



Onboarding Workgroup

Feb. 29, 2024



Agenda

- Recently Added Functionality
- Current & Upcoming Development Priorities
- Future Concepts & Design Work
- Open Questions/Demo
- Q&A

Testing 1-2-3, is this thing on?

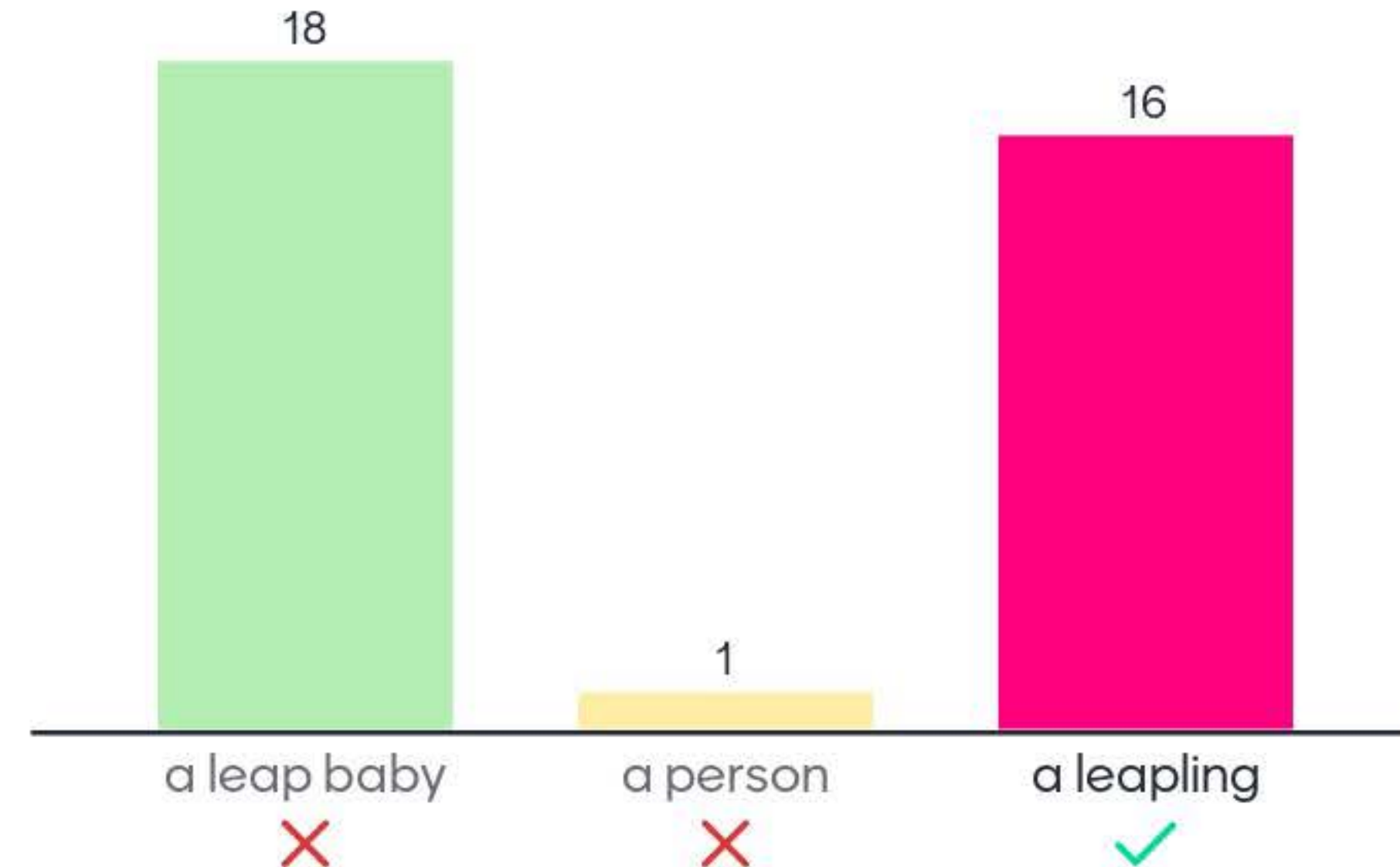
Go to Menti.com and enter code

9394 1218

Or scan this QR code with your phone



What are people who are born on Leap Day sometimes called?





