Success Factors

Tips and Troubleshooting for Onboarding Coordinators

All new hires (faculty, staff, students, temps) must go through onboarding for completion of their Employee Activities, which includes section 1 of Form I9 and completion of Orientation Activities, which includes section 2 of Form I9. All new hires also must have their employment authorized through e-verify which follows the completion of both section 1 and section 2 of the Form I9. The exception is for Unpaid Non Regular Rank Faculty hired into personnel subarea 0023, which is reserved for Non Regular Rank Faculty who will never be paid by Duke University and Unpaid Regular Rank Faculty hired into personnel subarea 0033. Hence, the Form I9 requirement is waived for these 2 PSA’s.

How are new hires moved into the onboarding module?

**Staff, and School of Medicine Job Family 27** new hires are moved to the Onboarding module via the Success Factors Recruitment module. The last step of the Recruiting module requires that the Hiring Manager or their designee take action to Initiate Onboarding.

**Faculty, University Job Family 27, Students, temporary** new hires are moved to the Onboarding module via the Express Hire process. Once the HR/Payroll Representative submits the hire iForm, the new hire’s information will be pushed to Onboarding.

**Confidential Payroll and other hires initiated via a paper hire form** will need to contact the HRIC at 684-5600 for assistance with manually adding these exceptions to the Onboarding module so that the new hire’s employment can be authorized through e-verify.

Basic Navigation

The Onboarding Tool is accessible via the Duke@Work portal. Click Success Factors tab which opens the SuccessFactors application.
Go to Success Factors Home and select Onboarding from the drop down:

If you need additional information, review the Basic Onboarding Navigation Quick Reference Guide on the Success Factors resources page:


If this is your first time accessing the Onboarding module, make sure you switch to the new version by clicking on the Try new version link and setup your onboarding password to allow you to e-sign Form I9.

Instructions for setting up Onboarding Password can be found on the Success Factors resource page:

Onboarding Tool Bar Menu:

Once you have switched to the new version, the tool bar menu appears in the upper right hand corner of your screen. These tool bar icons allow you to take certain actions to manage the onboarding process.

My Tasks - shows the number of tasks assigned to you that require action, you can click on the circle to see the tasks assigned to you.

Waiting on Onboarding - shows the number of tasks waiting on onboarding

Overdue: shows the number of tasks that are past due

Completed - shows the number of completed onboarding tasks, you can click on the circle to view new hires that have completed tasks

Tool Bar Icons:

The first Tool Bar icon allows you to reassign a task to someone other than yourself, cancel item, or restart activity to move to the previous task.

Enter the reason for restart

| resend welcome email to new hire |
The second Tool bar icon 🏷️ allows you to filter by various fields and conditions.

The third Tool bar icon ⇧ allows you to sort by various conditions.

The fourth Tool bar icon 🎨 expands to full screen to allow you to see text to the right, click a second time to remove full screen view to show onboarding menu to left of screen.
Overview of Onboarding Processes:

<table>
<thead>
<tr>
<th>Processes</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Onboarding</td>
<td>1</td>
</tr>
<tr>
<td>Manager and HR Activities</td>
<td>0</td>
</tr>
<tr>
<td>Employee Activities</td>
<td>1</td>
</tr>
<tr>
<td>Orientation Activities</td>
<td>0</td>
</tr>
<tr>
<td>Signature Step</td>
<td>0</td>
</tr>
<tr>
<td>Notifications</td>
<td>0</td>
</tr>
<tr>
<td>I-9 3 Business-Days</td>
<td>0</td>
</tr>
<tr>
<td>E-Verify</td>
<td>0</td>
</tr>
<tr>
<td>I-9 Reverification</td>
<td>0</td>
</tr>
<tr>
<td>E-Verify Correct Data</td>
<td>0</td>
</tr>
<tr>
<td>Internal Hires and Contractors</td>
<td>0</td>
</tr>
</tbody>
</table>

Manager and HR Activities: Onboarding Coordinator or designee verifies start date, chooses work arrangement and re-enters email address to send Welcome email with link for new hire to complete Employee Activities.
Employee Activities: New Hire completes all employee activities, e-signs forms, and submits all documents to advance to Orientation Activities.

Orientation Activities: Onboarding Coordinator completes section 2 of Form I9 and submits to e-verify for employment authorization.

Signature Step: Task may move to the signature step when an e-signature is required for either section 1 or section 2 of the I9. This may occur if a correction is made to original I9 and a new I9 needs to be completed and requires a new signature. Signature are managed externally via DocuSign. You will receive the popup below listing the recipients of the email. The mail will contain a link to sign the document.

