UC San Diego

ONBOARDING Solution Quick Reference

Push Back Forms for Edits

Let us suppose that you are Onboarding Daisy Flower, and when she returns her completed new hire forms you notice what you believe is a mistake in entering her birth date. You must send back her forms and ask that she check that specific entry to ensure accuracy or make a change.

Log on to the ONBOARDING Environment. Navigate to the Actions Tab. Choose "View Existing Onboardings" from the menu of selections.

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other | All

Onboarding Name ↑	Hiring Supervisor Name	Department HR Rep Name	Working Title	Title Code/Payroll Title	Created Date	Process Stage
.O, Tosh	Kelly Aranaz	Kelly Aranaz		0747 - ACCOUNTANT PRN	3/30/2016	Completed
AAAAAAAA, Test	afdf fadsf	Kelly Aranaz		0034 - SR VC RESTRICTED USE	6/13/2016	Record Created
Aaroon, Daeny	Jack Lance	Kelly Aranaz	Bus Analyst	0655 - BUS SYS ANL MGR 2	6/20/2016	Completed
Adams, Albert	Michael Yates	Michael Yates	Recruiter	7640 - EMPLOYMENT OFCR SR	2/25/2016	Offer Declined
Anderson, Abigail	Kelly Aranaz	Henry Deas	Manager	0010 - PROVOST EXEC VP ACAD AFFAIRS	6/13/2016	Campus Forms Sent
Appleseed, Johnny	Kelly Aranaz	Henry Deas		0100 - MGT PRG UNTTL	6/10/2016	Campus Forms Sent
Aranaz, Julie	Pearl Trinidad	Kelly Aranaz	Mr. Entertainment	6312 - PUBL EVENTS MGR SR	6/14/2016	Campus Forms Sent

Using the alphabet search bar at the top, find the candidate record you need.

Onboarding Name ↑	Hiring Supervisor Name	Department HR Rep Name	Working Title
fads, fdsf	fdasf fadsf	Martin Test	fadsf
Fell, Felli	Pearl Trinidad	Kelly Aranaz	Project Manager
Flower, Daisy	Pearl Trinidad	Barbara Angeletti	
Franz, Hanz	Kelly Aranaz	Kelly Aranaz	
Friday, Redo	K K	Kelly Aranaz	
Friday, T	K K	Kelly Aranaz	
Friday, Test	K K	Kelly Aranaz	
Frisco, Don	Pearl Trinidad	Barbara Angeletti	Technician

Onboarding
Flower, Daisy

Approve/Push Back for Editing of Onboarding

Employee Name	Flower, Daisy
Department Name	BUSINESS AND FINANCIAL SERV. (000001)
Appointment Type	Career
Payroll Title	0517 - SYS ADMST MGR 1
First Day of Service	12/5/2016

🔴 Loading iDocs Document Viewer for Salesforce...

[Approve] [Push Back for Editing] [Onboarding Details]

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Click the Push Back for Editing button.

Onboarding
# Flower, Daisy

Approve/Reject Onboarding   [Complete Push Back] [Record Details]

Employee Name	Flower, Daisy
Department Name	BUSINESS AND FINANCIAL SERV. (000001)
Appointment Type	Career
Payroll Title	0540 - BUS SYS ANL SUPV 2
First Day of Service	8/12/2016
Instructions to New Hire	

[Complete Push Back] [Record Details]

You will notice a text box that is a required field. This box is provided for you to send a message to the new hire. Enter the reason(s) you are returning the forms, and specifically which edits need to be made. When your message is complete, click Complete Push Back.

You will see this warning:
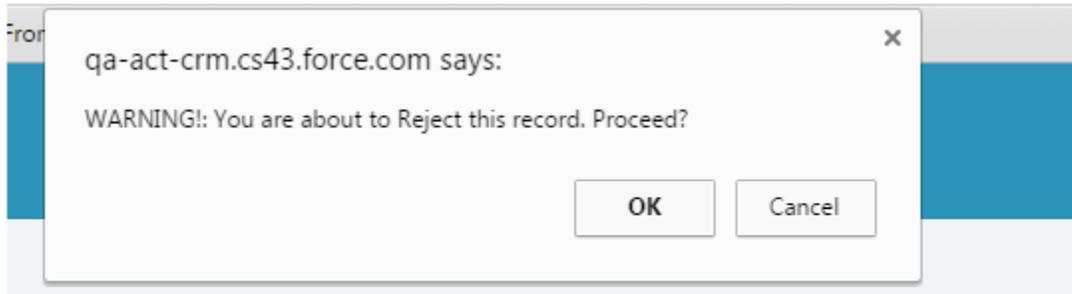
Click OK to send back the forms.

Department Initiator receives an e-mail that forms were pushed back.

The New Hire receives an e-mail notifying them that their new hire forms need to be completed. When the e-mail is opened, the message from the HR Initiator that includes the reason for returning the forms, appears in the body of the e-mail message.
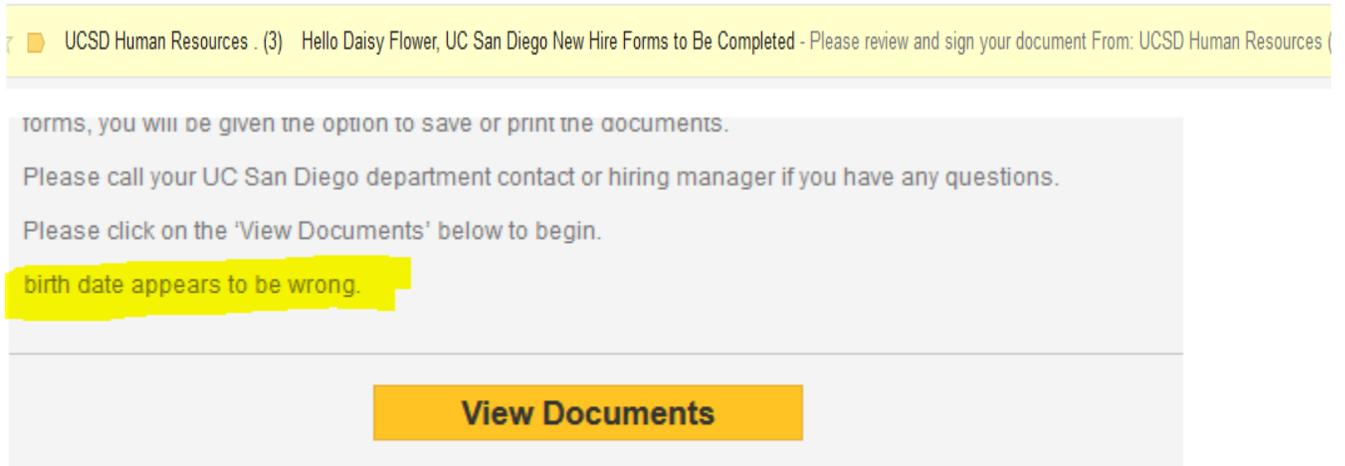
By clicking View Documents, the new hire can make the necessary changes to their forms and clicks Finish to send back the forms.

Please Note: While the data entered into the forms will hold through the push back, the new hire will be required to re-initial and re-sign all of the forms. This is a technological constraint that is baked into the software. Any change to content requires new initials and signatures.

Daisy Flower makes corrections to her forms and sends them back.