Recently Added Functionality

- New Hire Activity Summary & Offer Reminder Email
- 2024 State Tax Forms

Share feedback

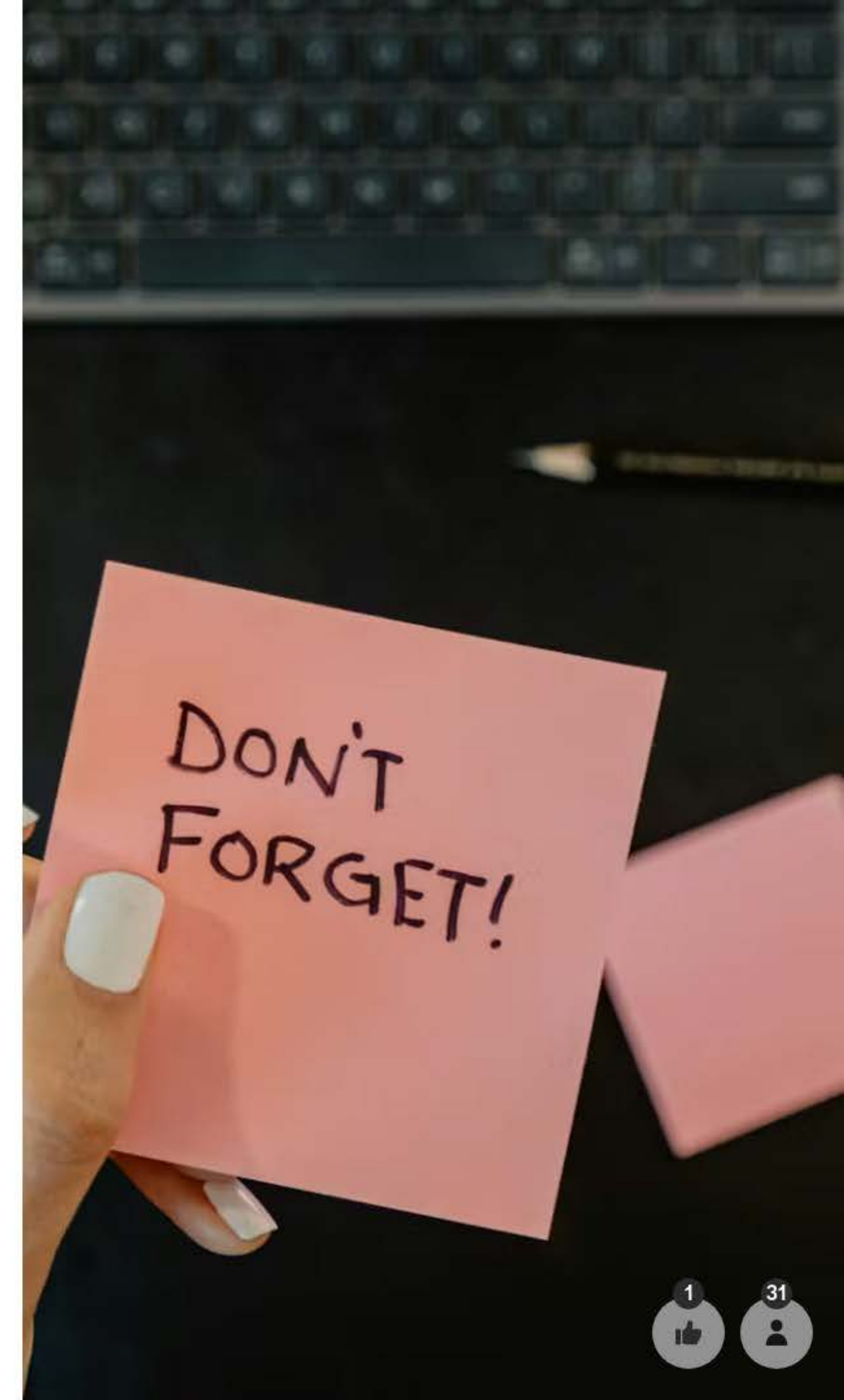
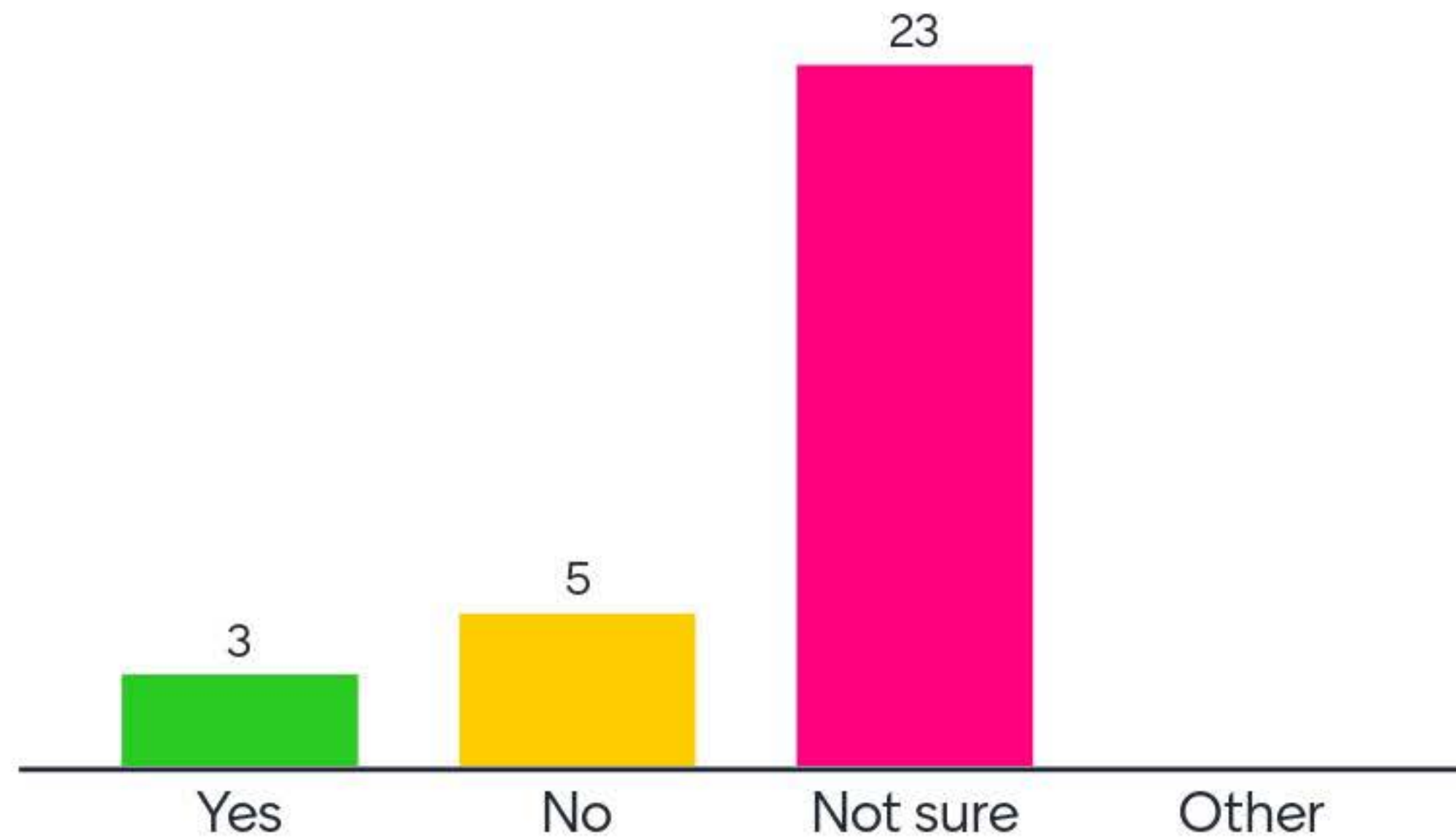
Go to [Menti.com](https://menti.com) and
enter code

9394 1218

Or scan this QR code
with your phone



Has your organization noticed any difference in new hires' response time to job offers since the "Pending Job Offer Reminder" email was implemented?



If you selected "Other," please share your other/additional feedback regarding the "Pending Job Offer Reminder" email.



What feedback has your organization received from new hires regarding their New Hire Activity Summary notifications?

don't know

Not sure

I have not hear any feedback, so assuming staffers aren't hearing any complaints from new hires

Some confusion. Receiving the summary after they submitted the information. Or they had multiple applications and were confused what application the summary was referencing.

