NEOGOV eForms Training Guide: How to Navigate eForms

STEP 1: Log in to the NEOGOV eForms Portal

The NEOGOV eForms Portal may be accessed via Single Sign-On Portal (login.msjc.edu) or https://eforms.neogov.com/. Your username will be your MSJC email address. Please contact Human Resources for a NEOGOV password re-set.
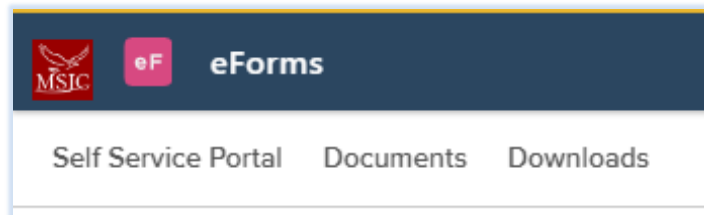

**We recommend utilizing the Google Chrome browser when navigating NEOGOV**

STEP 2: Ensure you are on the NEOGOV eForms Portal

The eForms Portal should be shown at the top left corner of your screen. Select the drop down if another NEOGOV Portal title appears in this section.


STEP 3: Self Service Portal – Employee Profile

Upon entering the eForms environment, the landing page is automatically set to the Self Service Portal screen. The Self Service Portal will show your name, position title, and a link to view 'My Details'.
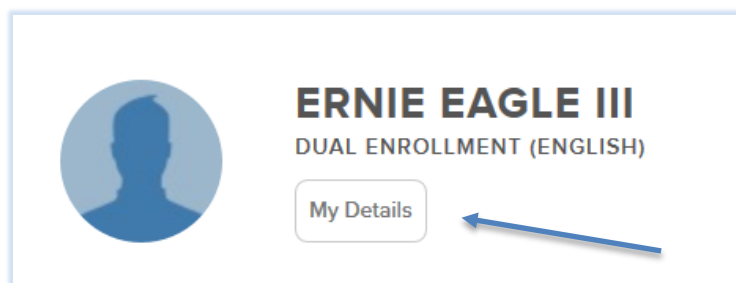
When selecting 'My Details', you will be redirected to your profile. There are 4 tabs available to access a variety of information:
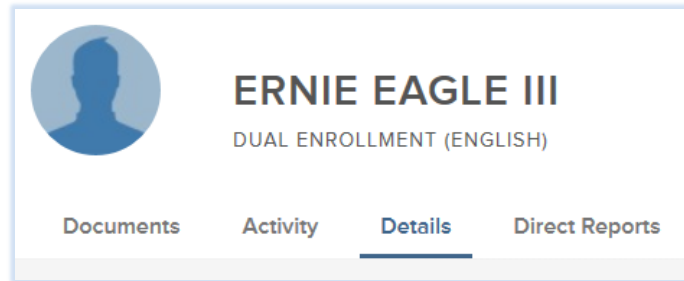
1. **Documents**: This tab houses a series of document folders. Completed eForms are automatically assigned to folder locations and may be accessed within the Documents tab at any time.:
   a. **Tax Forms**
   b. **Benefits**
   c. **Policies**
   d. **Termination** (if applicable)
   e. **Payroll** (for Direct Deposit)
   f. **Other** (for misc. Onboarding forms)
   g. **Standard** (for Employee Information form, Emergency Contact form, Name Change Request form, etc.).

NOTE: Incomplete process tasks will not be available in the Document folder to ensure any discrepancies are corrected prior to form accessibility.

