



Human Resources Office

Rundell Hall, Room 201

Phone: 281.425.6875 • Fax: 281.425.6568

Email: hr@lee.edu • Website: www.lee.edu/hr

NEOED/NEOGOV Onboarding Module User Guide

Table of Contents

Introduction.....	3
Getting Started: Log In to NEOED	3
Employee Perspective.....	3
Accessing Onboarding Information & Tasks Through the Unified Self-Service (USS) Dashboard (Main Home Page)	3
Dashboard Link.....	4
Tasks Link	6
Accessing Onboarding Information & Tasks Through the Onboarding Module Dashboard	7
Onboarding Module Dashboard	7
Manager Perspective.....	12
Accessing Onboarding Information & Tasks Through the Unified Self-Service (USS) Dashboard (Main Home Page)	12
USS Dashboard Links	12
Accessing Onboarding Information & Tasks Through the Onboarding Module Dashboard	17
Onboarding Module Dashboard	17
Questions/Assistance	18

Introduction

The Onboarding module serves as a centralized hub that accelerates hiring by streamlining new hire paperwork and processes and seamlessly communicating tasks and progress with various users/departments. The module also shares important information about the College and resources needed to help new hires be successful.

Managers play a key role in the onboarding process. They receive notifications informing them when an employee begins and completes the hiring process and when they have a task to complete related to the hire. The system allows managers to monitor an employee's progress toward completing the onboarding tasks and much more.

If you need assistance with features or have questions, please contact the Human Resources Office at hr@lee.edu or (281) 425-6875.

Getting Started: Log In to NEOED

To access the Onboarding features in NEOED, you must first log into the system.

I. Current Employee with Network Access

Employees who have been assigned network access through IT (i.e., have a Lee College username and password for logging into devices) will log in using the College's [Single Sign On \(SSO\) website](https://leecollege.onelogin.com/launch/1566527) (<https://leecollege.onelogin.com/launch/1566527>). When logging in to the SSO site, use the username and password IT created for you. If you need assistance logging into SSO, contact the Help Desk at helpdesk@lee.edu or (281) 425-6952.

II. New Employee Waiting to Receive Network Access

Employees who have not received their network credentials from IT yet will temporarily log into NEOED using the [non-SSO website](https://login.neoed.com/) (<https://login.neoed.com/>) to complete their onboarding tasks. You will receive an email from NEOED with instructions on how to log in and create your own password. Your personal email address is typically your username. Once your network access is created by IT, you will begin accessing NEOED through the College's SSO website mentioned above. If new employees have trouble logging in to the non-SSO site, contact the Human Resources Team for assistance at hr@lee.edu or (281) 425-6875.

Employee Perspective

There are two places employees can access onboarding-related items in NEOED, the Unified Self-Service (USS) Dashboard (main home page) and by navigating to the Onboarding module's dashboard. All tasks can be accessed and viewed from the USS Dashboard. If authorized, you may be able to view additional information such as details about your employment (e.g., ID #, contact information, job description, department, hire date, direct report information – if applicable, etc.), view and download your completed forms, and add notes in the Onboarding Dashboard. The information provided below outlines how you can access both dashboards.

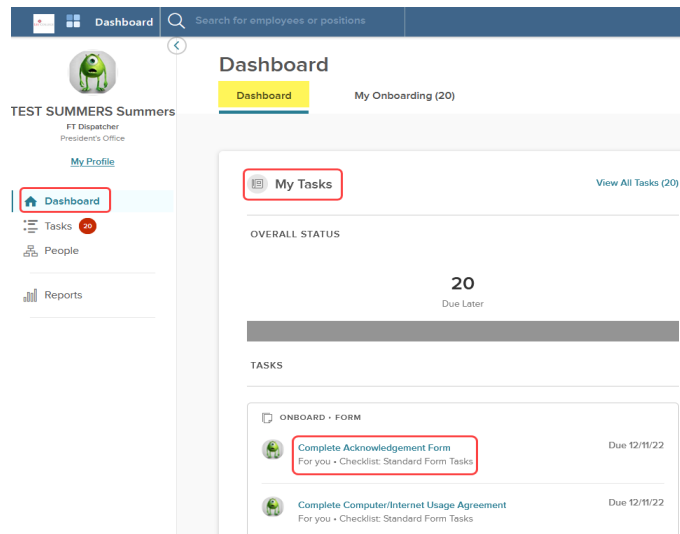
Accessing Onboarding Information & Tasks Through the Unified Self-Service (USS) Dashboard (Main Home Page)

The Unified Self-Service (USS) Dashboard is the home page employees and managers see when they first log into NEOED. As an employee (e.g., new hire or rehire), you can access the onboarding portal and checklist of tasks using the Dashboard or Tasks links.

Dashboard Link

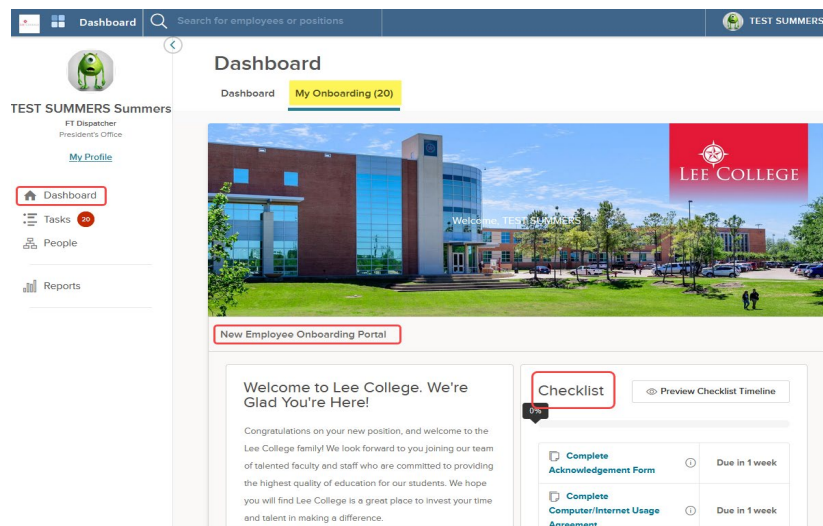
Dashboard Tab > My Tasks

Any action required/task assigned to you will be listed in the My Tasks section located on the Dashboard tab. Click the appropriate link to open and complete each task.



