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?

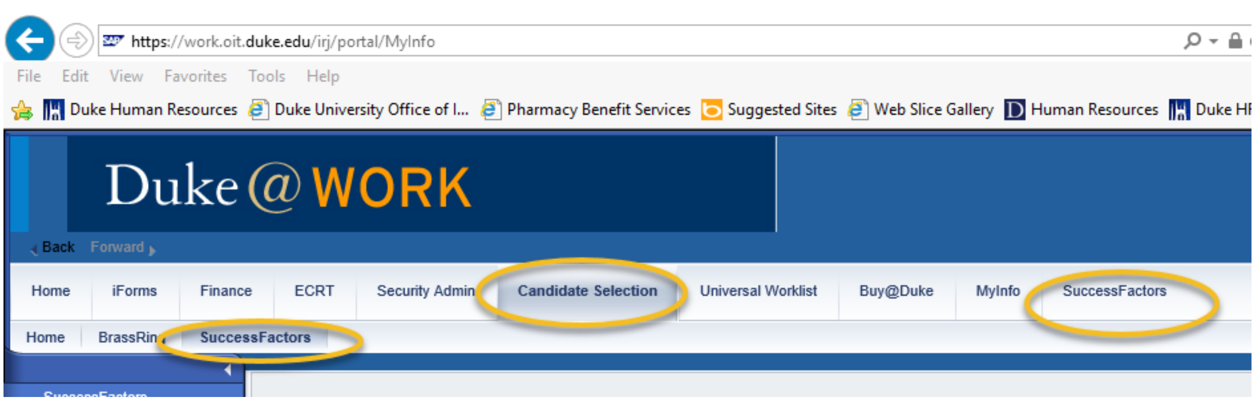
Staff, and School of Medicine Job Family 27 new hires are moved to the Onboarding module via the Success Factors Recruitment module. The last step of the Recruiting module requires that the Hiring Manager or their designee take action to Initiate Onboarding.

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.

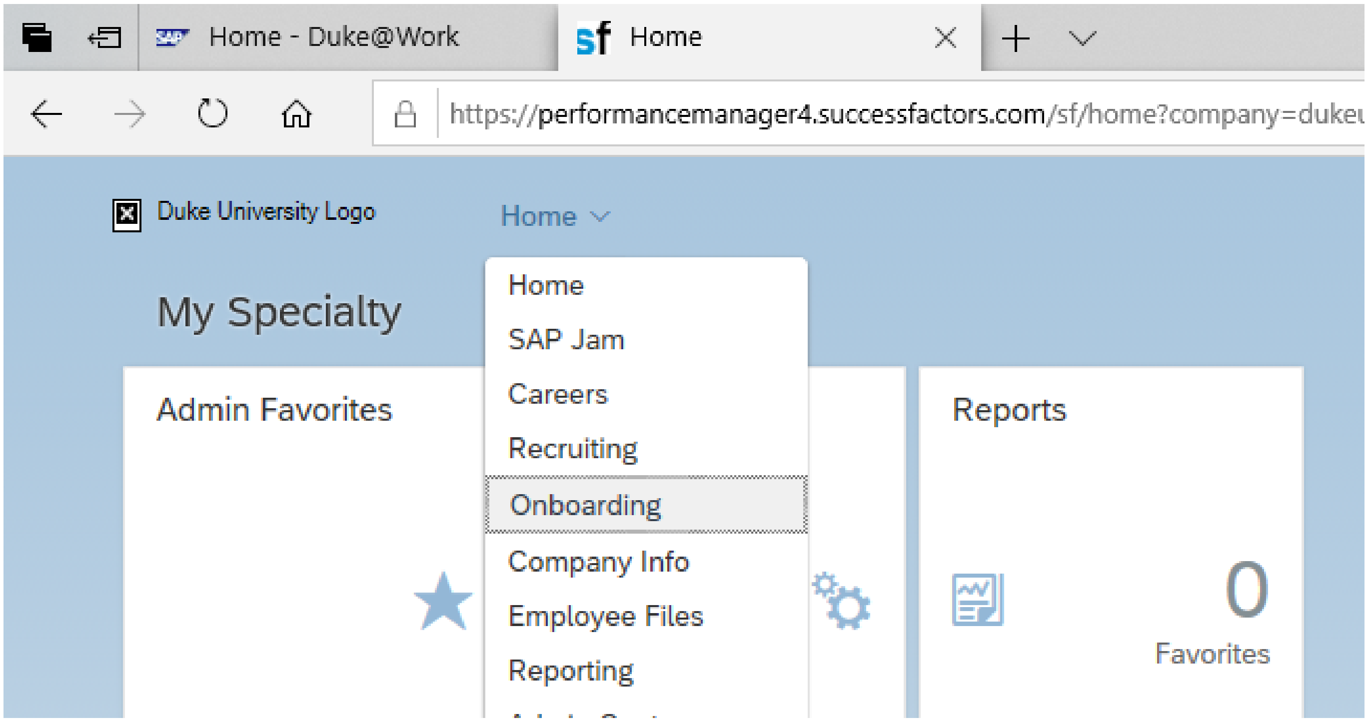
Confidential Payroll and **other hires initiated via a paper hire iform** will need to contact the HRIC at 684-5600 for assistance with manually adding these exceptions to the Onboarding module so that the new hire's employment can be authorized through e-verify.

Basic Navigation

The Onboarding Tool is accessible via the Duke@Work portal. Click the Candidate Selection or Success Factors tab.



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:

https://hr.duke.edu/sites/default/files/atoms/files/SuccessFactors%20Quick%20Reference%20Guide%20-%20Onboarding%20Basic%20Navigation.pdf

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:

https://hr.duke.edu/sites/default/files/atoms/files/SuccessFactors%20Quick%20Reference%20Guide%20-%20Setting%20Up%20an%20Onboarding%20Password.pdf

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.

