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# **USA Staffing**

## **Onboarding Feature Implementation Guide**

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**OPM HR SOLUTIONS**  
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## Introduction

Similar to implementing the Staffing portion of the system, a successful transition to utilizing the Onboarding capabilities requires communication with internal and external stakeholders. Onboarding processes may include HR, union representatives, security and other functions specific to your agency. It is important to provide awareness to gain buy-in and to ensure all necessary parties have weighed in on the process.

Identifying success factors may be helpful including defining how widespread the adoption of the business processes will be, assembling an implementation team, creating SOPs (standard operating procedures) for the agency and finding the pain points in your agency's current process. Many agencies benefit from a phased implementation so that they may apply lessons learned agency-wide. Even those that have automated the rest of their staffing processes find places to improve when incorporating the New Hire and Onboarding features – including timelines for communication and reviewing the use of agency specific forms.

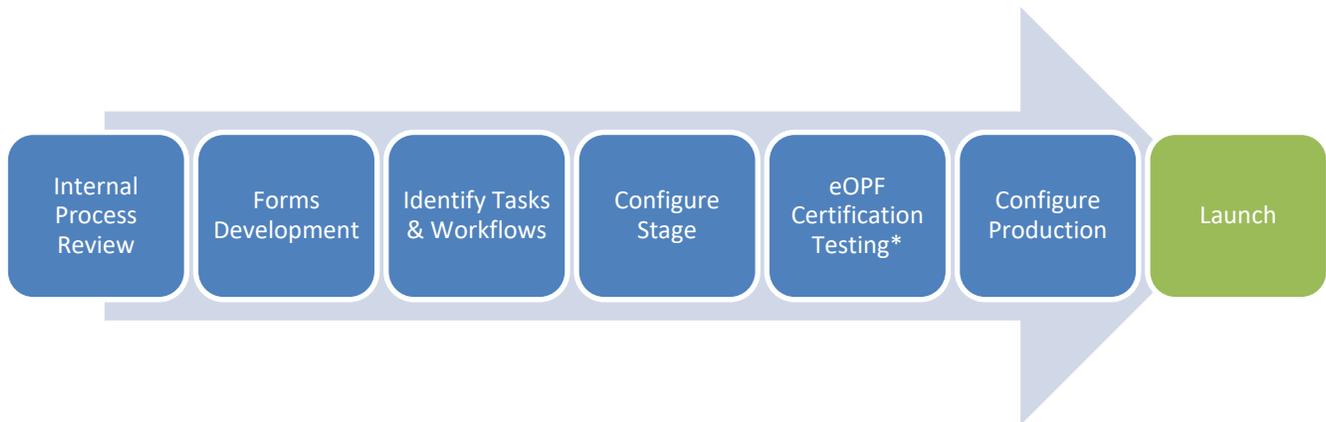
The purpose of this guide is to serve as a checklist that will guide your agency through major items that should be considered prior to implementing the USA Staffing Onboarding features. The checklist below includes action items, events, and key considerations for implementing the Onboarding features. For each item, there is also a recommended timeframe which is the suggested amount of time the items should be completed prior to using the Onboarding features. Please reach out to your Account Manager if you have any questions. They will be your liaison to the USA Staffing Onboarding team who can provide further guidance.

## Features of USA Staffing Onboarding Functionality

- ✓ Fully integrated within USA Staffing to allow seamless end-to-end hiring and onboarding
- ✓ USA Staffing and Onboarding seamlessly integrate data flow from USAJOBS to the new hire record
- ✓ Shared Sign-on with USAJOBS for Applicants/New Hires reduces login burden
- ✓ Allows creation of New Hire records from outside of USA Staffing
- ✓ Enables HR Users to assign government-wide and Agency specific forms to a New Hire
- ✓ Guides New Hires through simple questionnaires that automatically populate a wide array of forms
- ✓ Validates user input
- ✓ Allows New Hires and HR Users to e-sign eligible forms
- ✓ Allows New Hires and HR Users to upload documents
- ✓ Transmits directly to eOPF
- ✓ Allows HR User role customization to allow for flexibilities in unique hiring processes
- ✓ Allows for creation of customizable tasks and workflows to support Agency's entrance-on-duty process
- ✓ Provides customizable notifications to increase and improve New Hire communication
- ✓ Permits HR Users to monitor New Hire processes
- ✓ Includes streamlined end-to-end reporting
- ✓ Includes online help and access to user support
- ✓ Included in USA Staffing license fee
- ✓ Onboarding only users do not count towards Agency USA Staffing license limit
- ✓ Complies with Enterprise Human Resource Integration (EHRI) requirements