Some organizations had us turn it off for their offices as new hires expressed their annoyance with the notifications.

More communication between the new hire and the staffer with the summary.

None from new hires

Appreciated the reminders

What feedback has your organization received from new hires regarding their New Hire Activity Summary notifications?

Have not heard any complaints.

Haven't heard negative or positive responses from staffers.

No complaints from NHs.

Has caused more communication/troubleshooting with New Hires on incomplete tasks.

Our agency has some new hire tasks that they may not complete based on their benefit selections, and then they get confused when it emails them that they have incomplete tasks.

Would prefer it was only once a week.

Would like if we could just have it sent once a week

It is very useful set of notifications. We needed to modify some custom tasks messages for NH to understand them better. And we needed to modify some of the workflow to align it better.

What feedback has your organization received from new hires regarding their New Hire Activity Summary notifications?

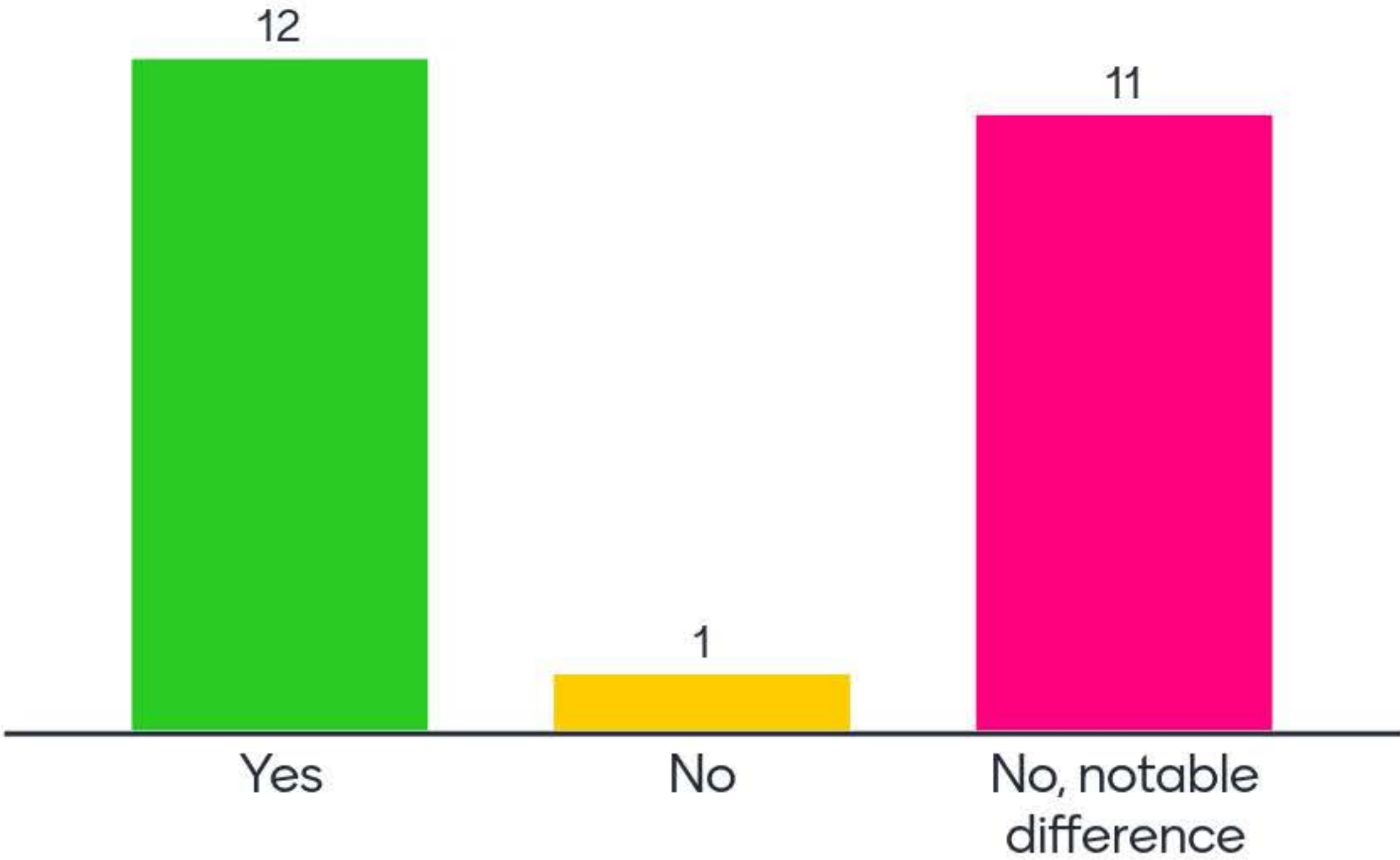
Allow for customers to determine when the reminder notification goes out. (choice of Monday thru Friday)



17



Are new hires completing their tasks more quickly since the New Hire Activity Summary notifications have been implemented?



2024 State Tax Forms

- **47** State Tax forms currently in Production.
 - Includes PR and a few states with multiple forms (regional)
- As of 2024, **11** states do not have state tax forms due to no state income tax and/or leveraging the W-4 for state taxes.
- **21** State Tax forms required updates for 2024 tax year.

Production Release 1/5/24

2024 W-4 updated

Production Release 2/2/24

12 tax forms updated:

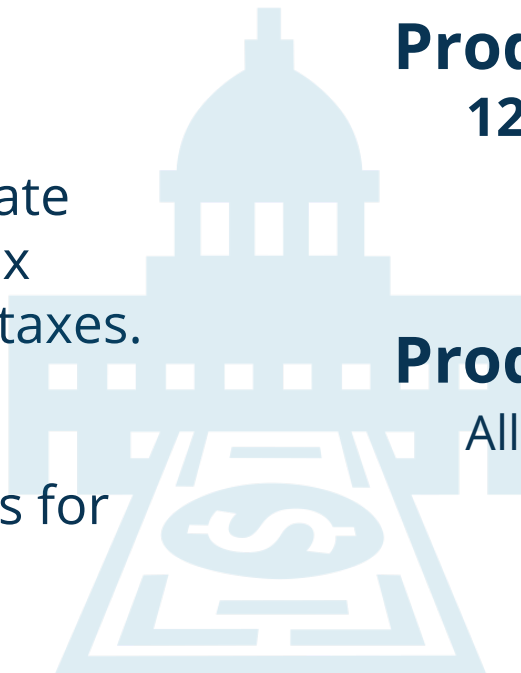
AZ, CT, GA, IA, IL, IN, KY, MN, MT, NY, WI, WV