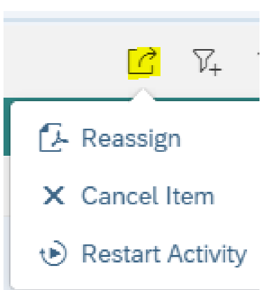
Waiting on Onboarding- shows the number of tasks waiting on onboarding

Overdue: shows the number of tasks that are past due

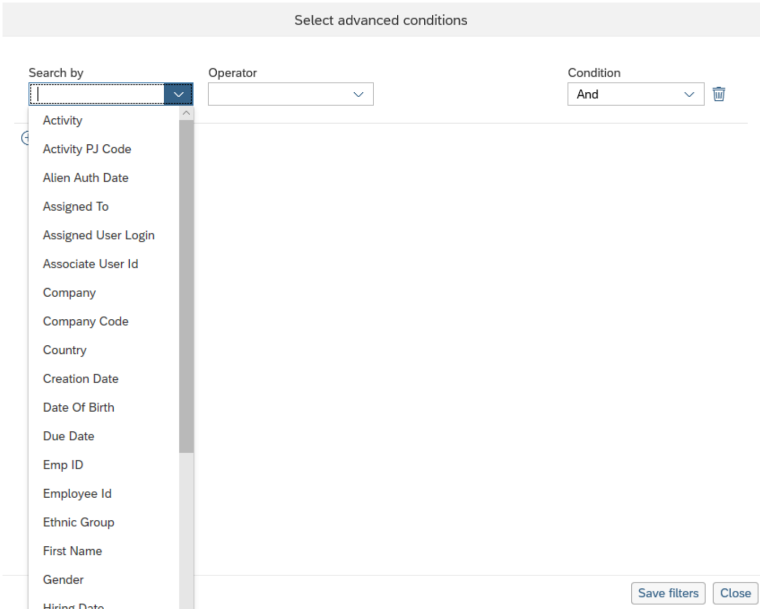
Completed-shows the number of completed onboarding tasks, you can click on the circle to view new hires that have completed tasks

Tool Bar Icons:

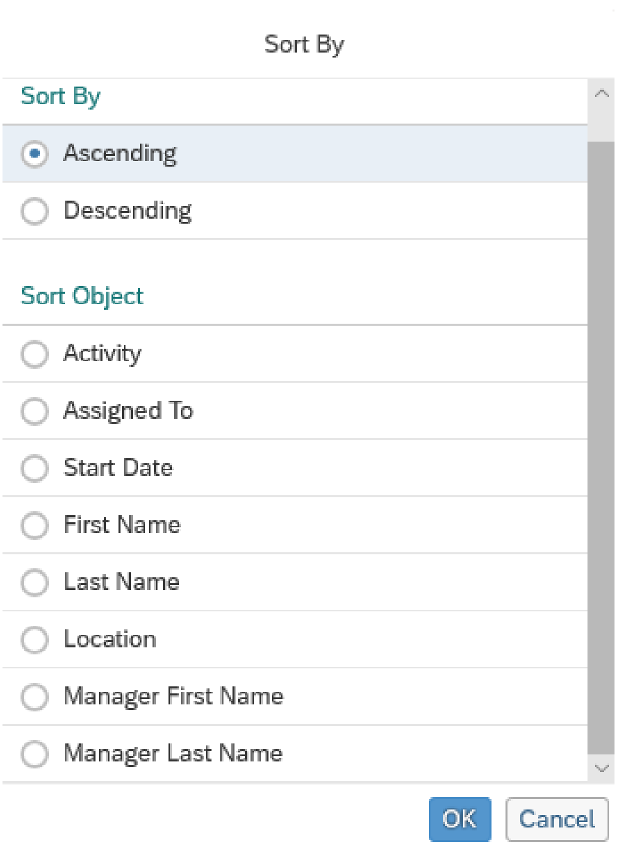
The first Tool Bar icon  allows you to reassign a task to someone other than yourself, cancel item, or restart activity to move to the previous task.



The second Tool bar icon  allows you to filter by various fields and conditions

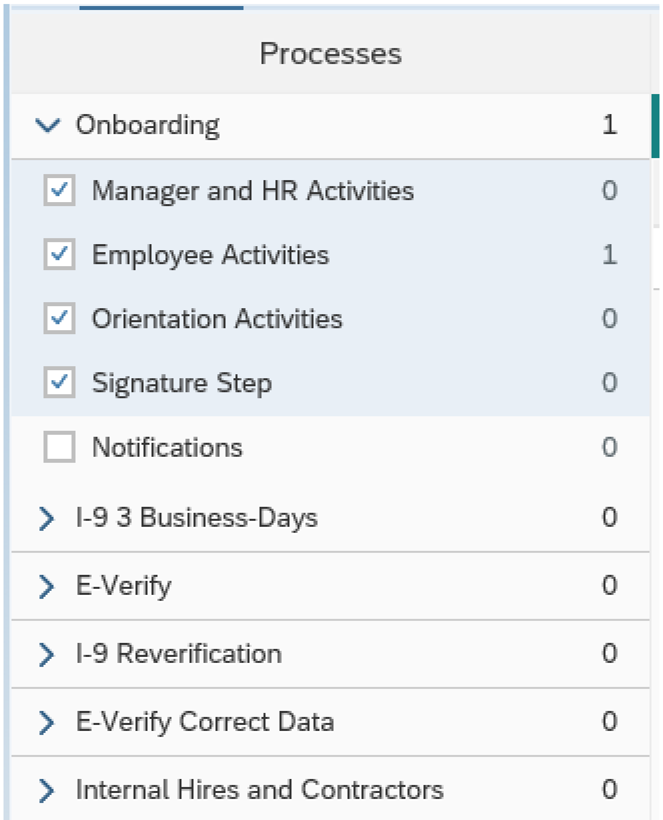


The third Tool bar icon  allows you to sort by various conditions

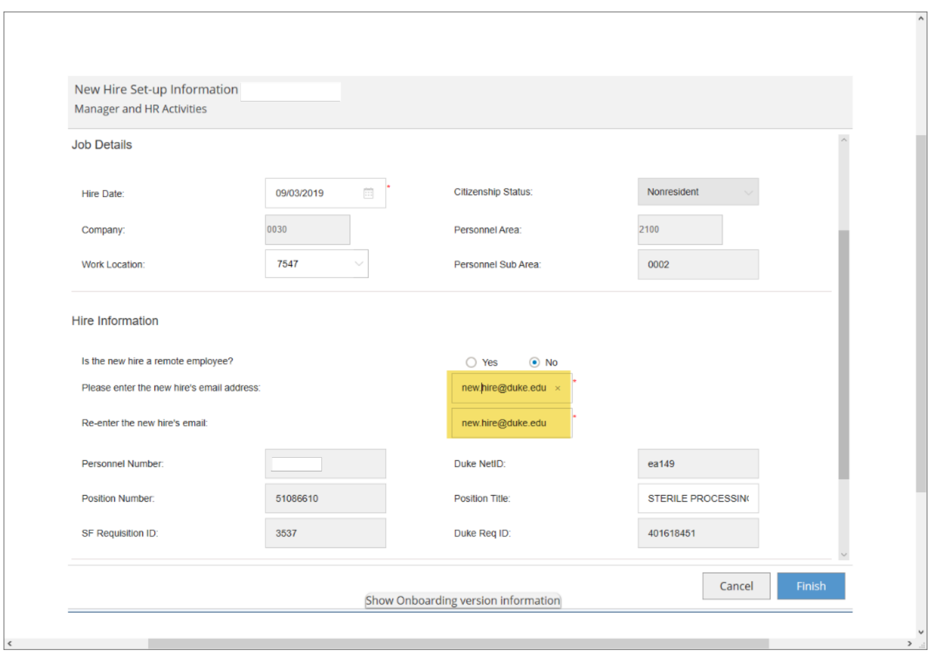


The fourth Tool bar icon  expands to full screen to allow you to see text to the right, click a second time to remove full screen view to show onboarding menu to left of screen

Overview of Onboarding Processes:



Manager and HR Activities: Onboarding Coordinator or designee verifies start date 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.

