New Hires Training Exercise 1: Creating a New Hire Record from a Certificate

Now that you have completed the online portion of training for the New Hires area, it is time to log into the Stage environment of USA Staffing to practice what you have learned. Use this step-by-step guide to help you practice this lesson. Retain your notes to assist you with other lessons.

This practice exercise will walk you through auditing a selection from a certificate to create a new hire record (if you do not have access to audit certificates, start with Exercise 2).   Creating a new hire record from a certificate requires you to access a certificate that is ready to be audited. If you have a certificate that is ready, complete the steps below. If not, you can access the entire practice training series on the USA Staffing Training Resources page at: https://help.usastaffing.gov/ResourceCenter/index.php/USA_Staffing_Training_Resources . You will then need to complete the Request, Vacancy, Assessment, Announcement and Referral exercises before proceeding with this exercise.

My Request Number: _____

My Vacancy Number: _____

My Certificate Number: _____

Before you begin this exercise:

- Your Office Administrator will need to create onboarding tasks & workflows that you can assign to the new hire record.
- Your Office Administrator will need to create a Tentative Job Offer notification template that you can send to the new hire.
- Be sure you have access to the e-mail account and USAJOBS/login.gov account for the new hire selected from the certificate.

1. Go into your Vacancy. There are several ways to access a Vacancy:
   a. If you know your vacancy number, you can type it directly in the **Go To** box at the top of the page and click **Enter**.
   b. You can locate your request in the Requests tab of your dashboard. Once in your request, there is a direct access link under the **Vacancy Created** section.
   c. If you have recently gone into this Vacancy it will also display in your dashboard drop-down list.

2. Once in your Vacancy, navigate to the Certificates tab and click on the **Certificate Number**.
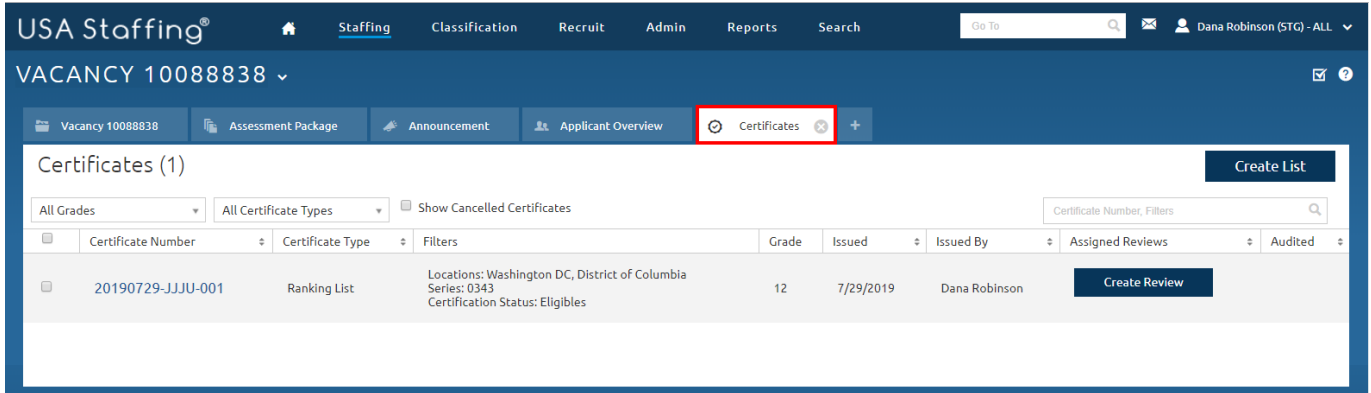

Image 1: Vacancy page with the Certificates tab highlighted.

3. Once the certificate is open, click the **Edit** icon next to the selected applicant's name to audit the applicant record.
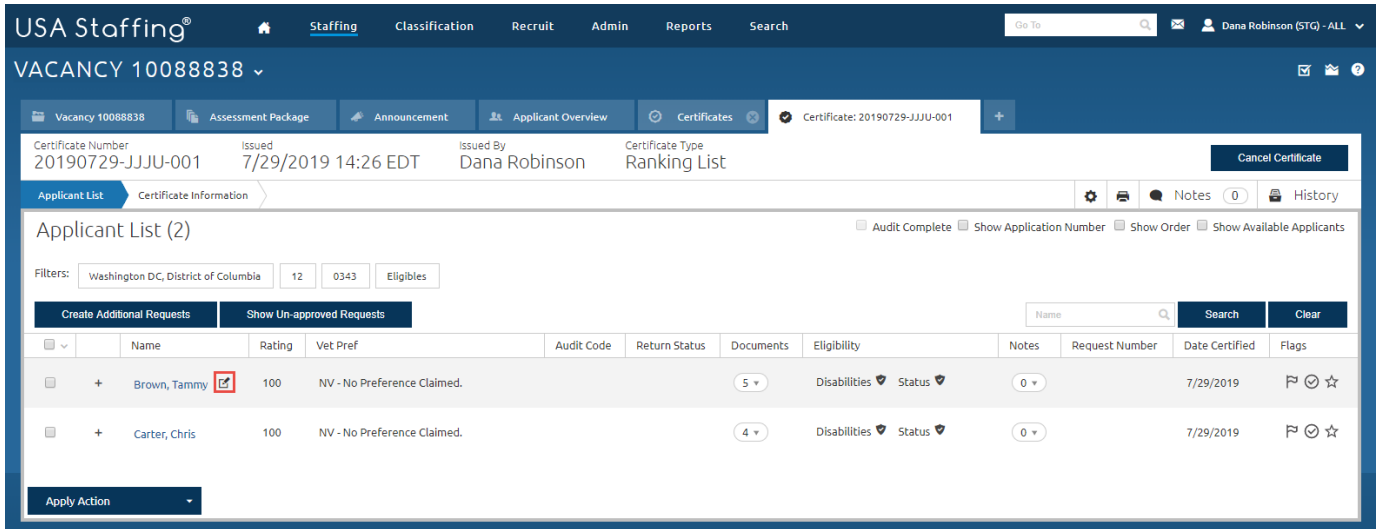

Image 2: Certificate page with the Applicant List displaying.

