



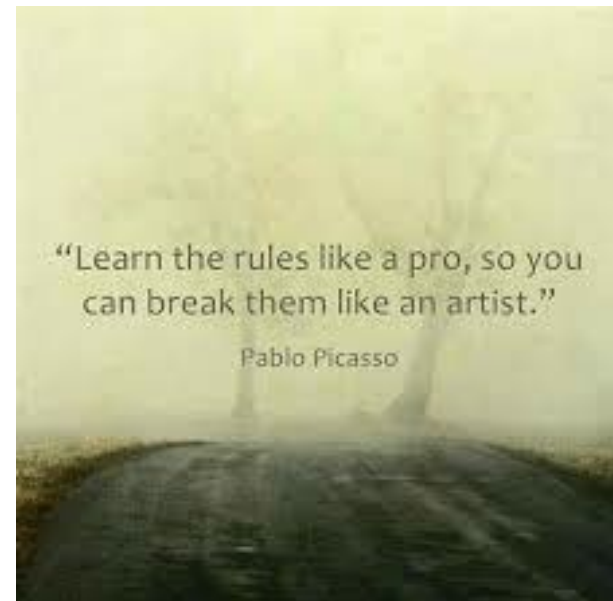
Onboarding Workgroup

December 11, 2024



Reminders for today...

- Add your questions to chat! We will unmute at the end of the call.
- Slides will be uploaded to our Resource Center and emailed out within a few days.
- The meeting will be recorded and will be saved to our Resource center by the end of the week.



Agenda

- Recently Added Functionality
- Current & Upcoming Development Priorities
- Design Work & Future Concepts
- Friendly Reminders & Open Questions



Lets hear from you!

Go to
Pollev.com/carriedever497

**Or scan this QR code
with your phone**





Recently Added Functionality

Multi-select Filtering on Tasks and New Hires Dashboards

Users will be able to select multiple filters in certain fields to further refine results.

Tasks

- Status
- Owner
- Type
- Office

New Hires

- Status
- Invitation/Offer Response
- Customer
- Office
- Onboarding Process Owner
- Form Status
- eOPF Transmission Status



Released to:

Stage: 9/4/24

Production: 9/20/24

Tasks Filters (0) ✕

Keywords
Physical Exam

Task Information ^
Status
× Status 1 × Status 2
Owner
× Tadiwa Mangadze × Carrie Dever
Type
× Customer 1 × Customer 2
Purpose
Select Purpose

Other Information ^
Office
× Office 1 × Office 2 × Customer 3
Date Milestones
Submit Date
between
01/29/2023
and
02/03/2023

☐ Overdue only ☐ ★ Favorites only: ☐

Apply Reset Filters Cancel Changes

New Hires Filters (0) ✕

Keywords
Peach Cutey

New Hire Information ^
Status
All Statuses
Logged In
All Logged In's
Invitation/ Offer Response
× Response 1 × Response 2

Position Information v
Customer, Office, PCS Eligibility

Process Information ^
Onboarding Process Owner
All Onboarding Process Owners
Form Status
× Status 1 × Status 2
eOPF Transmission Status
× Status 1 × Status 2 × Status 5
Date Milestones
Submit Date
between
01/29/2023
and
02/03/2023

★ Favorites only: ☐

Apply Reset Filters Cancel Changes



Selective Service System Interconnection: Refresh Result

Overview

Assignments

Questionnaires

Verify Selective Service System Registration for Eligible New Hires

Email
KFLUFF870@GMAIL.COM

New Hire #
H9IOA-4IY3

Start Date
5/24/2023

Position Title
Inspector

Pay Plan-Series-Grade
GS-1801-6

Customer
Customer A

Office
Philadelphia Services Branch

Request #
No Request Linked

Vacancy #
10151853

Announcement #
TD-DE-23-10151853

Certificate #
20230130-PH-001

Task Details

Due Date

Task Name
Verify Selective Service System Registration for Eligible New Hires

Active Date
04/12/2024

Task Instructions

Completion Date

Task Result
Error

Task Definition ID
31582

Refresh Result

- Refresh Result used 6,250 times and has returned **a non-error task result nearly 100% of the time**
- Only 57 instances after feature use required further action due to error task results
- Achieved a total **time savings of 113.5 hours across all tenants**



