USA Staffing Upgrade

Stage Release Notes

Release 9.5

July 6, 2018

Introduction

OPM employs agile IT development techniques in the development and maintenance of the USA Staffing Upgrade system. This means we have the ability to update priorities through frequent, iterative releases based on changes in the hiring landscape or the identified needs of the collective customer base.

The USA Staffing Upgrade Release Notes provide an overview of the most recent functionality deployed to the USA Staffing Stage and Production environments.

To learn more about features that already exist in USA Staffing Upgrade and to review the upcoming release schedule for the USA Staffing Upgrade Stage and Production environments, please visit USA Staffing Upgrade Resource Center.

Completed System Functionality

The items outlined in this section include newly added functionality in the USA Staffing Upgrade. Examples of functionality found in this section can range from corrected issues within the system, changes that enhance the system's performance, enhancements made to the user experience specific to existing features based on feedback received, or new functionality that improves the system's already robust set of capabilities. As you review this section, you may see the following icon ✅ which designates the completion of feature that was previously identified in the Feature Backlog & Glossary on the USA Staffing Upgrade Resource Center.

Staffing Functionality

- Added a new "Welcome" tab to the HR and Onboarding User Dashboard o This tab will allow each user to add up to six "Tiles" to their personal dashboard. Tiles may be added by clicking the + sign and selecting the desired Tile from the library. They may be removed by clicking the X in the upper right hand corner. ✅ o At this time, there are four Tiles available for selection:

  - ✦ Recent Alerts: Displays the last ten alerts sent to the logged in user.
  - ✦ Task Totals: Shows the counts of active tasks due in the last 60 days, active unassigned tasks, and active unassigned Review Request tasks.
  - ✦ Upcoming Applicant List Reviews: Displays the applicant list reviews owned by the logged in user due over the next five days (includes current day).
  - ✦ Upcoming Tasks: Displays tasks owned by the logged in user due over the next five days (includes current day).

  o The USA Staffing Program Office would like to engage customers in discussions around requirements for future Tiles. Please provide any thoughts you may have to your Account Manager.

  o While the Welcome tab will be released to the Stage environment, the Program Office plans to possibly delay the release to the Production environment for at least one deployment cycle. The actual release date to Production will be determined by the feedback we receive from you.

- Refined Owner filter on the New Hire Dashboard to only list users that are assigned to an Office (Human Resources user type) or Customer (Onboarding user type) to which the user has permission.

- Updated Staffing Tasks to update the displayed due date based on the completion of the activating task defined in the assigned workflow. ✅
    - For example: Task B will become active when Task A is completed, provided Task A is set as the activating (predecessor) task for Task B. Task Workflow settings updates aligned with this change are addressed in the Administration section below.
    - All existing workflows can still be assigned without changes and the tasks will automatically activate and complete per the [Tasks Status and Triggers](#) document on the Resource Center. However, the Due Date calculated by the system will all be based on the date the workflow is assigned, unless the custom workflows are updated. ○ Only updated workflows assigned after this release will apply these changes to the task triggers and due date assignments. ○ All System Staffing Workflow Templates will be updated with this release to apply the task triggers and due date assignments.
- Added several new optional checkbox fields to the Position Settings section of the Request Information subpage. These fields are available for use for all request types and by HR and Onboarding users. They have not yet been added to the Hiring Manager user screens. ○ Drug Testing Required ○ Telework Eligible ○ Relocation Authorized ○ Financial Disclosure Required ○