4. On the Audit Application page, choose **Selected** for the Audit Code, select **Hired** for the Return Status, then select the Customer and Request Number as well as the Location, Workflow, Position Description Number and Series (if these fields are not populated) and click **Save and Close**. (**Note**: If this certificate was returned by the hiring manager, some of these fields will already be populated).
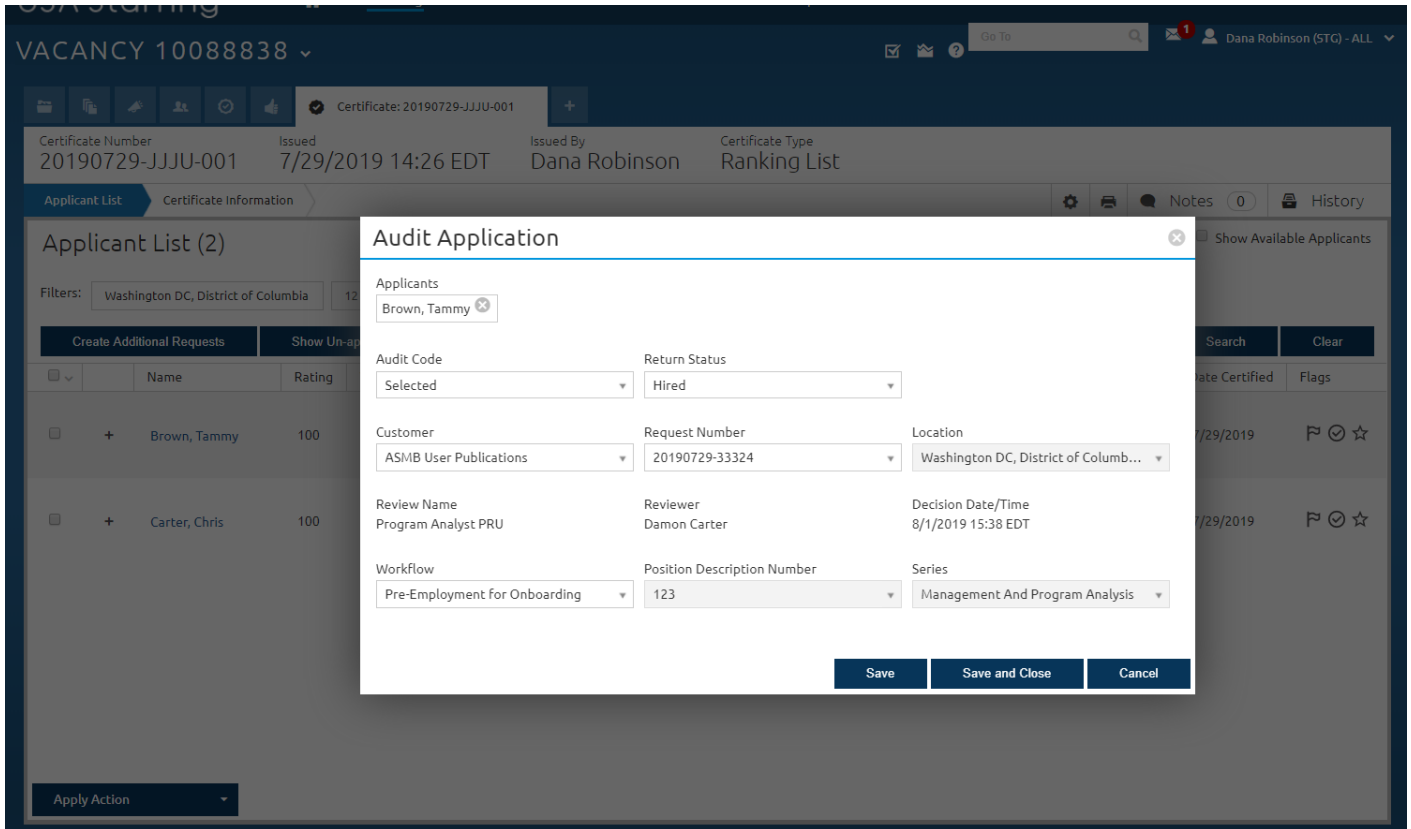

Image 3: Applicant List page with the Audit Application pop-up open.

5. After clicking **Save and Close**, the Save Audit Create New Hire Process page will display to indicate the new hire record is being created. After this process completes, you will be returned back to the certificate.
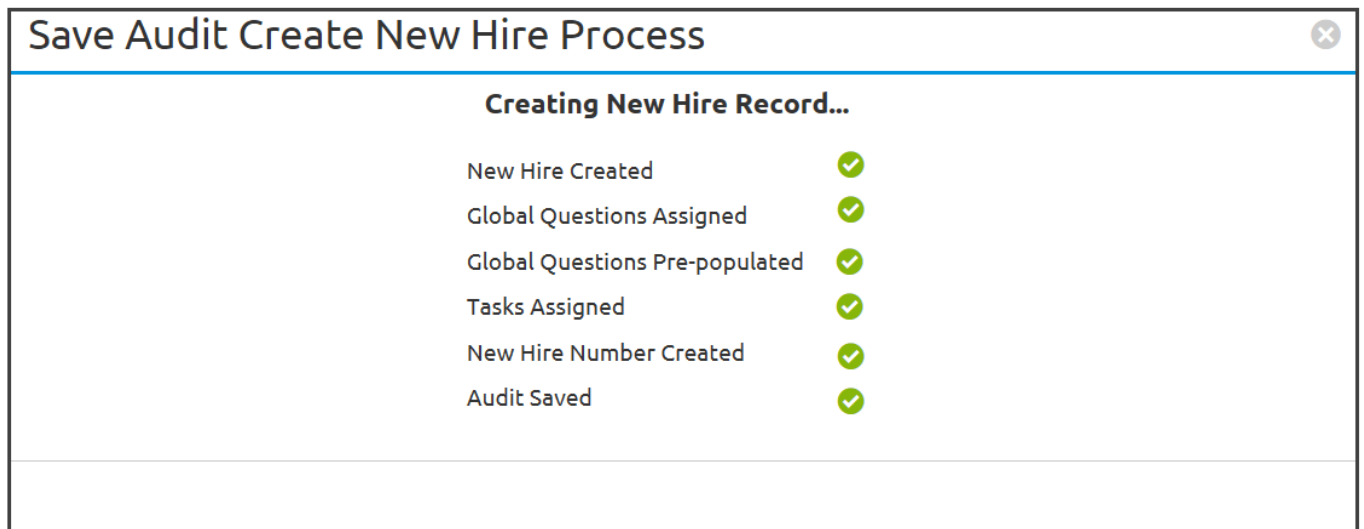

Image 4: The Save Audit Create New Hire Process page.

6. Expand the view for the selected applicant on the certificate by clicking on the plus sign next to the name, then click the **Onboarding** tab. Click the **View New Hire** record button to be directed to the new hire record.

Image 5: Certificate tab with the Applicant List page open with an expanded view of the selected applicant record.

7. After clicking the **View New Hire** button, you will be directed to the Assignments page of the record. However, you will need to navigate to the Overview page first, in order to assign staff as the Onboarding Process Owner, HR Contacts, Benefits Contacts, and Payroll Contacts (if not already assigned). These are the users who will manage the record.