Released to:
Stage: 6/7/24
Production: 7/1/24

Verify Selective Service System Registration Task Report

My content

Team content

Team content / USA Staffing Packages and Folders / Hiring Data Warehouse / New Hire



eOPF Transmission Report

Tabular report displaying the onboarding documents and forms and the status of transmissi...

Last Accessed
10/31/2024, 7:14 AM



Forms Management Report

Tabular report displaying new hires with incomplete forms and the next agency action that...

Last Accessed
11/18/2024, 9:00 AM



New Hire Dashboard

Dashboard to display new hire metrics as well as tabular data to provide details about new hires.

Last Accessed
11/20/2024, 3:27 PM



New Hire Detail Report

Tabular report displaying a list of new hires by organization, office, customer, and tags, with detai...

Last Accessed
11/21/2024, 7:55 AM



New Hire Interconnection

Transmission Report

Tabular report displaying a list of new hire interconnection (NHI) transmissions by organizati...

Last Accessed
11/5/2024, 4:20 PM



Verify Selective Service System Registration Task Report

Tabular report displaying an overview by office of the task result for the Verify Selective Service Syst...

Last Accessed
11/15/2024, 7:16 PM



Social Security Number Verification Field

- Pre-Feature Implementation: 2,483 SSN corrections over 3-month period
- Post-Implementation Improvement: 1,589 SSN corrections over 3-month period
- **That's a 36% decrease in SSN corrections across all tenants**

- Enhanced accuracy of OF-306 form submissions
- Reduces delays in onboarding process

Biographic Information ☐ = Incomplete ☑ = Complete * = Required

☒ Identity ☐ Contact

Enter your full legal name below. Your full legal name is required for the purpose of verifying your employment eligibility and performing a background investigation or security clearance. For more information on legal name, please view the online help.

First Name *

Do you have a middle name? *
☐ Yes
☐ No

Last Name *

Suffix (ex. Sr., Jr., III)

Social Security Number *

0 characters remaining

Re-enter Social Security Number *

Entry is a match.



Released to:

Stage: 6/7/24

Production: 7/1/24

Option to change New Hire record when Requester is changed

When a new hire record is created, the Supervisor/Manager field on the Overview page is populated with the information from the Requester field on the Request.

When the Requester is changed, if the Supervisor/Manager has not already changed within the new hire record, the field will be updated to match the Request.

USA Staffing®

REQUEST 20241210-60781

Request 20241210-60781

Request Number: 20241210-60781 Customer: Customer A Request Type: Onboard New Hire Status: Selection Made

Request Information Location Information

Request Information

Request Number: 20241210-60781 Request Type: Onboard New Hire

Requester: Carrie Dever

Hiring Need Validated Date: 12/8/2024

Position Descriptions 1

Position Description Number	Position Title
1210	Request Tester

Position Settings

Security Clearance Required: Not Required Travel Required: Not required

Position Sensitivity

Other Information

Contacts

Supervisor/Manager: Carrie Dever

Onboarding Process Owner: Andrea Brown

HR Contacts: Jessica Link

Benefits Contacts: Hadi Rashid

Payroll Contacts: Tadiwa Mangadze

Additional Contacts

Option to change New Hire record when Requester is changed

From the Request, users will have the option to update the Requester field only or update the Supervisor/Mgr. within the new hire record as well.