Welcome to Duke and the new employee wizard. This wizard will step you through the forms necessary to begin work at Duke University and Health System. Instructions are included as you complete the forms. Here are the forms you will need to complete:

- Setup password and security questions for electronic signing of documents
- Social Security Number Verification for E-Verify
- Physical address verification (Home and Mailing)
- Part 1 of the Federal I9 (Instructions included)
- Federal W4
- State W4 depending on work location
- Emergency contact
- Direct deposition
- Setup direct deposit
- Equal Employee Opportunity Report (EEO-1)
- W2 Online Election
- Review of Employee Handbook
- Confidentality Agreement

The wizard saves as you go and you can come back and complete remaining items later. At the end of the wizard, you can review all the forms and quickly make any changes. You wil electronically sign a subset of the documents and have the opportunity to download copies for your records.

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

Signature Step: Task may move to 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.

JACQUELINE LABONTE

Please, enter your password. After you key in your password, click the "Submit" button. Afterwards the list of forms will be displayed that require your signature. The first form will automatically be displayed. Click the "Click to Sign" button. A check mark will appear near the form you have electronically signed and the next form will be displayed for signature. Continue the process until all forms are signed.

Agreement to Use Electronic Click Signature to Sign Documents

☐ I, JACQUELINE LABONTE, agree to sign these electronic PDF documents using "click" signature technology. I understand that a record of each document and my signing of it will be stored in electronic code. I intend both the signature I inscribe with the "click" signature technology and the electronic record of it to be my legal signature to the document. I confirm that the document is "written" or "in writing" and that any accurate record of the document is an original of the document.

Corporate Representative Title CORPORATE REPRESENTATIVE   Password

Forgot Password

Submit

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:

Transfer Checklist
Employee Activities

Please work with your current supervisor and payroll prepresentative in your old department to insure the transition occurs smoothly. Depending on the type of transfer, be prepared to do the following:

- [ ] Turn in Corporate Card and Receipts
- [ ] Finalize time records in current department before leaving
- [ ] Turn over any Duke University and Health System property assigned to you. This includes badges, keys, and uniform.
- [ ] Return parking permit to Parking Services
- [ ] Contact the HRIC if you are moving between the Biweekly and Monthly payroll areas

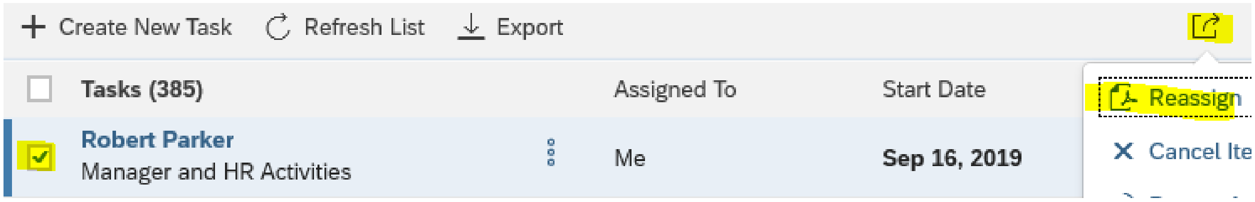
Troubleshooting Tips: Onboarding Process

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

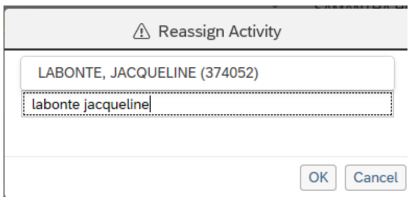
Click on the My Task at top of menu, to view tasks assigned to you. If not assigned to you, you can use the filter icon to search by last name or first name.

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.

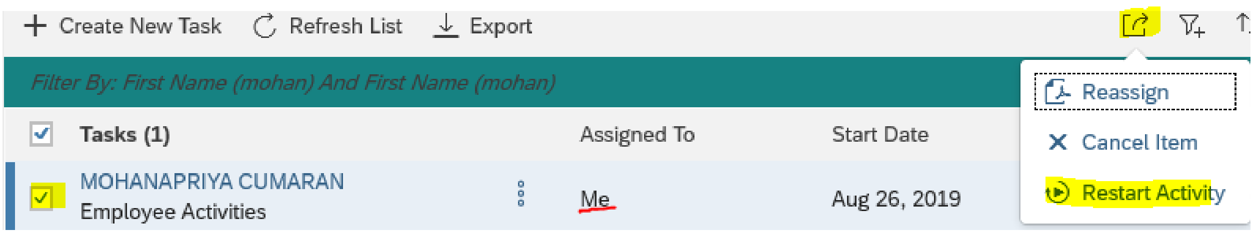


The reassign Activity box pops up for you to select an employee to reassign the task. Please note you cannot reassign to a new hire since they are not yet an employee and are not in the employee table.



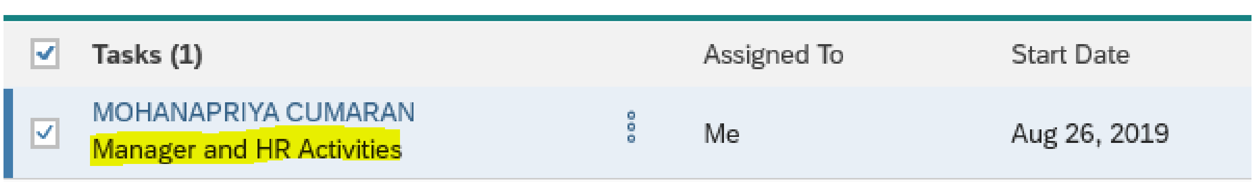
How do I reassign the Employee Activities back to the new hire instead of me?

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.