Note: If contacts are already assigned to the record, this means your agency has established automatic defaults for the **Contact Information** area. You can add additional contact names or remove these names as necessary.
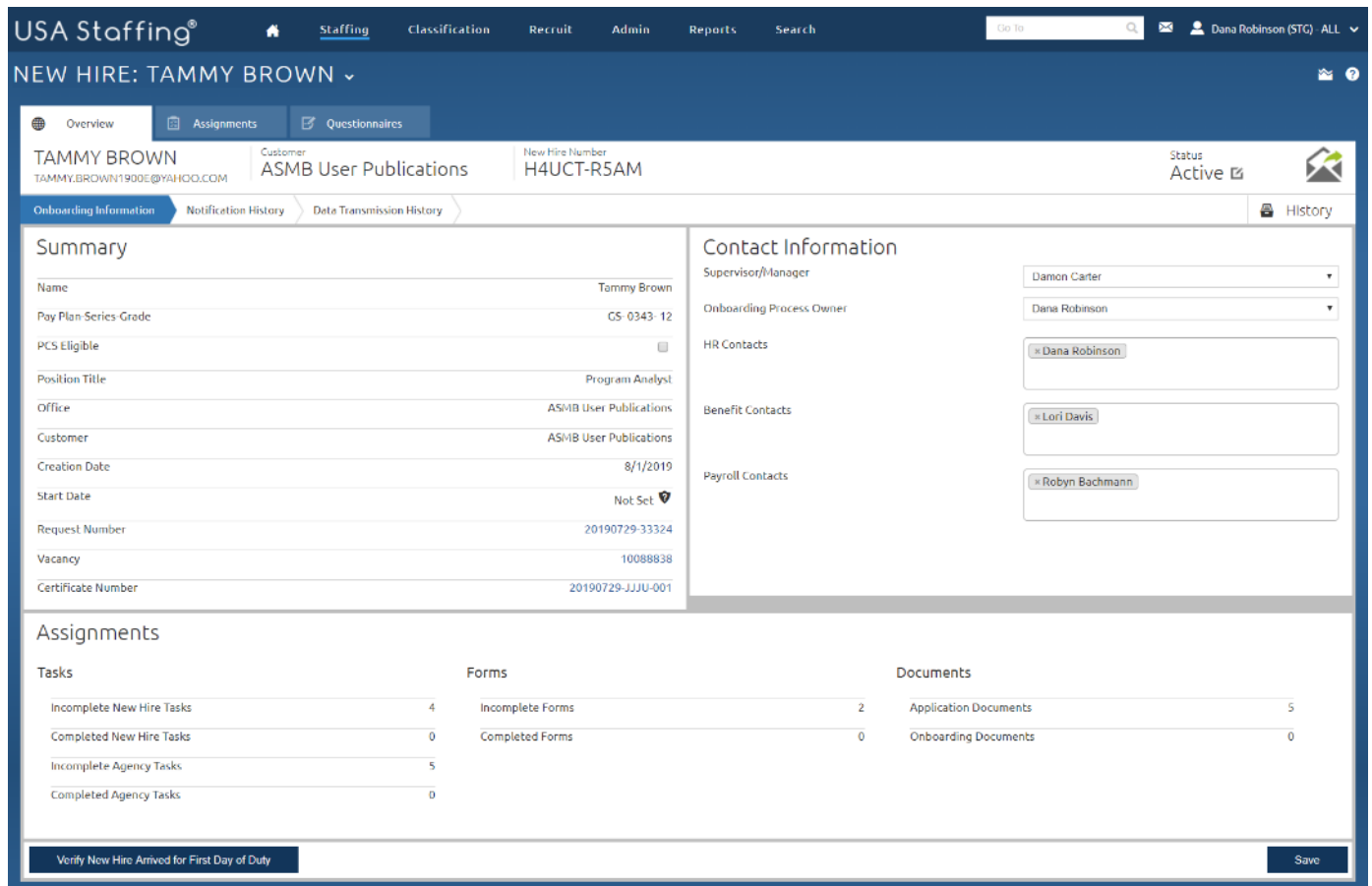

Image 6: Overview page displaying the Contact Information area to assign staff to the record.

8. After assigning contacts to the record, go to the Assignments page where you can begin managing the tasks for the record. Tasks should automatically be assigned to this record based on the workflow selected when the record was audited from the certificate in Step 4. Review the assigned Human Resources tasks and use the **Add Workflow** and/or **Add Task** button to add additional tasks if necessary. Remember, workflows are a group of tasks that can be assigned to the record at one time and these tasks have pre-established due dates for reporting purposes.
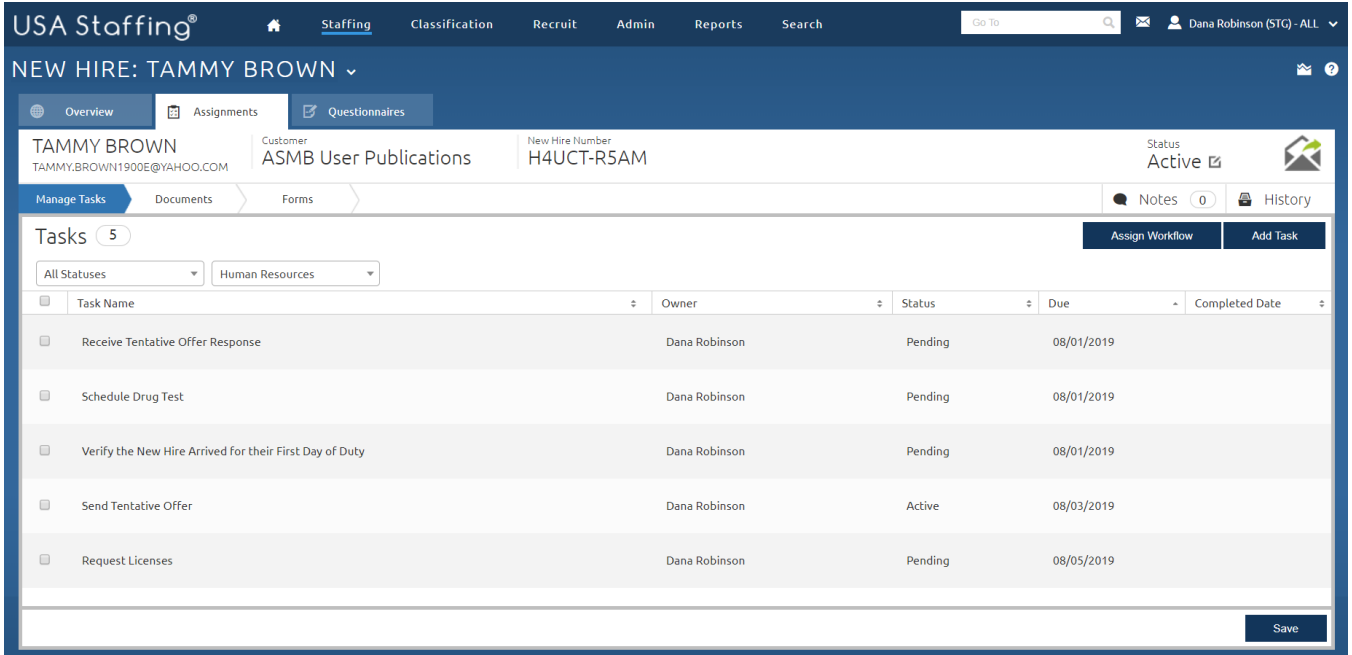
Image 7: A new hire's record is on the Assignments tab with the Manage Tasks page displaying.

9. Filter the Manage Tasks page to display the **New Hire** tasks. Tasks should automatically be assigned to this record based on the workflow selected when the record was audited from the certificate in Step 4. Review the tasks assigned to the new hire then click the **Add Task** button.
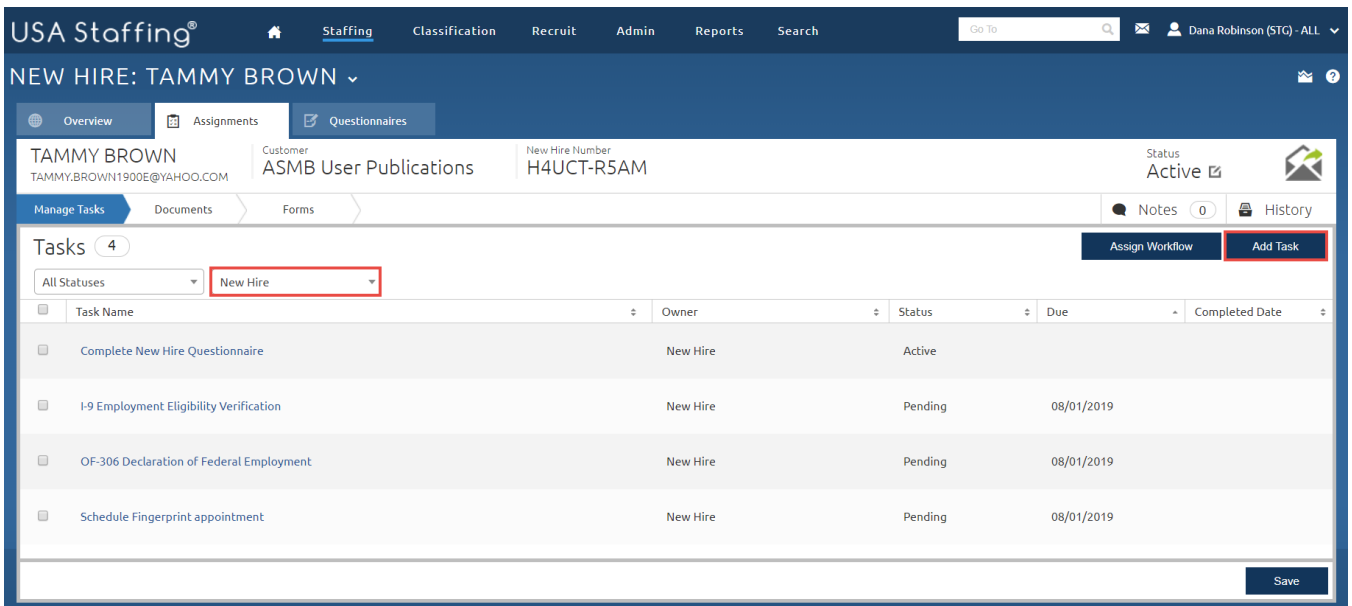
Image 8: A new hire's record is on the Assignments tab with the Manage Tasks page filtered by the New Hire tasks.