The screenshot shows a 'Request Information' form with fields for Request Number (20241210-60781), Request Type (Onboard New Hire), Requesting Customer (Customer A), Requester (Dana Robinson), Request Process Owner, Hiring Need Validated Date (12/8/2024), Request Personnel Action Date (12/9/2024), and Approved By (Dana Robinson). Below this is a 'Position Descriptions' table with one entry: Position Description Number 1210, Position Title Request Tester, Grade 11, and Specialties. The 'Position Settings' section includes Security Clearance Required (Not Required), Travel Required (Not required), and Position Sensitivity. A confirmation dialog box is displayed in the center, asking 'Would you like to make Dana Robinson the Supervisor on the linked New Hire record?' and stating 'The New Hire is currently assigned to the previous Requester.' with buttons for 'Do Not Update' and 'Update Supervisor'. The 'New Hire' section at the bottom contains fields for First Name (Tammy), Middle Name, Last Name (Brown), Suffix, Email (Tammy.Brown1900e@yahoo.com), Office (Washington Services Branch), Duty Location (Compton, California), Position Description Number (1210), Series (0301), and Grade (11). An 'Update Request' button is highlighted in the bottom right corner.

Position Description Number	Position Title	Grade	Specialties
1210	Request Tester	11	

Field	Value
Request Number	20241210-60781
Request Type	Onboard New Hire
Requesting Customer	Customer A
Requester	Dana Robinson
Request Process Owner	
Hiring Need Validated Date	12/8/2024
Request Personnel Action Date	12/9/2024
Approved By	Dana Robinson

Field	Value
Security Clearance Required	Not Required
Travel Required	Not required
Position Sensitivity	

Field	Value
First Name	Tammy
Middle Name	
Last Name	Brown
Suffix	
Email	Tammy.Brown1900e@yahoo.com
Office	Washington Services Branch
Duty Location	Compton, California
Position Description Number	1210
Series	0301
Grade	11