    Bargaining Unit Position

- Enhanced the approval process for an Onboard New Hire request where files associated with the request will be automatically populated in the Documents section of the New Hire record. All documents added to the New Hire record will be converted to PDF as part of that process.
- Updated the Request Status Generator to move Requests in a status of Pending Recruitment to Selection Made when they are added to a Selected/Hired audit in a Certificate. There are a few instances where a Request may not move from Pending Recruitment to Active Recruitment when a Vacancy officially becomes Active. While we work to fix those instances, this update will ensure all Requests move to the Selection Made status when tied to a selectee. This should eliminate the need to contact the USA Staffing Help Desk when the Request Status remains stuck in Pending Recruitment status.
- Added several new optional checkbox fields to the Position Settings section of the Vacancy's Position Information sub-page. They are pre-populated based on the settings in the New Vacancy Request that generates the vacancy but they may be updated in the Vacancy at any time. ○ Drug Testing Required ○ Telework Eligible ○ Financial Disclosure Required ○ Bargaining Unit Position
- Made several improvements to the Vacancy's Settings page:
    - Locked down the Age Screen section to editing following the Announcement opening on USAJOBS. Changes to this section can cause problems with the application and the consistency of applicant ratings.
    - Reduced the area around a checkbox, radio button entry option that a user can click to select that option. Users could previously click blank sections near an item on the page and the page would interpret that as

selecting that item. We have reduced the clickable area so now the user must now click directly on the checkbox/ radio button or associated text to change the selection.

- o When an ACWA assessment is added to a vacancy, the following will automatically occur:

  - ✦ The "Override individual announcement and assessment question requirement indicators to set all questionnaire items as required" control in the Application Processing section will be disabled. The ACWA rating assessment instructs applicants to skip questions that don't apply to them, so this setting cannot be enabled.

  - ✦ Add the "ACWA" Appointing Authority tag to the Vacancy Tags section.

  - ✦ Check the "Administrative Careers with America (ACWA) position - Do not archive" option in the Case File Retention section.

- Updated the Announcement Text sub-page to account for four new fields made available for the Job Opportunity Announcement by USAJOBS: o Drug Test Required

  - ✦ Value displayed in the Position Information section.

  - ✦ Value established in the Position Settings section of the Vacancy's Position Information sub-page.

  - o Telework Eligible

    - ✦ Value displayed in the Locations section.

    - ✦ Value established in the Position Settings section of the Vacancy's Position Information sub-page.

  - o Service Type:

    - ✦ Value displayed in the Overview section.

    - ✦ Values of Competitive, Excepted, and Senior Executive are established based on the following business logic:

- If the Pay Plan is ES then Service Type is set to "Senior Executive."

- If the Pay Plan is not ES and the Appointing Authority tag field on Vacancy Settings has an assigned tag of "Excepted Service", then Service Type is set to "Excepted Service." • If neither of the above are true, then Service Type is set to "Competitive." o

  Promotion Potential Clarification Text:

  - ✦ Optional text field available next to the Promotion Potential value in the Duties section.

  - ✦ Available to more clearly define the Promotion Potential value. ✦ Up to 250 characters of text allowed.

- The Announcement PDF has been updated to display the values for Drug Test Required, Telework Eligible, Service Type, and Promotion Potential Clarification Text.

- Fixed an Announcement release validation bug that prevented releasing of announcements with grades containing alpha characters; for example, AA.

- Added a Search button on the Applicant Overview page. Users will now have to click the Search button after entering search terms for the applicant list. The previous functionality of automatically filtering the list based on each keystroke within the search criteria is known to have caused serious performance degradation in the Applicant Overview page.

- Added the following ineligible NOR message:
  - IOPA: "Your application is pending completion of the required external assessment(s), and your test results will be uploaded upon completion."

- Created a new System Alert where the Internal Contact for an Announcement will be notified when every Applicant who has claimed Reasonable Accommodation for their USA Hire assessments has been adjudicated for that claim. This should allow Announcement Internal Contacts to be confident that all Reasonable Accommodation Adjudications have been made and that Certificates may be created.

- Added a Create List button to the top of the Certificate List. This button will allow a user that has just issued a certificate to immediately create a new list directly from the Certificate List rather than forcing them to return to the Applicant Overview page to create a new Applicant List.

- Enhanced the "Add Reviewer" selection screen when assigning reviewers to a Review. These enhancements include: o Assigning search parameters to more clearly define the list of potential reviewers to display for selection.