The Document folder is set to card view, but may easily be switched to list view by selecting the list view icon:
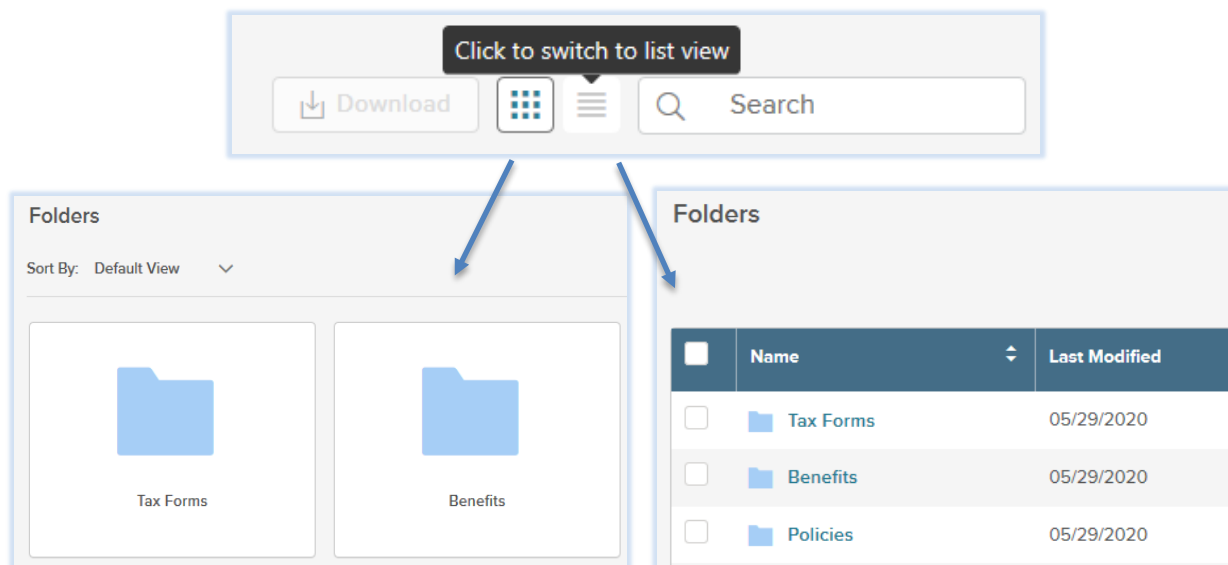

2. **Activity:** contains log of assigned processes
3. **Details:** Contains employee details table (i.e., employee contact information, employee number, position title, department, division, start date, manager, etc.).
4. **Direct Reports:** Contains organizational chart and immediate hierarchy

You may easily revert back to the Self Service Portal by selecting the title in the Navigation bar.
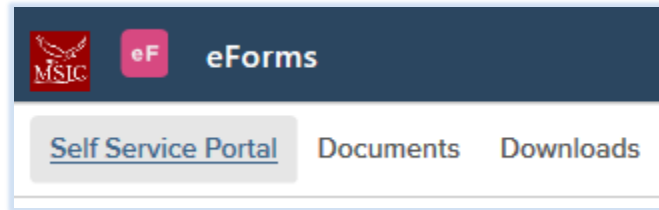

On the Self Service Portal screen, the **Quick Links** sections offers a variety of self-initiated processes that are accessible on an on-going basis. The processes include: Tax Form Updates, Emergency Contact Update, Name Change Request, Employee Information Update, and Direct Deposit Request.
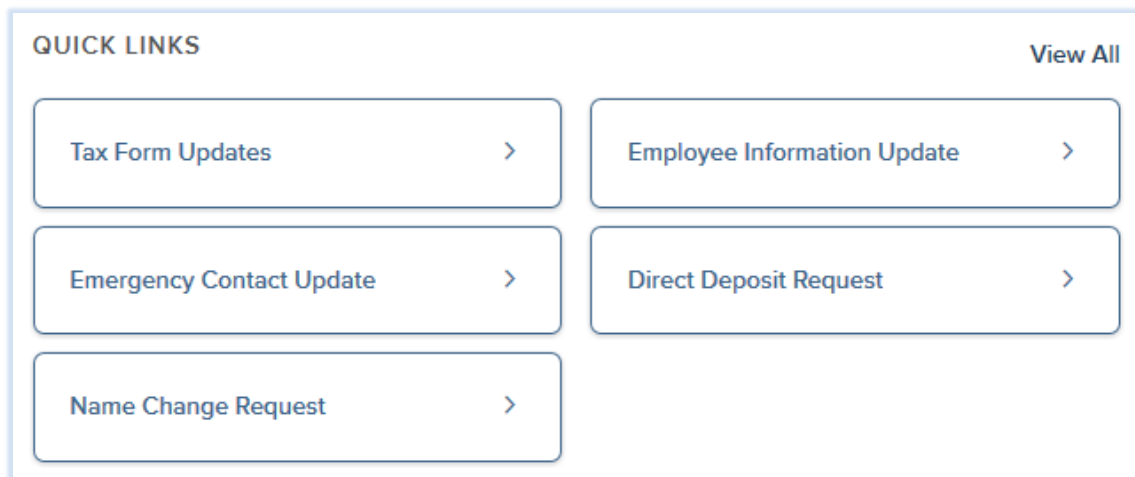

