USA Staffing

Quick Reference Guide: Creating Tasks & Workflows

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Overview

This document provides an overview of tasks and workflows, including step by step instructions on how to create them and an explanation of how they work together within USA Staffing. This document also provides sample workflows designed around specific staffing and onboarding tasks. In general, all HR users are able to ***assign*** tasks and workflows, however, only users with proper permissions can ***create*** them.

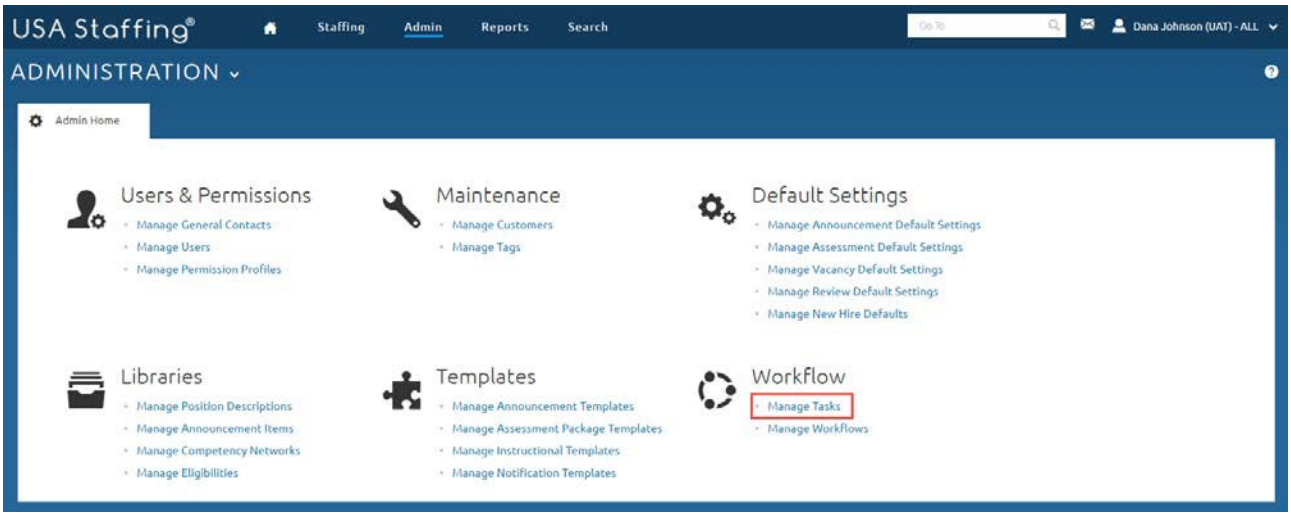
Tasks

Tasks are assignments that must be completed by an HR User, Hiring Manager, Onboarding User and/or New Hire in order to complete the staffing process. Tasks can include assignments such as completing forms, uploading documents, background investigation requirements, fingerprint appointments, etc. A complete list of system level tasks is available in the Appendix.

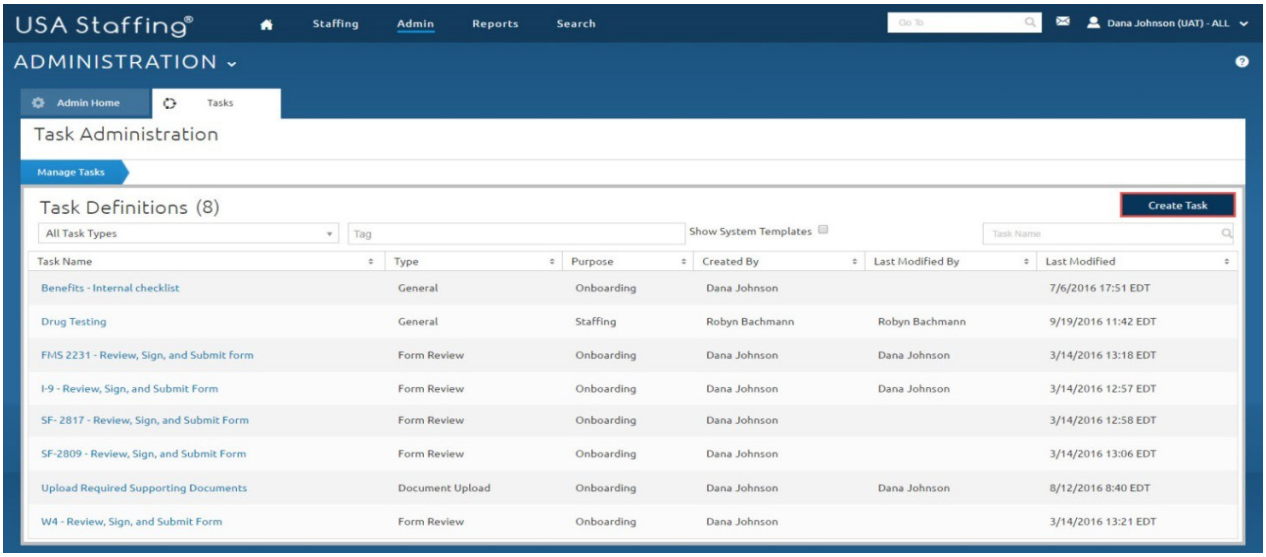
Creating Tasks

Tasks are created in the Admin area. To create a task go to:

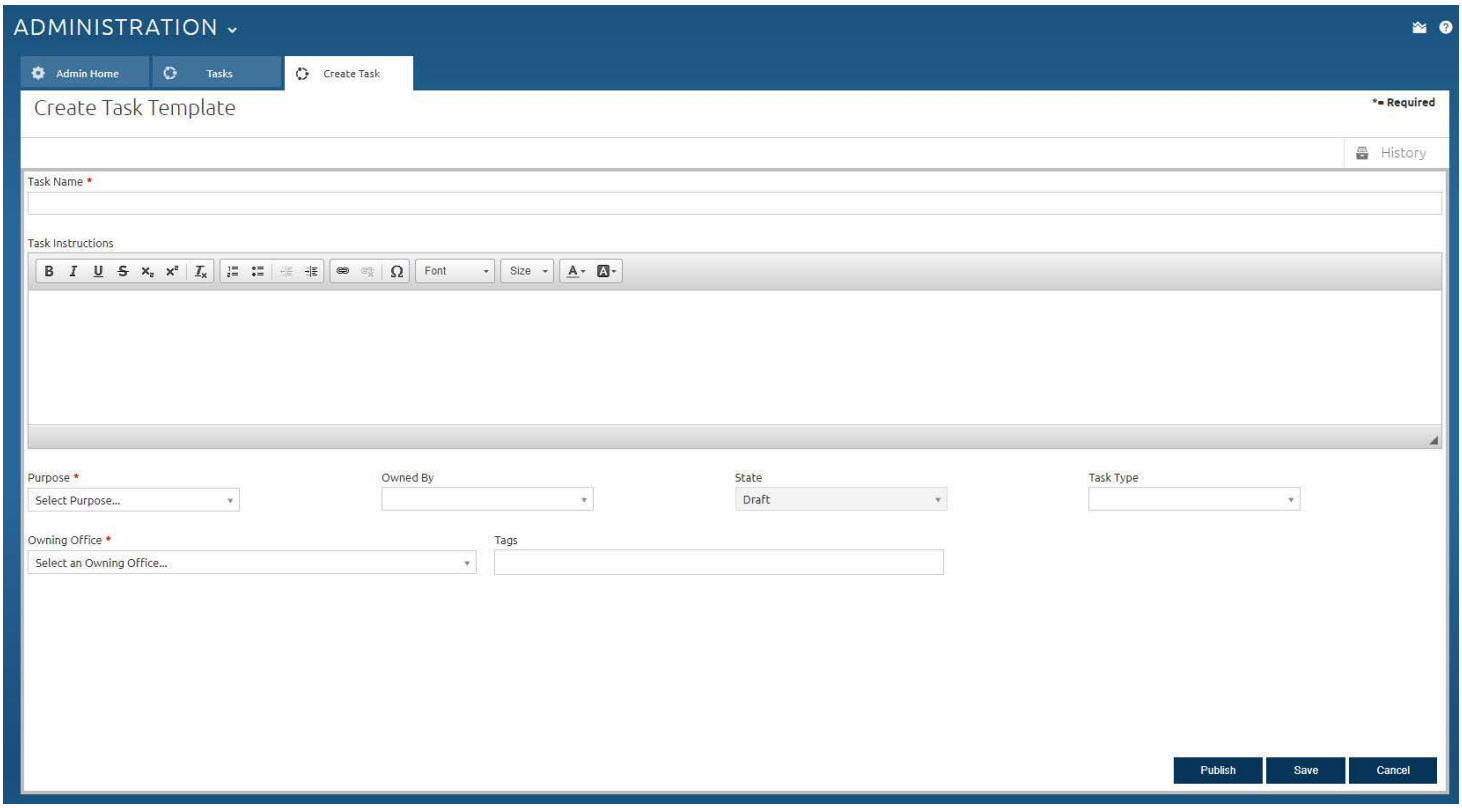
Admin > Workflows and click **Manage Tasks**.



Click the **Create Task** button.



After clicking the **Create Task** button, the Create Task Template page will display.



On this page you will:

- Enter the **Task Name**
- Enter the **Task Instructions** that provide guidance to the user about the details and requirements for completing the task.
- Select *Staffing* or *Onboarding* for **Purpose**
- Select an option in **Owned By**. The options are determined by the selected task purpose:

Staffing	**Onboarding**
New Hire	New Hire
Human Resources	Human Resources
Hiring Manager	

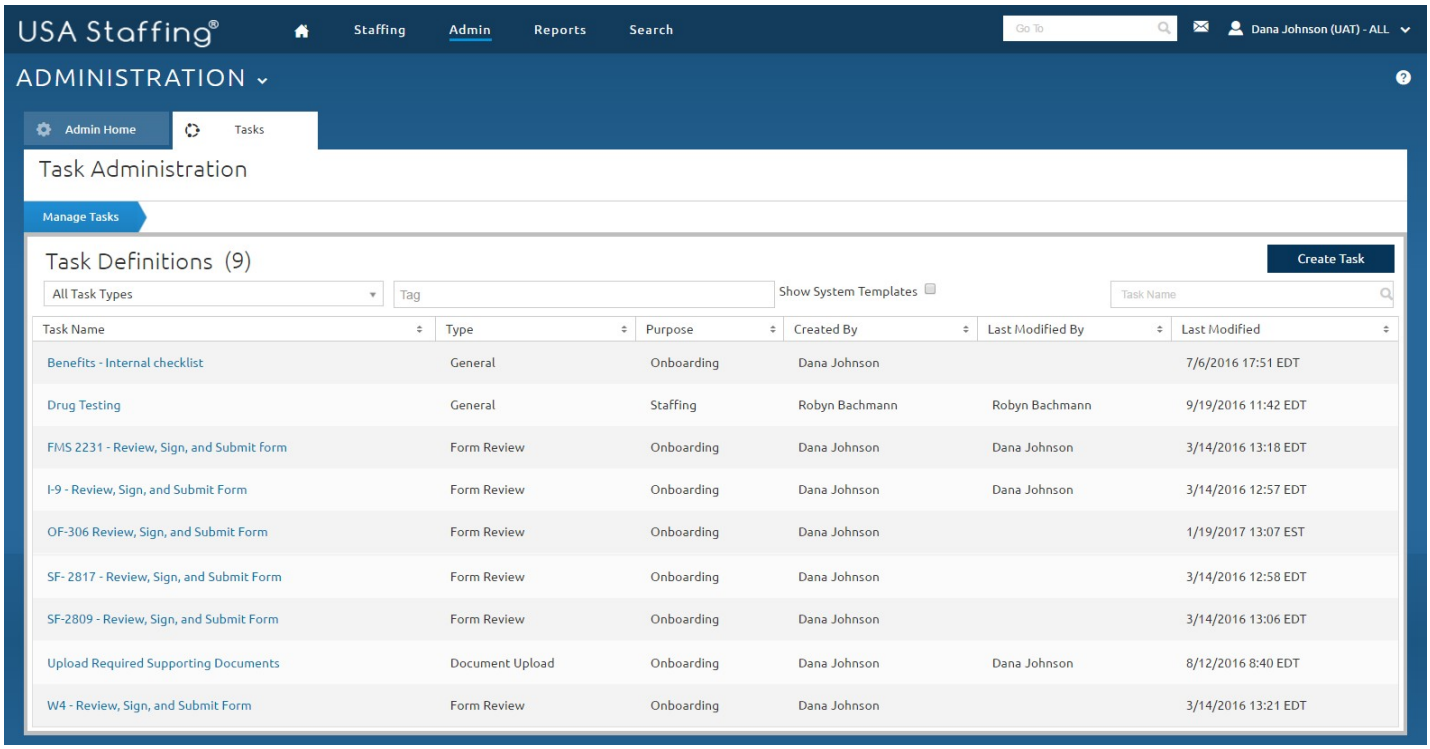
- The **State** field defaults to Draft. It automatically will be updated to Published when you click the Publish button below.
- Select an option in **Task Type.** The options are determined by the selected task purpose:

Staffing	**Onboarding**
General	Document Upload
	Form Review
	General

  Choose *Form Review* for tasks where the user needs to complete a form. Choose *Document Upload* for tasks where the user needs to upload a document. Choose *General* for all other tasks where the user needs to complete an assignment that is not related to a form or document (e.g. possibly an action such as verifying documents or completing a physical exam).
- For **Owning Office**, select the office that will own this task.

- For **Tags**, select all other offices that should have access to this task.
- If the task purpose is Onboarding, you are given the option of allowing this task to be assigned to candidates with a return status of **Vetting**.
- For **Form Review** or **Document Upload** tasks, click the **Add Forms** or **Add Documents** button.
- Click **Save** to save the task or **Publish** to make it available for use.

Click the Tasks tab to return to the Task Administration page to view the new task and all other available tasks. You can create additional tasks and select/edit this task or other existing tasks as necessary.



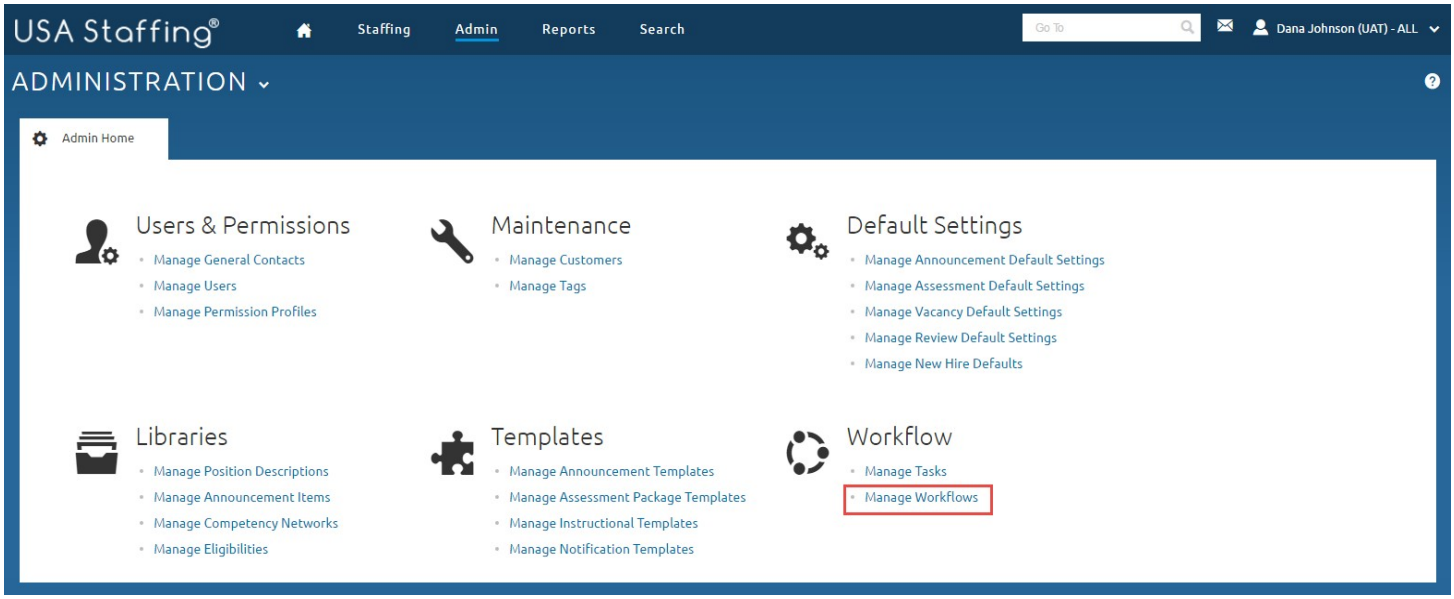
Workflows

A workflow is a bundle of tasks that can be assigned at the same time and includes established due dates for each task. Workflows improve your efficiency by allowing you to select one item that includes multiple tasks. Workflows also help ensure that tasks are assigned consistently and in accordance with your agency's procedures and timelines. Your office is responsible for creating customized workflows that align with your agency's hiring process. Creating and assigning workflows is strongly recommended in order for your agency to gather accurate data for reporting purposes. See the Designing Workflows section at the end of this document for further discussion of this topic.