    The available search criteria includes: Customer, User Type, First Name, Last Name, and Email Address. Only customers associated with the vacancy will be available for searching.
  - Added pagination so only 25 rows are listed at once. Reviewers may be selected across pages without closing the popup window.
  - Displaying an indicator if a listed user has already been assigned to the Review to make it easier to keep track of who has already been added across multiple pages.

- Updated the standard email language generated upon the issuance, return, and recall of a Review.
  - Consistent display of Review Name and Request Number in the email Subject Line (unless there are multiple Requests attached to the Review).
  - Review Issuance email will include: Review Type, Review Name, Due Date, Vacancy Number, Position Title/Pay Plan/Series/Grade(s), Request Number(s), Link to view review package (except for followers), and Review Owners contact information.
  - Review Return email will include: Review Type, Review Name, Due Date, Vacancy Number, Position Title/Pay Plan/Series/Grade(s), Request Number(s), Link to view review package (except for reviewers and followers), and Review Owners contact information.

- Review Recall email will include: Review Type, Review Name, Due Date, Vacancy Number, Position Title/Pay Plan/Series/Grade(s), Request Number(s), Recall Reason, and Review Owners contact information.

- Updated the HR view of the issued Certificate to display all claimed or successfully adjudicated Eligibilities for each certified applicant as a column. The Eligibilities displayed on the Certificate are the values captured at the time of Certificate issuance and may not be edited.

- Enabled the ability to mass audit applicants on a Certificate to a combination of either Audit Code "Selected" or "Alternate Selection" and a Return Status of "Vetting." This will allow agencies that choose to begin the vetting process for a large number of applicants with a single user action. Creating of new hires for the audited applicants will occur in the background and the user initiating the transaction will be notified with a summary of how many new hire records were created successfully and how many failed. ✅

- Enabled the sending of New Hire Invitations, Tentative Offer Letters, or Custom Communications to multiple New Hire records at once through the use of the Apply Action button on the Certificate. USA Staffing will alert users sending these notifications if the associated New Hire record had already received the notification. The system will also prevent the sending of Onboarding related notifications if the applicants selected from the certificate are not in a Selected/Hired, Selected/Vetting, or Alternate Selection/Vetting status. Note that users will not have the ability to edit content in the selected notification template so be careful about the use of placeholder text or data inserts, populating data input into a new hire record after it has been created, in any templates you intend to use for this functionality.

- Made two usability updates to the Reset Password functionality that should reduce user errors when resetting USA Staffing passwords: ○ Changed the reset password URL to make it easier to copy and paste into a browser without errors. This should provide some relief to users whose email systems strip URLs out of incoming emails.

  - Automatically move the user back to the standard Login page following the request of a password reset. Users were bookmarking the Reset Password page instead of the Login page, causing them to believe that they needed to reset their password every time they logged in to USA Staffing.

Onboarding Functionality

- Added the following forms for use in USA Staffing: ○ CBPHC 3-1, DHS 11000-9, SOU Ordinary Resident, COE CDL, ELTY

  6325, FLU ○ VA Employment Information Form

- Updated the following forms currently in use in USA Staffing:

  - OF 306, VA 710, SF 813, DOJ CD Disclosure, SECNAV 5512 ○ Tax forms

  for North Carolina

- Updated the Summary section of the New Hire Overview page to display the Selectee's response to an Invitation to Onboard.

- Updated the Documents and Forms sub-pages of the New Hire record to display of the buttons that allow the transmission to eOPF of one or more selected forms or documents in a consistent manner. The buttons will only display after the new hire has reported for duty and HR has completed the Verify the New Hire Arrived for their First Day of Duty task.

- Removed the references to the Month and Day of Birth from the New Hire invitation and job offer response pages. New Hires will no longer be asked to provide the Month and Date of birth as a means to validate their identity when receiving an Invitation, Tentative Offer or Official Offer notification.

- Provide warning messages to New Hires when they navigate away from a section of their New Hire Questionnaire without answering all of the required questions.

- Provided a warning to users copying and pasting a previously sent Tentative or Official Job Offer letter into a new notification where the user is inadvertently copying the previous New Hire's unique login link.

