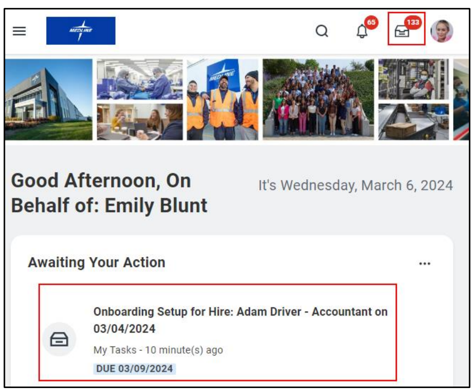
Onboarding
Managers

Contents

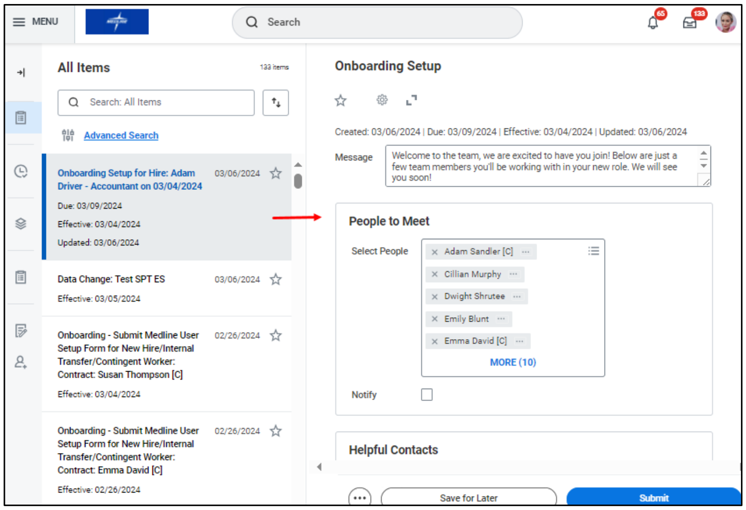
Onboarding Setup Task

Please note that this **Onboarding Setup Task** section is not applicable to front-line employee Managers.

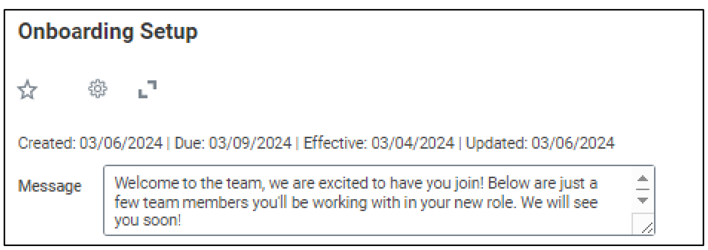
1. Once an employee is hired in Workday, you will receive an **Onboarding Setup** task in your **My Tasks Inbox**. Navigate to your **My Tasks Inbox** by clicking the icon in the top right-hand corner of your Workday Homepage, or from the **Awaiting Your Action** section in the middle of your Workday Homepage.



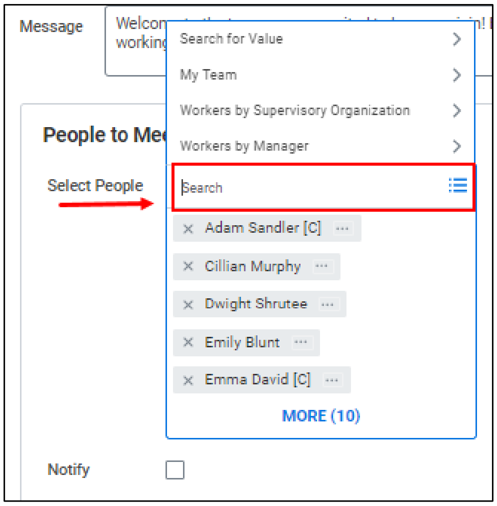
2. Click the **Onboarding Setup** task to open its details on the right-hand side of the screen. The welcome **Message**, **People to Meet** and **Helpful Contacts** will appear on the new hire's **Onboarding** dashboard.



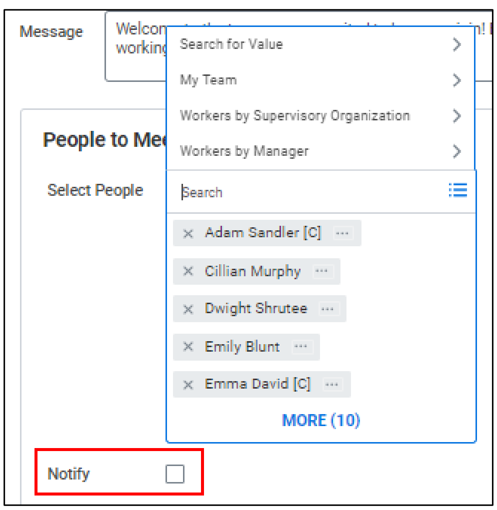
3. Review the automatically populated welcome **Message** and modify it as you see fit.



