OPM | USA Staffing

Onboarding Workgroup

July 24, 2024











Agenda

- Recently Added Functionality
- Current & Upcoming Development Priorities
- Open Questions/Demo & Reminders



Icebreaker: Summer heat got me like...









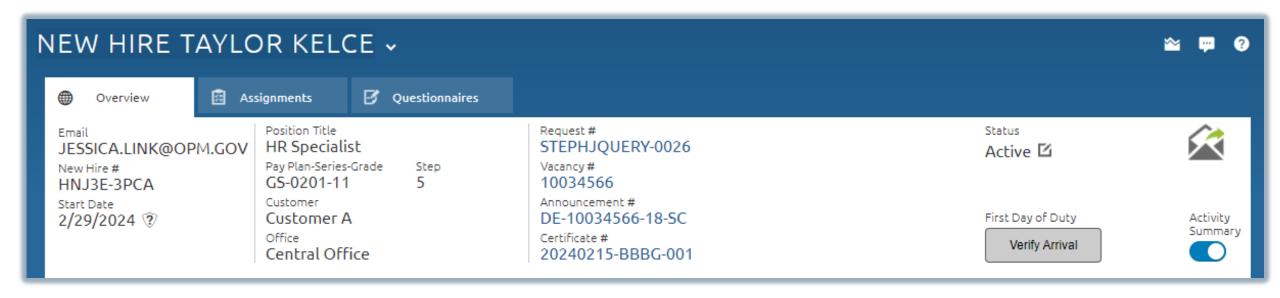




Recently Added Functionality

- New Hire Header and Overview Redesign
- Selective Service System Interconnection: Refresh Result
- Social Security Number Verification Field

Redesign of the New Hire Header



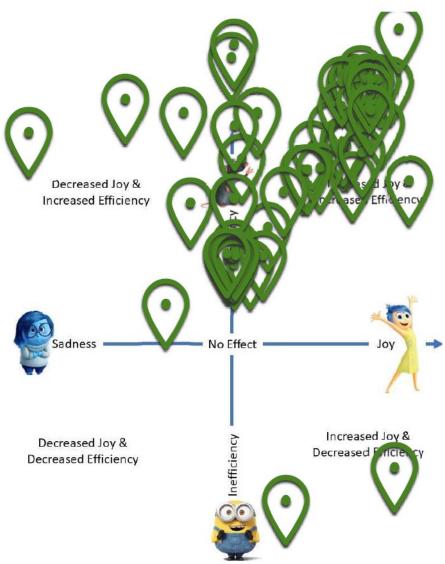
Data points added:

- Start Date
- Position Title
- PP-Series-Grade, Step
- Office

- Req #, Vacancy #, Annct #, Cert #
- Verify Arrival Button
- New Hire Activity Summary Toggle



Poll: How has the new hire header redesign affected your experience using USA Staffing?