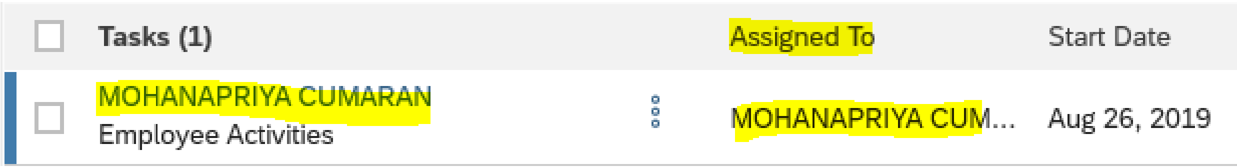


Enter the reason for restarting the Employee Activity, then click OK

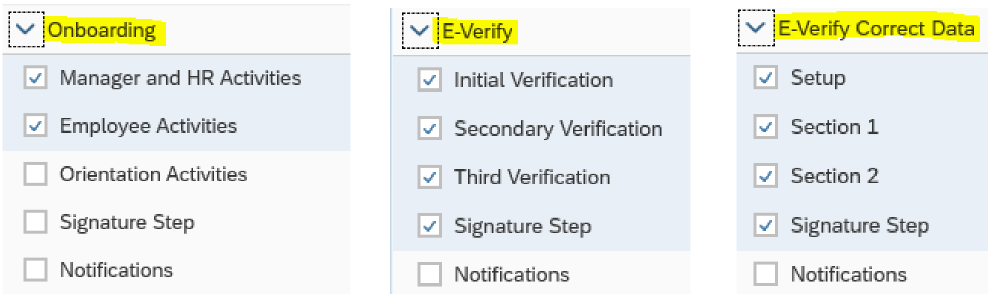
Restarting the Employee Activities, moves the task back to Manager and HR Activities:



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:

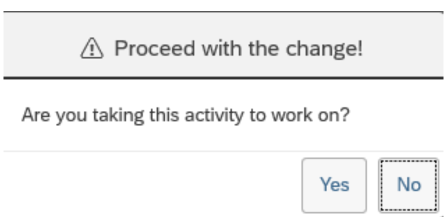


How do I resend the welcome email to the new hire?

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?

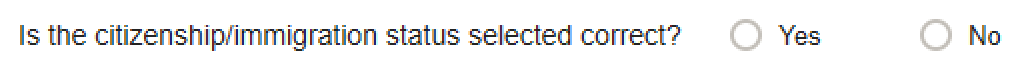
Click on the name of the new hire that you want to take over the activity. A box will pop up asking if you want to proceed with the change. Click Yes.



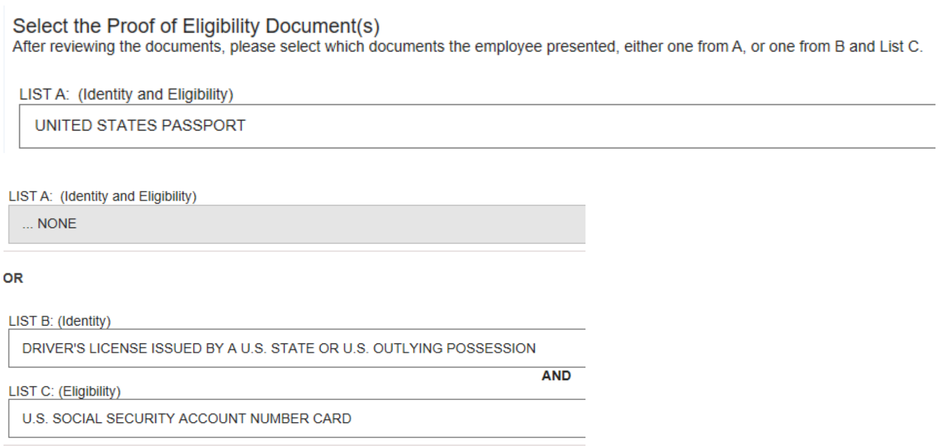
How do I correct data on section 2 of the I9?

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:



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



Select the Proof of Eligibility Document(s)

After reviewing the documents, please select which documents the employee presented, either one from A, or one from B and List C.

LIST A: (Identity and Eligibility)

UNITED STATES PASSPORT

LIST A: (Identity and Eligibility)

... NONE

OR

LIST B: (Identity)

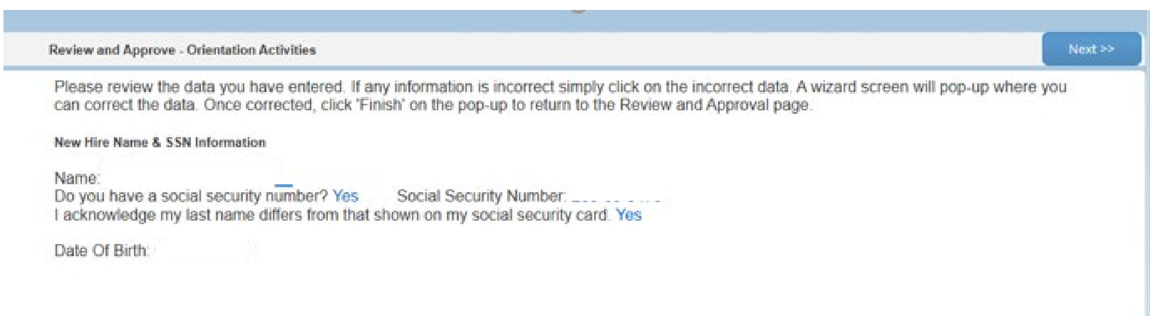
DRIVER'S LICENSE ISSUED BY A U.S. STATE OR U.S. OUTLYING POSSESSION

AND

LIST C: (Eligibility)

U.S. SOCIAL SECURITY ACCOUNT NUMBER CARD

Review Name, SSN, date of birth. If information is incorrect, click on the incorrect data and update



Review and Approve - Orientation Activities

Next >>

Please review the data you have entered. If any information is incorrect simply click on the incorrect data. A wizard screen will pop-up where you can correct the data. Once corrected, click 'Finish' on the pop-up to return to the Review and Approval page.

