



## New Hires Training Exercise 4: Completing the New Hire Record.

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 completing the new hire record. You will need to complete New Hires Exercises 1 or 2 and 3 before proceeding with this exercise.

1. Now that the new hire has completed the assigned tasks, log in as a HR User or Onboarding User, open the record and filter the Manage Tasks page to the **New Hire** tasks. All of the New Hire tasks should display in **Complete** status.

The screenshot shows the USA Staffing web application interface. At the top, there is a navigation bar with tabs for Staffing, Classification, Recruit, Admin, Reports, and Search. Below this, the user's name 'Dana Robinson (STG) - ALL' is visible. The main content area is titled 'NEW HIRE: TAMMY BROWN'. Underneath, there are tabs for Overview, Assignments, and Questionnaires. The 'Manage Tasks' tab is active, showing a list of tasks for 'TAMMY BROWN' (Customer: ASMB User Publications, New Hire Number: H4UCT-R5AM). The tasks are filtered by 'New Hire' status. The list shows five completed tasks, all with a status of 'Complete' and a due date of 09/06/2019 or 09/07/2019. The tasks are: Complete New Hire Questionnaire, OF-306 Declaration of Federal Employment, I-9 Employment Eligibility Verification, Schedule Fingerprint appointment, and W4 - Review, Sign, and Submit Form. A 'Save' button is located at the bottom right of the task list.

Task Name	Owner	Status	Due	Completed Date
Complete New Hire Questionnaire	New Hire	Complete	09/06/2019	08/31/2019
OF-306 Declaration of Federal Employment	New Hire	Complete	09/06/2019	08/31/2019
I-9 Employment Eligibility Verification	New Hire	Complete	09/07/2019	08/31/2019
Schedule Fingerprint appointment	New Hire	Complete	09/07/2019	08/31/2019
W4 - Review, Sign, and Submit Form	New Hire	Complete	09/07/2019	08/31/2019

Image 1: A new hire's record opened on the Manage Tasks page displaying the list of completed New Hire tasks.

- Navigate to the Forms page and view the information in the **Agency Next Action** column. This column will display the actions you need to take on the forms. To take actions on the forms, proceed to the Questionnaires page to complete the questionnaires.

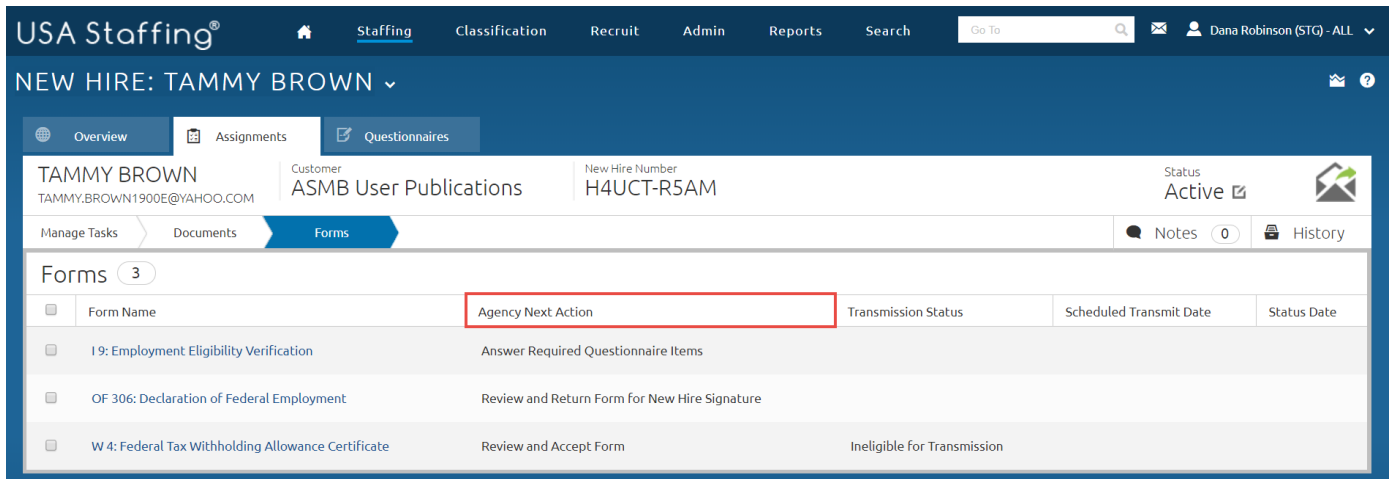


Image 2: A new hire's record opened on the Assignments tab displaying the Forms page.

- Go to the Questionnaires page and open each questionnaire and complete all fields within the questionnaires.