## Onboarding Pre-Implementation Key Actions

The diagram below is a high-level overview of the key actions needed to implement the Onboarding features. A more detailed flow can be found in [Appendix A](#).



\* If eOPF is not used by your agency, you do not need to complete this activity

### Demonstration of USA Staffing Onboarding Features

If your agency has not already done so, we strongly recommend scheduling a demonstration of the Onboarding features available in USA Staffing. Watching these features in action will help your agency better understand how the Onboarding features can be used to meet the needs of your agency. It can also help you identify any areas of your onboarding process that can be improved by utilizing the onboarding features.

In the demo of the onboarding features, the following topics are covered:

- Tasks
- Workflows
- Creating/Approving a Request
- Sending Notifications
- Walkthrough of Process from New Hire Perspective
- Review and Approval of Forms by HR
- Transmitting Forms/Documents to eOPF (if applicable)

If you are interested in scheduling a demo, please work with your Account Manager.

### Conduct a Process Review of Your Current Onboarding Practices

The onboarding process is unique to each agency. Therefore, as you prepare to implement the Onboarding features of USA Staffing, we recommend conducting a process review of your agency's current onboarding procedures. The process review may include the following activities:

- **Identify gaps in onboarding procedures or practices.** Sometimes gaps can be found within an organization as a result of geographic dispersion of staffing offices, level of experience your staff has with hiring and technology, and various business practices across divisions of an organization. The [OPM Human Resource Line of Business \(HRLob\) Entrance on Duty Concept of Operations \(CONOPS\)](https://www.opm.gov/services-for-agencies/hr-line-of-business/standardization/conceptoperations.pdf) (<https://www.opm.gov/services-for-agencies/hr-line-of-business/standardization/conceptoperations.pdf>) can be used to assess your agency's onboarding practices.

- **Identify areas that can be improved by USA Staffing.** By implementing the Onboarding component of the USA Staffing, there are many features that can be leveraged to improve your agency's onboarding processes. For example, tasks can be utilized to reduce the reliance upon paper checklists and improve efficiency. Workflows can be customized to include triggers to start tasks and target days to complete, and tasks that become overdue are flagged on users' dashboards.
- **Assess your reporting needs.** When reviewing your process, think about any milestones or key phases of the hiring process that you would like to report on. Effectively using tasks and workflows to capture these milestones can be beneficial to helping you identify any bottlenecks in your process.

## Identify The Appropriate Tasks and Workflows

The utilization of tasks and workflows can further enhance your agency's onboarding practices. Agencies can monitor hiring phases and milestones through tasks and workflows to identify potential bottlenecks in the process.

**Tasks** are activities that must be completed to onboard a New Hire. Tasks can be designated for completion by HR User or the New Hire. Tasks assigned to the HR User can serve as internal reminders and checklists for the HR staff to ensure all onboarding requirements are completed. Tasks assigned to the New Hire serve as a way to for them to complete any required forms and communicate that specific assignments are to be satisfied in order to complete the onboarding process (e.g. fulfilling various background investigation requirements, drug testing, physical fitness tests and other pre-employment obligations).

A **workflow** is a set of tasks that can be assigned to HR or the New Hire. Workflows provide HR users with an option to simultaneously assign tasks that are routinely assigned to New Hires. This feature eliminates the need to individually assign tasks, and reduces inadvertent omission of assignments to New Hires.

We have provided sample workflows that can be used by your agency in [Appendix B](#). For more information about how to create tasks and workflows, you can refer to the Tasks and Workflows Guide found on the [Resource Center](#).

