

Navigating the Onboarding Dashboard

Overview

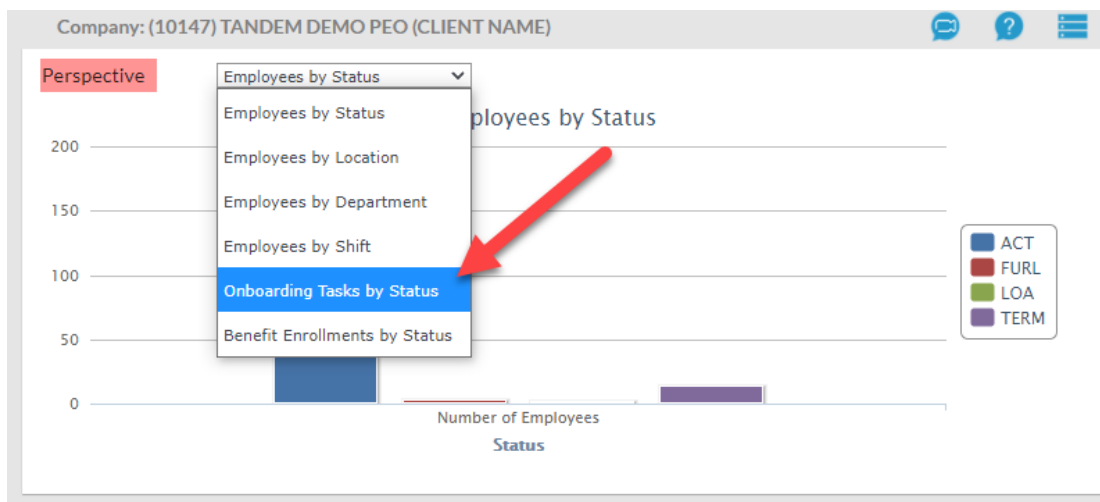
Worksite managers will use the Onboarding Dashboard to view the status of their company's new hires.

Navigate to **My Home** by following the menu path:

My Company > My Home



Adjust the Perspective by clicking on the drop-down menu and selecting **Onboarding Tasks by Status**



Adjust the **TWO** available filters to the information you wish to see.


The screenshot displays the 'Onboarding Tasks by Status' view in Tandem HR. At the top, there are filters for 'Perspective' (set to 'Onboarding Tasks by Status') and 'Show' (set to 'Active'). A 'Tasks' filter is also visible, set to 'I-9 Section 1'. A pie chart indicates 'Past Due, 5' tasks. Below the chart is a table with the following data:

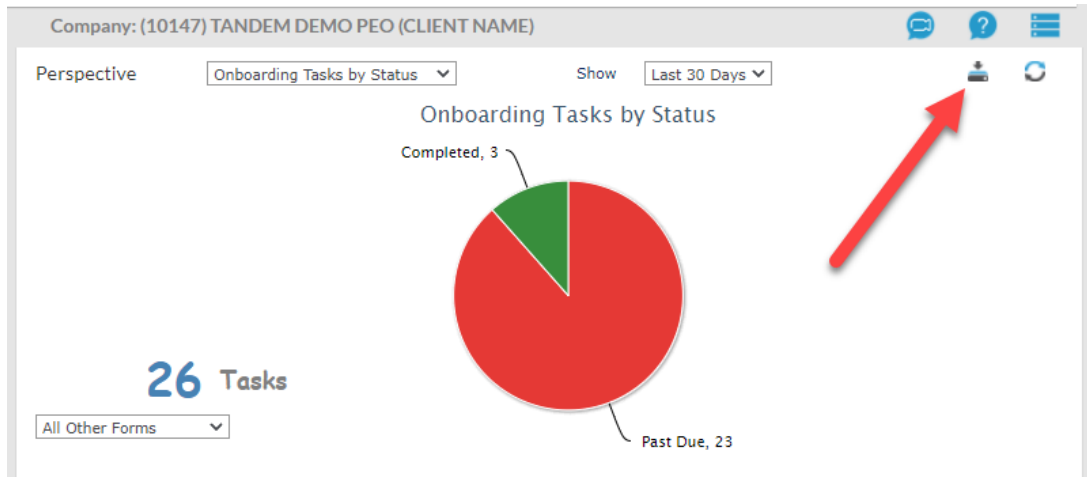
Performer	Due Date	Submit Date	Status	Actions
JOHNSON, JAMES	03/14/2019		Past Due	Actions ▼
Madison, James	07/27/2020		Past Due	Actions ▼

Show – Allows you to filter between **Currently Active** or **Active within the last 7 or 30 days**

Tasks – Allows you to filter by the available form options shown. An outstanding form is referred to as a **Task**. We recommend filtering through all **Tasks** if you cannot find information on an individual in one of the selections – you may find them in a different filtered list.

Note: The filters will adjust to **Show: Active and **Task: I-9 Section 1** by default.*

Once adjusted to your preferred view you may choose to Export the data as an Excel Spreadsheet by clicking on the Export Icon .



If a candidate needs to be removed from the onboarding process (ex: candidate withdrew offer of employment or did not start), please contact your Human Resources Business Partner or Your Solution Center to remove the candidate from the onboarding process.

Questions?
Your Solution Center is available to assist you
Monday – Friday, 8:00 a.m. – 5:00 p.m. CT
Call: 630.468.9298
Email: YourSolutionCenter@TandemHR.com
Chat live: www.TandemHR.com