



Toronto and Region Conservation Authority (TRCA)

Manager User Guide – Dayforce Onboarding

September 2021

Purpose of Onboarding User Guide - Manager

This user guide will help you understand important features of **Dayforce Onboarding**, including:

- Onboarding Policies
- Getting Started
- Onboarding Employees
- Onboarding Forms
- Onboarding Guide(s)
- Employee Task lists
- Manager Task lists

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Dayforce Onboarding

Onboarding is the process of introducing newly hired employees into an organization. It helps them integrate quickly into an organization by providing immediate support and resources and to enable them to complete required tasks. It also helps them understand their new position and job requirements so that they can quickly become productive in their roles.

Dayforce Onboarding is designed to support TRCA in its onboarding processes. It includes features to help employees and managers:

- Experience a consistent, seamless, and user-friendly onboarding process.
- Understand their individual responsibilities/tasks within the onboarding process and associated timelines to ensure tasks are completed in a timely manner.
- Have access to comprehensive checklists itemized into different timeframes throughout the onboarding process.
- Complete relevant forms and documents in a timely manner.
- Link to resources such as user guides, websites and similar.

Onboarding Policy

An **Onboarding Policy** is a customized collection of informational resources, lists, instructions, and forms that are presented to a new hire.

An onboarding policy includes customized content for both the new hire and their manager.

When an onboarding policy is assigned to a new hire:

- The new hire sees their own customized content.
- The manager sees their own customized content. The manager also has visibility to the listed items in the new hire's policy and related progress.

Three TRCA onboarding policies have been configured in Dayforce and are assigned based on the new hire's employment status. They are:

- Full Time Employees with Benefits
- Temporary Employees, Benefit Eligible upon Completion of 960 Hours
- Temporary Employees, No Benefits

Assignment of Onboarding Policy

Onboarding Policies are assigned at the end of the recruiting process when the Hire form is completed for the candidate. This is handled by the HRBP.

The screenshot shows the 'External Candidate Hire' form in Dayforce. The 'Preview' tab is selected. The 'New Hire' section is active. The 'Personal Details' section includes fields for First Name, Middle Name, Last Name, Preferred First Name, Gender, Marital Status, SIN, SIN Expiry Date, Birth Date, Citizenship, Language, Hire Date, and Onboarding Date. The 'Onboarding Policy' dropdown menu is open, showing three options: 'Permanent Employees - Full Time', 'Temporary Employees - Eligible for Benefits after 960 Hours', and 'Temporary Employees - No Benefits'. The 'Address' section includes fields for Address Line 1, Address Line 2, Address Line 3, City, Province, County, Postal Code, Phone Number Type, Phone Number, Business Email, and Personal Email. A red box highlights the 'Onboarding Policy' dropdown menu.

Onboarding Policy Period

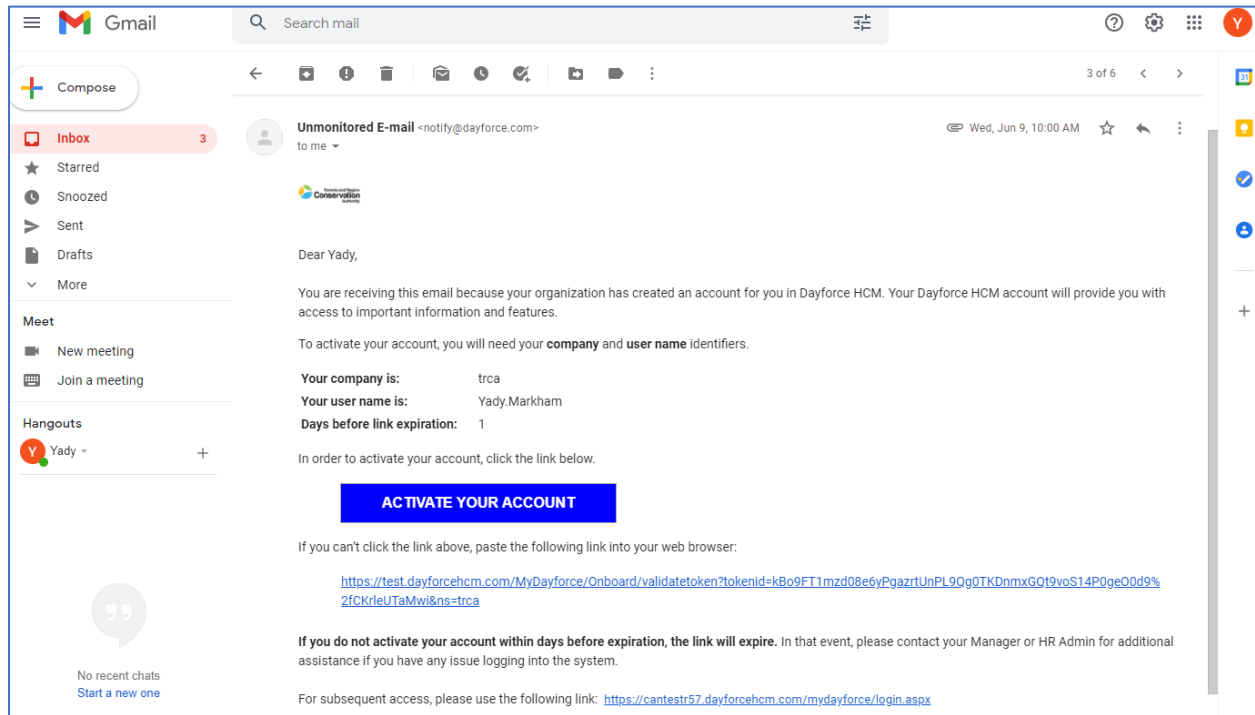
An onboarding policy spans two periods.

