Manager Task View

Introducing a new way to handle your Onboarding tasks. . . Manager Task View! This new feature simplifies your experience by guiding you through hiring tasks. See all of your pending work in single area and easily approve tasks on your mobile phone or tablet.

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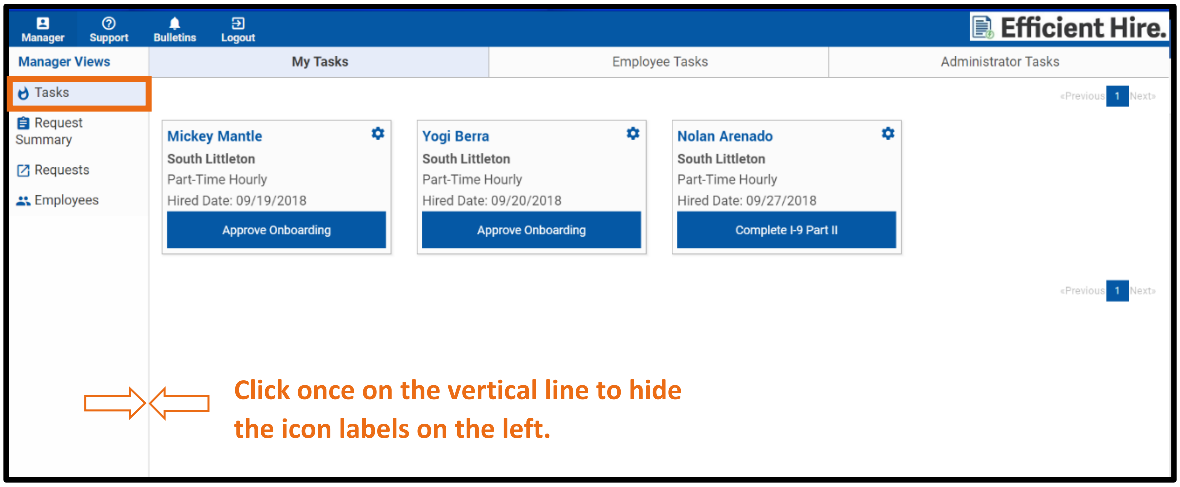
Viewing your Open Manager Tasks

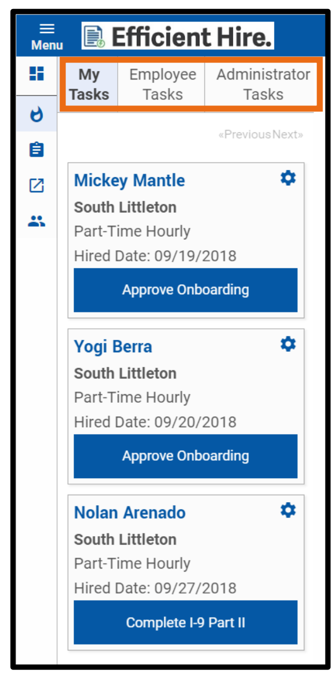
When you login to the Manager Portal, you will now have an additional option called Tasks at the top of your view on the left-hand pane. ***Tasks*** will now be your default view upon logging in. You can still approve employee forms through the Requests view as you have done in the past, however the Tasks view has been added to make approving requests much quicker and easier, so make sure you try it out!



When you click on the Tasks View, you will see the tasks that need to be completed by you. Tasks will be listed in order of the oldest hire date to the newest hire date. Note there are three Task View tabs that are available:

- ***My Tasks*** are the tasks that are ready to be completed by you. You will only be able to complete these tasks.
- ***Employee Tasks*** are the ready to be completed by the employee.
- ***Administrator Tasks*** are ready to be completed by the administrator.

The task buttons indicate the next step in the approval process. In the screenshot to the right, you can see that approved and Nolan Arenado's is ready for the Manager to complete part II of the I-9.