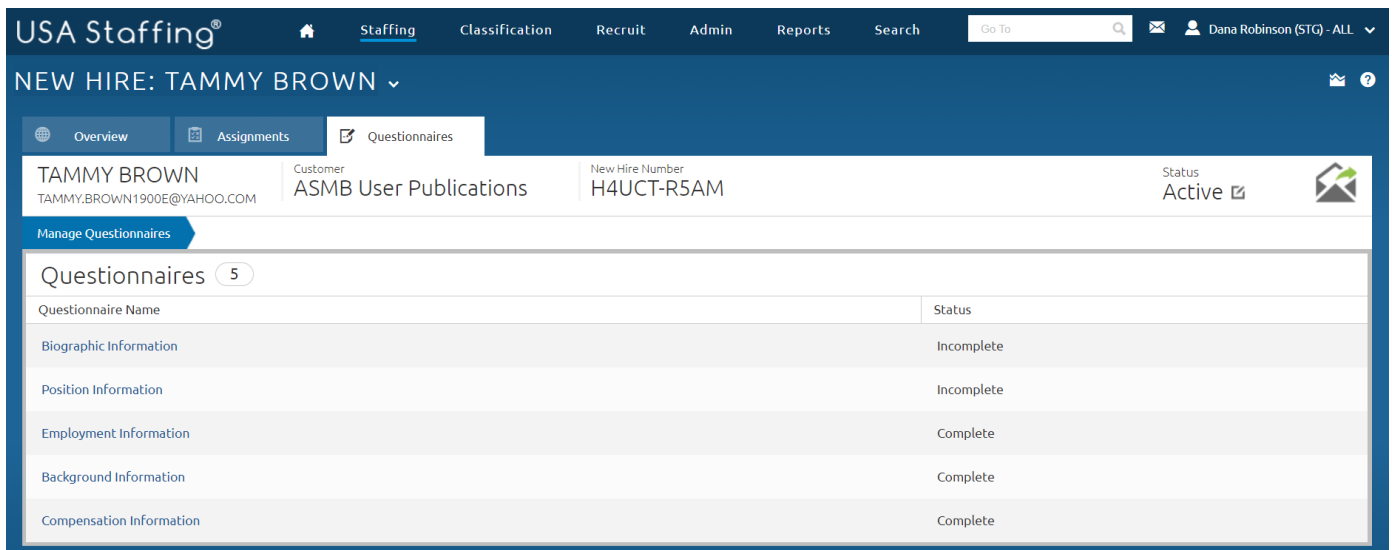


Image 3: Questionnaires tab displaying the Manage Questionnaires page.

- Once you have opened each questionnaire and completed all of the required fields, the **Status** for the questionnaires will display as Complete.

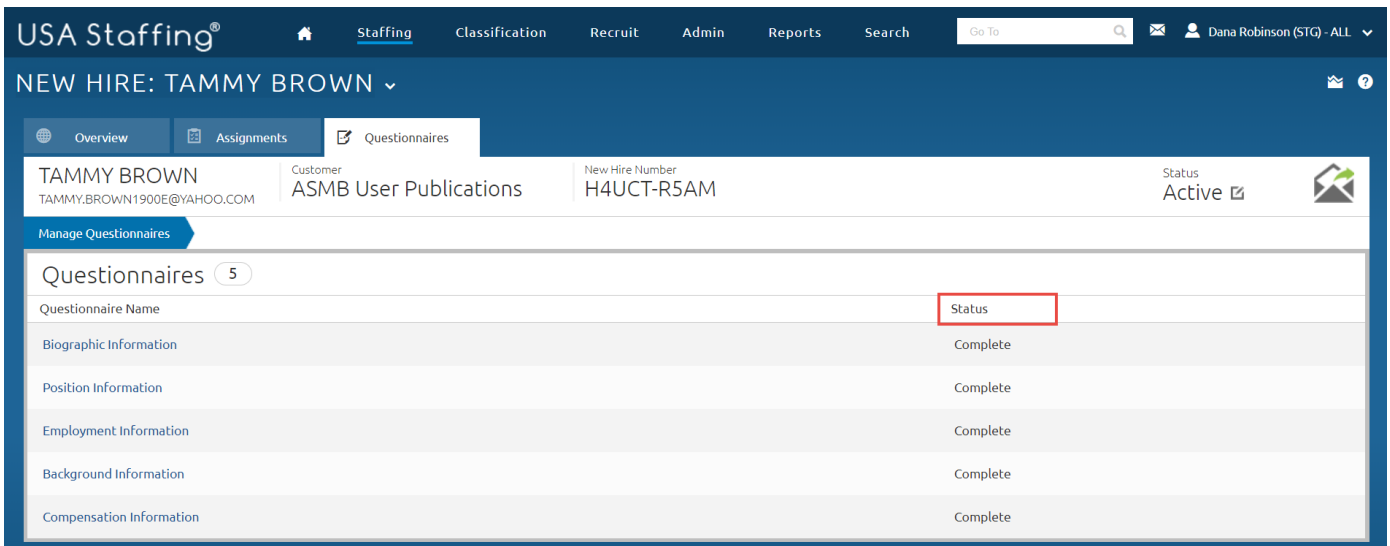


Image 4: Questionnaires tab displaying the Manage Questionnaires page with all questionnaires in Complete status.

- Now that the questionnaires are complete, you can begin signing and accepting the forms. Click the Assignments tab, then navigate to the Forms page. Review the updated statuses in the **Agency Next Action** column. Then, open each form and review it for accuracy. Once reviewed, sign and accept each form.

**Note:** For some forms, such as the OF 306: Declaration for Federal Employment, this form requires two signatures from the new hire. If this form is assigned, you will need to return this form to the new hire for the second signature. To do this, refer to the instructions on how to return forms in this online help link: [https://help.stage.usastaffing.gov/USAS/index.php?title=Returning a submitted form to a new hire for signature](https://help.stage.usastaffing.gov/USAS/index.php?title=Returning+a+submitted+form+to+a+new+hire+for+signature) After returning the form, log in as the new hire, apply the second signature and submit the form back to HR.