My Onboarding Tab

Click the My Onboarding tab to view the agency-wide portal (i.e., New Employee Onboarding Portal) and applicable sub-portals that may be assigned to you based on your position or department.



Portal(s)

Portals consist of various widgets (e.g., sections) that share information about the College. The Checklist and Chat widgets are important to point out.

I. Checklist

Any tasks assigned to you will populate in the Checklist section.

- Click each task and follow the instructions to complete the assigned items. Different types of tasks/actions may be assigned to employees:
 - Download a Document – You must download the document in order to mark the task as complete.
 - Link – You must click and open a link before you will be allowed to mark the task as complete. The link opens a new webpage allowing you to view the information.

- Video – You must watch the entire video before you can mark the task as complete.
- Acknowledgement Form – You must fill out the form per the instructions that are provided. Some fields may be grayed out if you do not have access to complete them.
- Attachments – You must upload a specific document to complete the task.
- The green bar at the top of the section shows the percentage of tasks completed.
- Click View All to see the full list of tasks.

New Employee Onboarding Portal

Welcome to Lee College. We're Glad You're Here!

Congratulations on your new position, and welcome to the Lee College family! We look forward to you joining our team of talented faculty and staff who are committed to providing the highest quality of education for our students. We hope you will find Lee College is a great place to invest your time and talent in making a difference.

The intent of this site is to give you quick and easy access to your new hire tasks, as well as information and resources to help you be successful and productive in your new role.

Contact the Human Resources Team if you have any questions or need assistance - Email: hr@lee.edu or Phone: (281) 425-6875.

Get to Know Us

We encourage you to learn more about the College and our community.

- Check out our [Mission, Vision, Values & Goals](#).
- Learn about our [Diversity, Equity & Inclusion](#) Initiatives.
- Read about the [College's history](#) or review [quick facts](#).
- Become familiar with [our Leadership team](#) & [our organizational structure](#).
- Browse the [News Room](#) to learn about current events.
- Connect with us online - [Facebook](#), [Twitter](#), [Instagram](#) & [YouTube](#).
- Take a virtual tour of [campus](#) or [get directions](#) to our locations.

Checklist

Preview Checklist Timeline

100%

Complete Acknowledgement Form	Completed
Complete Computer/Internet Usage Agreement	Completed
Complete Confidentiality Agreement	Completed
Complete Nepotism Disclosure Form	Completed
Complete Public Access Option Form	Completed
Complete Release for Employment Verification	Completed
Complete Salary Increase Notification	Completed
Complete Transcript Request Acknowledgment	Completed
Complete Travel Policy Acknowledgement	Completed
Complete Direct Deposit Authorization Form	Completed

VIEW ALL (45)

- Select Preview Checklist Timeline to view a chronological summary of actions taken pertaining to the checklist (i.e., due date, hire date, tasks, assignee, status).

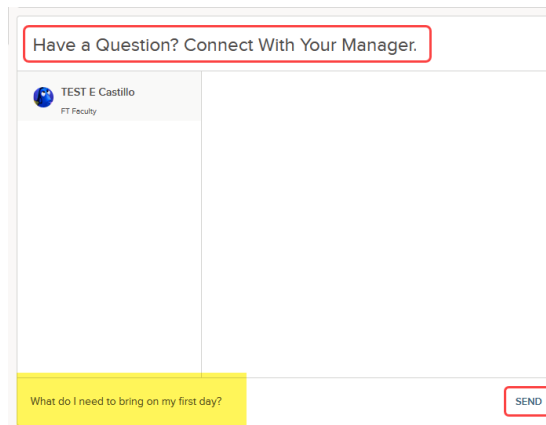
Preview Checklist Timeline

Done

DUE DATE	TASK	ASSIGNEE	STATUS
11/26/2022	Complete Release for Employment Verification	TEST J Rosser	Completed
	Request key for employee	Amanda Summers	Completed
	Sign Key Request	HR Admin	Completed
	Acknowledge key receipt	TEST J Rosser	Completed
12/01/2022 HIRE DATE			
12/01/2022 POSITION START DATE	Run Background Check	HR Admin	Completed
	Identify Existing ID # / Create New ID #	HR Admin	Completed
	Process VOEs	HR Admin	Completed
	Enter hire in PS	HR Admin	Completed
	Enter hire in TX OAG	HR Admin	Completed

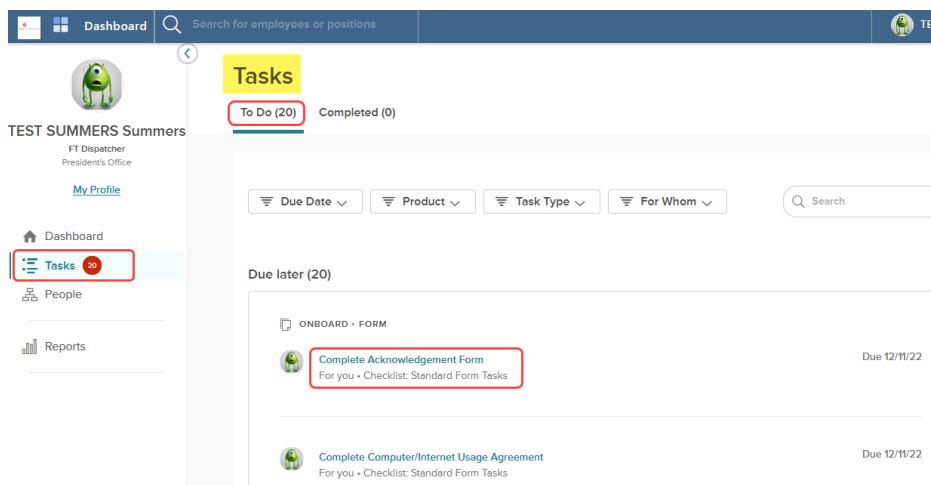
II. Chat

This feature offers a quick and convenient way to connect with your supervisor. Type your message in the bottom section and hit SEND. You may receive an email making you aware that a new message was sent to you via chat.

