NEOGOV ONBOARD – EMPLOYEE/MANAGER TRAINING GUIDE	
Objective:	This Training Guide focuses on how to navigate within NEOGOV Onboard and perform the routine employee and manager tasks for new hires.

Pre-Requisite Requirements:

- New Hires have been authorized in NEOGOV Insight and the nightly feed has auto-created the pending hire in HRMN.
- New Hires have been loaded to Onboard and activated.

Helpful Tips:

- Clicking on the NEOGOV icon in the upper left-hand corner always returns a user to their Unified Dashboard.
- A checklist is a collection of forms the new hire will be filling out and/or reviewing. Each will be assigned a Standard Forms checklist. Each form has different due dates, based on the information being provided.
- Each new hire will have a Getting Started portal page (where the checklist displays), an Employment Information portal page (general information applicable to all State employees) and an agency portal page (displaying information specific to their agency).

INDEX: Select hyperlink below to go to information.

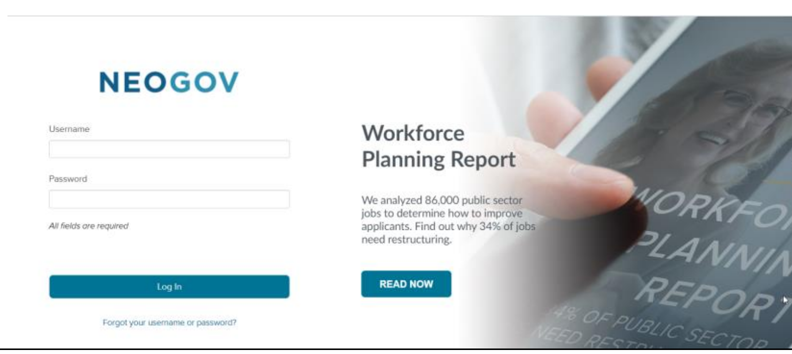
LOGIN

NEOGOV can be accessed by navigating to the following website: https://login.neogov.com

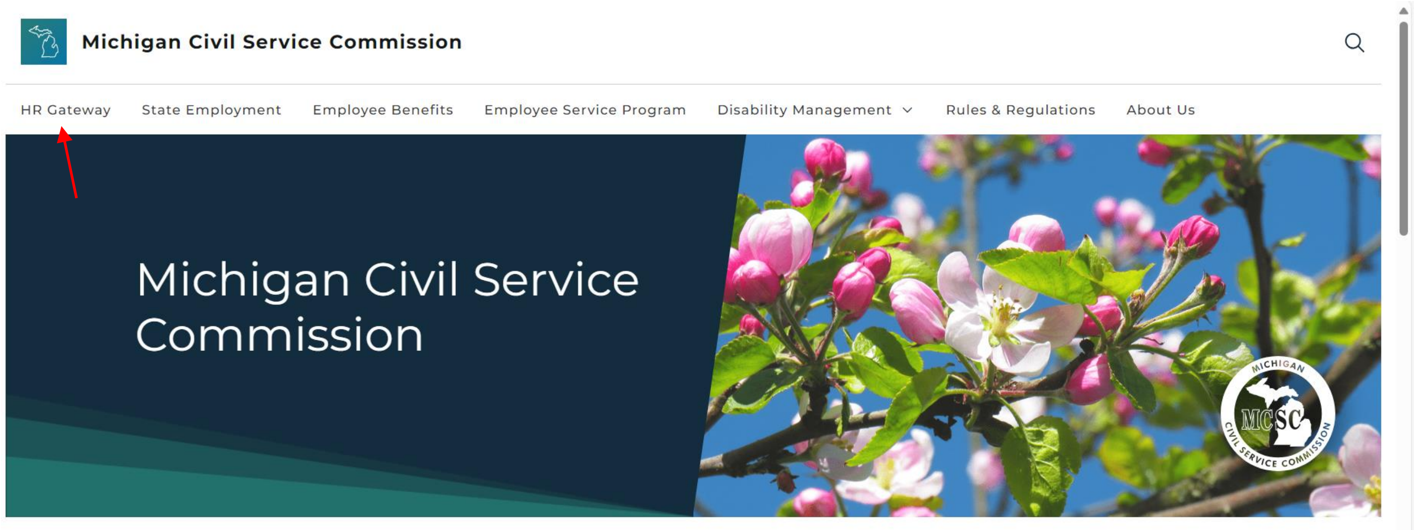
You should have received an **Activate Your NEOGOV Onboard User Account** email with a link to create your account **Password** using your email address as your **Username**. This activation is good for 24 hours and will expire. If you require a new activation, please contact your HR Office or the NEOGOV mailbox at MCSC-NEOGOV@michigan.gov.