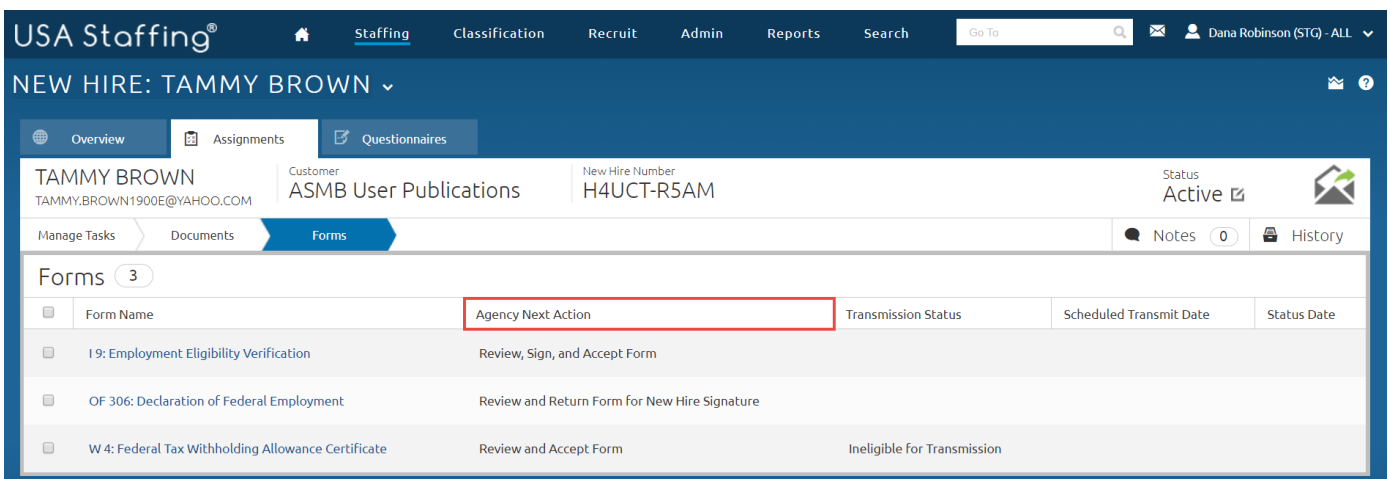


Image 5: Assignments tab displaying the Forms page and the Agency Next Action information.

6. Continue on with signing and accepting each assigned form.

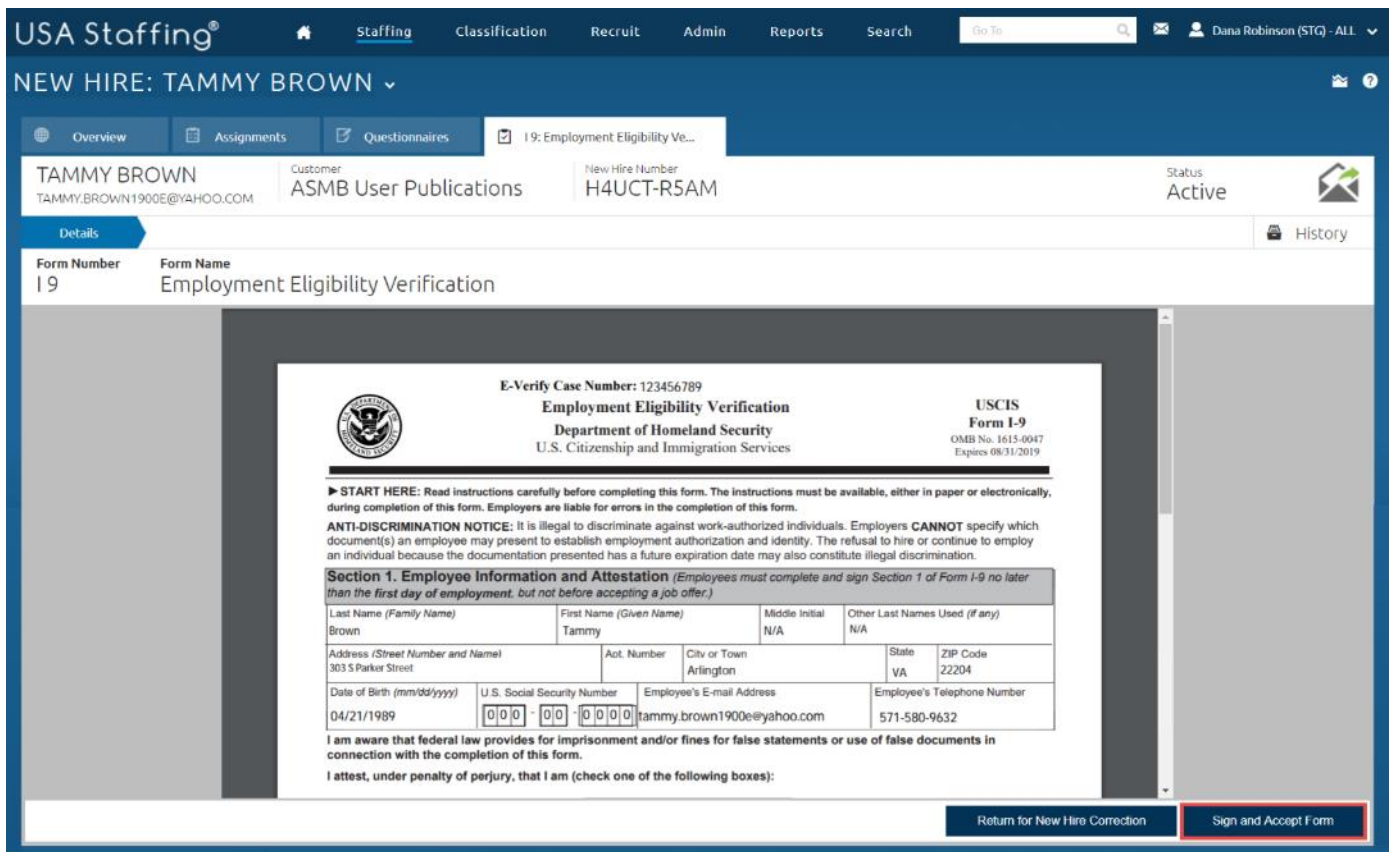


Image 6: Forms page displaying the PDF version of the form.