Preboarding Period: This refers to the period before a new hire's start date. Policies will be assigned for a 2-week period before the start date, or for an adjusted period if the new hire's start date is less than two weeks away.

Onboarding Period: Once the new hire's start date arrives, their onboarding policy is the same as it was before and it continues to be active for an additional three months after the start date.

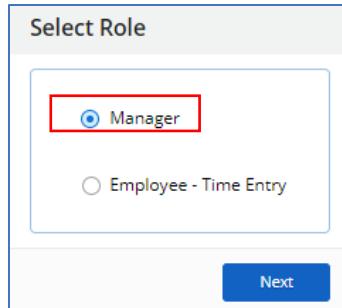
First Time Access Email to Employee

When a Hire form is completed for a candidate, a corresponding **First Time Activation** email is sent to the candidate to their personal email address recorded in their recruiting profile. This is to enable access to Dayforce during **Preboarding** period where they establish a native log in id and password.



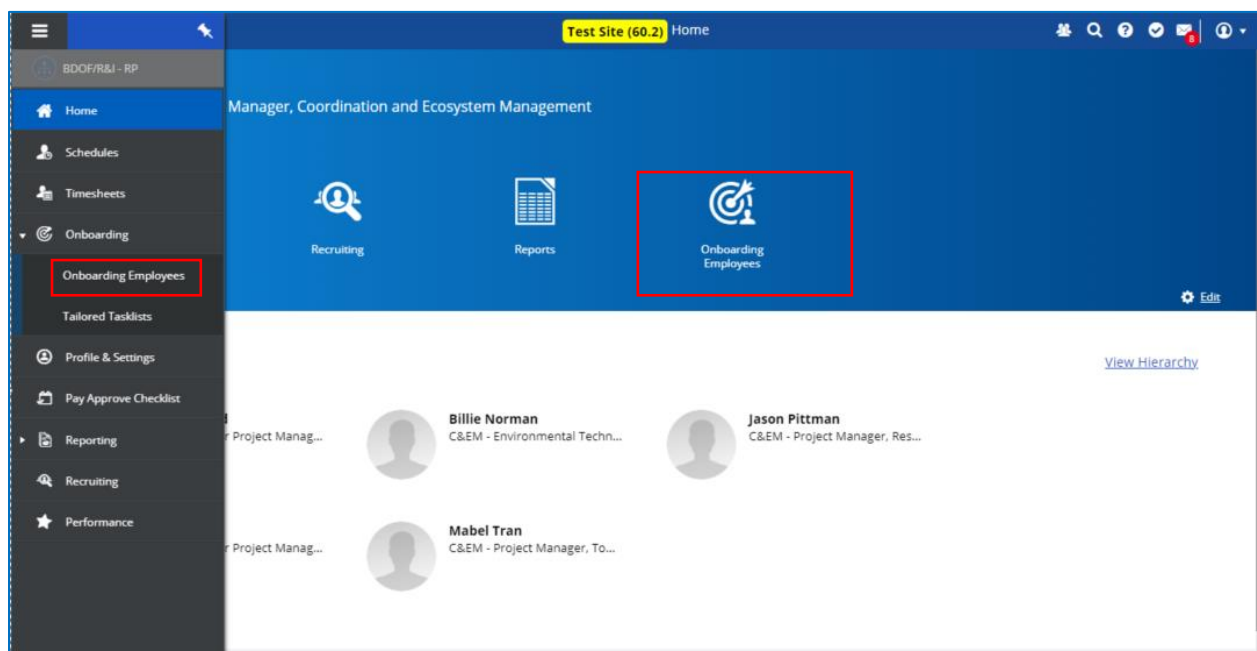
Accessing Onboarding

To access the Onboarding feature for managers, you log into Dayforce under your **Manager** user role.

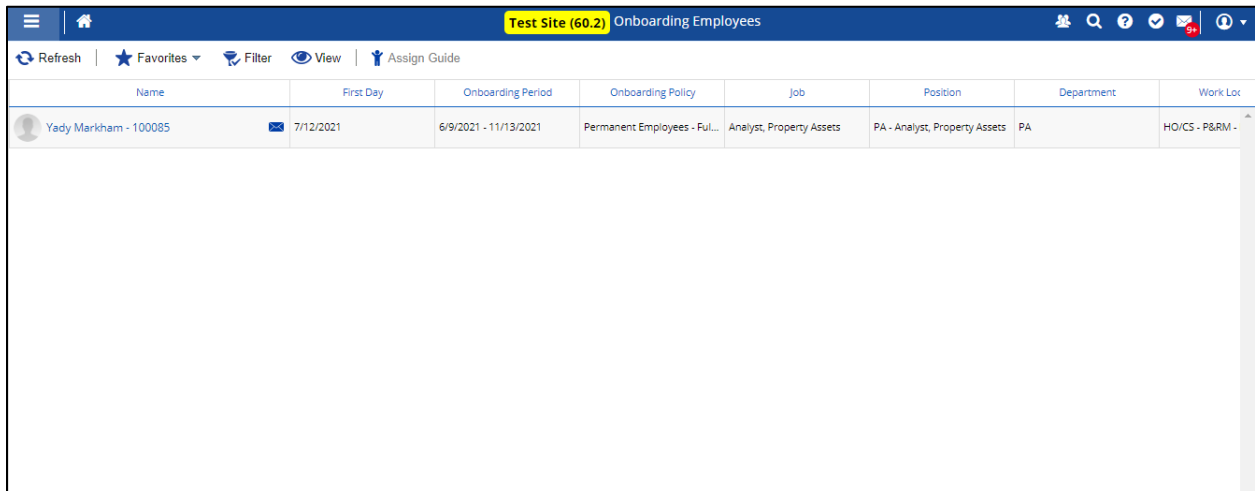


A dialog box titled "Select Role" with a light gray background. It contains two radio button options: "Manager" (selected) and "Employee - Time Entry". The "Manager" option is highlighted with a red rectangular box. At the bottom right, there is a blue button labeled "Next".

