



Onboarding Workgroup

October 8, 2020

Created by the OPM Automated Systems Management Group

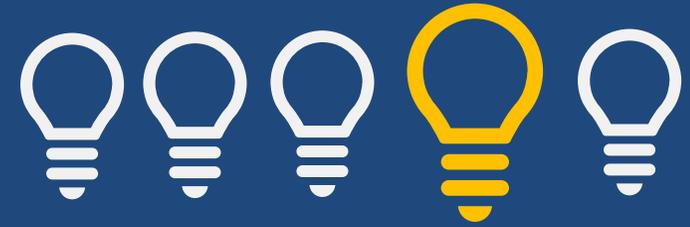
OFFICIAL USE NOTICE: This material is intended exclusively for use by USA Staffing Customers and is not to be distributed without approval from the USA Staffing Program Office. This communication may contain information that is proprietary, privileged, confidential or otherwise legally exempt from disclosure. If you have received this presentation in error, please notify the USA Staffing Program Office immediately and delete all copies of the material.



Agenda

- 1. Welcome**
- 2. Current Focus & Upcoming Priorities**
 - Task API
 - Selective Service System
 - Activity Summary
 - Data Inserts for New Hire Notifications
- 3. Special Topics**
 - State Tax Form Proposal
 - Updated EOD Guidance
 - Best Practices for Onboarding Political Appointees and other Senior Positions
- 4. Recently Added Features**
- 5. Open Questions/Demos**

USA Staffing Onboarding: Igniting Innovation Award Winner



The American Council for Technology and Industry Advisory Council's (ACT-IAC) annual Igniting Innovation 2020 Conference and Awards event identifies, recognizes, promotes, and connects the best innovations and innovators to improve services to citizens and government operations.

Igniting Innovation Award: The one best innovation selected by the attendees.

Transformer Award: Innovation that repurposes existing solutions in new or different ways resulting in new or broadened applicability and uses.

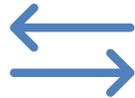
View USA Staffing Onboarding's video submission here:
<https://youtu.be/-1uZZhDUkYo>



Current Development Priorities



Activity Summary for Core System Users



Task API for New Hire Interconnection



Additional Onboarding Data Inserts



Updates to New Hire Document Management



Send Data

Identify triggers for USAS to transmit new hire data to interconnected systems



Receive Data

Interconnected systems transmit status updates and summary task info back to USAS



Milestones

As key tasks are completed, these milestones are tracked as significant steps in the new hire's journey



Display Results for HR Users

Detailed status updates are communicated to HR through dashboards, emails, and an expanded new hire interface



Communicate with Hiring Managers & New Hires

Both hiring managers & new hires get updates from a single, user-friendly system as milestones are reached

NHI Status Updates

In Development

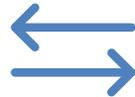
FY2021



Upcoming Development Priorities



Activity Summary for New Hires



Implementation of System-wide Interconnections



Branding of New Hire Notifications



Improve New Hire Experience on Mobile Devices



Selective Service/ USA Staffing Interconnection Goal

Reduce **duplicate data entry**, improve **data quality** and improve **transparency** into the Selective Service verification process by sending new hire information via a data interconnection from USA Staffing to the Selective Service System (SSS).

MVP: Initiate SSS verification through USA Staffing New Hire Interconnection (NHI)



1 New Hire submits OF-306 to USA Staffing



2 USA Staffing sends **basic New Hire data from OF-306** to SS

- Name (First/M/Last/Suffix)
- Email
- SSN
- DOB
- Birth Country/State/County/City
- Organization



3 SSS **initiates verification for New Hire** based on data sent from USA Staffing

Phase II: Send task results & status updates to USAS



6 New Hire, HR, & Hiring Managers track status of BI & other onboarding processes in single USA Staffing platform

5 USA Staffing captures status updates for HR, Hiring Manager, and New Hire to track

4 SSS sends status updates regarding New Hire's verification to USA Staffing



Activity Summary Update

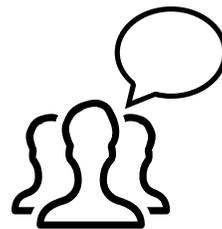




Keeping HR professionals and agency staff informed

Provide HR and Onboarding Users a snapshot of key onboarding items requiring their attention in USA Staffing.