10. Select the Federal tax form and click the **Add Task** button on the pop-up (if you do not have any tax form tasks to choose from, select another task to assign to the record).

Image 9: A new hire's record is on the Manage Tasks page displaying the Assign Tasks pop-up.

11. The new task is now assigned to the record. Enter a **Due** date for the new task, and assign a **Due** date for the **Complete New Hire Questionnaire** task and **Save**.
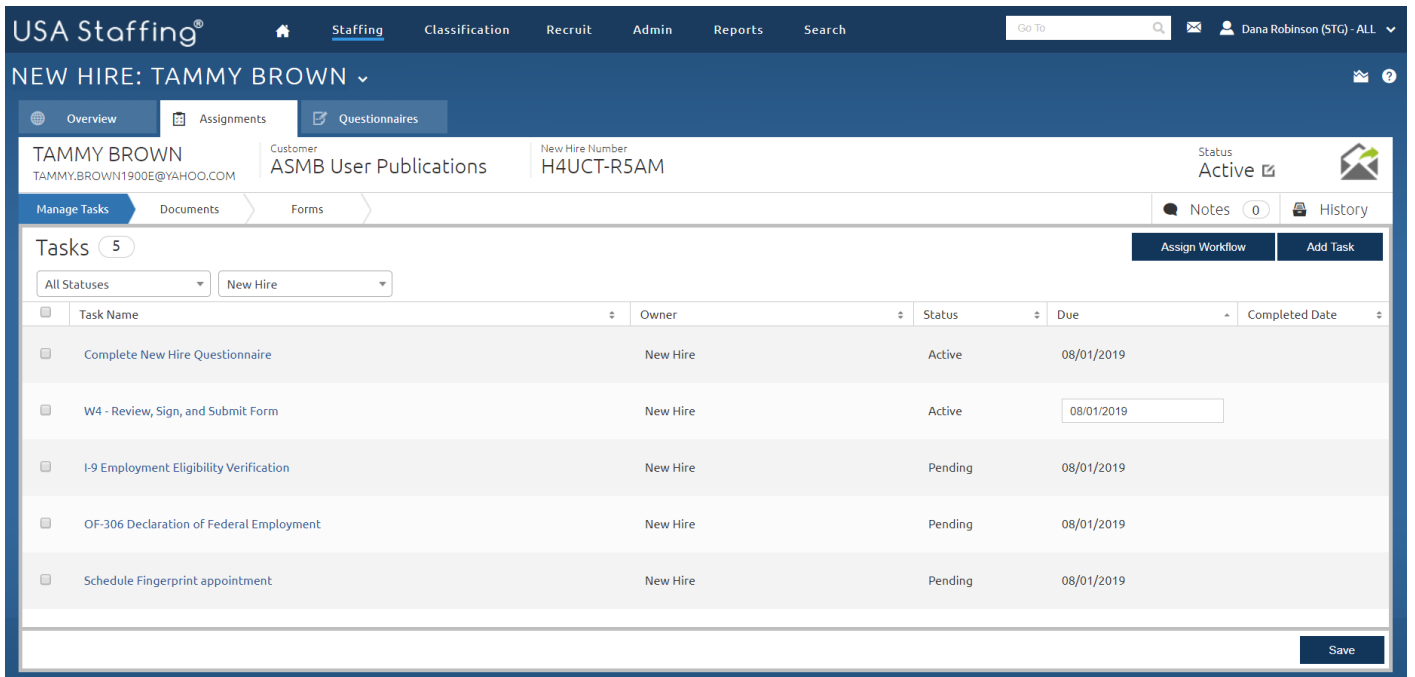
Image 10: A new hire's record is on the Manage Tasks page displaying a new task that was assigned.