New Hire Name & SSN Information

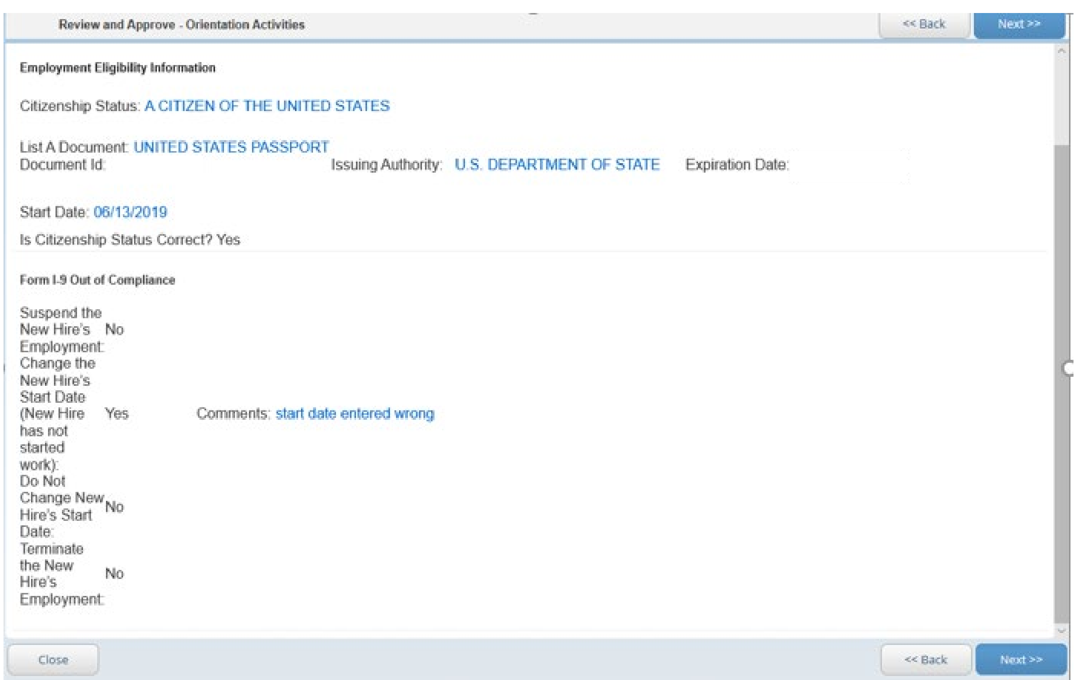
Name:

Do you have a social security number? Yes Social Security Number:

I acknowledge my last name differs from that shown on my social security card. Yes

Date Of Birth:

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



Review and Approve - Orientation Activities

<< Back Next >>

Employment Eligibility Information

Citizenship Status: A CITIZEN OF THE UNITED STATES

List A Document: UNITED STATES PASSPORT

Document Id: Issuing Authority: U.S. DEPARTMENT OF STATE Expiration Date:

Start Date: 06/13/2019

Is Citizenship Status Correct? Yes

Form I-9 Out of Compliance

Suspend the New Hire's Employment: No

Change the New Hire's Start Date (New Hire has not started work): Yes Comments: start date entered wrong

Do Not Change New Hire's Start Date: No

Terminate the New Hire's Employment: No

Close << Back Next >>

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 Completor. 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.

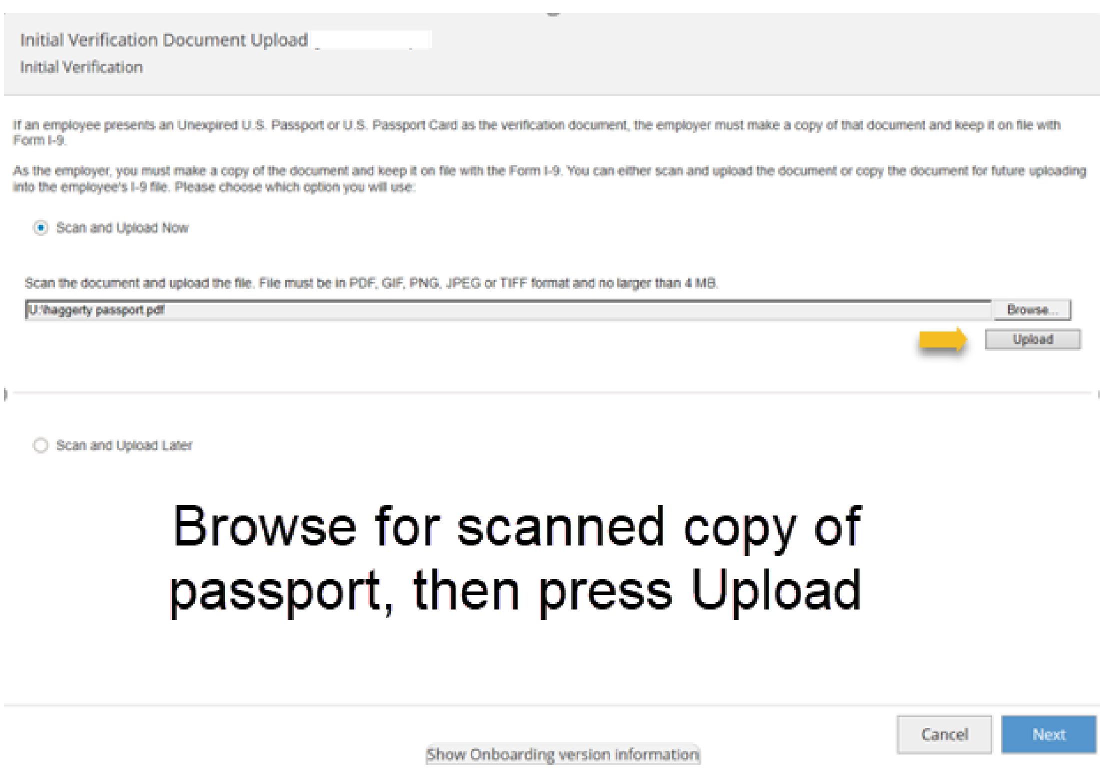
Please contact the HRIC at 684-5600 for any e-verify case that does not return an Employment Authorized result or states Verification in Process before you attempt to resolve and close the case.

Troubleshooting Tips: E-Verify Process

How do I complete the photo matching steps?

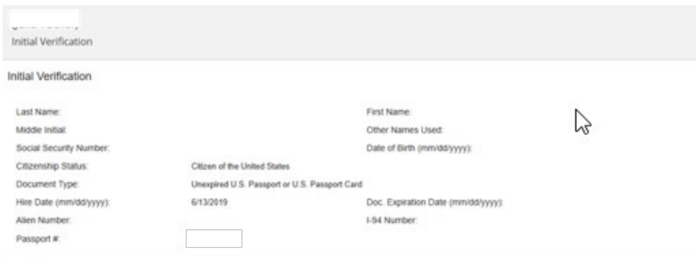
The Photo Matching step is required when an employee is using a document from list A, such as a U.S. passport, permanent resident ID card, or EAD (I-766) employment authorization document. We are required to confirm the image on the document and to keep a copy of these documents.