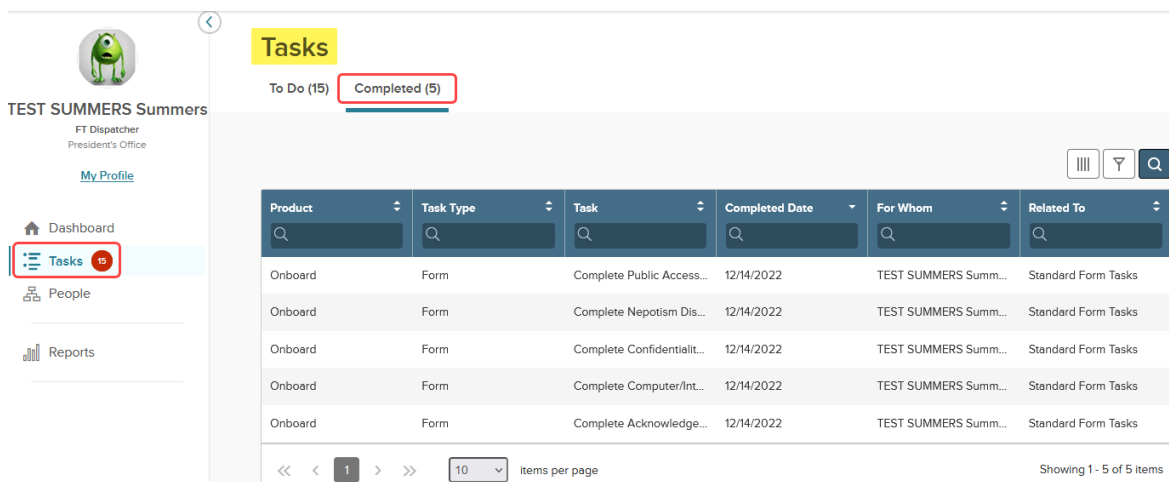


Tasks Link

You can view open and completed tasks from the Tasks link. Actions you need to take are displayed under the To Do tab. Click the appropriate link to open a task.

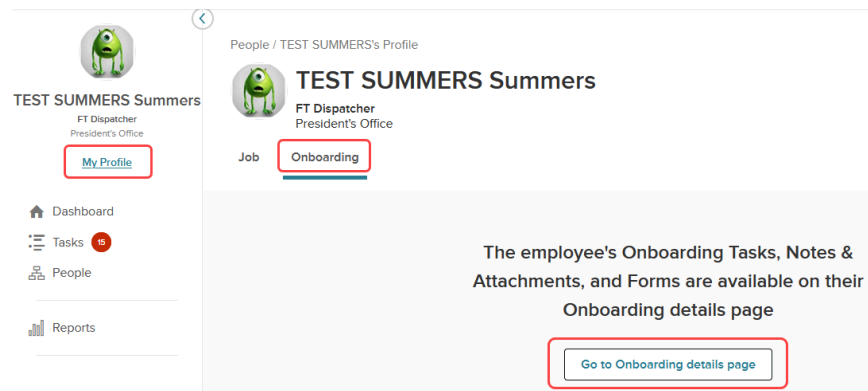


Completed tasks may be viewed by selecting the Completed tab.



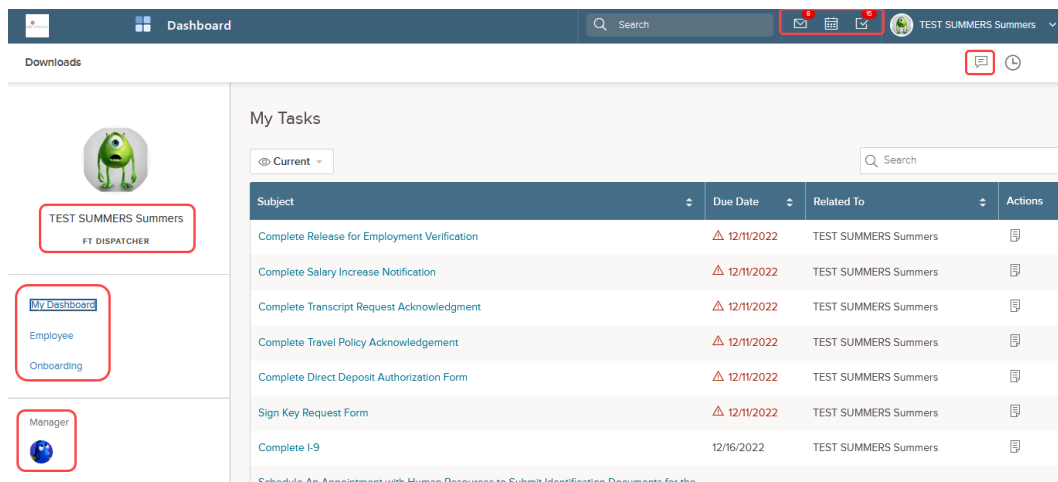
Accessing Onboarding Information & Tasks Through the Onboarding Module Dashboard

Follow these steps to navigate to the Onboarding Dashboard/module from the USS Dashboard: Click My Profile > Onboarding tab > Go to Onboarding details page.



Onboarding Module Dashboard

The following information will display in the navigation fields on the left: Your picture, name and position, links (i.e., My Dashboard, Employee and Onboarding), the name of your manager and the name(s) of your direct reports if applicable. On the navigation fields in the upper right corner of the page, you will see links to access your messages, calendar, tasks and chat.