12. Now that tasks are assigned to the record, you are ready to send the tentative job offer to the new hire. Click the **Envelope** icon to initiate sending the job offer notification.
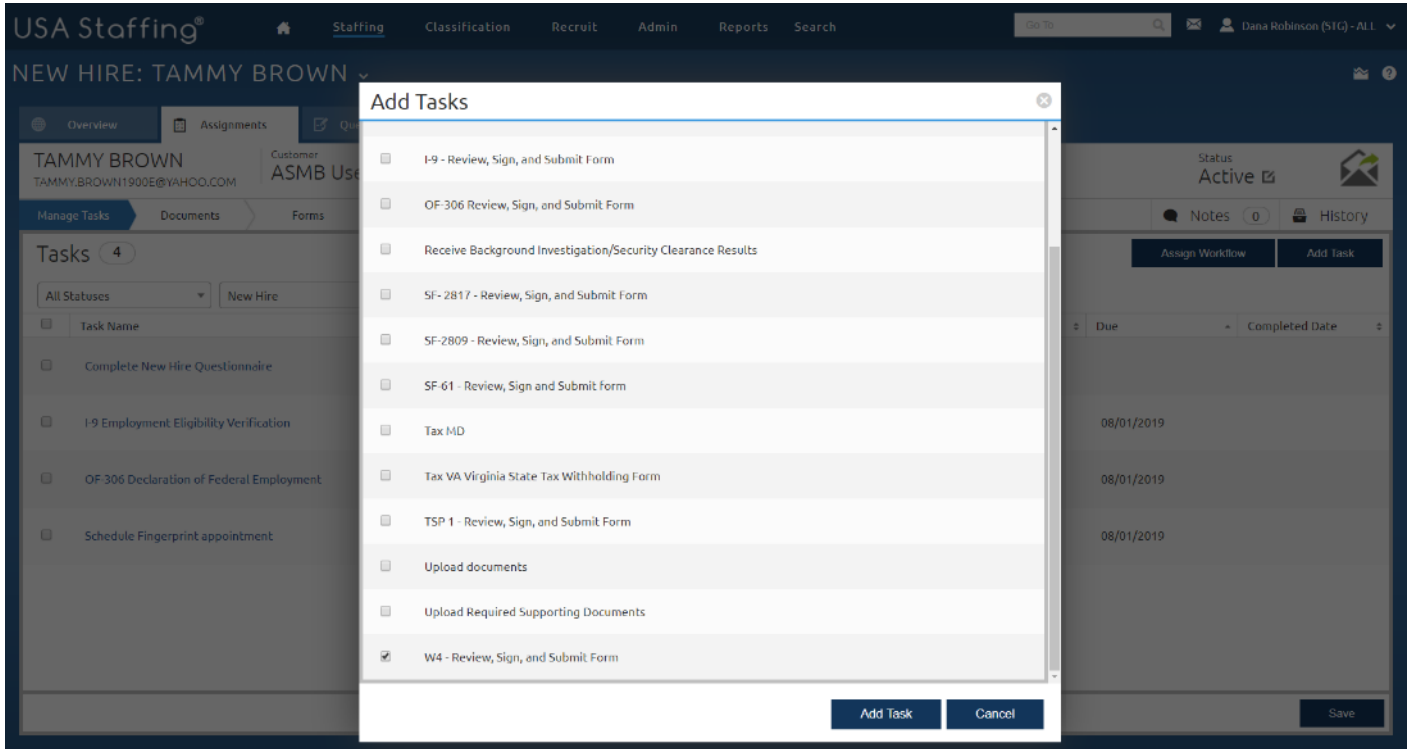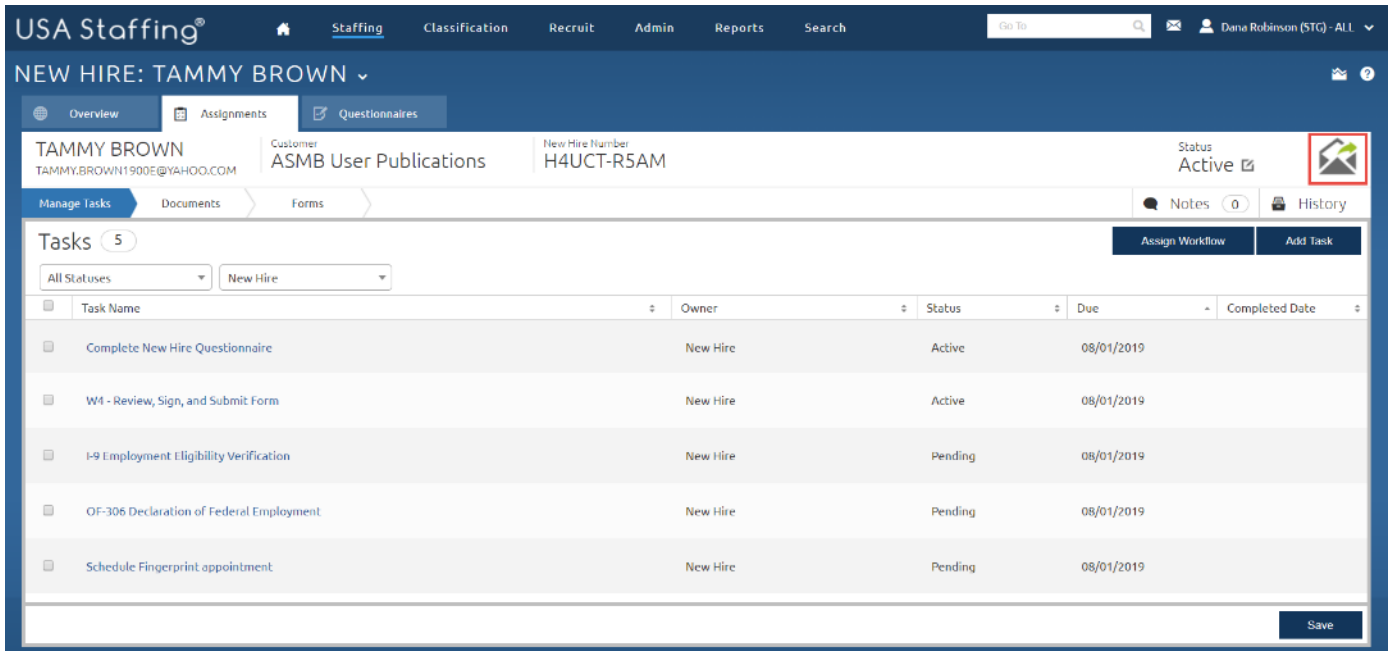

Image 11: A new hire's record is on the Manage Tasks page highlighting the Envelope icon.

13. Select the **Type** of notification that is a **Tentative Offer** (if you do not have a tentative offer notification to select from, inform your Office Administrator that the notification template(s) needs to be created).
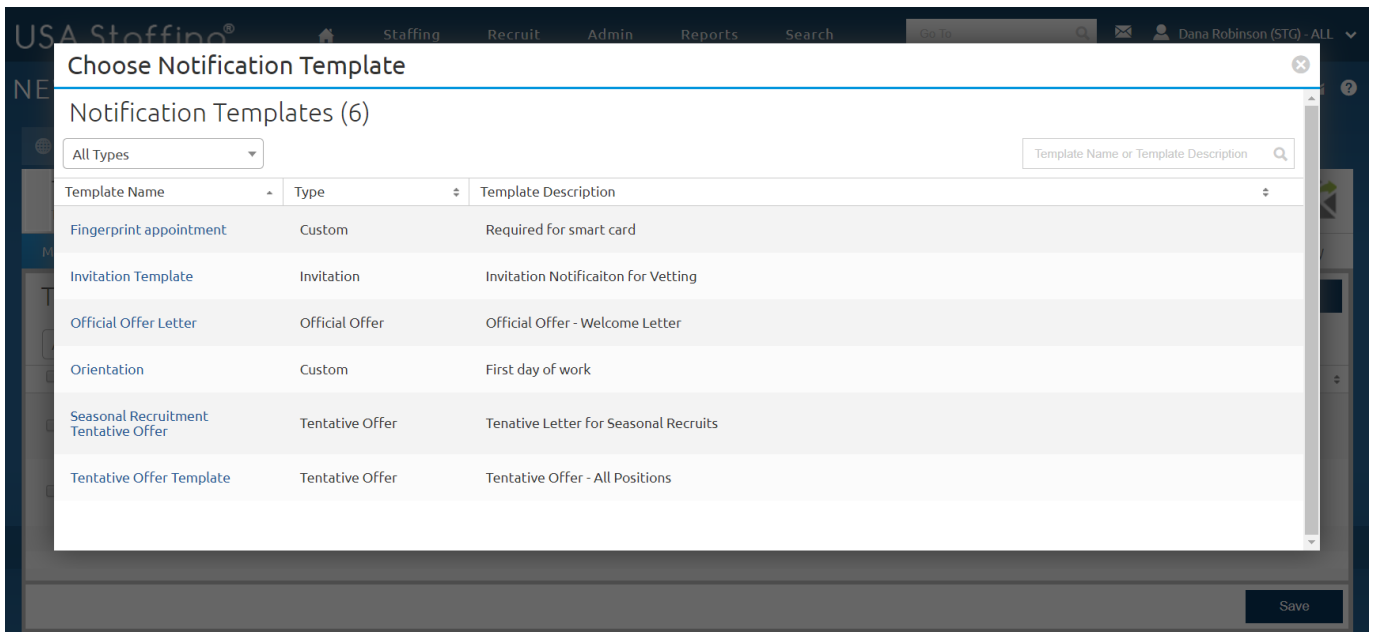
Image 12: Choose Notification Template page.

