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Onboarding Forms Configuration Guide

Updated November 2020

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Overview

As part of the transition to the USA Staffing, agencies need to provide configuration information for each form the agency would like to have completed and generated using the system. This guide can be used to assist your agency in completing the Form Configuration Spreadsheet, which is used to designate form permission categories and form workflows to be used when configuring forms for your agency. The sections in this document correspond to the column headings in the Form Configuration Spreadsheet and provide additional information to be used when completing the Form Configuration Spreadsheet. Additionally, for each form, you will need to specify if you want the form transmittable to eOPF as a form (generated by USA Staffing) or as an uploaded document, by providing a Yes/No response in the column. An example from the Form Configuration Spreadsheet can be seen in Figure 1.

Document Number	Form Permission Category	Form Workflow	Transmit To eOPF
I 9	Entrance on Duty	Workflow #33	No
OF 306	Pre-Employment	Workflow 36	Yes

Figure 1: Form Configuration Spreadsheet Example

Form Permission Categories

Form permission categories control what form related action a user can perform for any form associated with the category. These form actions may include: accept a form, return for signature, return for new hire correction, return for HR correction, edit questionnaire item responses and transmit to eOPF.

Form Permission Category	Description
Administrative Forms	For onboarding forms to be designated as “Administrative”
Benefit Forms	For onboarding forms to be designated as “Benefit”
Employment Condition Forms	For onboarding forms to be designated as “Employment Condition”
Entrance-On-Duty Forms	For onboarding forms to be designated as “Entrance-On-Duty”
Investigation Forms	For onboarding forms to be designated as “Investigation”
Payroll Forms	For onboarding forms to be designated as “Payroll”
Pre-Employment Forms	For onboarding forms to be designated as “Pre-Employment”
Security Forms	For onboarding forms to be designated as “Security”
Training Forms	For onboarding forms to be designated as “Training”

Onboarding Form Workflows

Form workflows are used by the system to determine, communicate, and control what actions the specific role can perform at various steps of the form completion process. You can refer to Table 1 below for a summary of the key actions that are part of each of the form workflows. **NOTE:** All prior workflows (1 – 21) have been depreciated. The visual process flow for each workflow can be viewed in the Appendix.

Table 1: Summary of Key Actions

			Form Workflow																										
	Role	Action	22	23	24	25	26	27	28	29	30	31	32	33	34	35	36	37	38	39	40	41	42	43	44	45	46	47	48
Regular Forms	New Hire	Required Questions Answered			X	X	X	X	X	X	X	X	X	X	X	X	X	X	X		X		X		X	X	X	X	X
		Submit Form									X								X		X					X			
		Sign & Submit Form			X		X		X			X		X			X	X		X		X	X	X	X		X	X	X
		Sign and Submit Form after EOD						X		X			X		X	X													
		Confirm Form Printed				X												X											
	Appointee	Sign and Submit Form after EOD															X												
	Human Resources	Initial Required Questions Answered	X																								X		
		Required Questions Answered	X	X	X									X	X	X	X				X				X	X	X	X	
		Accept Form			X		X	X								X	X		X			X	X			X	X		
		Sign and Accept Form							X	X				X	X						X			X	X				
		Return for New Hire Signature															X												
		Return for New Hire Correction			X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X
		Return for HR Correction	X	X	X		X	X	X	X				X	X	X	X		X		X			X	X	X	X	X	X
		Return for New Hire to Print																X											
		Confirm Form Printed																X							X			X	X
		Release Form	X	X																									
PCS Forms Only	Authorizing Official	Sign Form	X																										
	Certifying Official	Sign and Accept Form	X	X																									
	Approving Official	Sign Form	X	X																									

Recommended Workflows for Standard Forms

Below is a selection of standard forms and the recommended workflows for each.

Form Number	Transmittable to eOPF Test Instance	Workflow Number
DG 60	X	Workflow #24
FMS 2231		Workflow #26
I 9	X	Workflow #33
OF 306	X	Workflow #36
SF 1152		Workflow #25
SF 1199a		Workflow #24
SF 144	X	Workflow #24
SF 15	X	Workflow #30
SF 181		Workflow #34
SF 256		Workflow #34
SF 2808		Workflow #25
SF 2809	X	Workflow #34
SF 2817	X	Workflow #34
SF 2823		Workflow #25
SF 3102		Workflow #25
SF 3109	X	Workflow #35
SF 312		Workflow #25

Form Number	Transmittable to eOPF Test Instance	Workflow Number
SF 61	X	Workflow #34
TSP 1	X	Workflow #34
TSP 1C	X	Workflow #34
TSP 3		Workflow #25
USAS EDU-01		Workflow #26
W4		Workflow #24

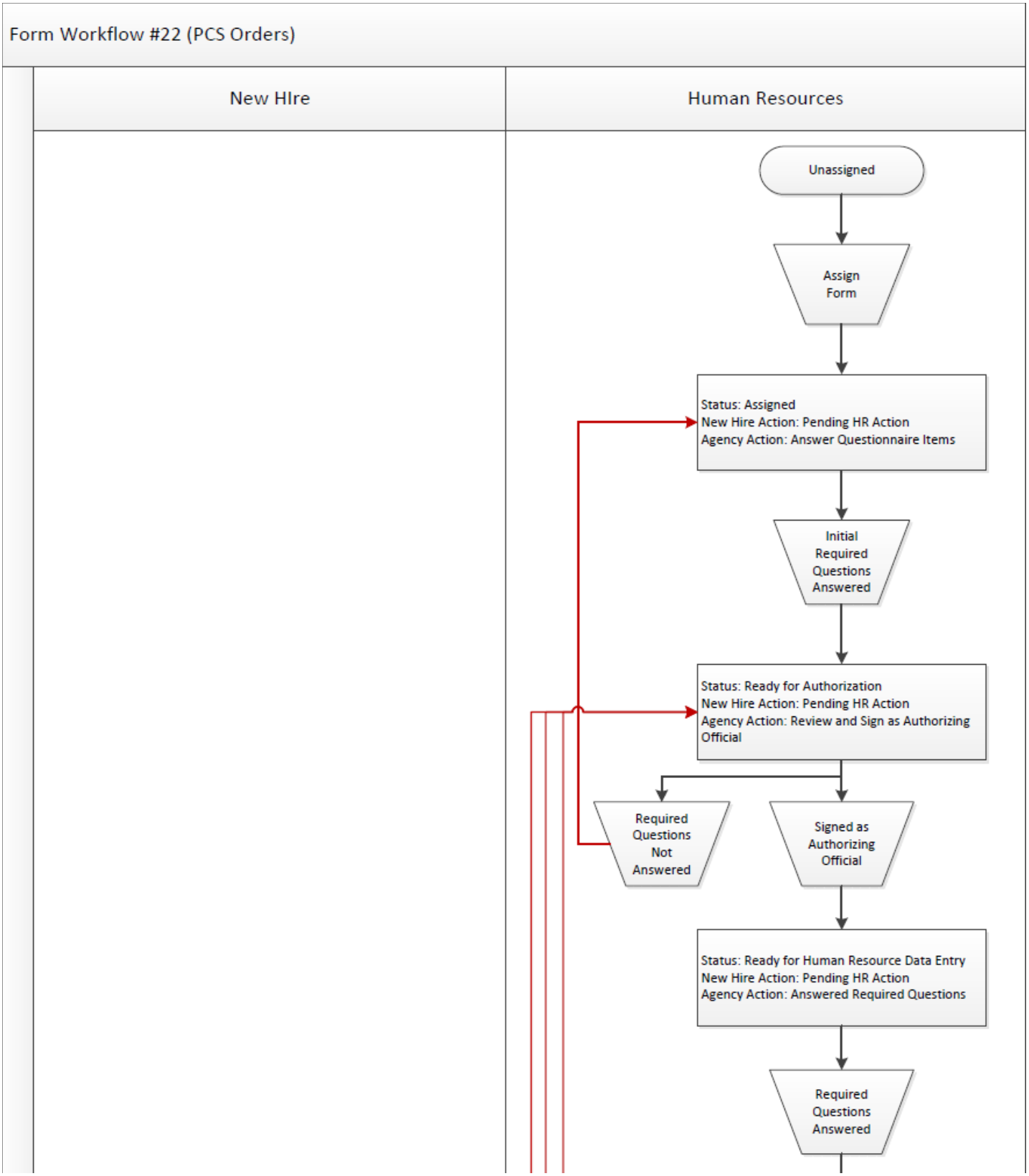
Onboarding Form System Event Descriptions

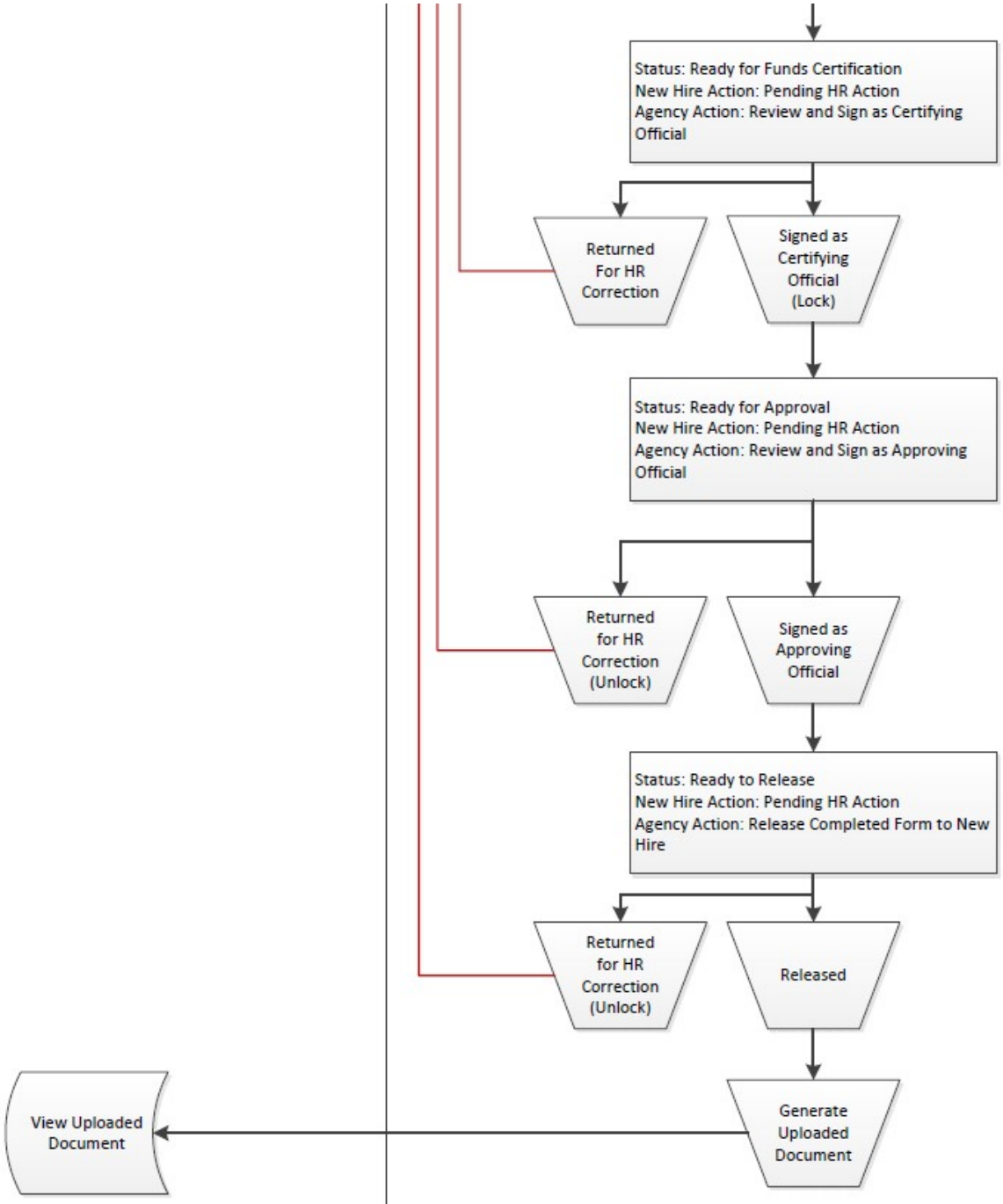
System Event	Description
Assign Form	When performed, the system establishes the initial Next New Hire Action and Next Agency Action.
Initial Required Questions Answered	Determined by the system and occurs when HR answers all HR editable questions required by the form prior to allowing the new hire to sign and/or submit the form. **NOTE:** Depending on the form, the initially required questions could trigger the display of conditional questions for the new hire to answer.
Initial Required Questions Not Answered	Determined by the system and occurs when HR clears their response to a question required by the form, after all required HR editable questions were previously answered. **NOTE:** Depending on the form, deleting a response from an initially required question could trigger the hiding of conditional questions from the new hire, clearing their previous response.
Required Questions Answered	Determined by the system and occurs when a new hire answers all new hire editable questions required by the form prior to being prompted to sign, submit, or print the form. Also occurs when HR answers all HR editable questions required by the form prior to HR being allowed to sign and/or accept the form.
Required Questions Not Answered	Determined by the system and occurs when a new hire clears their response to a question required by the form, after all required new hire editable questions were previously answered. Also occurs when HR clears their response to a question required by the form, after all required HR editable questions were previously answered.
Sign and Submit Form	When performed, the system will apply an electronic signature on the form and submit the form to HR. Additionally, all new hire editable questions used by the form are locked and no longer editable.
Sign and Submit Form after EOD	When performed, the system performs the same actions defined in the Sign and Submit Form action. This action is only presented to the new hire after Human Resources has verified the new hire arrived for their first day of duty.
Submit Form	When performed, the system will submit the form to HR and all new hire editable questions used by the form are locked and no longer editable.
Return for New Hire Correction	When performed, HR is prompted to identify the questions that need to be corrected. This then returns the form back to the new hire for correction, along with any other forms using the selected questions. All signatures applied to the form by the new hire and/or HR are cleared

System Event	Description
	and the selected questions are unlocked and the new hire is allowed to make changes. The new hire must then re-submit the form to HR.
Return for New Hire Signature	When performed, the form is returned to the new hire and all signatures applied by the new hire and/or HR are retained.
Sign and Accept Form	When performed, the system will apply an electronic signature on the form and accepts the form. Additionally, all HR editable questions used by the form are no longer editable.
Accept Form	When performed, the system will accept the form and all HR editable questions used by the form are no longer editable.
Return for Human Resources Correction	When performed, the form is no longer accepted by HR, all HR editable questions locked by the form are unlocked (provided no other form using the questions are accepted), and all HR signatures are cleared from the form. The new hire signatures are retained.
Return for New Hire to Print	When performed, the form is returned to the new hire and instructs them to print the form. This is normally used to indicate they need to print the form to sign with pen and ink.
Confirm Form Printed	Presented to the new hire or HR when a form needs to be printed. This action does not actually trigger the printing of the form; rather, after the form is printed this button is clicked to confirm the form was actually printed, using the option available in the PDF viewer or browser. This will update the status of the form to Complete.
Release Form (DOD PCS Forms Only)	When performed, the system generates the form as a PDF and saves it as an uploaded document. At this point, the form can be unassigned and reassigned in order to perform additional amendments to PCS orders. **NOTE:** This function is only available for DOD PCS forms and is used in conjunction with the PCS Eligible flag in the new hire record to allow the released document to be viewable by the new hire in the onboarding interface.

