## Determining Clear to Work – Detailed Instructions

This document provides step by step instructions to support the Clear to Work Checklist for Hiring Managers.

### Confirm Background Check Completed

New hires to Penn State are required to complete a background check as per [Policy HR99 Background Check Process](https://policy.psu.edu/policies/hr99). Exceptions are those designated a PA Mandated Reporter. PA Mandated Reporters are required to obtain the Publicly Available Clearances in place of a Standard Background Check. If a new hire requires a Standard Background Check, HR Shared Services initiates the check via Workday.

Once the background check is complete, HR Shared Services completes the hire business process and Workday sends the Hiring Manager the Status Update: Hire and Onboard Process email. Receipt of this email and entry of the employee profile in Workday serves as confirmation to the Hiring Manager that the check was processed and returned a pass-eligible result. No additional status or confirmation will be provided – the Standard Background Check status will not appear on the Onboarding Status Summary Report or the employee profile in Workday.

### Confirm All Workday delivered Onboarding Documents or Tasks are Completed

Once the hire is completed in Workday by the HR Shared Services team, the new hire receives a series of email notifications or actions to their **Penn State email.** To check completion status for these items:

**Run PSU\_REP\_CR10430 Onboarding Status Summary Report in Workday**

The report will return results for any new hire to your supervisory organization based on the hire date selected in the filter.

* In Workday, enter report number in the search bar and hit “Enter”.
* Enter “Event Effective Date Minimum” – default setting returns all hires in the last 90 days.
* Enter “Supervisory Organization” desired.
* Select “Include Subordinate Organizations”- to include all supervisory organizations that report to you.
* Select “OK”.

**Review Workday Delivered Onboarding Tasks**

Use the “Onboarding Progress”, “Not Completed”, and “Completed” columns to review status.

* Find the individual’s name in the “Worker” column.
* In the “Onboarding Progress” column review percentage complete. 100% signifies all tasks are finished.
* Using the “Not Completed” and “Completed” columns, review the status of each specific step.

**IMPORTANT!**

* Section 2 of Form I-9 is not tracked in the “Onboarding Progress” calculation.
* Clearance Completion status is not tracked in the “Onboarding Progress” calculation.
* Payment Election Enrollment (direct deposit) is required for payroll purposes. The University does not support paper checks.
* Contact Change and Contact Information tasks are not required to start work. However, failure by the new hire to review and provide a local address, could result in payroll errors.
* The status of all tasks will be reviewed with the new hire during their onboarding session.

Confirm Section 2 of Form I-9 is Completed.

Section 2 of Form I-9 is completed during the onboarding session. The Hiring Manager can verify the I-9 is complete by doing the following:

* Run PSU\_REP\_CR10430 Onboarding Status Summary Report in Workday (see above)
* Find the “I-9 Completion Date” column.
* If the date is entered, Section 2 of Form I-9 is complete.
* If there is no date entered, Section 2 of Form I-9 is not complete.

**IMPORTANT!**

* Section 2 of Form I-9 is not tracked in the “Onboarding Progress” calculation.
* Section 2 of Form I-9 must be completed on or before the employee’s first day of work.
* If no I-9 Completion Date is visible on the report, the new hire has not attended their onboarding session.
* If the new hire has already begun working, they will be paid for work completed, but should not be permitted to continue working until their Form I-9 is complete.

Confirm Clearances are Completed – PA Mandated Reporters

Individuals designated a PA Mandated Reporter, they must present the Publicly Available Clearances for verification during their onboarding session. Hiring Managers can check clearances are complete as follows:

* Run PSU\_REP\_CR10430 Onboarding Status Summary Report in Workday (see above).
* Find the “PA Mandated Reporter” field.
  + If blank, the individual is not a PA Mandated Reporter and would have completed a Standard Background Check (see above).
  + If “yes,” the individual is required to present original clearances during their onboarding session and prior to their first day of work.
* Confirm a date is entered in the “PA Clearance Completion Date” field. This date represents the earliest completion date of the three clearances.
* Confirm the “PA Clearance Results” are listed as “Eligible.” If “Ineligible”, the new hire is not able to begin work.

**IMPORTANT!**

* If the individual is a PA Mandated Reporter and no PA Clearance Completion Date is entered, the individual may not work. If already working, they must stop immediately.
* If the individual is a PA Mandated Reporter and the PA Clearance Completion Date is entered and the result is “ineligible, the individual may not work. If already working, they must stop immediately.
* Instructions to obtain clearances are provided to new hires as part of their Pre-Hire Welcome Email. They can be accessed on the [HR website](https://hr.psu.edu/recruitment-and-compensation/background-checks-and-compliance).
* If the individual has another position at the University and is being hired as an “Add Job,” you will not be able to view them on the Onboarding Status Summary Report. Please run the following Workday report:
  + **PSU\_REP\_CR10555\_Onboarding\_Verification\_For\_Future\_Dated\_Add\_Job\_Transactions**

This report provides Form I-9, Clearance and Provisional Hire information for any “Add Job” positions. These individuals do not require onboarding, but this report will let you verify they have a valid Form I-9 and confirm the status of their clearances if this is a requirement for the position.

## Alternative Ways to Access Information in Workday

In addition to using the reports referenced above, you can access the same information directly on the employee profile in Workday.

### Electronic Onboarding Documents

* In Workday, enter the employee name in the search bar.
* Select “All of Workday” from the search types.
* Hit “Enter.” Do not select the pre-populated employee record.
* From the list of business processes that are returned, select the “Onboarding for” link.
* Select “Process.”
* View the list of assigned onboarding tasks and completion status.

### Form I9 Section 2 and Publicly Available Clearances

* In Workday, enter the employee name in the search bar.
* Select the employee record.
* Select "Actions" under the employee name on the left side of the page.
* Select "Additional Data" from the drop-down menu.
* Select “View All.”
* Under **I-9 Information** verify that “I-9 Completion Date” is entered.
* Under **Background Check** verify:
  + Type = PA Clearances
  + Completion Date is entered
  + Result = Eligible

**IMPORTANT!**

* Standard Background Check information will not be visible.