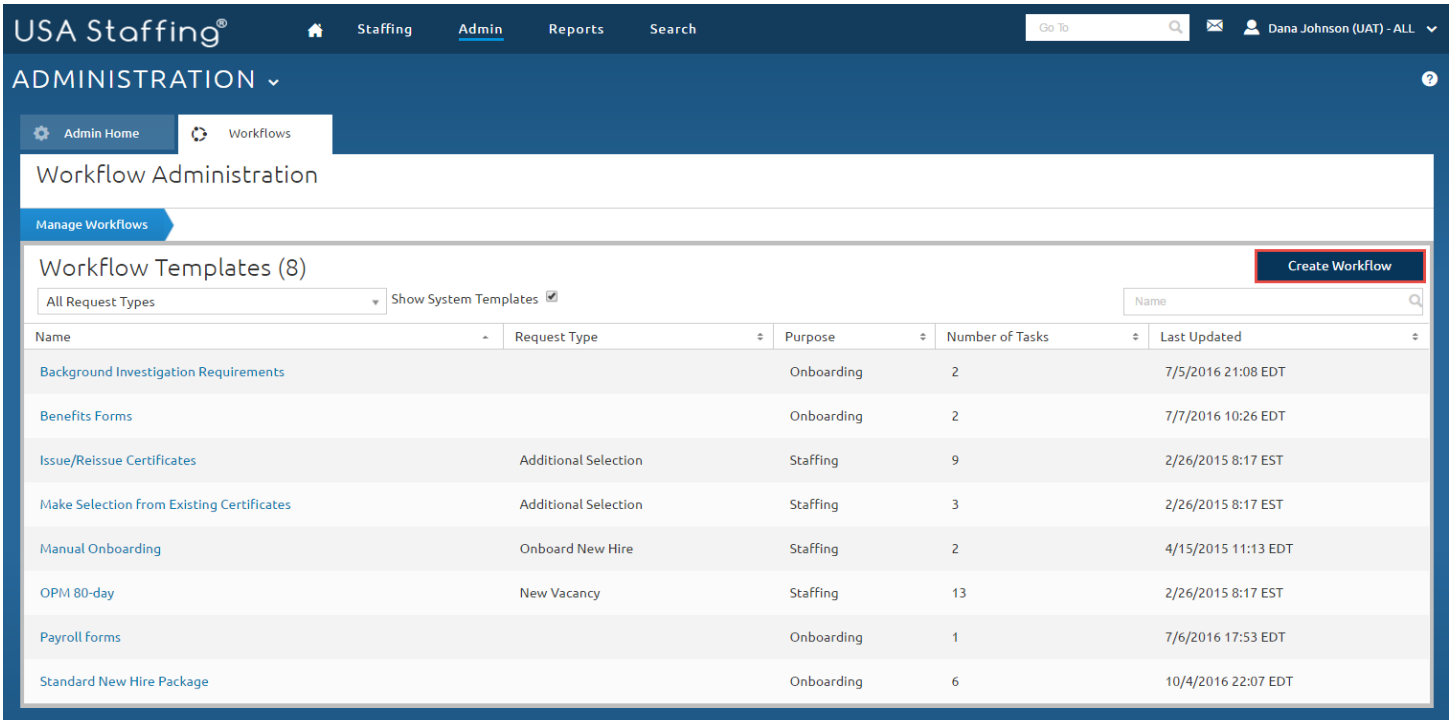
Creating Workflows

Workflows are also created in the Admin area. To create a workflow go to:

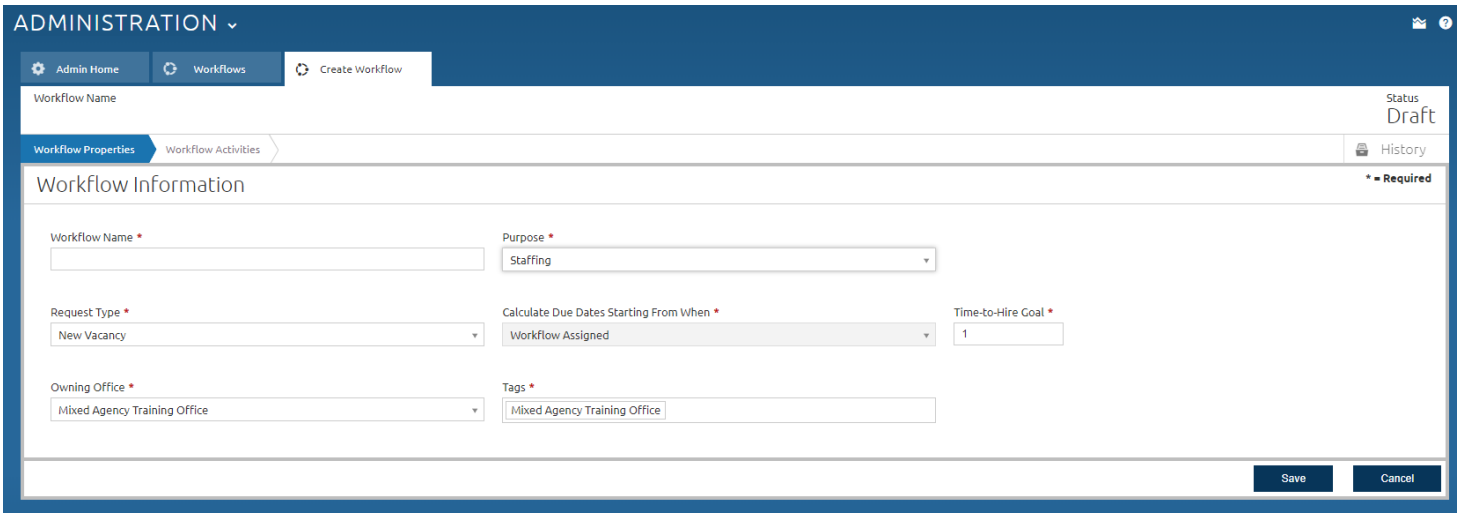
Admin > Workflows and click **Manage Workflows**.

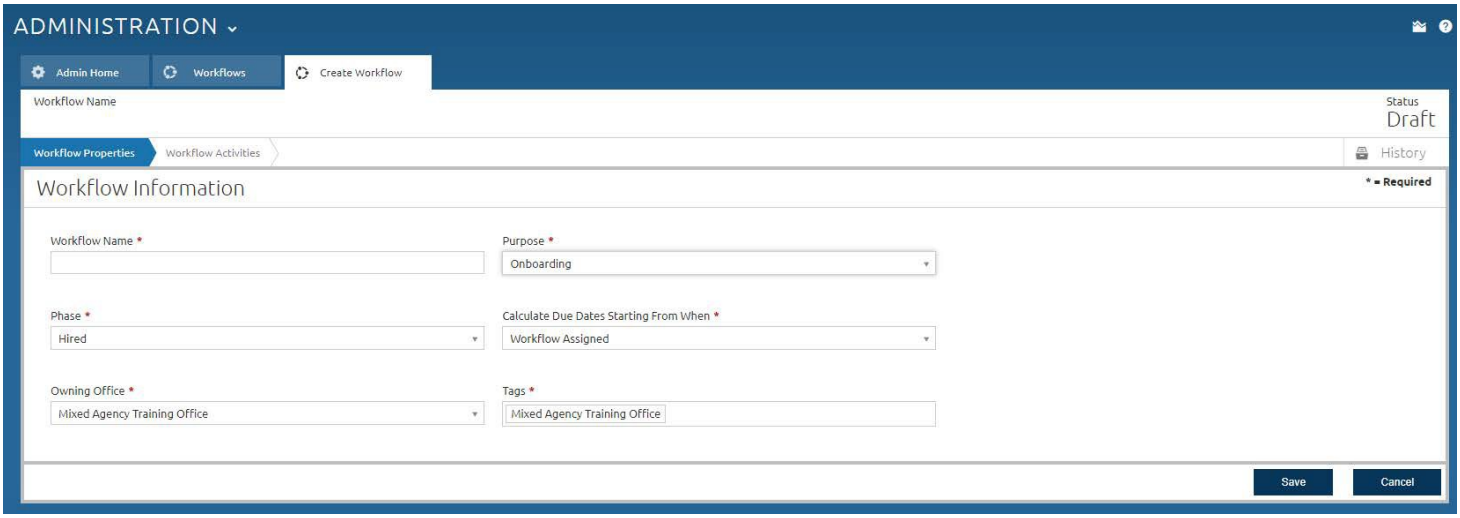


Click the **Create Workflow** button.