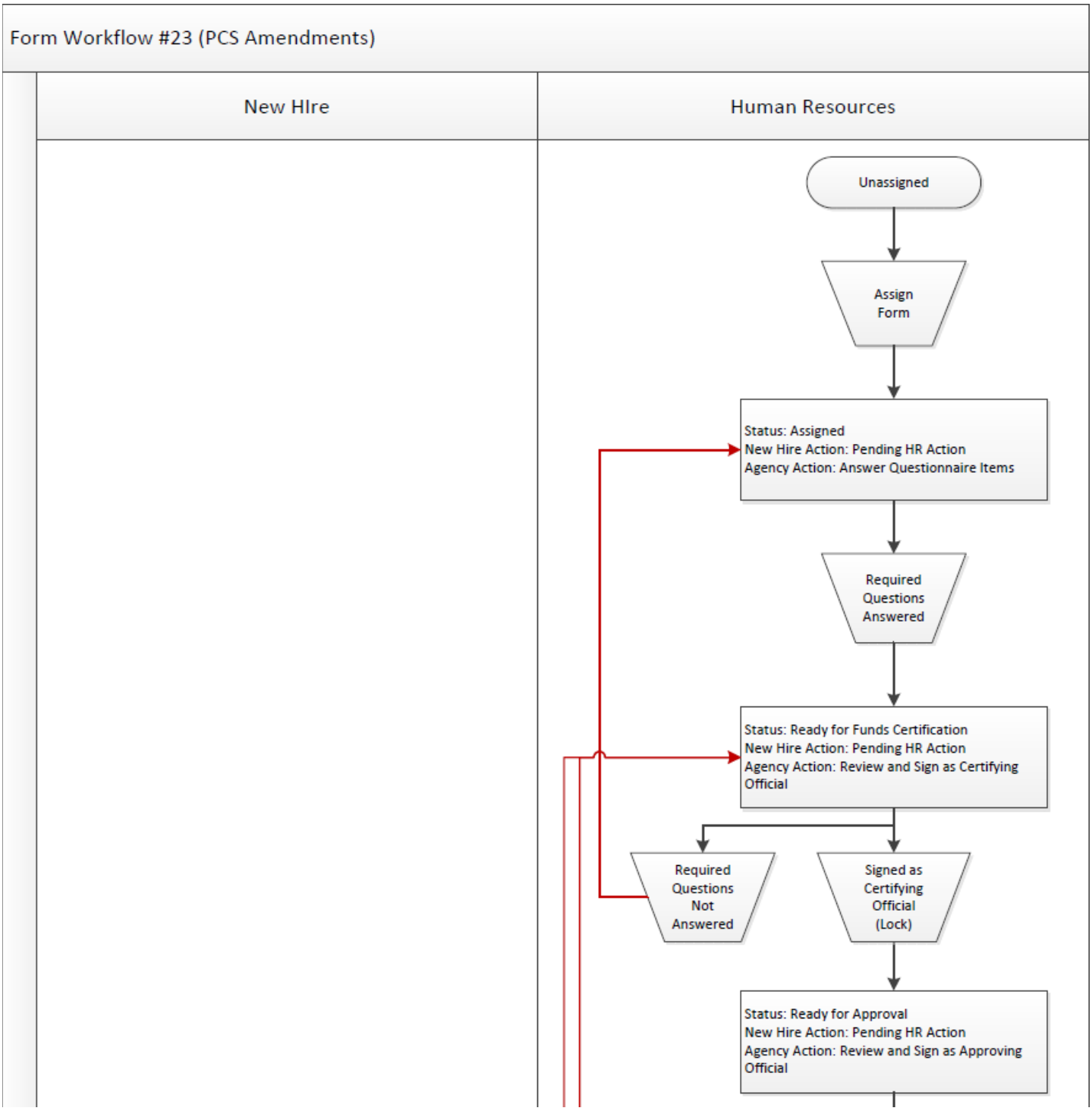
APPENDIX – Form Workflow Visual Flow Diagrams

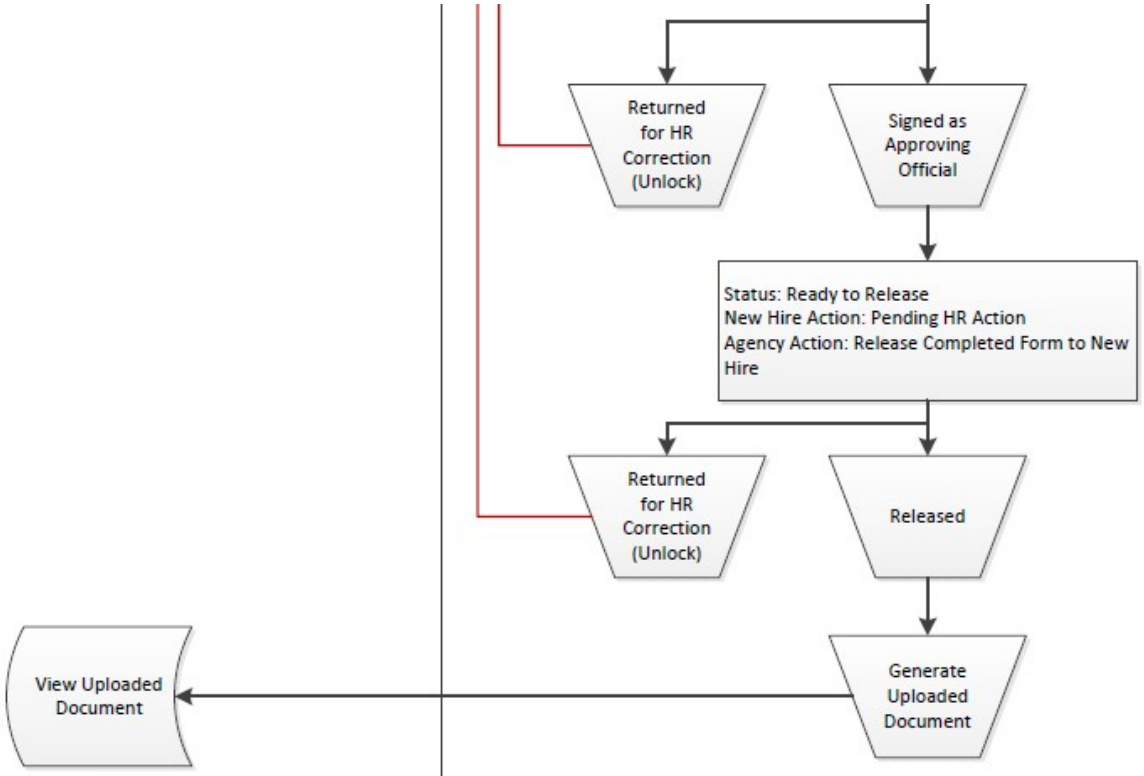
Form Workflow #22



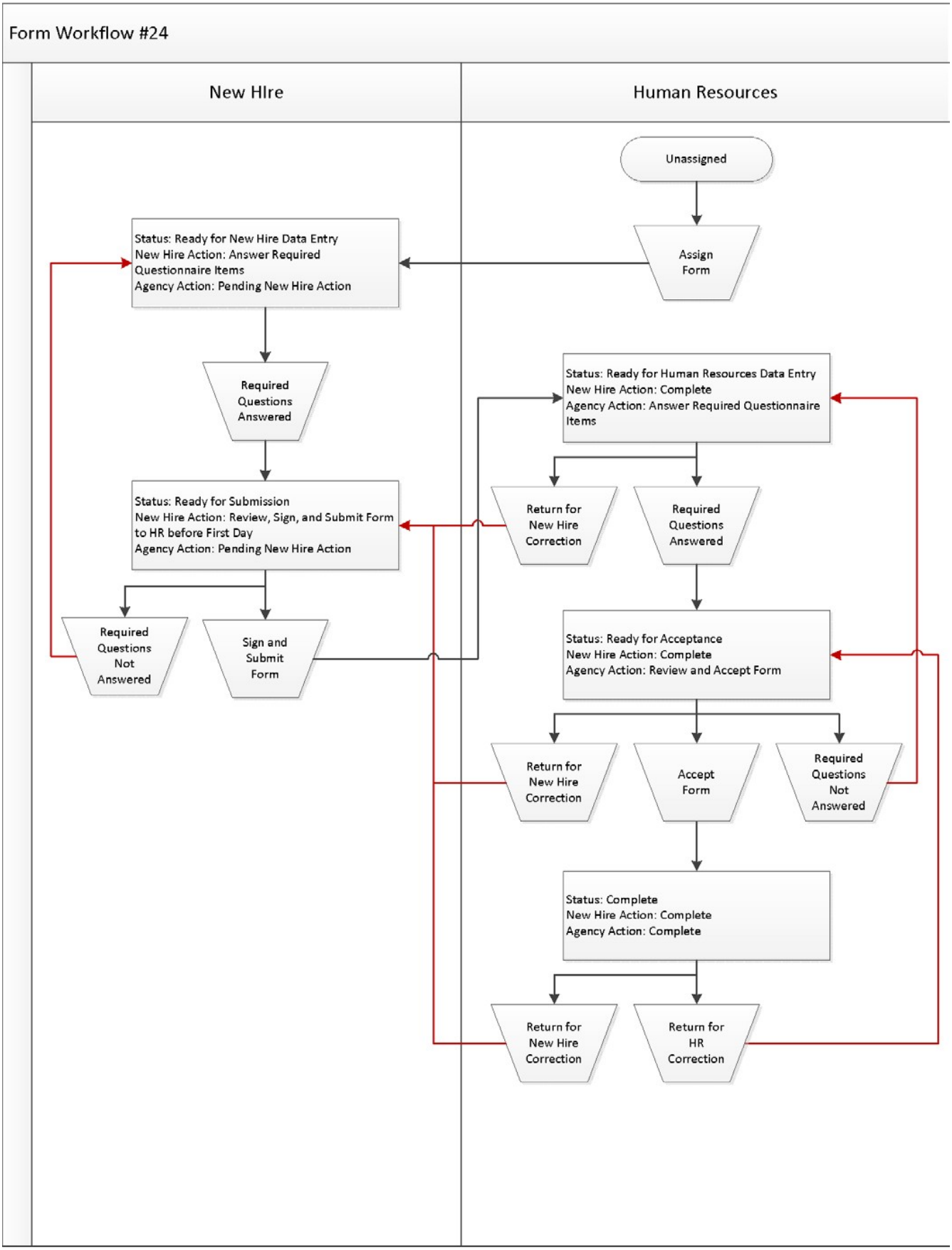

Status: Ready for Funds Certification
New Hire Action: Pending HR Action
Agency Action: Review and Sign as Certifying Official
Returned For HR Correction
Signed as Certifying Official (Lock)
Status: Ready for Approval
New Hire Action: Pending HR Action
Agency Action: Review and Sign as Approving Official
Returned for HR Correction (Unlock)
Signed as Approving Official
Status: Ready to Release
New Hire Action: Pending HR Action
Agency Action: Release Completed Form to New Hire
Returned for HR Correction (Unlock)
Released
View Uploaded Document
Generate Uploaded Document

Form Workflow #23




Returned for HR Correction (Unlock)
Signed as Approving Official
Status: Ready to Release
New Hire Action: Pending HR Action
Agency Action: Release Completed Form to New Hire
Returned for HR Correction (Unlock)
Released
View Uploaded Document
Generate Uploaded Document

Form Workflow #24



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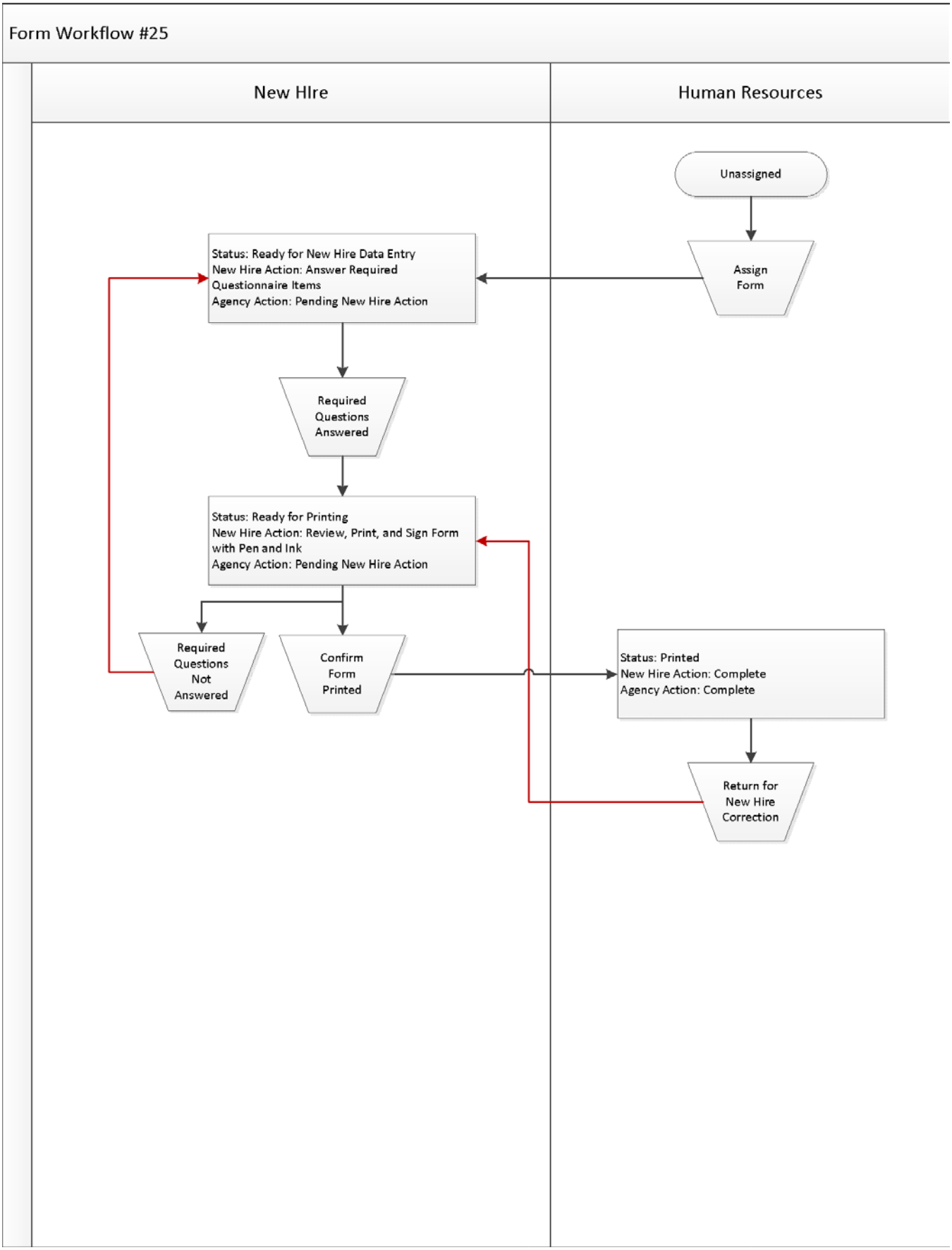