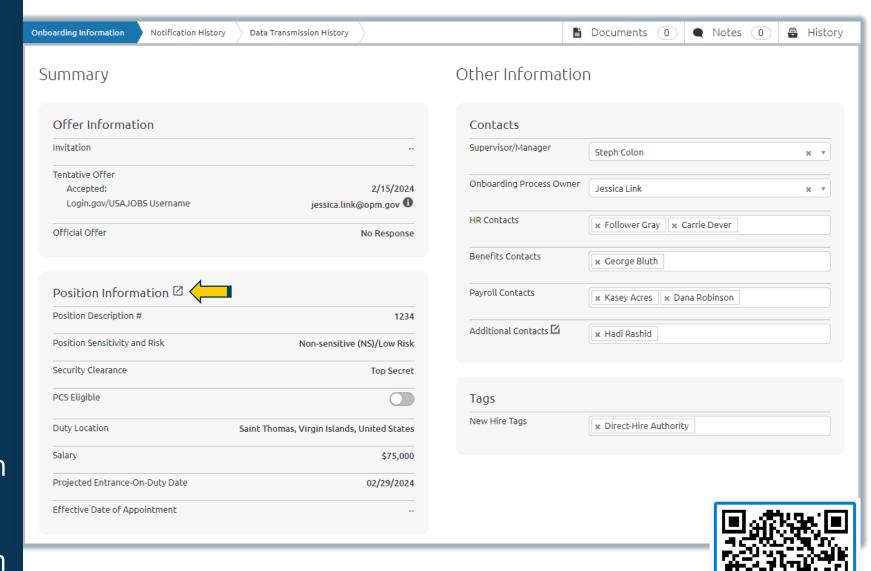


Redesign of the New Hire Overview

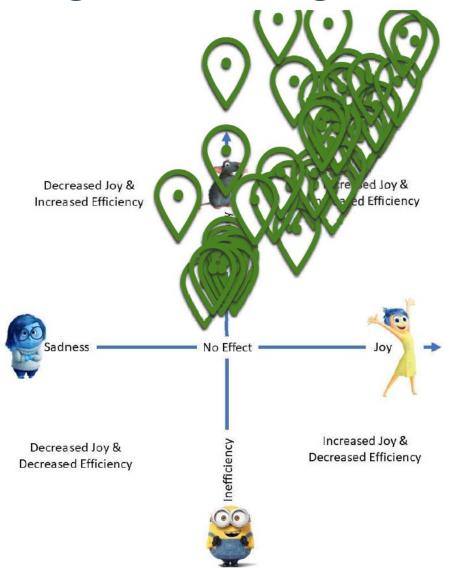
Added

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

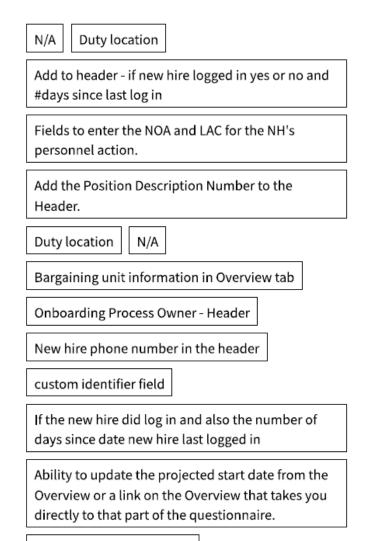
Directly access the Position Information Questionnaire using the icon next to Position Information section title.



Poll: How has the new hire overview redesign affected your experience using USA Staffing?



Poll: What other information would be helpful to display on the New Hire Overview or Header?

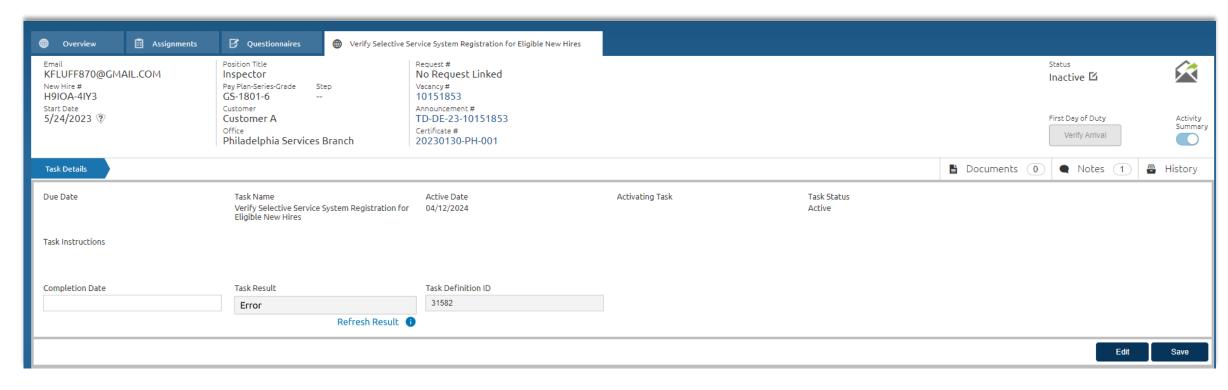


internal/external identifier

Clarification or additions in chat:

- Internal/External a way to track whether the new hire is internal to the agency or external
- Customer Identifier a text field that agencies can use to input custom identifiers they use to track hires such as FTE/PIN #'s
 ***And be able to report on both fields.
- Would like to see information on when the offers were issued [versus having to look under the notification history] added to the overview offer information section.

