

NeoGov Onboarding Manual

The NeoGov Onboarding module automates the issuance, completion and retrieval of the various forms that the new hire is required to complete. This module also includes any links to policies and new hire information. It gives full visibility into the progression of completion by the new hire and you can print completed forms.

To login please enter the NeoGov Onboard URL (<https://onboard.neogov.com>) in your browser and then enter Username (UH email address) and Password.

[Recommended browsers:

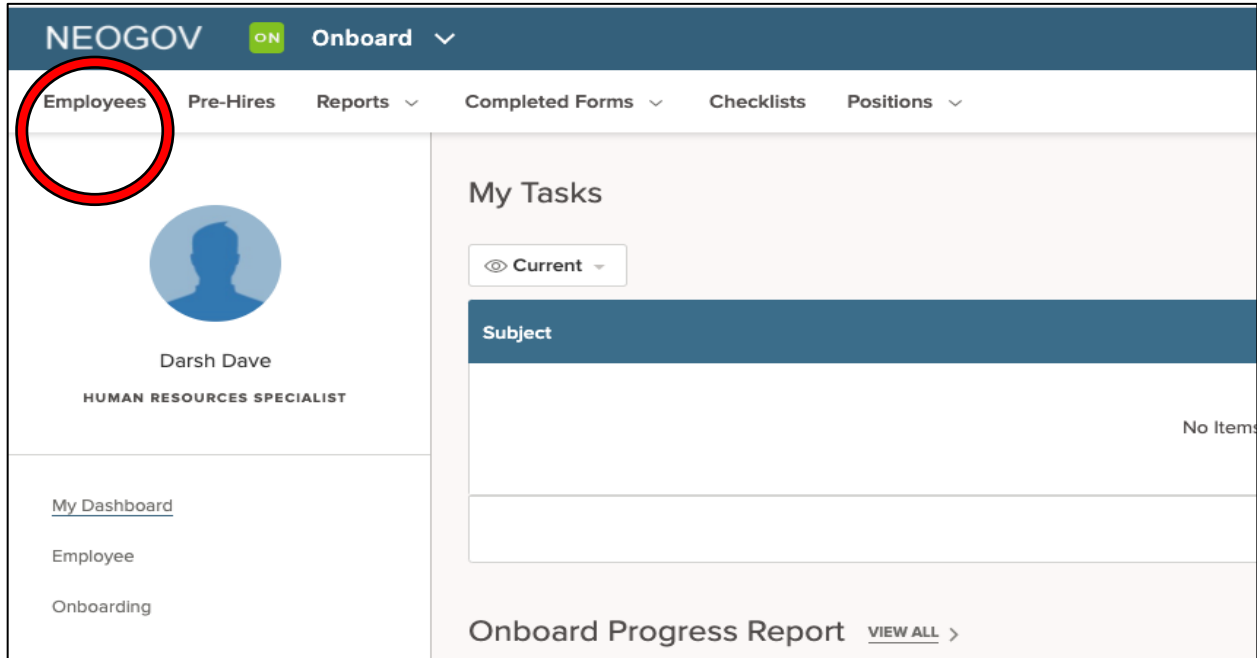
- Google Chrome (version 47 and higher)
- Microsoft Edge (version 20 and higher)
- Microsoft Internet Explorer 11]

Topics:

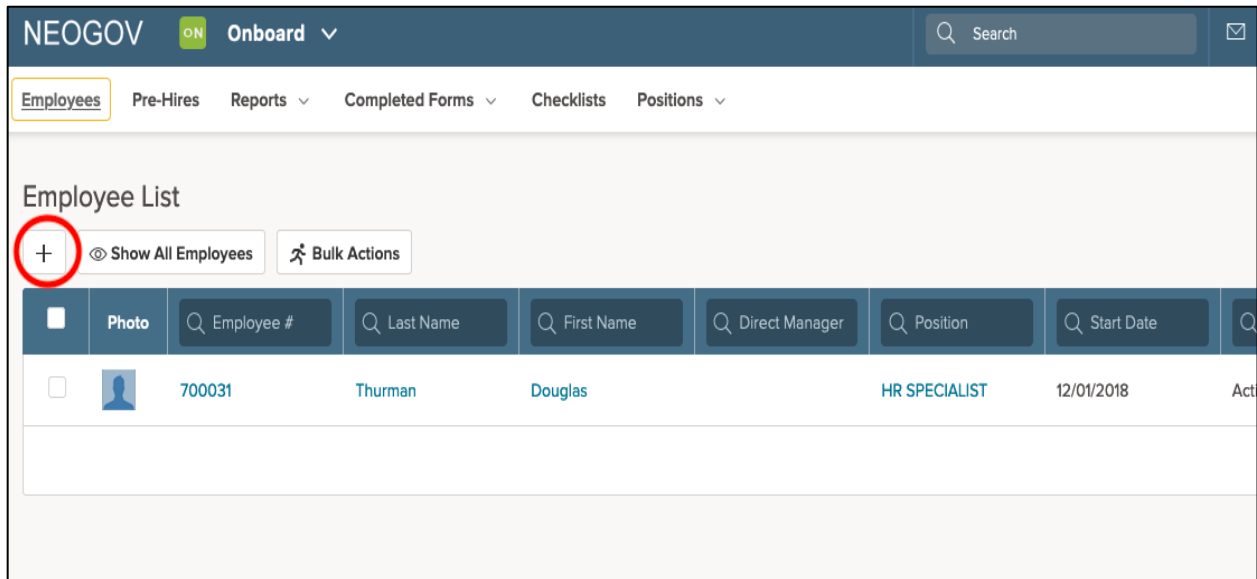
1. [To Add New Hire](#)
2. [To Assign Checklist to New Hire](#)
3. [To Lock/Unlock Forms](#)
4. [To Update/Edit/Delete Forms](#)
5. [To Download/Print Forms](#)
6. [To Delete/Reassign Checklist](#)
7. [Sample Email Messages](#)
8. [Position Chart \(Lecturer Hire\)](#)
9. [Position Chart \(Casual Hire\)](#)
10. [Checklist Chart](#)

To Add New Hire

1. Click “Employees” located on the top left corner of the screen



2. List of employees within your department/division will be displayed here. Click on the “+” button located left portion of the page.



3. The “Add Employee” page will appear. Enter the following information into the fields:

- **First Name:** Enter legal first name
- **Last Name:** Enter legal last name
- **Employee #** Enter UH identification number
 - If you do not have UH identification number then contact HR staff to update it on your behalf
 - If the employee is hired by different campus, then enter “KapCC-<UH User Number>”. (For example: if the UH user number is 12345678, then enter KapCC-12345678.
- **Email:**
 - If adding a new hire, use the email address the new hire provided on their application
 - If adding a re-hire, then use “@hawaii.edu” email address.
- **Start Date:**
 - This will determine the due date for assigned forms/tasks
 - For Fall Lecturers enter – 9/1/20xx
 - For Spring Lecturers enter – 1/15/20xx
 - For other employees enter – Actual Hire Date
- Keep the rest of the fields empty.


*Fields are required.


First Name *

Last Name *

Employee # *

Email *

Start Date * 

Separation Date 

Address 1

Address 2

City

State

- Click “Choose Position” to locate new hire’s position number. (Refer [Position Chart](#) at the end of this manual)
- Keep Social Network Information fields empty.
- Check the “Send Activation” box

The screenshot shows a user profile form with several sections. The 'Position' section has a 'Choose Position...' button circled in red. The 'Social Network Information' section has fields for 'Linkedin' (Public Profile URL) and 'Twitter' (Twitter Handle). The 'Online Access User Account' section has a 'Send activation' checkbox circled in red. At the bottom right, there are 'Save' and 'Cancel' buttons, with the 'Save' button circled in red.

4. Click “Save”

An activation email will be sent to the new hire containing their username and a hyperlink to activate their account.

NOTE: The hyperlink will expire after 5 days if account is not activated.

If the employee doesn’t activate the account in 5 days then you need to send the activation link again.

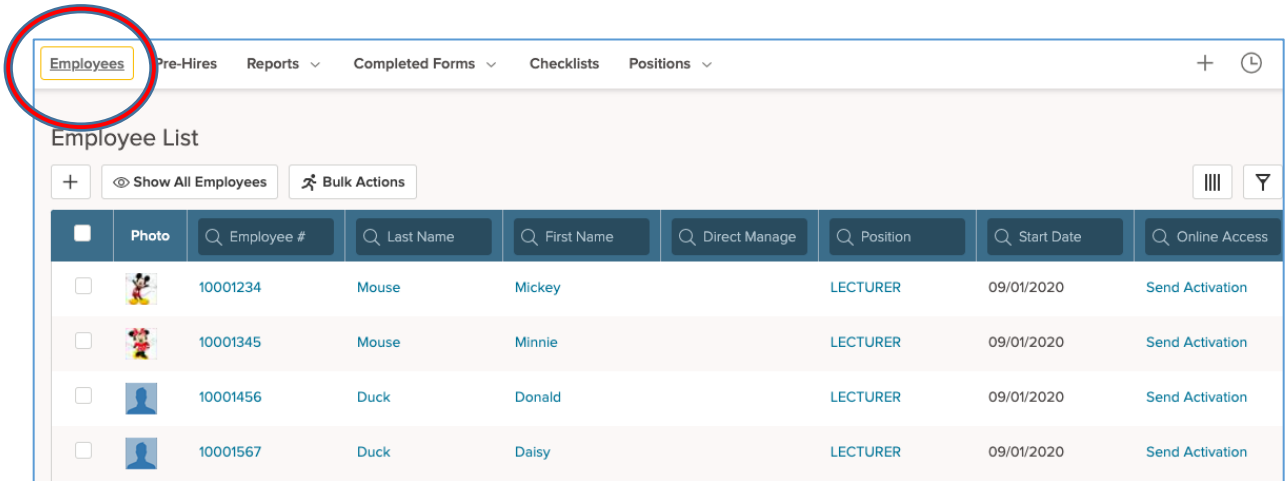
To resend the activation link: Click on “Employee” tab (top right corner), scroll to the employee name and press “send activation” link.