> **NOTE: Current NEOGOV Insight and OHC users will use their current Insight and/or OHC username and password.**

1. Log into NEOGOV using your **Username** and **Password.** Click on the **Log In >>** button.
2.

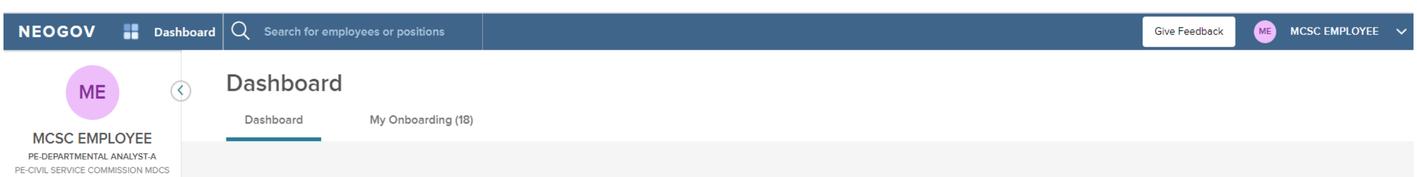


3. The system can also be accessed from the HR Gateway page Gateway on the Civil Service Commission website.



NEOGOV works best with Chrome.

4. Upon login, the NEOGOV Unified Dashboard will display. This dashboard centralizes tasks and actions for managers and employees across their talent management suite (TMS) in one place, effectively eliminating the toggle to switch between products. Managers and employees can now access information across Insight/OHC, Onboard, and Perform in a one-stop shop.

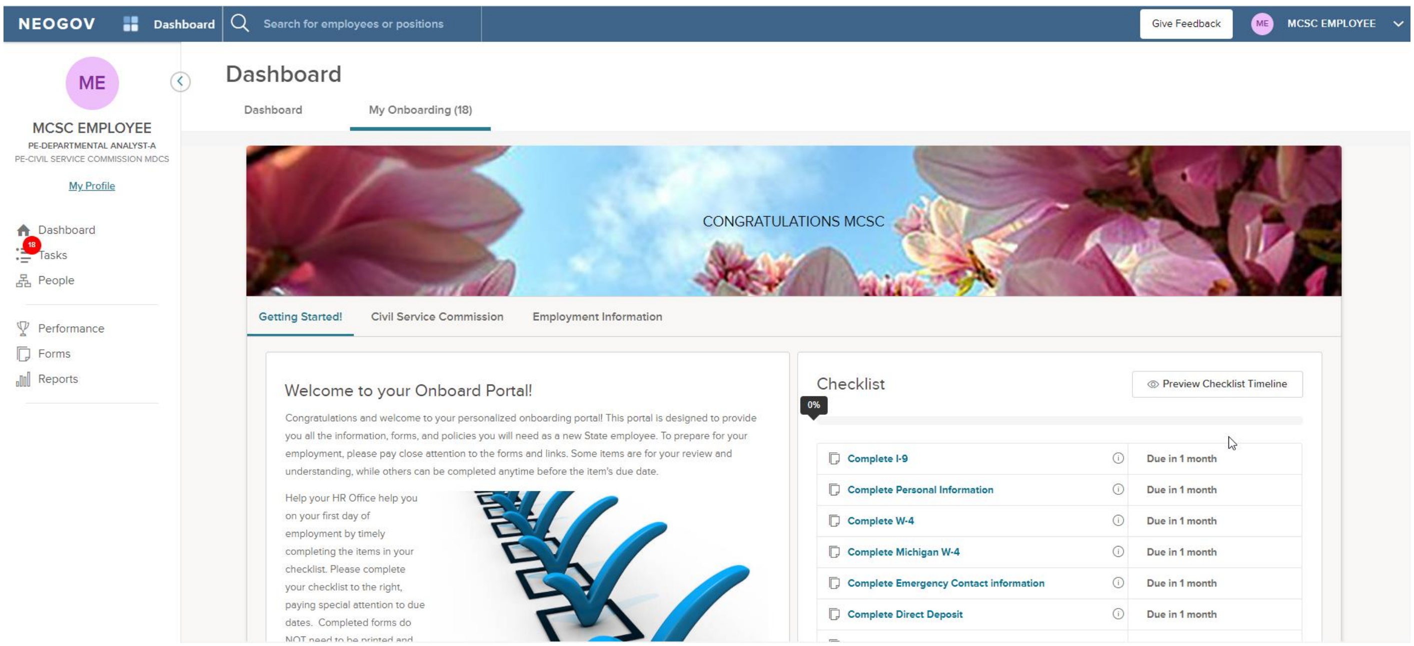


Dashboard - All

1. Upon login, employees with any outstanding Onboard tasks will automatically view their **Onboarding** tab. Within the **Onboarding** tab you will see your **Portal** pages (middle links under Congratulations) and **Checklist** items (middle right).