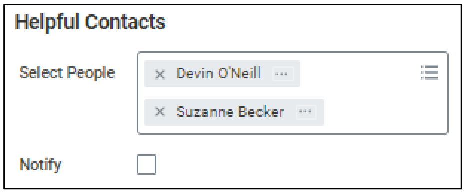
4. There will be employees automatically populated in the **People to Meet** section. You can remove employees by clicking the **X** Icon (×) and add employees by clicking the **Menu** icon (☰) then typing the employee's name into the **Search** field.



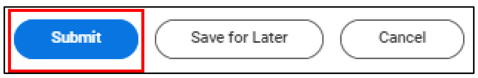
5. Check the **Notify** box to notify the employees that they are the new hire's **People to Meet**.



6. Follow the same steps as above to update the **Helpful Contacts** section.

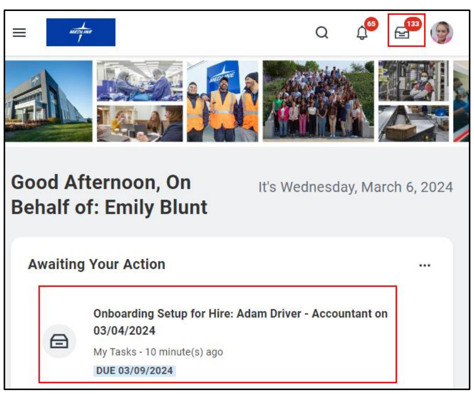


7. Once your review and modifications are complete, click **Submit** at the bottom of the page. You will then have access to the tasks in the **Manager Onboarding Tasks** section below.



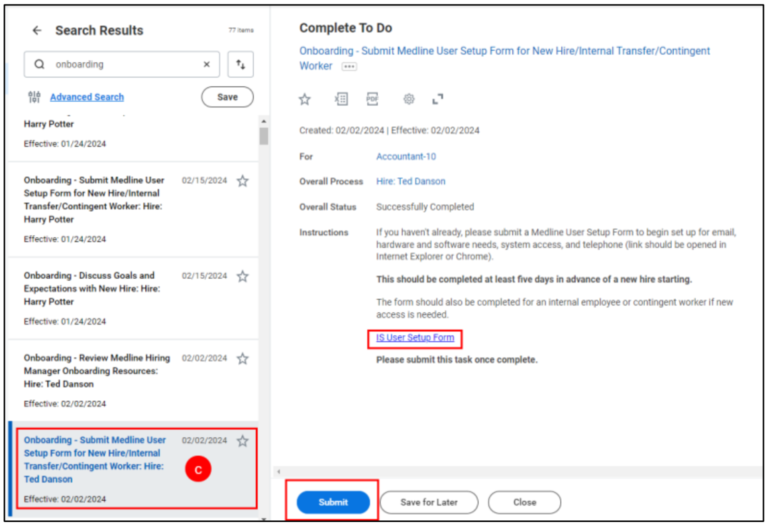
Additional Manager Onboarding Tasks

1. After an employee is hired, you will be required to complete specific Manager onboarding tasks from your **My Tasks Inbox**. Navigate to your **My Tasks Inbox** by clicking the icon in the top right-hand corner of your Workday Homepage, or from the **Awaiting Your Action** section in the middle of your Workday Homepage.



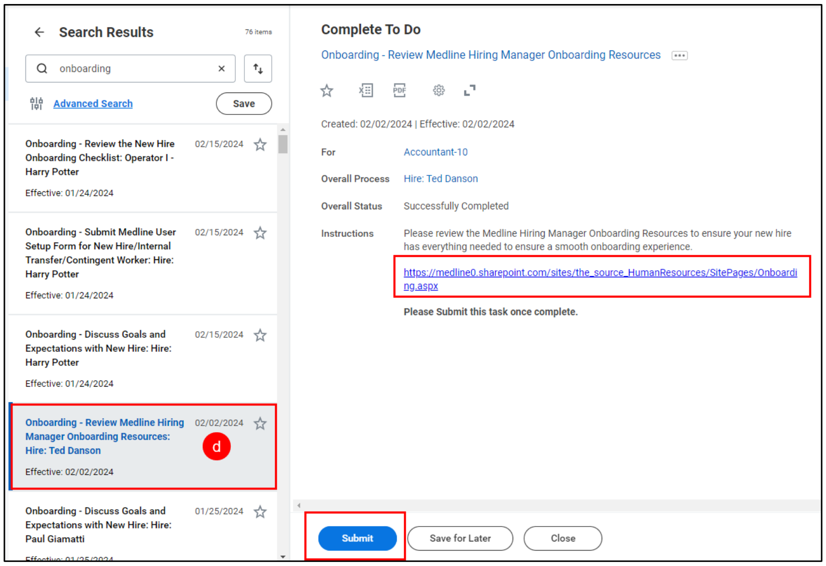
2. In your **My Tasks Inbox,** you will see the following onboarding tasks:
   a. **Discuss Goals and Expectations with New Hire** (Only available once New Hire starts day 1)
   b. **Complete Hiring Manager Experience Survey for New Team Member** (US New Hires only)
   c. **Submit Medline User Setup Form for New Hire/Internal Transfer/Contingent Worker**
   d. **Review Medline Hiring Manager Onboarding Resources**
   e. **Your New Employee Started Today** (Only available once New Hire starts day 1)