To begin a process, navigate to the Quick Links section. If more than 6 processes are available, you can access them by clicking on the "View All" button. To get a better idea of what each process entails and what you will need to complete the process, select the desired process.
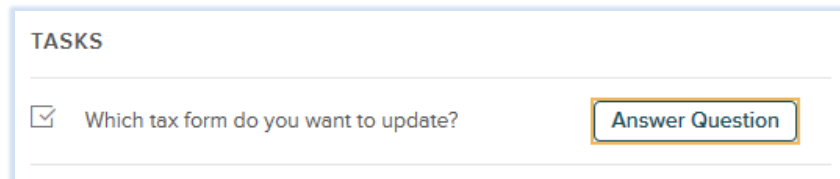
STEP 5: Beginning a Process

Select the desired process from the Quick Links section. For instance, you've selected the Tax Form Updates process. You will see a detailed overview of the process and the required documentation, if any. Select "Start Process" and confirm to begin.
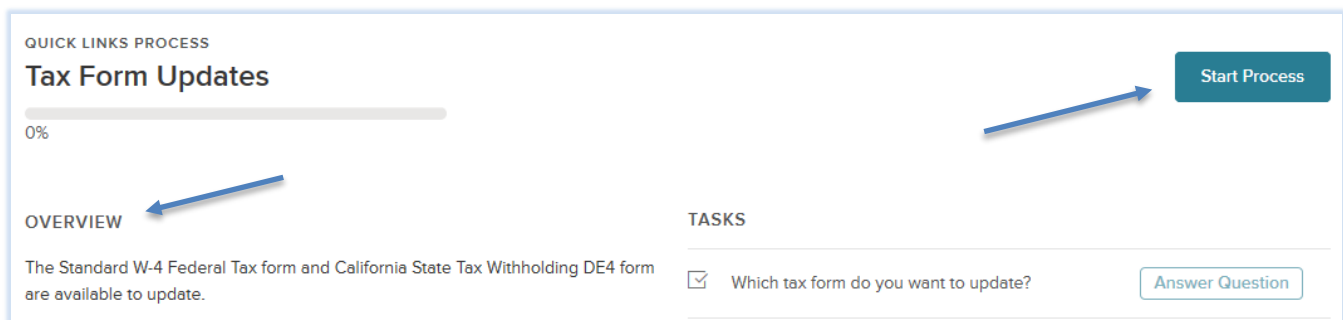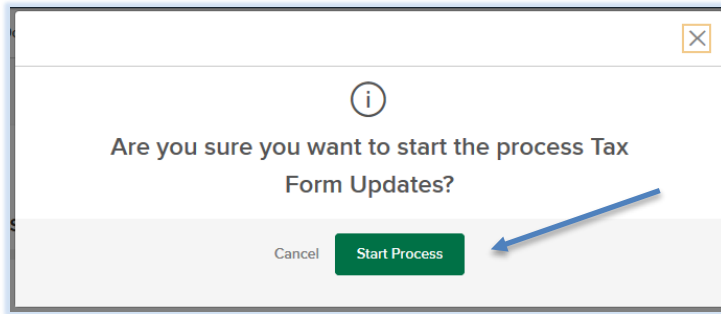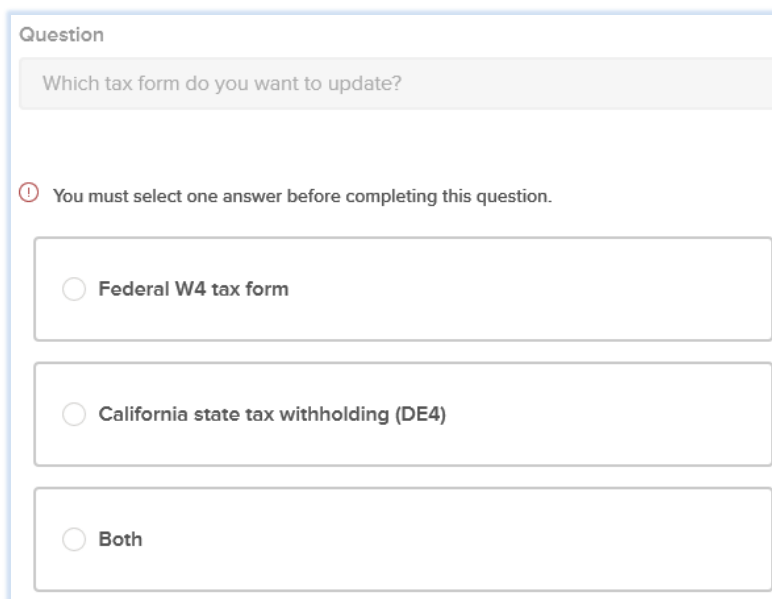
Return to the 'Tasks' section to proceed.