The screenshot shows a web application interface for managing employees. At the top, there is a navigation bar with tabs: 'Employees' (highlighted), 'Pre-Hires', 'Reports', 'Completed Forms', 'Checklists', and 'Positions'. Below the navigation bar is the 'Employee List' section. It includes a search bar, a '+ Show All Employees' button, and a 'Bulk Actions' button. The main content is a table with columns for Photo, Employee #, Last Name, First Name, Direct Manager, Position, Start Date, Online Access, and Active. The table contains six rows of employee data. The fifth row, for John Doe (Employee # 12345678, Position LECTURER), has a 'Send Activation' link circled in red.

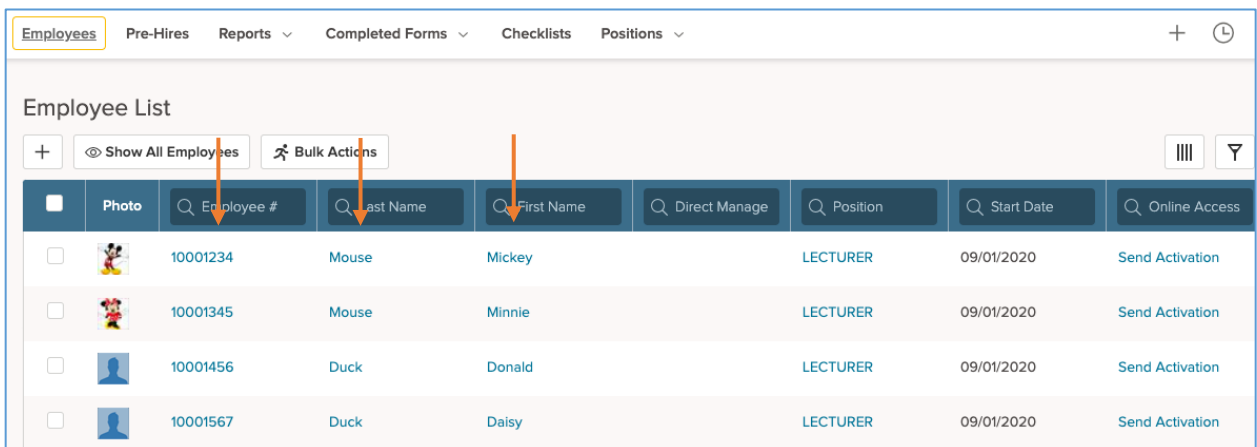
	Photo	Employee #	Last Name	First Name	Direct Manager	Position	Start Date	Online Access	Active
<input type="checkbox"/>						SECRETARY II	01/06/2020	Activated	Yes
<input type="checkbox"/>						INSTRUCTOR, CC, 9...	01/01/2020	Activated	Yes
<input type="checkbox"/>						HUMAN RESOURCE...	12/01/2018	Activated	Yes
<input type="checkbox"/>						HUMAN RESOURCE...	05/01/2019	Activated	Yes
<input type="checkbox"/>		12345678	Doe	John		LECTURER	09/01/2020	Send Activation	Yes
<input type="checkbox"/>						SECRETARY II	08/19/2019	Activated	Yes

To Assign Checklist to New Hire

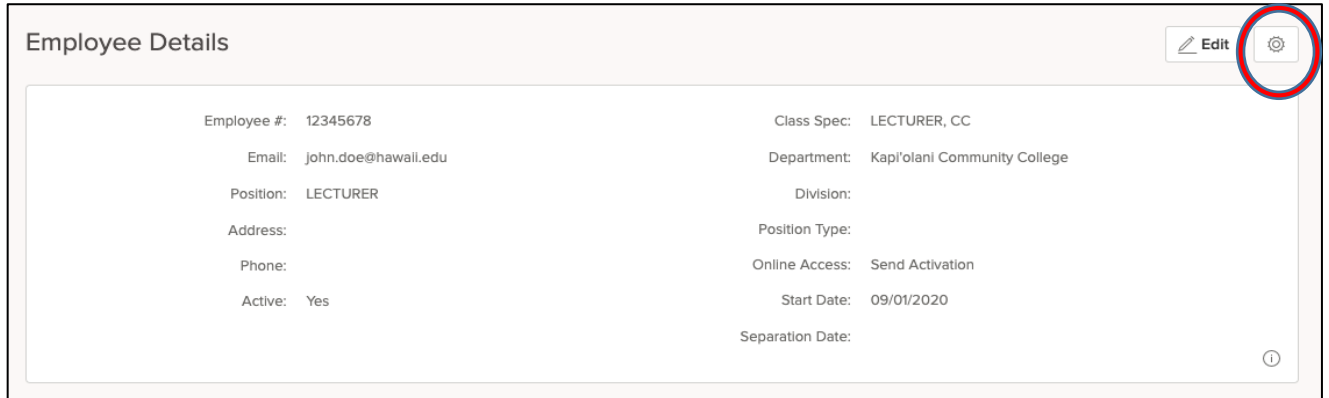
1. Click “Employees”, located on the top left corner of screen and “Employee List” page will be displayed.



2. From displayed list of employees, click on either the “Employee #”, “Last Name”, or “First Name”.

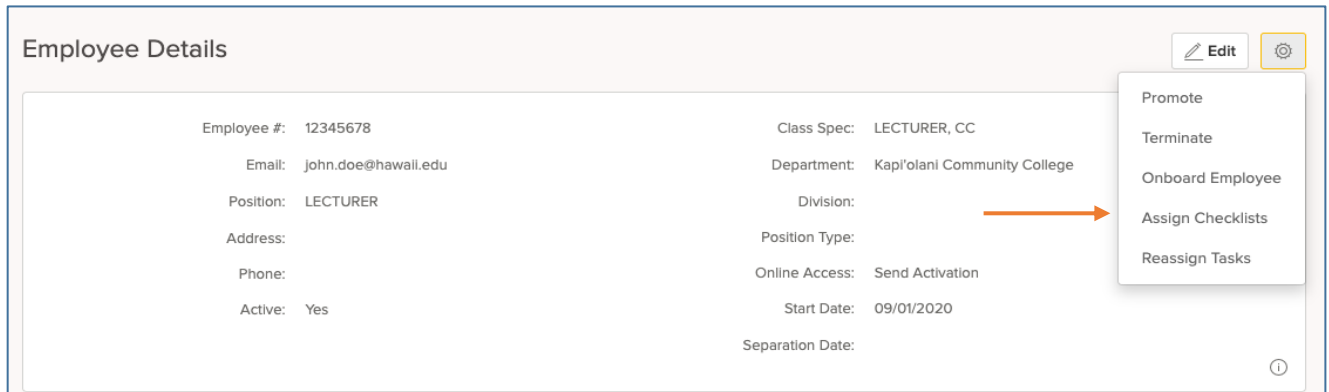


3. The Employee Details page will appear. Select the “gear” icon located in the right corner of the screen.



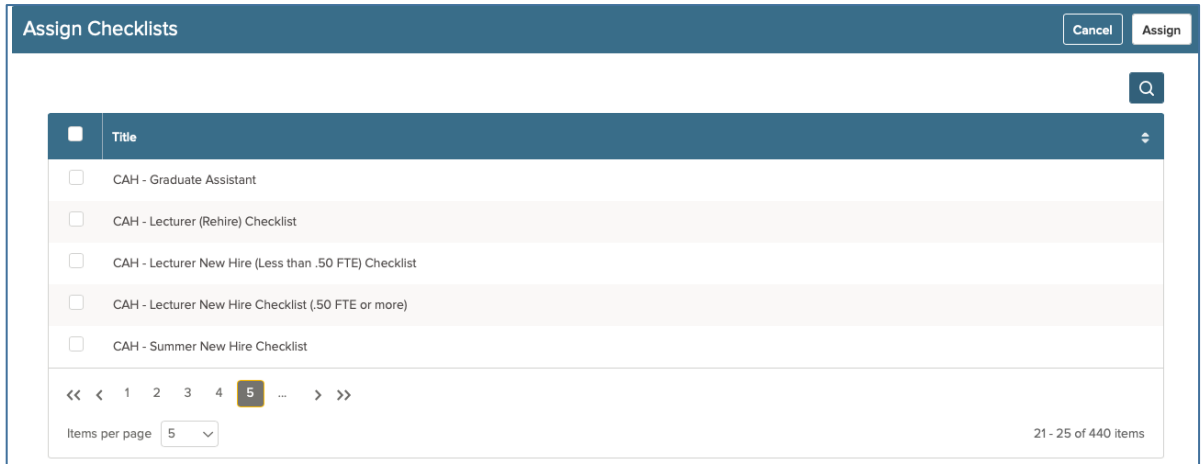
The screenshot shows the 'Employee Details' page. The title 'Employee Details' is at the top left. In the top right corner, there are two icons: an 'Edit' icon (pencil) and a gear icon. The gear icon is circled in red. Below the title bar, the employee information is displayed in two columns. The left column contains: Employee #: 12345678, Email: john.doe@hawaii.edu, Position: LECTURER, Address:, Phone:, and Active: Yes. The right column contains: Class Spec: LECTURER, CC, Department: Kapl'olani Community College, Division:, Position Type:, Online Access: Send Activation, Start Date: 09/01/2020, and Separation Date:.