Production Release 3/1/24



All **9** remaining tax forms will be updated:

CA, ID, MS, MT-ETM, NC, NY IT-2104E, OR, RI, SC





Current & Upcoming Development Priorities

- New Hire Header and Overview redesign
- Allow Custom Profiles on HR and Onboarding User Types to enable Reset Tasks Permission
- Add Pagination to the Tasks Dashboard tab

New Hire Header Redesign



Available on:

Stage 3/8/24

Production 3/29/24

NEW HIRE TAYLOR KELCE ▾

Overview | Assignments | Questionnaires

Email JESSICA.LINK@OPM.GOV	Position Title HR Specialist	Request # STEPHJQUERY-0026	Status Active	
New Hire # HNJ3E-3PCA	Pay Plan-Series-Grade GS-0201-11	Vacancy # 10034566		
Start Date 2/29/2024	Step 5	Announcement # DE-10034566-18-SC		
Customer Customer A	Office Central Office	Certificate # 20240215-BBBG-001		
			First Day of Duty Verify Arrival	Activity Summary

Data points added:

- Start Date
- Position Title
- PP-Series-Grade, Step
- Office
- Req #, Vacancy #, Annct #, Cert #
- Verify Arrival Button
- New Hire Activity Summary Toggle



New Hire Overview Redesign

Added

- PD Number
- Sensitivity & Risk
- Security Clearance
- Duty Location
- Salary
- Projected EOD Date
- Effective Date of Appointment

Directly access the Position Information Questionnaire using the icon next to Position Information section title.



Available on:

Stage 3/8/24

Production 3/29/24

Onboarding Information

Notification History

Data Transmission History

Documents 0

Notes 0

History

Summary

Offer Information

Invitation--

Tentative Offer

Accepted:2/15/2024

Login.gov/USAJOBS Usernamejessica.link@opm.gov

Official OfferNo Response

Position Information

Position Description #1234

Position Sensitivity and RiskNon-sensitive (NS)/Low Risk

Security ClearanceTop Secret

PCS Eligible

Duty LocationSaint Thomas, Virgin Islands, United States

Salary\$75,000

Projected Entrance-On-Duty Date02/29/2024

Effective Date of Appointment--

Other Information

Contacts

Supervisor/ManagerSteph Colon

Onboarding Process OwnerJessica Link

HR ContactsFollower GrayCarrie Dever

Benefits ContactsGeorge Bluth

Payroll ContactsKasey AcresDana Robinson

Additional ContactsHadi Rashid

Tags

New Hire TagsDirect-Hire Authority

9



Email JESSICA.LINK@OPM.GOV	Position Title HR Specialist	Request # STEPHJQUERY-0026	Status Active
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Start Date 2/29/2024	Step 5	Announcement # DE-10034566-18-SC	First Day of Duty
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Onboarding Information

Notification History

Data Transmission History

Documents 0

Notes 0

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Payroll ContactsKasey AcresDana Robinson

Additional ContactsHadi Rashid

Tags

New Hire TagsDirect-Hire Authority



Enable **Reset Tasks** Permission on Custom Permission Profiles

USA Staffing®

Home Staffing Classification Admin Reports Search New AdvancedSearch

Go To

Dana Robinson - OPM

ADMINISTRATION

Admin Home Permissions Admin Custom Reset Tasks Profile

Edit Permission Profile

Permission Profile Information History

Permission Profile Information

* = Required

Profile Name * Custom Reset Tasks Profile

User Type * Onboarding User

Profile Type Unpaid

Profile Description

Office * Washington Services Branch

Tags Philadelphia Services Branch Washington Services Branch

Section	
New Hires	
<input checked="" type="checkbox"/> View Tasks	Enables user to view the list of tasks assigned to a new hire.
<input checked="" type="checkbox"/> Add Tasks	Enables user to assign tasks to a new hire.
<input checked="" type="checkbox"/> Delete Tasks	Enables user to remove tasks from a new hire record.
<input checked="" type="checkbox"/> Edit Task Details	Enables user to edit tasks within a new hire record.
<input checked="" type="checkbox"/> Reset Tasks	Enables user to reset Verify the New Hire Arrived for their First Day of Duty task.

Reset Tasks Permission

HR and Onboarding Users assigned a profile with this permission enabled can reset tasks (i.e. Verify the New Hire Arrived for their First Day of Duty task).

USA Staffing®

Staffing Classification Admin Reports Search New AdvancedSearch

Go To

Dana Robinson - OPM

NEW HIRE TEST ACCOUNT

Overview Assignments Questionnaires Verify the New Hire Arrived for their First Day of Duty

Email: TUTKING711@GMAIL.COM
New Hire #: HTBYQ-16OT
Start Date: 2/27/2024

Position Title: Testing
Pay Plan-Series-Grade: GS-0201-14
Customer: Customer G
Office: San Francisco Services Branch

Request #: 20231128-26534

Status: Active

First Day of Duty: Arrival Verified by Carrie Dever (Impersonating Carrie Testing), 2/27/2024 09:43:42

Activity Summary

Task Details

Documents 0 Notes 0 History

Due Date	Task Name	Active Date	Activating Task	Task Status
12/12/2023	Verify the New Hire Arrived for their First Day of Duty			Complete

Task Instructions

Confirm the date the new hire first reported to duty. Note: This date is extremely important, as it is required before you are allowed to add forms or documents to the eOPF transmission queue.

Completion Date

02/27/2024

Reset Task Save



Pagination – Tasks Dashboard

Users will be able to..

- View the pagination bar while scrolling
- Select number of tasks to show on page (50,100,200)
- See a current page indicator
- Navigate to pages using arrows forward and back, first and last or clicking on page
- Type in page number with “Go to page” and select “Go”

The screenshot displays the 'Tasks (427)' dashboard. A table lists tasks with columns: Task, Vacancy Number, Request Number, Status, Task Owner, Due, Created, and Favorite. The first two rows are visible, showing tasks with IDs 10000013 and 10000016. Below the table, a yellow arrow points to the 'Number of tasks per page' dropdown menu, which is currently set to 100. The dropdown menu is open, showing options 50, 100 (highlighted), and 200. To the right, a yellow box highlights the pagination bar, which includes '1 of 1002 pages', navigation arrows, page numbers 1 through 4 (with 1 highlighted), and a 'Go to page:' input field with a 'Go' button.