14. Click the **Send Notification** button from the Preview Notification page.

Note: You can click the **Add Attachment** button to add documents before sending. And, you can click **Edit Notification** if you need to modify the text, remove placeholder text, or make other changes before sending the notification.
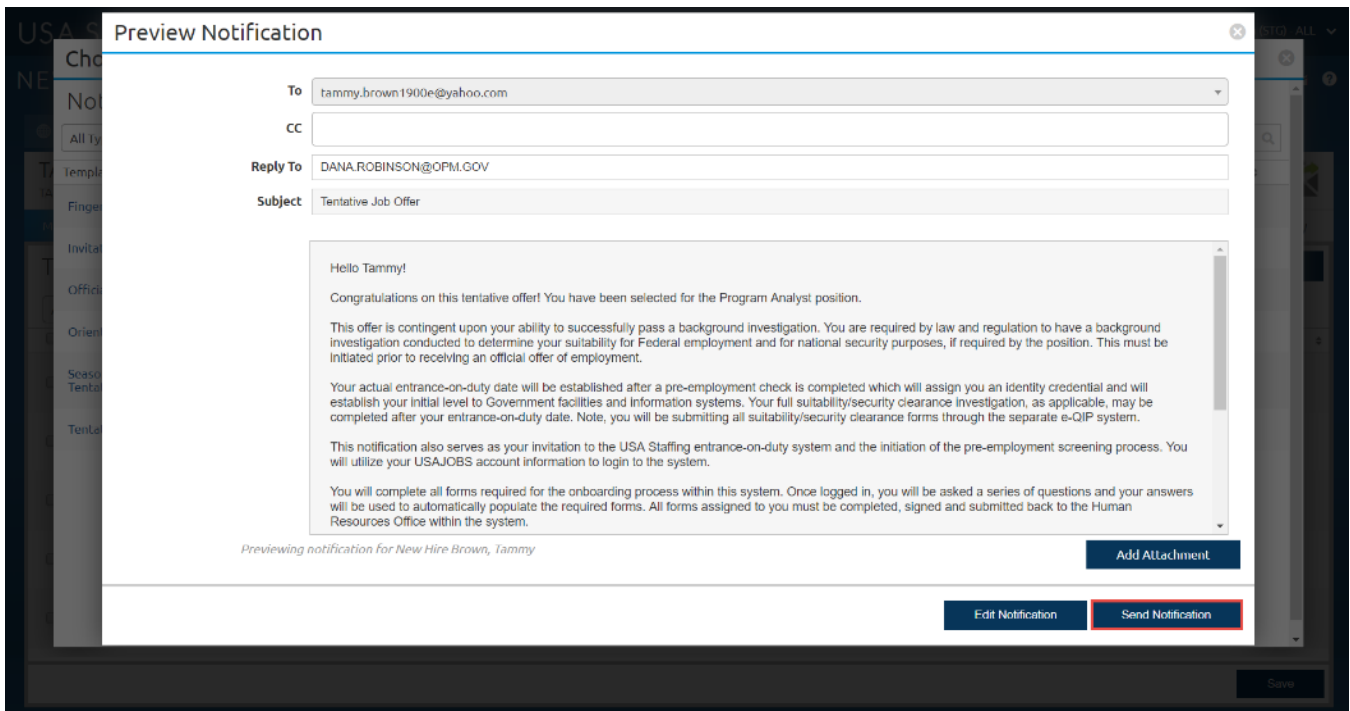
Image 13: The Preview Notification page for the Tentative Offer E-mail.

15. After sending the notification, navigate to the Overview tab and click on the Notification History page. This page will list the notification(s) that have been sent to the new hire.

Image 14: The Notification History page displaying the list of sent notifications.

16. Click the **HTML** or **PDF** link under the **View Content** column to view the contents of the notification you just sent.

New Hire Notification

To:	tammy.brown1900e@yahoo.com
CC:	
From:	usastaffingoffice@opm.gov (on behalf of Dana Robinson)
Sent:	8/1/2019 16:52 EDT
Subject:	Tentative Job Offer

Hello Tammy!

Congratulations on this tentative offer! You have been selected for the Program Analyst position.

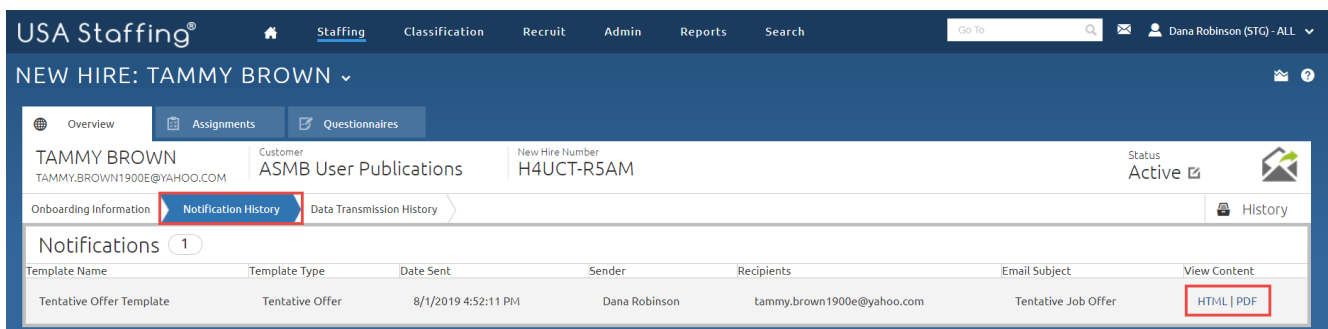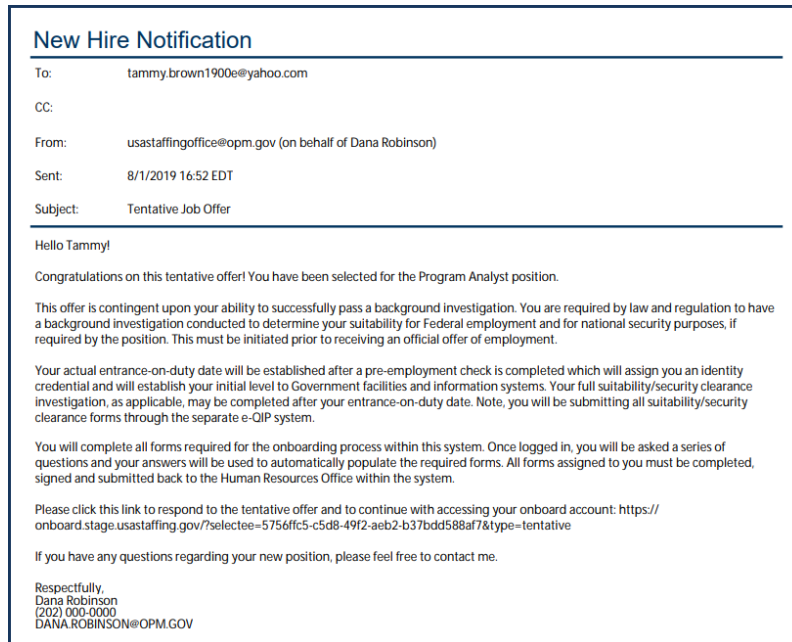This offer is contingent upon your ability to successfully pass a background investigation. You are required by law and regulation to have a background investigation conducted to determine your suitability for Federal employment and for national security purposes, if required by the position. This must be initiated prior to receiving an official offer of employment.

Your actual entrance-on-duty date will be established after a pre-employment check is completed which will assign you an identity credential and will establish your initial level to Government facilities and information systems. Your full suitability/security clearance investigation, as applicable, may be completed after your entrance-on-duty date. Note, you will be submitting all suitability/security clearance forms through the separate e-QIP system.

You will complete all forms required for the onboarding process within this system. Once logged in, you will be asked a series of questions and your answers will be used to automatically populate the required forms. All forms assigned to you must be completed, signed and submitted back to the Human Resources Office within the system.

Please click this link to respond to the tentative offer and to continue with accessing your onboard account: https://onboard.stage.usastaffing.gov/?selectee=5756ffc5-c5d8-49f2-aeb2-b37bdd588af7&type=tentative

If you have any questions regarding your new position, please feel free to contact me.