The Activity Summary will serve as a call to action for Users who may not otherwise be logged in to the system on a daily basis.



Planned capability:

Enhancements to improve how HR and other

Onboarding users (e.g., personnel security, benefits, payroll, etc.)

access USA Staffing by implementing an activity summary that will keep hiring staff and new hires “in the know” about tasks and statuses on a regular basis.



Timeline



Phase I: Will Include -

- A. Staffing and Onboarding Tasks

Deployed to Production July 24th

- B. New Hire Assignment and Forms

Currently in Development

Phase II: New Hire Tasks (Email to New Hires)

Phase III: Hiring Manager

Preferences



Frequency – Users can determine how often they receive the Activity Summary (i.e., never, daily, weekly, etc.)

Content – Users can determine which sections of content are included in the Activity Summary (i.e., tasks, new hire assignment/forms, etc.)

Deployed to Production July 24th



Activity Summary Enhancements



Made Activity Summary **resilient**



Added a unique **tenant identifier** to the email when subscribed in multiple tenants



Updated **email text** based on usability feedback



Added online **help content**

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



Present Sample Activity Summary Email

Thu 9/10/2020 12:00 AM
usastaffingoffice@opm.gov
USA Staffing Activity Summary as of Thursday, September 10, 2020
To Link, Jessica A.

Below is your activity summary for items in USA Staffing as of Thursday, September 10, 2020. Please log into <https://usastaffing.staffingdev.opm.gov/> to take action.

Tasks

You are assigned 184 active tasks, this may include tasks for which you have been newly assigned as the Task Owner. These upcoming tasks include:

- [Initiate Childcare Background Checks for Test Applicant](#) due 9/10/2020
- [Initiate Physical Exam for Test Applicant](#) due 9/11/2020
- [Initiate Background Investigation/Security Clearance for Jennifer Gunther](#) due 9/12/2020
- [Initiate Suitability Review for Test Applicant](#) due 9/13/2020
- [Initiate Childcare Background Checks for Jennifer Gunther](#) due 9/13/2020

You are assigned 175 tasks that are overdue. These tasks include:

- [Initiate Background Investigation/Security Clearance for Charlotte R Austin](#) due 4/5/2019
- [Initiate Background Investigation/Security Clearance for Peter G Bachrach](#) due 4/5/2019
- [Initiate Background Investigation/Security Clearance for Test Chap](#) due 4/5/2019
- [Initiate Background Investigation/Security Clearance for Prince Charming](#) due 4/5/2019
- [Initiate Background Investigation/Security Clearance for Jennifer D](#) due 4/5/2019

Note: This is an automated email message. Please do not reply. To update your activity summary subscription preferences, or to unsubscribe, access your User Preferences page from within your User Profile in USA Staffing.

USA Staffing® System



New Hire Content for Activity Summary

Planned Content

- Add **New Hire Process Owner** content
 - Will list one section that consists of the new hires in which you are assigned as the process owner including any that were recently assigned to you.

- Add **New Hire Forms** content
 - Will list a section of new hires, in which you are assigned as the process owner, who have recently submitted forms ready for HR action.
 - Will also list a section of new hires that have eOPF transmission errors, given you are the user who added the file to the eOPF queue.



Mockup of New Hire Content

New Hire Process Owner

You are the process owner for 25 new hires who were assigned to you since Wednesday, September 23, 2020. These new hires include:

- [Shave III, Stuart](#), number HSCMD-EDUM
- [Hobbs, Kelly](#), number HLXOO-31E8
- [Robinson, Dana](#), number HXWD4-1W3R
- [Link, Jessica A](#), number HHMEV-G2Q8
- [Reaves Jr, Jenn](#), number H8GKI-675A

New Hire Forms

You have 13 new hires who have submitted forms ready for your review since Wednesday, September 23, 2020. These new hires include:

- [Jeter, Dominic](#), number H2ZKC-DDZ4
- [Tolleson, Edmond](#), number HD7PX-CH5B
- [Ratched, Mildred Ann](#), number HMZZQ-43W4
- [Murphy, Ryan Paul](#), number HMHU1-M3DJ
- [Hanover, Richard](#), number HCNBF-QY94

You previously added filed to the eOPF queue for 6 new hires that resulted in a transmission error since Wednesday, September 23, 2020. These new hires include:

- [Dawson, Michael Ray](#), number HEFEA-LGG4
- [Locke, John](#), number HO2YP-2SG7
- [Pace, Charlie D](#), number HZIMC-ZN4U
- [Shephard, Jack A](#), number HWSZ6-WU9C
- [Littleton Sr, Claire](#), number HYIRE-FP5S



Data Inserts for New Hire Notifications





Available Data Inserts

- Authentication

Login.gov/USAJOBS Username New Hire Login URL Official Offer URL

- Employer

Activity/Unit Agency/Department Agency/Department Address Line 1
Agency/Department Address Line 2 Agency/Department Address Line 3
Agency/Department City Agency/Department Postal Code
Agency/Department State Branch/Organization Bureau/Division

- New Hire

Address 1 Address 2 Apartment City Country First Name Last Name
Middle Name Postal Code State Suffix

- Position

Announcement Number Appointment Type Date HR Confirmed Entry on Duty
Duty Location - Address Line 1 Duty Location - Address Line 2
Duty Location - City Duty Location - Country Duty Location - State
Effective Date of Appointment Grade Not To Exceed Pay Plan
Position Description Number Position Title Projected EOD Date
Promotion Potential Request Number Salary Salary Type Series Step

- Contacts

Benefits Contact Email Benefits Contact Name Benefits Contact Phone
HR Contact Email HR Contact Name HR Contact Phone Logged In User Name
Payroll Contact Email Payroll Contact Name Payroll Contact Phone
Process Owner Email Process Owner Name Process Owner Phone
Supervisor/Manager Email Supervisor/Manager Name
Supervisor/Manager Phone



Data Inserts for Onboarding Notifications

In Development ~ Production Release 11/13/20

○ 'Appointment Type'

- Populates the Appointment Type field displayed on the New Hire Questionnaires Position Information page.
- If new hire was audited from a certificate, this field will auto-populate from the Announcement > Appointment Type field. User can edit if necessary.
- If new hire was created from an Onboard New Hire request, user must manually enter this field.

○ 'Not to Exceed'

- Populates the Not to Exceed field displayed on the New Hire Questionnaires Position Information page.
- If new hire was audited from a certificate, this field will auto-populate from the Announcement > Not to Exceed field. User can edit if necessary.
- If new hire was created from an Onboard New Hire request, user must manually enter this field.

The screenshot displays the 'Announcement Information' section of the OPM system. The 'Appointment Type' field is highlighted in yellow and contains the value 'Temporary'. The 'Not to Exceed' field is also highlighted in yellow and contains the value '2 years'. Other fields include 'Announcement Number' (CG-19-PH-10020486), 'Open Date' (08/13/2019), 'Salary Type' (Per Year), 'Minimum Salary' (95,000), 'Work Schedule' (Part-Time), 'Part-Time Hours' (25), and 'Set Promotion Potential' (14).



Data Inserts for Onboarding Notifications

Upcoming Data Insert Development

- Tentative Offer Response Due Date
- Official Offer Response Due Date
- Work Schedule
- Security Clearance
- Duty Location – Postal Code
- Current Date
- Additional Agency Contact





USA Staffing State Tax Form Proposal



Current State Tax Form Process

- 1 Updated State Tax Forms are published by the USA Staffing Program Office each spring
- 2 Onboarding specialists manually add state tax forms to each new hire record based on the new hire's state of residence
- 3 New hires complete state tax forms along with other automated onboarding forms



Pros & Cons of Current Process

- + Electronically Completed & Signed**
As an automated form, New Hires complete and sign state tax forms along with other forms
- + Response Reuse for New Hires**
Because state tax forms are built as automated forms, new hire responses to the questionnaire are automatically applied
- Confusion for New Hires**
Questionnaire items linked to state tax forms cause the most confusion to the new hires
- Not Part of Workflows**
State tax forms must be added individually to new hires based on their specific location
- Delayed Response**
There is no master site for all tax forms, and we don't have an automated way to know when an updated form is published by state tax agencies
- Opportunity Cost**
High level of effort to update state tax forms each year means we aren't building custom forms