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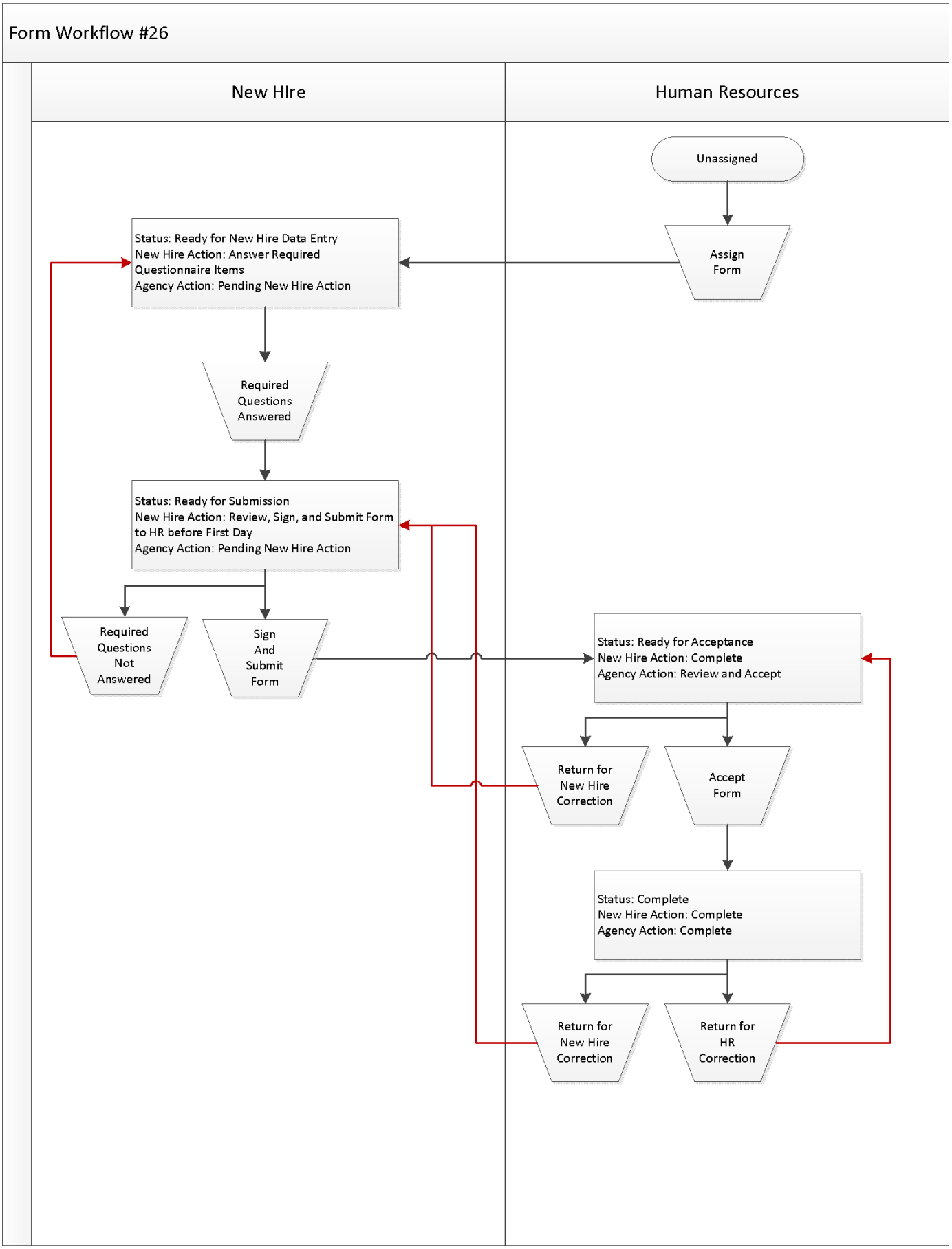

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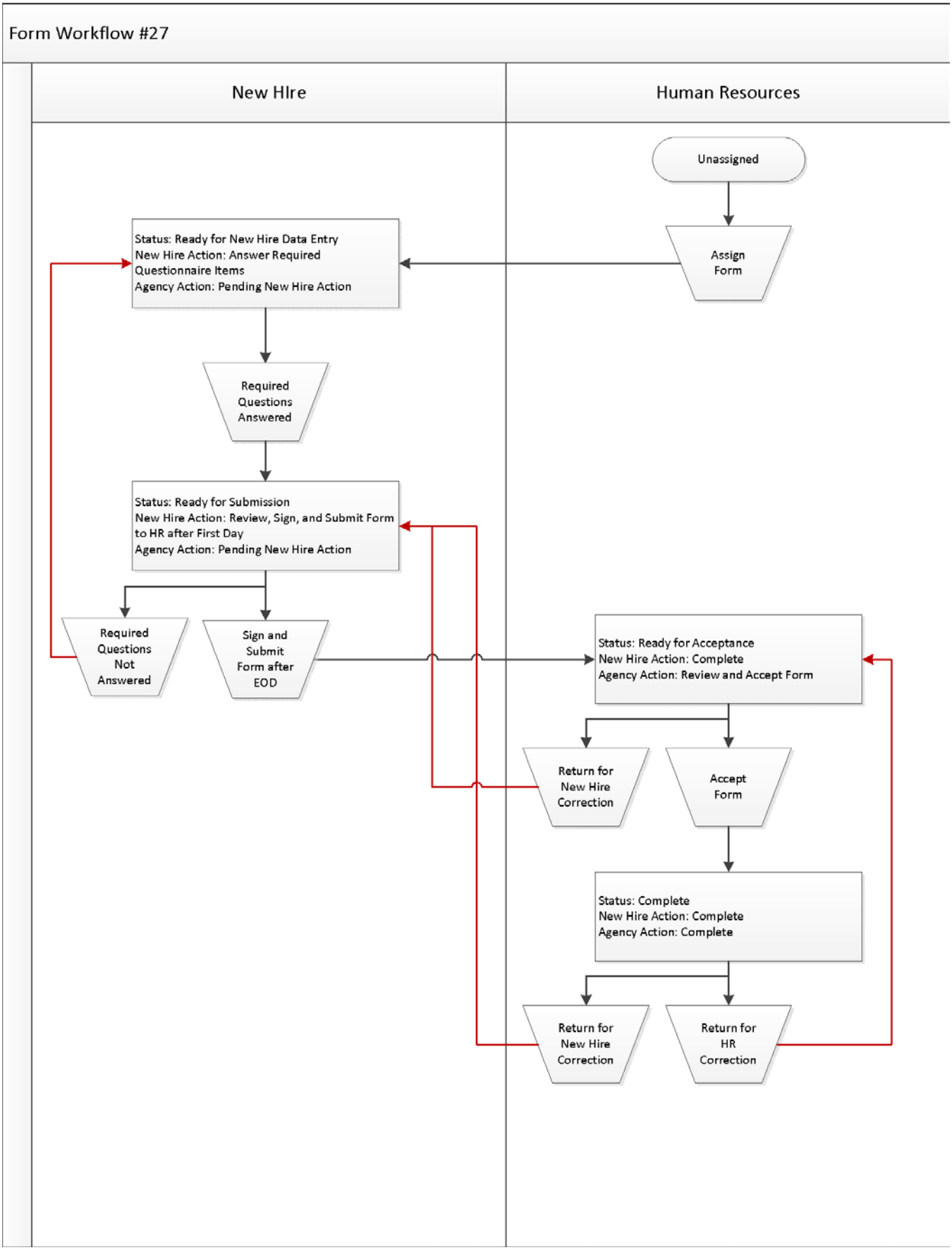

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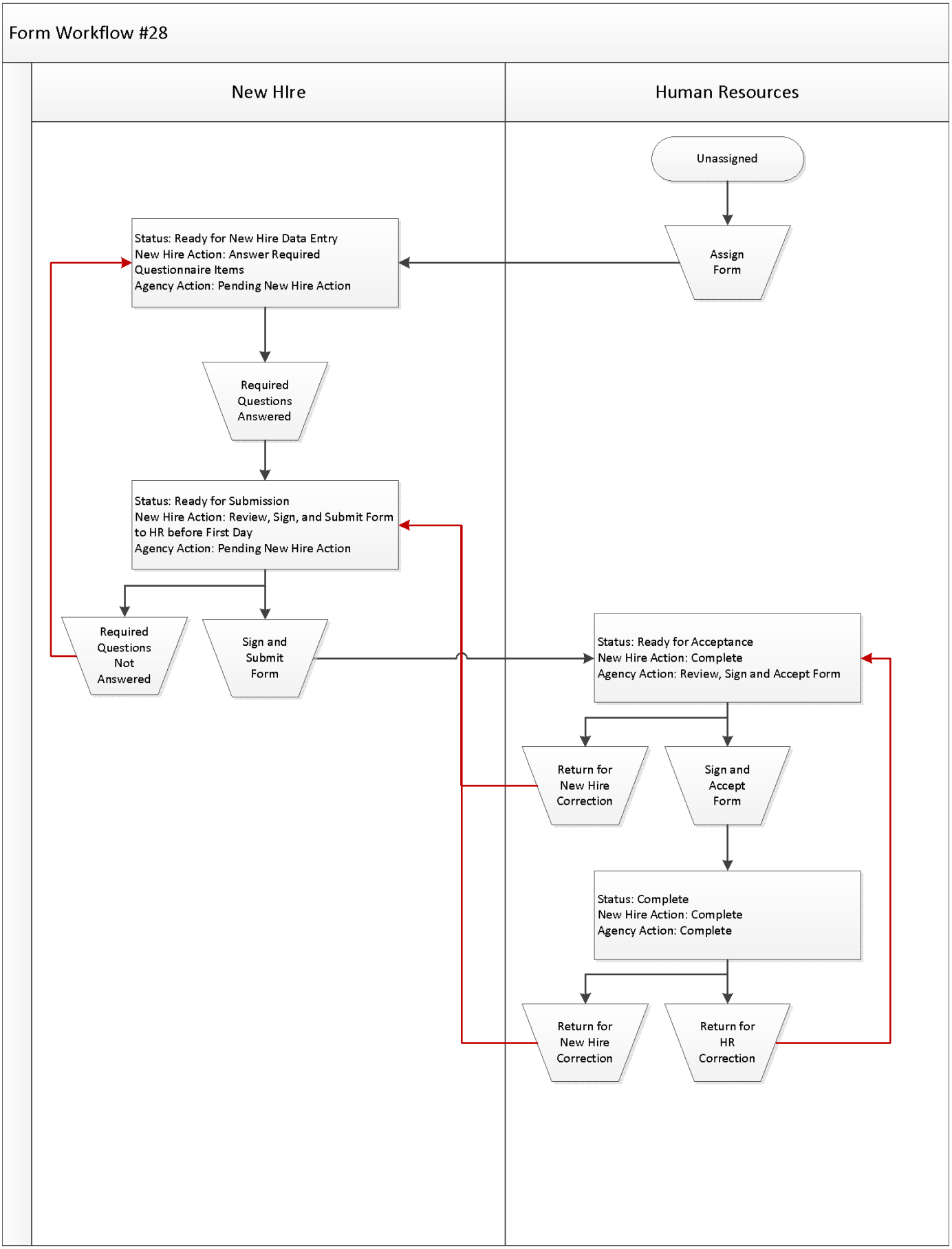

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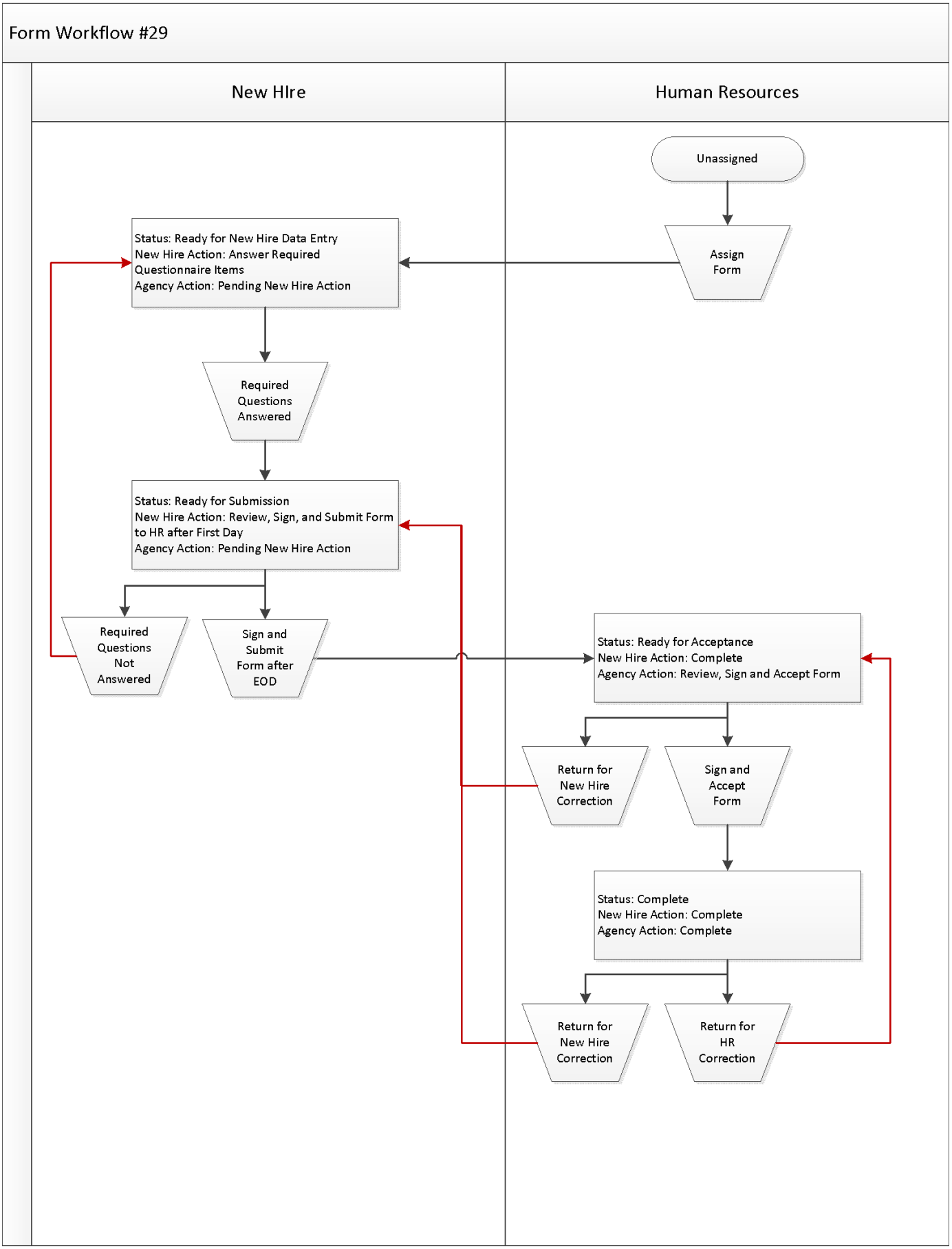