After clicking the **Create Workflow** button, the Workflow Information page will display. Depending on the **Purpose** selected, different fields will be generated.





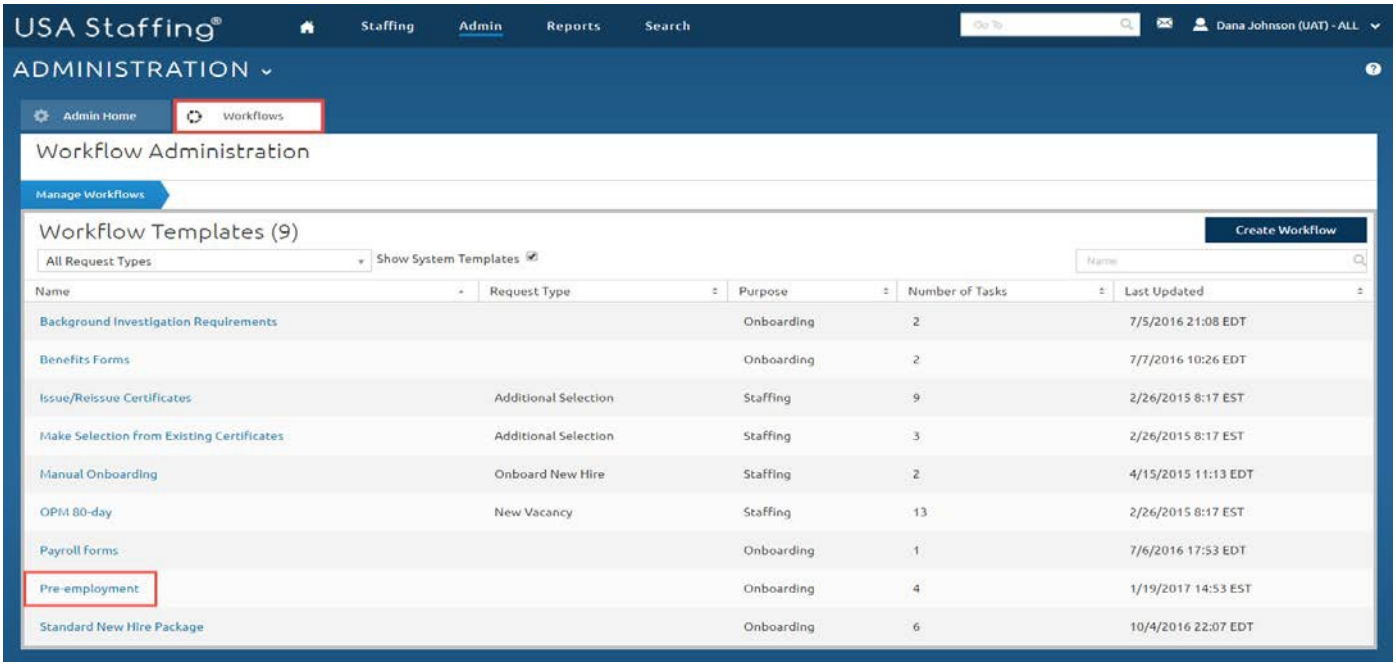
On this page you will:

- Enter the **Name** for the workflow.
- Select *Staffing* or *Onboarding* for the **Purpose.**
- If you have selected a **Purpose** of Staffing, select a **Request Type** of *New Vacancy* or *Additional Selection*.
- If you have selected a **Purpose** of Onboarding, select a **Phase** of *Vetting* or *Hired*.
- Choose the starting point for calculating due dates. The options are determined by the workflow purpose. Currently the only choice is Workflow Assigned – other system events will be added in the future.

Staffing	**Onboarding**
Workflow Assigned	Workflow Assigned

- If the workflow purpose is Staffing, enter a time-to-hire goal in calendar days. This value is used for reporting.
- Select the **Owning Office**.
- For **Tags**, select all other offices and organizations that should have access to this workflow.
- Click **Save**.

Click the Workflows tab to view the workflow you created listed under the Workflow Templates. You can create additional workflows and/or edit this workflow or other existing workflows as necessary.

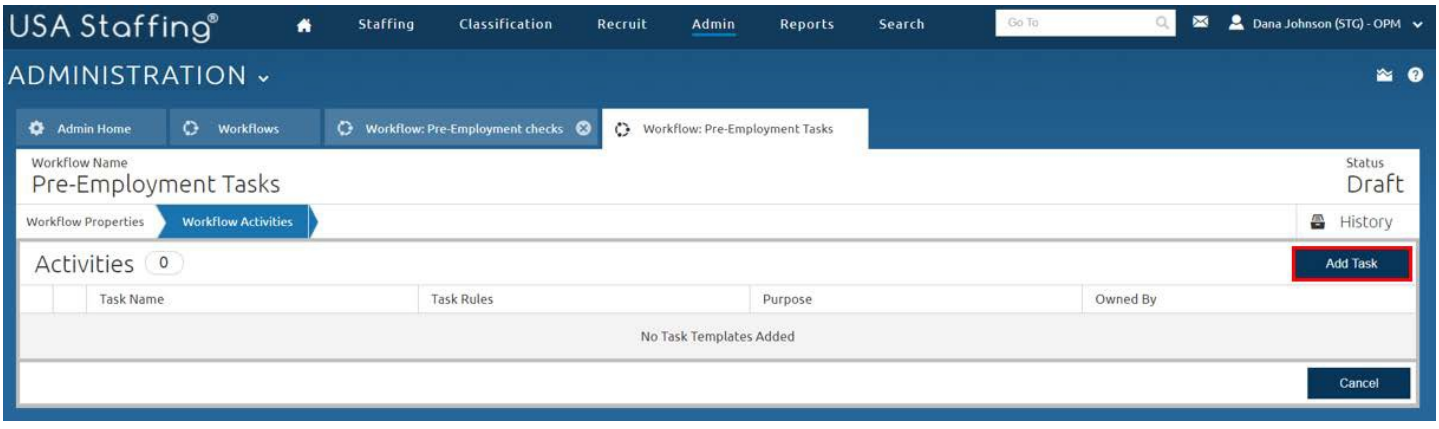


Adding Tasks to Workflows:

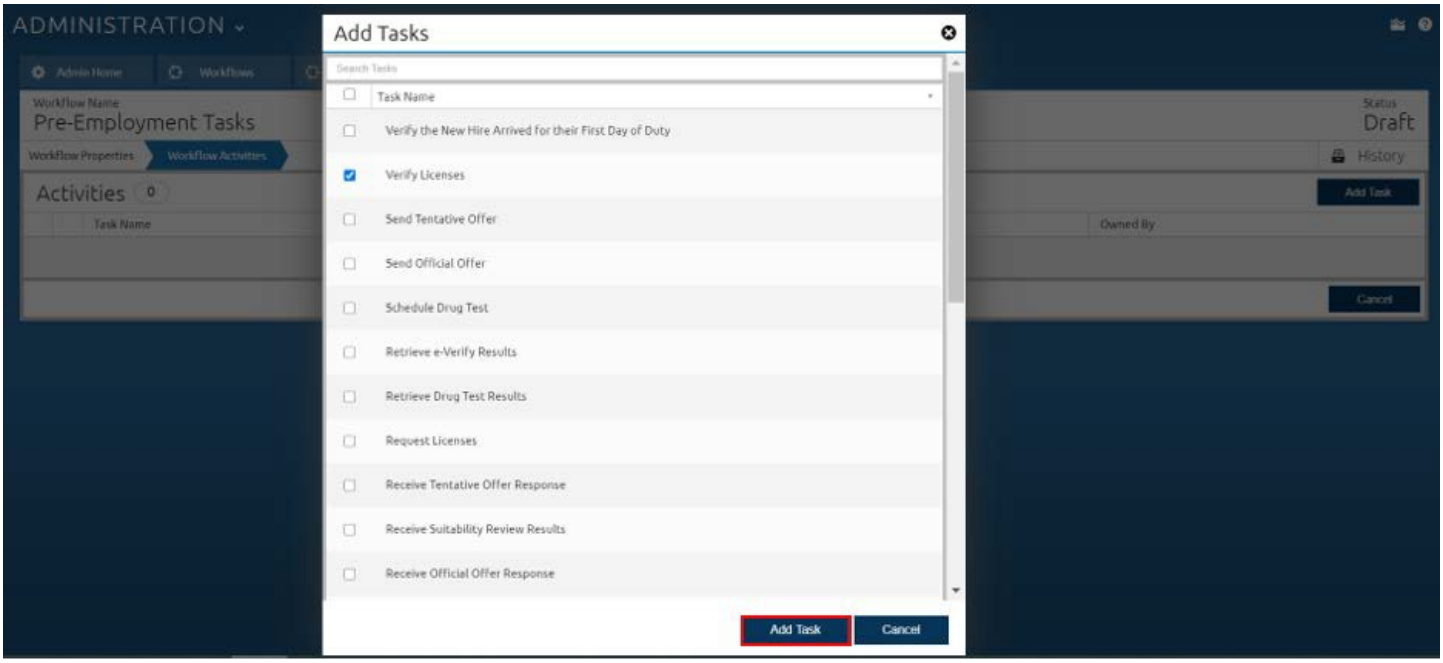
Now that you have created a task(s) and a workflow, HR users can assign the workflow or individual tasks to a record.

Note: The same task can be added to multiple workflows; however, the system will not allow you to add the same task to the same workflow more than once. The system will also not assign the same task twice to the same new hire. For example, if you assign a pre-employment workflow and then assign a workflow designed for people who have passed suitability checks, the new hire will only get one Send Tentative Offer task, even if this task appears in both workflows. In addition, you cannot add Staffing tasks to an Onboarding workflow.

To add Tasks to an existing Workflow, go to **Admin > Manage Workflows** and open an existing Workflow Template. Click the **Tasks** tab and then click **Add Task** (button).



A pop-up window will appear that displays a list of available tasks that you can add to the workflow. Select all appropriate tasks for the workflow then click the **Add Task** button within the pop-up window. You will only see tasks that are consistent with the purpose you have chosen for the workflow (e.g., you will not see an Issue Certificates task if you are creating an Onboarding workflow) and whether the workflow is used for vetting (e.g., you will not see a Send Official Offer task if you are creating a workflow that may be used for pre-employment).

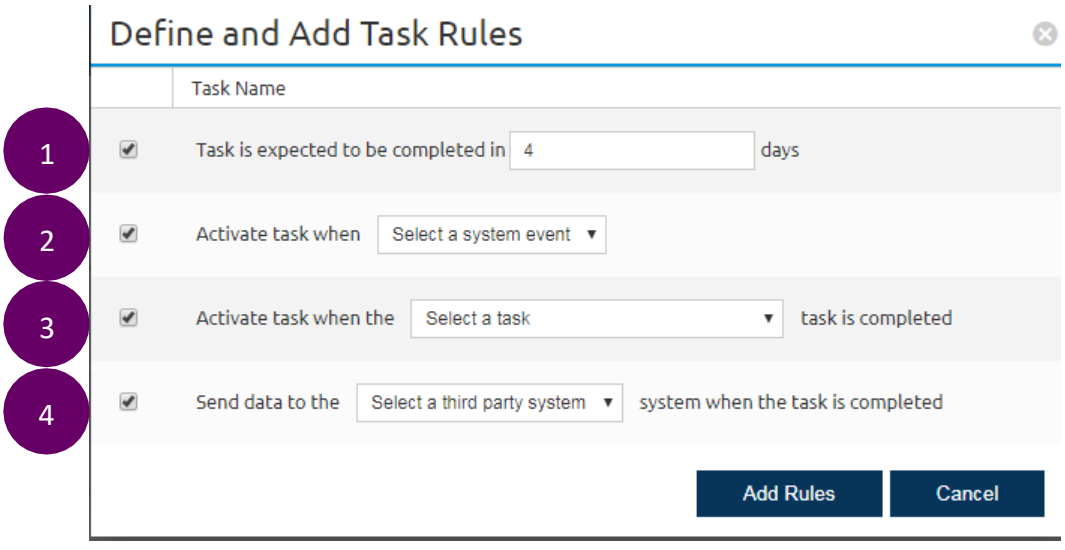


Task Rules

The **Workflow Activities** page will display each selected task and the **Task Rules** associated with the task. Click the number or plus sign to reveal the task rules.