## Create New Hire Notification Templates

Your agency can create custom notification templates to deliver consistent messages to new hires efficiently, and maintain a record of those communications. In addition to the standard Tentative and Official Offer templates, your agency can determine if there are any additional New Hire communications that should be created. We have example language that can be included in your Tentative and Official Offer notification templates available on the [Resource Center](#).

## Identification of Forms & Documents

Another benefit to using the USA Staffing Onboarding features is the ability for the system to capture data via questionnaires to complete forms. The new hire only needs to provide an answer one time for it to be populated in all assigned forms. These system-generated forms can be reviewed, electronically signed and submitted by both HR and New Hires. Many government-wide forms have already been developed in the system. We encourage you to review the list of readily available forms on the [Resource Center](#) and determine what additional agency-specific forms, if any, that need to be developed.

The Forms Configuration Worksheet has been developed to capture the information needed to configure your forms with the workflows and permission categories that you specify. Additional information about form workflows can be

found in the Forms Configuration guide which can be obtained on the [Resource Center](#).

## eOPF Self-Certification Process & Setup

HR users can utilize USA Staffing to transmit forms and documents to the OPM Enterprise Human Resources Integration (EHRI) electronic Official Personnel Folder (eOPF) system. When implementing the Onboarding features your Account Manager will help you collect the information needed to establish the required interconnections. An important part of this process is the eOPF self-certification process. If your agency uses eOPF, this step is required in order for your agency to transmit to eOPF through USA Staffing. The main goal of this effort is to test the reproduction and population of the government-wide forms developed in USA Staffing and ensure successful transmission of these forms to eOPF as required for your agency. We have an SOP in USA Staffing.

The USA Staffing Program Office will need to gather some important information in order to properly configure your agency's eOPF instance to be able to transmit your approved eOPF forms. USA Staffing can delay sending the forms until the eOPF file is created. This delay time is added to the entry on duty date for the new hire to calculate the date when forms are to be transmitted to eOPF once added to the queue. We will also need to know if your agency services another organization that would require transmission of forms and documents to another instance, so the necessary configurations can be made.

The eOPF System Certification SOP on the [Resource Center](#) outlines the process for preparing, testing, certifying and gaining approval to activate the eOPF interconnection for any customer utilizing the New Hire features.

## Identify Agency Users

USA Staffing allows great flexibility to assign various levels of access to different users. In addition to standard profiles for Human Resource, Hiring Manager and Onboarding Users, profiles can be customized to handle the various needs of your onboarding processes. Users outside of HR who may be a part of the onboarding process such as security personnel, payroll personnel, etc. should be identified as individuals who will need Onboarding User accounts. In addition, administrators should be identified for your agency that will have special access to create additional users, setup tasks, workflows and any relevant notification templates.

## Permission Profiles

Permission profiles are used to assign permissions to users in your organization which dictate what they can and cannot do in the system. They offer flexibility to assign various levels of access to different users and can be customized to handle the various needs of your agency's process. One way to accomplish this is through the use of form permission categories to control what form related action a user can perform for any form associated with the category. These form actions may include: accept a form, return for signature, return for correction, unaccept form, edit questionnaire item responses and transmit to eOPF.

For example, you may want members of your security team to be able to access new hire forms related to their daily work such as reviewing the OF-306. This can be accomplished by informing the USA Staffing Program Office that you would like to designate the OF-306 as a Security Form. Then you could create a custom permission profile that restricts their access to only Security Forms. In the image below, you can see that individuals with these permissions can view Security Forms and Return for Signature or Correction but they cannot Transmit to eOPF.

<input checked="" type="checkbox"/>	View Security Forms
<input type="checkbox"/>	Accept Form
<input type="checkbox"/>	Edit Documents
<input type="checkbox"/>	Edit Questionnaire Item Responses
<input checked="" type="checkbox"/>	Return for Correction
<input checked="" type="checkbox"/>	Return for Signature
<input type="checkbox"/>	Transmit Documents to eOPF
<input type="checkbox"/>	Transmit to eOPF
<input type="checkbox"/>	Unaccept Form

Additional examples include:

- Limiting Payroll personnel with access to only Payroll Forms (e.g. Direct Deposit forms)
- Allowing Users outside of HR to Transmit to eOPF but restricting additional access

A listing of the current form permission categories are listed below.