4. A dropdown menu will appear. Select “Assign Checklists”.



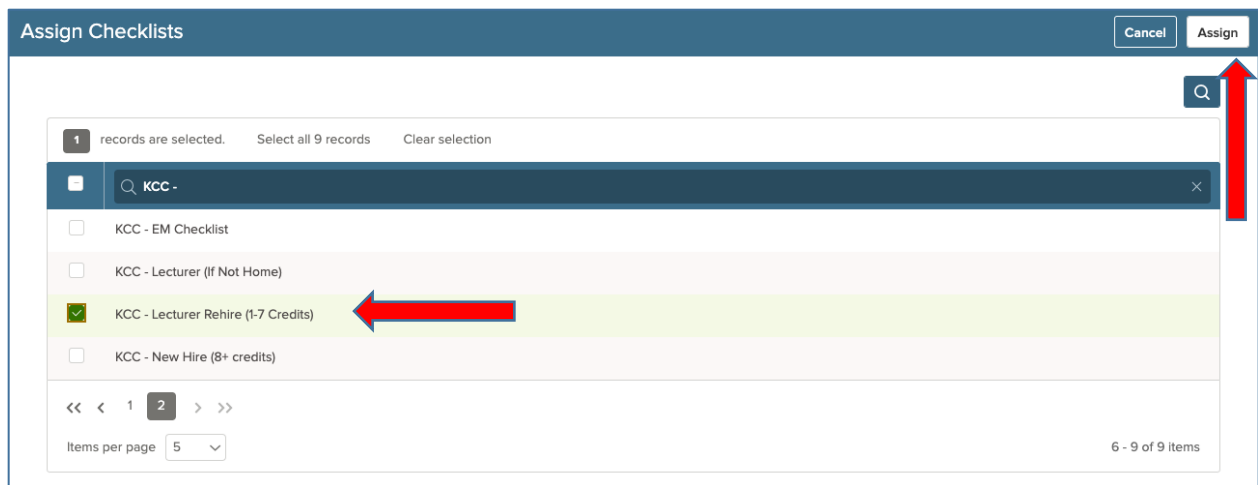
The screenshot shows the 'Employee Details' page with the gear icon dropdown menu open. The menu options are: Promote, Terminate, Onboard Employee, Assign Checklists, and Reassign Tasks. An orange arrow points to the 'Assign Checklists' option. The rest of the page content is identical to the previous screenshot.

- The “Assign Checklists” pop up window will appear listing all the checklists in the system.

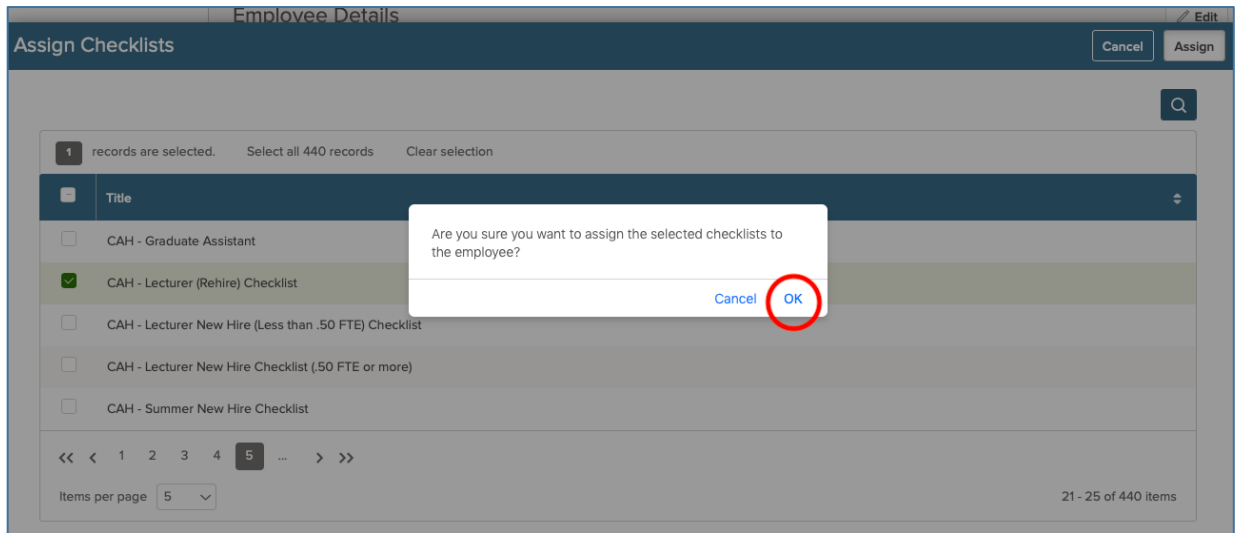


- Click on “magnifying glass” icon and type the checklist you are looking for. Check the box(es) next to the checklists being assigned to the new hire. Then click “Assign” located at the top right corner. (Refer [Checklist Chart](#) at the end of this manual)

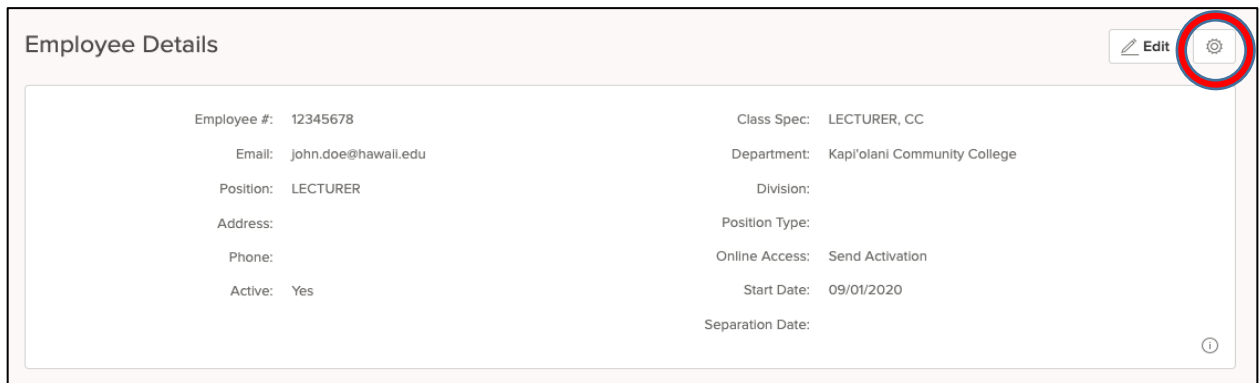
NOTE: If the checklist has already been assigned to the new hire or the checklist is blank, the checklist will not appear in the “Assign Checklists” pop up window.



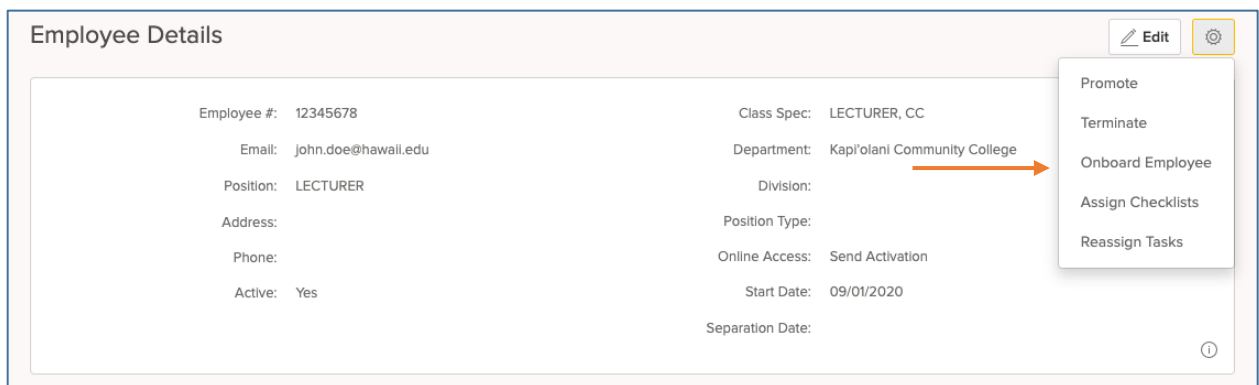
7. Click "OK" from the popup window.