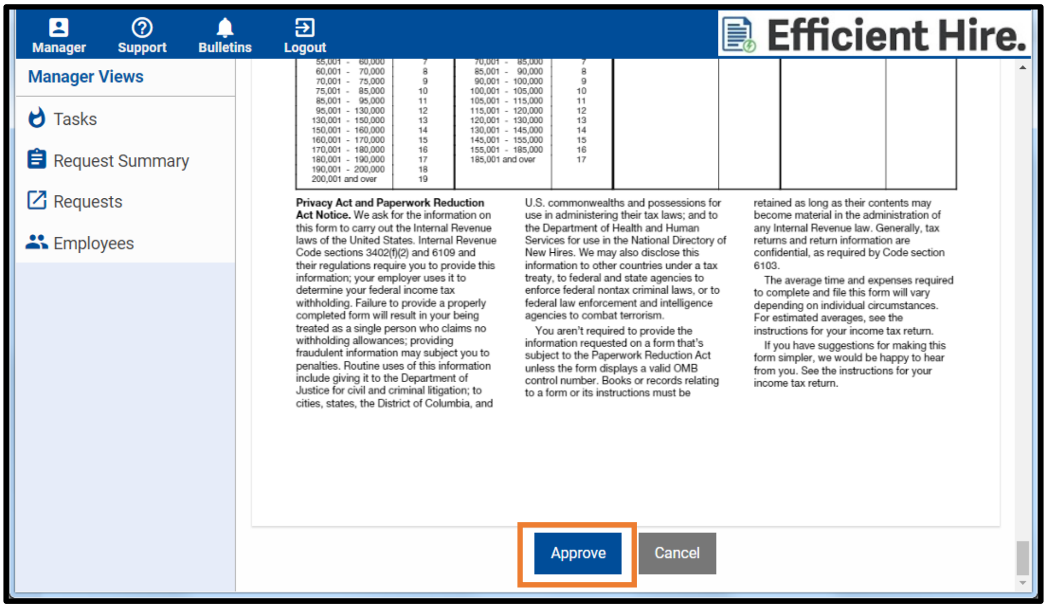


It is now easier to approve forms from your smart phone or tablet! You never need to leave the front line to complete your part of the process.

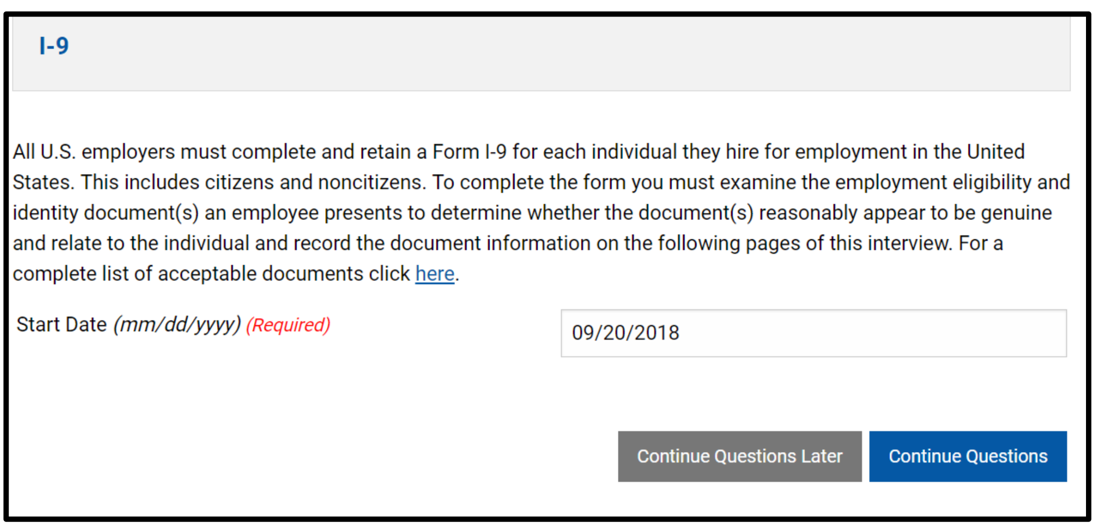
Approving Forms – Onboarding, I-9 and WOTC