Form Permission Category	Description
Administrative Forms	For onboarding forms to be designated as “Administrative”
Benefit Forms	For onboarding forms to be designated as “Benefit”
Employment Condition Forms	For onboarding forms to be designated as “Employment Condition”
Entrance-On-Duty Forms	For onboarding forms to be designated as “Entrance-On-Duty”
Investigation Forms	For onboarding forms to be designated as “Investigation”

Form Permission Category	Description
Payroll Forms	For onboarding forms to be designated as “Payroll”
Pre-Employment Forms	For onboarding forms to be designated as “Pre-Employment”
Security Forms	For onboarding forms to be designated as “Security”
Training Forms	For onboarding forms to be designated as “Training”

Please note that the Standard permission profiles include access to all form permission categories. The standard permission profiles include:

- HR Assistant
- HR View Only
- Office Administrator
- Onboarding Only User
- Onboarding View Only
- Standard HR User
- Standard Onboarding User

For more information about permissions please refer to the USA Staffing System Permissions guide on the [Resource Center](#).

## Configuration of Stage & Production Environments

Once key decisions regarding office and customer structure and eOPF instance have been made, a stage environment can be setup for your Agency. Administrators will then be able to setup the users, tasks, workflows and notification templates that will be needed as a part of your onboarding processes. Access to the stage environment will allow your agency to simulate your onboarding process to ensure it is setup properly and will allow users to become familiar with the features. Confirming your stage environment is setup accurately will help to facilitate the proper configuration of your agency’s production environment when it is time to begin using the Onboarding features.

## Onboarding Pre-Implementation Checklist

Item	Description	Recommended Timeframe	Complete
Demo	<ul style="list-style-type: none"> <li>• Has your agency seen a demonstration of USA Staffing Onboarding features?</li> </ul>	60-120 days	
Process Review	<ul style="list-style-type: none"> <li>• Has your agency reviewed its current onboarding processes?</li> <li>• Have opportunities for improvement been identified and/or implemented?</li> </ul>	60-120 days	

Item	Description	Recommended Timeframe	Complete
	<ul style="list-style-type: none"> <li>Are there areas that can be improved by utilizing USA Staffing Onboarding features?</li> </ul>		
Forms	<ul style="list-style-type: none"> <li>Have all forms that need to be configured in the system been identified and provided to the account manager?</li> <li>Has your agency completed the Forms Configuration Spreadsheet for all forms, including those that will be transmitted to eOPF?</li> </ul>	60-120 days	
Tasks & Workflows	<ul style="list-style-type: none"> <li>Have tasks been identified for your agency's onboarding process?</li> <li>Has your agency identified tasks that can be grouped together and assigned as workflows to facilitate the onboarding process for Human Resource (HR) Users and New Hires?</li> </ul>	30-60 days	
Notification Templates	<ul style="list-style-type: none"> <li>Has your agency created standard offer letters?</li> <li>Has your agency identified any additional New Hire communications that can benefit from the use of a template?</li> </ul>	30-60 days	
eOPF Approved Forms	<ul style="list-style-type: none"> <li>Does your agency intend to leverage USA Staffing's capability to send files to eOPF?</li> <li>Does your agency have a list of approved forms from its eOPF coordinator?</li> <li>Are there any other forms/documents that need to be sent through eOPF?</li> </ul>	30-60 days	
eOPF Self-Certification	<ul style="list-style-type: none"> <li>Has your agency participated in eOPF self-certification for transmission of forms from USA Staffing?</li> <li>Did your agency complete the certification forms?</li> </ul>	30-60 days	
eOPF Instance Setup	<ul style="list-style-type: none"> <li>Has your agency determined how long after EOD the eOPF folder will be created?</li> <li>Does your agency service another organization that would require transmission of forms and documents to another instance?</li> </ul>	15-30 days	
Users Identified	<ul style="list-style-type: none"> <li>Has your agency identified the individuals who will need access to USA Staffing?</li> <li>Are there any additional users in your agency who will need access to be a part of the onboarding process?</li> <li>Have Administrators been identified for your agency? Have they received training?</li> </ul>	15-30 days	