Respectfully,
Dana Robinson
(202) 000-0000
DANA.ROBINSON@OPM.GOV

Image 15: Copy of the sent tentative job offer notification.

17. Now that you have a created a new hire record, assigned a workflow & tasks, and sent the tentative offer to the new hire through the onboarding system, let's take a look at the online help.

18. Click the **Help** icon and select **Review Online Help**. The online help will open in a separate tab.
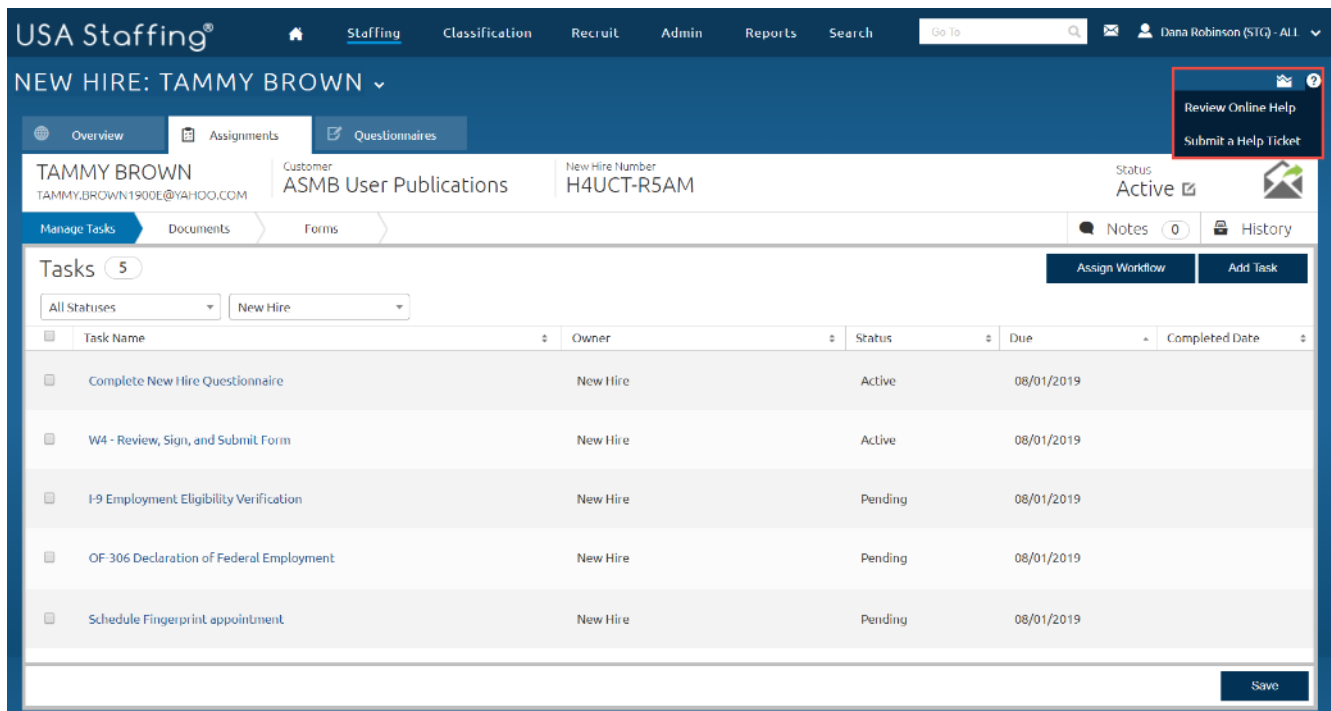

Image 16: A new hire's record displaying the Manage Tasks page with the Help button highlighted. This button is located in the upper right quadrant of the page.

19. Click the **Home** button on online help. Next click the following: **Help for USA Staffing HR Users > Help by Page >** scroll down and click **New Hires**. The **Help by Page** option explains each field on the page.
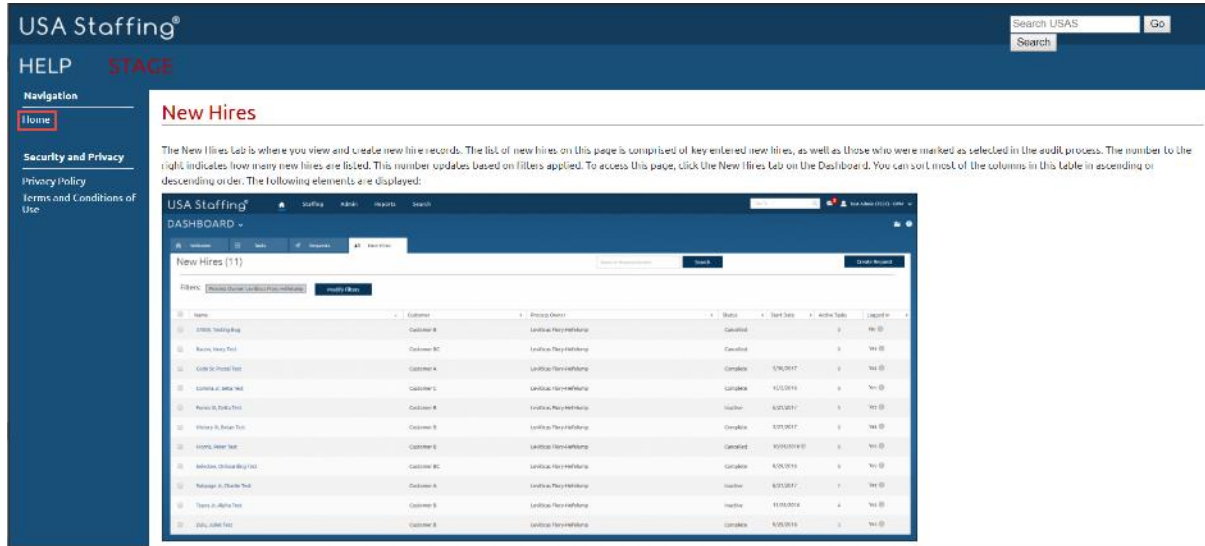

Image 17: Online Help page with the Home button highlighted. The Home button is in the upper left quadrant of the page.