Selective Service System Interconnection: Refresh Result



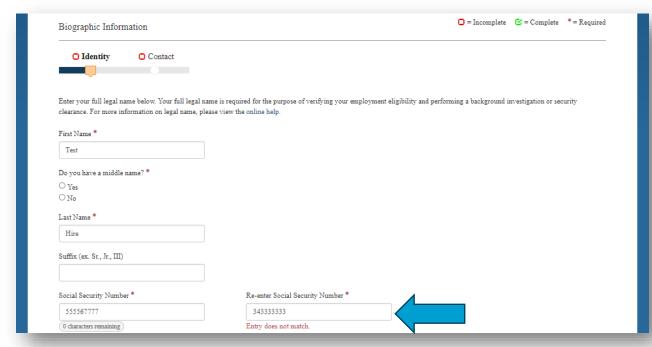
If the interconnection returns "Error – See Notes", users with Edit Task Details permission have one attempt to obtain a new result response.

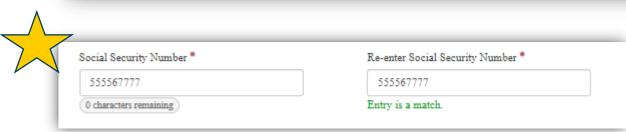
• Users without Edit Task Detail permission will see a disabled button.

A history entry is made to detail who selected Refresh Result with date/timestamp.

Social Security Number Verification Field

- New Hires are required to Reenter SSN in New Hire Questionnaire.
- New Hires <u>cannot</u> copy and paste into new validation field.
- If entry does not match, new hire is unable to "Save and Continue".
- New Hire can proceed once SSN entry is a match.















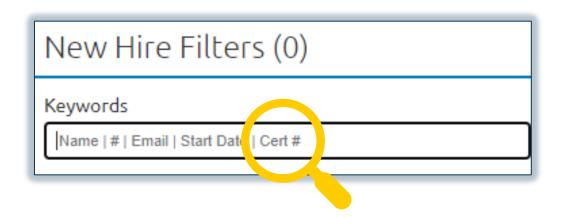
Current & Upcoming Development Priorities

- Mass Onboarding Notifications from New Hires Dashboard
- Multi-select Filtering on Tasks and New Hires Dashboards
- Text Message of Tentative Job Offer
- Select Task Owner during the Staffing and Onboarding Process
- New Hire record changes when Requester is changed

Mass Onboarding Notifications from New Hires Dashboard

Step 1 – Search by Cert

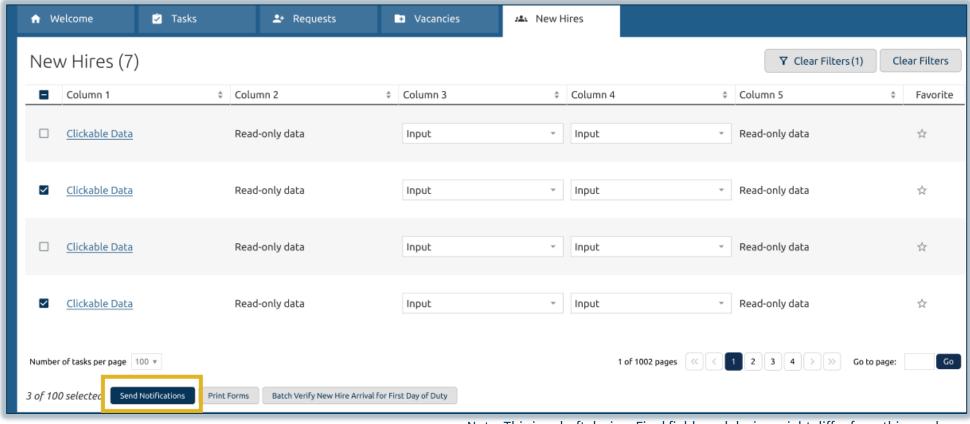
- Recently added ability to search by certificate number on the New Hires Dashboard.
- Will list all new hires created from that certificate; both in 'Vetting' and 'Selected' audit status.