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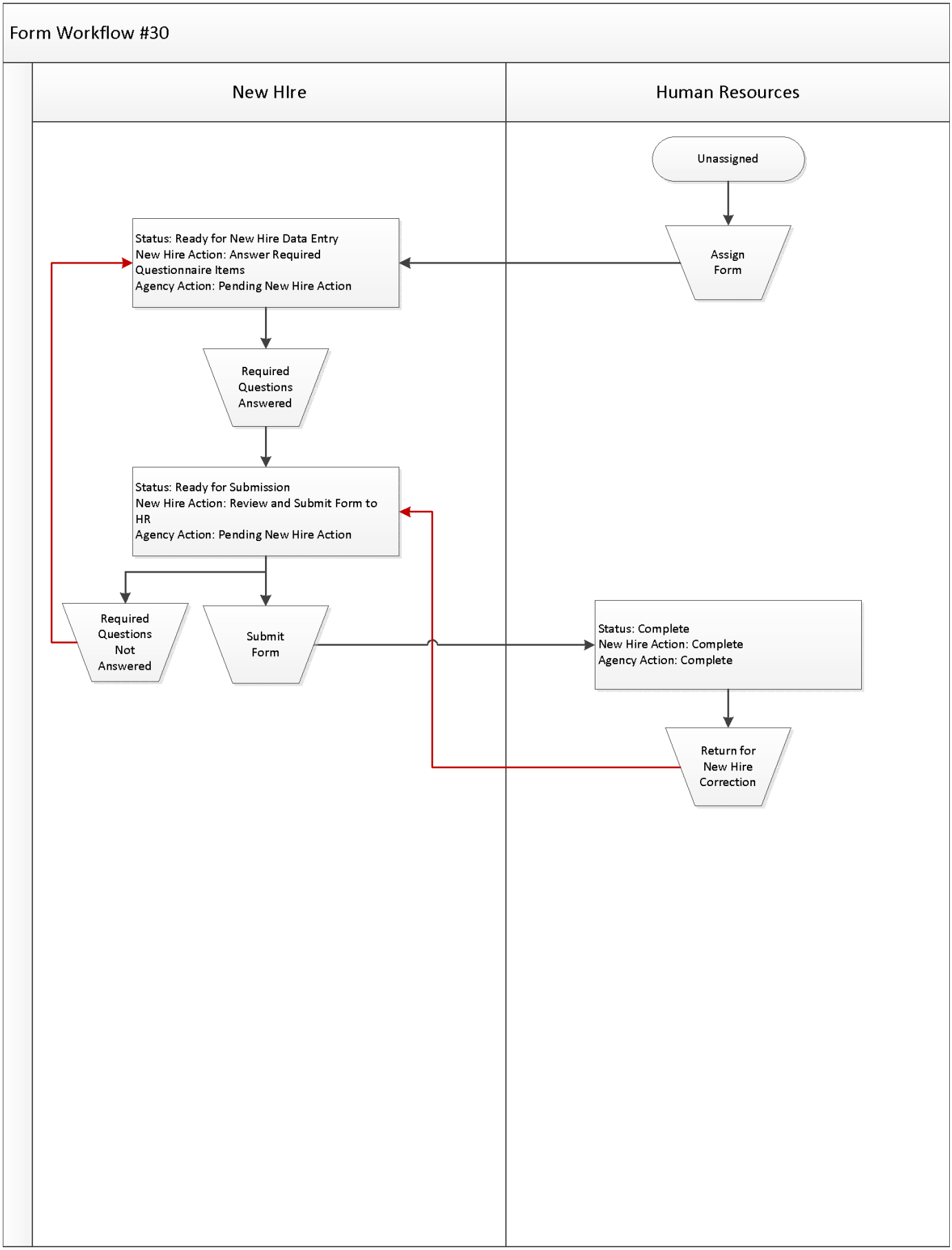

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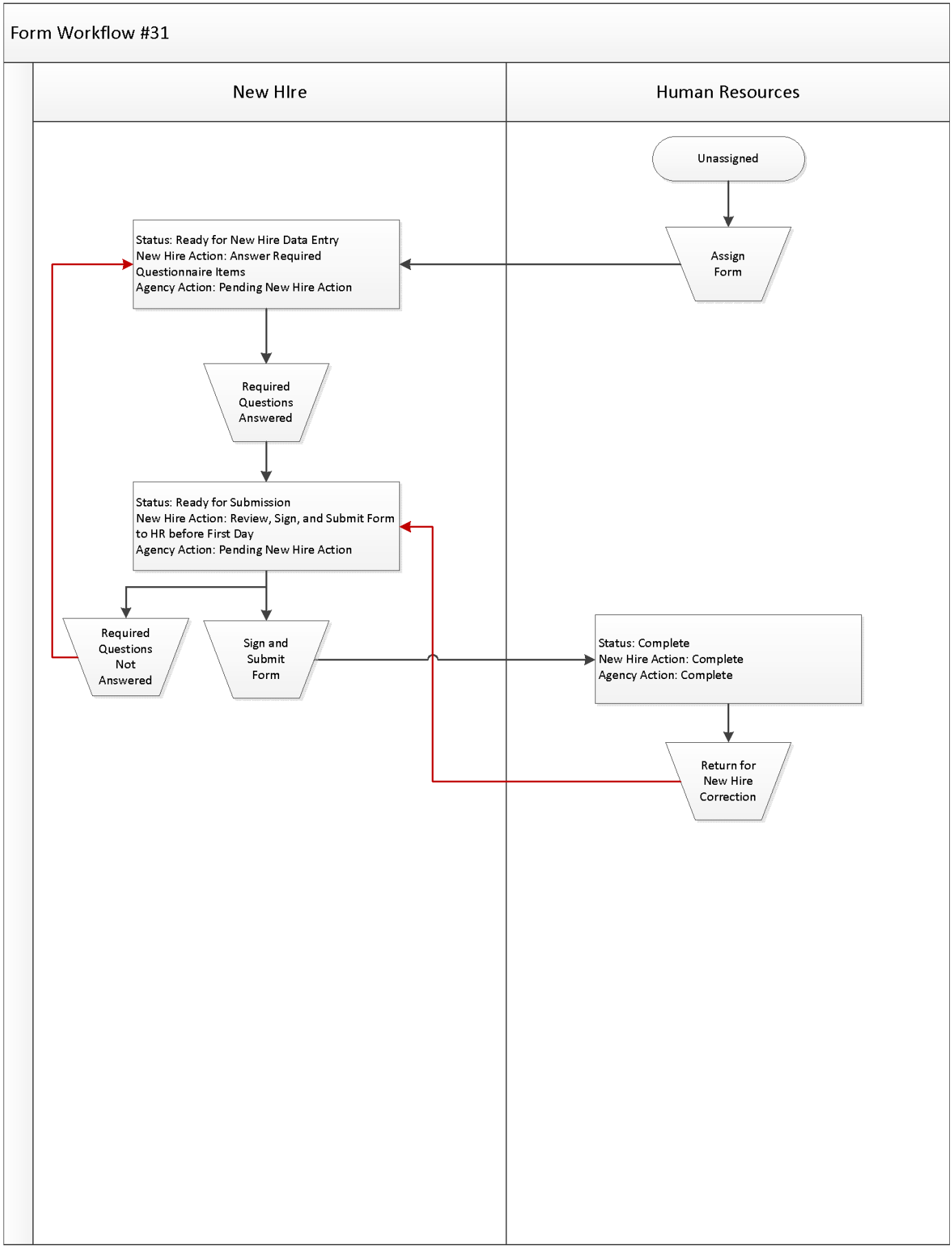

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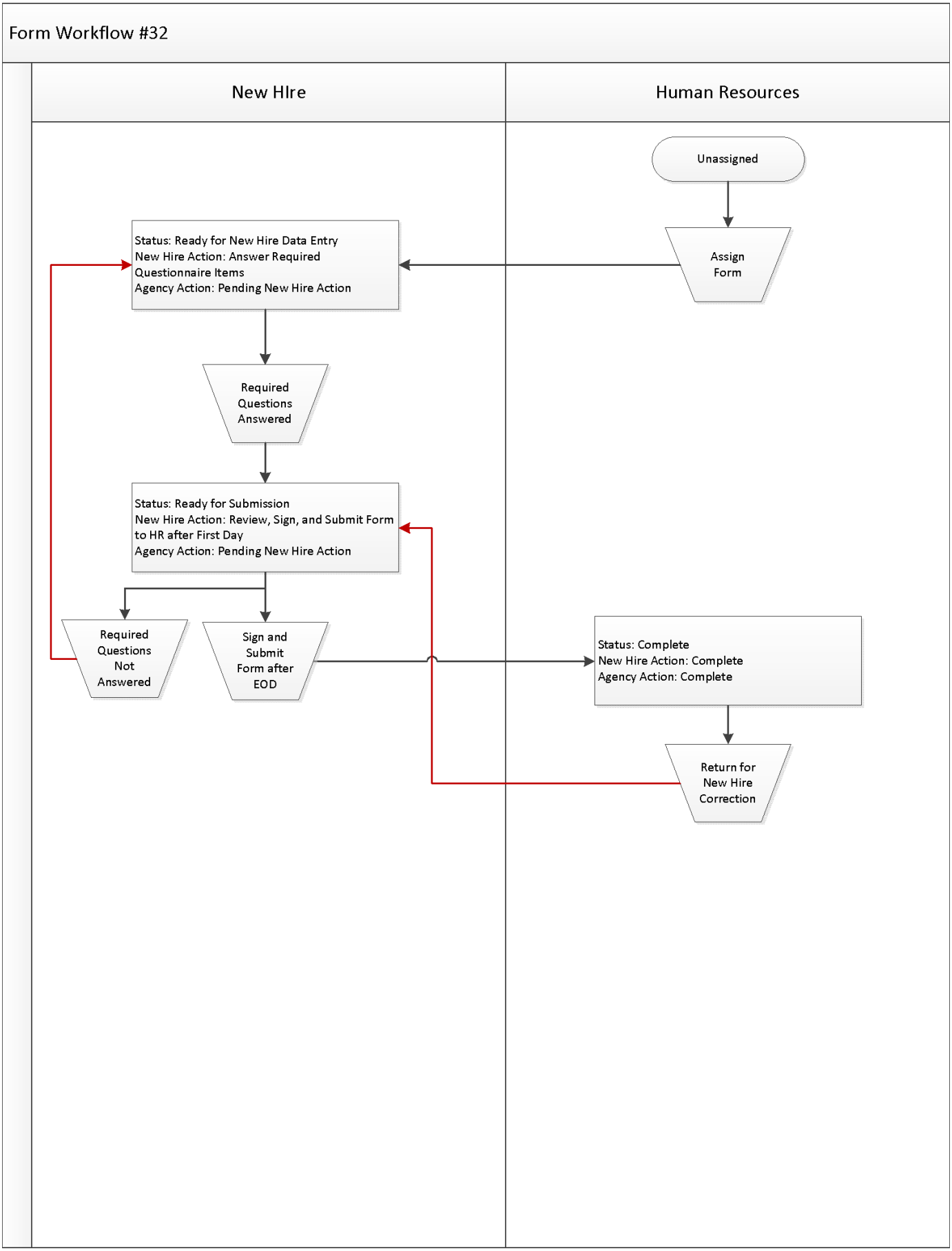