Once logged in under your **Manager** user role, select the **Onboarding Employees** icon, either as a shortcut on the Home screen or through the menu.

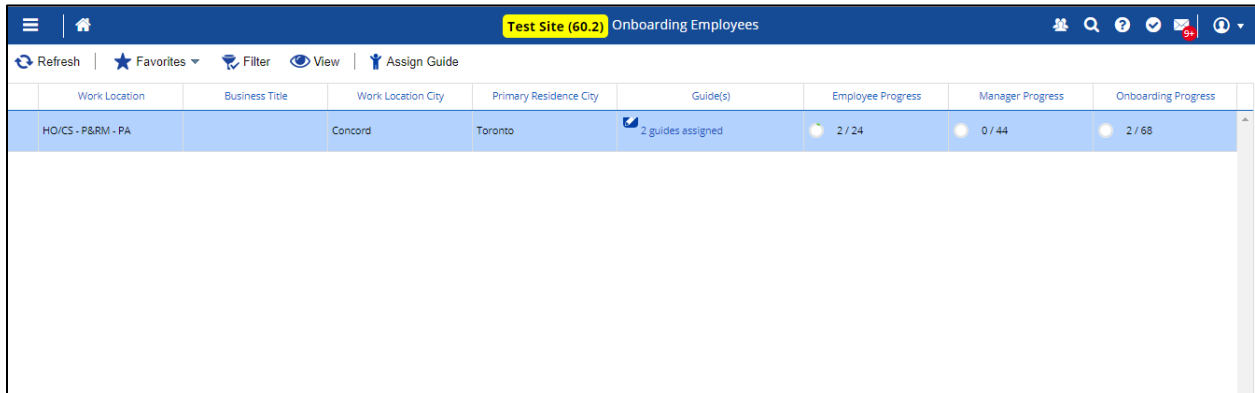


The **Onboarding Employees** screen displays.



Name	First Day	Onboarding Period	Onboarding Policy	Job	Position	Department	Work Loc
Yady Markham - 100085	7/12/2021	6/9/2021 - 11/13/2021	Permanent Employees - Ful...	Analyst, Property Assets	PA - Analyst, Property Assets	PA	HO/CS - P&RM -

Scroll to the right and additional columns to view additional columns in the grid.



Work Location	Business Title	Work Location City	Primary Residence City	Guide(s)	Employee Progress	Manager Progress	Onboarding Progress
HO/CS - P&RM - PA		Concord	Toronto	2 guides assigned	2 / 24	0 / 44	2 / 68

Some of the columns in the grid include.

- First Day
- Onboarding Period
- Onboarding Policy
- Onboarding Guides
- Employee Progress
- Manager Progress
- Onboarding Progress

Onboarding Employees – Filter

For managers that have many onboarding employees, the filter feature can be used to limit the list based on selected criteria. Click on the **Filter** button to activate the feature.

The screenshot shows the 'Onboarding Employees' interface. At the top, there is a navigation bar with a 'Filter' button highlighted by a red box. Below the navigation bar, there are several filter criteria: 'Employee Onboarding Progress' (set to 'All'), 'First Day' (set to 'between'), 'Include Employees Whose Onboarding Period Has Ended' (unchecked), 'Name' (empty), and 'Onboarding Policy' (set to 'Select an Onboarding Policy'). At the bottom of the filter section, there are buttons for 'Add Filter', 'Reset to Default', 'Include Indirect Reports', 'Apply Filter', 'Clear Filter', and 'Remove Filters'. Below the filter section, there is a table with columns: 'Work Location', 'Business Title', 'Work Location City', 'Primary Residence City', 'Guide(s)', 'Employee Progress', 'Manager Progress', and 'Onboarding Progress'. The first row of the table shows 'HO/CS - P&RM - PA', 'Concord', 'Toronto', '2 guides assigned', '2 / 24', '0 / 44', and '2 / 68'.

Onboarding Employees

To view onboarding details for an employee, click on their name in the grid.

The screenshot shows the 'Onboarding Employees' interface. At the top, there is a navigation bar with a 'Filter' button highlighted by a red box. Below the navigation bar, there are several filter criteria: 'Employee Onboarding Progress' (set to 'All'), 'First Day' (set to 'between'), 'Include Employees Whose Onboarding Period Has Ended' (unchecked), 'Name' (empty), and 'Onboarding Policy' (set to 'Select an Onboarding Policy'). At the bottom of the filter section, there are buttons for 'Add Filter', 'Reset to Default', 'Include Indirect Reports', 'Apply Filter', 'Clear Filter', and 'Remove Filters'. Below the filter section, there is a table with columns: 'Name', 'First Day', 'Onboarding Period', 'Onboarding Policy', 'Job', 'Position', 'Department', and 'Work Loc'. The first row of the table is highlighted with a red box and contains the following data: 'Yady Markham - 100085', '7/12/2021', '6/9/2021 - 11/13/2021', 'Permanent Employees - Ful...', 'Analyst, Property Assets', 'PA - Analyst, Property Assets', 'PA', and 'HO/CS - P&RM - PA'.