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

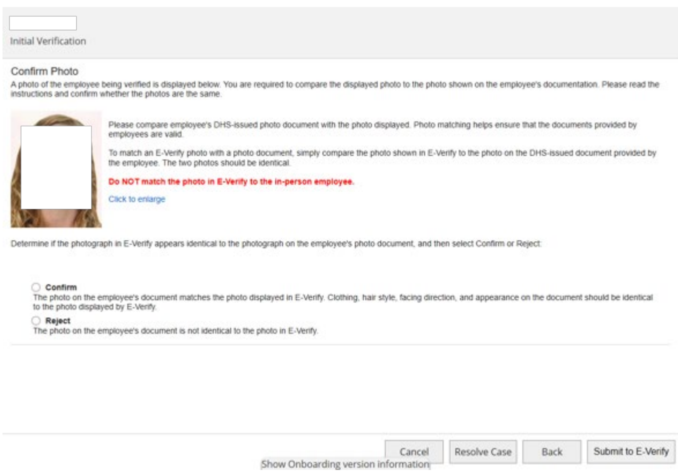


Check to make sure the document successfully loaded:

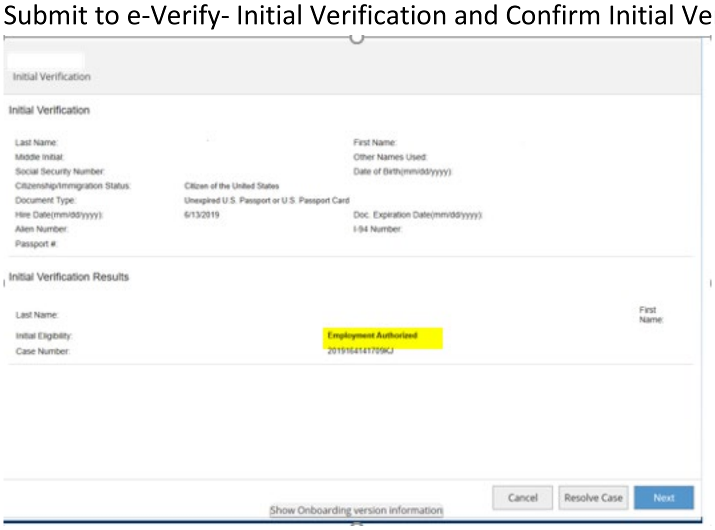
Initial Verification Screen displays:



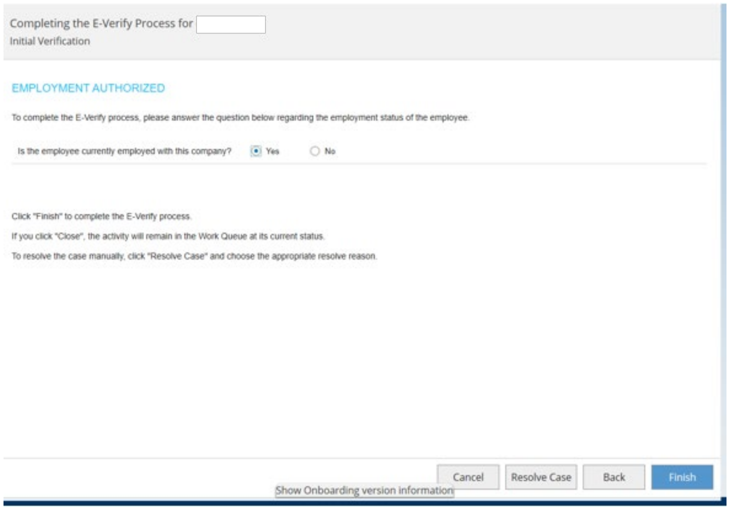
Next, it will ask you to confirm photo: Click the Confirm button even if no image appears.



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



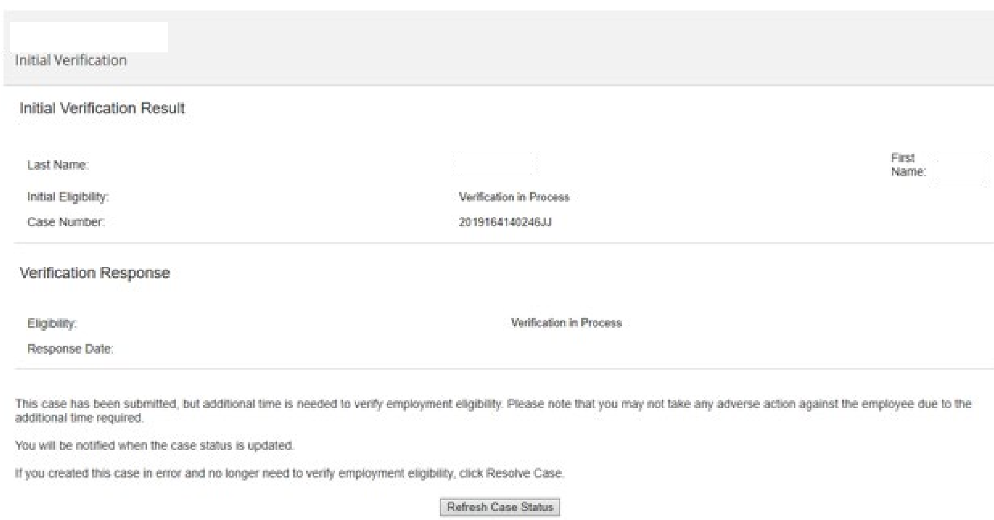
Complete the E-Verify step by answering employment question and closing case. Is the employee currently employed with this company? Answer YES Click on Finish to exit Form I9 Section 2 onboarding



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.

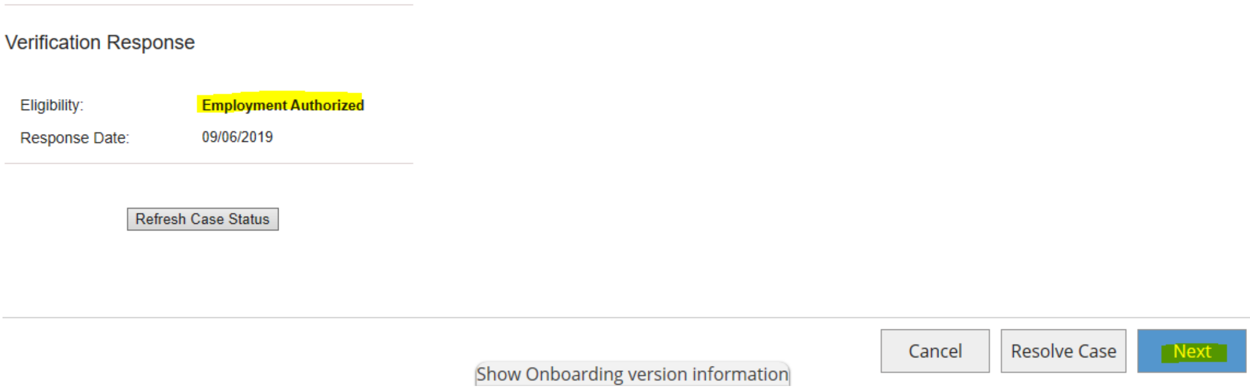


I still have a task showing up under e-Verify even though employment was authorized. How do I complete this task?