Task rules are not required. However, if you do not set any rules, then all tasks will be due on the day the workflow is assigned. New hire tasks are always Pending upon assignment unless the task rules are set to make them Active.

Check the box to the left of each task rule to make the rule editable.



- (1) Set an expected duration for the task. The due date will be the date the task becomes active plus the value entered in this field. USA Staffing uses calendar days which may make due dates occur on non-working days.
- (2) Trigger the task to update from Pending to Active status when a system event occurs. Currently there is only one option here but others will be added in the future.

- Workflow is assigned – This is the current date when the workflow is assigned. Staffing workflows are assigned at request approval. Onboarding workflows may be assigned at a later date**. If you want the task to be active when workflow is assigned, select this option.**

- (3) Trigger the task to update from Pending to Active status when another task in the same workflow is completed. If the preceding task is completed late, the due date for the succeeding task will be updated so that the assignee still has the same amount of time to complete the task.
- (4) If the workflow purpose is Onboarding, choose a system to update when the task is completed. This option will only display if your agency has established a New Hire Interconnection.

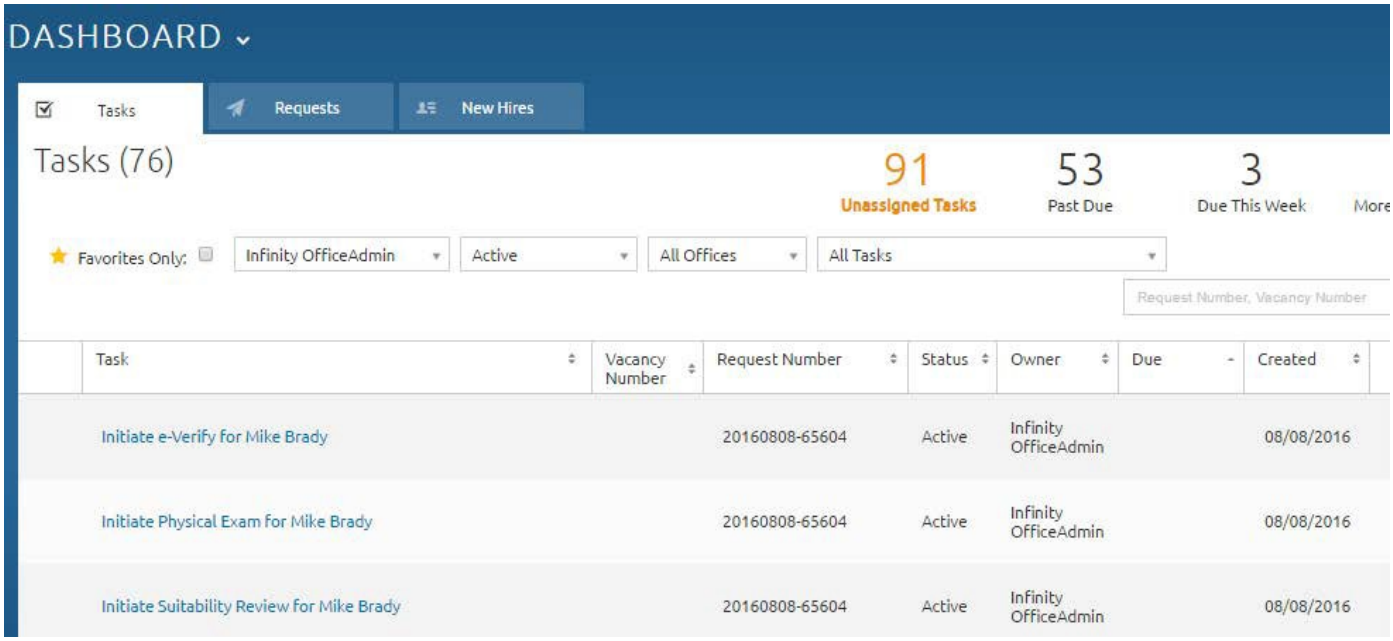
Note: You may only assign an activation task or an activation action rule on the same task.

These rules interact with each other. Here are some examples:

- If I only select duration (1), the task is assigned in Pending status & is due on today's date plus the duration. That due date will not change and the task will remain in Pending status unless a user manually updates it to Active.
- If I only select the system event of Workflow is Assigned (2), the task will be assigned in Active status and the due date will be today.
- If I select a duration (1) and system event of Workflow is Assigned (2), the task will be assigned in Active status and the due date will be today's date plus the duration.
- If I select duration (1) and pick a task as a predecessor (3), then the task will be assigned in pending status and will become active when the predecessor task is completed. The due date when assigned will be predecessor task's due date plus duration, and will change if the preceding task completes early or late.