2. The **Getting Started** portal will always return you to your **Onboarding** screen. The **Employment Information** portal will provide general employment information. Your agency-specific portal page (i.e. Civil Service Commission, below) will provide you with links, information and forms specific to the agency in which you will be working. Please be sure to click on all and review thoroughly.

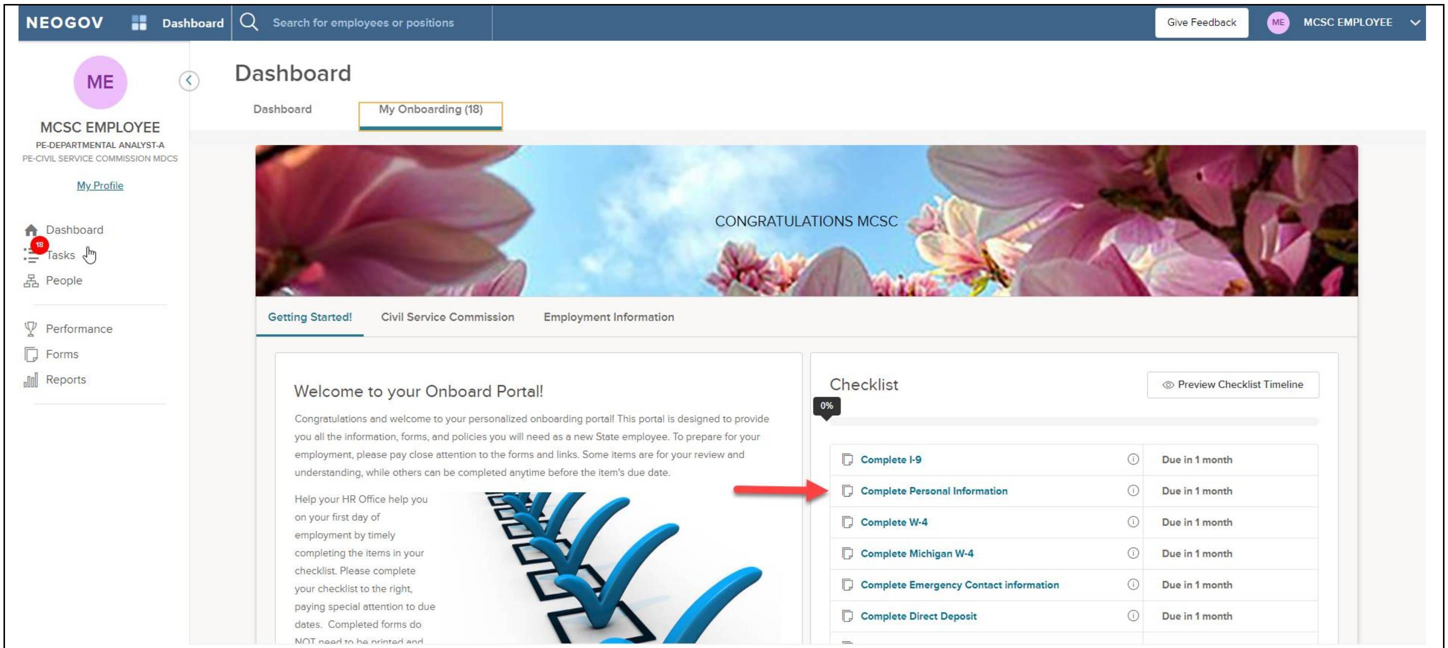
3. Items in the **Checklist** section are forms or information you should review and complete prior to their due date. To review each form, simply click on the name.