Name	First Day	Onboarding Period	Onboarding Policy	Job	Position	Department	Work Loc
Yady Markham - 100085	7/12/2021	6/9/2021 - 11/13/2021	Permanent Employees - Ful...	Analyst, Property Assets	PA - Analyst, Property Assets	PA	HO/CS - P&RM - PA

This will open the Onboarding dashboard for the employee.

On this screen, you will see high-level employee information on the top-left hand corner.

There are also three tabs:

(1) **Onboarding Forms**, (2) **Employee Tasklist**, and (3) **Manager Tasklist**.

Yady Markham - 100085
Analyst, Property Assets • HO/CS - P&RM - PA
First Day 7/12/2021 Onboarding Period 6/9/2021 - 11/13/2021

Guide(s) Heidi Wheeler, Leslie Osborne

Onboarding Forms Employee Tasklist Manager Tasklist

▼ Forms to Complete Prior to Your First Day

Task	Due Date	Due	Status
Complete your Personal Details	7/11/2021	16 Days	Not Started
Provide your Banking Information	7/12/2021	17 Days	Not Started

▼ Review and Complete Your Tax Withholding Forms

Task	Due Date	Due	Status
Complete your Tax Information	7/12/2021	17 Days	Not Started

▼ Review and Acknowledge TRCA HR Policies

Task	Due Date	Due	Status
Review and Acknowledge TRCA HR Policies	7/12/2021	17 Days	Not Started

The following columns are displayed within some or all the tabs:

- **Task:** Items that need to be completed by the employee/manager.
- **Due date:** The predetermined date the task is required to be completed (pre-populated based on an offset value applied to the employee's start date).
- **Due:** The number of days associated with the due date that is left or have passed. Where due dates have passed for a task, the system will display the item in red with negative numbers (representing days). The negative number shows the number of days that have exceeded the due date.
- **Status:** Highlights whether the item has
 - (1) not started Not Started
 - (2) started Started
 - (3) completed Completed
 - or (4) past due Past Due
- **Attachment:** Available in Employee Task List and Manager Task List. Allows you to easily access relevant resources referenced in the checklist.

Tab 1: Onboarding Forms

Onboarding forms includes essential forms and documentation that need to be completed or acknowledged by the new hire (e.g., personal, tax and banking information) along with the TRCA HR Policies. As a manager, you will be able to see associated timelines and status details for each task.

The **Onboarding Forms** screen has the following subsections:

Forms to Complete Prior to Your First Day

- The new hire is presented Personal Details and Banking Information forms under this section. Once they complete and submit **all** forms, the Status will update to “Completed”.

Review and Complete Your Tax Withholding Forms

- The new hire is presented with the Federal and Provincial versions of the tax form under this section. Once they complete and submit **both** forms, the Status will update to “Completed”.

Review and Acknowledge TRCA HR Policies

- The new hire is presented with six HR Policies under this section. Once they complete and submit **all** forms, the Status will update to “Completed”.

Yady Markham - 100085
Analyst, Property Assets • HO/CS - P&RM - PA
First Day 7/12/2021 Onboarding Period 6/9/2021 - 11/13/2021

Guide(s) Heidi Wheeler, Leslie Osborne

Onboarding Forms Employee Tasklist Manager Tasklist

▼ Forms to Complete Prior to Your First Day

Task	Due Date	Due	Status
Complete your Personal Details	7/11/2021	16 Days	Not Started
Provide your Banking Information	7/12/2021	17 Days	Not Started

▼ Review and Complete Your Tax Withholding Forms

Task	Due Date	Due	Status
Complete your Tax Information	7/12/2021	17 Days	Not Started

▼ Review and Acknowledge TRCA HR Policies

Task	Due Date	Due	Status
Review and Acknowledge TRCA HR Policies	7/12/2021	17 Days	Not Started

No action required for managers – the items listed in this tab are to be completed by the **employee**. As a manager, you will have visibility into the status of the associated items through the **Status** column.

Tab 2: Employee Task List

Here you can see the tasks the new hire has been assigned. You see only the Task Name. The new hire sees the same task name plus an associated description that includes explanation and instructions.

The employee tasks are group chronologically based on Due Date and the groups are labeled accordingly.

- **Preboarding Checklist**
- **First Two Weeks Checklist**

Test Site (60.2) Onboarding Employees

Yady Markham - 100085
Analyst, Property Assets • HO/CS - P&RM - PA
First Day 7/12/2021 Onboarding Period 6/9/2021 - 11/13/2021

Guide(s) Heidi Wheeler
Leslie Osborne

Onboarding Forms Employee Tasklist Manager Tasklist

+ Add Tasklist

Note: Attachment column: You will also be able to access any document that is attached for the employee to see by clicking the link which will open associated attachments in a new window.