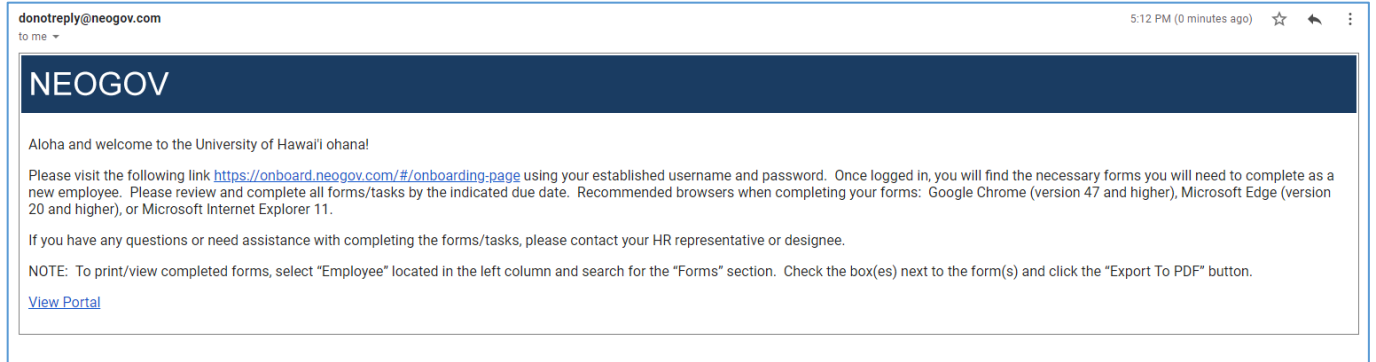
8. Then, select the "gear" icon again located at the top right portion of the screen



9. From the dropdown menu, select "Onboard Employee".



10. This will assign the Employment Eligibility Verification (Form I-9) checklist to the new hire and will also trigger an auto generated email informing them to begin the onboarding process.



To Lock/Unlock Forms

Recommendation: Forms should be locked once they are completed. This will prevent the new hire from amending the forms and allows the new hire to have “Read Only” access.

1. Click “Employees” located top left corner of page. The list of employees in your department/division will display. Select the employee by clicking the “Employee #”, “Last Name” or “First Name”.
2. The “Employee Details” page will appear.

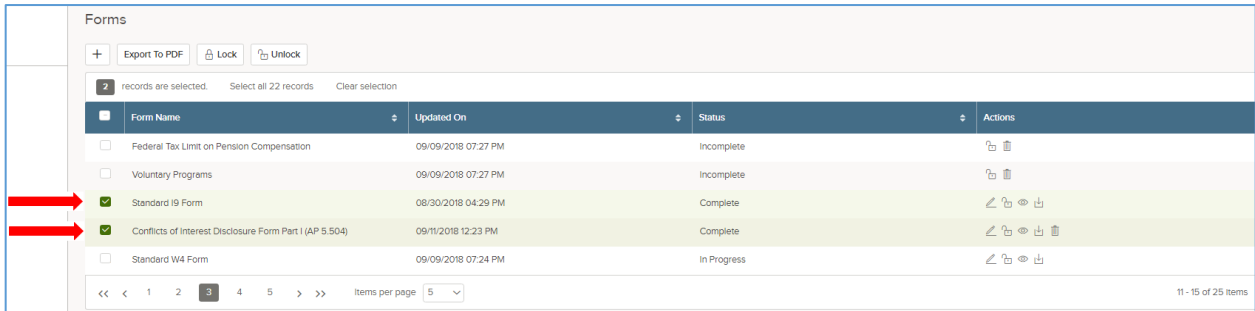
The screenshot shows the NEOGOV Onboard interface. The top navigation bar includes 'NEO GOV', 'Onboard', a search bar, and a user profile for 'Darsh Dave'. Below the navigation bar are tabs for 'Employees', 'Pre-Hires', 'Reports', 'Completed Forms', 'Checklists', and 'Positions'. The main content area is titled 'Employee Details' and features a profile card for 'John Doe' (LECTURER) on the left. The right side contains a form with the following fields: Employee #: 12345678, Email: john.doe@hawaii.edu, Position: LECTURER, Address, Phone, Active: Yes, Class Spec: LECTURER, CC, Department: Kapi'olani Community College, Division, Position Type, Online Access: Send Activation, Start Date: 09/01/2020, and Separation Date. An 'Edit' button is visible in the top right corner of the details section.

3. Scroll down and navigate to the “Forms” section (bottom of the page).

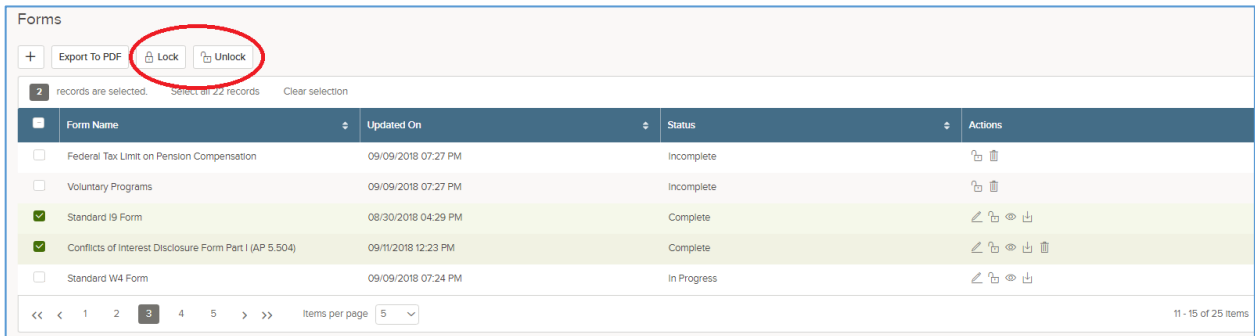
The screenshot shows the 'Forms' section of the NEOGOV Onboard system. It includes a table with columns for 'Form Name', 'Updated On', 'Status', and 'Actions'. The table contains five rows of form data. Above the table are buttons for '+', 'Export To PDF', 'Lock', and 'Unlock'. Below the table is a pagination control showing '11 - 15 of 25 Items' and a dropdown for 'Items per page' set to 5. An 'ACCESSIBILITY TOOLS' link is located at the bottom left of the section.

Form Name	Updated On	Status	Actions
<input type="checkbox"/> Federal Tax Limit on Pension Compensation	09/09/2018 07:27 PM	Incomplete	
<input type="checkbox"/> Voluntary Programs	09/09/2018 07:27 PM	Incomplete	
<input type="checkbox"/> Standard I9 Form	08/30/2018 04:29 PM	Complete	
<input type="checkbox"/> Conflicts of Interest Disclosure Form Part I (AP 5.504)	09/11/2018 12:23 PM	Complete	
<input type="checkbox"/> Standard W4 Form	09/09/2018 07:24 PM	In Progress	

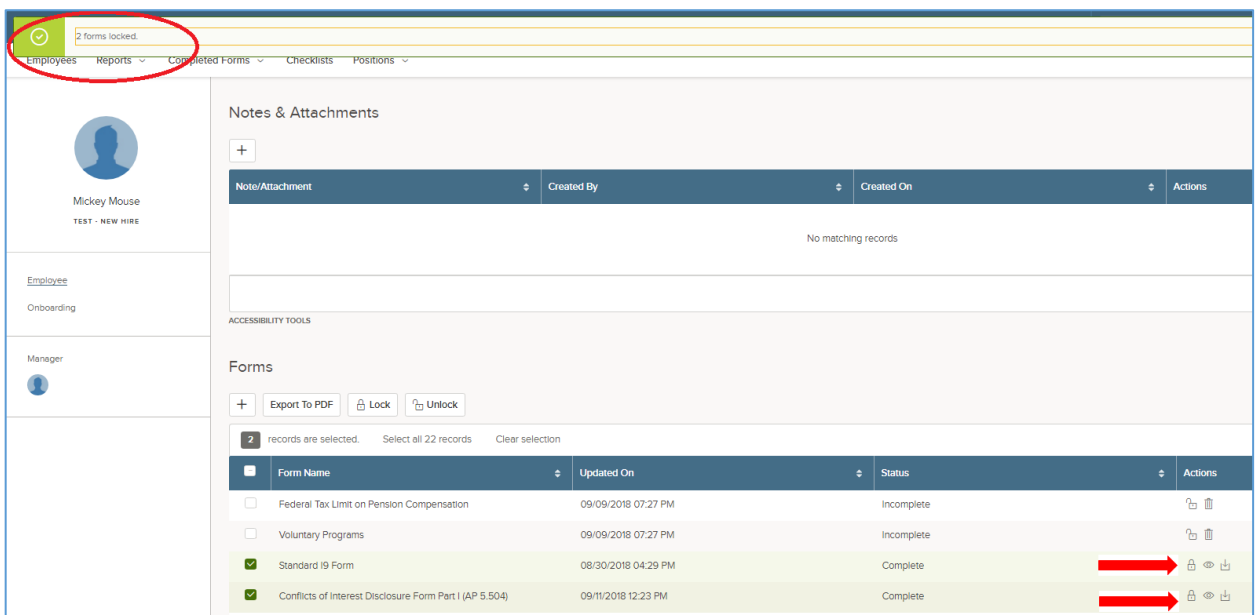
4. Check the box(es) next to the name(s) of the form(s) that need to be locked or unlocked.