Completing Forms

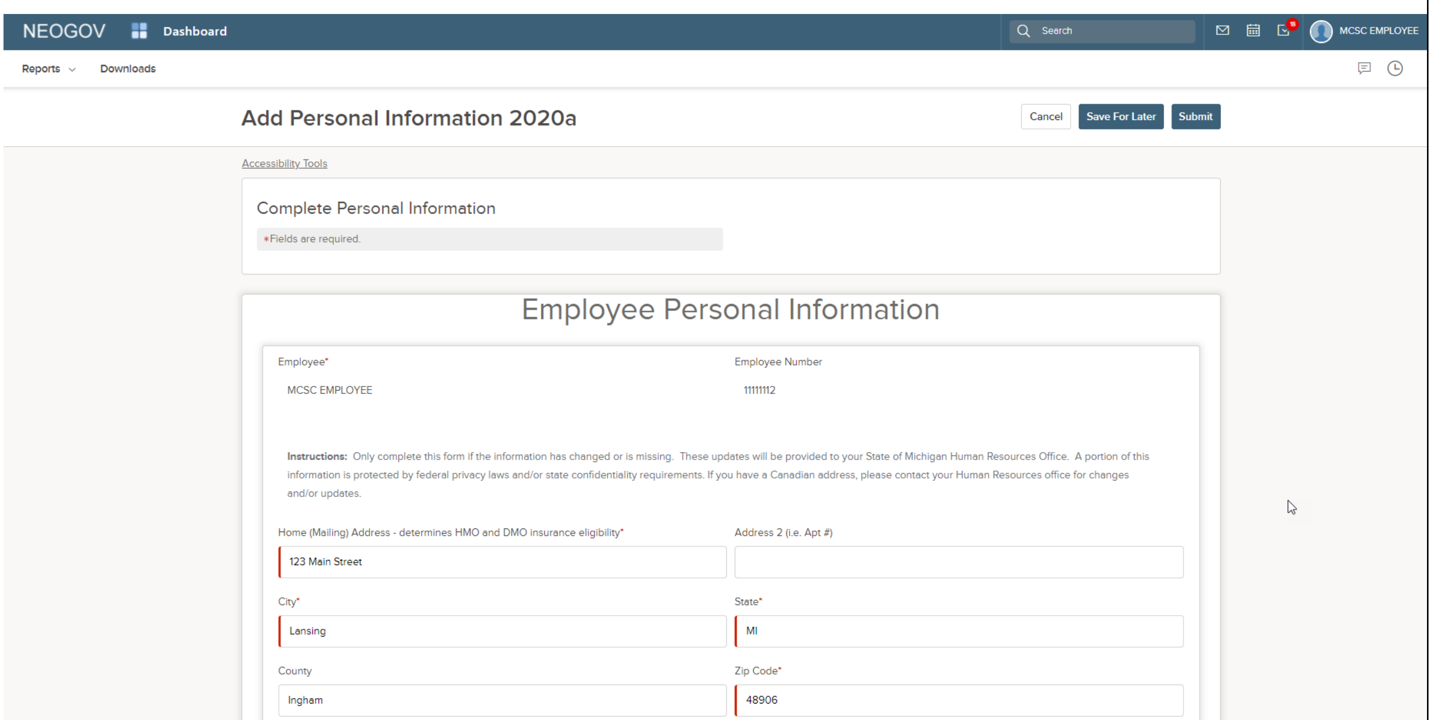
1. Completing any form in Onboarding follows the same process. Select (click on) the form, review the information, fill in the necessary fields, and click Save at the bottom of the form.

2. Within the **Checklist** section, select the form name. For this example, we will use the **Personal Information** form.

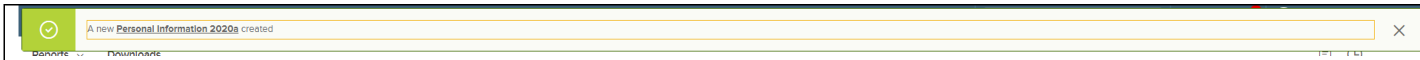


3. Review the information within the form and update/complete any necessary fields.

4. When complete, select **Submit** in the upper-right. Also please note, you can select **Save For Later** in the upper-right to save return to complete your form later.