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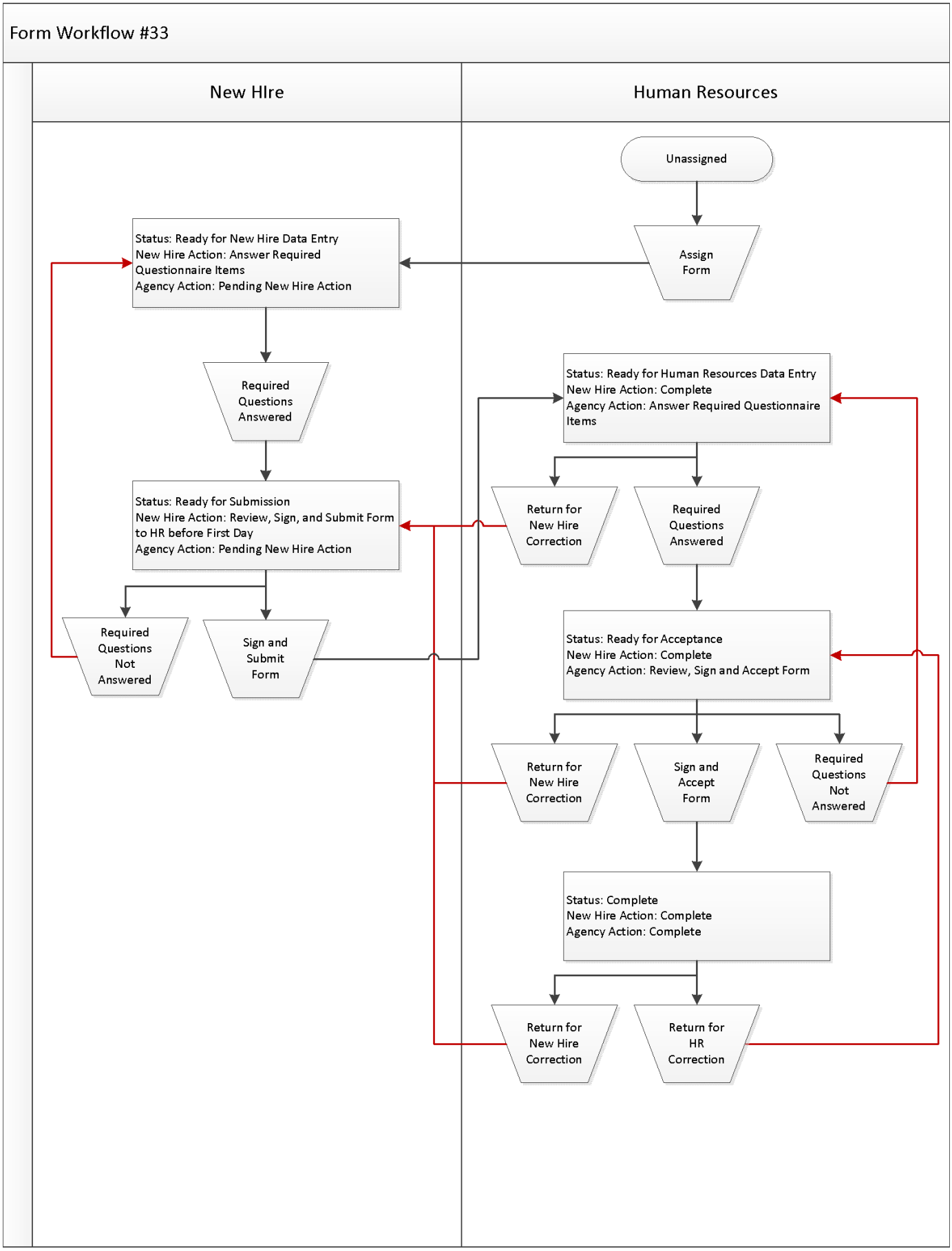

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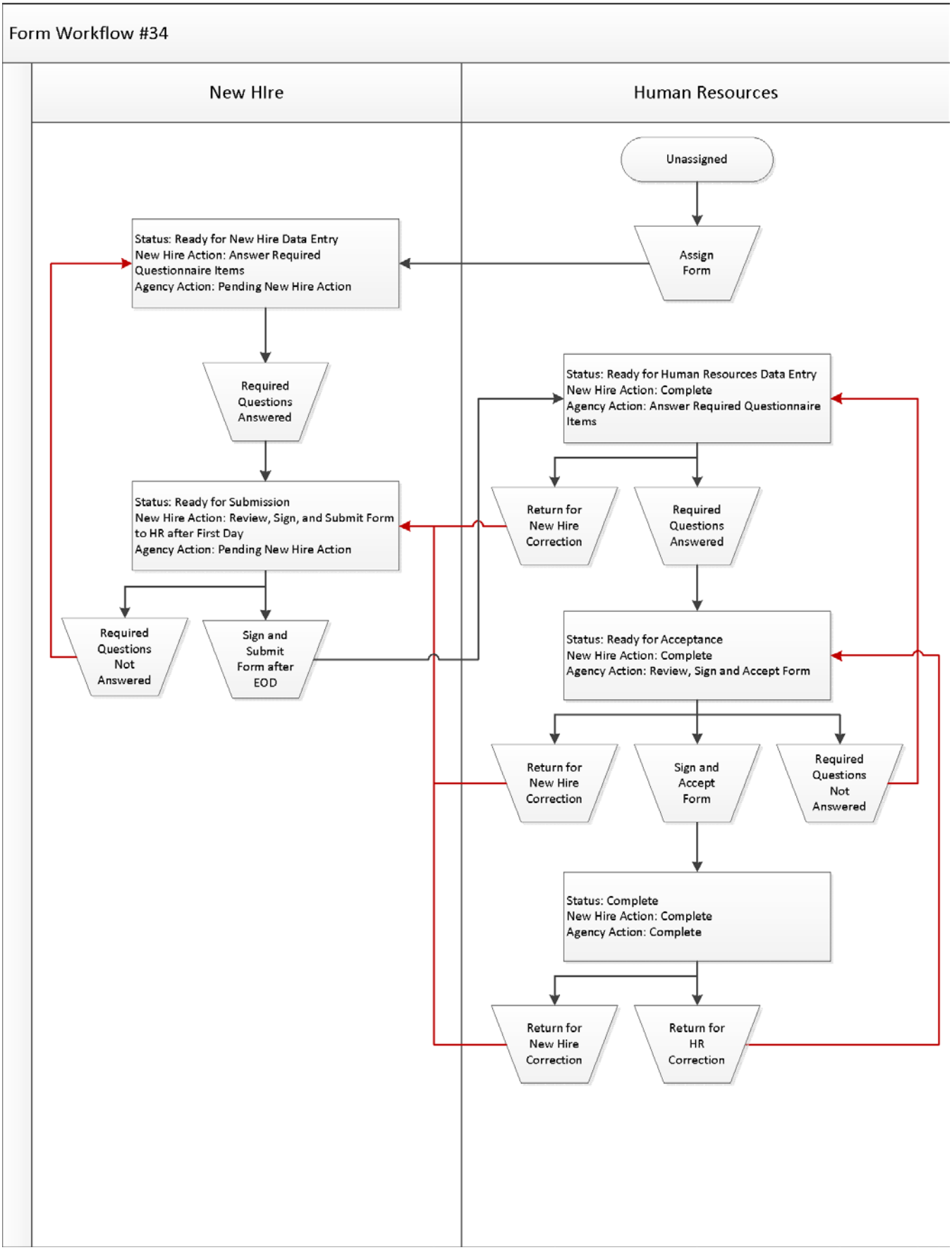

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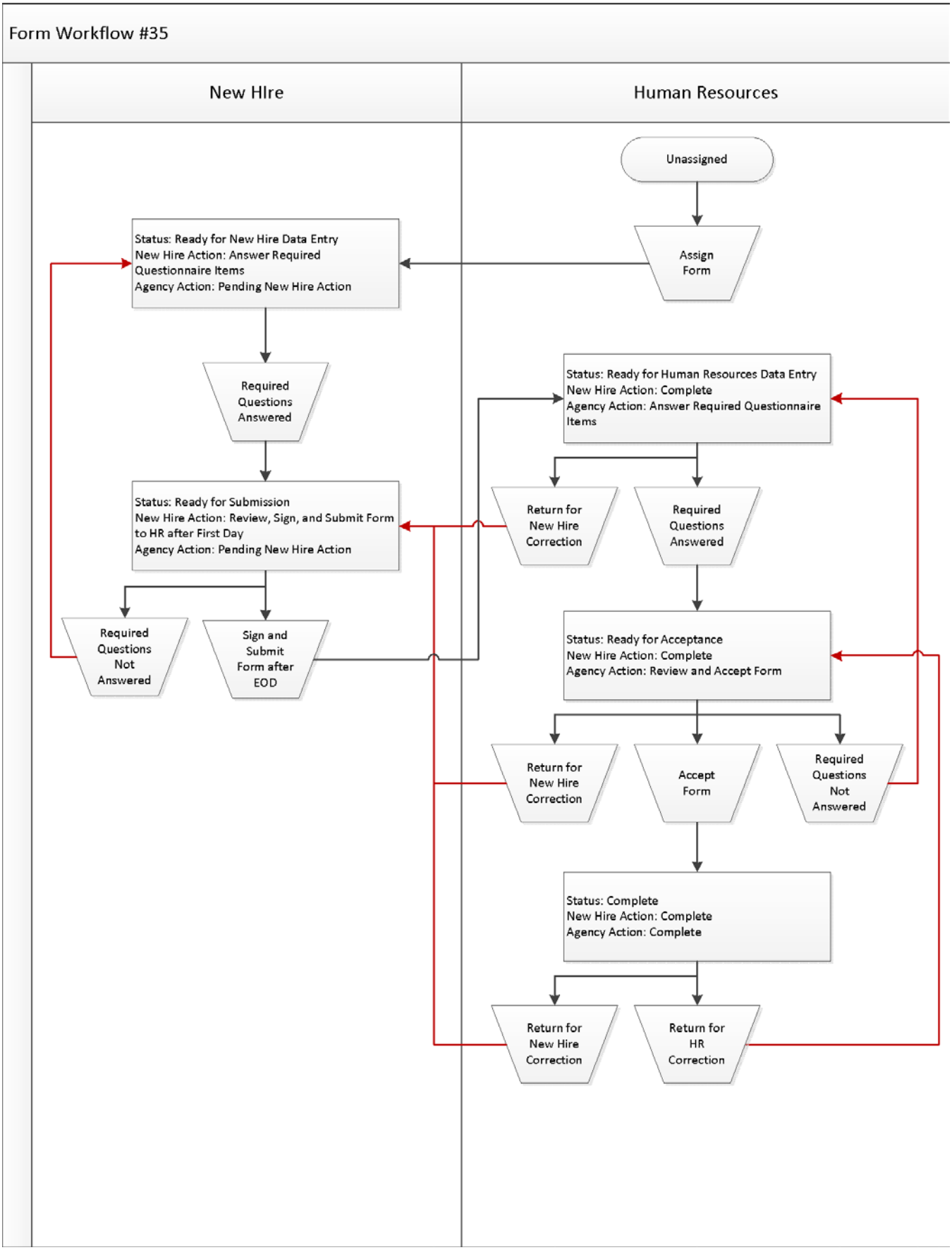

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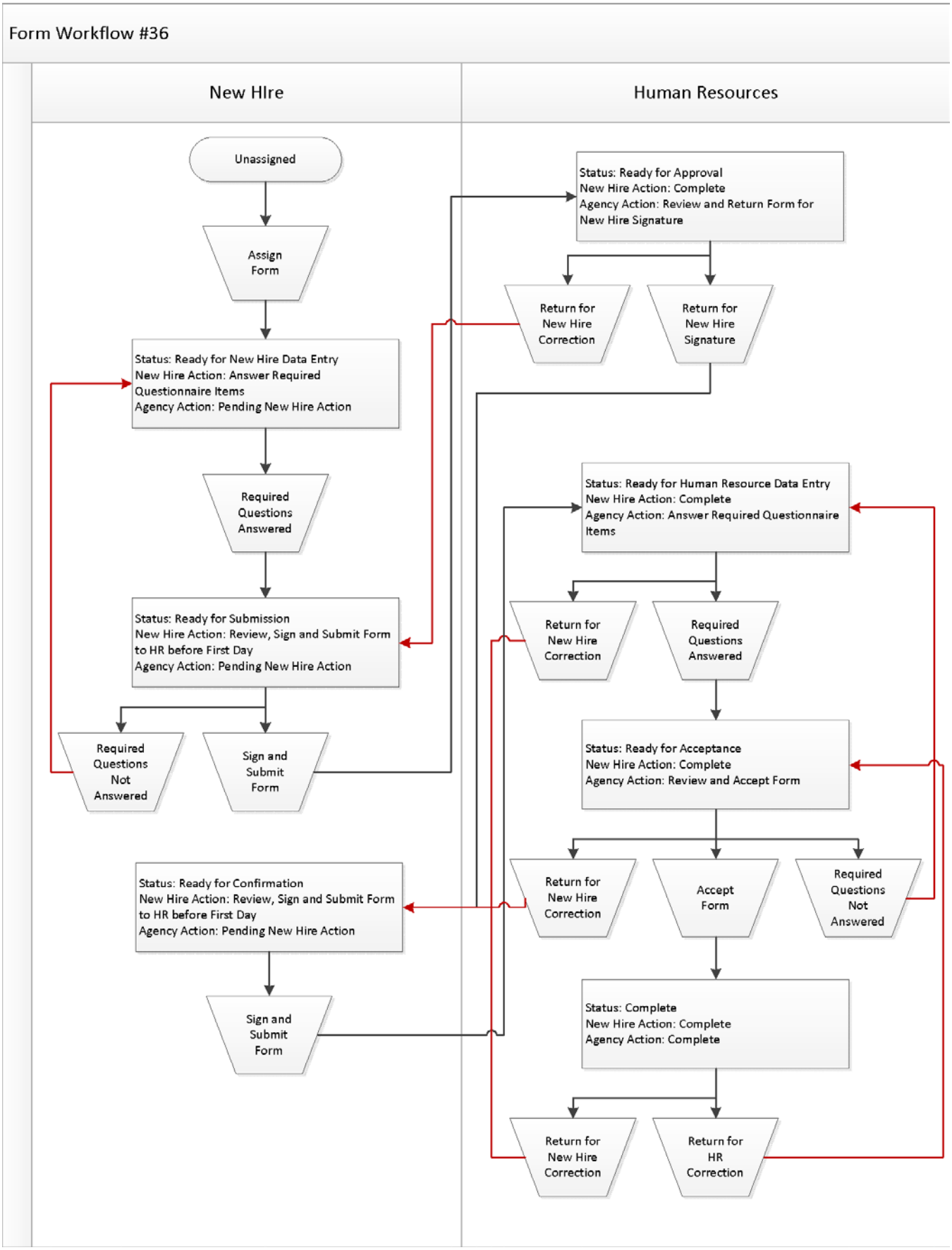