Hiring Manager Functionality

- The Announcement Text portion of the Job Opportunity Announcement Review Type has been updated to display the values for Drug Test Required, Telework Eligible, Service Type, and Promotion Potential Clarification Text that are now available on the Announcement Text page. ## Administrative Functionality

- Updated the Workflow Activities sub-page in an individual Staffing Workflow Template to the following:

  o Show the number of rules applied to each Staffing task and view the list of the assigned rules.

  o Allow the adding, removing, or updating of Staffing task rules including:

    + The expected completion timeframe for the task.
    + Set the task from Pending to Active based on a system event.
    + Set the task from Pending to Active based on the completion of another task.

- Added an "Owning Office" value to Competencies in the Competency Library. This designation will ensure that only those users with appropriate administration permissions in the Owning Office can make changes to Competencies.

- Removed the ability to edit a Competency Name once that Competency has been used in an Assessment. This will ensure consistent name integrity throughout the use of the Competency.

- Updated the link to the Position Designation Tool under the Position Sensitivity field on the Position Information page of an individual Position Description. The updated link takes you the Suitability Executive Agent page on the OPM Website.

Reporting and Analytics

Staffing Reports Package

- Data o Applications namespace:

✦ Added new query items to enable reporting on information about application reviews, submission, and expiration.

- Application Detail folder > Application query subject o 'Application Is Expired': Flag indicating an application may no longer be considered for a given position (i.e., the Application Eligibility End Date has passed).

  o 'Application Is Reviewed By': The name (first name last name) of the user that marked an application as reviewed.

  o 'Application Is Reviewed Date/Time': The timestamp of when an application review was completed.

  o 'Application Original Submitted Date/Time': The timestamp of the first time an application was submitted.

✦ Added a new query subject and associated query items within the Request Detail folder to enable reporting on the workflow(s) associated with a request.

- Request Workflows query subject o 'Request Workflow ID': The unique database ID for the workflow. o 'Request Workflow Name': The name of the workflow assigned to the request. o 'Request Workflow Time to Hire Goal': The goal/target for overall time to hire for the request.

  o Assessment Packages namespace:

✦ Added a new query subject and associated query items within the Request Detail folder to enable reporting on the workflow(s) associated with a request.

- Request Workflows query subject o 'Workflow ID': The unique database ID for the workflow.

  o 'Workflow Name': The name of the workflow assigned to the request. o 'Workflow Time to Hire Goal': The goal/target for overall time to hire for the request. o Certificates namespace:

✦ Added a new query item to enable reporting on the name of the applicant list that was used to create a certificate.

- Certificate Detail folder > Certificate query subject o 'Certificate Applicant List Name': Name of the applicant list the certificate was created from.

✦ Modified the 'Certificate Filter Category Rating' query item to pull in the name and numerical value (e.g., Best Qualified (95)); the query item had previously been pulling in numerical values.

✦ Added a new query subject and associated query items within the Certificate Request Detail folder to enable reporting on the workflow(s) associated with a request.

• Certificate Request Workflows query subject ○ 'Workflow ID': The unique

database ID for the workflow. ○ 'Workflow Name': The name of the workflow

assigned to the request.

○ 'Workflow Time to Hire Goal': The goal/target for overall time to hire for the request.

○ New Hires namespace:

✦ Added new query subjects and items to enable reporting on information about the acceptance of forms and documents.

• New Hire Detail folder ○ New

Hire Forms query subject

✦ 'New Hire Form Accepted By': User name of the individual who accepted the form.

✦ 'New Hire Form Accepted Date/Time': The timestamp when the form was most recently accepted.

✦ Added a query subject and query items to enable reporting on details of onboarding invitations.

• New Hire Detail folder ○ New Hire Onboarding Invitations

✦ 'New Hire Onboarding Invitation Date/Time': The timestamp the onboarding invitation was sent to the new hire.

✦ 'New Hire Onboarding Invitation Discontinue Reason': The reason provided by a new hire for discontinuing the onboarding process.

✦ 'New Hire Onboarding Invitation Response': The new hire's response (e.g., continue, discontinue) to the invitation to onboarding.