7. Once all the forms are signed and accepted, click on the envelope icon and send the **Official Job Offer** notification.

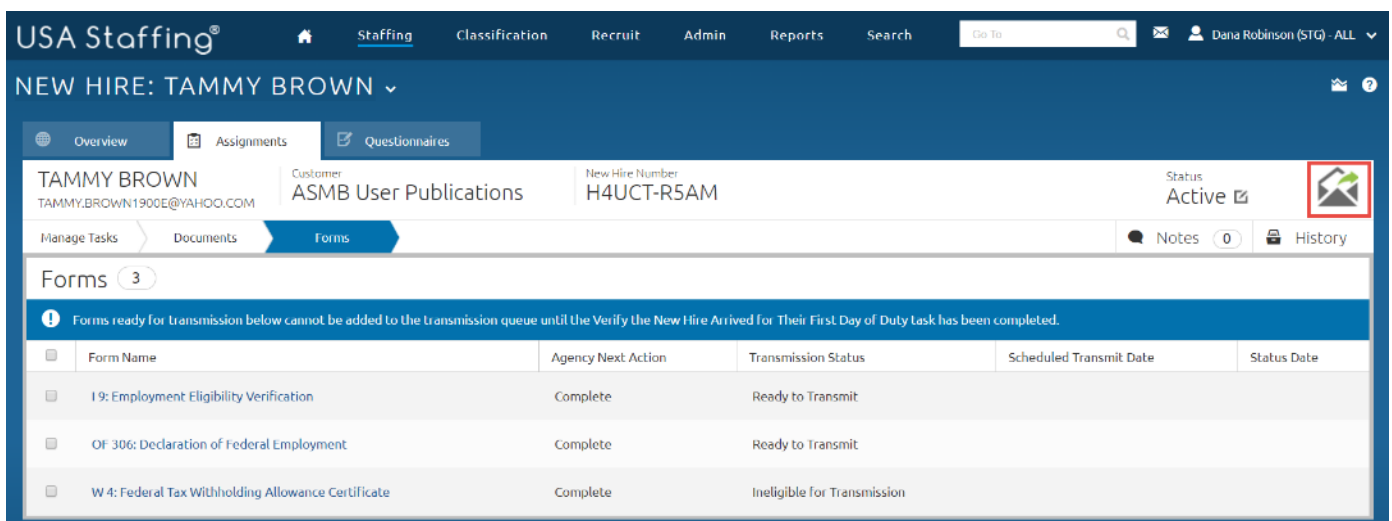


Image 7: Forms page displaying the highlighting the envelope icon.

- After the Official Offer notification has been sent, check your e-mail as the new hire to review and respond to the job offer. Or, while logged in as the HR or Onboarding User, you may navigate to the Notification History page, view the contents of the Official Offer notification, then copy and paste the official offer unique link into another browser to access the job offer. Then, accept the offer and log into Onboard.

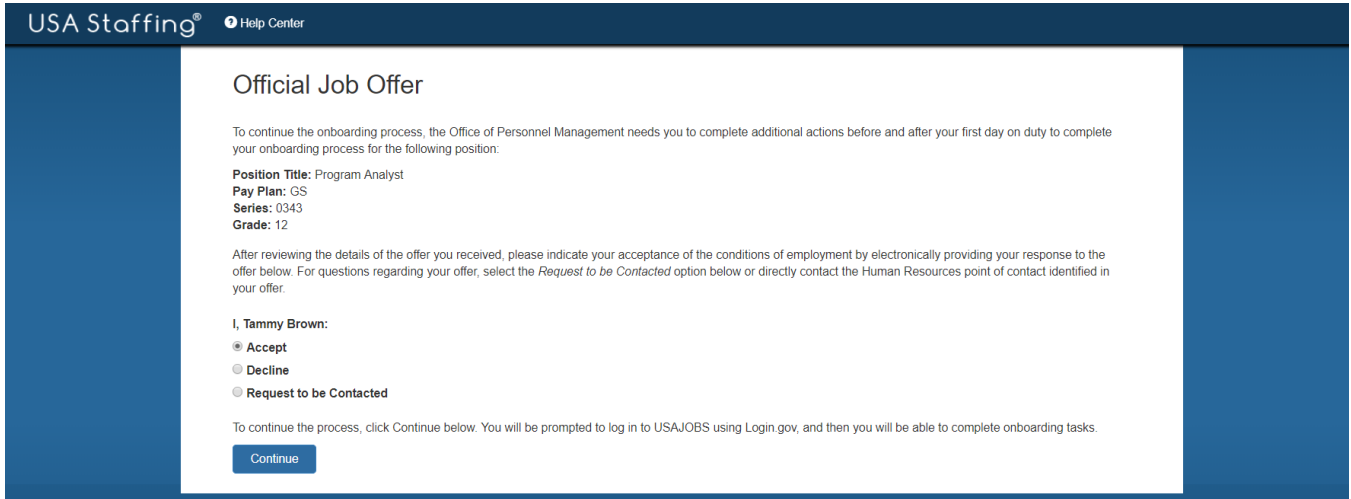


Image 8: USA Staffing Onboard page displaying the Official Job Offer response page.

- As the new hire, after accepting the official offer and logging in, review the assigned tasks and ensure they are all complete. You may log out of the Onboard as the new hire.