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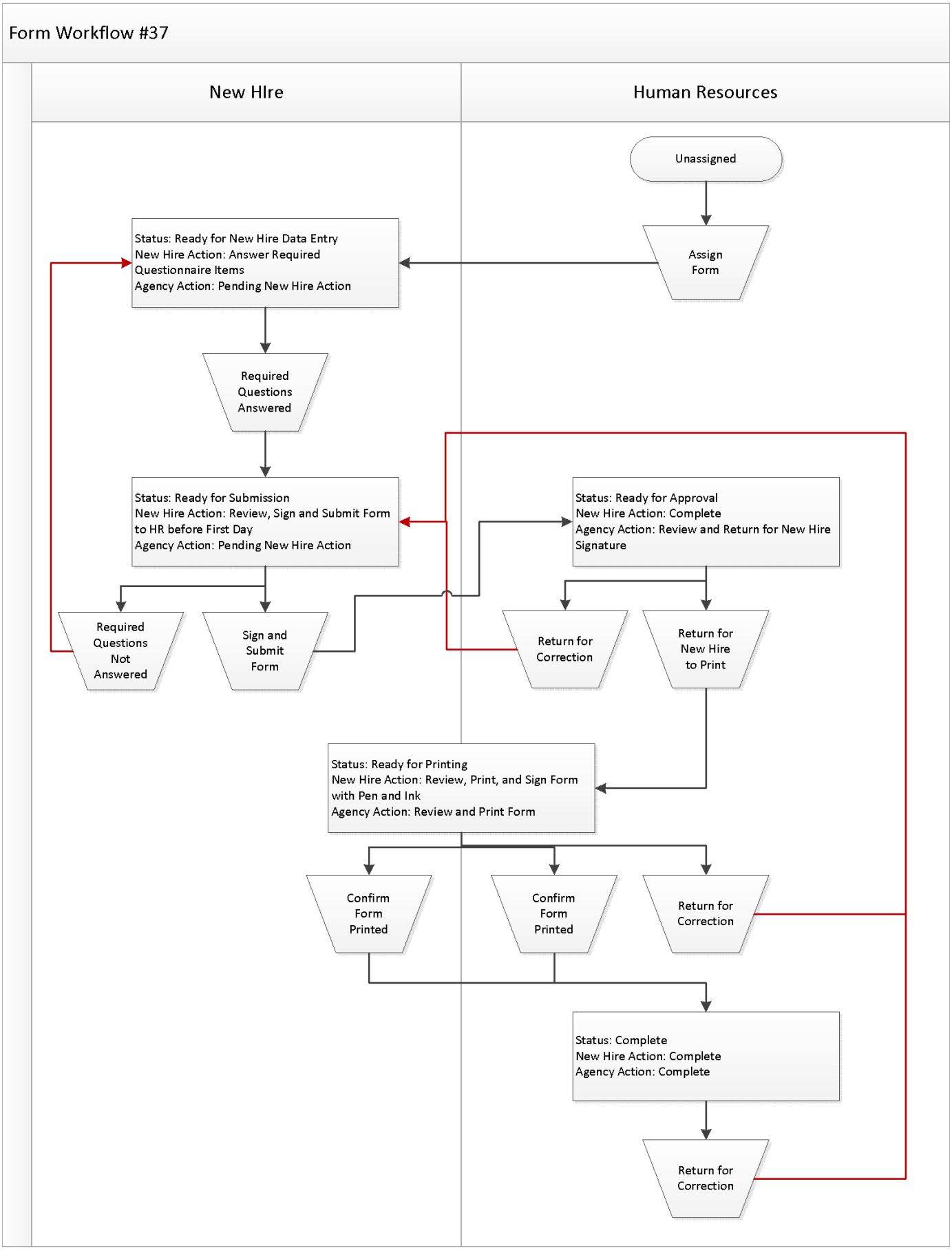

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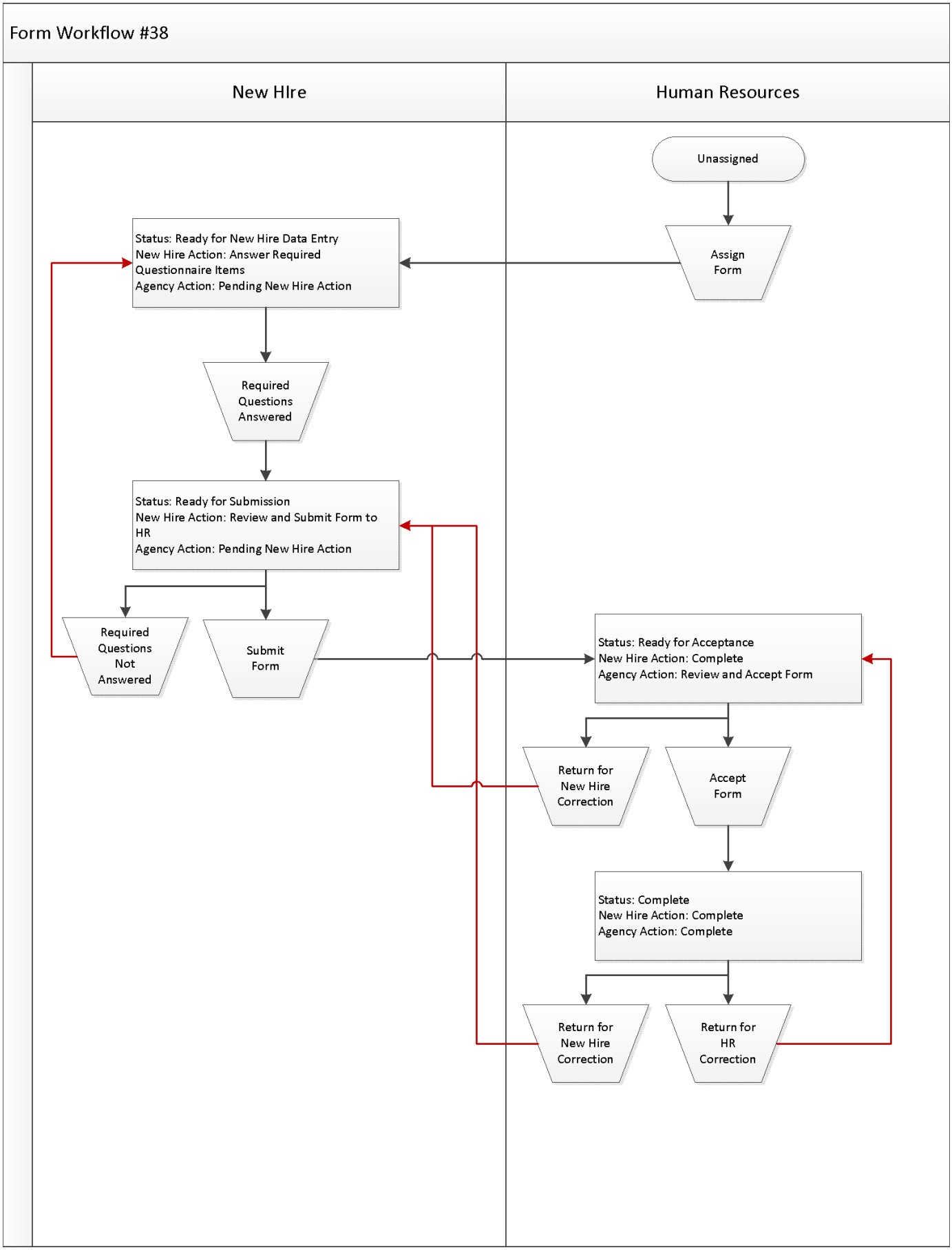

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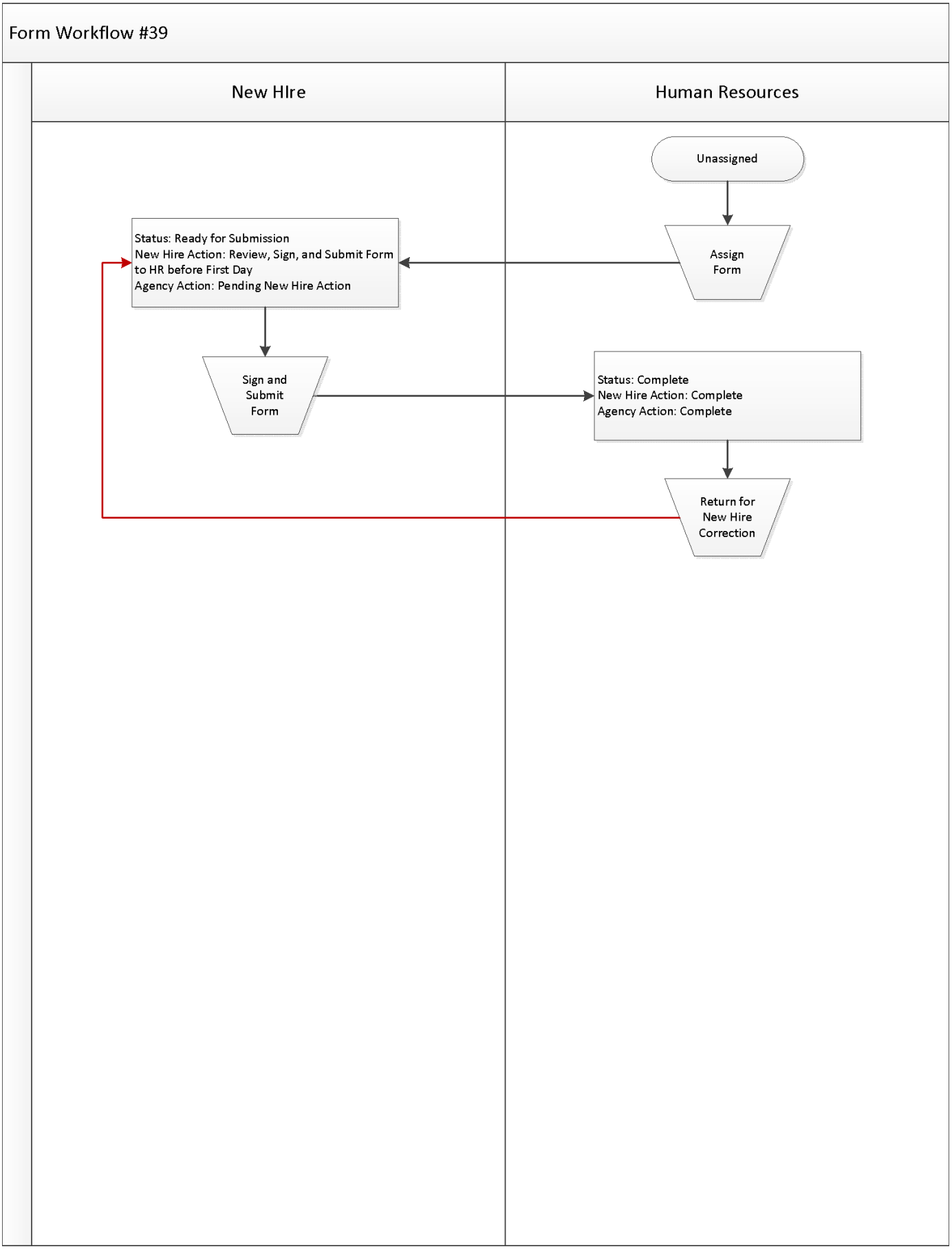

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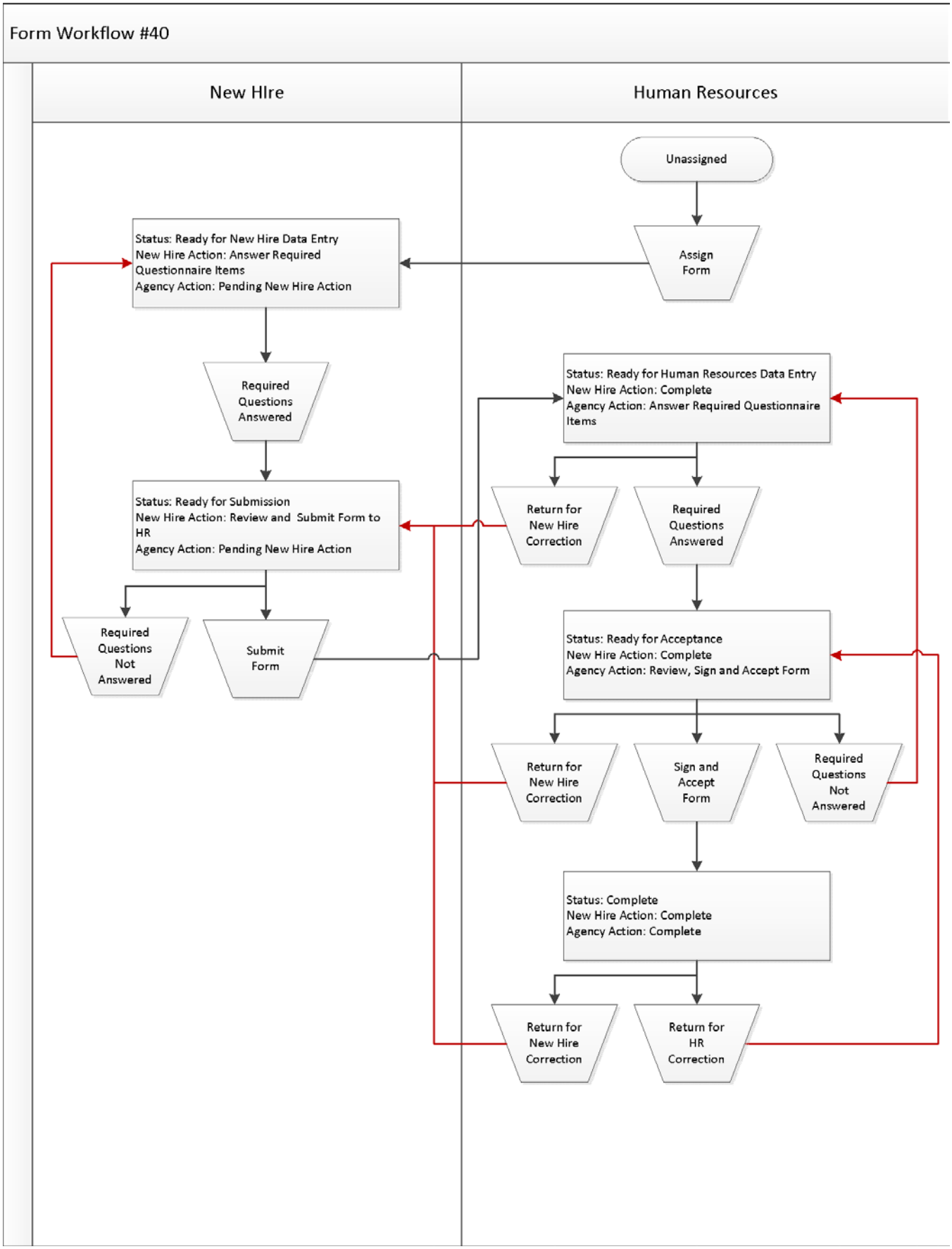