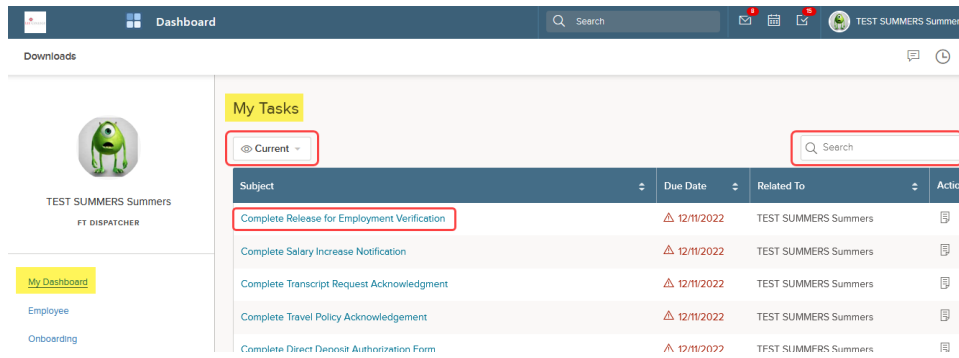


Links – My Dashboard, Employee & Onboarding

I. My Dashboard

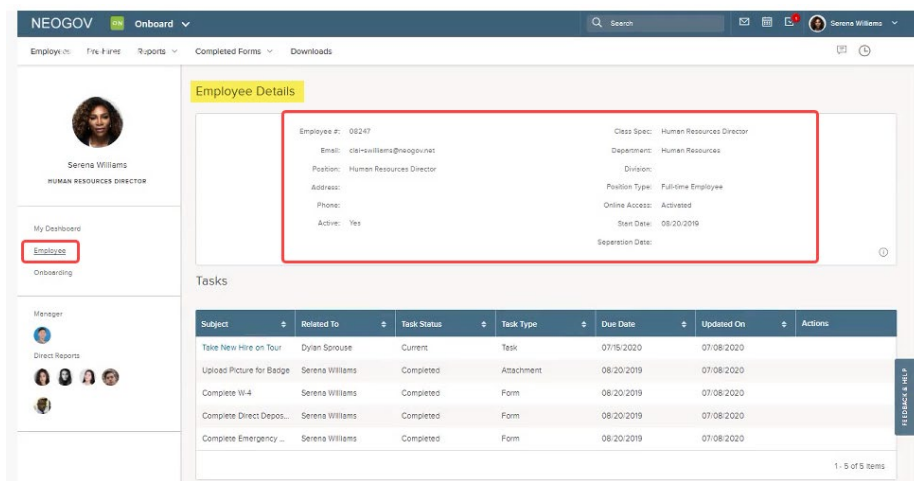
View tasks assigned to you in the My Tasks section.

- Complete Task – Click a task link to open and complete the required action.
- Sort Tasks – To sort tasks based on their status (i.e., Current, Completed, Canceled, Pending or Skipped), click the view box and select the appropriate option.
- Search Tasks – Use the search field on the right to look up items related to tasks.

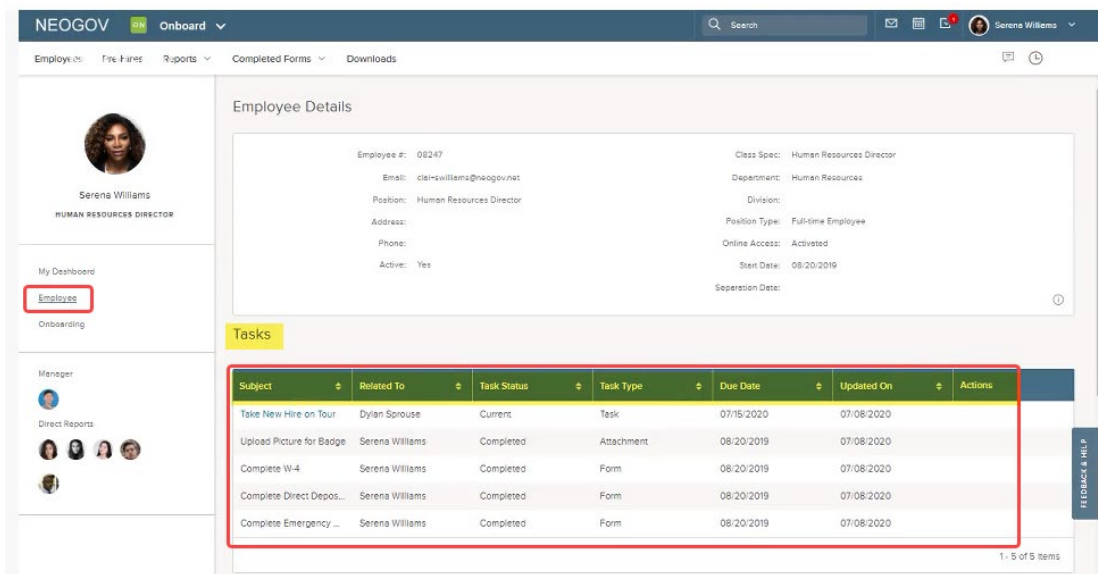


II. Employee

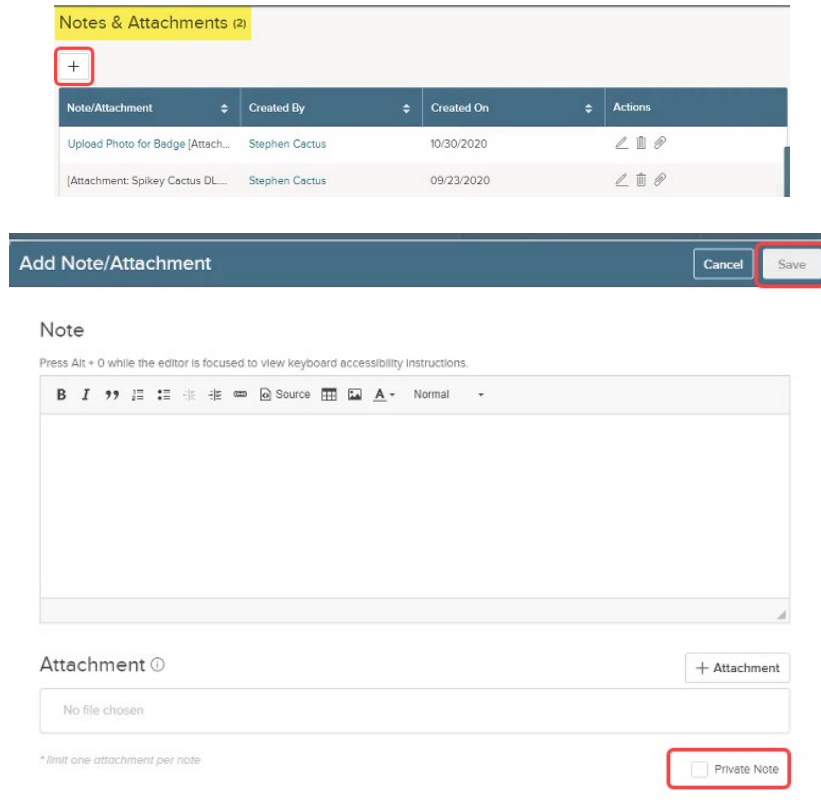
- Employee Details – View employee information such as position, department, start date, etc.