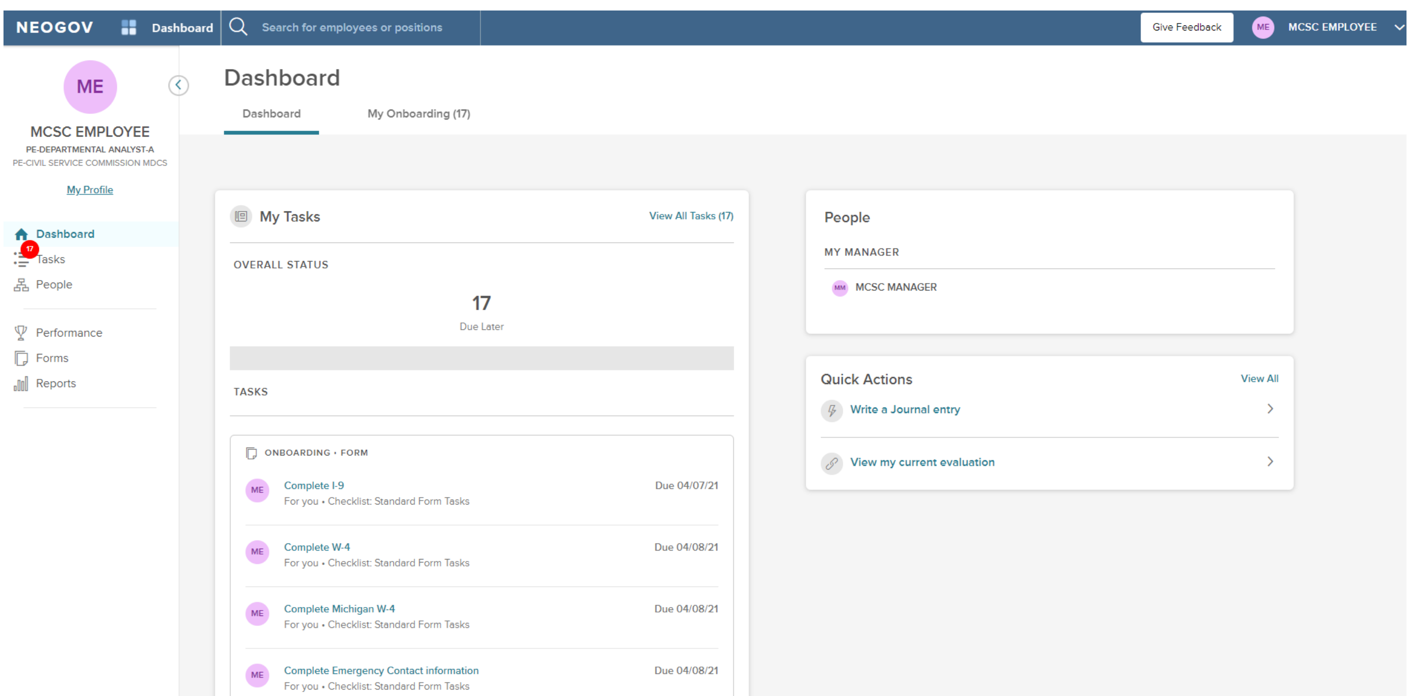


5. A banner will display at the top of your screen that the form was created. You may continue completing each form.

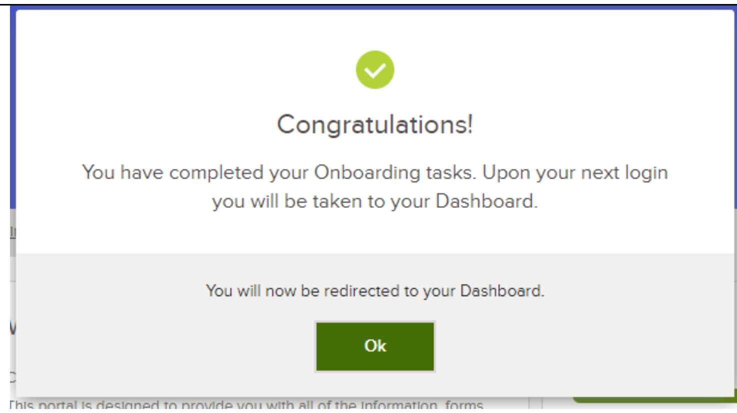


6. Some tips to keep in mind as you are completing forms:
   - Phone numbers should be XXX-XXX-XXXX
   - Dates should be MM/DD/YYYY
   - States should be the two-character abbreviation (i.e. MI for Michigan)
   - For direct deposit information, make sure routing number(s) and account number(s) are correct with no spaces or non-numeric characters
   - Complete all required fields (noted with a red asterisk)
   - Clicking Save submits the form; if you have accidently submitted incorrect data please contact your HR Office representative

7. Outstanding Onboard forms (and any other outstanding tasks) can also be found in the **My Tasks** section of your **Unified Dashboard**. As within My Onboarding, forms can be completed simply by selecting the form name.



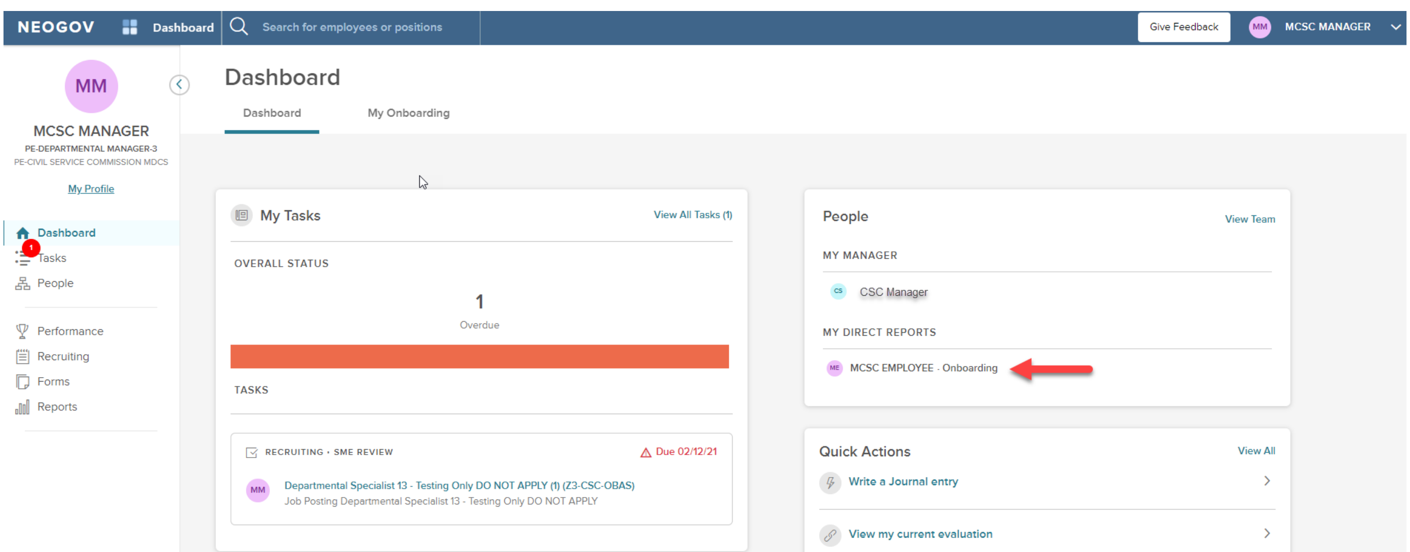
8. Once all forms are completed, you will receive the following message. Click **OK**. You have completed the process!