Proposed State Tax Form Process

- 1 PDF versions of current year State Tax Forms will be stored on the USA Staffing Resource Center
- 2 USA Staffing will add a system task for Tax Form Document Upload with instructions that link new hire to collection of state tax form PDFs. Agency users can add this task to any appropriate workflows
- 3 New hires download, fill out, and upload state tax forms via document upload task



Pros & Cons of Proposed Process

- + New Hires have Complete Instructions**
State tax form instructions add context to items, eliminating confusion for new hires
- + One Doc Upload Task for all Workflows**
A single 'Submit State Tax Form' document upload task can be added to all onboarding workflows, eliminating the need for onboarding specialist manual intervention for individual locations
- + Updated Forms Available Immediately**
Because development work is not required to update forms, new versions will be available within hours
- Manual Upload for New Hires**
New hires must download, fill out, and upload state tax forms via a Document Upload Task
- No In-System Electronic Signature**
Because these forms would be submitted as Document Uploads there would be no use of USA Staffing's Electronic signature capability for New Hires or HR users



USA Staffing®

Great Government Starts Here®

OPM's Talent Acquisition System for Federal Agencies

Navigation

▶ [Home](#)

Security And Privacy

- ▶ [Privacy Policy](#)
- ▶ [Terms And Conditions Of Use](#)

State Tax Forms



Click on the state tax form you wish to download.

- [Alabama](#)
- [Alaska](#)
- [Arizona](#)
- [Arkansas](#)
- [California](#)
- [Colorado](#)
- [Connecticut](#)
- [Delaware](#)
- [Florida](#)
- [Georgia](#)
- [Hawaii](#)
- [Idaho](#)
- [Illinois](#)
- [Indiana](#)
- [Iowa](#)
- [Kansas](#)
- [Kentucky](#)
- [Louisiana](#)
- [Maine](#)
- [Maryland](#)
- [Massachusetts](#)
- [Michigan](#)
- [Minnesota](#)
- [Mississippi](#)
- [Missouri](#)
- [Montana](#)
- [Nebraska](#)
- [Nevada](#)
- [New Hampshire](#)
- [New Jersey](#)
- [New Mexico](#)
- [New York](#)
- [North Carolina](#)
- [North Dakota](#)
- [Ohio](#)
- [Oklahoma](#)
- [Oregon](#)
- [Pennsylvania](#)
- [Rhode Island](#)
- [South Carolina](#)
- [South Dakota](#)
- [Tennessee](#)
- [Texas](#)
- [Utah](#)
- [Vermont](#)
- [Virginia](#)
- [Washington](#)
- [West Virginia](#)
- [Wisconsin](#)
- [Wyoming](#)



Let's check in on Menti!

Please click the link in chat or go to [menti.com](https://www.menti.com) and enter code

76 28 53 4



Updated EOD Guidance





Updated EOD Guidance and USA Staffing Impact

Goal: to ensure the documents stored in eOPF are appropriate and adhere to eOPF’s privacy and security controls

Summary of Key Changes

Removal of several Standard and agency-wide forms from eOPF instances



USA Staffing Impact

Complete by November 6

Confirmation that SF1152 cannot be electronically signed



Complete

Update SF 181 and SF 256 to be certified on or after EOD



To be implemented in Q1 FY21

Forms should only be transmitted to Permanent or Temporary folders from EOD system – limited use of virtual folders



TBD; Pending further clarification from EHRI

EOD system recertification



TBD; Pending further clarification from EHRI



Best Practices for Onboarding Political Appointees and other Senior Positions



Let's head back to Menti!

We'll continue this topic in the same Menti we used before

If you closed that window, just go to [menti.com](https://www.menti.com) and enter code 76 28 53 4



Recently Added Features



Recently Added Features

- HR User who Completed Verify New Hire Arrived task name is displayed on Overview page
- Tags flow in from Vacancy to New Hire record
- Added the ability to preview attachments once a template is selected for use in the Preview Notification window from within a New Hire record
- Increased file size to 5MB for uploaded documents
- Ability to add Task Level notes
- Multi Item Multi Response (MIMR) details visible in Complete New Hire Questionnaire task
- View Documents Permissions and Permission Label changes



Verify New Hire Arrived task completion and Vacancy Tags

- User who completed Verify New Hire Arrived task displays on Overview page
- Vacancy Tags on Settings page flow into the new hire record