- Tasks – This section is a high-level overview of all tasks assigned. Columns show the task, status, type and due date.

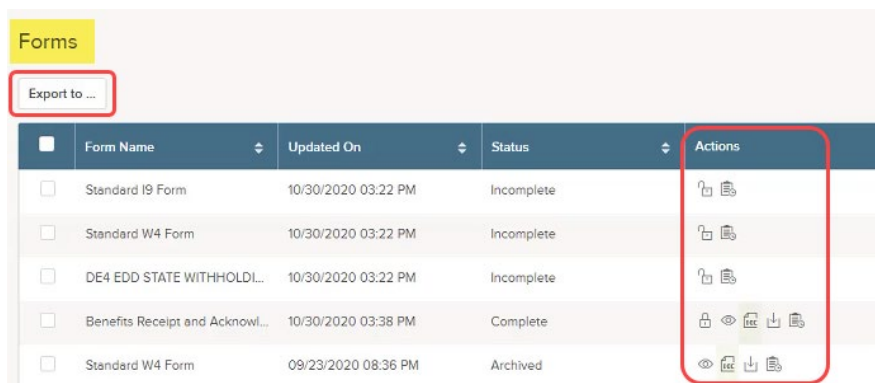


- Notes and Attachments Forms – Add notes or attachments to your profile.
 - Check private if you do not want to share the information.
 - Documents added in attachment tasks are also stored here.



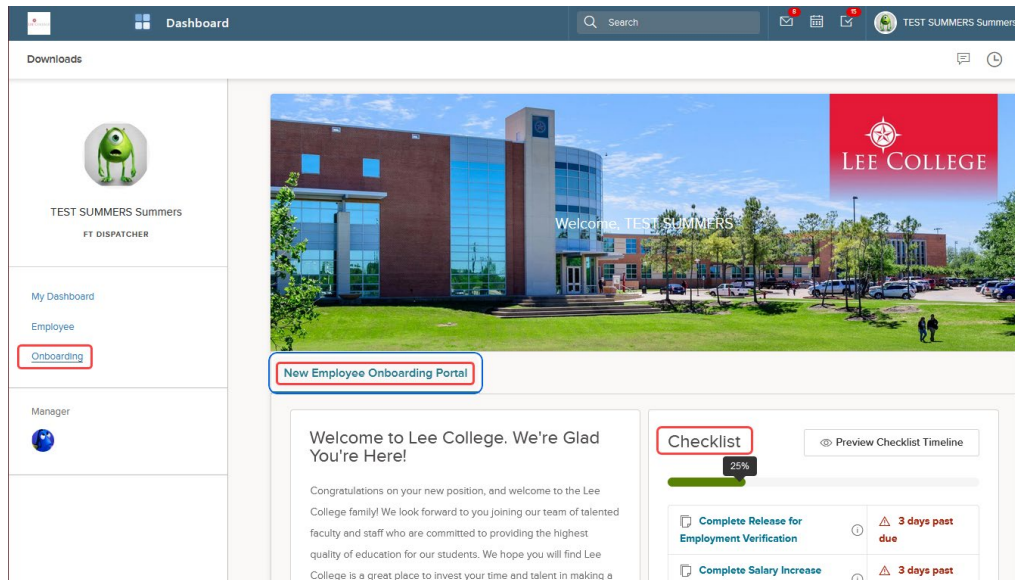
- Forms – View and download forms you have completed, as well as attachments that were required as part of an onboarding task. Under the Actions column, you can perform the following activities:
 - Export Forms – In the first column, check the applicable form(s) > click Export To > Export to PDF.
 - View Forms – Select the eye icon to view the form as a pdf.
 - Open an Attachment – Click the form document icon to view an item attached to a particular form (e.g., voided check for direct deposit form). Click the name of the document to view it. In the actions column, select the download or trash icons to take the associated actions.
 - Download Forms – Click the download icon.
 - Audit History – Select to view the history of actions taken related to this document.

NOTE: Completed forms are locked and cannot be edited without permission from Human Resources.



III. Onboarding

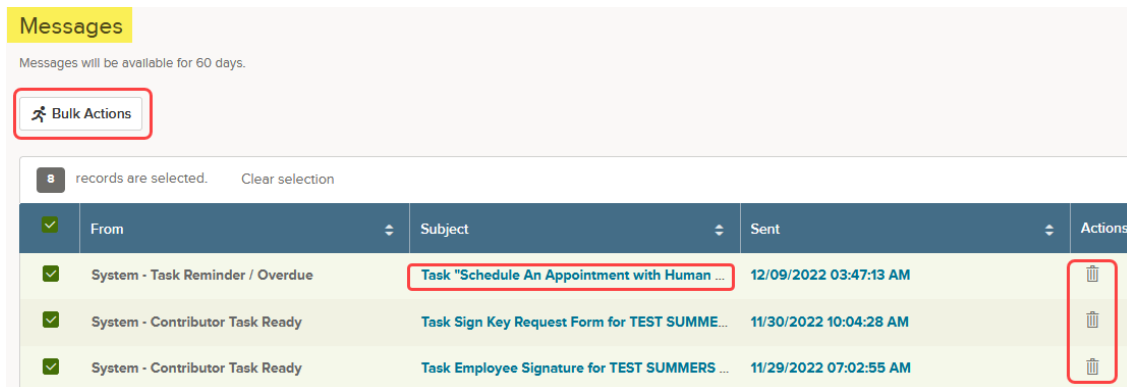
Like the USS Dashboard, the Onboarding tab displays applicable portals (i.e., agency-wide New Employee Onboarding Boarding and assigned sub-portals) mentioned above. (See My Onboarding Tab section above for more information about portals, checklists and the chat feature.)