Dashboard - Managers

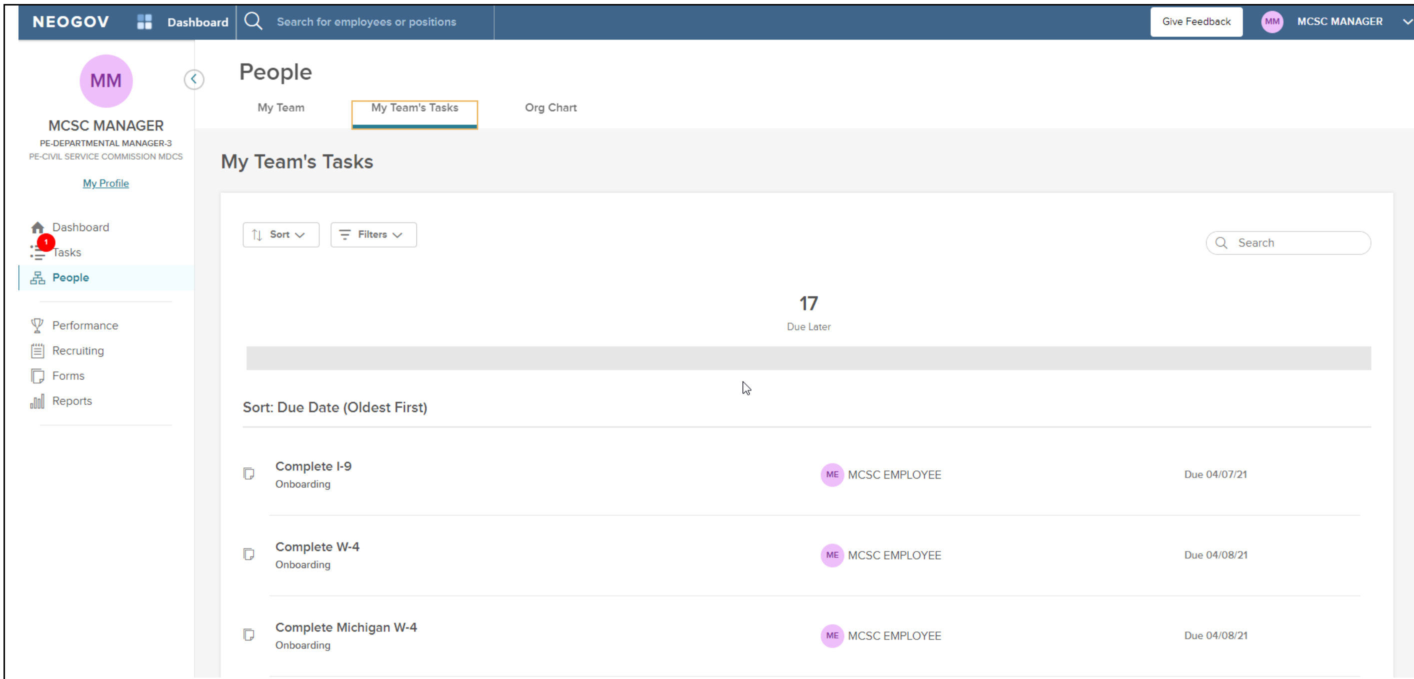
If you are a Manager, the dashboard will have a few additional items available:

1. In the **People** section of your **Dashboard** under **My Direct Reports**, if any of your employees are currently assigned Onboard tasks, **- Onboarding** will display after their name.



2. Further, by selecting the **People** link along the left navigation and then **My Team's Tasks**, outstanding Onboard (and other) tasks will display for your employees.

