SuccessFactors: Recruiting/Onboarding Quick Reference Guide

EMPLOYEE ACTIVITIES

Last Revised: 12/14/2023

Duke | HUMAN RESOURCES

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Overview

Welcome to SuccessFactors! This Quick Reference Guide (QRG) will provide information for members of the Onboarding Team about the employee activities that are completed by the candidate. This is guide is not intended to help candidates complete the activities, rather to provide the Onboarding Team with an overview of the steps. This information will be helpful to all members of the Onboarding Team. Most likely the Onboarding Coordinator is the one working with candidates to complete the process.

For additional details on working with SuccessFactors, online training videos are available and be can found on the Manager's Section of the HR Website under Recruitment and Hiring via the following link:
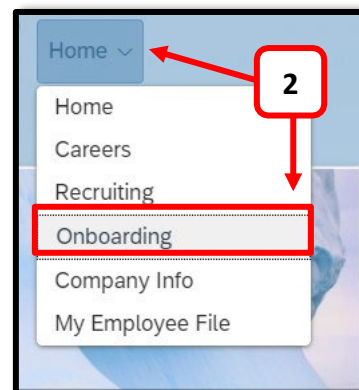
https://hr.duke.edu/managers/recruitment/successfactors.

ACCESSING ONBOARDING

1. The tool is accessible via the Duke@Work portal**.** Click the **SuccessFactors** tab.

2. On the homepage, click **Home** and navigate to **Onboarding**.
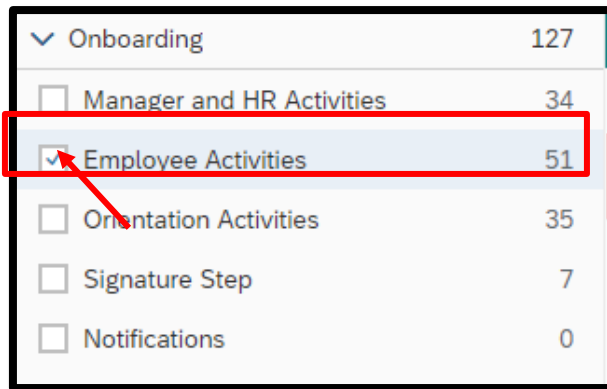
ONBOARDING TEAM

The Onboarding Team is comprised of the Hiring Manager, HR Representative and the Onboarding Coordinator that are associated with the requisition coming from recruiting or the Hire iForm coming from iForms.

ONBOARDING DASHBOARD (NEW VIEW)

From the Onboarding Dashboard, you use the checkbox to display tasks in the Employee Activities step. This indicates the Onboarding Team has completed the Manager and HR Activities step and the candidate was sent an email welcoming them to Duke with a hyperlink to the new employee wizard.

The step name is also displayed under the candidate name.

The candidate will have received the following email with a hyperlink to the **Onboarding Portal**. Transfers receive a similar email but have a much shorter set of items to complete. Once the candidate selects the hyperlink, they will be directed to the Onboarding Portal to set their password and security questions similar to what is noted in the Onboarding Overview and Basic Navigation guide.

This is a one-time use password used for returning to the Onboarding Portal to complete the activity. It is not used to authenticate to any Duke system. Once the password is established, the candidate will be stepped through a list of forms.