- Navigate back to the USA Staffing interface for HR and Onboarding Users. You will now confirm the official start date for the new hire. For the purposes of this exercise, we will consider today's date as the official start date and confirm that the new hire has arrived on-site for the first day of work. To confirm the official start date, go to the Overview page of the new hire's record and open the Onboarding Information tab. Scroll to the bottom of the page and click the **Verify New Hire Arrived for First Day of Duty** button then click **Continue** to proceed.

**Note:** When onboarding new hires, do not click this button until the new hire has arrived onsite for the first day of work. Clicking this button enters a completion date for the *Verify the New Hire Arrived for their First Day of Duty* task. The completion date for this task is considered the new hire's official start date for time-to-hire metrics. Also, some forms cannot be completed by the new hire until the first day of work and when the *Verify the New Hire Arrived for their First Day of Duty* task is complete.

The screenshot shows the USA Staffing interface for a new hire, Tammy Brown. The page is titled "NEW HIRE: TAMMY BROWN" and includes a navigation bar with tabs for Overview, Assignments, and Questionnaires. The main content area is divided into three sections: Summary, Contact Information, and Assignments.

**Summary**

Name	Tammy Brown
Pay Plan-Series-Grade	GS-0343-12
PCS Eligible	<input type="checkbox"/>
Position Title	Program Analyst
Office	ASMB User Publications
Customer	ASMB User Publications
Creation Date	8/1/2019
Start Date	Not Set
Request Number	20190729-33324
Vacancy	10088838
Certificate Number	20190729-LJU-001
Tentative Offer	Accepted: 8/30/2019 Login.gov/USAJOBS Username: tammy.brown1900e@yahoo.com
Official Offer	Accepted: 9/1/2019

**Contact Information**

Supervisor/Manager	Damon Carter
Onboarding Process Owner	Dana Robinson
HR Contacts	Dana Robinson
Benefit Contacts	Robyn Bachmann
Payroll Contacts	Kasey Acres

**Assignments**

Tasks	Forms	Documents
Incomplete New Hire Tasks	Incomplete Forms	Application Documents
Completed New Hire Tasks	Completed Forms	Onboarding Documents
Incomplete Agency Tasks		
Completed Agency Tasks		

At the bottom of the page, a button labeled "Verify New Hire Arrived for First Day of Duty" is highlighted with a red box. A "Save" button is also visible in the bottom right corner.

Image 9: Overview page displaying the highlighted Verify New Hire Arrived for First Day of Duty button.

11. Next, enter today's date in the **Date New Hire Arrived for First Day of Duty** field, then click the Confirm button.

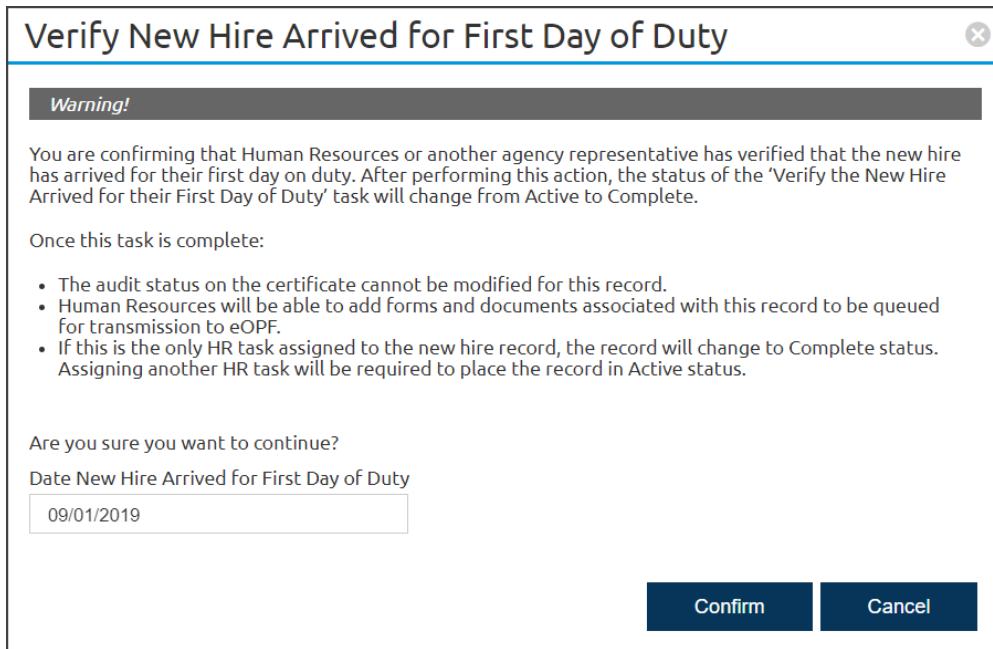


Image 10: Entering official start date in the Date New Hire Arrived for First Day of Duty field.

12. After confirming the start date, go to the Assignments tab and review the Manage Tasks page. Make sure the page is filtered to the Human Resources tasks. Enter the completion date for any incomplete tasks. Also, this page may now display two new transmission tasks called **Transmit Forms to eOPF** and **Transmit Documents to eOPF**. These tasks were assigned based on forms and documents you accepted.