5. After selecting the form(s), click the “Lock” or “Unlock” button.

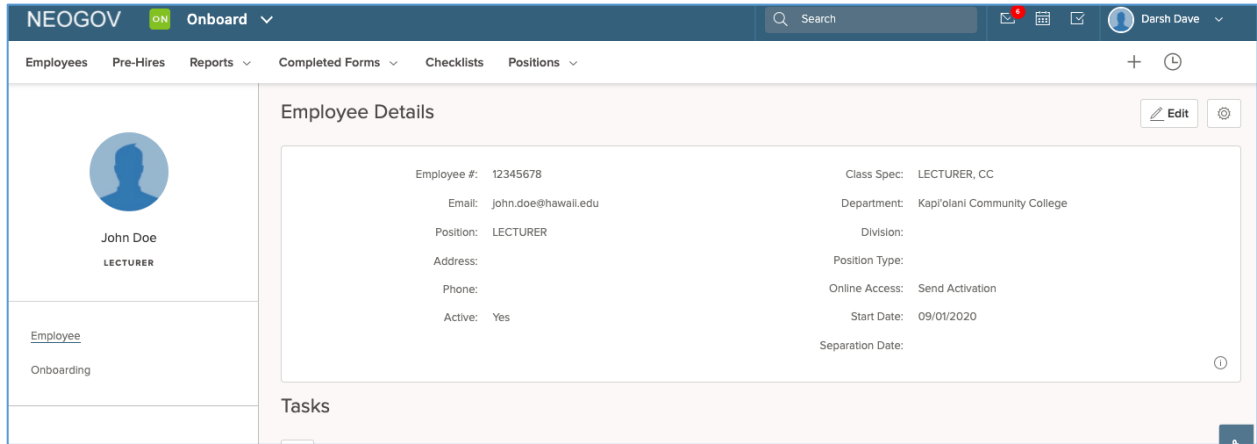


6. A confirmation will appear. If the “Lock” button is selected, the lock icon in the “Actions” column will also change.

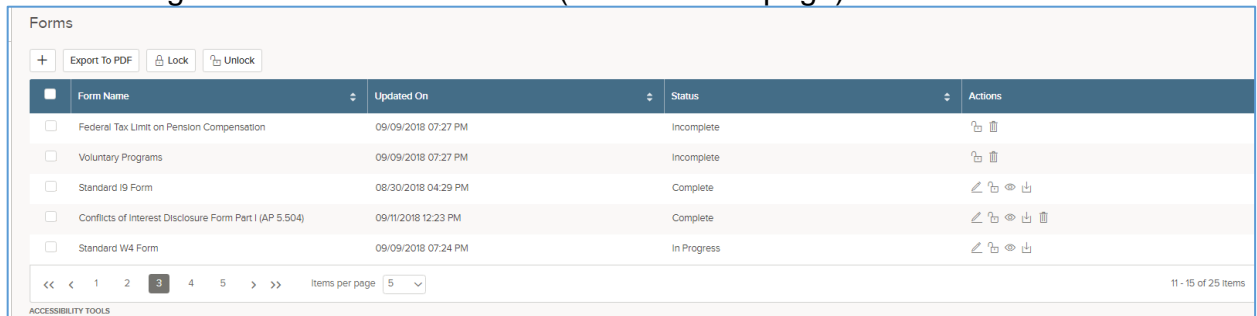


To Update/Edit/Delete Forms

1. Click “Employees” located top left corner of page.
2. The list of employees in your department/division will display. Select the employee by clicking either the “Employee #”, “Last Name” or “First Name”.
3. The “Employee Details” page will appear.






4. Navigate to the “Forms” section (bottom of the page).



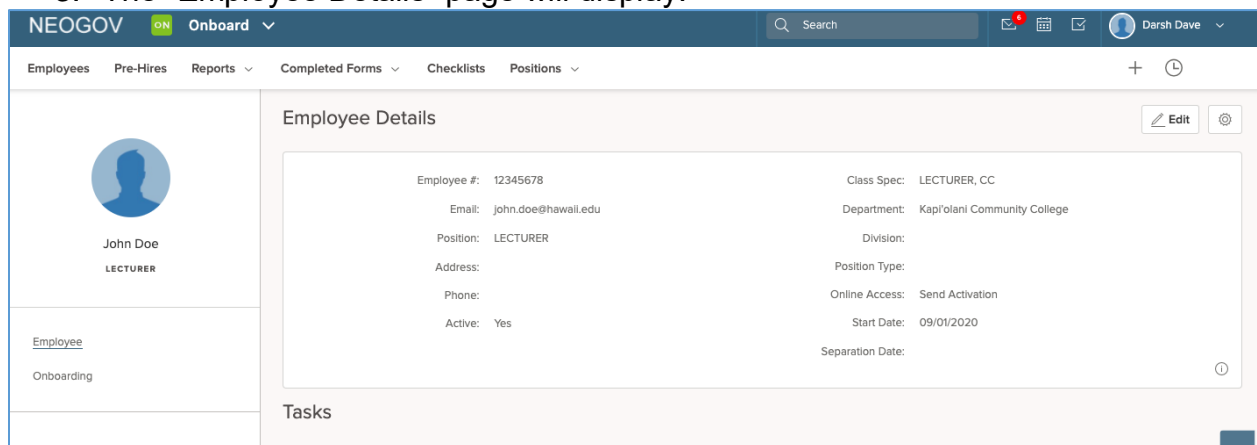
5. Depending on the status of the form, the following functions will be allowed using the icons in the “Actions” column:

ICON	FUNCTION
	Update/edit form (e-sign, input EIN, department address, etc.)
	Lock/unlock form. RECOMMENDATION: lock forms once status changes to “Complete”. This will prevent the new hire from amending forms and allows them to have read only access.

	View form as a PDF.
	Download form as a PDF. Ability to print once downloaded.
	Delete form. This will permanently delete the form from the new hire's Forms section.

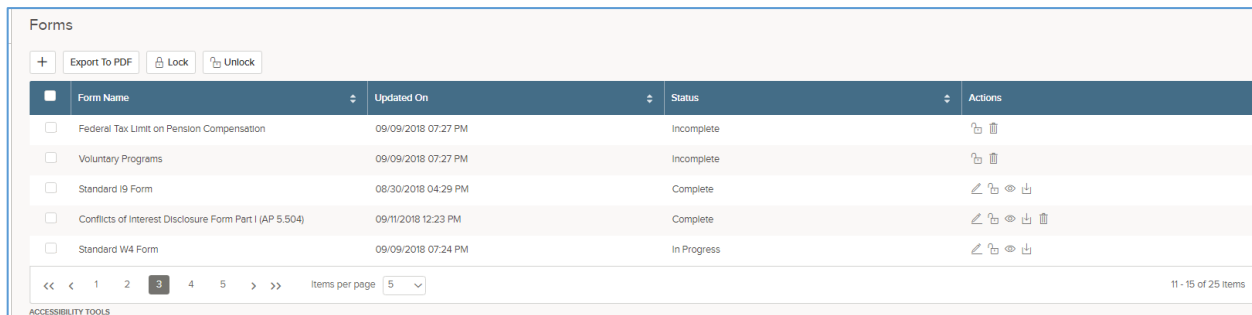
To Download/Print Forms (Status of form(s) must be "Complete")

1. Click "Employees" located top left corner of page.
2. The list of employees in your department/division will display. Select the employee by clicking either the "Employee #", "Last Name" or "First Name".
3. The "Employee Details" page will display.




The screenshot shows the NEOGOV Onboard interface. The top navigation bar includes "NEO GOV", "Onboard", a search bar, and a user profile for "Darsh Dave". The main menu has options for "Employees", "Pre-Hires", "Reports", "Completed Forms", "Checklists", and "Positions". The "Employee Details" page for John Doe (Employee # 12345678) is displayed, showing fields for Class Spec (LECTURER, CC), Department (Kap'olani Community College), Position (LECTURER), Address, Phone, Active status (Yes), Online Access (Send Activation), Start Date (09/01/2020), and Separation Date. A "Tasks" section is visible at the bottom.

4. Locate the "Forms" section



The screenshot shows the "Forms" section of the NEOGOV Onboard system. It features a table with columns for "Form Name", "Updated On", "Status", and "Actions". The table lists five forms: "Federal Tax Limits on Pension Compensation" (Incomplete), "Voluntary Programs" (Incomplete), "Standard I9 Form" (Complete), "Conflicts of Interest Disclosure Form Part I (AP 5.504)" (Complete), and "Standard W4 Form" (In Progress). The "Actions" column contains icons for viewing, editing, deleting, and locking/unlocking forms. The interface includes a search bar, "Export To PDF", "Lock", and "Unlock" buttons, and a pagination control showing "11 - 15 of 25 items".

a. To individually print a form:

- i. Click the “Download” icon  located in the “Actions” column
- ii. Once the form converts to a PDF, the form can be printed

Forms

Export to ...

<input type="checkbox"/>	Form Name	Updated On	Status	Actions
<input type="checkbox"/>	(UH Form 27, rev 7/2009) EEO/AA Ethnic Backgrou...	06/25/2020 02:35 PM	Complete	<input type="button" value="Print"/> <input type="button" value="Download"/> <input type="button" value="Share"/>
<input type="checkbox"/>	(UH Form 22, Rev 10/2006) Work Schedule Disclos...	06/25/2020 02:40 PM	Complete	<input type="button" value="Print"/> <input type="button" value="Download"/> <input type="button" value="Share"/>
<input type="checkbox"/>	(FORM) Employment and Benefit Related Notices (R...	06/25/2020 02:44 PM	Complete	<input type="button" value="Print"/> <input type="button" value="Download"/> <input type="button" value="Share"/>
<input type="checkbox"/>	UH Form 92 (11/30/2007) UH General Confidentialit...	06/25/2020 02:45 PM	Complete	<input type="button" value="Print"/> <input type="button" value="Download"/> <input type="button" value="Share"/>
<input type="checkbox"/>	KCC Request-for-Faculty-Staff-ID-Card-Human-Reso...	06/25/2020 02:48 PM	Complete	<input type="button" value="Print"/> <input type="button" value="Download"/> <input type="button" value="Share"/>

<< < 1 2 3 > >> Items per page 5 1 - 5 of 12 items

b. To print multiple forms:

- i. Check the boxes next to the applicable form names
- ii. Click the “Export TO PDF” button (*may take some time to download*)
- iii. Forms will download into a ZIP folder and can be printed from there

Forms

Export to ...

