

How to run onboarding for a new hire

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Onboarding in HelpOne collects the forms, policies, and training a new staff member needs in one place.

Steps

- Open the staff record.
- Start Onboarding or attach an onboarding checklist if your organization has a template.
- Assign any required policy acknowledgments, e-signature documents, and training.
- Confirm the new hire can access their self-service portal.

Tip: Reuse the same onboarding template for each new hire so nothing is skipped.