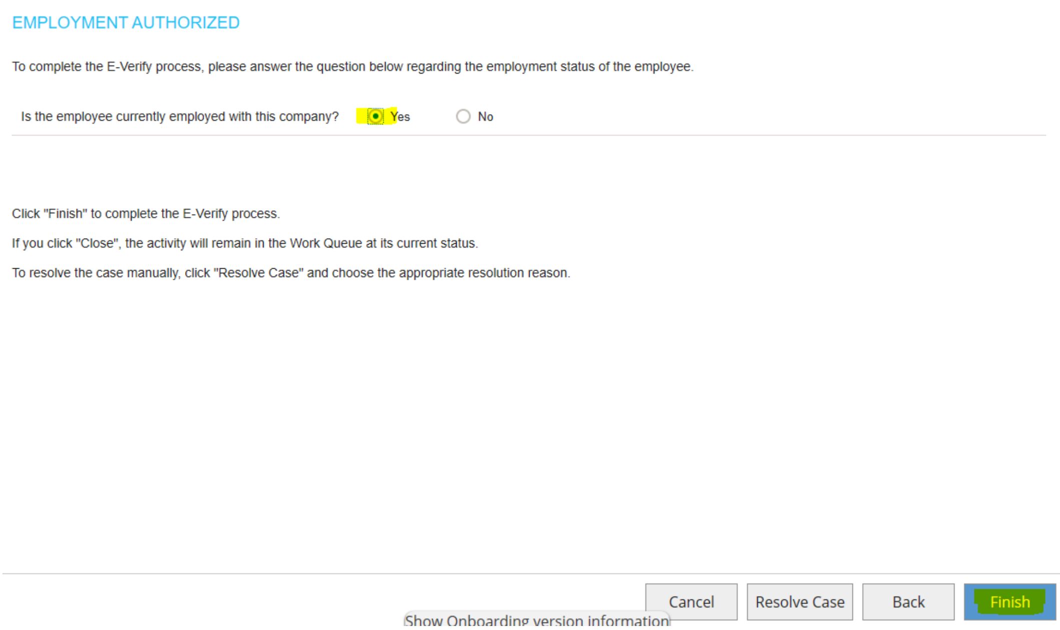
Tasks (1)	Assigned To	Hiring Date	Case Number	Emp ID	Case Status
[redacted] Secondary Verification	LOLA YELVERTON	Sep 1, 2019	2019248210619MC	xxx-xx-6937	EMPLOYMENT AUTH...

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



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.

Complete/Resolve the E-Verify Process
Initial Verification

Is the employee currently employed with this company? (•) Yes ( ) No

Request Closure Options

Cancel | Back

Make sure you select the reason, "The employee continues to work for the employer after receiving an Employment Authorized result."

Please select the appropriate option below to complete or resolve the E-Verify process for this employee. Note that option(s) not applicable at this time have been disabled.

- ( ) The case is being closed because DHS or SSA instructed this employer to close the case.
- ( ) The case is being closed because the document is expired.
- (•) The employee continues to work for the employer after receiving an Employment Authorized result.
- ( ) The case is being closed because the data entered is incorrect.
- ( ) The case is a duplicate because the employer created a case with the same data within the past 30 days.
- ( ) The case is being closed because another case with the same data already exists.

Then, click on the Submit Resolve Case button:

Cancel | Back | Submit Resolve Case

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?

Please select the appropriate option below to complete or resolve the E-Verify process for this employee. Note that option(s) not applicable at this time have been disabled.

- ( ) The case is being closed because the document is expired.
- ( ) The case is being closed because DHS or SSA instructed this employer to create a new case for this employee.
- ( ) The employee continues to work for the employer after choosing not to contest a Tentative Nonconfirmation.
- ( ) The employee was terminated by the employer for choosing not to contest a Tentative Nonconfirmation.
- ( ) The case is being closed because another case with the same data already exists.
- ( ) The case is being closed because the data entered is incorrect.
- ( ) The case is being closed because DHS or SSA instructed this employer to close the case.

Please select the appropriate option below to complete or resolve the E-Verify process for this employee. Note that option(s) not applicable at this time have been disabled.

- ○ The case is being closed because the document is expired.
- ○ The employee was terminated by the employer for reasons other than E-Verify.
- ○ The case is being closed because another case with the same data already exists.
- ◉ The case is being closed because the data entered is incorrect.
- ○ The case is being closed because DHS or SSA instructed this employer to close the case.

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?

Tasks (1)	Assigned To	Hiring Date	Case Number	Emp ID	Case Status
[redacted] Initial Verification	Me	Sep 9, 2019		xxx-xx-6255	

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.