Depending on the process, you may be asked to "Answer Question" to clarify which task you would like to update. If not, you will be directed to click on 'Complete Form'. For the Tax Form Update, this will require you to answer a question:

Once you've selected the desired form and wish to begin, return to the 'Task' section and select "Complete Form.".
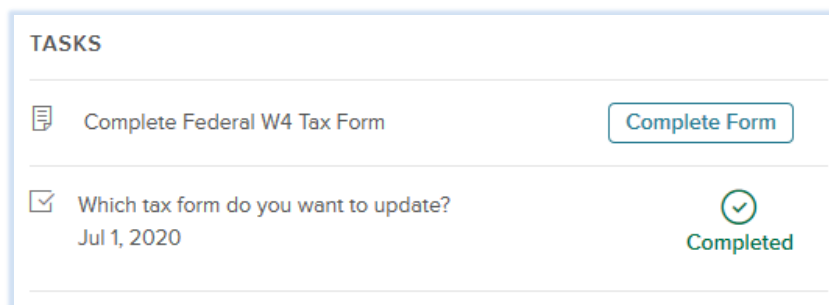
Once the form has been successfully submitted, the task completion bar will show progress but may not reach 100% completion immediately.

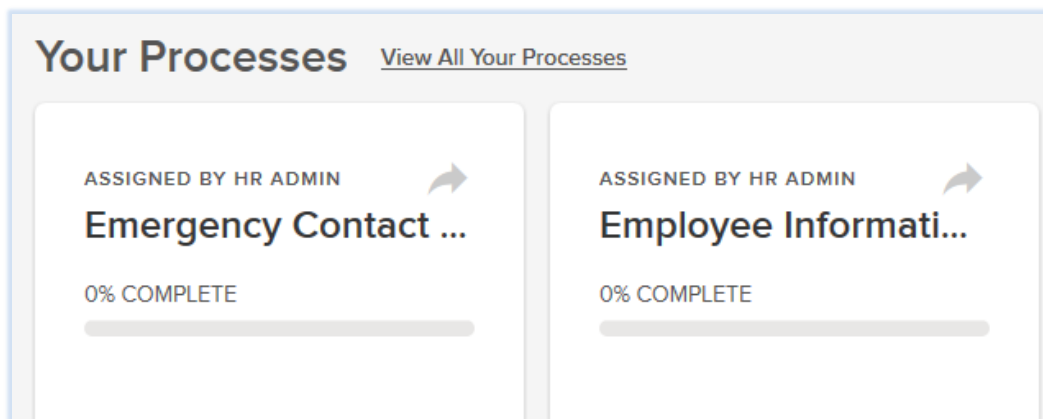QUICK LINKS PROCESS

Tax Form Updates

25%
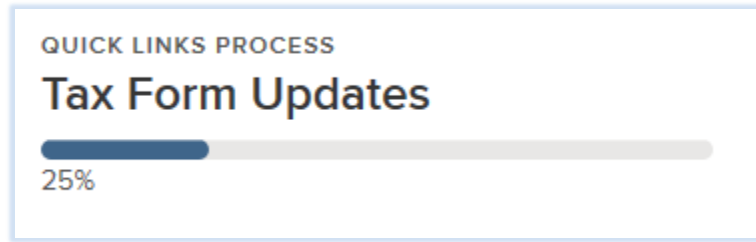
The percentage of completion will reflect 100% once the task has been successfully processed by the applicable department(s), such as Human Resources and/or Payroll. An email notification will be sent to the employee once the update has been completed.

If the task requires correction or modification, the task will be returned back to the employee and an email notification will be released providing details of the necessary action. The process will remain in pending status until the employee has completed/revised the form and resubmitted for review and approval via eForms.