USA Staffing NEW HIRE STEVEN APEX

Customer: USA Staffing Demo Customer | New Hire Number: HOUQA-IARC | Status: Active

Summary

Name	Steven Apex
Pay Plan-Series-Grade	GS-0343-9
PCS Eligible	<input type="checkbox"/>
Position Title	Program Analyst
Office	USA Staffing Demo Office
Customer	USA Staffing Demo Customer
Creation Date	9/8/2020
Start Date	9/28/2020
Request Number	20200723-66778-0002
Vacancy	10873894
Announcement Number	20-CBPK-10873894
Certificate Number	20200908-CBPK-001
Tentative Offer	Accepted: 9/8/2020 Login.gov/USAJOBS Username: stevenapex123@gmail.com
Official Offer	Accepted: 9/8/2020

Contact Information

Supervisor/Manager: Robyn Bachmann
 Onboarding Process Owner: Dana Robinson
 HR Contacts: Dana Robinson
 Benefit Contacts:
 Payroll Contacts:
 Additional Information: COVID-19, Tax Reform

Tasks	Forms	Documents
Incomplete New Hire Tasks: 1	Incomplete Forms: 1	Application Documents: 4
Completed New Hire Tasks: 6	Completed Forms: 3	Onboarding Documents: 1
Incomplete Agency Tasks: 1		
Completed Agency Tasks: 11		

Verify the New Hire Arrived for their First Day of Duty task completed by Dana Robinson on 9/30/2020 9:17:15 AM



Preview attachments from Notification Template and Increased File Size

- Added the ability to preview attachments once a template is selected for use in the Preview Notification window from within a New Hire record.
- Updated File size to 5MB for Attachments & Uploaded Documents

Preview Notification

To: quinn.garcia1900e@gmail.com

cc:

Reply To: dana.robinson@opm.gov

Subject: Official Job Offer

Dear Quinn Garcia,
 Congratulations, you are being officially offered the following position with the Office of Personnel Management:
 Position Title: Human Resources Specialist
 Series: 0201
 Pay Plan: GS
 Grade: 11
 Duty Location: Miami Beach, Florida

The Office of Personnel Management uses an... declination of this job offer, complete and process employment
 forms, track completion of assigned tasks, a... ond to the official job offer outlined in this notification:

<https://onboard.usastaffing.gov/?selectee=>

If you accept the official job offer, you must
 (1) Verify your identity by entering you Post

Previewing notification for New Hire Garcia, Quinn

Attachments can be previewed here before sending the notification.

Attachments and document uploads file size limit increased to 5MB

Attachments Add

- Covid memo to employees.pdf 🗑
- Metro rail map.pdf 🗑
- Things Employees Should Bring On Their F... 🗑



Add Task Level Notes

USA Staffing® Staffing Classification Recruit Admin Reports Search Go To Kelly Hobbs

NEW HIRE AUBREY D AARONE ▾

Overview Assignments Questionnaires Retrieve Drug Test Results

AUBREY D AARONE KELLY.HOBBS@OPM.GOV Customer Customer 1 - Linked to Office A New Hire Number HPI9R-DMSG Status Active

Task Details Notes 1 History

Due Date	Task Name	Active Date
02/09/2020	Retrieve Drug Test Results	02/07/2020

Task Instructions

Completion Date

Notes

Kelly Hobbs Human Resources User 9/8/2020 11:43 EDT

Drug test completed. Show on this tab only [Reply](#) [Delete](#)

Lab is experiencing significant delays due to COVID-19

Show as Task Note Only Cancel Save

When the Box is Unchecked, the Notes should populate on the Overview and Assignments pages



Multi Item Multi Response (MIMR) Details Visible in Questionnaires

When viewing a questionnaire listed under the Complete New Hire Questionnaire task, a **View** button has been added to all entries in the Actions column. This allows the HR User to view the new hire's responses to multi item multi response questions.

The screenshot shows the USA Staffing interface for a new hire named Steven C Apex. The 'Complete New Hire Questionnaire' tab is selected and highlighted with a red circle. Below the navigation tabs, the user's information is displayed: STEVEN C APEX, Customer A, and New Hire Number HRK9S-GZ6A. The status is 'Active'. The 'Uniformed Service' section is active, showing a table of service records. The table has columns for Branch of Service, Start Date, End Date, Discharge Type, and Actions. Two rows are visible: Air Force (04/01/2010 to 04/01/2013) and Army (10/01/2005 to 10/08/2008). Both rows have a 'View' button in the Actions column, which is circled in red. The interface also includes a search bar, navigation menu, and user profile information (Dana Robinson - OPM).