Preboarding Checklist

Completed	Not Applicable	Task	Due Date	Due	Status	Last Modified By	Last Modified	Attachments
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Onboarding Package - Employees with Benefits	7/5/2021	10 Days	Completed	Yady Markham	6/17/21, 4:35 PM	Onboarding Package...
<input type="checkbox"/>	<input type="checkbox"/>	Complete Forms in Dayforce	7/10/2021	15 Days	Not Started			No attachment
<input type="checkbox"/>	<input type="checkbox"/>	Review and Accept TRCA Policies and Procedures	7/9/2021	14 Days	Not Started			No attachment
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Complete Employee Emergency Information Worksheet	7/9/2021	14 Days	Completed	Yady Markham	6/17/21, 4:35 PM	Employee Emergenc...
<input type="checkbox"/>	<input type="checkbox"/>	Upload Headshot Photo to Dayforce	7/10/2021	15 Days	Not Started			No attachment
<input type="checkbox"/>	<input type="checkbox"/>	Forward Headshot Photo So It Can Be Used to Develop Your	7/10/2021	15 Days	Not Started			No attachment
<input type="checkbox"/>	<input type="checkbox"/>	Security Pass Cards	7/10/2021	15 Days	Not Started			No attachment
<input type="checkbox"/>	<input type="checkbox"/>	Forward Vulnerable Sector Screening Clearance (if applicabl	7/10/2021	15 Days	Not Started			No attachment
<input type="checkbox"/>	<input type="checkbox"/>	Motor Vehicle Record for New Hires - ARI Drivers Insight Ser	7/11/2021	16 Days	Not Started			No attachment

First Two Weeks Checklist

Completed	Not Applicable	Task	Due Date	Due	Status	Last Modified By	Last Modified	Attachments
<input type="checkbox"/>	<input type="checkbox"/>	Set up Email Signature	7/13/2021	18 Days	Not Started			TRCA Email Signatur...
<input type="checkbox"/>	<input type="checkbox"/>	Record Voicemail Greeting	7/13/2021	18 Days	Not Started			Voicemail on Office P...
<input type="checkbox"/>	<input type="checkbox"/>	Health and Safety Training - Day 1	7/13/2021	18 Days	Not Started			No attachment
<input type="checkbox"/>	<input type="checkbox"/>	Health and Safety Training - Day 2	7/14/2021	19 Days	Not Started			No attachment
<input type="checkbox"/>	<input type="checkbox"/>	Attend Your Orientation Session	7/16/2021	21 Days	Not Started			No attachment

Save Cancel

No action required for managers – the items listed in this tab are to be completed by the **employee**. As a manager, you will have visibility into the status of the associated items through the **status** column.

Tab 3: Manager Task List

The manager task list has the following subsections:

- Preboarding Checklist
- Day 1 Checklist
- Day 2 Checklist
- Day 3 Checklist
- First Two weeks Checklist
- First Month Checklist
- First Three Months Checklist

The task list includes items a manager is responsible for when onboarding a new hire from the preboarding phase to the employee's first three months of hire. When these tasks are handled on a timely basis, it allows for a seamless start to the employee experience.

Yady Markham - 100085
Analyst, Property Assets • HO/CS - P&RM - PA
First Day 7/12/2021 Onboarding Period 6/9/2021 - 11/13/2021

Onboarding Forms Employee Tasklist **Manager Tasklist**

Preboarding Checklist

Completed	Not Applicable	Task	Due Date	Due	Status	Last Modified By	Last Modified	Description	Attachments
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Workstation Nameplate or Name Card for New Employee	6/28/2021	3 Days	Completed	Vijay Moduranj	6/25/21, 11:42 PM	Click to view	No attachment
<input type="checkbox"/>	<input type="checkbox"/>	Submit Hardware and Software Request to ITRM Service Desk	7/2/2021	7 Days	i ...			Click to view	ITRM Service Desk
<input type="checkbox"/>	<input type="checkbox"/>	Security Pass Cards	7/5/2021	10 Days	i ...			Click to view	No attachment
<input type="checkbox"/>	<input type="checkbox"/>	Inform Reception Staff of New Hire	7/5/2021	10 Days	i ...			Click to view	No attachment
<input type="checkbox"/>	<input type="checkbox"/>	Access to Corporate Records or Laserfiche (if applicable)	7/5/2021	10 Days	i ...			Click to view	No attachment
<input type="checkbox"/>	<input type="checkbox"/>	Employee Emergency Information Worksheet	7/12/2021	17 Days	i ...			Click to view	Employee Emerg...
<input type="checkbox"/>	<input type="checkbox"/>	Plan to Welcome your New Employee	7/12/2021	17 Days	i ...			Click to view	Onboarding Prog...
<input type="checkbox"/>	<input type="checkbox"/>	Prepare Administrative Items and Work Station	7/12/2021	17 Days	i ...			Click to view	No attachment
<input type="checkbox"/>	<input type="checkbox"/>	Onboarding Guide Selection	7/12/2021	17 Days	i ...			Click to view	Onboarding Guid...
<input type="checkbox"/>	<input type="checkbox"/>	Develop Work Plan / Book Key Meetings	7/12/2021	17 Days	i ...			Click to view	No attachment
<input type="checkbox"/>	<input type="checkbox"/>	Cerdian Dayforce Onboarding Package	7/12/2021	17 Days	i ...			Click to view	No attachment

Day 1 Checklist

Completed	Not Applicable	Task	Due Date	Due	Status	Last Modified By	Last Modified	Description	Attachments
<input type="checkbox"/>	<input type="checkbox"/>	Greet New Employee	7/12/2021	17 Days	i ...			Click to view	No attachment
<input type="checkbox"/>	<input type="checkbox"/>	Introductions and Tour	7/12/2021	17 Days	i ...			Click to view	No attachment
<input type="checkbox"/>	<input type="checkbox"/>	One-on-one Meeting	7/12/2021	17 Days	i ...			Click to view	No attachment
<input type="checkbox"/>	<input type="checkbox"/>	Technology and Systems Check-in	7/12/2021	17 Days	i ...			Click to view	No attachment

Save Cancel

Action: Completing Manager's Task List

When you have completed a task:

1. **Click the check box(s)** on the left-hand side of the list, and,
2. Click **Save**.