Messages



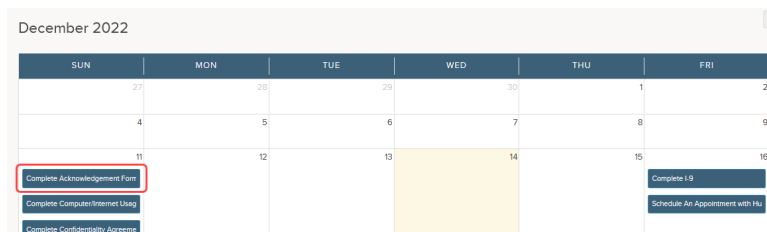
Clicking this icon allows you to view all messages that have been sent to you. Select the blue link to open and read a message. Click the trash icon in the action column to delete an individual message. To delete messages in bulk, check the messages you want to remove, click Bulk Actions > Bulk Delete > Ok.



Calendar

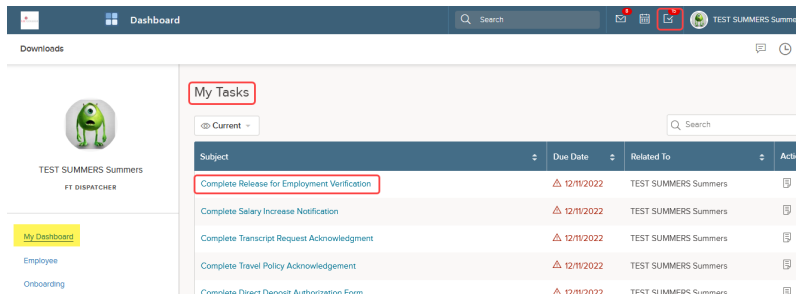


The calendar icon displays the tasks on their due dates. Employees can click an individual task to view information about it.



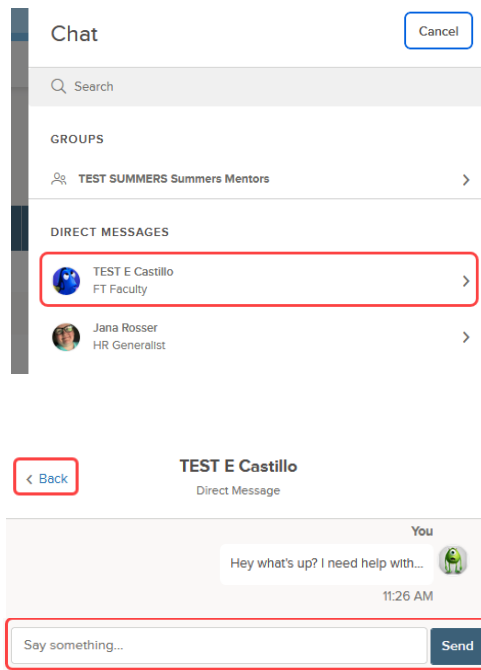
Tasks

Selecting the task icon opens the My Tasks section on the My Dashboard link. Click a link to open and complete a task.

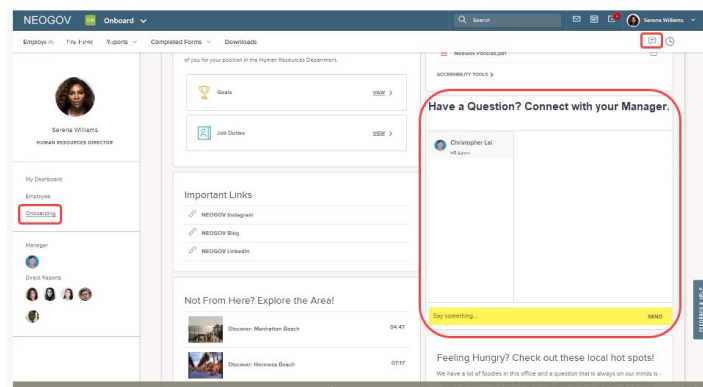


Chat

Clicking the chat icon allows you to initiate instant messages with your manager, direct report or applicable subgroups. Select the person you are trying to communicate with via chat. A direct message box will open. Type your message and hit send. If the person you are trying to communicate with is not currently in NEOED, he/she will receive an email letting them know you want to chat. To exit the chat box, click Back > Cancel.



The instant messages are also visible/accessible in the Chat section in the New Employee Onboarding Portal.



Manager Perspective

**** IMPORTANT: You will find general information about employee access to onboarding-related features in NEOED in the Employee Perspective section above. This section highlights additional elements available to managers. ****

As noted in the Employee Perspective section, there are two places employees/managers can access onboarding-related items in NEOED, the Unified Self-Service (USS) Dashboard (main home page) and by navigating to the Onboarding module's dashboard. All tasks can be accessed and viewed from the USS Dashboard. If authorized, employees and managers may be able to view additional information in the Onboarding Dashboard. The information provided below outlines onboarding features for managers.

Accessing Onboarding Information & Tasks Through the Unified Self-Service (USS) Dashboard (Main Home Page)

The Unified Self-Service (USS) Dashboard is the home page employees and managers see when they first log into NEOED. If authorized, managers may see more navigation link options on the left (i.e., Dashboard, Tasks, People, Recruiting, Reports) than employees who are not in supervisor roles. Links will be limited to the access/permission assigned to each position.

USS Dashboard Links

Dashboard Link

I. Dashboard Tab

From the Dashboard link, under the Dashboard tab, managers may see the following shortcuts:

- HR Announcements
- My Tasks – Any action required/task assigned to you will be listed here. Click the appropriate action link to open and complete each task. Selecting View All Tasks will take you to the To Do tab on the Tasks link.
- People – A list of your direct reports will display in this section. Clicking an employee name opens the employee detail page under the People link. Selecting the View Team link takes you to the My Team tab under the People link.
- Quick Actions – If you have permission to request to fill a position, you will see a link to Create a Requisition. This link serves as a shortcut allowing you to quickly open and begin filling out the electronic requisition form.