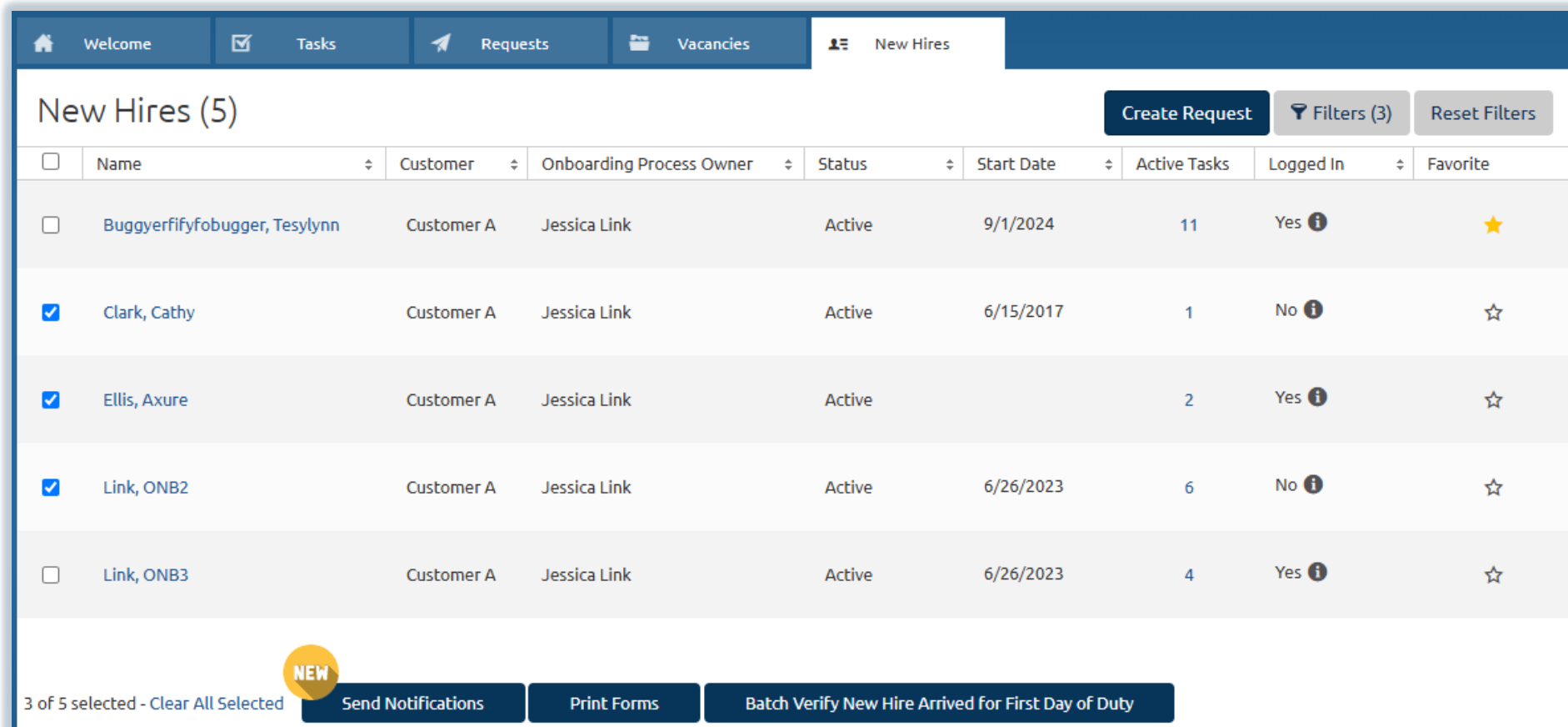


Available on:
Stage: 12/13/24
Production: 1/9/25

Mass Onboarding Notifications from New Hires Dashboard

Replicate current functionality from certificate

- Select new hires across pages
- Send Notifications button
- Select onboarding notification template
 - Invitation
 - Tentative Offer
 - Custom



The screenshot displays the 'New Hires' dashboard. At the top, there's a navigation bar with tabs: Welcome, Tasks, Requests, Vacancies, and New Hires. Below the navigation bar, the title 'New Hires (5)' is shown, followed by buttons for 'Create Request', 'Filters (3)', and 'Reset Filters'. The main content is a table with columns: Name, Customer, Onboarding Process Owner, Status, Start Date, Active Tasks, Logged In, and Favorite. Five rows of new hires are listed. The first row is 'Buggyerfifybugger, Teslyynn' (unselected). The next three rows are 'Clark, Cathy', 'Ellis, Axure', and 'Link, ONB2' (all selected with checkboxes). The last row is 'Link, ONB3' (unselected). At the bottom, there's a summary bar showing '3 of 5 selected - Clear All Selected' and three buttons: 'Send Notifications' (with a 'NEW' badge), 'Print Forms', and 'Batch Verify New Hire Arrived for First Day of Duty'.

<input type="checkbox"/>	Name	Customer	Onboarding Process Owner	Status	Start Date	Active Tasks	Logged In	Favorite
<input type="checkbox"/>	Buggyerfifybugger, Teslyynn	Customer A	Jessica Link	Active	9/1/2024	11	Yes <i>i</i>	★
<input checked="" type="checkbox"/>	Clark, Cathy	Customer A	Jessica Link	Active	6/15/2017	1	No <i>i</i>	☆
<input checked="" type="checkbox"/>	Ellis, Axure	Customer A	Jessica Link	Active		2	Yes <i>i</i>	☆
<input checked="" type="checkbox"/>	Link, ONB2	Customer A	Jessica Link	Active	6/26/2023	6	No <i>i</i>	☆
<input type="checkbox"/>	Link, ONB3	Customer A	Jessica Link	Active	6/26/2023	4	Yes <i>i</i>	☆

3 of 5 selected - Clear All Selected **NEW** Send Notifications Print Forms Batch Verify New Hire Arrived for First Day of Duty



Available on:
Stage: 12/13/24
Production: 1/9/25

Mass Onboarding Notifications from New Hires Dashboard

- Confirmation modal
- When process is complete, user receives system alert and email

Preview Notification

To

Clark, Cathy <Cathy.Clark1900e@gmail.com> Ellis, Axure <jessica.link@opm.gov> Link, ONB2 <jessica.link@opm.gov>

Reply To

Jessica.Link@opm.gov

Subject

Tentative Offer Letter

Cathy Clark,
You have been tentatively selected for the following position.

