NEOGOV



33

Illuminating Questions to Ask When Searching for a Solution to

VIRTUAL ONBOARDING

The challenges of remote work have caused public sector agencies to reevaluate how new employees are acclimated to the campus community, particularly with regard to onboarding. Tasks and administrative work that used to take place in person and onsite over the first few days and weeks of employment now need to happen more quickly, and be accessible from anywhere. But how do you choose the best solution for your organization's needs?

Here are 33 key questions to ask when evaluating onboarding software for an educational institution:

VIRTUAL ONBOARDING QUESTIONS:

1. Is the platform web or cloud-based and mobile friendly?
2. Are you able to tailor the onboarding portal experience for different stages of recruitment (e.g., pre-hire, employment offer stage, and first day)?
3. Can you create different portal experiences for different types of hires (e.g., full-time, part-time, seasonal)?
4. Are you able to create sub-portals to use as informational hubs for roles or departments?
5. Can department liaisons have access to maintain their own departmental portals and checklists?
6. Can you customize the portals with pictures, videos, external links, and important documents like the employee handbook, building map, organizational chart, etc.?
7. Are there default portal templates that provide a turnkey experience to get up and running quickly?
8. Is HR able to impersonate and/or view as a given user to help them with questions as they complete preboarding, onboarding, and offboarding?
9. How integrated is the virtual onboarding platform with other systems you use?
10. Is there a way to make the onboarding processes more seamless and minimize duplicate entry by the HR team?
11. Can you provide immediate access to the Job Description, the probationary or promotional goals, enroll in benefits, or connect with your LMS to assign required training?
12. Can pre-hires or new hires have access to the virtual onboarding platform before the start date?
13. Can pre-start tasks and checklists be auto-assigned (e.g., tax identification forms, etc.)?
14. Can assignments be made across the entire organization (e.g., IT for network access, Marketing for employee swag, Security for parking pass, etc.)?
15. How long does access to the onboarding portal last? Can the employee reference the materials stored there well after their start date?
16. Does the virtual onboarding portal have the capability for 30, 60, and 90 day checkbacks (probationary check-ins)?
17. Does the platform have an internal chat feature so that the new hire can work with HR, managers, or other users before they are on organization-wide distribution lists or email platforms?
18. Can you create and store all preboarding, onboarding, and offboarding forms within the onboarding platform?
19. Are the forms easy to use and intuitive for the new hire?
20. Can new hires save and return to the forms later?
21. Are you able to route the forms for review, approval, signatures?
22. Are the forms able to be returned if there are mistakes or missing items?
23. Are there any automated reminders or overdue notices to let employees know a form needs their attention?
24. Are I-9 and W-4 forms provided within the platform, maintaining compliance with the most up-to-date versions?
25. Does the onboarding platform integrate with a certified verification system to verify forms?
26. Does the platform have a built-in capability for offboarding (e.g., exit interviews)?
27. Are there pre-built forms or a global form library with access to best practice forms from similar organizations available for your use?
28. Are you able to create and send exit surveys to offboarding employees?
29. Are you able to report results from exit surveys and interviews to change or improve your organization's culture?
30. How long does HR have access to the forms and data?
31. Does the data in the onboarding platform need to be rekeyed from another system or process or printed out for any reason?
32. Can you create and store electronic personnel files in the onboarding platform?
33. Do all stakeholders have visibility into the progress of a new hire's onboarding (e.g., what's complete, what is in progress, what is overdue, etc.)?