Branch of Service	Start Date	End Date	Discharge Type	Actions
Air Force	04/01/2010	04/01/2013	Honorable	View
Army	10/01/2005	10/08/2008	Honorable	View



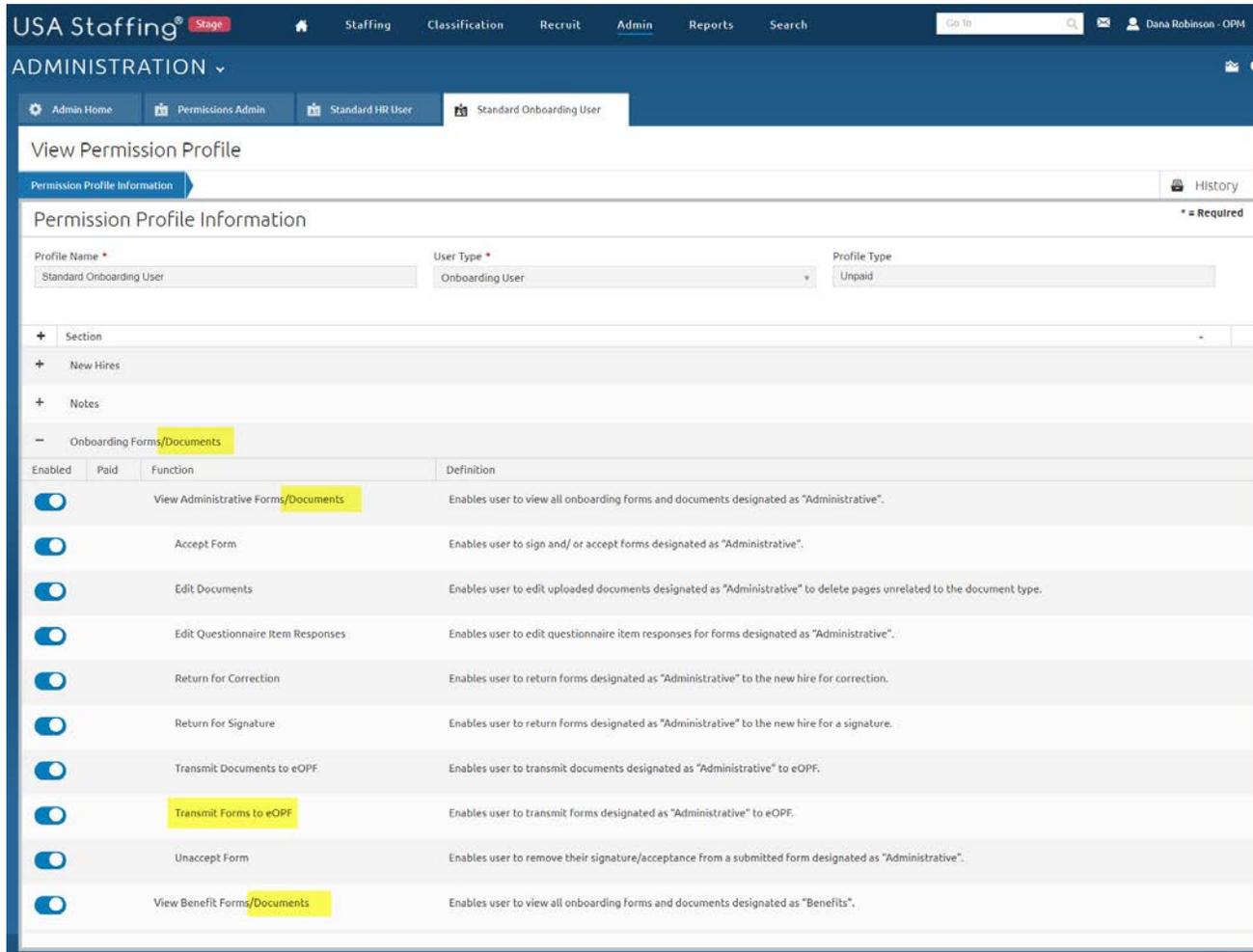
Multi Item Multi Response (MIMR) Details Visible in Questionnaires

After clicking the **View** from the Actions column, the new hire's responses to multi item multi response questions are viewable to the HR User.