Approve Onboarding

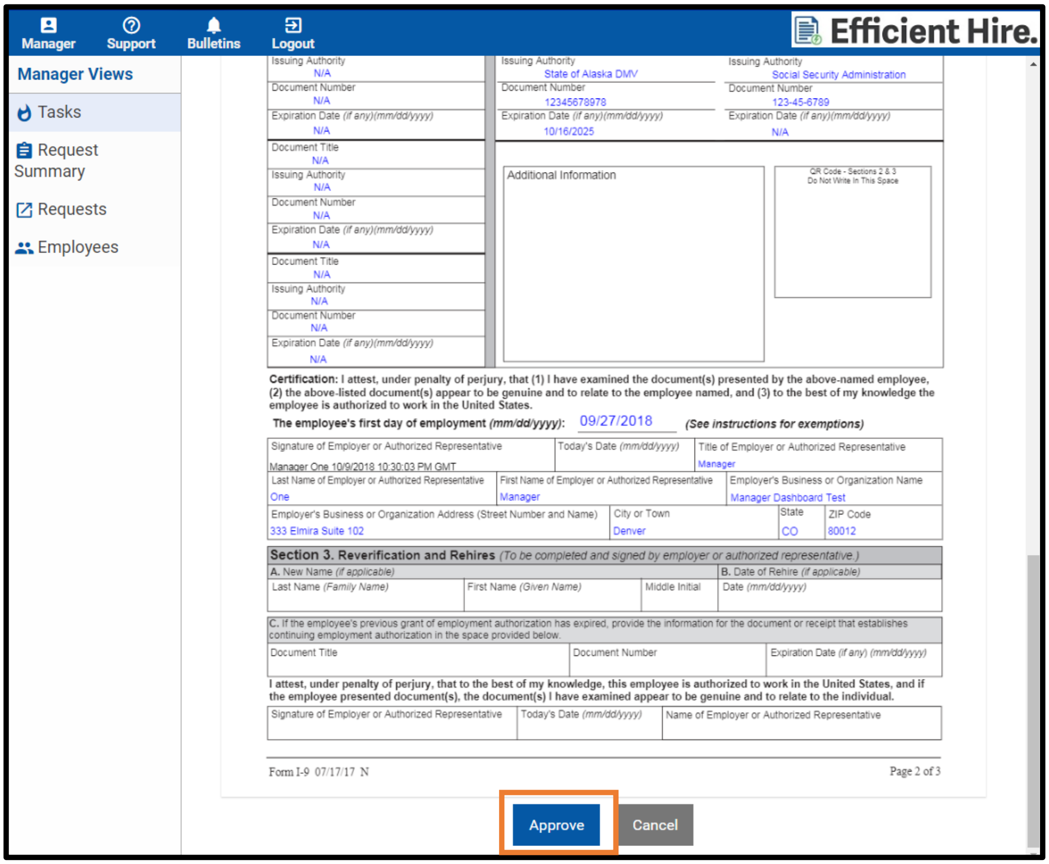
If you click on the **Approve Onboarding** button, the employee's onboarding forms will be displayed for your approval. Review the forms by scrolling down and click **Approve** at the bottom of your screen to completely approve the forms.



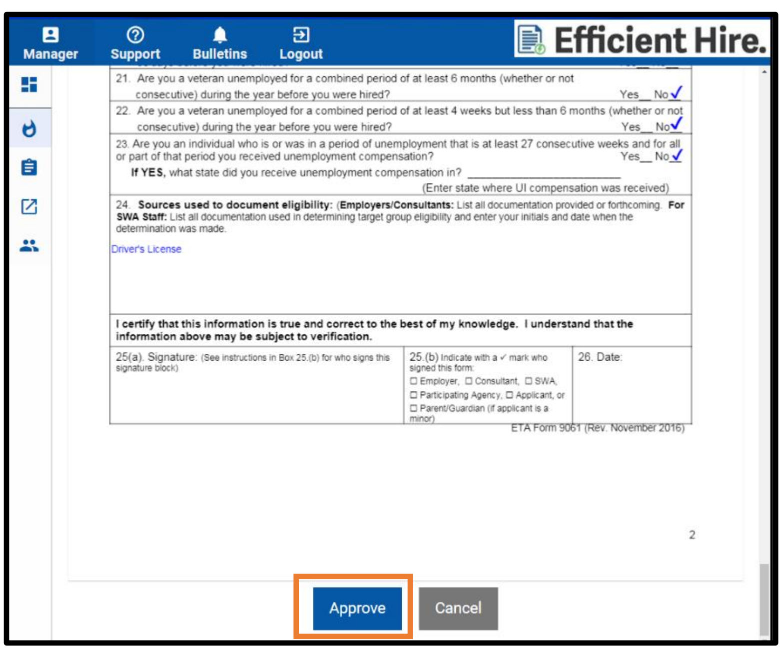
After approving the employee's Onboarding forms, you will be immediately taken to part II of the I-9 to enter identification documents and submit the employee to E-Verify if applicable. If you are NOT ready to complete part II of the I-9, click **Continue Questions Later**.



After completing the details on part II of the I-9, the I-9 will be displayed for your approval. Click **Approve** at the bottom of the page.