Position Title: Mathematician
Pay Plan: GS
Series: 1520
Grade: 11

To begin the onboarding process, click the link below to begin.

<https://onboard-test.usastaffing.gov/?newhire=HMD39-75DD&>

Thanks,
Human Resources

Confirmation

Mass New Hire Notifications have been initiated.

Refrain from attempting to send additional notifications from the dashboard until you receive the completion email and alert.

OK

Previewing notification For New Hire Clark, Cathy

1 of 3

<<

<

1

2

3

>

>>

Send Notification to 3 Recipients



Available on:
Stage: 12/13/24
Production: 1/9/25



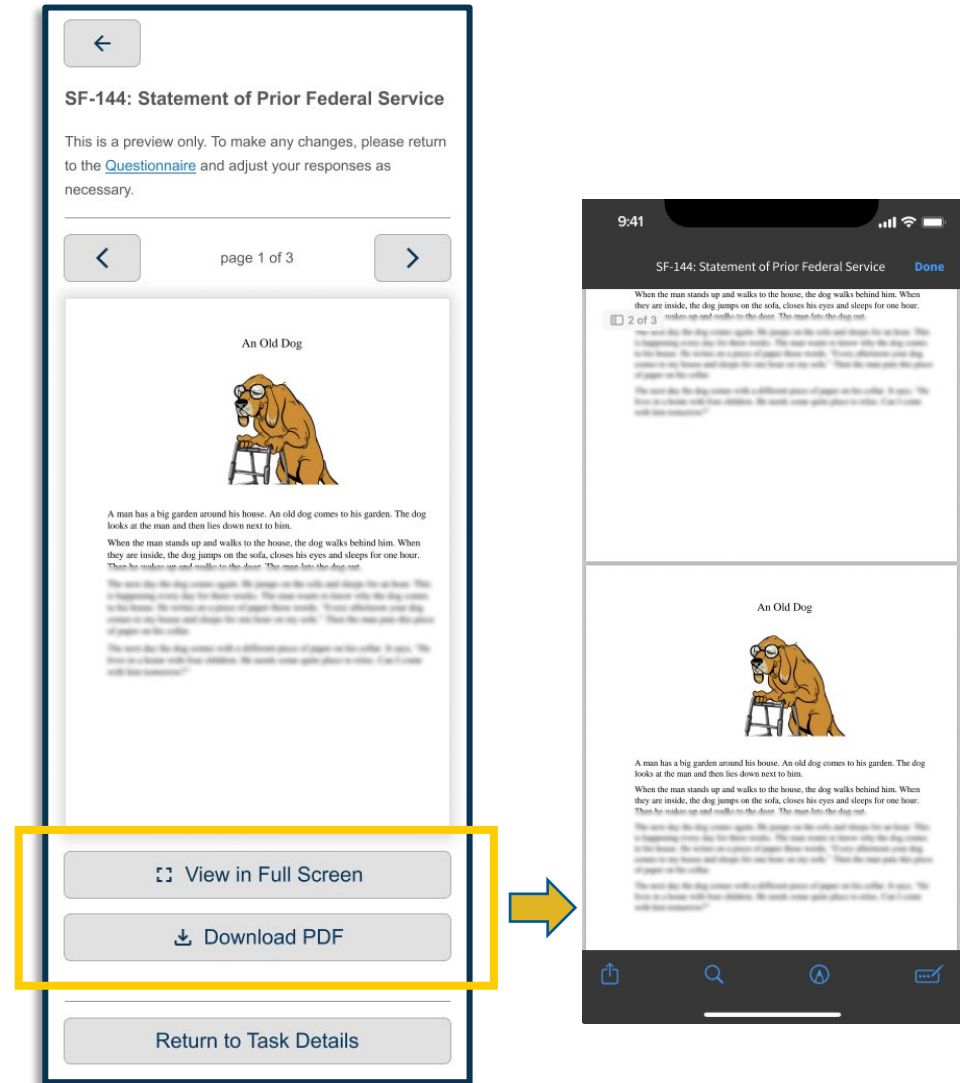
Current & Upcoming Development Priorities