Task	Vacancy Number	Request Number	Status	Task Owner	Due	Created	Favorite
Complete Assessment Package 10000013	10000013	20140918-68566	Active		9/23/2014	9/18/2014	☆
Complete Assessment Package 10000016	10000016	20140919-83765	Active		9/24/2014	9/19/2014	☆
Complete Assessment Package 10000049	10000049	20140924-62874	Active		9/29/2014	9/24/2014	☆
Complete Assessment Package 10000013	10000013	20140918-68566	Active		9/23/2014	9/18/2014	☆



Future Concepts & Design Work

- Request for new "Service Line" Field
- Usability testing for Task Result functionality
- Multi-selection on Tasks and New Hire dashboard tabs
- Input Verification Validator Field

Request for a “Service Line” Field

- Users requested a new **Department Descriptor/Service Line field** to:
 - Easily assign Requests to appropriate HR User and staff
 - Use the field as a filter on the Request dashboard for workload management purposes
 - Be transmitted from USA Staffing via RPI as part of a new Request
 - Be visible in a New Hire record
 - Be available in the HM Interface
 - Be available for reporting (i.e., show me all active recruitments for Mental Health)
- **Previously considered repurposing the Activity/Unit field** to be used for this purpose, **but after analysis** have determined the best way forward is to **create a new field**.

The new field will be:

- Optionally assigned to a Request
- Accepted via RPI as part of Request creation
- Available for HR to update in the Request as needed until approval
- Populated in the New Hire record associated with the Request
- Forced selection from a drop-down list of defined values (i.e., not free-form text, nor customizable at the Request or New hire levels)

REQUEST 20231213-87147

Request Number: 20231213-87147 | Customer: Customer A | Request Type: New Vacancy | Status: Incomplete

Request Information | Location Information | Staffing Approach

Documents: 0 | Notes: 0 | History

Request Information * = Required

Request Number * | Request Customer * | Request Type * | Requester *

Generate

Service Line/ Area | Request Process Owner | Request Tags

NEW HIRE IVANETE ABAL

Overview | Assignments | Questionnaires | Position Information

IVANETE ABAL | Customer: Customer A | New Hire Number: HNHSO-4X4Q | Status: Active

Employer | Position | Entry On Duty | Security Clearance

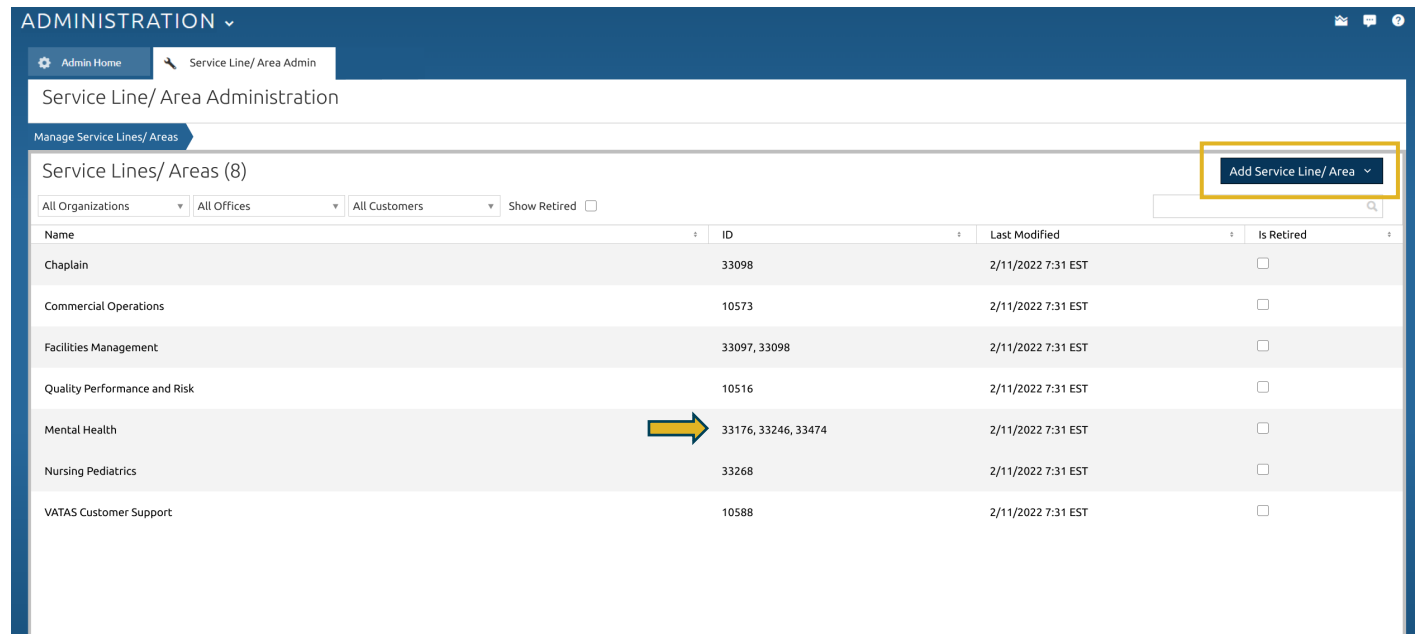
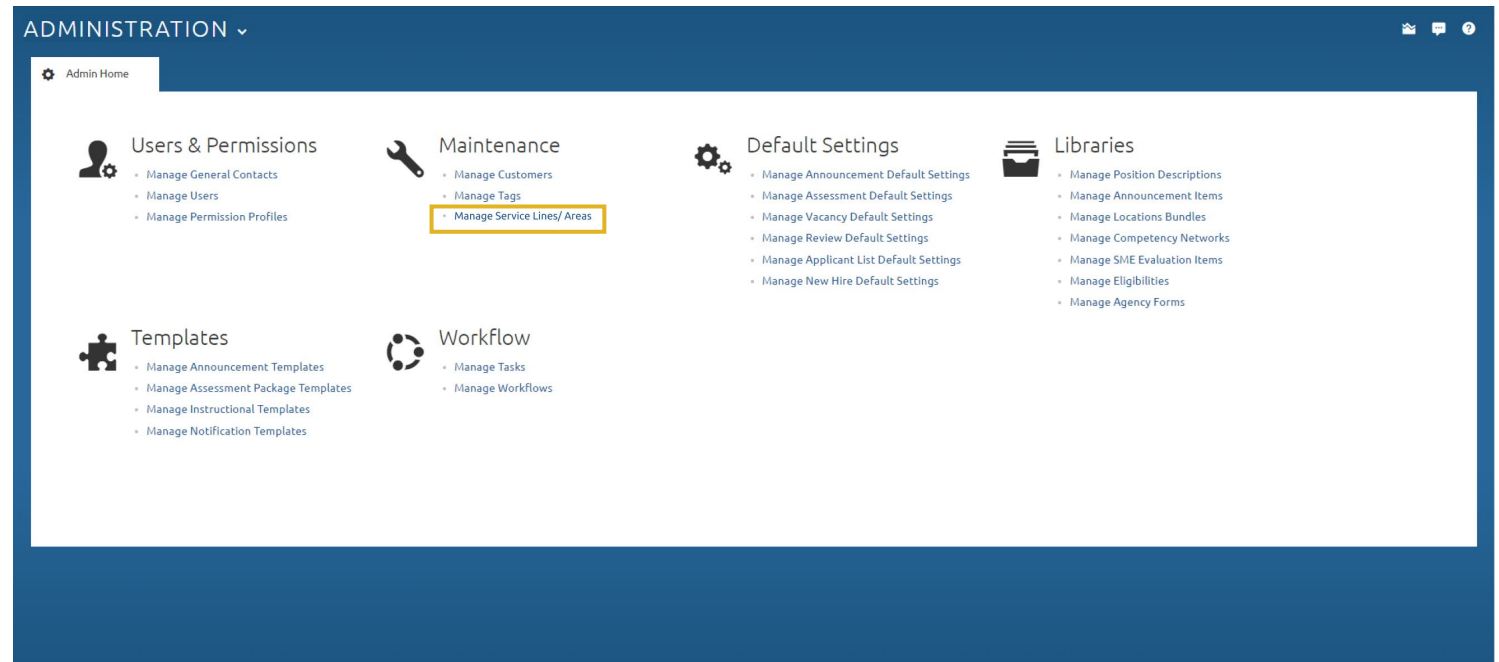
Agency/Department * | Bureau/Division | Branch/Organization | Service Line/ Area | Activity/Unit | Agency/Department Address Line 1 * | Agency/Department Address Line 2 | Agency/Department Address Line 3 | Agency/Department City *