3. With the exception of onboarding tasks a) and e) above, the tasks do not have to be completed in any particular order. For this example, we will begin with the user setup form task. Select **Onboarding – Submit Medline User Setup Form for New Hire/Internal Transfer/Contingent Worker**. Next, click on the **IS User Setup Form** and fill out all required details to begin set up for email, hardware, software, system access and telephone. Once complete, click **Submit** to continue.

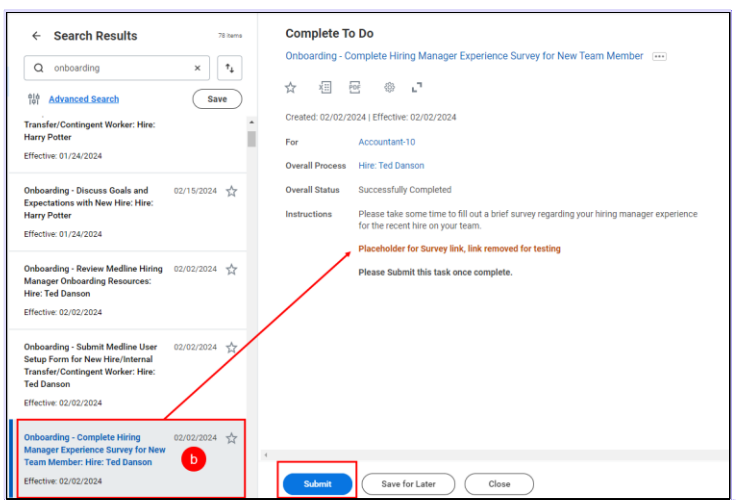


Please note that this step should be completed at least 5 days in advance of a new hire starting.

4. Next, complete **Onboarding – Review Medline Hiring Manager Onboarding Resources**. Click on the available link in the task and review **the Medline Manager Onboarding Resources** to ensure your new hire has everything needed to ensure a smooth onboarding experience. Once complete, select **Submit** to proceed.



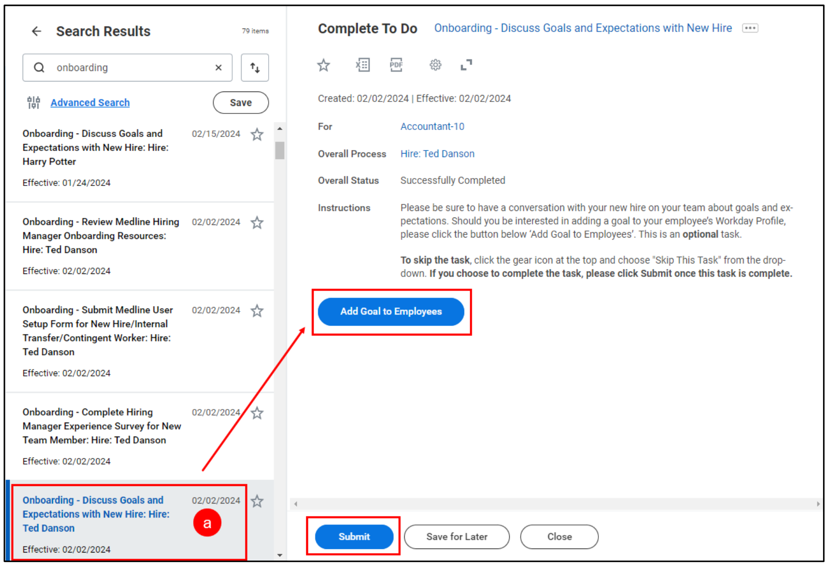
5. Next, and this step is only applicable if they are a new hire in the US, complete **Onboarding – Complete Hiring Manager Experience Survey for New Team Member**. Select the **Survey Link** in the task and fill it out. Once complete, click **Submit** to continue.