Export to PDF

<input checked="" type="checkbox"/>	Form Name	Updated On	Status	Actions
<input checked="" type="checkbox"/>	(UH Form 27, rev 7/2009) EEO/AA Ethnic Backgrou...	06/25/2020 02:35 PM	Complete	<input type="button" value="Print"/> <input type="button" value="Download"/> <input type="button" value="Share"/>
<input checked="" type="checkbox"/>	(UH Form 22, Rev 10/2006) Work Schedule Disclos...	06/25/2020 02:40 PM	Complete	<input type="button" value="Print"/> <input type="button" value="Download"/> <input type="button" value="Share"/>
<input checked="" type="checkbox"/>	(FORM) Employment and Benefit Related Notices (R...	06/25/2020 02:44 PM	Complete	<input type="button" value="Print"/> <input type="button" value="Download"/> <input type="button" value="Share"/>
<input checked="" type="checkbox"/>	UH Form 92 (11/30/2007) UH General Confidentialit...	06/25/2020 02:45 PM	Complete	<input type="button" value="Print"/> <input type="button" value="Download"/> <input type="button" value="Share"/>
<input checked="" type="checkbox"/>	KCC Request-for-Faculty-Staff-ID-Card-Human-Reso...	06/25/2020 02:48 PM	Complete	<input type="button" value="Print"/> <input type="button" value="Download"/> <input type="button" value="Share"/>

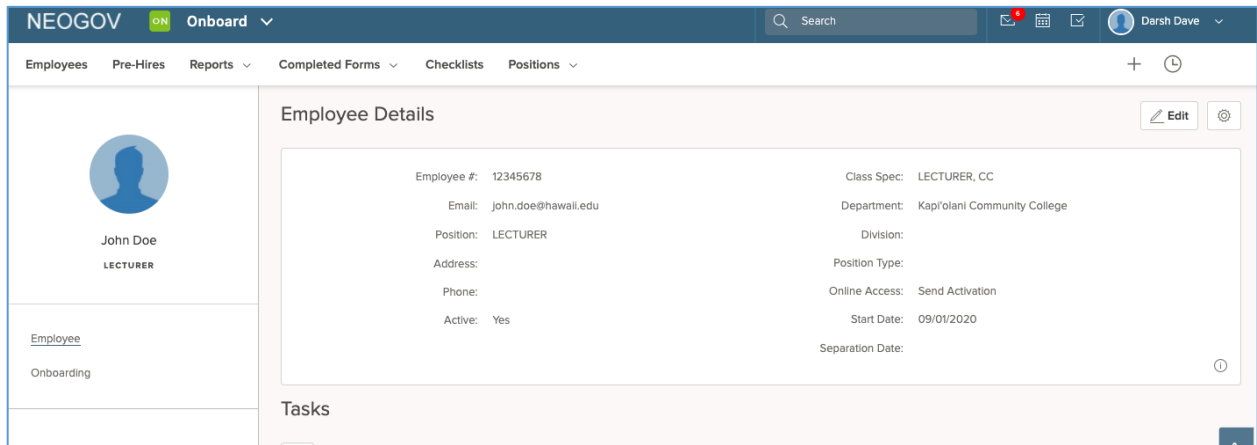
<< < 1 2 3 > >> Items per page 5 1 - 5 of 12 items



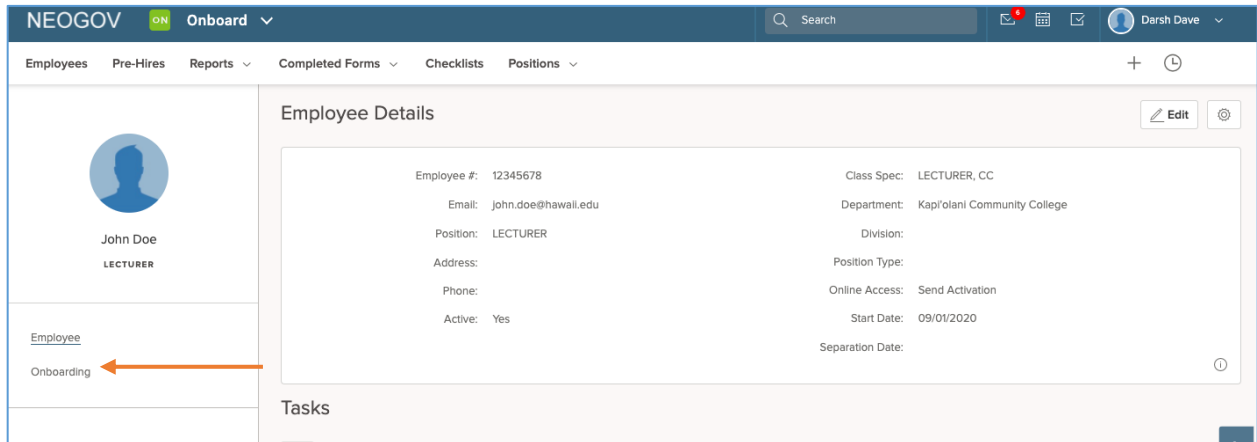
Forms_20200713_1...zip

To Delete/Reassign Checklist

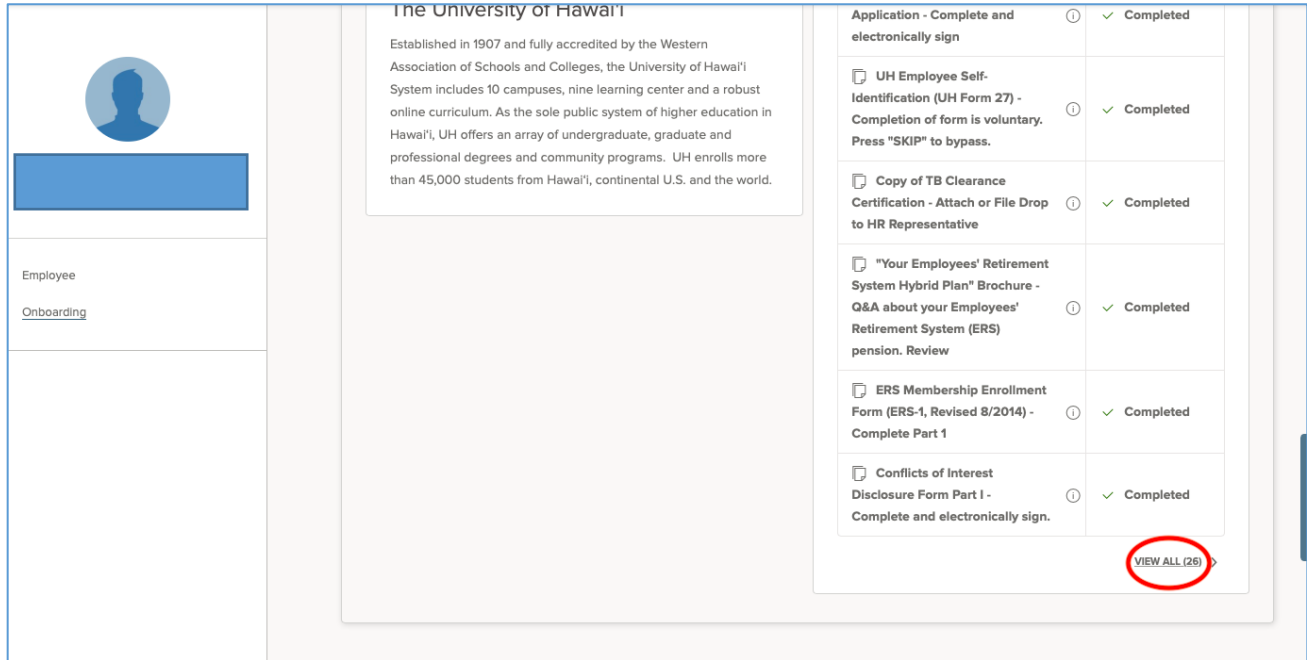
1. Click Employees located top left corner of page.
2. The list of employees in your department/division will display. Select the employee by clicking either the “Employee #”, “Last Name” or “First Name”.
3. The “Employee Details” page will appear.



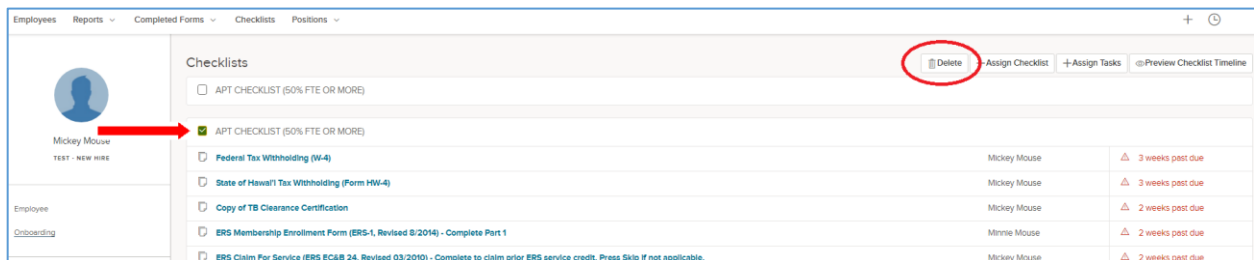
4. Select “Onboarding” located in the left column.