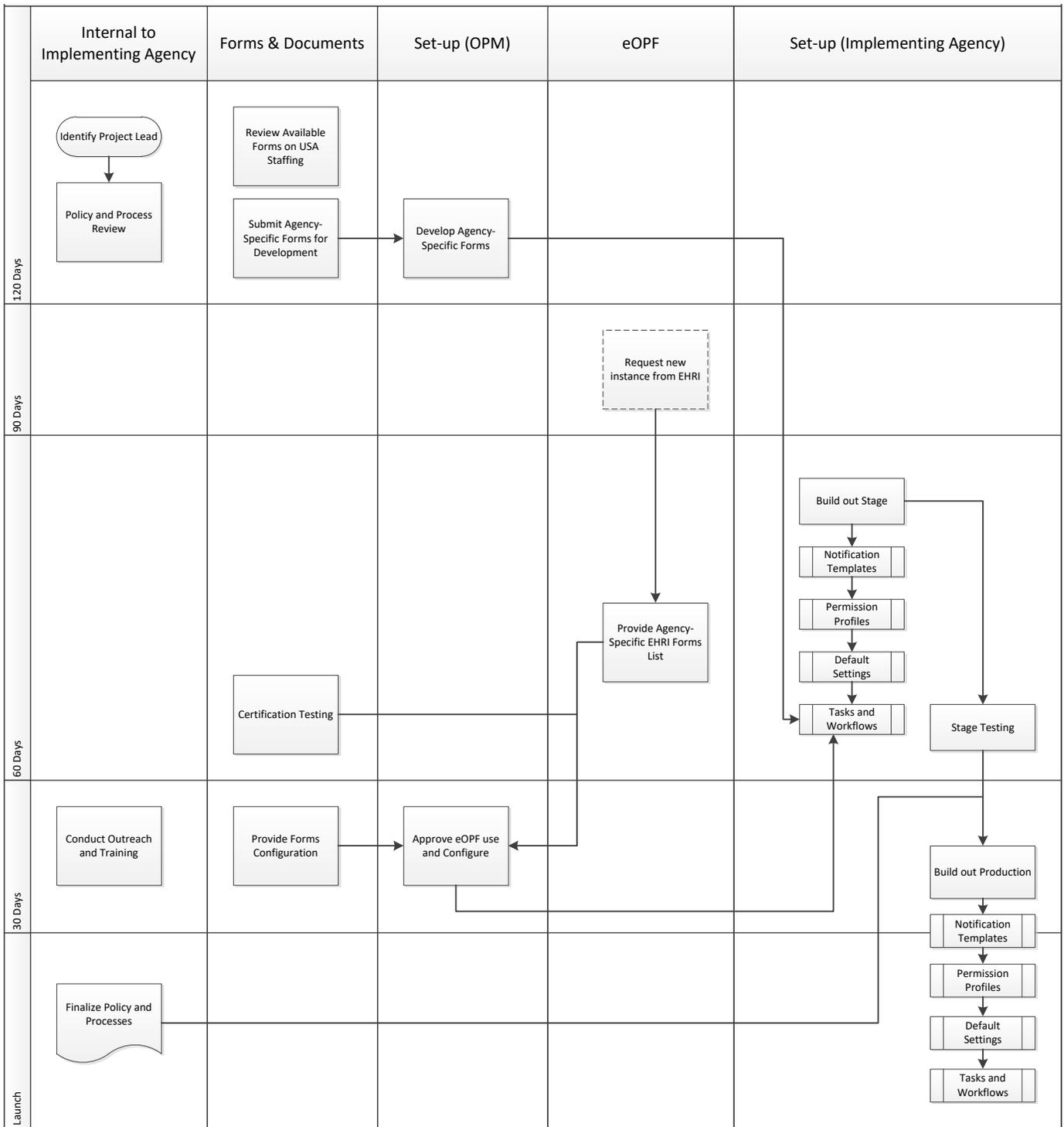
Item	Description	Recommended Timeframe	Complete
	<ul style="list-style-type: none"> <li>Have agency-specific training or resource materials been made available as appropriate for stakeholders?</li> </ul>		
Organization, Offices & Customers	<ul style="list-style-type: none"> <li>Has the proper office and customer structure been identified for your organization and created in the Stage environment for testing?</li> </ul>	15-30 days	