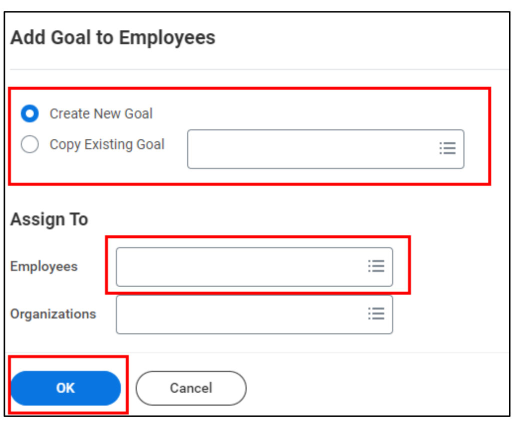
Commented [LC1]: Medline: To update screenshot with Survey Link once Gold tenant is built (late May/Early June)

6. From here, all onboarding tasks should be completed. Once the new hire starts on day 1, you will be prompted by another task called **Onboarding – Discuss Goals and Expectations with**

New Hire. This is an optional task. If you wish to **Add a Goal to Employee,** click the button. Otherwise, click **Submit.**

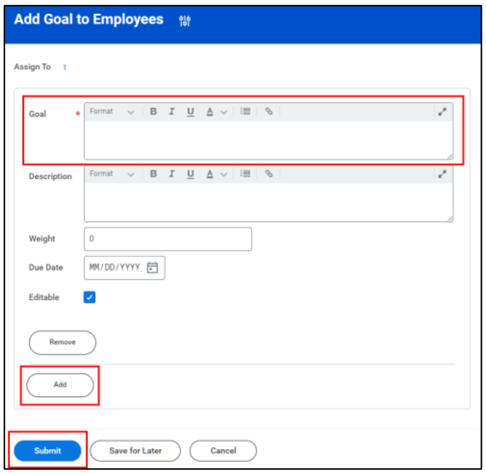


7. If you select **Add a Goal to Employee,** you will be prompted to **Create a New Goal** or **Copy an Existing Goal** for this employee. Next, assign the goal to the **Employee**. Search for the New Hire under **Employees.** Select **OK** to proceed.

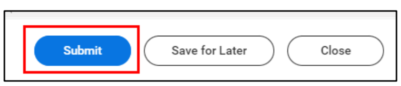


Please note, only assign goals to **Organizations** if you would like to assign a goal to all direct reports.

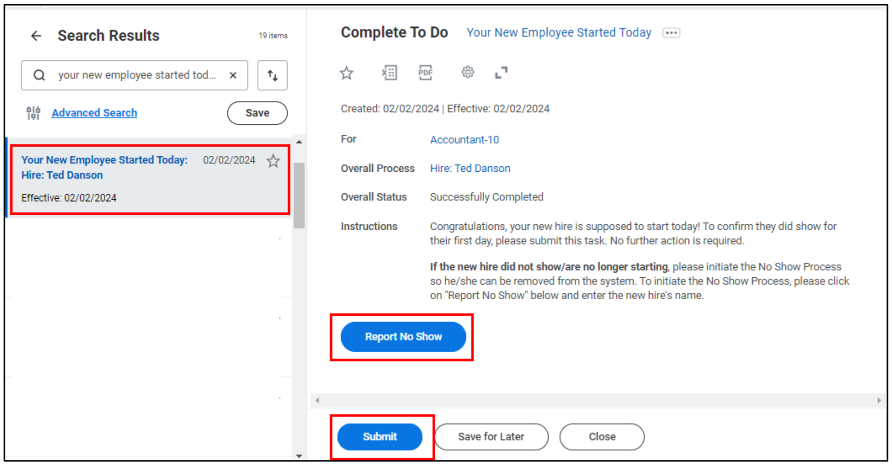
8. If you select **Create a New Goal** for an employee, enter the **Goal** in the text box. Next, you can add additional information in the **Description** and **Weight** fields and indicate a **Due Date**. Select **Add** to add more than one goal. Once complete, click **Submit.**



9. Next, go back to your **My Tasks Inbox** and click **Submit** in the **Onboarding – Discuss Goals and Expectations with New Hire** task to complete it.



10. In addition, on day 1, you will receive a **"Your New Employee Started Today"** task. This task is intended to confirm if the New Hire has started work that day. If they have started on their first day, click **Submit** to confirm. If they did not show up or are no longer starting that day, click **Report No Show** to initiate the No Show Process.



11. If you select **Report No Show,** you will be prompted to enter the **Worker's** name. Click **Ok** to proceed to remove them from the system and complete the **No Show Process**.