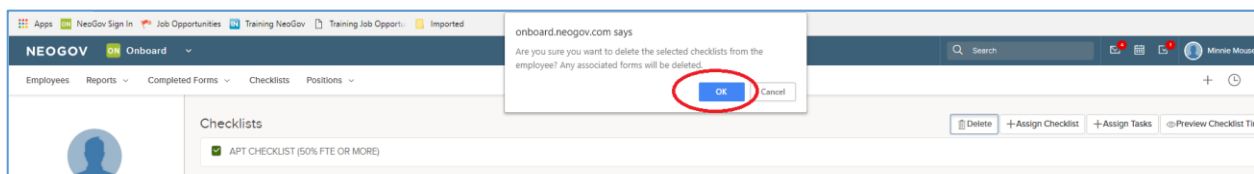
5. Select “View All” located bottom right corner under the title “Checklist”.



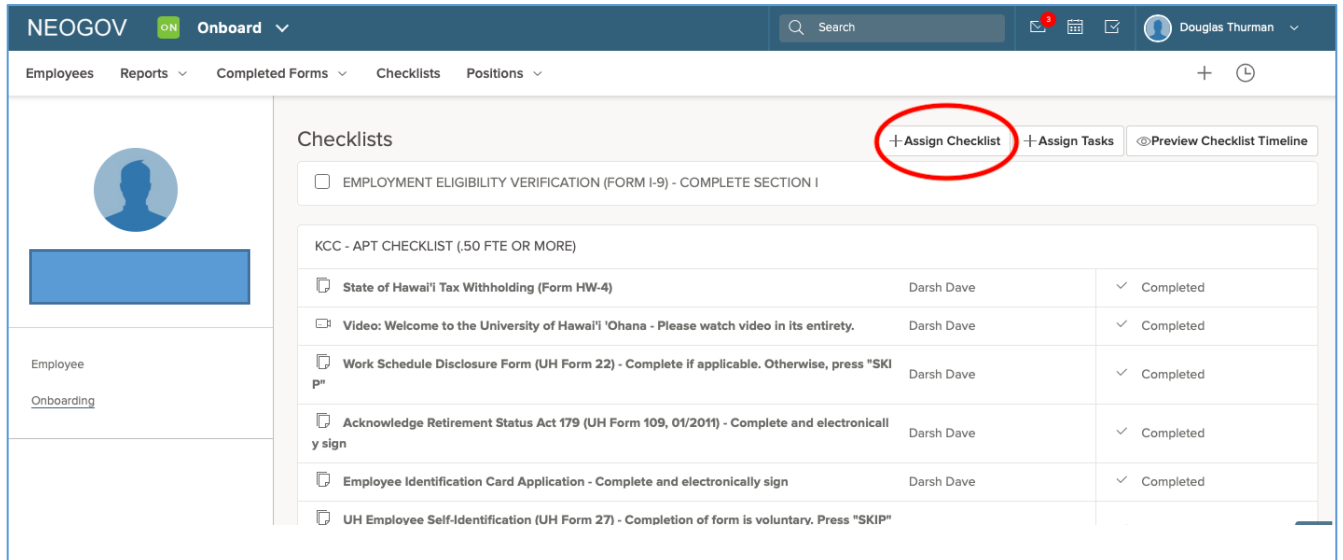
6. The “Checklists” page will appear. Select the check box next to the name of the checklist and click the “Delete” button located at the top right.



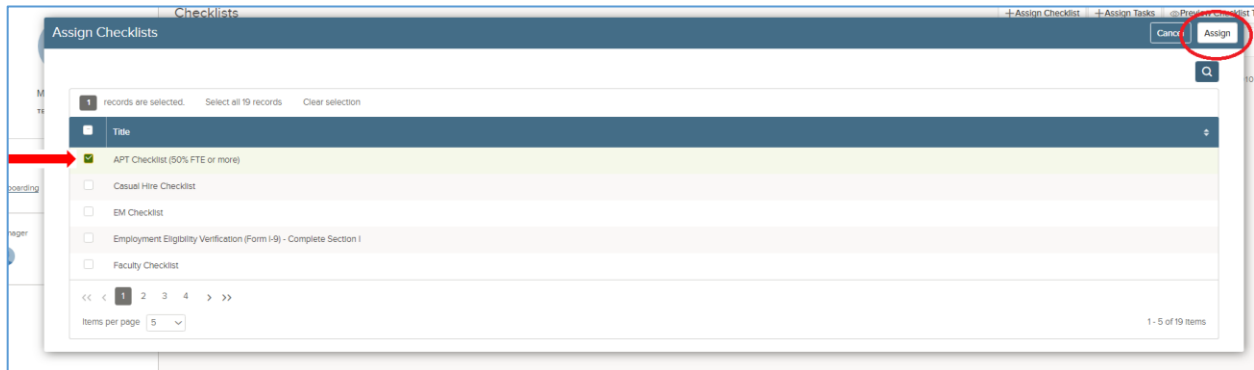
7. A confirmation message box will appear. Select “OK”.



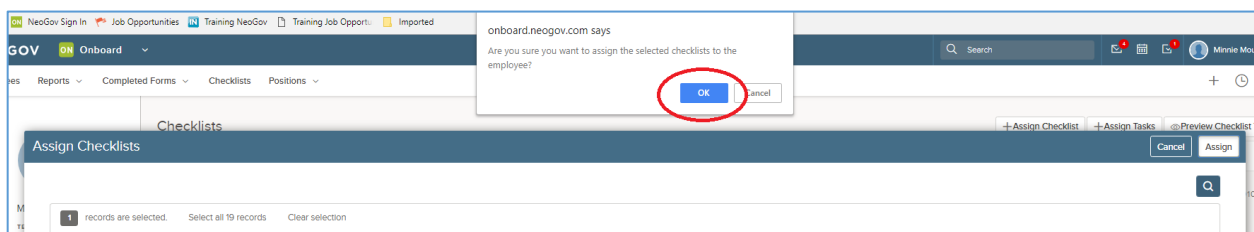
8. To reassign a checklist (if applicable), select the “+Assign Checklist” button located top right.



9. The “Assign Checklists” page will appear. Select the check box next to the name of the checklist you wish to reassign and then click “Assign” located top right. (Refer [Checklist Chart](#) at the end of this manual)



10. A confirmation message box will appear. Select “OK”.



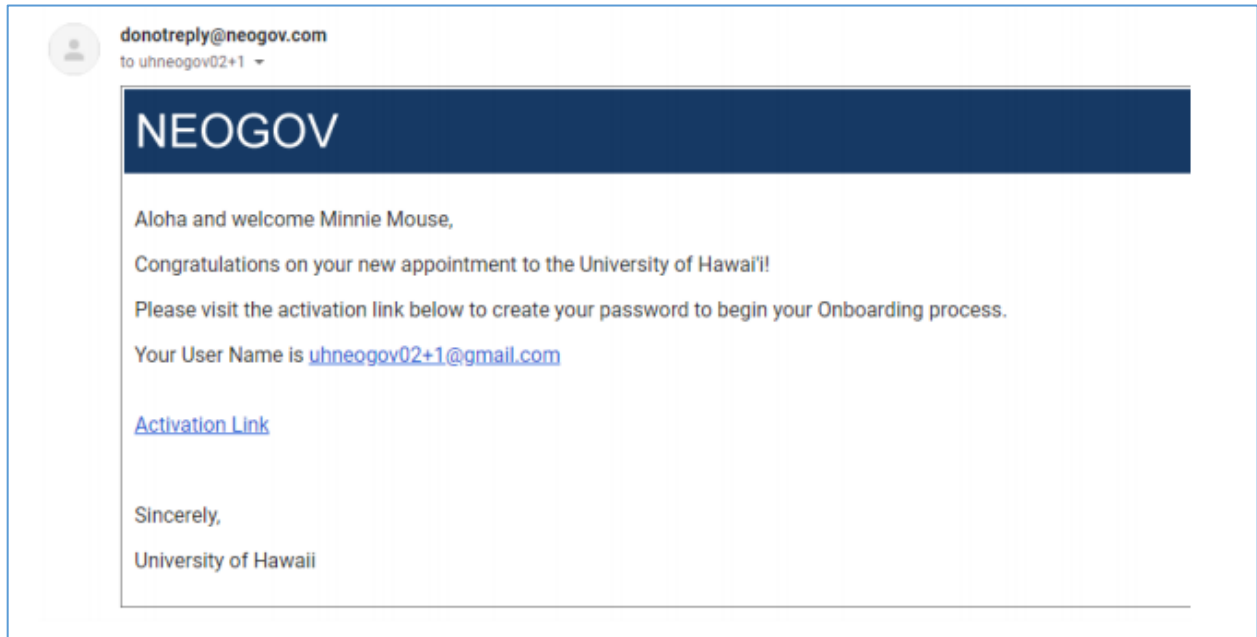
11. The reassigned checklist will populate on the new hire's "Checklists" page reflecting the updated start date.