## Next Steps

We trust this Implementation Guide will serve as a starting point for your internal discussions regarding implementation. Your Account Manager will review this guide with your agency and will be available to help you navigate the activities identified within.

Please let us know if there are additional steps we can take to assist your agency in its decision-making and planning process in order to successfully implement the Onboarding features available in USA Staffing.

# Appendix A – Implementation Roadmap



## Appendix B – Sample Workflows

We have identified sample workflows that can be used for various phases of your onboarding process. The sample workflows are based on best practices and what many customers have found successful. They can be used by your agency as a starting point to help as you think through your onboarding process.

Initiate Onboarding/Tentative Job Offer (TJO)	
HR Tasks	New Hire Tasks
Send Tentative Offer	Sign and Submit OF-306
Receive Tentative Offer Response	
Review NH Overview Tab	
Verify the New Hire Arrived for their First Day of Duty	
Initial Suitability/Security Evaluation	

**\*Required**

Security	
HR Tasks	New Hire Tasks
Initiate Security (if required)	Complete Fingerprinting
Initiate Fingerprinting	Complete Security Forms

Drug Testing	
HR Tasks	New Hire Tasks
Initiate Drug Testing	Complete Drug Testing
Retrieve Drug Testing Results	

Establish EOD	
HR Tasks	New Hire Tasks
Negotiate EOD	
Request SF-75 and TSP-19, if applicable	
Receive SF-75 and TSP-19, if applicable	
Send Official Offer	
Receive Official Offer Response	

Entrance on Duty (EOD)	
HR Tasks	New Hire Tasks
Return OF-306 to selectee for additional signature	Complete I-9, Employment Eligibility Verification Complete SF-61, Appointment Affidavit
	Complete USAS EDU-01, New Employee Educational Data Form
	Complete SF-181, Ethnicity and Race Identification
	Complete SF-144 Statement of Prior Federal Service
	Complete SF-256, Self Identification of Disability
	Complete Direct Deposit Form
	Complete W-4 - Employee's Withholding Allowance Certificate
	Complete State Tax Withholding form, if applicable
	Sign and Submit OF-306

**EOD Benefits and Compensation**

<b>HR Tasks</b>	<b>New Hire Tasks</b>
Verify all Forms have been completed	Complete DG 60, Federal Employees Health Benefits Premium Conversion Waiver/Election Form
Verify all Documents have been completed	1199A Direct Deposit Form or FMS Direct Deposit Form
	Complete TSP-1, Thrift Savings Plan Election Form
	Complete TSP-3, Thrift Saving Plans Designation of Beneficiary
	Complete W 4, Federal Tax Withholding Allowance Certificate
	Complete SF 1152, Unpaid Compensation of Deceased Civilian Employee Designation of Beneficiary
	Complete SF 2823, Federal Employees Group Life Insurance (FEGLI) Designation of Beneficiary
	Complete SF 3102, Federal Employees Retirement System (FERS) Designation of Beneficiary

Post-EOD	
HR Tasks	New Hire Tasks
Retrieve and Upload New Hire documents that require a wet signature (e.g. SF-1152, SF-2823, SF-3102)	
Verify all documents have correct Document Type	
Initiate e-Verify	
Retrieve e-Verify results	
Transmit Documents and Forms to eOPF	

\*This task is required in order to create a New Hire record in a non-vetting status.