# **CORPS** Onboarding Task Management
## Instructions

**Overview:** The Civilian Onboarding Requirements Processing System (CORPS) will allow you to manage the onboarding process for incoming personnel by tracking the completion of necessary tasks and (when appropriate) assign related responsibilities to other members of your team. Utilizing the system consists of three basic steps (items in bold represent terminology you will see in the system):

**1. Create an onboarding tasker for a New Hire**: To begin the process, you must create a record for your incoming employee. To do so, click on the blue "**Enter New Hire**" button on the left side of the main system screen.

A new form will appear. At the top of the form, you will be prompted to enter the New Hire's **Name,** their first day (Entrance on Duty or **EOD Date**), and to select the **Organization** (from a drop down of Marine Corps Commands) which the New Hire will be assigned. All of this information is required.

Underneath the New Hire's information will be a comprehensive list of actions required throughout her/his first year. Default selections have been made for you but, in most cases, you will be able to assign the task to the New Hire's **Supervisor**, **Sponsor**, or an **Administrative Assistant** (this can be anyone in your organization who assists with administrative issues) as you deem appropriate. If you would like to remove an item from the checklist, indicate "**N/A**." At the bottom of the form, you are given the chance to create up to five additional actions and place them in the appropriate phase by using the **Optional Tasks** section.

When you have completed the form, click **Save**. When the record is created (this will take a few moments, please be patient), you will automatically be assigned as the contact person for all tasks. At this point, you still need to determine a Sponsor or Admin to complete the tasks assigned to those roles.

2. **Assign Support Roles**: After the New Hire has been entered into the system, you can assign a Sponsor and Admin to assist with the onboarding process. To do so, find the New Hire's name in the "**Assign Contacts**" list. Click in the checkbox to the left of the person's name and then click on the "**Actions**" tab at the top of the section, then "**Assign Supervisor, Sponsor and/or Admin**". A form will open in which you can enter or change the Supervisor, Sponsor and/or Administrative Assistant's name from the Global Access List. The system will automatically assign the tasks you marked on the entry screen to the people that you indicate here and notify them of their new assignments via email.

Once you have assigned others to one or more of the task roles, the New Hire's name will no longer appear on the "**Assign Contacts**" list. To change or add an assignment, select "**All Task Assignments**" from the Views options. This will display all the New Hires (past and present) that you are permitted to view.

3. **Address Required Actions**: As you (or your assignees) begin task items, click on the checkbox to the left of the task, select "**Actions**" and "**Start Task**". When you have completed the assigned task, you can mark it complete by clicking in the checkbox to the left of the task, selecting "**Actions**" and "**Complete Task**". The completed task will be marked complete and removed from the list (you will need to refresh your page). You will easily see which tasks are remaining in each phase of the onboarding process.