2025 State Tax Forms

- **Between now and mid-December, we are working as many agency specific form requests on our backlog (updates and new forms) as we can.**
 - **11** new agency forms/updates will go to Stage 12/13/24
- **We start researching and analyzing tax form updates Mid to Late December and continue through January.**
 - Tax form updates will become the form priority at this time as all agencies use them.
 - This includes a likely update to the **W 4**.
 - **21** State Tax forms required an update last year – it varies yearly.
 - Goal is to have all tax forms updated in Production by Spring.

Form Visibility in Onboard

- New Hires will be able to see all pages of forms from any device
- Add new options to “View in Full Screen” or “Download PDF”
 - Larger view will allow for easier zooming and scrolling on mobile phones and tablets
- Enhanced navigation will soon let users quickly return to the Questionnaire or Task Details with ease



Note: This is a draft design. Final text and design might differ from this mockup.



A Problem to Solve: Task Ownership

Today

When a request is approved, a new hire is created from a certificate, or a workflow/task is added to new hire, USA Staffing auto-assigns the user who takes the action as the HR Task owner.



The Problem

These business rules do not align with many agencies' method of assigning work, so tasks are often mis-assigned. Without accurate business rules or an efficient way to reassign tasks to the correct owner, tasks are not helpful in tracking workloads.



The Solution

Based on customer feedback on how tasks are managed, reassigned and varying agency ownership practices, we are exploring additional task ownership options to provide a flexible solution to adapt to current needs.



Design Work & Future Concepts

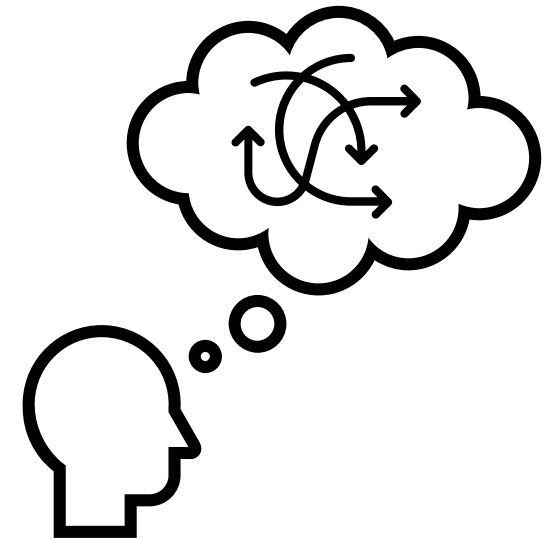
Mobile Onboarding Experience

Research

- Reviewed existing feedback and survey data
- Attended in-person hiring events to observe New Hires onboarding

Key Findings

- Confusion about process completion
- Usability Challenges
 - Form Preview (*current development priority*)
 - Navigation
 - Task and Process Instructions
 - System does not adapt well to smaller screens



Mobile Onboarding Experience

Prioritized Issues

- Form Preview (*current development priority*)
- Navigation experience
- Process completion clarity

Design Goals

- Enhance web page architecture for efficient and seamless page organization
- Provide clearer instructions and visual cues
- Optimize navigation for seamless use on both mobile and desktop devices

Onboarding Milestones (Design Research)

Background

- Hiring process becomes fragmented after New Hires begin onboarding
- Milestones are inconsistently defined across agencies and often tracked externally (e.g., Excel)
- Lack of transparency and standardization causes inefficiencies for HR, New Hires, Leadership and other invested stakeholders

The problem to solve

- No unified definition of milestones in onboarding phase, which leads to challenges with
 - Visibility into Hiring progress
 - Workload management and reporting
 - Identifying bottlenecks in “time to hire”

Onboarding Milestones (Design Research)

What is a milestone?

