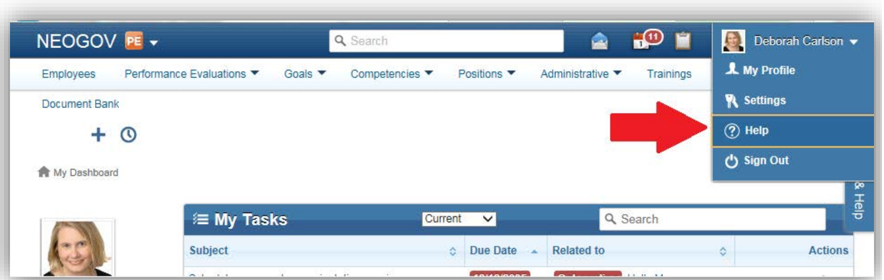
NEOGOV: Onboarding for Managers

Logging on

1. Access NeoGov online at login.neogov.com
   1. Click on **Sign in** to begin
   2. Login with username and password emailed to you from NeoGov
   3. Be sure the ON button is selected in the dropdown menu in the upper left-hand corner (OHC is for Recruitments only)

Questions?

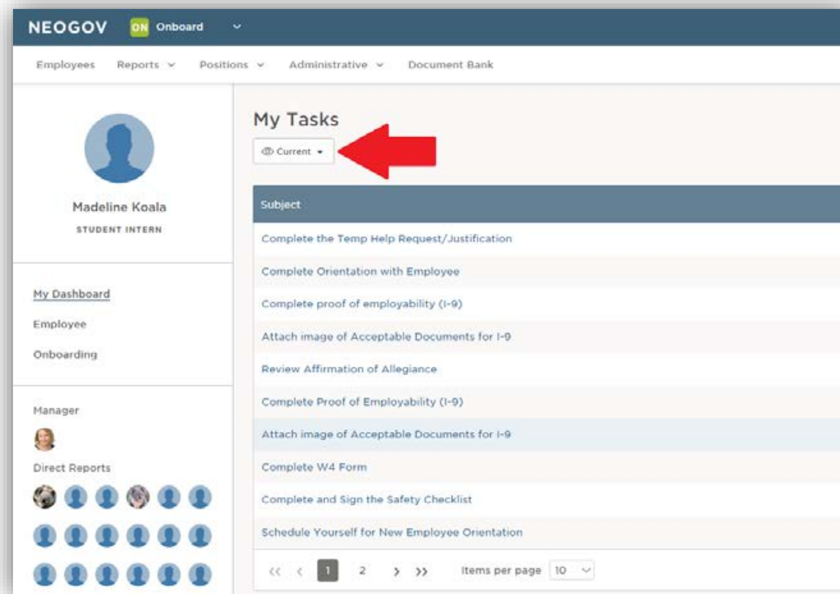
1. Access videos and step by step instructions from the NEOGOV Help menu.



2. For further questions, e-mail **hr_neogov@co.slo.ca.us**

Navigating *My Dashboard*

1. Click **My Dashboard** on the left hand menu.
2. Under My Tasks, you can view all your tasks.
3. Click the drop down button that says Current to navigate between your task types.



4. The Current button will display tasks that are currently available for completion.
5. Click any of your current tasks in order to complete them.
6. The Pending button will display tasks that will soon be assigned to you.

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Navigating *Employee*

1. Click **Employee** on the left hand menu.
2. Under Tasks, you can view all your tasks.
3. (This includes current, completed, pending etc.)
4. You can click a task to complete it.
5. Click the pencil icon to edit a specific task.

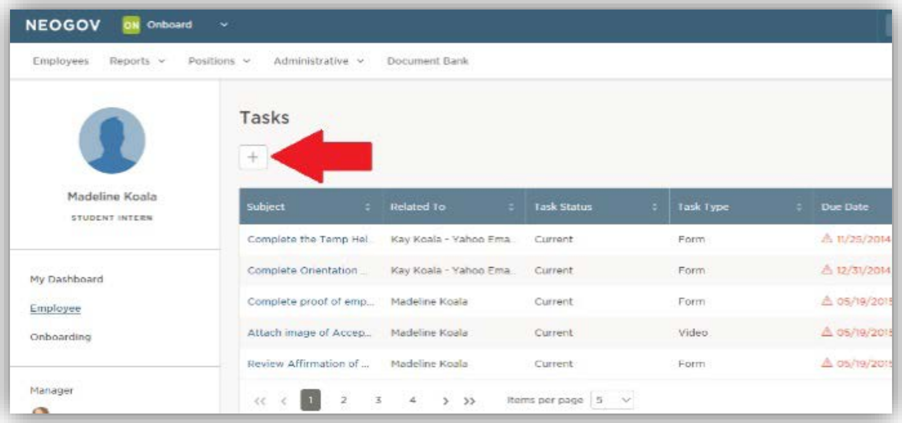
Changing the Person Assigned a Task

Note: You can only reassign a task to an employee who reports to you. You cannot perform this function with a task associated with a form.