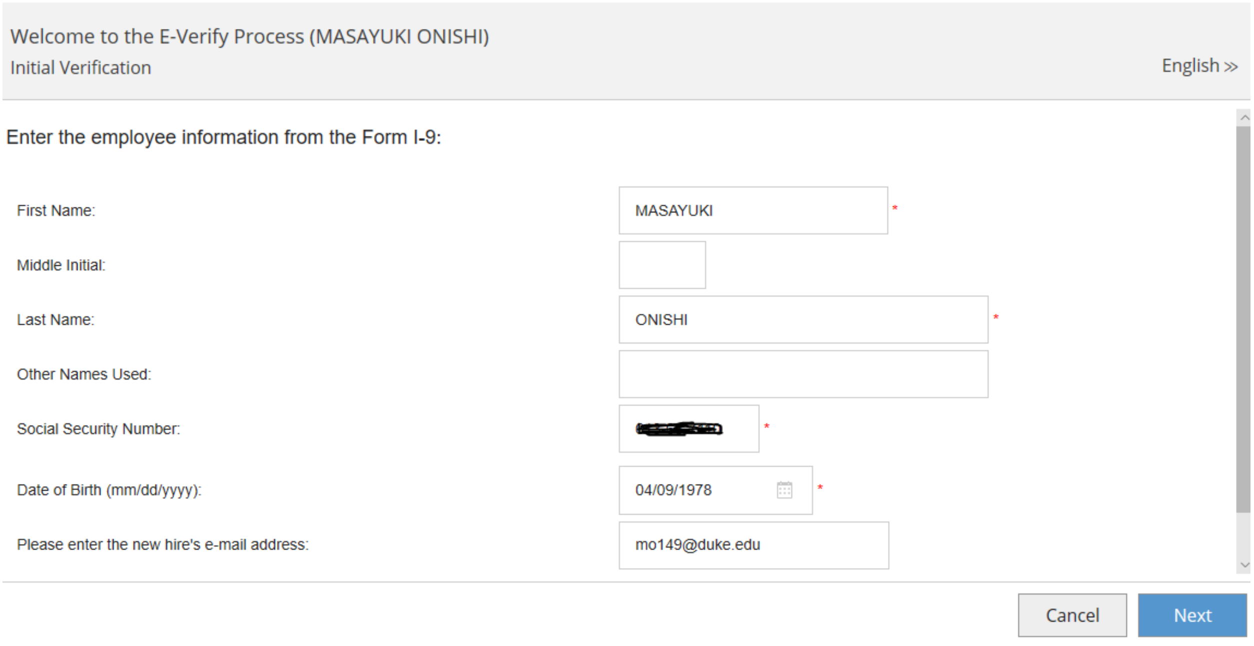
Initial Verification Document Upload (

Initial Verification

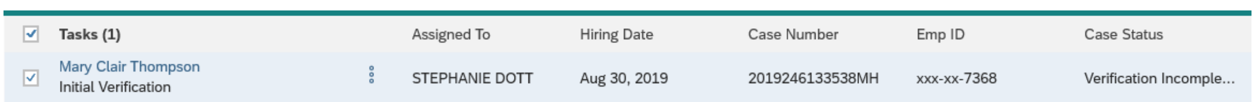
If an employee presents an Employment Authorization Document (Form I-766) as the verification document, the employer must make a copy of that document and keep it on file with Form I-9.

As the employer, you must make a copy of the document and keep it on file with the Form I-9. You can either scan and upload the document or copy the document for future uploading into the employee's I-9 file. Please choose which option you will use:

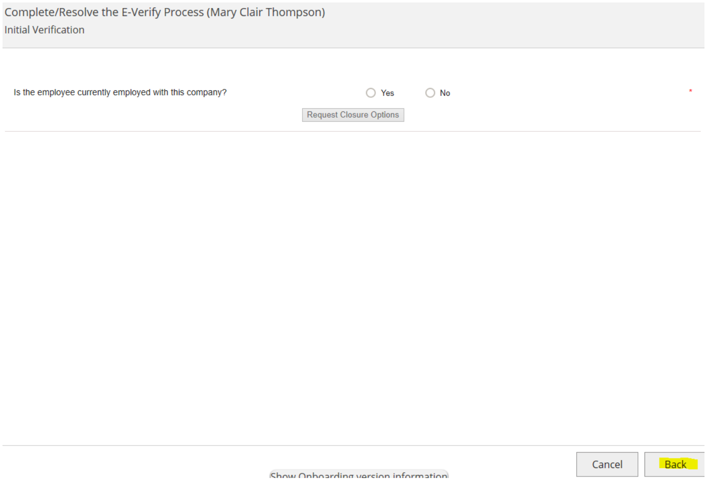
- ○ Scan and Upload Now
- ○ Scan and Upload Later



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.

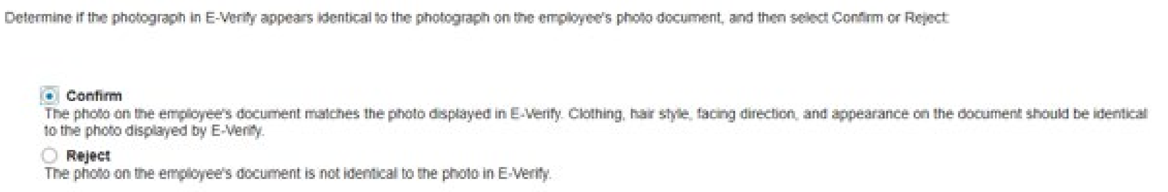

Complete/Resolve the E-Verify Process (Mary Clair Thompson)
Initial Verification

Is the employee currently employed with this company? Yes No *

Request Closure Options

Show Onboarding version information

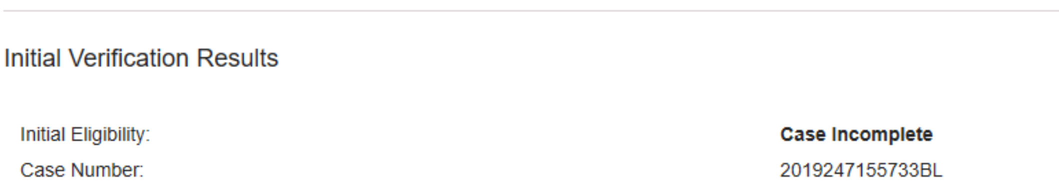
Cancel Back


Determine if the photograph in E-Verify appears identical to the photograph on the employee's photo document, and then select Confirm or Reject:

Confirm
The photo on the employee's document matches the photo displayed in E-Verify. Clothing, hair style, facing direction, and appearance on the document should be identical to the photo displayed by E-Verify.

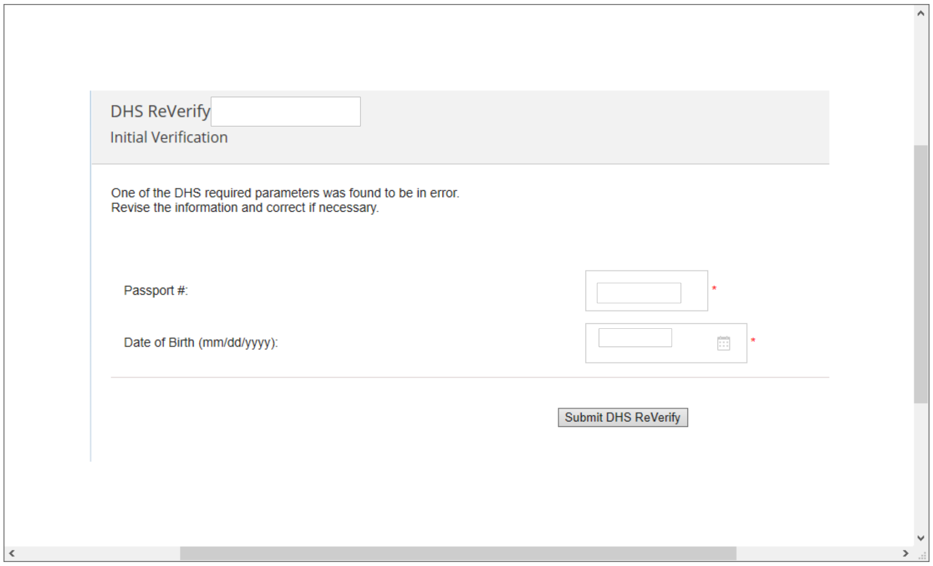
Reject
The photo on the employee's document is not identical to the photo in E-Verify.

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

Initial Eligibility:	**Case Incomplete**
Case Number:	2019247155733BL

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.

If the new hire does not remember their onboarding password, the Onboarding Coordinator will need to submit an OIT help desk ticket to the iforms team so they can reset the onboarding password back to the default: onboardingPW77

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.