The screenshot displays the NEOED USS Dashboard for Amanda Summers, Executive Director of Human Resources. The interface includes a left-hand navigation menu with links for Dashboard, Tasks, People, Recruiting, Reports, and Settings. The main content area features a 'Dashboard' tab, a 'My Onboarding' section, and several task cards. A red box highlights the 'Dashboard' link in the navigation menu. Another red box highlights the 'View All Tasks (12)' link in the 'My Tasks' card. A third red box highlights the 'View Team' link in the 'People' card. A fourth red box highlights the 'Create a Requisition' link in the 'Quick Actions' section. The dashboard also displays an HR announcement, a 'Review W-4 Form' task, and an 'ONBOARD - GENERAL' task with a 'Run Background Check' button.

II. My Onboarding Tab

The My Onboarding tab displays the agency-wide portal (i.e., New Employee Onboarding Portal) and applicable sub-portals that may be assigned to you based on your position or department. This allows you to see the same information that was shared with new hires. However, unlike new employees, you will NOT see items in the checklist section of the portal. As the manager, any tasks you are assigned will appear in the My Tasks areas on the Dashboard and Tasks links. Tasks assigned to managers will NOT appear in the checklist section of the New Employee Onboarding Portal for managers.

The screenshot shows the 'My Onboarding' tab selected in the top navigation bar. The left sidebar contains a user profile for Amanda Summers, Executive Director of Human Resources, with a 'My Profile' link. Below the profile are navigation links for Dashboard, Tasks (with a red notification badge), People, Recruiting, Reports, and Settings. The main content area features a large banner image of Lee College with the text 'Welcome, Amanda!' and the Lee College logo. Below the banner is a yellow box labeled 'New Employee Onboarding Portal'. A 'Welcome to Lee College. We're Glad You're Here!' message is displayed, along with a 'Checklist' section showing a 0% progress bar and a 'Preview Checklist Timeline' link.

Tasks Link

Similar to employees, managers can view open and completed tasks from the Tasks link. Actions you need to take are displayed under the To Do tab. Click the appropriate link to open a task. To see a list of completed tasks, select the Completed tab.

The screenshot shows the 'Tasks' link selected in the top navigation bar. The left sidebar is identical to the previous screenshot, but the 'Tasks' link is highlighted with a red box and a red notification badge. The main content area shows the 'Tasks' section with two tabs: 'To Do (12)' (selected) and 'Completed (220)'. A progress bar indicates 1 Overdue task and 11 Due Later tasks. Below the progress bar are filter buttons for 'Due Date', 'Product', 'Task Type', and 'For Whom'. The 'Overdue (1)' section displays a task titled 'ONBOARD - REVIEW' with a sub-task 'Review W-4 Form' for Annie Wilkes (TEST), which is highlighted with a red box. The task is associated with the checklist 'Student Employees'.

Tasks
To Do (12) **Completed (220)**






Product	Task Type	Task	Completed Date	For Whom	Related To
Onboard	General	Enter IT Work Order - D...	12/14/2022	Wednesday Addams (T...	Offboarding Checklist - ...
Onboard	General	Enter IT Work Order - D...	12/13/2022	Annalise Keating (TEST)	Offboarding Checklist - ...
Recruiting	Approval	Offer: Karen Ascencio f...	12/13/2022	Amanda Summers	Requisition
Recruitment	Approval	Requisition: Executive D	12/13/2022	Amanda Summers	Requisition

People Link

As a manager, you may have access to the People link. This allows you to see information about your direct reports.

I. My Team Tab

A list of your direct reports shows on this tab.

- Select an Employee – Click an employee name to open the employee’s profile.
- Adjust View – Adjust the way your team is displayed by selecting the grid  or card  view option. (Grid view is shown in the screenshot below.)
- Search  – Use the search icon to look up employees.
- Filter  – Use the filter icon to open advanced filtering for the list.
- Adjust Columns  – Use this icon to add additional items columns to the list.

People
My Team My Team's Tasks Org Chart Employee List

My Team

Photo	First Name	Last Name	Division	Position	Start Date	Email	Actions
	Cintha	Barrios	President's Office	Coordinator, Ben...	05/09/2022	cbarrios@lee.edu	...
	Ebelinda	Castillo	President's Office	HR Generalist	05/10/2021	ebcastillo@lee.edu	...

II. My Team’s Tasks Tab

This tab allows you to view any tasks within the NEOED system (e.g., Onboarding, Recruiting – Approvals, Reviews, Recommendations) currently assigned to your direct reports. As the manager, you cannot take any action from this page. It simply provides a snapshot of current and late tasks assigned to your team members.

III. Org Chart Tab

This tab displays an org chart for your area.

- Search – Use the search field to look up employees or positions.
- Export – Click Export to create a pdf of the chart. When exporting the chart, you will be given the option to export the current view or customize the export.
- Adjust Chart Size – Select + or – to reset the size of the chart on your screen.
- View Employee Information – If applicable, an employee box may include a message stating the # of direct reports associated with this team member (see example below). To view an employee’s profile, click the employee’s picture.

People

My Team My Team's Tasks **Org Chart** Employee List

Search by Employee or Position

Export

Reset

Org Chart

Amanda Summers
Executive Director, Human Resources
8 Direct Reports

- Cynthia Barrios
Coordinator, Benefits and Le...
1 Direct Report
- Ebelinda Castillo
HR Generalist
- Marissa Moreno
Executive Director, Schools...
1 Direct Report
- Abbey Mourer
Coordinator, Talent Acquisit...
1 Direct Report
- Jane Rosser
HR Generalist
- TEST J Rosser
FT Dispatcher
- Lena Yopez
Director, Career & Transfer S...
5 Direct Reports
- Open Position
Director, Human Resources

IV. Employee List Tab

This tab provides another way to view a list of your direct reports. You can use the search, filter and column icons on the right to quickly access employee information. Clicking on an employee name opens the employee profile page.

People

My Team My Team's Tasks Org Chart **Employee List**

Employee List

First Name	Middle Name	Last Name	Employee ID	Division	Position	Direct Manager
Cynthia		Barrios	0123253	President's Office	Coordinator, Benefits and Leave	Amanda Summers
TEST C		Barrios	9999999	Provost/Academic & Student A...	Student Assistant	Lena Yopez

Recruiting Link

The recruiting link is visible to managers assigned access to the Online Hiring Center (OHC). Not all employees have access to the OHC module. Managers use this link to view tasks and information associated with requesting and approving positions, monitoring job postings, viewing applicants and recent hires, recommending candidates for hire, etc. For more information on the OHC module, please refer to [HR's NEOED OHC User Guide](#).