The screenshot shows a user interface for a 'Checklists' page. On the left, there is a profile card for 'Mickey Mouse' with the status 'TEST - NEW HIRE'. The main area is titled 'Checklists' and contains a table of tasks. At the top right of the table area, there are buttons for '+ Assign Checklist', '+ Assign Tasks', and 'Preview Checklist Timeline'. The table lists various forms and documents with their respective due dates.

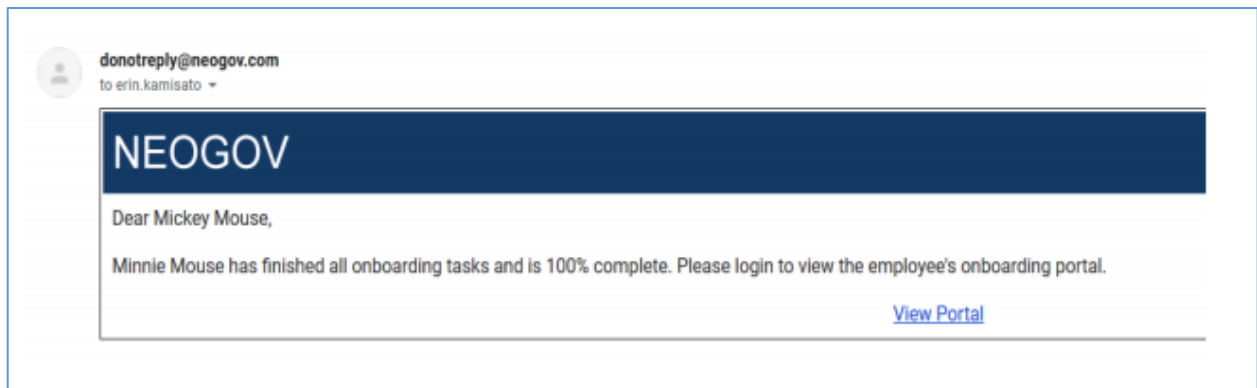
Task	Assignee	Due Date
<input type="checkbox"/> APT CHECKLIST (50% FTE OR MORE)		
<input type="checkbox"/> APT CHECKLIST (50% FTE OR MORE)		
<input checked="" type="checkbox"/> Federal Tax Withholding (W-4)	Mickey Mouse	Due in 3 days
<input checked="" type="checkbox"/> State of Hawaii Tax Withholding (Form HW-4)	Mickey Mouse	Due in 3 days
<input checked="" type="checkbox"/> Copy of TB Clearance Certification	Mickey Mouse	Due in 1 week
<input checked="" type="checkbox"/> "Your Employees' Retirement System Hybrid Plan" Brochure - Q&A about your Employees' Retirement System (ERS) pension	Mickey Mouse	Due in 1 week
<input checked="" type="checkbox"/> ERS Membership Enrollment Form (ERS-1, Revised 8/2014) - Complete Part 1	Mickey Mouse	Due in 1 week
<input checked="" type="checkbox"/> ERS Claim For Service (ERS EC&B 24, Revised 03/2010) - Complete to claim prior ERS service credit. Press Skip if not applicable.	Mickey Mouse	Due in 1 week
<input checked="" type="checkbox"/> Acknowledge Retirement Status Act 179 (JH Form 109, 01/2011) - Complete and sign	Mickey Mouse	Due in 1 week
<input checked="" type="checkbox"/> Conflicts of Interest Disclosure Form Part I	Mickey Mouse	Due in 1 week

Sample Email Messages

1. When the “Send Activation” box is checked on the “Edit Employee” page and/or the “Send Activation” link is selected, the following email is sent to the new hire:



2. When the user completes their checklist, you will receive the following email:



Position Chart (Lecturer Hire)

Position Control Number	Department
LECT 01 - KCC	Kapi'olani Community College
LECT 02 - KCC	Kapi'olani Community College
LECT 01 - KCC AH	Kapi'olani Community College - Arts & Humanities
LECT 01 - KCC LLL	Kapi'olani Community College - Languages, Linguistics & Literature
LECT 01 - KCC SS	Kapi'olani Community College - Social Science
LECT 01 - KCC MS	Kapi'olani Community College - Math & Science
LECT 01 - KCC BLTA	Kapi'olani Community College - Business Legal & Technology - Accounting
LECT 01 - KCC BLT	Kapi'olani Community College - Business Legal & Technology
LECT 01 - KCC BLTICS	Kapi'olani Community College - Business Legal & Technology - Information & Computer Science
LECT 01 - KCC BLTLAP	Kapi'olani Community College - Business Legal & Technology - Legal Academic Program
LECT 01 - KCC CUL	Kapi'olani Community College - Culinary
LECT 01 - KCC HT	Kapi'olani Community College - Hospitality & Tourism
LECT 01 - KCC HS	Kapi'olani Community College - Health Sciences
LECT 01 - KCC HSDA	Kapi'olani Community College - Health Sciences - Dental Assisting
LECT 01 - KCC HSMA	Kapi'olani Community College - Health Sciences - Medical Assisting
LECT 01 - KCC HSMLT	Kapi'olani Community College - Health Sciences - Medical Laboratory Technician
LECT 01 - KCC HSOT	Kapi'olani Community College - Health Sciences - Occupational Therapy
LECT 01 - KCC HSRT	Kapi'olani Community College - Health Sciences - Radiologic Technician
LECT 01 - KCC HSPT	Kapi'olani Community College - Health Sciences - Physical Therapy
LECT 01 - KCC HSRC	Kapi'olani Community College - Health Sciences - Respiratory Care
LECT 01 - KCC EMS	Kapi'olani Community College - Emergency Medical Services
LECT 01 - KCC NUR	Kapi'olani Community College - Nursing
LECT 01 - KCC OSA	Kapi'olani Community College - Office for Student Affairs

Position Chart (Casual Hire)

Position Control Number	Department
CAS 01 - KCC	Kapi'olani Community College
CAS 02 - KCC	Kapi'olani Community College
CAS 01 - KCC AH	Kapi'olani Community College - Arts & Humanities
CAS 01 - KCC LLL	Kapi'olani Community College - Languages, Linguistics & Literature
CAS 01 - KCC SS	Kapi'olani Community College - Social Science
CAS 01 - KCC MS	Kapi'olani Community College - Math & Science
CAS 01 - KCC BLT	Kapi'olani Community College - Business Legal & Technology
CAS 01 - KCC BLTA	Kapi'olani Community College - Business Legal & Technology - Accounting
CAS 01 - KCC BLTICS	Kapi'olani Community College - Business Legal & Technology - Information & Computer Science
CAS 01 - KCC BLTLAP	Kapi'olani Community College - Business Legal & Technology - Legal Academic Program
CAS 01 - KCC CUL	Kapi'olani Community College - Culinary
CAS 01 - KCC HT	Kapi'olani Community College - Hospitality & Tourism
CAS 01 - KCC HS	Kapi'olani Community College - Health Sciences
CAS 01 - KCC HSDA	Kapi'olani Community College - Health Sciences - Dental Assisting
CAS 01 - KCC HSMA	Kapi'olani Community College - Health Sciences - Medical Assisting
CAS 01 - KCC HSMLT	Kapi'olani Community College - Health Sciences - Medical Laboratory Technician
CAS 01 - KCC HSOT	Kapi'olani Community College - Health Sciences - Occupational Therapy
CAS 01 - KCC HSPT	Kapi'olani Community College - Health Sciences - Physical Therapy
CAS 01 - KCC HSRC	Kapi'olani Community College - Health Sciences - Respiratory Care
CAS 01 - KCC HSRT	Kapi'olani Community College - Health Sciences - Medical Laboratory Technician
CAS 01 - KCC EMS	Kapi'olani Community College - Emergency Medical Services
CAS 01 - KCC NUR	Kapi'olani Community College - Nursing
CAS 01 - KCC SEC	Kapi'olani Community College - Security
CAS 01 - KCC OAS	Kapi'olani Community College - Office for Administrative Services
CAS 01 - KCC BO	Kapi'olani Community College - Business Office
CAS 01 - KCC ASFM	Kapi'olani Community College - Auxiliary Services & Facilities Management
CAS 01 - KCC HR	Kapi'olani Community College - Human Resources
CAS 01 - KCC OSA	Kapi'olani Community College - Office for Student Affairs
CAS 01 - KCC KISC	Kapi'olani Community College - Kelaulike Information & Service Center
CAS 01 - KCC CO	Kapi'olani Community College - Chancellor's Office
CAS 01 - KCC CELTT	Kapi'olani Community College - Center for Excellence in Learning, Teaching and Technology
CAS 01 - KCC OAA	Kapi'olani Community College - Office for Academic Affairs
CAS 01 - KCC OCET	Kapi'olani Community College - Continuing Education

Checklist Chart

- KapCC - Lecturer New Hire (1-7 TEs)
- KapCC - Lecturer New Hire (8 or more TEs)
- KapCC - Lecturer Re-Hire (1-7 TEs)
- KapCC - Lecturer Re-Hire (8 or more TEs)
- KapCC – Year-Round Lecturer Re Hire (8 or more TEs)
- KapCC - Lecturer (If Not HomeBase)
- KapCC - Casual Hire Checklist (*for Summer Lecturers and Casual hires*)
- KapCC - (11-mo & 9-mo) Faculty Checklist
- KapCC - APT Checklist (.50 FTE or more)