Completed items will be displayed with a green check box under **Completed**.

Note: As in other tabs, where the due date(s) have passed for a task, the system will display the item in **red** and the column titled **Due** will show negative dates corresponding to the number of days past the deadline.

Action: [Click to View](#)

Click on **Click to View** next to the task under **Description** to get more detailed information or instruction about the task.

Test Site (60.2) Onboarding Employees

Yady Markham - 100085
Analyst, Property Assets • HQ/CS - P&RM - PA
First Day 7/12/2021 Onboarding Period 6/9/2021 - 11/13/2021

Onboarding Forms Employee Tasklist

Preboarding Checklist

Completed	Not Applicable	Task
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Workstation Name
<input type="checkbox"/>	<input type="checkbox"/>	Submit Hardware
<input type="checkbox"/>	<input type="checkbox"/>	Security Pass Card
<input type="checkbox"/>	<input type="checkbox"/>	Inform Reception
<input type="checkbox"/>	<input type="checkbox"/>	Access to Corporate
<input type="checkbox"/>	<input type="checkbox"/>	Employee Emergency
<input type="checkbox"/>	<input type="checkbox"/>	Plan to Welcome
<input type="checkbox"/>	<input type="checkbox"/>	Prepare Administrative
<input type="checkbox"/>	<input type="checkbox"/>	Onboarding Guide
<input type="checkbox"/>	<input type="checkbox"/>	Develop Work Plan
<input type="checkbox"/>	<input type="checkbox"/>	Caridian Dayforce

Day 1 Checklist

Completed	Not Applicable	Task	Due
<input type="checkbox"/>	<input type="checkbox"/>	Greet New Employee	
<input type="checkbox"/>	<input type="checkbox"/>	Introductions and	
<input type="checkbox"/>	<input type="checkbox"/>	One-on-one Meeting	7/12/2021 17 Days
<input type="checkbox"/>	<input type="checkbox"/>	Technology and Systems Check-in	7/12/2021 17 Days

Description

Your new hire may require a nameplate, or a name card for a nameplate holder, to be printed and affixed to their workstation.

If your new hire will work out of either of the following locations, please forward an email to Lisa Valente - Property Services (Lisa.Valente@trca.ca):

- Head Office - 101 Exchange Avenue, Vaughan
- Swan Lake - 1229 Bethesda Sideroad, Richmond Hill

If your new hire will work out of any of the following locations, please forward an email to Kathy Stranks - Restoration and Infrastructure, Office Manager (Kathy.Stranks@trca.ca):

- Boyd Centre (9755 Canada Company Avenue, Woodbridge)
- Restoration Services Centre (9741 Canada Company Avenue, Woodbridge)
- Eastville Office (1 Eastville Avenue, Scarborough)

Subject line for email - "New Hire - Nameplate / Name Card". Please include the following details for your new hire:

- Name
- Start Date
- Position

Other work locations might or might not require employees to have nameplates or name cards, depending on the number of employees at the location. Please follow up with on-site contact that handles nameplates or name cards, if applicable.

[Click to view](#)

Close

Save Cancel

Checklists Available on Manager's Task List

The manager's task list has the following checklists organized into different timeframe. As the new hire progresses through the onboarding process, the manager can refer to the checklists and ensure the tasks are completed within the appropriate timelines.

Preboarding Checklist

Completed	Not Applicable	Task	Due Date	Due	Status	Last Modified By	Last Modified	Description	Attachments
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Workstation Nameplate or Name Card for New Employee	6/28/2021	3 Days	Completed	Vijay Mdduranj	6/25/21, 11:42 PM	Click to view	No attachment
<input type="checkbox"/>	<input type="checkbox"/>	Submit Hardware and Software Request to ITRM Service De	7/2/2021	7 Days	i ...			Click to view	ITRM Service Desk
<input type="checkbox"/>	<input type="checkbox"/>	Security Pass Cards	7/5/2021	10 Days	i ...			Click to view	No attachment
<input type="checkbox"/>	<input type="checkbox"/>	Inform Reception Staff of New Hire	7/5/2021	10 Days	i ...			Click to view	No attachment
<input type="checkbox"/>	<input type="checkbox"/>	Access to Corporate Records or Laserfiche (if applicable)	7/5/2021	10 Days	i ...			Click to view	No attachment
<input type="checkbox"/>	<input type="checkbox"/>	Employee Emergency Information Worksheet	7/12/2021	17 Days	i ...			Click to view	Employee Emerg...
<input type="checkbox"/>	<input type="checkbox"/>	Plan to Welcome your New Employee	7/12/2021	17 Days	i ...			Click to view	Onboarding Prog...
<input type="checkbox"/>	<input type="checkbox"/>	Prepare Administrative Items and Work Station	7/12/2021	17 Days	i ...			Click to view	No attachment
<input type="checkbox"/>	<input type="checkbox"/>	Onboarding Guide Selection	7/12/2021	17 Days	i ...			Click to view	Onboarding Guid...
<input type="checkbox"/>	<input type="checkbox"/>	Develop Work Plan / Book Key Meetings	7/12/2021	17 Days	i ...			Click to view	No attachment
<input type="checkbox"/>	<input type="checkbox"/>	Ceridian Dayforce Onboarding Package	7/12/2021	17 Days	i ...			Click to view	No attachment