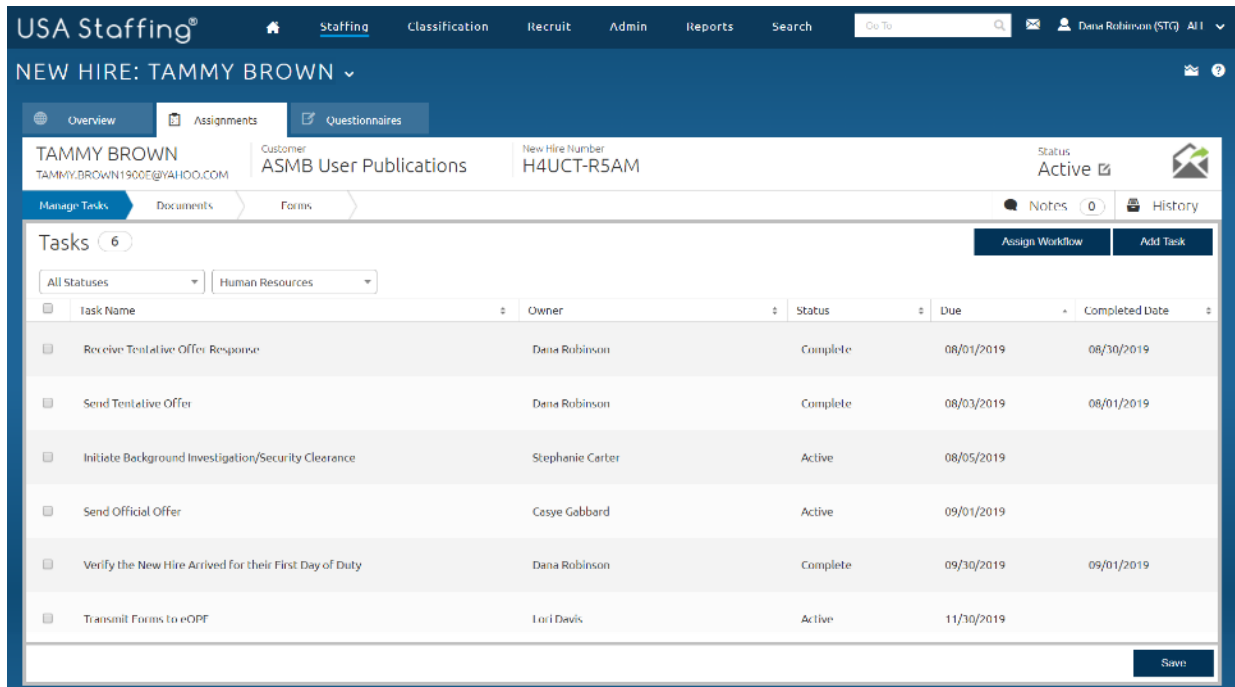


Image 11: Manage Tasks page with the page filtered to display the Human Resources tasks.

13. To complete the transmission tasks, let's open the Documents page first. If there are documents listed on this page you will need to assign a document type to each document.
  - a. To assign the document type, click on "No Document Type Selected" next to each document.
  - b. Use the drop-down menu to select and assign the appropriate document type. The **Transmission Status** for each document should now display *Ready to Transmit* or *Ineligible for Transmission*.
  - c. Check the box next to each document then click the **Don't Transmit to eOPF** button.

**Note:** Since this is a practice exercise, the new hire will not have an active Social Security Number (SSN). Therefore, you will use the **Don't Transmit to eOPF** button instead of the **Add to eOPF Queue** button in order to complete this exercise without having to send files to the eOPF system through the Stage site. (Contact your Office Administrator if your agency has access to test SSNs to transmit files to eOPF in Stage)

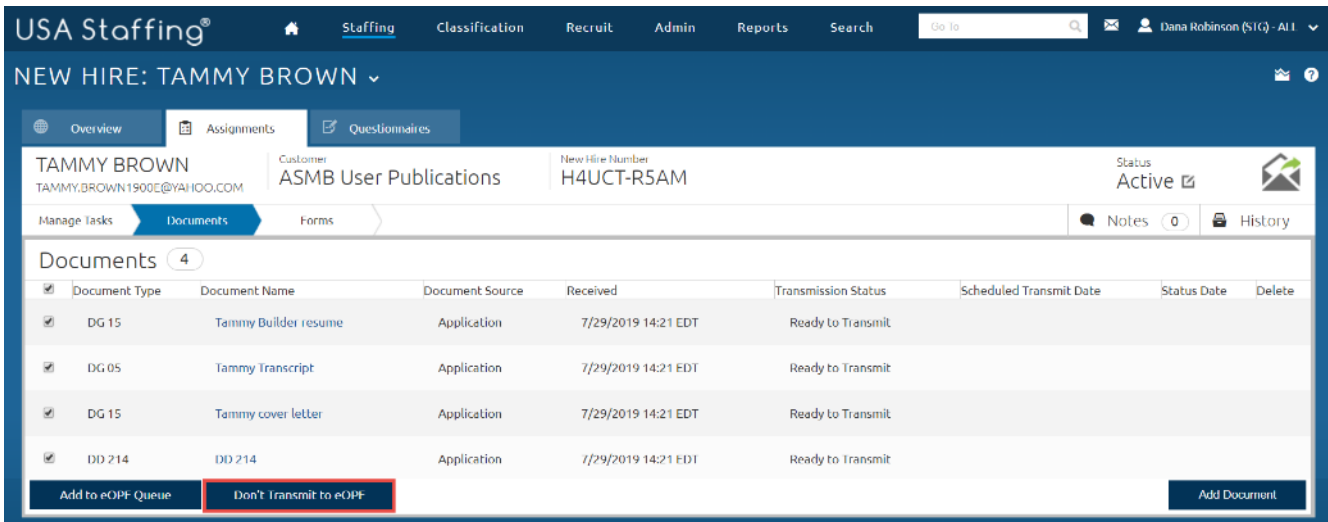


Image 12: Documents page displaying document types and transmission buttons.