STEP 6: Self Service Portal – Checking on Process Status

Once you start a process, you can always come back to the Self-Service Portal and access the "Your Processes" section to return to a previously initiated (incomplete) process or check on the process completion percentage. You can view all your processes by clicking on the "View All Your Processes" button.

Your Processes View All Your Processes

ASSIGNED BY HR ADMIN

Emergency Contact ...

0% COMPLETE

ASSIGNED BY HR ADMIN

Employee Informati...

0% COMPLETE

To change from a "Your Processes" card view to a list view, select the list view icon at the top right.

Process Completion Percentage ∨
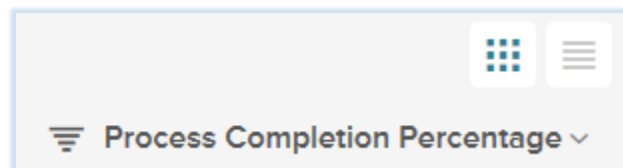
Click on the right arrow of the process card to flip the front side of the card to view the next assigned task. All parties assigned a step in the task approval process (i.e. employee, Human Resources, Payroll, etc.) are required to complete their task within a 7-day period.

A red 'Overdue' notice will appear if the task assignee has elapsed the 7-day window of completion.
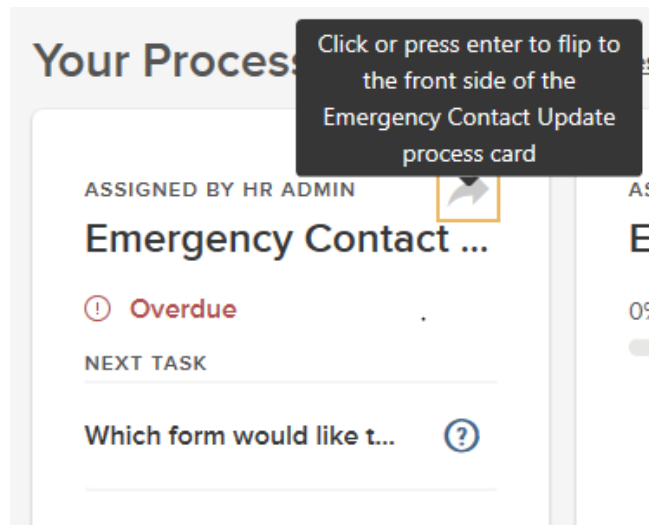

There may be times when your HR person may start a process for you. For example, a form may be required for an employee to complete once a year and should not be accessible on an on-going basis. These processes will appear in the "Your Processes" section of your Self-Service portal for you to complete