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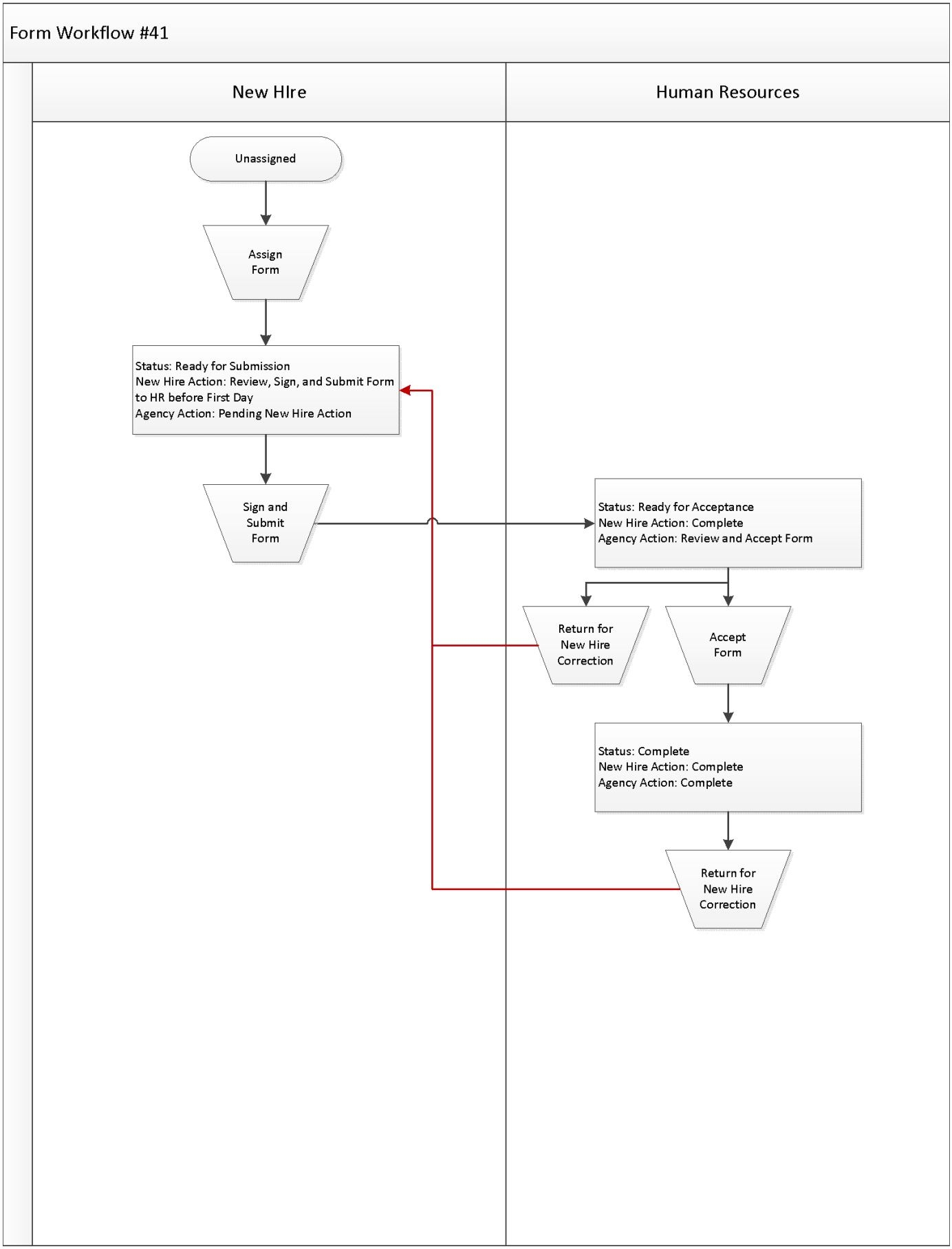

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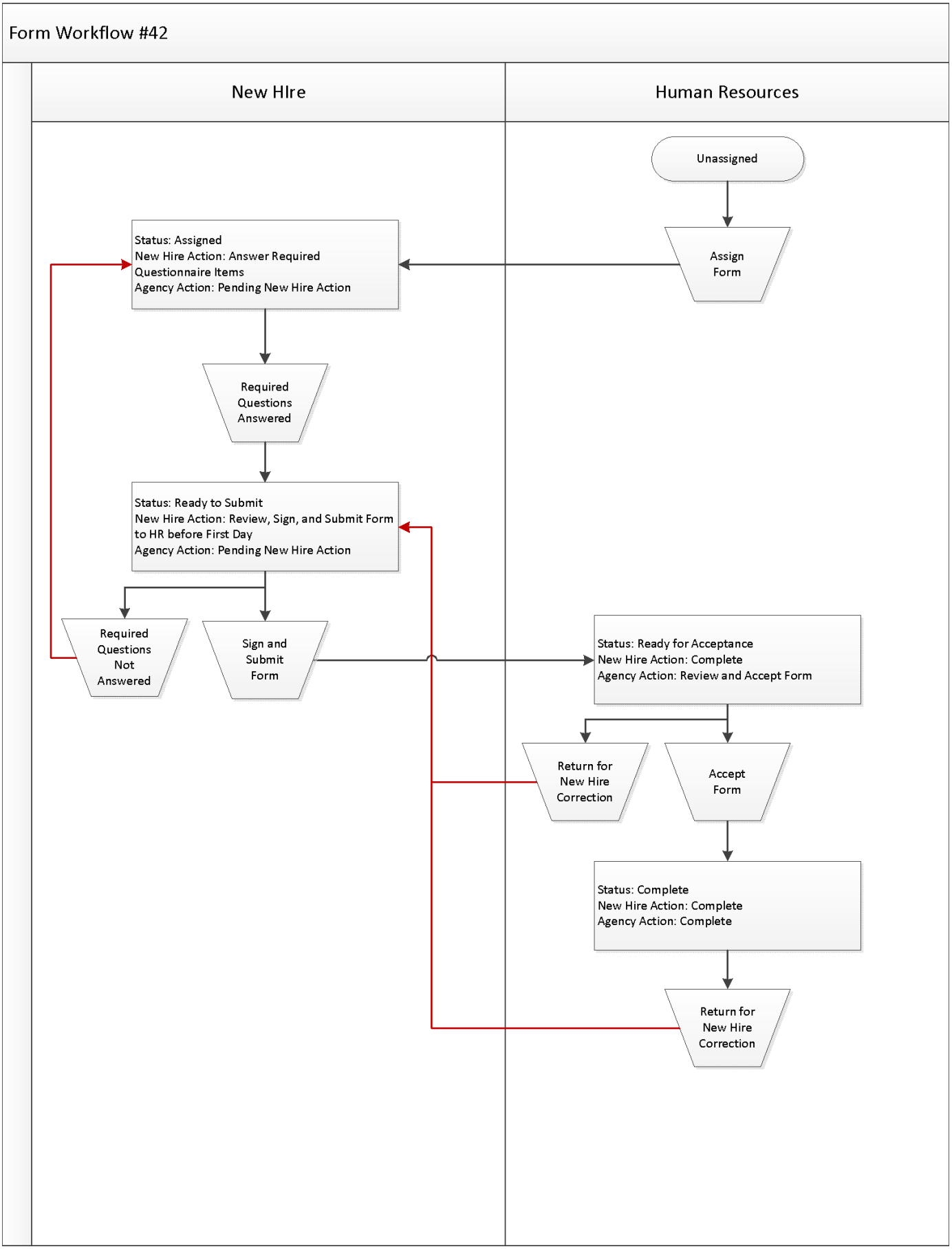

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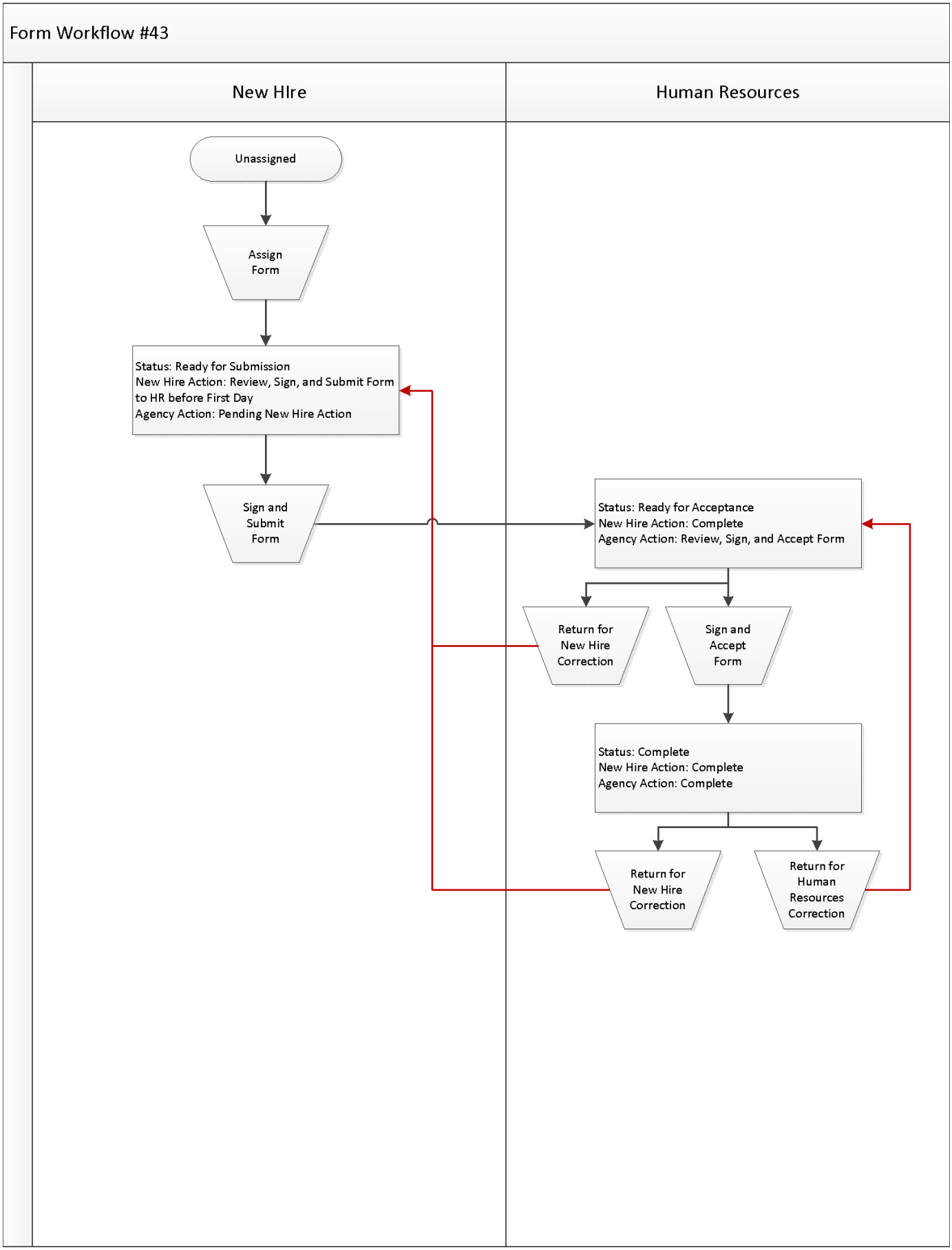

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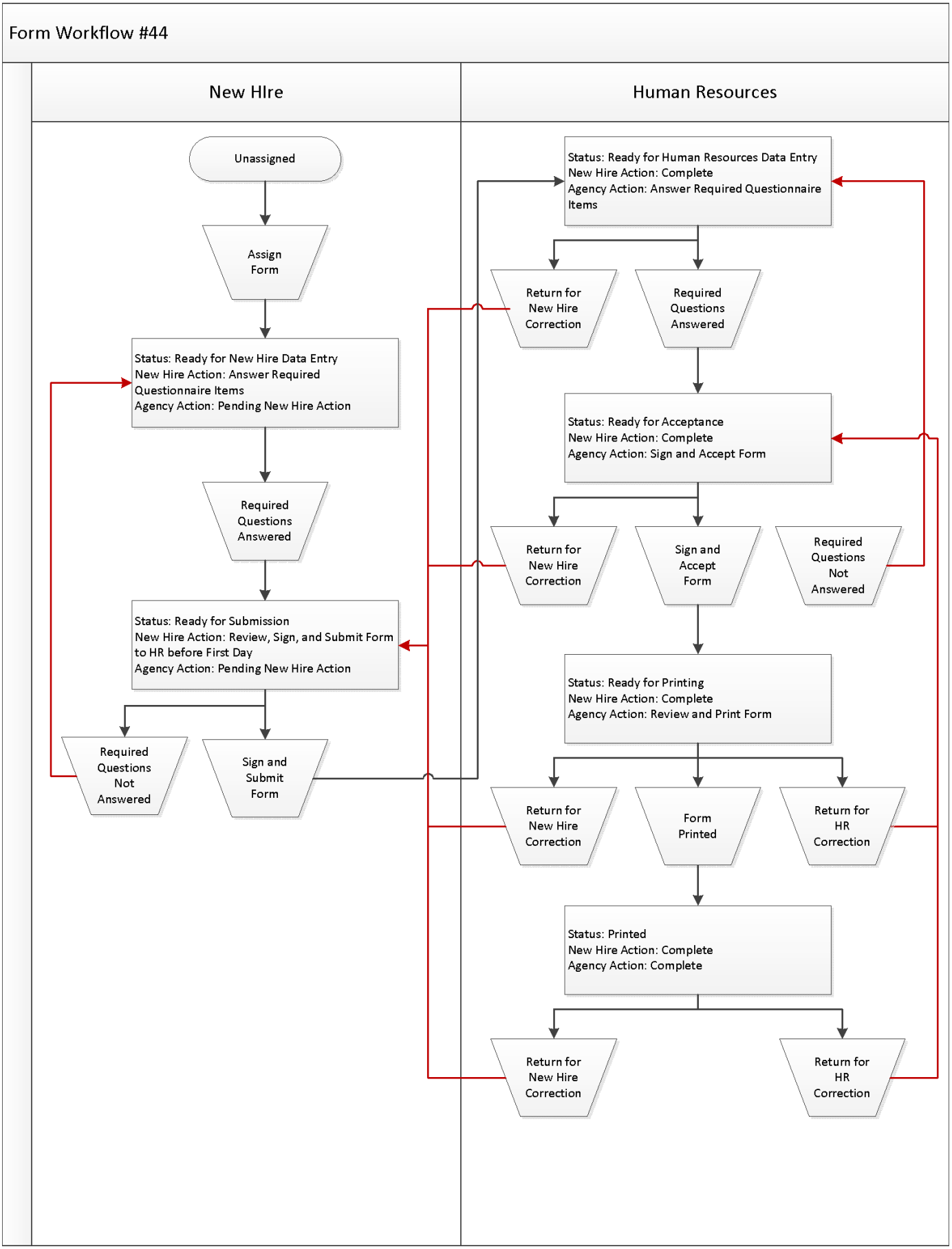