20. Click the **Help by Task** link. Select the **New Hires Tasks** link under New Hires. The **Help by Tasks** option provides step-by-step instructions on how to perform an action.
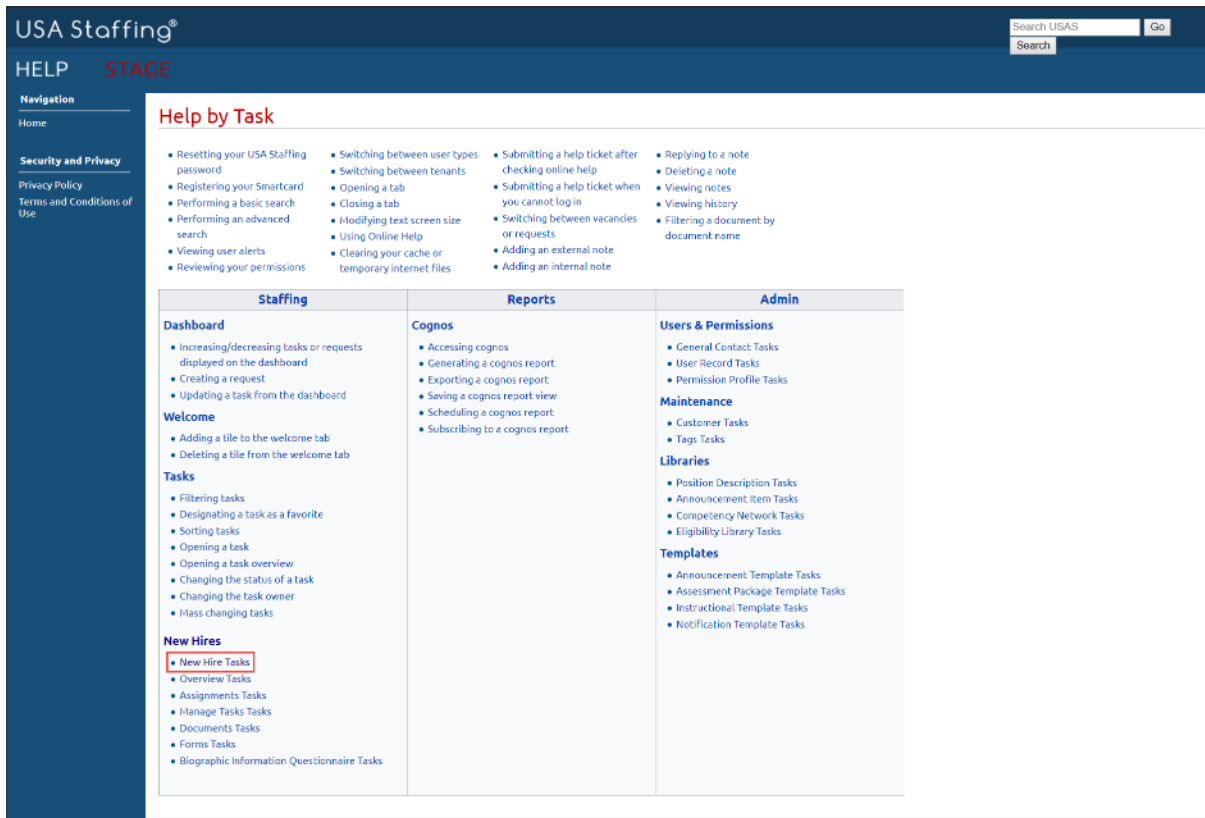

Image 18: Online Help by Task page. New Hires Tasks highlighted to show the variety of options available in online help.

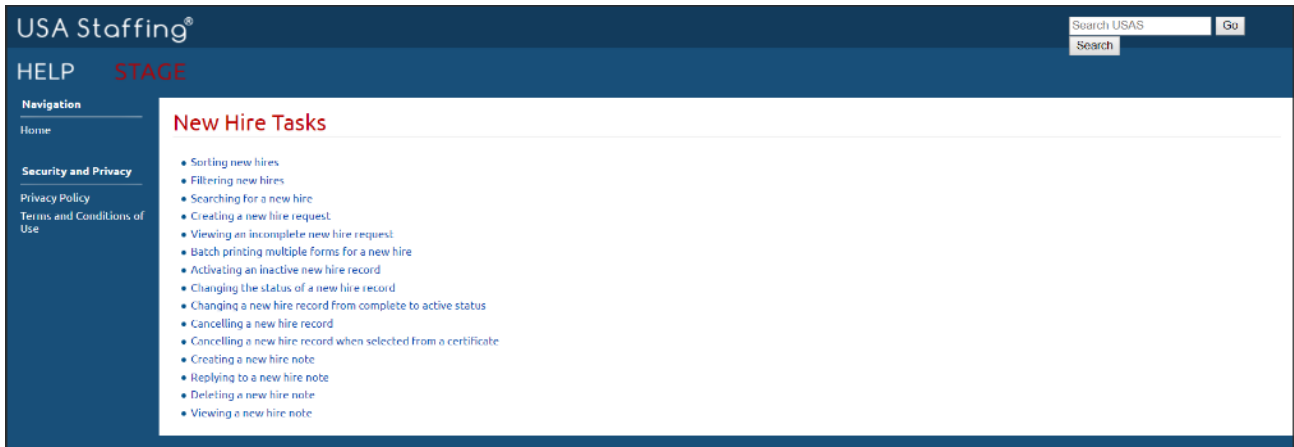21. Review any desired New Hires task by clicking on the link.

Image 19: Online Help by Task page showing a variety of options available specifically for New Hire Tasks.

22. You can either close the online help tab or return to the New Hires Dashboard on your browser.
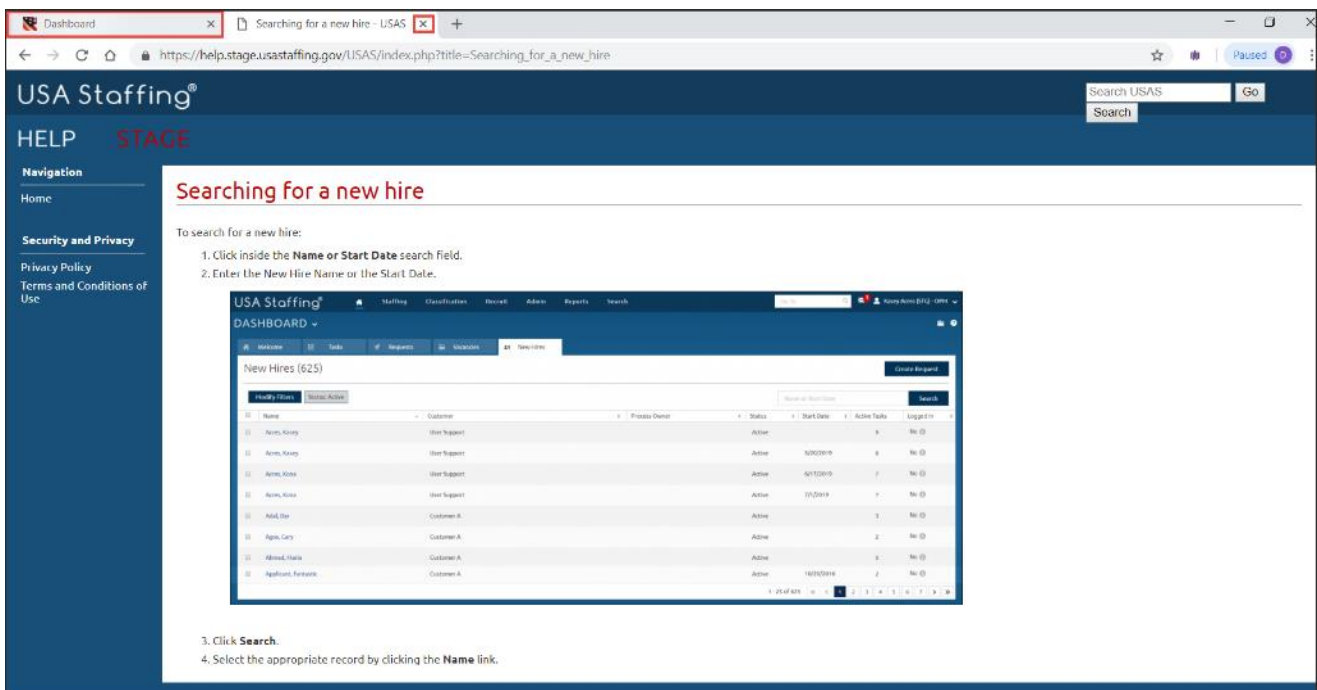

Image 20: Online help page with the navigation bar at the top of the browser highlighted. Since online help opened in a new tab, you can return to USA Staffing by clicking the highlighted tab. You can close the online help by clicking on the highlighted X on the help tab.

This concludes the lesson on Creating a New Hire Record from a Certificate.

Notes for New Hire

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