- A significant, discrete point in the hiring/onboarding process
- Marks progress and involves key actions or approvals
- May require a status change or handoff between [HR] users
- Serves as a critical indicator of workflow progression and bottlenecks
- Likely non-linear

Onboarding Milestones (Design Research)

For Example...

- Offer/Invitation
- Background Investigation Initiated
- Conditions of Employment
- Pre-Day 1 (Administrative)
- Day 1 Activities
- Post-Day 1 (Final Elections Transmission)

Next Steps

- Understand milestones tracked by your organization

We want to learn more about milestones used within your agency

Go to
PollEv.com/carriedever497

Or scan this QR code
with your phone



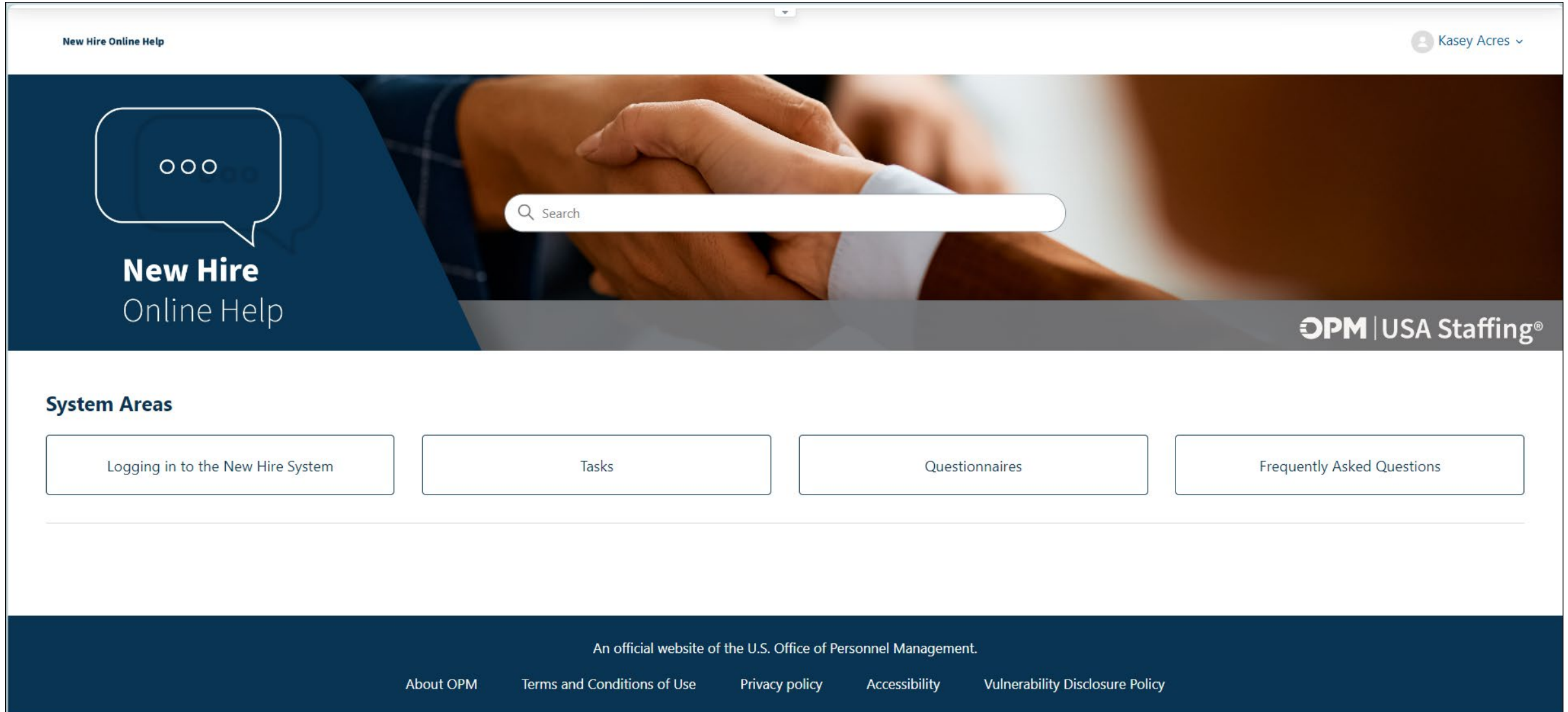


Friendly Reminders & Open Questions

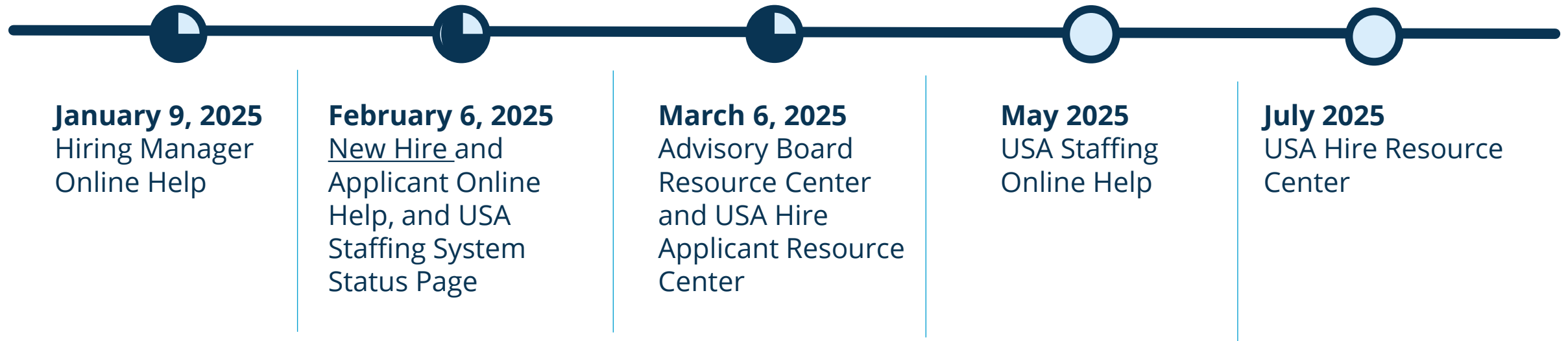
Medical and Biometric Records Cannot Be Collected or Stored in USA Staffing

- USA Staffing is not covered by SORNs OPM GOVT-10 or by OPM CENTRAL-9.
- Therefore, agencies **may not** use USA Staffing for the collection nor storage of medical records, vaccination information or fingerprint cards in a new hire's record.

Onboard Online Help Upgrade



Online Help, System Status & Resource Center Upgrade Timeline



Best Practices



Task Instructions

Provide clear instructions for Document Review and Document Upload tasks.



Task Due Dates

Ensure task due dates are accurate and current



Contact Us

Enter user information in the record for new hires to contact with questions

Open Questions

- What questions do you have for the USA Staffing team?
- Is there anything you'd like to see from us or another agency partner?





Resources

USA Staffing Resource Center

Under the New Hire & Onboarding Resources section:

https://help.usastaffing.gov/USAS/index.php?title=USA_Staffing_Resource_Center

<https://help.usastaffing.gov/ResourceCenter/index.php/Resources>

Online Help

Search for information by Page and by Task

https://help.usastaffing.gov/USAS/index.php?title=Help_for_USA_Staffing_HR_Users

Thank you for joining us!



Future Questions?

Your USA Staffing Account Manager can assist in answering any questions and can include the applicable onboarding team member.