The Process Overview section displays statistical information regarding the status of all your personal processes. Selecting each of the status will filter the list below to show the processes in that particular status. The processes are clickable and you are taken to the process overview page.
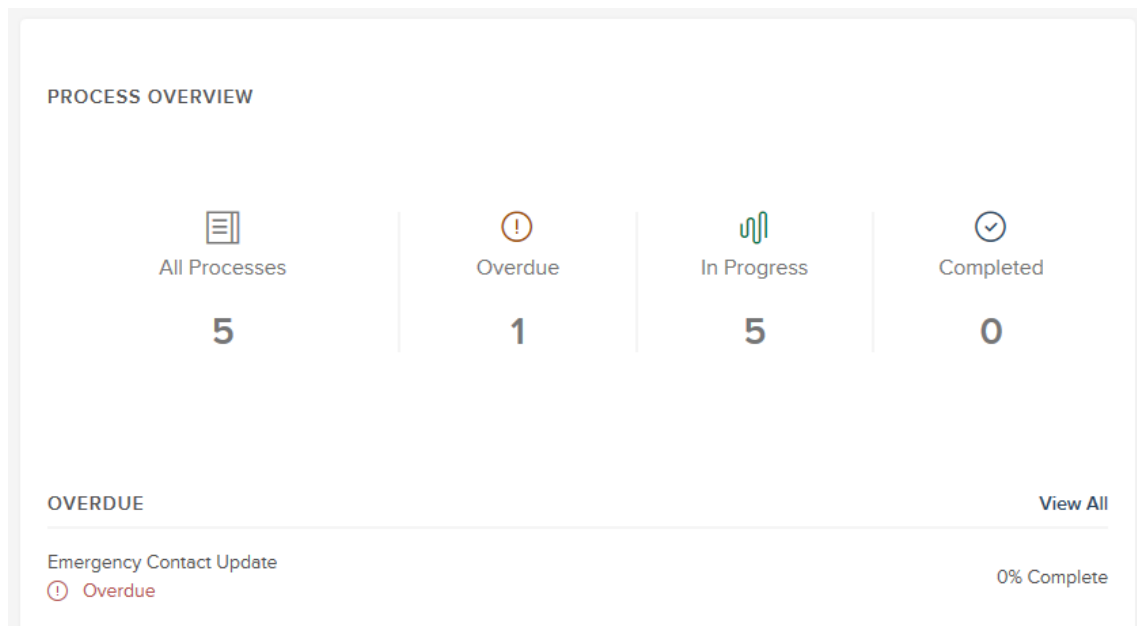
To the right of the Process Overview section is the Task Overview graph. You can click and view individual tasks within processes that have either been started by you or assigned to you. This chart shows the current status of these tasks. You can click the view all button to see a breakdown of each status and the tasks that fall into those status categories.
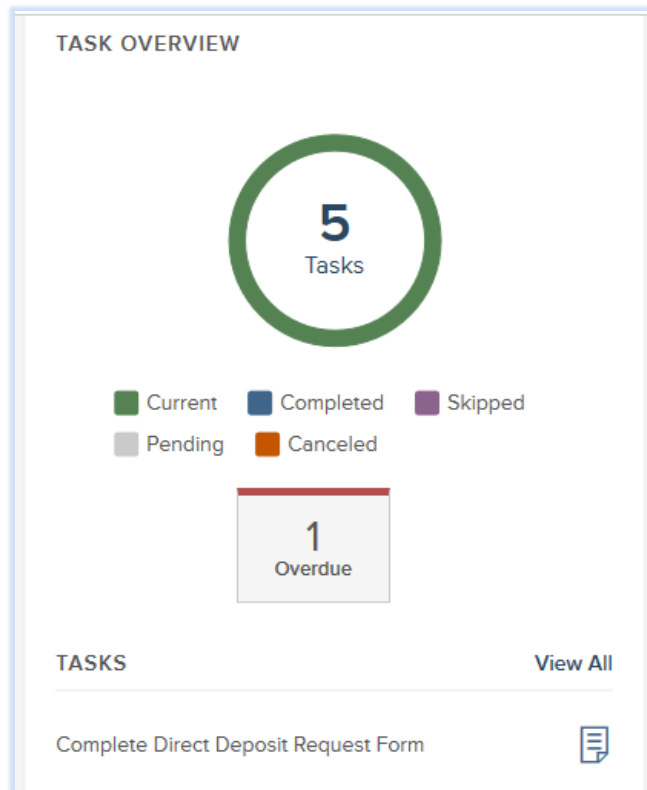

STEP 7: Viewing Completed Tasks

The bottom section of the Self Service Portal displays the Completed Document section. This section will house your completed documents upon a process being completed and approved by all necessary parties. For example, you can always go back to view, download and print out your previously finished documents.
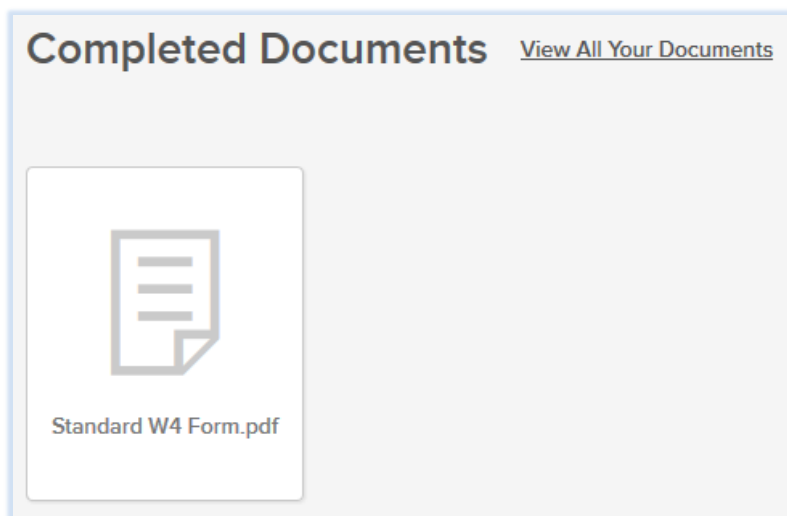
Another route to view completed (fully approved process tasks) is by selecting 'Documents' in the navigation bar.

