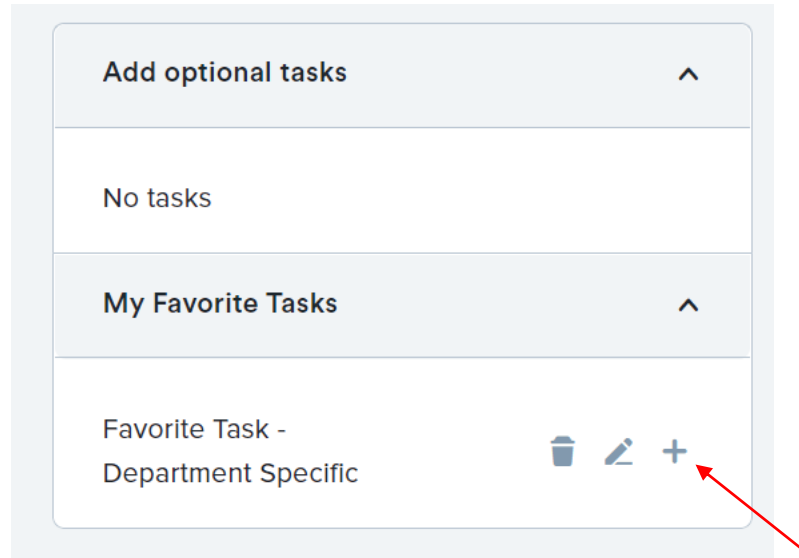
Activity type

Task allocated to*
 Both Manager/Supervisor Employee

A Add to favorites

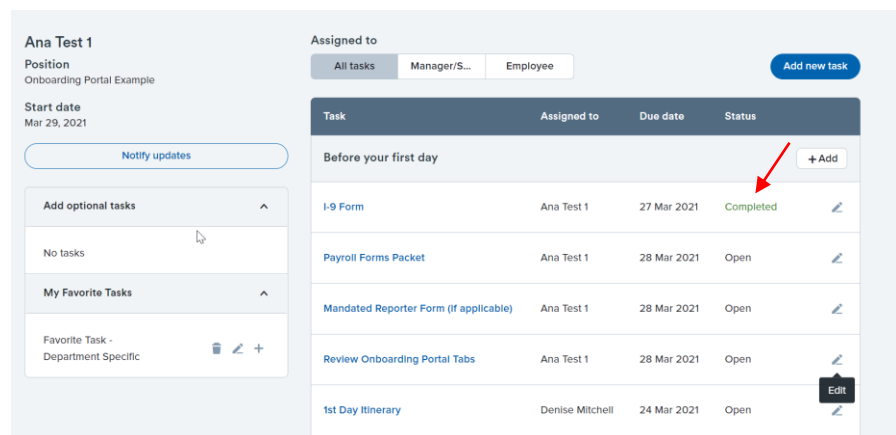
8. Favorite Tasks

After a task is added to the favorite task list, users will see this task under their "My Favorite Tasks" listing. By selecting the plus icon they can add this task to the new hire they are currently viewing.



9. Completed Tasks

When a task is completed, the status of the task will be updated to "Completed" in the task list.

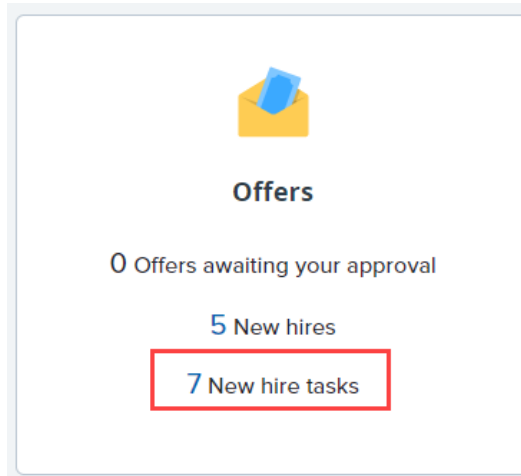


10. Bulk Complete

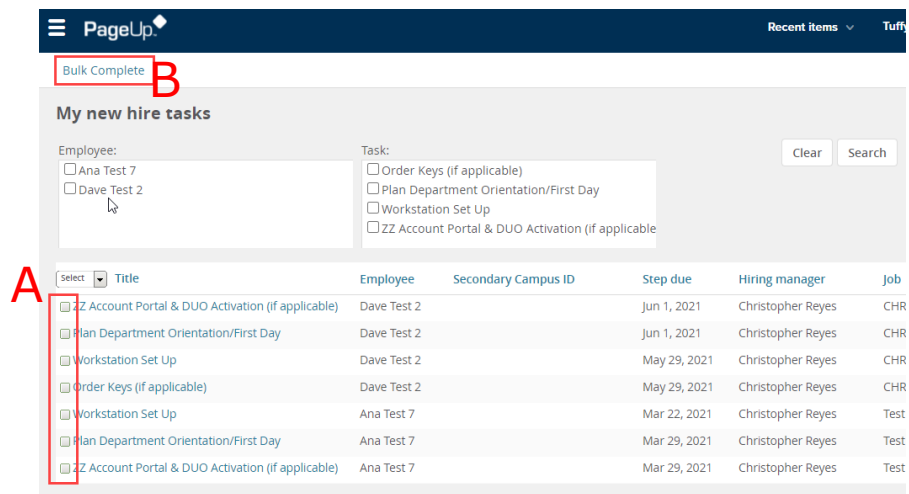
Users that would like to mark tasks complete in bulk, can do so by navigating to the "New hire tasks" button on the "Offers" tile on their dashboard, or by using the Main Menu.

On this following page, tasks can be filtered by employee or task.

- A. Users can select the desired tasks.
- B. Users can then select "Bulk Complete" to mark all selected tasks as completed.



The image shows a dashboard tile titled "Offers" with a yellow envelope icon. It displays "0 Offers awaiting your approval", "5 New hires", and "7 New hire tasks" (the latter is highlighted with a red box).



The image shows the "My new hire tasks" page in the PageUp system. It includes a "Bulk Complete" button (labeled B), a filter section for "Employee" (with "Dave Test 2" selected) and "Task" (with "ZZ Account Portal & DUO Activation (if applicable)" selected), and a table of tasks. A red box (labeled A) highlights the checkboxes in the table.

Select	Title	Employee	Secondary Campus ID	Step due	Hiring manager	Job
<input type="checkbox"/>	ZZ Account Portal & DUO Activation (if applicable)	Dave Test 2		Jun 1, 2021	Christopher Reyes	CHR
<input type="checkbox"/>	Plan Department Orientation/First Day	Dave Test 2		Jun 1, 2021	Christopher Reyes	CHR
<input type="checkbox"/>	Workstation Set Up	Dave Test 2		May 29, 2021	Christopher Reyes	CHR
<input type="checkbox"/>	Order Keys (if applicable)	Dave Test 2		May 29, 2021	Christopher Reyes	CHR
<input type="checkbox"/>	Workstation Set Up	Ana Test 7		Mar 22, 2021	Christopher Reyes	Test
<input type="checkbox"/>	Plan Department Orientation/First Day	Ana Test 7		Mar 29, 2021	Christopher Reyes	Test
<input type="checkbox"/>	ZZ Account Portal & DUO Activation (if applicable)	Ana Test 7		Mar 29, 2021	Christopher Reyes	Test