1. Click the pencil to the right of the desired task.
2. Update Task Subject and Comment as needed.
3. In the Update status box, select Current.
4. Update the Assignee as needed.
5. Update Due Date and Priority boxes as needed.
6. Click on the Reminders tab if they need changing.
7. Click **Save**

Add a Task, Form, Note or Attachment

1. Click the plus sign underneath the Task, Forms, or Notes & Attachments category.



1. Fill in required info, and edit any necessary details.
2. Click **Save** (**Assign** for Forms)

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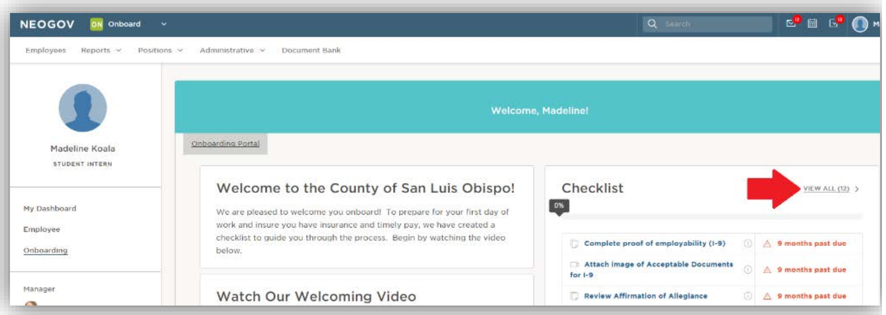
Navigating *Onboarding*

1. Click **Onboarding** on the left hand menu.
2. Under Checklist you can view your most recent tasks
3. You may click on the tasks to complete them.



4. Click View All to see all of your checklists and tasks.
5. You can also click on tasks to complete them here.

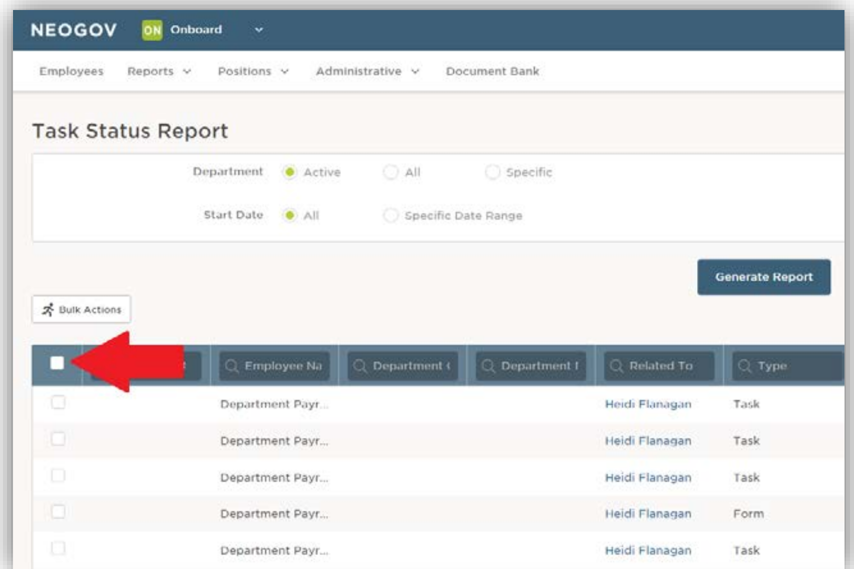
Assign a Task

Note: You can only assign a task to an employee who reports to you.

1. Click on an employee from the Employee List.
2. Underneath Tasks, click on the plus sign.
3. Fill in the subject, due date,
   and other necessary info.
4. Uncheck the box that says 'Also notify on save'.
5. Click **Save**.

Create and Export a Status Report

1. Click **Reports** in the menu bar on the upper left side of the screen. Select Task Status (or Checklist status).
2. Click **Generate Report**.
3. To export, click the check box underneath the Bulk Actions button to select the entire report. (You may use the search fields to narrow the report results).



4. Click **Bulk Actions**.
5. Select how you would like to export the report.
6. The file will download onto your computer.