Reports Link

As a manager, you may have limited access to certain onboarding reports (i.e., Onboard Progress, Offboard Progress, Checklist Progress, Task Status, Form Reports and Exit Interviews) associated with your team members.

Reports

Amanda Summers
Executive Director, Human Resources
President's Office
My Profile

Dashboard Tasks **People** Recruiting **Reports** Settings

Onboard

- Onboard Progress
- Offboard Progress
- Checklist Progress
- Task Status
- Form Reports
- Exit Interviews

I. Onboard, Offboard and Checklist Progress

- **Onboard Progress Report** – See how your direct reports are progressing through the assigned new hire checklist(s)/tasks.
- **Offboard Progress Report** – See how your direct reports are progressing through the assigned exiting checklist(s)/tasks.
- **Checklist Progress Report** – View the checklist completion % for your direct reports.

The data provided on these three progress reports is similar. Each report lists the names of your team members and displays the progress he/she has made toward completing the assigned onboarding, offboarding or checklist tasks.

Employee #	Employee Name	Position	Division Code	Division Name	Checklist Completion
0050907	Abbey Mourer	Coordinator, Talent Acquisition	President	President's Office	100%
0214016	Anthony Perez	Director, Dual Credit	Provost	Provost/Academic & Student Affairs	11%

- **Search and Filter Results** – Use these icons on the right to quickly locate employees and/or information.
- **Add Columns** – Click the columns icon to add or remove columns from the data viewed on the screen.
- **Generate Report** – Click this button to create a report that includes the data for each individual currently displayed on the screen. It may take a few minutes to create the report. To view the completed report, click the Download link at the top of the page. This opens the Download List page. The Status column will let you know when your report is completed. Afterwards, click the download icon in the Actions column to access your report. **** IMPORTANT: Downloaded reports are only available for 7 days. **** If you do not access the information within this timeframe, you will need to rerun the report.

File Name	Initiated On	Status	Progress	Error	Actions
BulkPrintForms_12-13-2022_07-10-0...	12/13/2022 07:10 AM	Completed	100%		

- **Bulk Actions** – To extract data for multiple employees, select the applicable employees > click Bulk Actions > choose the appropriate action (i.e., Export to CSV, Export to PDF or Export to Excel).

II. Task Status

Similarly, the Task Status report displays all tasks assigned to your direct reports. Various search options are available (e.g., select the checklist you want to view tasks for, do you want to view active or inactive checklists, etc.). The status of each task is displayed in the Status column. Clicking an employee name opens the Employee link on the Onboarding module. This page displays Employee Details, Tasks, Notes & Attachments and Forms. Clicking a task link opens the Task Information page. As described above, managers can also use the search, filter and column icons, Bulk Actions and Generate Report buttons for this report.

Employee #	Related To	Division Code	Division Name	Checklist Name	Task Name	Type	Assignee	Status
0050907	Abbey Mourer	President	President's Office	Standard Form Tasks	Run Background Che...	Task	HR Admin	Completed
0050907	Abbey Mourer	President	President's Office	Standard Form Tasks	Identify Existing ID # ...	Task	HR Admin	Completed

III. Form Reports

Managers may have permission to view certain forms associated to their direct reports.

IV. Exit Interviews

Managers may have permission to view exit questionnaires completed by their direct reports.

Accessing Onboarding Information & Tasks Through the Onboarding Module Dashboard

Follow these steps to navigate to the Onboarding Dashboard/module from the USS Dashboard: Click My Profile > Onboarding tab > Go to Onboarding details page.

People / Amanda's Profile

Amanda Summers
Executive Director, Human Resources
President's Office

Job: **Onboarding**

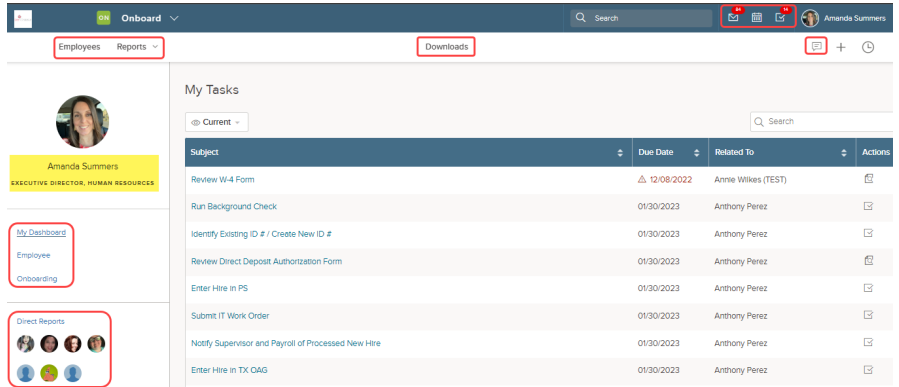
The employee's Onboarding Tasks, Notes & Attachments, and Forms are available on their Onboarding details page

[Go to Onboarding details page](#)

Onboarding Module Dashboard

As described in the Employee Perspective, the following information will display in the navigation fields on the left: Your picture, name and position, links (i.e., My Dashboard, Employee and Onboarding), the name of your manager and the name(s) of your direct reports. On the navigation fields in the upper right corner of the page, you will see links to access your messages, calendar, tasks and chat.

Information about these items was previously covered in the Employee Perspective, Links – My Dashboard, Employee & Onboarding section. Please review this information to become familiar with their functions.



I. Links – My Dashboard, Employee & Onboarding

A description of these links/features is provided above in Manager Perspective, USS Dashboard Links sections provided above.

II. Direct Reports

Clicking on a direct report will open the employee’s Onboarding Dashboard, allowing the manager to view the employee’s Employee and Onboarding links.

III. Links – Employees, Reports & Downloads

Managers may also have access to the following links at the top of the Onboarding site: Employees, Reports and Downloads. Functions for each of these links were described in Manager Perspective, USS Dashboard Links sections provided above.

Questions/Assistance

If you have questions or need assistance, contact the Human Resources Office at hr@lee.edu or (281) 425-6875.