The screenshot displays the USA Staffing web application interface. At the top, the navigation bar includes 'USA Staffing', 'Stage', and various menu items like 'Staffing', 'Classification', 'Recruit', 'Admin', 'Reports', and 'Search'. The user is identified as 'Dana Robinson - OPM'. The main content area is for a 'NEW HIRE STEVEN C APEX'. Below this, there are tabs for 'Overview', 'Assignments', 'Questionnaires', 'Complete New Hire Questionnaire', and 'Employment Information'. The 'Questionnaires' tab is active, showing details for 'STEVEN C APEX' with a 'Customer' of 'Customer A' and a 'New Hire Number' of 'HRK9S-GZ6A'. The status is 'Active'. A modal window titled 'Add Uniformed Service' is open, containing the following fields: 'Branch of Service' (dropdown menu with 'Air Force' selected), 'Start Date' (text input with '04/01/2010'), 'Have you been discharged from this branch of service?' (radio buttons for 'Yes' and 'No'), 'End Date' (text input with '04/01/2013'), 'Discharge Type' (dropdown menu with 'Honorable' selected), and 'Enlistment Type' (radio buttons for 'Enlisted' and 'Officer'). In the background, the 'Uniformed Service' section is visible with a list of 'Air Force' and 'Army'. The 'Actions' column on the right has two 'View' buttons and a 'Continue' button.



Permission Label changes and View Documents Permissions



- The Permission Profile Information page was updated to include **“Onboarding Forms/Documents”**
- Previously, this section only included **“Onboarding Forms”** even though the permission also applied to Documents



Permission Label changes and View Documents Permissions

USA Staffing®

NEW HIRE STEVEN APEX

Overview | Assignments | Questionnaires

STEVEN APEX
STEVENAPEX123@GMAIL.COM

Customer
USA Staffing Demo Customer

New Hire Number
HOUQA-IARC

Status
Active

Manage Tasks | Documents | Forms

Documents 6

Not hyperlinked due to limited profile permissions to view different document types.

<input type="checkbox"/>	Document Type	Document Name	Document Source	Received	Transmission Status	Scheduled Transmit Date	Status Date	Delete
<input type="checkbox"/>	OF 306	OF-306 Pre-employment.pdf	New Hire	10/6/2020 13:11 EDT	Ready to Transmit			
<input type="checkbox"/>	No Document Type Selected	Steve's Cover Letter	Application	9/8/2020 15:41 EDT	Ineligible for Transmission			
<input type="checkbox"/>	No Document Type Selected	Steven Apex DD214	Application	9/8/2020 15:41 EDT	Ineligible for Transmission			
<input type="checkbox"/>	DG 15	Steven Resumebuilder	Application	9/8/2020 15:41 EDT	Ready to Transmit			
<input type="checkbox"/>	No Document Type Selected	Promotion 50	Application	9/8/2020 15:41 EDT	Ineligible for Transmission			
<input type="checkbox"/>	No Document Type Selected	IT Security Training Cert. 2019.jpg	New Hire	9/8/2020 22:43 EDT	Ineligible for Transmission			

Add Document

The Document Name will not display as a hyperlink if the HR User does not have access to view the document's permission category based on their permission profile



Open Demo and Q&A

Is there anything you'd like us to show you?

Is there anything you'd like to show the group?





Resources and Contacts

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/USAS/index.php?title=USA_Staffing_Resource_Center)

<https://help.usastaffing.gov/ResourceCenter/index.php/Resources>

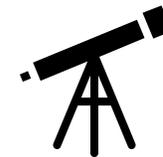
Online Help

Search for information by Page and by Task

[https://help.usastaffing.gov/USAS/index.php?title=Help for USA Staffing HR Users](https://help.usastaffing.gov/USAS/index.php?title=Help_for_USA_Staffing_HR_Users)

Future Questions?

Your USA Staffing Account Manager can assist in answering any questions and can include the applicable onboarding team member.



Check out the Resource Center for recently updated documents such as:

- Onboarding Frequently Asked Questions
- Creating Tasks and Workflows Quick Reference Guide