Enterprise Onboarding and Checklists

Q&A 5/4/2020

1. In your opinion, how configurable and flexible is the onboarding configuration to match a company process? Is there a workflow where you can build conditions for the workflow to follow certain paths depending on whether conditions are met?

   Response: Onboarding and the Checklist functionality is not built on a business process flow. Onboarding is constructed and generated by the following events: HR Action (i.e. Hire, Add Pending Worker), Eligibility Profile which determines the employee types that participate in the Onboarding process and the new hire's start date (when the Onboarding Checklists are available to the new hire to complete. You can set the number days when the Checklist is allocated/available to the new hire to complete and set the number of days that they have to complete the checklist.

2. Can onboarding templates be defined with a context (like location) or is does a new checklist need to be defined for each location that has different requirements?

   Response: It depends on the scenario if you would need a separate Onboarding Checklist for a specific Location(s). If the Location has a significant difference in the tasks that need to be completed by the new hire then it might necessitate a separate Onboarding Checklist. If there are tasks that are a few specific tasks that only the Location completes you can create an Eligibility Profile for that Location and the new hires in that Location will only have to complete those tasks.

3. How is the new hire accessing the Me > Onboarding portal before their first day on Payroll?

   Response: There is a delivered process in place that allows a new hire that is set as a "Pending Worker" to populate their home address as their work email and assign a security role "Pending Worker". The "Pending Worker" role gives access to the new hire to Onboarding only so they can complete any preboarding activities. The following Oracle HCM Cloud documentation outlines the steps and process to enable Preboarding access: Release 20A Implementing Global Human Resources Chapter 11 Checklists – How You Enable Access for Preboarding:

   https://docs.oracle.com/en/cloud/saas/human-resources/20a/faigh/index.html

4. In Onboarding, is it possible to trigger notifications (let's say to benefits team or a mailbox), once the check list item is complete?
   Response: Yes, a notification can be sent to a task owner when a task is assigned, completed, canceled or re-assigned. A Task Owner is assigned to each task and there are currently 4 task owner types: Line Manager, Initiator of the task (typically the HR Specialist that manages Onboarding), Area of Responsibility (i.e. Payroll representative, HR representative, etc.) or User which can be a specific employee or you can set up a security user account for a general mailbox for payroll, benefits, Learning, IT, Help Desk, or other interested party.

5. Are there other verification vendors, other than HireRight, that are supported by Oracle Onboarding?
   Response: HireRight and DocuSign have pre-built delivered configuration and integration to work within HCM Cloud. You should be able to configure additional integrations to other vendors. Let us know which other vendors you are working with.

6. If a manager reassigns a task, is there a way to restricted to whom he can reassign the task to?
   Response: As delivered the manager can assign the task to anyone in the organization. A custom role would have to be configured to limit who the manager can select to reassign a task.

7. Sorry if I missed it, can the HR Specialist take over a task and complete it on behalf of another Onboarding participant? Would this be done through a 'reassign task'?

   Response:

   HR Specialist <u>cannot</u> Complete a Task on behalf of a new hire or new hire's manager if the task requires an Electronic Signature.

   The HR Specialist can Complete a Task on behalf of the new hire or new hire's manager for the following Task Types:

   - Manual or Information Task – mark the task Complete
   - Questionnaire
     - The HR Specialist can complete the Questionnaire items and mark the task Complete
   - Application (i.e. employee self service transactions; Direct Deposit, W-4, Emergency Contact, etc.)
     - The HR Specialist can mark the task Complete but they cannot update the actual self-service transaction

8. How does a pending worker login to Onboarding to complete checklist if a customer is using SSO?

   Response: The following Oracle HCM Cloud documentation outlines the steps and process to enable Preboarding access: Release 20A Implementing Global Human Resources Chapter 11 Checklists – How You Enable Access for Preboarding:

   https://docs.oracle.com/en/cloud/saas/human-resources/20a/faigh/index.html

9. Where can we get this configuration Guide, i.e., excel sheet showing on screen now?
   We have a very basic template – but it is customer specific. Let us know if we can assist with your Onboarding Design.

10. Can the task start date set up dynamic?
    Response: Onboarding is constructed and generated by the following events: HR Action (i.e. Hire, Add Pending Worker), Eligibility Profile which determines the employee types that participate in the Onboarding process and the new hire's start date (when the Onboarding Checklists are available to the new hire to complete. You can set the number days when the Checklist is allocated/available to the new hire to complete and set the number of days that they have to complete the checklist.

    A Task within the Checklist can be delayed and not be available to the new hire until later in the process. For example, you may want the new hire to complete the New Hire Survey at the end of their first week but not before. You can set the Delay Duration to 5 Days so the New Hire Survey is available to them on the 5th day of that week.