✦ 'New Hire Onboarding Invitation Response Date/Time': The timestamp of the new hire's response to an onboarding invitation.

✦ 'New Hire Onboarding Invitation Sent By Email': The email address of the individual that sent an onboarding invitation to a new hire.

✦ 'New Hire Onboarding Invitation Sent By First Name': The first name of the individual that sent an onboarding invitation to a new hire.

- ✦ 'New Hire Onboarding Invitation Sent By Last Name': The last name of the individual that sent an onboarding invitation to a new hire.

- ✦ 'New Hire Onboarding Invitation Sent By Phone Number': The phone number of the individual that sent an onboarding invitation to a new hire.

- ✦ 'New Hire Onboarding Invitation Sent By User Name': The user name of the individual that sent an onboarding invitation to a new hire. ✦ Removed a query item that was in a query subject unrelated to the data returned by the query item (a new query item that returns the same data is now available in the new New Hire Onboarding Invitations query subject).

- • 'New Hire Detail Folder > New Hire Job Offers > New Hire Job Offer Declination Reason': The reason chosen by a selectee to decline a job offer (e.g., Declined Grade, Declined Location).

  - o This field is actually related to a selectee's response to an onboarding invitation, specifically to identify the reason chosen/provided by a new hire for discontinuing the onboarding process.

- ✦ Modified a behind-the-scenes join that resulted in the 'Send Tentative Offer Complete Date' query item not populating in reports when the 'Send Tentative Offer Task Owner' query item value is null. Following this modification, the complete date will populate even when the task owner field is null.

- o Tasks namespace:

  - ✦ Added a new query subject and associated query items within the Task Request Detail folder to enable reporting on the workflow(s) associated with a request.

    - • Task Request Workflows query subject o 'Workflow ID': The unique database ID for the workflow. o 'Workflow Name': The name of the workflow assigned to the request.

- o 'Workflow Time to Hire Goal': The goal/target for overall time to hire for the request.

- o Workflows namespace:

  - ✦ Added new query items to enable reporting on the status of workflows (e.g., Draft, Published), and the rules stating after which activity a workflow task should be activated.

    - • Workflow Detail folder o Workflow query subject

      - ✦ 'Workflow ID': The unique database ID for the workflow.

      - ✦ 'Workflow Status': Indicates the status of a workflow (e.g., draft, published).

- Workflow Tasks query subject

    ✦ 'Workflow Task Rules Start Task After': Rule stating after which activity
the task in the workflow is to start. If multiple rules exist, they will be concatenated into a single field. •
    Reports ○ The Application History Tracker Report, which is meant to display all applications
    for a specific applicant, was updated to include Applicant Phone Number in the report and to
    update the Vacancy Number field to provide a hyperlink to the vacancy in the USA Staffing
    interface when the report is run with HTML output.
    The report was also updated to include a prompt for Applicant Phone Number.

    ✦ Team Content > USA Staffing Packages and Folders > Staffing Reports > Staffing > Application ○
    Multiple reports containing data on filters used to create a certificate were updated to use query
    items from the new Certificate Filter folder in the Certificates namespace:

    ✦ Certificate Overview Report: this report is meant to display details about a specific certificate on a
    single, printable page.

        • Team Content > USA Staffing Packages and Folders > Staffing Reports > Staffing >
        Certificate

    ✦ Overdue Certificate Log: this report identifies certificates with an outstanding review whose due
    date has passed.

        • Team Content > USA Staffing Packages and Folders > Staffing Reports > Staffing >
        Certificate

    ✦ Request, Vacancy, Announcement, Certificate Log: this report is meant to display an end-to-end
    view of the selection process from request through certificate.

        • Team Content > USA Staffing Packages and Folders > Staffing Reports > Staffing >
        Request

- The Requests Pending Announcements report was created to display a list of approved requests that have
  not yet had an announcement created. The purpose of the report is to assist HR supervisors in prioritizing
  work for developing announcements.

    ✦ Team Content > USA Staffing Packages and Folders > Staffing Reports > Staffing > Workload
    Management