The email will come from careers@sign.onboarding.duke.edu and includes the following branding. On completion you will receive another as noted to the right.
Notifications: Allows additional notifications to be sent to Onboarding participants (not using this time).

I9-3 Business Days: I9’s that are waiting on section 2 of the I9 to be completed and are at the 3rd business day for completion before being past due.

E-Verify: I9’s that have not been authorized through e-verify either because the photo matching step was not completed or the I9 does not have a social security number. Also, if DHS returned an employment authorized result but the case was not closed, it will show up under the E-verify task and wait for the Onboarding Coordinator to the Resolve the Case.

Please note: Foreign nationals who do not yet have social security numbers will need to have their social security numbers updated under the E-Verify task so that the Form I9 can be pushed to e-verify for employment authorization. Updating a foreign national’s social security number is the responsibility of the Onboarding Coordinator and not Duke Visa Services, who only completes the I9 for foreign nationals.

IMPORTANT: Cases should only be closed with the reason “Employment Authorized.”

The employee continues to work for the employer after receiving an Employment Authorized result.

If you received a TNC result, you will need to have the new go through TNC resolution process.

If the data was entered incorrectly on the I9, then close the case as invalid data and redo the I9.

The case is being closed because the data entered is incorrect.

I9 Reverification: Task for re-verifying employees (i.e. foreign nationals) with work documents that are expiring.

E-Verify Correct Data- If a case is closed for invalid data or if the e-verify message came up as “Case incomplete” and the Section 2 completer had to correct the data (i.e. document number), then a new I9, both section 1 & section 2 will need to be done with the correct information.

Internal Hires and Contractors- onboarding tasks for transfers, which includes a transfer checklist of items they need to address:
Troubleshooting Tips: Onboarding Process

**How do I locate where a new hire is in my onboarding dashboard?**

Click on the My Task at top of menu, to view tasks assigned to you. If not assigned to you, you can use the filter icon to search by last name or first name.

**How do I reassign a task to another person?**

Check the box next to the name of new hire task that you want to reassign, then click on the action icon and select reassign from the drop down.

The reassign Activity box pops up for you to select an employee to reassign the task. Please note you cannot reassign to a new hire since they are not yet an employee and are not in the employee table.

**How do I reassign the Employee Activities back to the new hire instead of me?**
Check the box next to name of new hire's task, then click on the action icon and select Restart Activity from the drop down.

Enter the reason for restarting the Employee Activity, then click OK

Restarting the Employee Activities, moves the task back to Manager and HR Activities:

Click on new hire’s name to resend the welcome email to new hire which also reassigns it back to the new hire:

Please Note tasks can only be restarted within their current process such as Onboarding, E-Verify, and E-Verify Correct Data and restarting moves them to the prior step:
How do I resend the welcome email to the new hire?

You can either forward the copy of the welcome email that was sent to you or you can use the restart activity option to move the new hire from the employee activities and back to the Manager & HR activities to resend the email.

How do I take on a task that is assigned to someone else?

Click on the name of the new hire that you want to take over the activity. A box will pop up asking if you want to proceed with the change. Click Yes.

How do I correct data on section 2 of the I9?

There are prompts throughout the section 2 process asking you to verify the information and if incorrect, it provides you with an option to correct the data:

Verification of citizenship:

Is the citizenship/immigration status selected correct?  ○ Yes  ○ No

New hire indicated they were bringing one type of document, but show up with another, click None in the drop down for List A, and then select from drop down in List B and C.
**Review Name, SSN, date of birth.** If information is incorrect, click on the incorrect data and update.

**Review Citizenship status, hire date, and documents.** If information is incorrect, click on the incorrect data and update.

Please Note: If you miss correcting the information on Form I9 after you have signed and submitted the I9 document, you will likely get an e-verify message of “Case Incomplete.” When you hit the Next button, it will display a screen with the data that needs to be reviewed and possibly corrected. Once you correct data at this point, a new I9 will need to be completed by both the new hire and Section 2 Completer. If you continue without correcting, you are most likely going to receive a Tentative Non Confirmation result that will need to be resolved.

**New Hires cannot remain on payroll if they do not have an Employment Authorized case result.**

Please contact the HRIC at 684-5600 for any e-verify case that does not return an Employment Authorized result or states Verification in Process before you attempt to resolve and close the case.
Troubleshooting Tips: E-Verify Process

How do I complete the photo matching steps?

The Photo Matching step is required when an employee is using a document from list A, such as a U.S. passport, permanent resident ID card, or EAD (I-766) employment authorization document. We are required to confirm the image on the document and to keep a copy of these documents.