Test Agency | Blank Bureau | Cool Branch | Commercial Operations | Super Unit | 1900 E St NW | | | Washington

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

Management of the new field

- Users with Admin permissions will manage their library
- Each record will be associated with Organization(s), Office(s) and (Customers)
- Each record may be associated with multiple IDs
- Search/filter options will be available in the library



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

What should we label this new field?

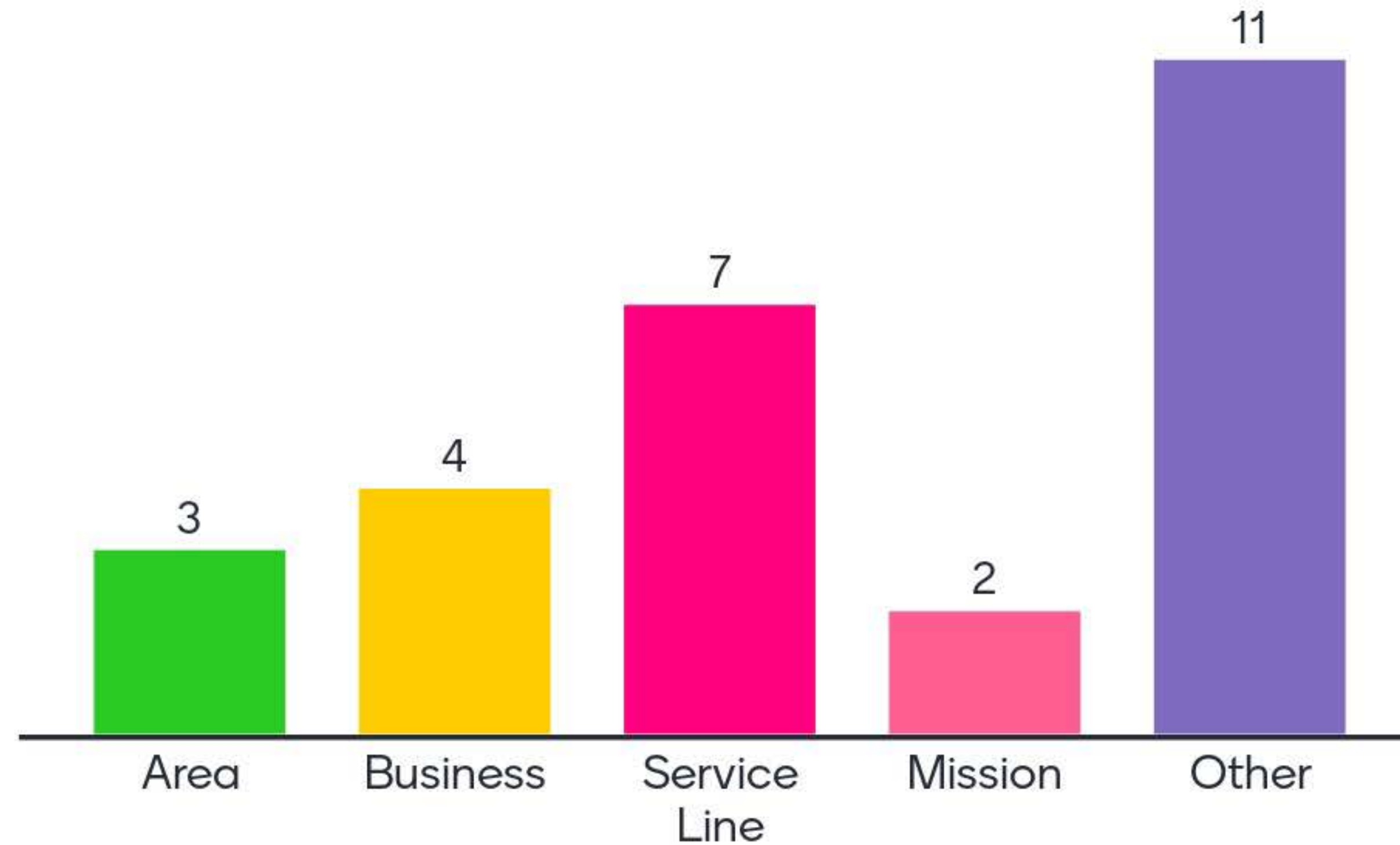
Go to Menti.com and enter code

9394 1218

Or scan this QR code with your phone



What should we label this new field?