14. After clicking the **Don't Transmit to eOPF** button, the documents are now in **Elected Not to Transmit** Status.

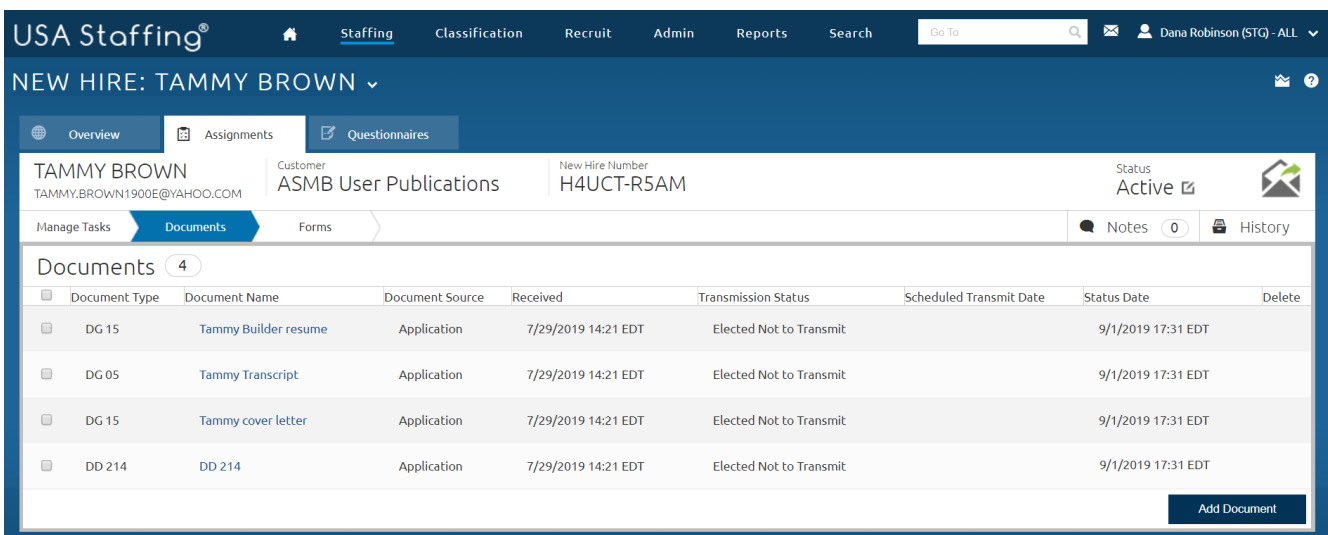


Image 13: Documents page displaying documents in Elected Not to Transmit status.



15. Next, open the Forms page.
  - a. Check the box next to each form that has a **Transmission Status** of *Ready to Transmit*.
  - b. Click the **Don't Transmit to eOPF** button (you do not need to take action on forms that have a **Transmission Status** of *Ineligible for Transmission*).

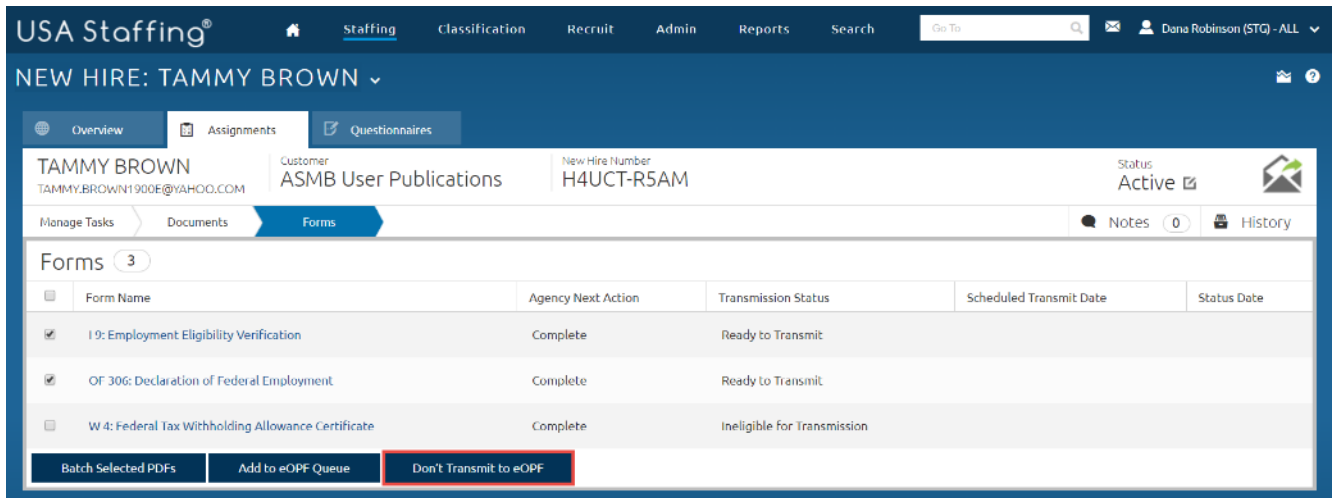


Image 14: Forms page displaying transmission buttons.