Day 1 Checklist

Completed	Not Applicable	Task	Due Date	Due	Status	Last Modified By	Last Modified	Description	Attachments
<input type="checkbox"/>	<input type="checkbox"/>	Greet New Employee	7/12/2021	17 Days	i ...			Click to view	No attachment
<input type="checkbox"/>	<input type="checkbox"/>	Introductions and Tour	7/12/2021	17 Days	i ...			Click to view	No attachment
<input type="checkbox"/>	<input type="checkbox"/>	One-on-one Meeting	7/12/2021	17 Days	i ...			Click to view	No attachment
<input type="checkbox"/>	<input type="checkbox"/>	Technology and Systems Check-In	7/12/2021	17 Days	i ...			Click to view	No attachment
<input type="checkbox"/>	<input type="checkbox"/>	Health and Safety Training - Day 1	7/12/2021	17 Days	i ...			Click to view	No attachment
<input type="checkbox"/>	<input type="checkbox"/>	Job Hazard Assessments	7/12/2021	17 Days	i ...			Click to view	No attachment
<input type="checkbox"/>	<input type="checkbox"/>	Day 1 Check-In	7/12/2021	17 Days	i ...			Click to view	No attachment

Day 2 Checklist

Completed	Not Applicable	Task	Due Date	Due	Status	Last Modified By	Last Modified	Description	Attachments
<input type="checkbox"/>	<input type="checkbox"/>	Organizational Components	7/13/2021	18 Days	i ...			Click to view	No attachment
<input type="checkbox"/>	<input type="checkbox"/>	Technology and Systems Overview	7/13/2021	18 Days	i ...			Click to view	Review How to C...
<input type="checkbox"/>	<input type="checkbox"/>	Access to eLearning for Training	7/13/2021	18 Days	i ...			Click to view	No attachment
<input type="checkbox"/>	<input type="checkbox"/>	Health and Safety Training - Day 2	7/14/2021	19 Days	i ...			Click to view	No attachment

Day 3 Checklist

Completed	Not Applicable	Task	Due Date	Due	Status	Last Modified By	Last Modified	Description	Attachments
<input type="checkbox"/>	<input type="checkbox"/>	Additional Policies	7/14/2021	19 Days	i ...			Click to view	No attachment
<input type="checkbox"/>	<input type="checkbox"/>	Training	7/14/2021	19 Days	i ...			Click to view	No attachment

First Two weeks Checklist

Completed	Not Applicable	Task	Due Date	Due	Status	Last Modified By	Last Modified	Description	Attachments
<input type="checkbox"/>	<input type="checkbox"/>	Human Resources New Hire Orientation Session	7/16/2021	21 Days	i ...			Click to view	No attachment
<input type="checkbox"/>	<input type="checkbox"/>	Meet with Key Members	7/19/2021	24 Days	i ...			Click to view	No attachment
<input type="checkbox"/>	<input type="checkbox"/>	Visa Card and Purchasing Status Requests (if applicable)	7/19/2021	24 Days	i ...			Click to view	No attachment
<input type="checkbox"/>	<input type="checkbox"/>	Health and Safety Training - End of Week 1	7/19/2021	24 Days	i ...			Click to view	No attachment
<input type="checkbox"/>	<input type="checkbox"/>	Commercial Vehicle Operator Training (if applicable)	7/26/2021	31 Days	i ...			Click to view	No attachment
<input type="checkbox"/>	<input type="checkbox"/>	Check-Ins	7/26/2021	31 Days	i ...			Click to view	No attachment
<input type="checkbox"/>	<input type="checkbox"/>	Assign a Small Project	7/26/2021	31 Days	i ...			Click to view	No attachment
<input type="checkbox"/>	<input type="checkbox"/>	Organizational Fit	7/26/2021	31 Days	i ...			Click to view	No attachment
<input type="checkbox"/>	<input type="checkbox"/>	Key Stakeholder Introductions	7/26/2021	31 Days	i ...			Click to view	No attachment
<input type="checkbox"/>	<input type="checkbox"/>	Team Activities	7/26/2021	31 Days	i ...			Click to view	No attachment
<input type="checkbox"/>	<input type="checkbox"/>	Training	7/26/2021	31 Days	i ...			Click to view	No attachment

First Month Checklist

Completed	Not Applicable	Task	Due Date	Due	Status	Last Modified By	Last Modified	Description	Attachments
<input type="checkbox"/>	<input type="checkbox"/>	Performance Development Program	8/11/2021	47 Days	i ...			Click to view	No attachment
<input type="checkbox"/>	<input type="checkbox"/>	Relationship Building	8/11/2021	47 Days	i ...			Click to view	No attachment
<input type="checkbox"/>	<input type="checkbox"/>	Check-Ins	8/11/2021	47 Days	i ...			Click to view	No attachment
<input type="checkbox"/>	<input type="checkbox"/>	Training	8/11/2021	47 Days	i ...			Click to view	No attachment
<input type="checkbox"/>	<input type="checkbox"/>	Policy Review	8/11/2021	47 Days	i ...			Click to view	No attachment