If you are screening your employees for WOTC (Work Opportunity Tax Credit) eligibility AND the employee has entered **Yes** to one of the WOTC questions, their WOTC forms will immediately display for your approval after approving the I-9. Scroll down to review the forms, then click **Approve** to fully approve the WOTC forms that will be submitted to the state.



You are done!

Working on Other Open Manager Tasks

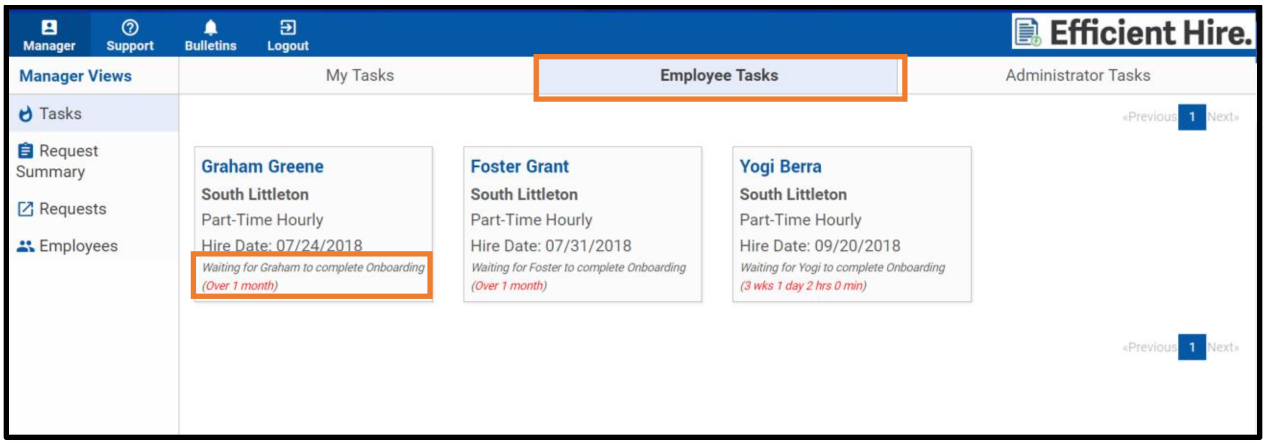
Below is a list of other possible buttons you may see when approving employee's requests:

Complete Employee Profile	You will see the ***Complete Employee Profile*** button if the employee's onboarding forms are ready for approval, but you have not yet completed the Employee Profile. Click on the button to complete the Employee Profile information. When you finish, you will automatically be taken into the Onboarding approval process.
Complete I-9 Part II	You will see the ***Complete I-9 Part II*** button if you approved the employee's onboarding forms, then clicked **Continue Questions Later** when prompted to answer part II of the I-9. Click on the button and enter the employee's identification documents and submit to E-Verify if applicable. When the I-9 is displayed for your approval, click **Approve** at the bottom of the page.
Approve I-9	You will see the ***Approve I-9*** button if you completed Part II of the I-9, but then hit the **Cancel** button instead of the **Approve** button when the I-9 was displayed. Click on the button, scroll down to review the I-9, then click **Approve**.
Approve WOTC	You will see the ***Approve WOTC*** button if you approve the I-9, but then hit the **Cancel** button instead of the **Approve** button when the WOTC forms were displayed. Click on the button, scroll down to review the forms, then click **Approve**.
Approve Employment Application	You will see the ***Approve Employment Application*** button if you are using the EHX Application module and an employee has e-signed their application. The application now requires your approval. Click on the button, scroll down to review the forms, then click **Approve**.
Upload Attachment	You will see the ***Upload Attachment*** button if there is a *required* Attachment that needs to be uploaded prior to approving the forms.