16. After clicking the **Don't Transmit to eOPF** button, the forms are now in **Elected Not to Transmit** Status.

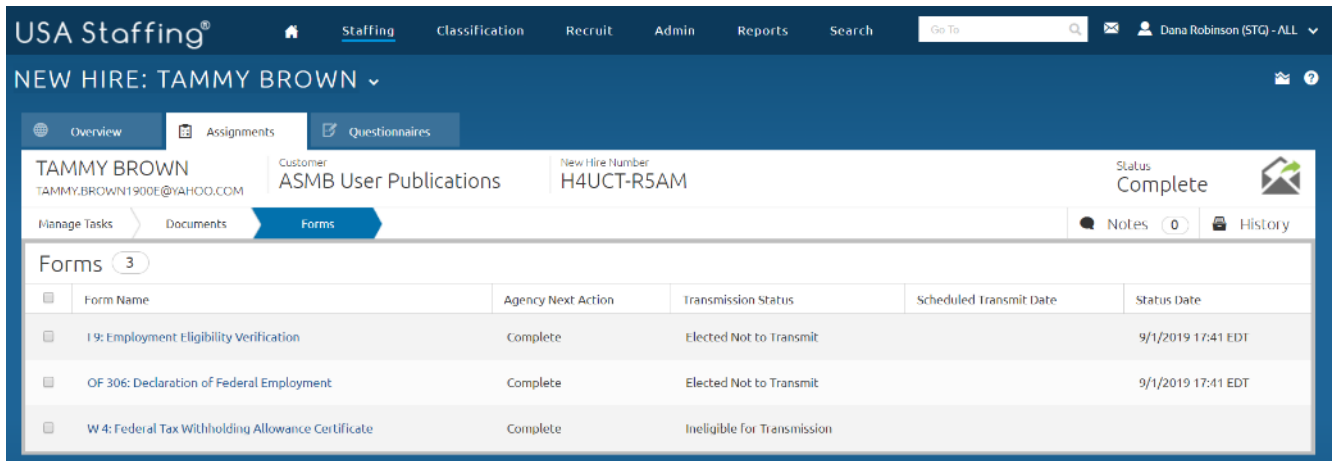


Image 15: Forms page displaying forms in Elected Not to Transmit status and Ineligible for Transmission status.

17. Navigate back to the Manage Tasks page and ensure the page is filtered to the Human Resources tasks. The **Transmit Documents to eOPF** and **Transmit Forms to eOPF** tasks now display today's date in the **Completed Date** column. Enter a completion date for any incomplete tasks. After all of the HR tasks are in complete status, the record has updated to **Complete** status.

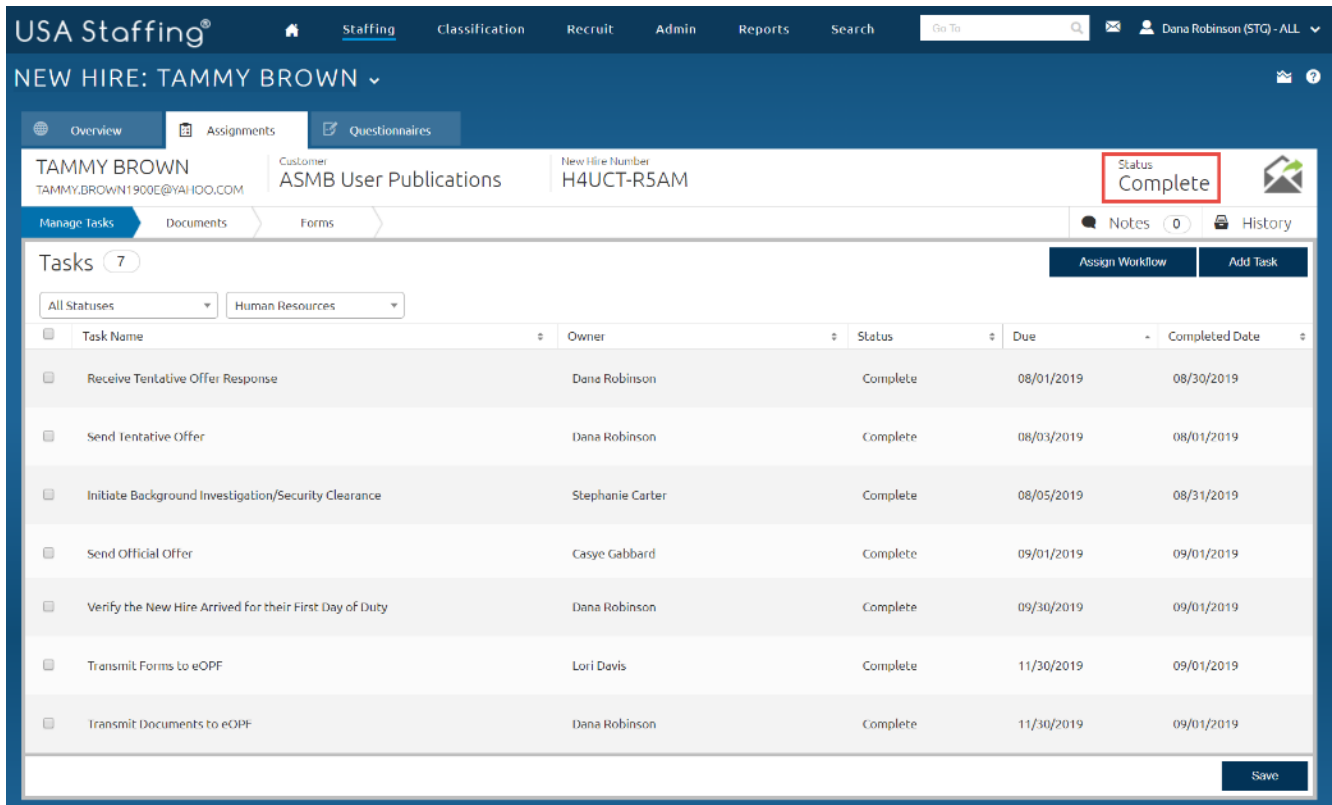


Image 16: Manage Tasks page displaying all Human Resources Tasks in Complete status, and the record status is Complete.

**This concludes the lesson on Completing the Record.**

## Notes for New Hire

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