If you selected "other" in the previous question, what would you label the field?

Career Field

functionality

Custom Identifier

Group

SF-52 # or Request
Number

Career

Perhaps "Sub
organization" or similar

Request Number

If you selected "other" in the previous question, what would you label the field?

Customer identifier	Functionality	Sub-Unit	Unit
Directorate	Business Line	Mission Area	External or Internal Applicant

If you selected "other" in the previous question, what would you label the field?

Sub-Unit or Sub-Activity

Mission Function

Please don't use anything
that sounds like an existing
field in USAS



Task Result Field Usability Test

Feedback:

Users are neglecting to update the Task Result field in the task details page due to a lack of clarity regarding its necessity.

Tests Conducted:

Investigated current user behavior regarding the Task Result field.

Findings:

- Users frequently update task items directly from the dashboard, avoiding deeper exploration.
- A significant portion of users are unaware of the existence of the Task Details page.
- Users who do find the page perceive it as confusing and difficult to comprehend.

Solutions to consider:

- Implement a confirmation modal to facilitate additional task detail updates during status changes on the Tasks Dashboard tab.
- Restructure the Task Details page for improved readability and clarity.

10

10000016

10000016

20140919-83765

Active

Tadiwa Mangadze

9/24/2014

Task: Task 3000

×

Update or Confirm the following to Complete Task:

Completion Date

Select Completion Date

Calendar icon

Date will default to today if not selected

Task Result

Select A Task Result

Dropdown arrow

Result cannot be updated after Task is complete

Confirm

Cancel

10000016

10000016

20140919-83765

Active

Unassigned

9/24/2014

Task Details Page Redesign

Overview

Assignments

Questionnaires

Employment Information (DNM)

Biographic Information (DNM)

Initiate Background Investigation/Security Clearance

APPLICANT 100 + CTAP
TEST100CTAP@OPM.GOV

Customer
Customer A

New Hire Number
HH779-FZQ5

Status
Active

Task Details

Documents 6

Notes 1

History

Due Date

Task Name
Initiate Background Investigation/Security Clearance

Active Date

Activating Task

Task Status
Active

Task Instructions

Access eQIP and initiate a background investigation for this new hire. Once the action is complete, you must manually enter a completion date for this task.

Completion Date

Task Result
No Result Entered

Task Definition ID
5

Overview

Assignments

Questionnaires

Position Information

Confirm Physical Exam Completion

JOHNNIE AARNS
AARNS.JOHNIE@MAILINATOR.COM

Customer
Customer A

New Hire Number
HKD4K-AD3X

Status
Active

Task Details

Documents 0

Notes 0

History

Task Information

Task Progress

Name
Confirm Physical Exam Completion

Owner
Carrie Dever

Definition ID
11092

Activating Task
Complete Physical Exam

Active Date

Due Date
08/28/2023

Instructions

Status
Pending

Completion Date

Result
Select A Result

Last updated by Sam Fernandez, 11/23/2023 13:59:02

Save

Side Drawer with Multi-Select Filters on dashboard tabs

Need:

Users want the ability to filter using various inputs of the same fields simultaneously, strengthening our filters. However, each new feature added to the dashboard, especially this one, demands additional real estate.

Solution:

- Move filters into a side drawer: This frees up space on the dashboard.
- Implement Multi-select filters: Allow users to select multiple options within a single filter category simultaneously.

Advantages:

- Scalability: The side drawer provides ample real estate for future additions and enhancements.
- Better Organization: Filters can be themed for easier access, enhancing user navigation and efficiency.

Design

DASHBOARD ▾

Welcome

Tasks

Requests

Vacancies

New Hires

New Hires (1005)

Filters (9) Clear Filters

<input type="checkbox"/>	Name	Customer	Onboarding Process Owner	Status	Start Date	Active Tasks	Logged In	Favorite
<input type="checkbox"/>	New Hire 1	Customer A	Tadiwa Mangadze ▾	Active	9/24/2014	6	No 1	☆
<input type="checkbox"/>	New Hire 1	Customer A	Unassigned ▾	Active	—	3	No 1	☆
<input type="checkbox"/>	New Hire 1	Customer A	Unassigned ▾	Active	—	1	No 1	★
<input type="checkbox"/>	New Hire 1	Customer A	Jordan Chen ▾	Active	—	3	No 1	☆
<input type="checkbox"/>	New Hire 1	Customer A	Unassigned ▾	Active	—	1	No 1	★
<input type="checkbox"/>	New Hire 1	Customer A	Unassigned ▾	Active	9/24/2014	1	No 1	★
<input type="checkbox"/>	New Hire 1	Customer A	Unassigned ▾	Active	—	1	No 1	★
<input type="checkbox"/>	New Hire 1	Customer A	Unassigned ▾	Active	—	1	No 1	★
<input type="checkbox"/>	New Hire 1	Customer A	Unassigned ▾	Active	—	1	No 1	★
<input type="checkbox"/>	New Hire 1	Customer A	Unassigned ▾	Active	—	1	No 1	★
<input type="checkbox"/>	New Hire 1	Customer A	Unassigned ▾	Active	—	1	No 1	★
<input type="checkbox"/>	New Hire 1	Customer A	Unassigned ▾	Active	—	1	No 1	★
<input type="checkbox"/>	New Hire 1	Customer A	Unassigned ▾	Active	—	1	No 1	★
<input type="checkbox"/>	New Hire 1	Customer A	Unassigned ▾	Active	—	1	No 1	★

New Hires Filters (0) ✕

Keywords

New Hire Name, Email, Number or Start Date

* Pre-filled using your latest or default filters

New Hire Information

* Status

Active ▾

New Hire Logged In

All New Hire Logged Ins ▾

Invitation/ Offer Response

× Response 1 × Response 2 ▾

Position Information

Customer, Office, PCS Eligibility

Process Information

* Onboarding Process Owner

× Tadiwa Mangadze
tadiwa.mangadze@va.gov ▾

New Hires Filters (0) ✕

Keywords

New Hire Name, Email, Number or Start Date

New Hire Information

Status, New Hire Logged In, Invitation/ Offer Response

Position Information

Customer, Office, PCS Eligibility

Process Information

Onboarding Process Owner, Form Status, eOPF
Transmission Status, Date Milestones

Input Verification Validator Field

Objective:

Enhance the accuracy of information provided by New Hires (NHs) by implementing verification for critical inputs such as SSN and email address.