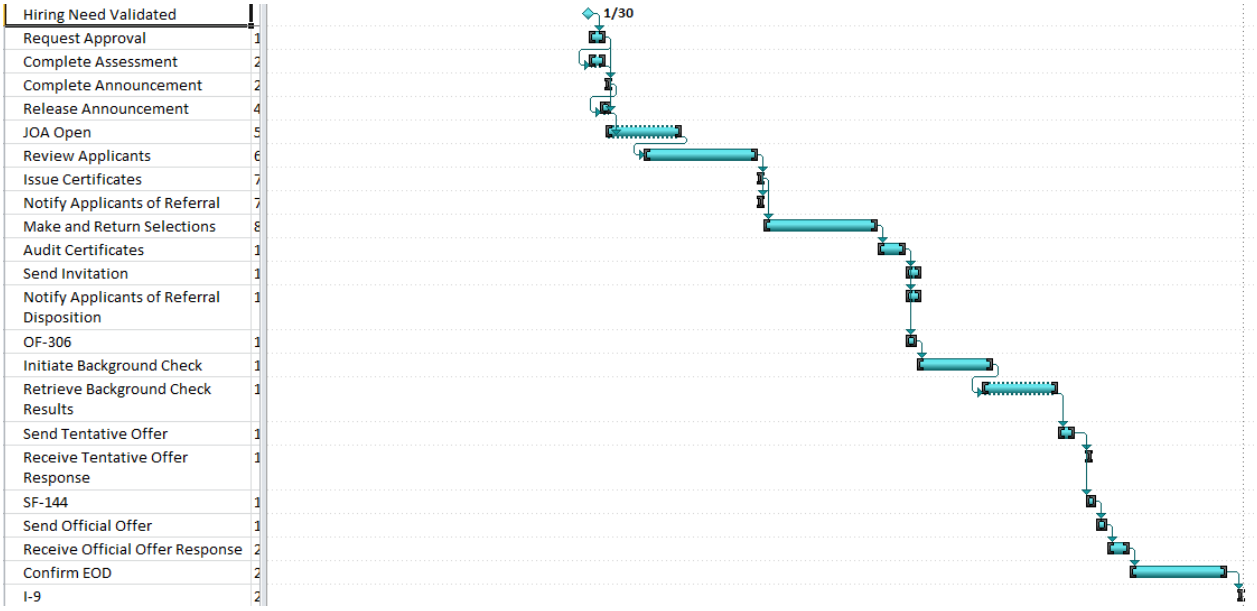
You can minimize clutter on HR and Onboarding users' dashboards by setting tasks to activate only when a preceding task is completed. For example, you have to initiate a background check before you can receive the results, so the second task could be set to update to Active status after the first task is completed.

Note: New hires do not see the status of tasks, only when the task is Due and the date a Task was completed. If a task is in pending status, they will see it on their dashboard. See an example of how to use task properties in the Designing Workflows section below.



Designing Workflows

Let's walk through an example. Suppose your hiring process looks like the one outlined below. How do you turn this into a workflow in USA Staffing?



The process illustrated above includes request approval, creating the announcement, reviewing applicants, making selections, all the way through to confirming entry on duty. The rest of this document will explore options for translating a process such as this into USA Staffing workflows.

Most customers find it easiest to split out Onboarding into phases like pre-employment, final offer, and after EOD. Splitting workflows this way reduces the number of tasks that are assigned to the new hire and HR to only those that are relevant at any given point in time. For example, if you assign a benefits form at pre-employment and the new hire is not selected, he/she will have wasted time completing unnecessary forms. Splitting Onboarding into phases also allows you to make use of the milestone types that are driven by projected and actual entry on duty dates. Onboarding workflows and tasks can be assigned at any time during the onboarding process.

In the examples below, the tasks in blue are Staffing tasks and tasks in green are Onboarding tasks.

Staffing:

Task	Duration	Activate After System Event or Task	Status when Workflow Assigned	Due Date if Workflow Assigned March 1, 2018
Complete Assessment	2	Workflow is Assigned	Active	March 3, 2018
Complete Announcement	1	Workflow is Assigned	Active	March 2, 2018
Release Announcement	2	Complete Announcement	Pending	March 4, 2018
Review Applicants	15	Release Announcement	Pending	March 19, 2018
Issue Certificates	1	Review Applicants	Pending	March 20, 2018

Notify Applicants of Referral	1	Issue Certificates	Pending	March 21, 2018
Make and Return Selections	15	Issue Certificates	Pending	April 4, 2018
Audit Certificates	3	Make and Return Selections	Pending	April 7, 2018

Invitation:

Task	Duration	Activate After System Event or Task	Status when Workflow Assigned	Due Date if Workflow Assigned April 1, 2018
Send Invitation	3	Workflow is Assigned	Active	April 4, 2018
OF-306	2	Workflow is Assigned	Active	April 3, 2018
Initiate Background Check	10	Workflow is Assigned	Active	April 11, 2018
Receive Background Check Results	10	Initiate Background Check	Pending	April 21, 2018

Tentative Offer:

Task	Duration	Activate When	Status when Workflow Assigned	Due Date if Workflow Assigned May 1, 2018
Send Tentative Offer	3	N/A	Active	May 4, 2018
Receive Tentative Offer Response	2	Send Tentative Offer	Pending	May 6, 2018
SF-144	2	N/A	Active	May 3, 2018

Official Offer and EOD:

Task	Duration	Activate When	Status when Workflow Assigned	Due Date if Workflow Assigned May 15, 2018
Send Official Offer	1	N/A	Active	May 16, 2018
Receive Official Offer Response	2	Send Official Offer	Pending	May 18, 2018
Verify the New Hire Arrived for First Day of Duty	14	Receive Official Offer	Pending	June 1, 2018
I-9	1	Verify the New Hire Arrived for First Day of Duty	Pending	June 2, 2018

Appendix A

Users are highly encouraged to use the USA Staffing created and maintained tasks when possible. The tables below list the tasks that may be used for Staffing workflows and Onboarding workflows. If a custom task is needed, refer to the Creating Tasks section of this document.

Staffing Task Name
Audit Certificates
Complete Announcement
Complete Assessment Package
Issue Certificates
Make and Return Selections
Notify Applicants of Referral
Notify Applicants of Referral Disposition
Release Announcement
Return Review
Review Announcement
Review Applicants
Review Applicant Assignment
Review Request
Send Certificates
Update Announcement

Onboarding Task Name
Adjudicate Childcare Background Checks
Complete New Hire Questionnaire
Complete USAS PSR-01: Personnel System Record Creation Form
Confirm Physical Exam Completion
Establish Projected Entry on Duty Date
Initiate Background Investigation/Security Clearance
Initiate Childcare Background Checks
Initiate e-Verify
Initiate Physical Exam
Initiate Suitability Review
Receive Background Investigation/Security Clearance Results
Receive Childcare Background Check Results
Receive Official Offer Response
Receive Suitability Review Results
Receive Tentative Offer Response
Request Licenses
Retrieve Drug Test Results
Retrieve e-Verify Results
Schedule Drug Test
Send Official Offer
Send Tentative Offer
Set Onboarding Document Type for Application Documents
Transmit Documents to eOPF
Transmit Forms to eOPF
Verify Licenses
Verify the New Hire Arrived for their First Day of Duty