DocuSign

The candidate will sign the forms using the external service from DocuSign. After completing the documents, they will be presented with the following panel.
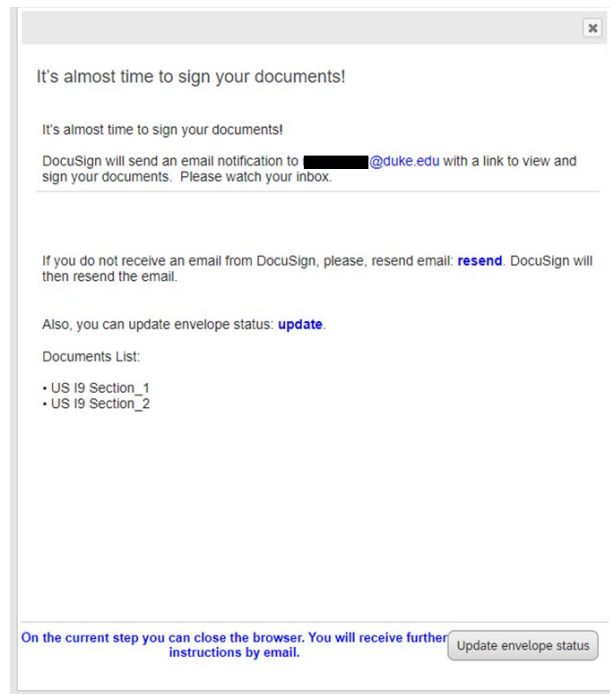
The email will come from will come from careers@sign.onboarding.duke.edu and includes the following branding. Click on the Review Document link and follow the instructions to sign the documents.
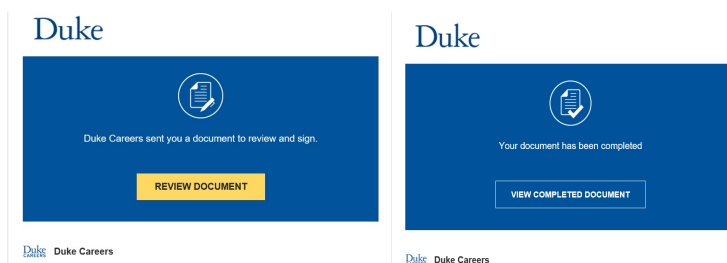
On completion you will receive another email as noted to the right above. The documents can be download for your records in either step.

SAMPLE: ONBOARDING EMAIL

Welcome to Duke!

Duke's name and reputation have been forged through the extraordinary work of people like you, people who have dedicated their careers to make a difference in the lives of those around us.

The work we do changes lives – the lives of students, patients, and the countless benefactors of research being performed each year. You are now part of Duke's legacy of great achievement and even greater promise. We are bound together by our core missions and the values we uphold in support of them.

There is much to do, and we're glad you will be part of our team. In the coming weeks, you will receive lots of information and support to help you get started in your career at Duke. But first, we need you to complete several new hire forms through the Onboarding Portal. The portal can only be accessed from a desktop/laptop computer rather than a mobile device.

We are also required by federal regulations to verify employment eligibility for all new hires within three working days of their date of employment. Please make sure you bring the identification you selected with you to have it verified by a departmental representative.

As we continue to navigate the COVID-19 pandemic, we are all doing our part to reduce the spread of the virus and protect our community. Newly hired Duke employees are required to have at least a single dose of a COVID-19 vaccine or a Duke-approved medical or religious exemption prior to their start of work date. See the COVID Vaccine website for details on the requirements for COVID vaccination and booster shots.

You will find more information about this and other useful tips, guidance and resources on the New to Duke page of the Duke Human Resources website.

Welcome to Duke. Let's get started.

Sincerely,

Duke University and Duke University Health System Leadership

Welcome to the New Employee Wizard JB Duke

Employee 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:

- 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
- Setup direct deposit
- Equal Employee Opportunity Report (EEO-1)
- W2 Online Election
- Review of Employee Handbook
- Confidentiality 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 will electronically sign a subset of the documents and have the opportunity to download copies for your records.

PLEASE NOTE:

- SSNs and dates of birth will prepopulate from the background check and will need to be confirmed by the candidate.

- The Physical and Mailing address will default from the job application. If they are relocating for the position and know that new address, they should use that address.

The wizard saves each form as they are completed and the candidate does not have to complete all forms in one session.

Candidates will use "**Cancel**" to exit the wizard, "**Next**" to move to the next form and "**Back**" to move to the previous form in the wizard. The candidate will have a chance to review and edit all forms before making a final submission.

Signatures are managed externally by DocuSign which is launched from an email. See the section above for more detail.

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