Implementation:

Introducing an "input verification field" requiring users to re-enter data, which is then compared to the initial entry for accuracy. A match results in success, while a mismatch is flagged as an error.

Scope:

Initially implemented in the New Hire Questionnaire, with potential application to other areas of the HR Questionnaire in the future.

The diagram illustrates the input verification process for a Social Security Number (SSN) through three sequential stages:

- Initial Entry:** A form titled "Social Security Number" with a red asterisk. The input field contains "123-456-787". To its right is an empty field labeled "Re-enter Social Security Number". Below these is a label "Enter any other names you may have gone by (including maiden name)." with an empty input field.
- Mismatch Error:** A yellow arrow points to a second form where the "Re-enter Social Security Number" field contains "123-4". Below the field, the text "Entry does not match" is displayed in red.
- Match Success:** A yellow arrow points to a third form where the "Re-enter Social Security Number" field contains "123-456-789". Below the field, the text "Entry is a match" is displayed in green.



Open Questions

- What questions do you have for the USA Staffing team?
- Is there anything you'd like to see?



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

Resource Change: Selective Service Interconnection FAQ

- We moved content from the standalone FAQ document to a new area of Online Help
- The link from the Advisory Board and End User Resource Centers will now take you directly to Online Help

**Onboarding & New Hire**

USA Staffing New Hire Online Help

- EOD Requirements and System Certification (February 2021)
- EOD System Certification Worksheet (February 2021)
- eOPF Error Code Descriptions (June 2021)
- eOPF System Certification SOP (February 2021)
- Onboarding Forms Available List (February 2024)
- Onboarding Frequently Asked Questions (December 2023)
- Request for New or Updated Onboarding Form (January 2024)
- **Selective Service System Interconnection Frequently Asked Questions**

New Hire & Onboarding Resources

- [New Hire Online Help - New](#)
- [eOPF Transmission Error Code Descriptions - Updated June 2021](#)
- [Onboarding Forms Available List February 2024](#)
- [Onboarding Frequently Asked Questions December 2023](#)
- **[Selective Service System Interconnection Frequently Asked Questions](#)**



USA Staffing®

HELP

Selective Service System Interconnection Frequently Asked Questions

Frequently Asked Questions

Clicking the expand button will allow you to view the frequently asked questions and the answers.

System Functionality

Verify Selective Service System Registration task [Expand]

Interconnection [Expand]

OF-306 [Expand]

Regulations

Registration Requirements [Expand]

Registration Determination [Expand]

Summary of Verify Selective Service System Registration Task Results and Recommended Actions

Verify Selective Service System Registration task Result Responses and next steps [Collapse]

USAS Task Result	Verify Selective Service System Registration Task Note	Consideration(s)	Next Step(s)
Pending	N/A - Wait for the interconnection to return results.	N/A - Wait for the interconnection to return results.	Wait for the interconnection to return results.
Verified	Selective Service System Note: SelectiveServiceNumber: XXXX; AccessionDate: XX/XX/XXXX Registration has been verified; however, the Social Security Account Number submitted matched more than one record in the Selective Service System.	N/A - The Task is now in a 'Complete' state.	N/A - The Task is now in a 'Complete' state.
Not Verified	Selective Service System Note: Based on the information submitted (e.g., last name, date of birth and SSN), a registration record cannot be found for	Confirm the new hire's DOB, SSN and last name used to register are correct; or if eligible, work with the new hire to register. Obtain registration information or prior exemption/determination from the new hire.	After the New Hire registers, as applicable, return the OF-306 for correction. Once corrected and re-submitted, the interconnection will trigger again. Follow agency policy to upload documentation to the new hire record and set Task Result to 'Manually Verified'. The Task will update to a status of 'Complete'.

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

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.

USA Staffing Onboarding Workgroup

February 29, 2024

Questions and Answers

New Hire Header & Overview Redesign

1. **Can the "Verify Arrival" button be inactive when the date is prior to the EOD set in the system?**
 - a. Not all customers use the Entrance-On-Duty Date field in the questionnaire, so we'd have to think very carefully about this restriction. In the new design, the button will be disabled if: (a) the new hire record is in a cancelled status, (b) the new hire record does not have a request number tied to it, or (c) if the user does not have permission to Verify New Hires Arrived for First Day of Duty. In these cases, the user can hover over the disabled button which will present a tooltip explaining why the button is disabled.

Request for a "Service Line" Field

1. **"Each record may be associated with multiple IDs"- can you elaborate on this more/explain more. What do you mean by ID?**
 - a. The ID would be an alphanumeric number associated with the label in assist in different systems referencing the same thing. It's more likely to be relevant for agencies who are using an interconnected system to feed the data. It assumes the list of fields lives somewhere outside of USA Staffing.
2. **Could the field be named in the admin area for each organization?**
 - a. Unfortunately, this is not an option due to the impact on running reports on the field.

Miscellaneous

1. **Is it possible/ does it exist to send an auto email like the New Hire Activity Summary to have people reactive their record/ warn them of upcoming inactivation?**
 - a. This currently does not exist but thank you for the suggestion. If this is something your agency would like to see, please contact your Account Manager.
2. **Would it be an option to create a new hire task that is strictly instructional so that it won't tell them something is incomplete when the task is designed to be instructional/optional?**
 - a. This would be a good use case to dive into more and discuss with your Account Manager.
3. **Are there any plans to reduce "time to automate forms"?**
 - a. Now that the tax form season is over, we can get back to work on our "regular" forms backlog. The time it takes to develop forms depends heavily on the amount of new form requests and form update requests submitted by all the agencies we service. It can fluctuate at any given time therefore the wait may be longer or shorter at times.
4. **As New Hires complete tasks does HR receive an email notification that the task is complete?**
 - a. If the task is a form review task, the onboarding process owner receives an in-system alert when a new hire submits a form. The Forms submission is also included in the HR Activity Summary if the onboarding process owner is signed up to receive those emails.