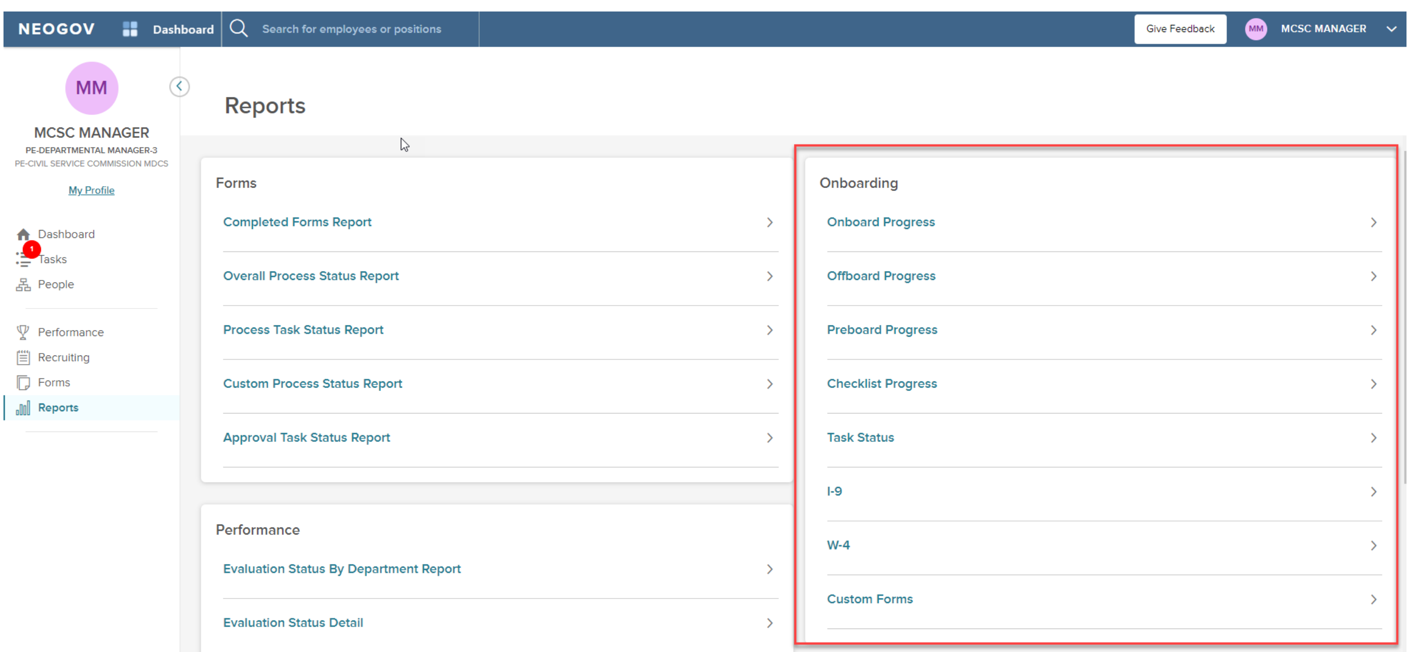
   These tasks can be filtered by **Employee** or **Product**.

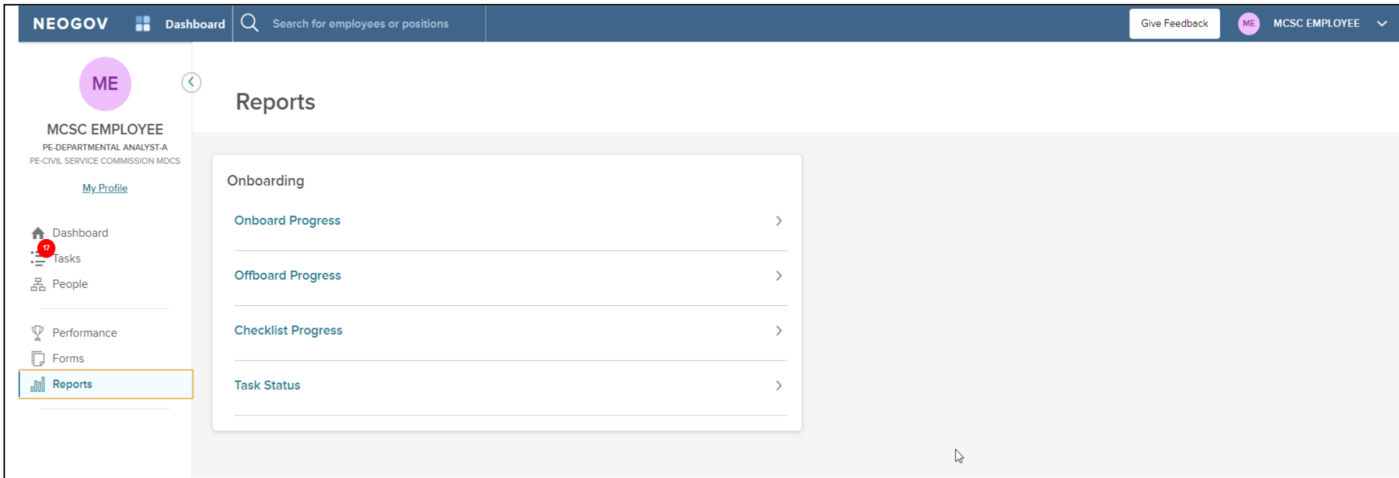


Reports

1. Managers have the ability to run reports on those employees who report directly to them. Employees may run Onboard reports on themselves.