Self Service Portal   Documents   Downloads

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DUAL ENROLLMENT (ENGLISH)

Documents   Activity   Details   Direct Reports

As noted in STEP 3, select the applicable form folder by clicking the card box or the folder list to the left of your screen. You may also use the Search Bar to locate the desired form.
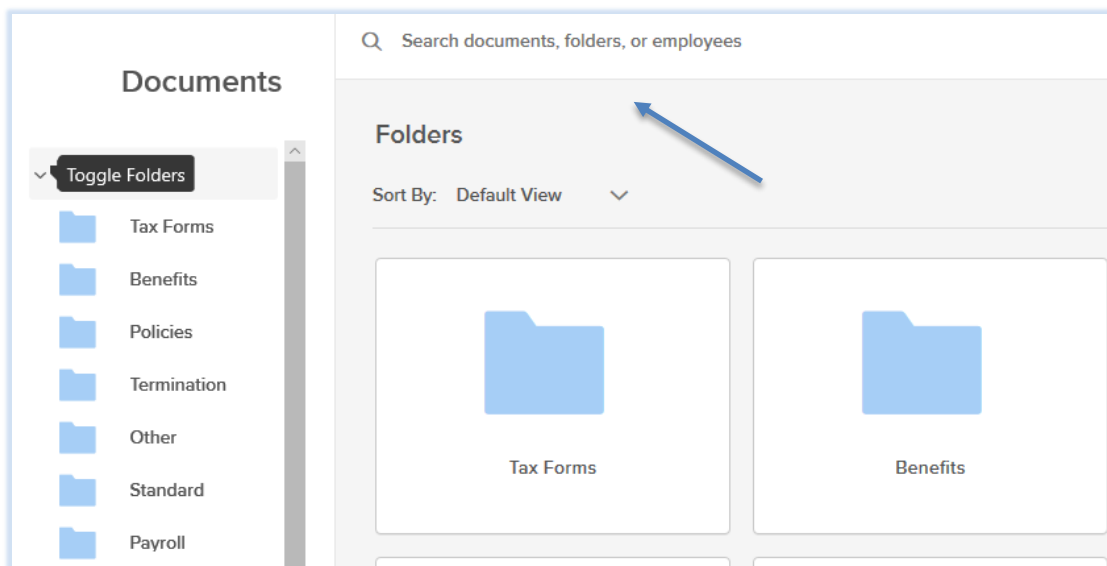
Once you've selected the desired folder and/or located the form, it will indicate the form name, 'updated on' date, employee name, and an Action column. The Action column allows for view or download access.
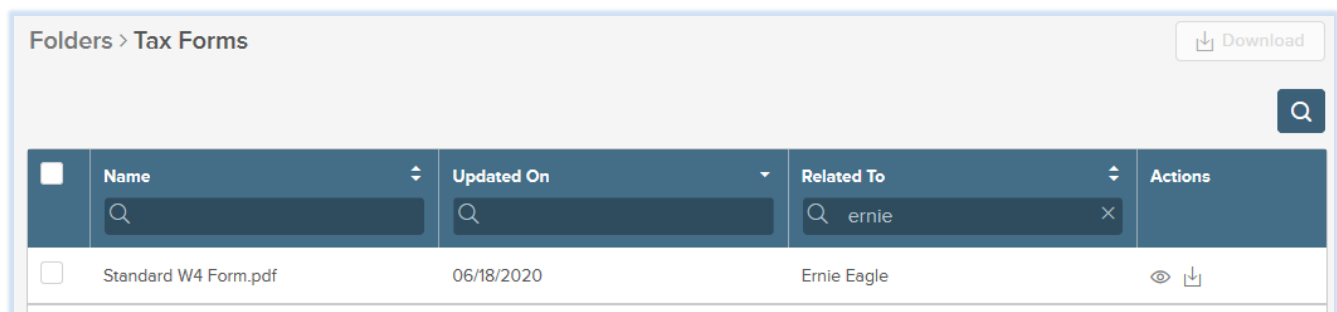
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This concludes our NEOGOV eForms Training Guide! Thank you!

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