First Three Months Checklist

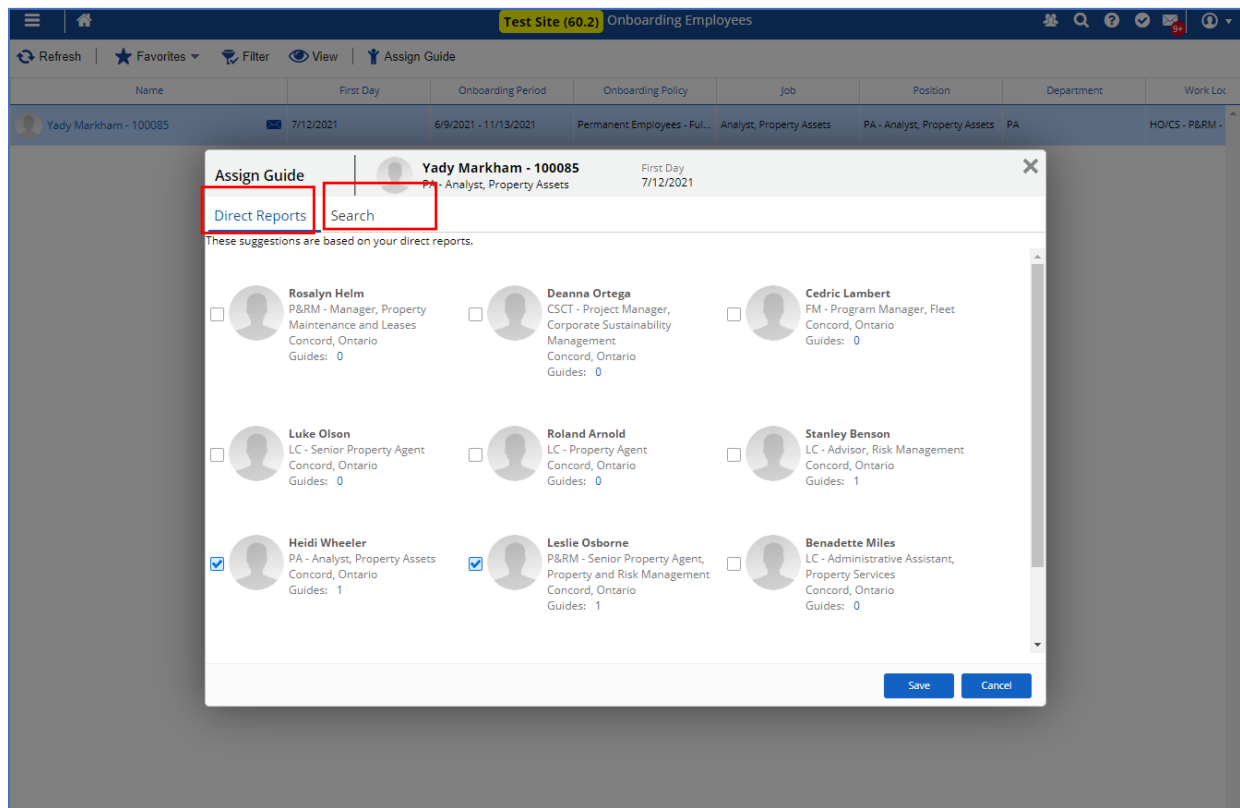
Completed	Not Applicable	Task	Due Date	Due	Status	Last Modified By	Last Modified	Description	Attachments
<input type="checkbox"/>	<input type="checkbox"/>	Check-Ins	10/10/2021	107 Days	i ...			Click to view	No attachment
<input type="checkbox"/>	<input type="checkbox"/>	Review Performance	10/10/2021	107 Days	i ...			Click to view	No attachment
<input type="checkbox"/>	<input type="checkbox"/>	Relationship Building	10/10/2021	107 Days	i ...			Click to view	No attachment
<input type="checkbox"/>	<input type="checkbox"/>	Onboarding Survey	10/10/2021	107 Days	i ...			Click to view	No attachment

Assign Onboarding Guide(s)

You can assign another employee as an Onboarding Guide to help them through the first several weeks of the Onboarding process.

With the row new hire's name selected, click the Assign a Guide button. 

You can select either one of your Direct Reports, or you can Search for someone else in the organization to assign. Check the box next to the name, then click Save.



The screenshot shows the 'Assign Guide' dialog box for Yady Markham - 100085. The 'Direct Reports' tab is selected, and a search box is visible. The list of direct reports includes:

- Rosalyn Helm: P&RM - Manager, Property Maintenance and Leases, Concord, Ontario, Guides: 0
- Deanna Ortega: CSCT - Project Manager, Corporate Sustainability Management, Concord, Ontario, Guides: 0
- Cedric Lambert: FM - Program Manager, Fleet, Concord, Ontario, Guides: 0
- Luke Olson: LC - Senior Property Agent, Concord, Ontario, Guides: 0
- Roland Arnold: LC - Property Agent, Concord, Ontario, Guides: 0
- Stanley Benson: LC - Advisor, Risk Management, Concord, Ontario, Guides: 1
- Heidi Wheeler: PA - Analyst, Property Assets, Concord, Ontario, Guides: 1 (Selected)
- Leslie Osborne: P&RM - Senior Property Agent, Property and Risk Management, Concord, Ontario, Guides: 1 (Selected)
- Benadette Miles: LC - Administrative Assistant, Property Services, Concord, Ontario, Guides: 0

The 'Save' button is at the bottom right of the dialog.

Please access the “Onboarding Guide” document that is attached to the “Onboarding Guide Selection” task item in your **Preboarding** check list. Refer to “Guidelines to Assigning a Guide” for more information on how to effectively select an Onboarding Guide.

Notifications

The following system notification will be generated:

Onboarding Employee First Day to Hiring Manager

A notification will be sent to you for your new hire:

- 7 days before their start date
- 1 day before their start date.

You will receive the notification in Dayforce Message Centre with a related notification to business email.