2. Along the left navigation, select **Reports**. **Onboarding** reports display on the right. Several report options are available for managers. For employees, **Onboard Progress**, **Offboard Progress**, **Checklist Progress** and **Task Status** display.





3. The **Onboard Progress** report displays the percentage status complete for each employee who has been assigned a checklist. Users can also add columns and/or filter on **Employee #**, **Employee Name**, **Position**, **Department Code**, **Department Name**, **Division Code**, **Division Name**, **Start Date** and **Checklist Completion.**

4. The **Offboard Progress** report is not being used at this time.

5. The **Preboard Progress** report is also not being used at this time.

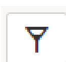
6. The **Checklist Progress** report displays the percentage status complete for each employee who has been assigned a checklist. Users can also add columns and/or filter on **Employee #**, **Employee Name**, **Department Code**, **Department Name**, **Division Code**, **Division Name**, **Position**, **Checklist Name**, **Checklist Completion, Start Date**, and **Separation Date**.

7. The **Task Status** report displays the status of each task and the task assignee. Users can also add columns and/or filter on **Employee #**, who the task is **Related To**, **Department Code**, **Department Name**, **Division Code**, **Division Name**, **Position Code**, **Position Name**, **Checklist Name**, **Type**, **Assignee**, **Status**, **Start Date**, **Separation Date**, **Due Date**, **Task Type**, **Updated On, Updated By**, and **Status**.

8. The **I-9** report only displays data for HR Office users.

9. The **W-4** report also only displays data for HR Office users.

10. The **Custom Forms** report displays all State of Michigan specific custom forms, except the Federal I-9 and Federal W-4.

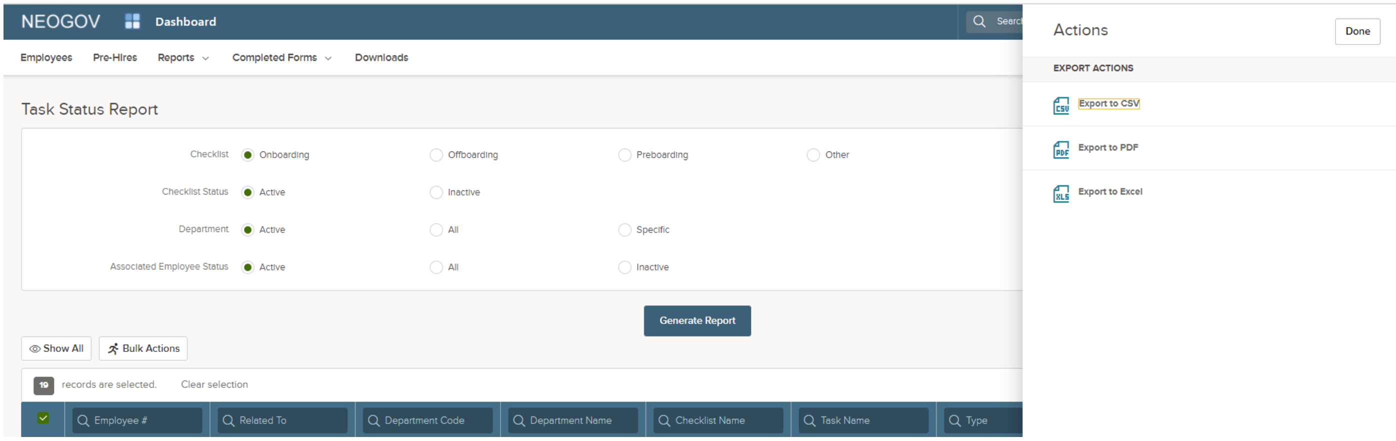
11. Report columns can be added/removed by selecting the  icon.

12. Report column order can be changed by selecting the  icon and dragging it to your desired order.

13. Report filters can be added/removed by selecting the  icon.

14. Report data can also be exported if needed. Place a checkmark in front of each record to export (or all records), select **Bulk Actions** and then either **Export to CSV**, **Export to PDF** or **Export to Excel**.

15. Wait a moment for NEOGOV to build and provide the report.



Return to the Dashboard

Regardless of where you are in NEOGOV, you can always return to your Unified Dashboard by clicking **Dashboard** in the upper left corner of your screen.