

## Create Secondary Onboarding Tasks

1. Under "Create Onboarding Tasks" tab, use the drop down options to select a the "Onboarding Task Name".

The screenshot shows the 'Create Onboarding Tasks' interface. At the top, there are navigation tabs: Opportunity, Preview, Team Members, Volunteers, **Create Onboarding Tasks**, Assign Onboarding Task, Time Log, and Ch. Below the tabs, there is a header for 'Onboarding Task (4)' with a sub-header '4 items • Updated 7 minutes ago'. A table lists existing tasks:

|   | Onboarding Task Name                   | Task Title                       | Primary Onboarding Task | Task Directions        |
|---|--|----------------------------------|-------------------------|------------------------|
| 1 | Training                               |                                  |                         | Additional training o  |
| 2 | Driver's License                       | Proof of Driver's License        |                         | Proof of a valid drive |
| 3 | Onboard as Individual Volunteer (301a) | Trail Clean Up Position December |                         | Congratulations, you   |
| 4 | Onboard as a Group Leader (301a)       | Trail Clean Up Group Leader      |                         | Congratulations, you   |

Below the table is a 'View All' link. A red box highlights the 'Create Onboarding Task' form, which includes:

- Create Onboarding Task** header
- Onboarding Task Name dropdown menu (currently showing 'Select')
- Secondary Title text input field
- Audience dropdown menu (currently showing '--None--')

2. Select from the following Onboarding Task options:
  - a. **Additional Forms and Requirements** - can be used for any other forms or requirement not covered by other tasks
  - b. **Background Investigation** - can be used to provide a volunteer with a blank of copy of background investigation forms or directions related to a background investigation required as a part of volunteering
  - c. **Driver's License** - can be used to provide a volunteer with a blank of copy of driver's license verification forms or directions related to the verification of a driver's license required as a part of volunteering
  - d. **Interview, Reference Check, Scheduling** - can be used to include information or directions related to next steps of interviewing, reference checks, or scheduling related to onboarding or consideration as a volunteer
  - e. **Medical Clearance** - can be used to provide a volunteer with a blank of copy of medical clearance forms or directions related to a medical clearance required as a part of volunteering
  - f. **Training** - can be used to provide the volunteer with any directions or documents related to any training required as a part of becoming a volunteer
3. Select the Primary Onboarding Task (301a task) associated to this onboarding task.