Viewing Pending Employee and Administrator Tasks

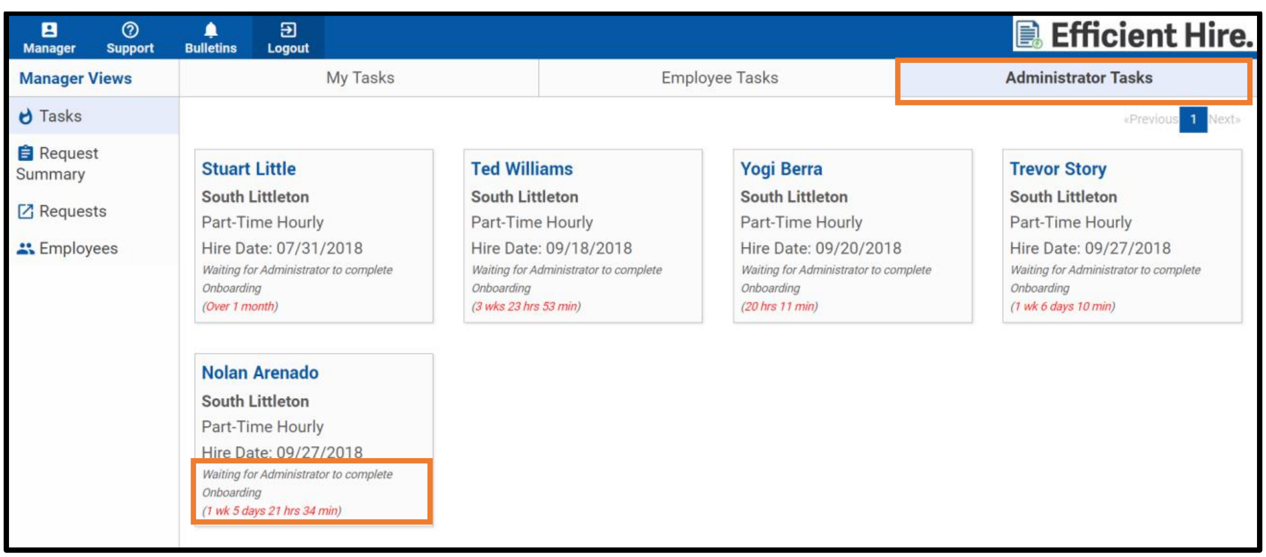
Employee Tasks

To view tasks that are pending action on the *employee's* part, click on the ***Employee Tasks*** tab. In the screenshot below, note that you are waiting on all three employees to complete their onboarding forms. In this case, you also see how much time has expired since they were sent their registration link.



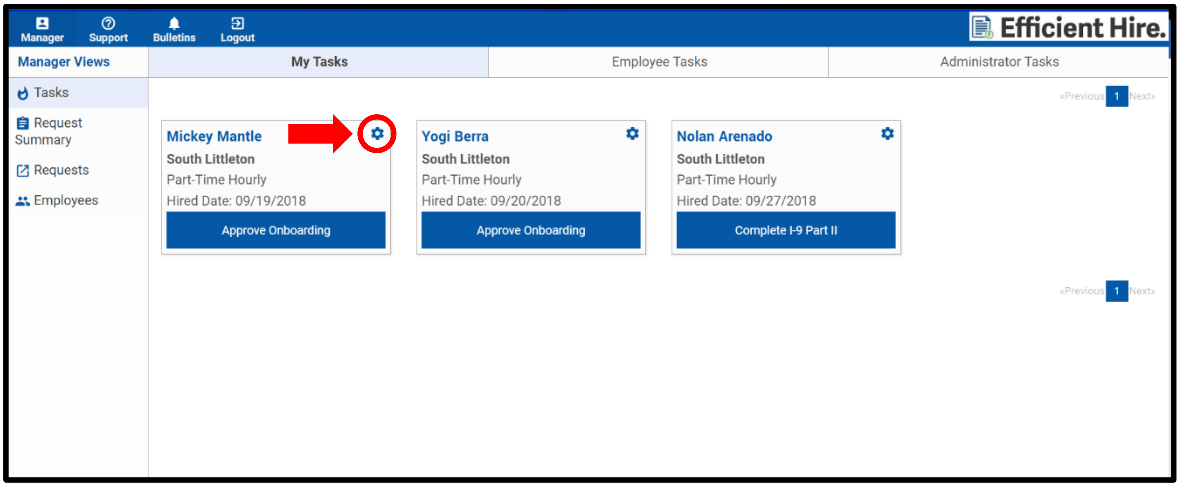
Administrator Tasks

To view tasks that are pending action on the *administrator's* part, click on the ***Administrator Tasks*** tab. In the screenshot below, note that you are waiting on the administrator to approve onboarding for all these employees. You can also see how long it has been since the administrator received the onboarding forms to approve.



Inactivating an Employee or Request

Notice there is an action gear on the top right of every task card.



If you click the action gear, you will have the option to inactivate the employee completely or inactivate their next request. ***The purpose of these options is to be able to easily inactivate employees who are hired but never start working with your company***. For example, in the screenshot below, Asher Gibbs was interviewed and accepted an offer to start with the company, but he never actually showed up to work. In this case, you would click the action gear then **Inactivate** to hide his account and remove the task completely.