First, you will need to scan and upload the required document

Browse for scanned copy of passport, then press Upload

Check to make sure the document successfully loaded:

Initial Verification Screen displays:
Next, it will ask you to confirm photo: Click the Confirm button even if no image appears.

Submit to e-Verify- Initial Verification and Confirm Initial Verification Results is Employment Authorized

Complete the E-Verify step by answering employment question and closing case. Is the employee currently employed with this company? Answer YES Click on Finish to exit Form I9 Section 2 onboarding
**What do I do when Initial Verification Result shows “Verification in Process”?**

If employment not authorized immediately (Verification in Process), hit Next button to continue to Refresh Case Status.

Click on Refresh Case Status until a new E-Verify result returns. You may return to open E-Verify tasks shown on your Onboarding dashboard at a later time to check E-Verify status and close the case once employment is authorized.

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### I still have a task showing up under e-Verify even though employment was authorized. How do I complete this task?

<table>
<thead>
<tr>
<th>Tasks (3)</th>
<th>Assigned To</th>
<th>Hiring Date</th>
<th>Case Number</th>
<th>Emp ID</th>
<th>Case Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Secondary Verification</td>
<td>LOLA YEVERTON</td>
<td>Sep 1, 2019</td>
<td>2010465410619</td>
<td>xxx-xx-0037</td>
<td>EMPLOYMENT AUTHORIZED</td>
</tr>
</tbody>
</table>

If you did not close the everify case after receiving an employment authorized result, you will need to go back under your E-verify tasks and click on the new hires’ name to close the case.

After confirming that the everify case result shows “Employment Authorized”, click the Next button.

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**Verification Response**

- **Eligibility:** Employment Authorized
- **Response Date:** 09/06/2019

[Refresh Case Status]
Next screen should show “Employment Authorized” with questions: Is the employee currently employed with this company? Click Yes, then click Finish to close case with an employment authorized result.

**I do not see the Next button to be able to close the e-verify case as authorized. What do I do?**

If there is no Next button to proceed with closing the everify case after you’ve clicked on the Yes radio button in response to the question, “is the employee currently employed with this company?”, then click on the Request Closure Options button, which will display reasons for closing the case.

Make sure you select the reason, “The employee continues to work for the employer after receiving an Employment Authorized result.”
Then, click on the Submit Resolve Case button:

I do not have an option for closing the case with the reason of “The Employee Continues to work for the employer after receiving an Employment Authorized result. What do I do?

This usually happens when information on the I9 was entered incorrectly or there is a tentative non-confirmation result. If after reviewing the data on the I9, you discover that data was entered incorrectly such as a document number, then close the case with the reason of invalid data. You will then need to go to e-verify corrections and start over with a new Form I9 (both section 1 & 2 will need to be completed). Make sure you correct the data on the 2nd Form I9. If all the data was entered correctly, then you have a legitimate tentative non confirmation result and will need to go through the TNC process with the new hire. Please contact the HRIC for further instructions or refer to the TNC Resolution Process instructions found on the Success Factors Resource page.

I have an open e-verify task showing Initial Verification and the new hire does have a social security number but the case status is blank. How do I complete this task?
An incomplete Initial Verification task usually occurs when you have not completed the required photo matching steps. Click on the name of the person to display the incomplete task. In the example below, the Onboarding Coordinator did not complete the photo matching step for new hire that presented an EAD document. Refer to photo matching steps to complete this activity.

I have a task under e-Verify process that shows the case status as “Verification Incomplete.” What do I need to do to complete this task?
The case status “Verification Incomplete” can occur for several reasons. You will need to click on the person’s name and follow the screen prompts to determine what steps you need to complete. This usually occurs when you have not completed the photo matching steps. Click the Back button and follow the photo matching steps and then submit to e-Verify.

Verification Incomplete can also occur when you receive a result of “Case Incomplete” and is a warning that the case is likely to go to a TNC result if you do not correct the data.

Initial Verification Results

Click the Next button and verify the document data on next screen. If the data is wrong, you will need to correct the data before you click on the Submit DHS (or SSA) ReVerify button.
Troubleshooting Tips: E-Verify Correct Data Process

Tasks show up under the e-verify correct data process whenever an I9 needs to be corrected. This typically happens if document numbers in section 1 or section 2 are corrected late in the process.

Both the new hire and the Onboarding Coordinator will need to review the I9 together and e-sign both section 1 and section 2 to complete the I9 process and end with an Employment Authorized result.

All signatures will occur externally via an email using the DocuSign service.

Onboarding Coordinators can save time by making sure they are completing Section 2 of the I9 with correct information. Double check document numbers to make sure the information is correct.