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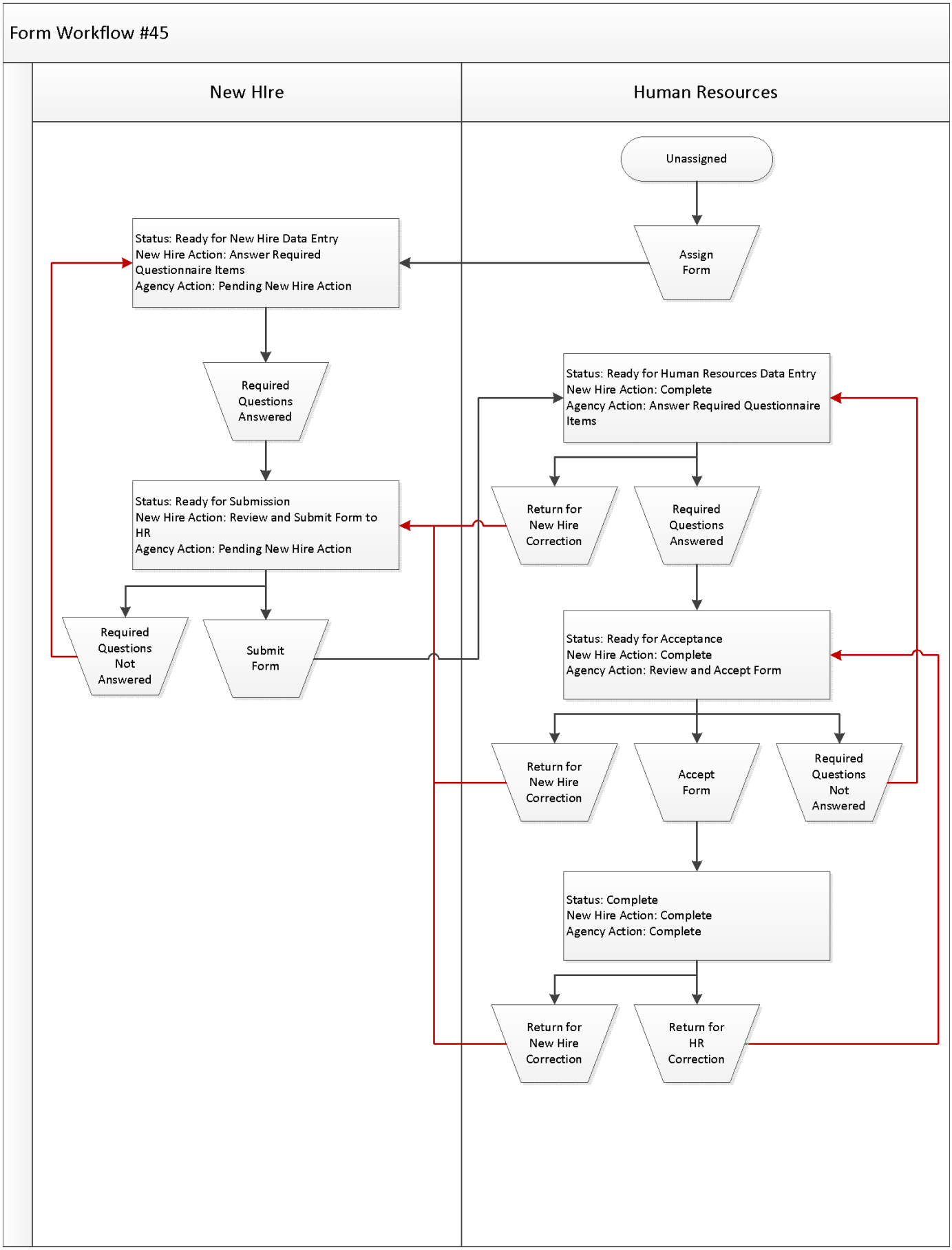

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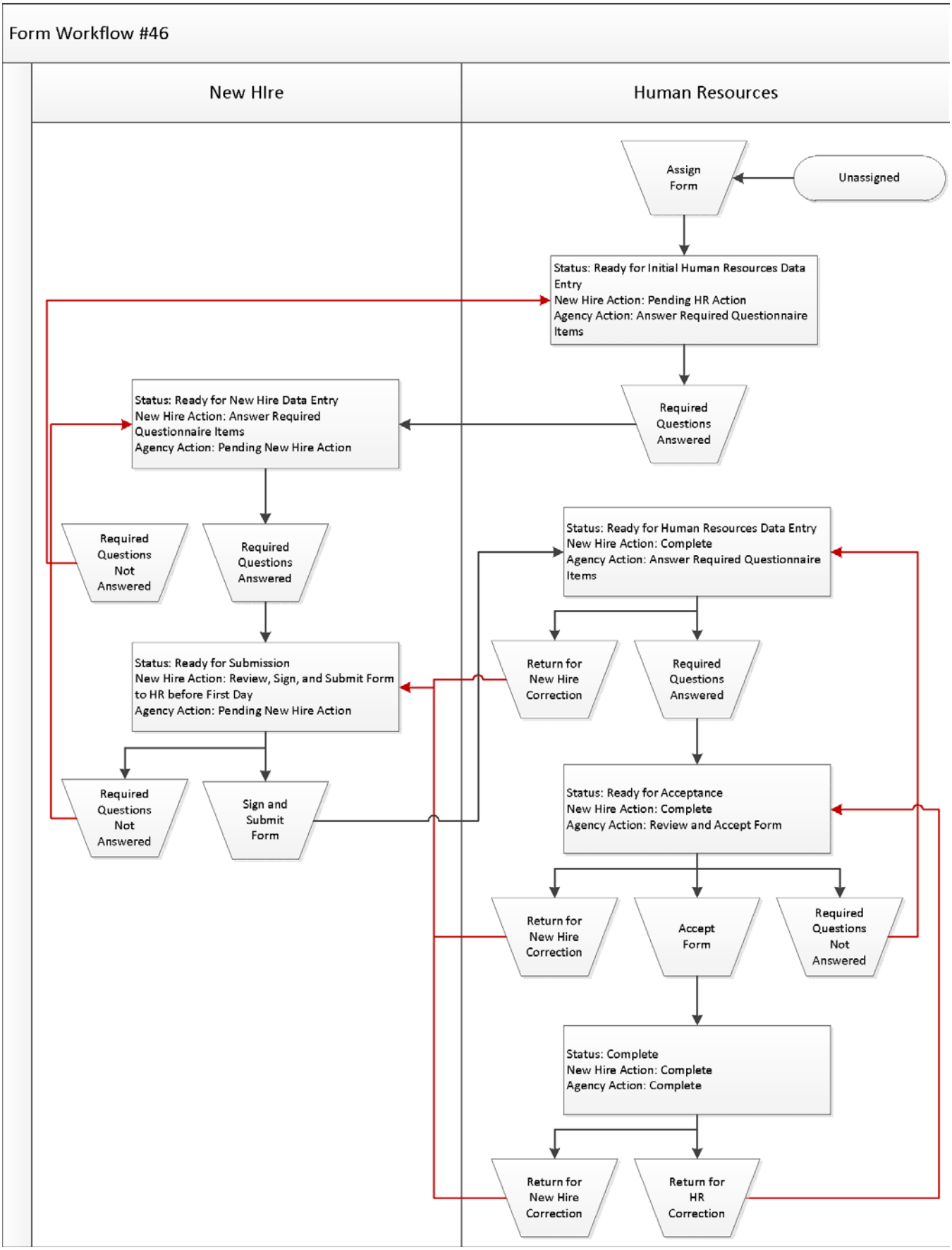

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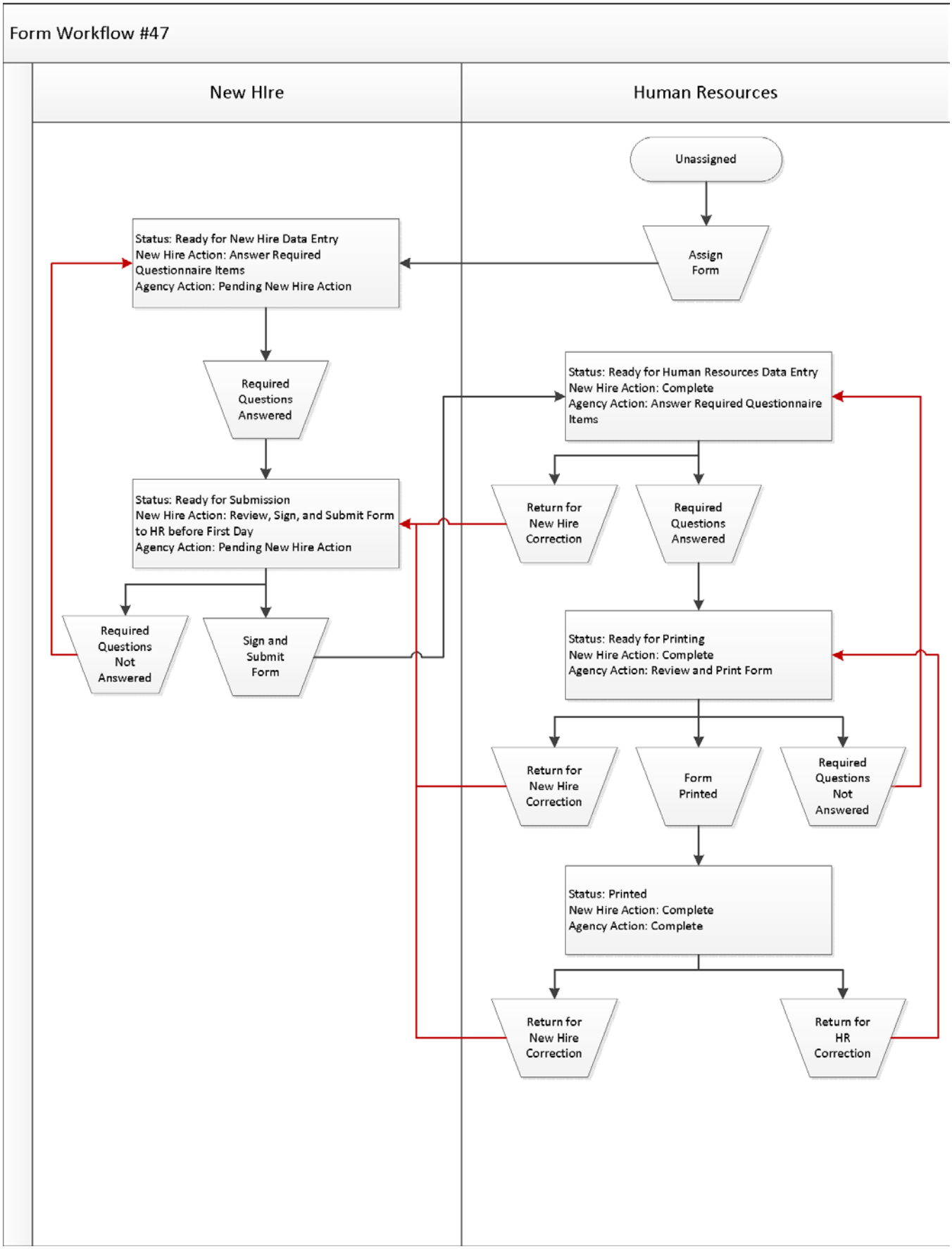
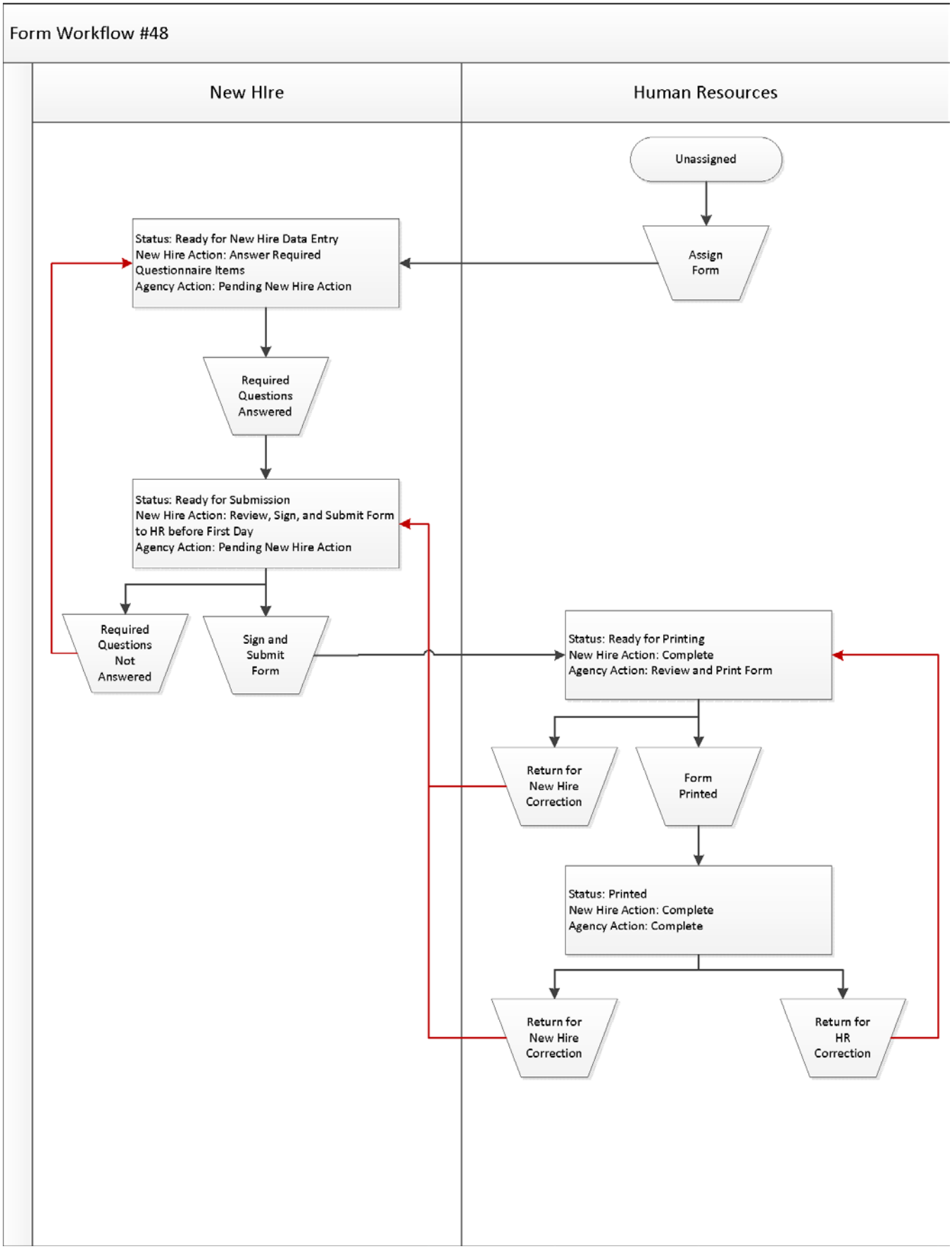
Form Workflow #48