Mass Onboarding Notifications from New Hires Dashboard

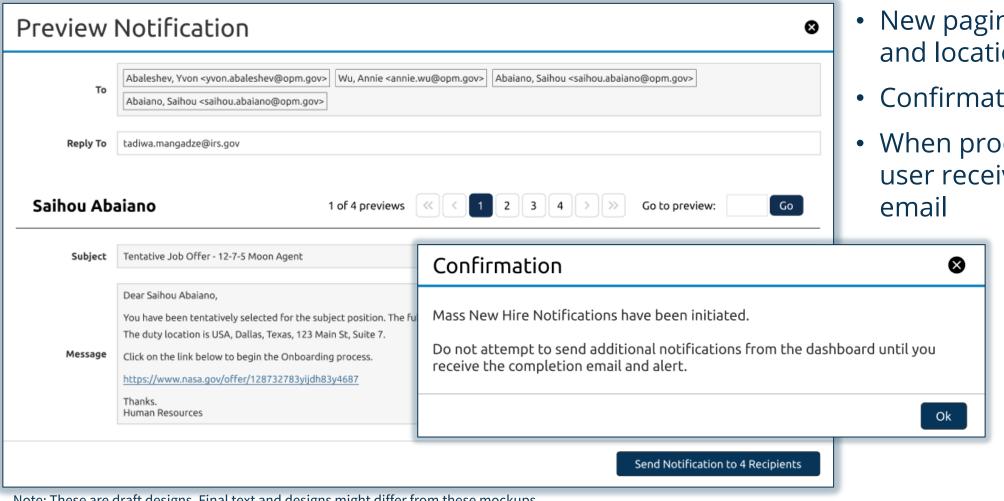
Step 2 – Replicate current functionality from certificate

- Select new hires across pages
- Send Notifications button
- Select onboarding notification template
 - Invitation
 - Tentative Offer
 - Custom



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

Mass Onboarding Notifications from New Hires Dashboard



- New pagination bar design and location
- Confirmation modal
- When process is complete, user receives system alert and

Tentatively Available on:

Stage: 8/30/24 Production: 9/20/24



Note: These are draft designs. Final text and designs might differ from these mockups.

Poll: How do you anticipate the upcoming mass notification from the New Hires dashboard functionality will affect your experience using USA Staffing?

Response Options	Count	<u>Percentage</u>
This is huge for us!	0	0%
Seems positive, but too early to tell	28	78%
No opinion	8	22%
This will make things a little worse for us	0	0%
Ugh, I hate it	0	0%

Multi-select Filtering on Tasks and New Hires **Dashboards**

Users will be able to select multiple filters in certain fields to further refine results.

Tasks

Status

Owner

Type

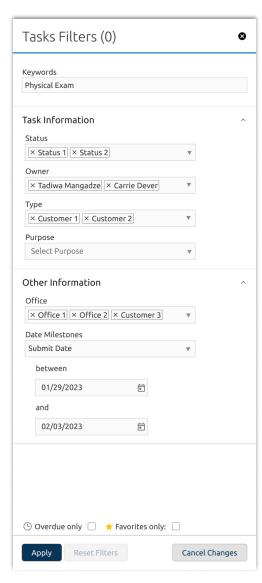
New Hires

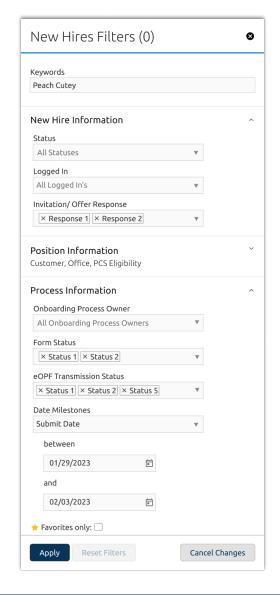
- Status
- Invitation/Offer Response
- Customer
- Office Office
 - Onboarding Process Owner
 - Form Status
 - eOPF Transmission Status

Tentatively Available on:

Stage: 8/30/24

Production: 9/20/24







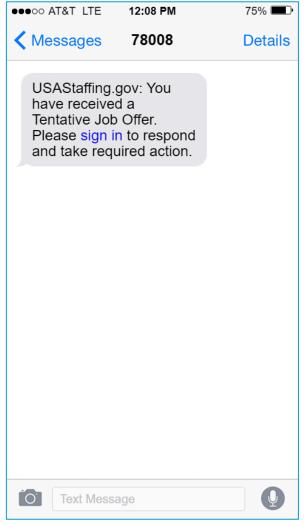
Poll: How do you anticipate the upcoming multi-select filters on the Tasks and New Hires dashboards functionality will affect your experience using USA Staffing?

Response Options	Count	<u>Percentage</u>
This is huge for us!	7	33%
Seems positive, but too early to tell	9	43%
No opinion	3	14%
This will make things a little worse for us	1	5%
Ugh, I hate it	1	5%

Text Message of Tentative Job Offer

Opted-in New Hires will receive a text message when a Tentative Job Offer is sent, in addition to the standard email notification they receive today.

- New Hires opt-in via their USAJOBS profile.
- A default will be added to the Onboarding Defaults page at the Customer level in Admin as well as a toggle at the new hire level.







Poll: How do you anticipate the upcoming Tentative Job Offer text message functionality will affect your experience using USA Staffing?

Response Options	Count	<u>Percentage</u>
This is huge for us!	20	43%
Seems positive, but too early to tell	22	47%
No opinion	5	11%
This will make things a little worse for us	0	0%
Ugh, I hate it	0	0%

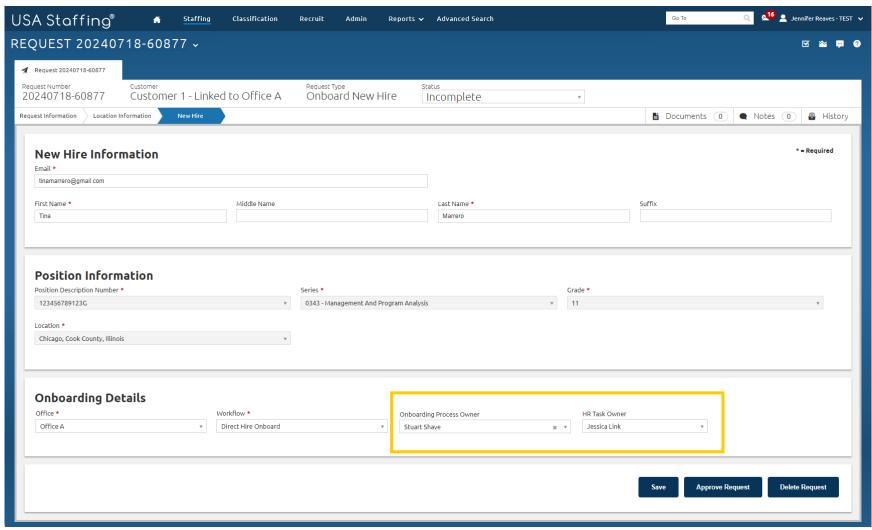
A Problem to Solve: Task Ownership

When a request is approved, a new hire created from a certificate, or a workflow/task added to new hire, USA Staffing auto-assigns the user who takes the action as the HR Task owner.

These business rules do not align with many agencies' method of assigning work, so tasks are often mis-assigned. Without accurate business rules or an efficient way to reassign tasks to the correct owner, tasks are not helpful in tracking workloads.

Select Onboarding Process Owner & Task Owner when approving a New Hire Request

Save time and effort by identifying the Onboarding **Process Owner** and owner for HR tasks before the request is approved.



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

Poll: How do you anticipate the upcoming ability to define the Onboarding Process Owner at Request Approval functionality will affect your experience using USA Staffing?

Response Options	Count	<u>Percentage</u>
This is huge for us!	9	24%
Seems positive, but too early to tell	20	54%
No opinion	7	19%
This will make things a little worse for us	0	0%
Ugh, I hate it	1	3%

Poll: How do you anticipate the upcoming ability to define the Task Owner at Request Approval functionality will affect your experience using USA Staffing?

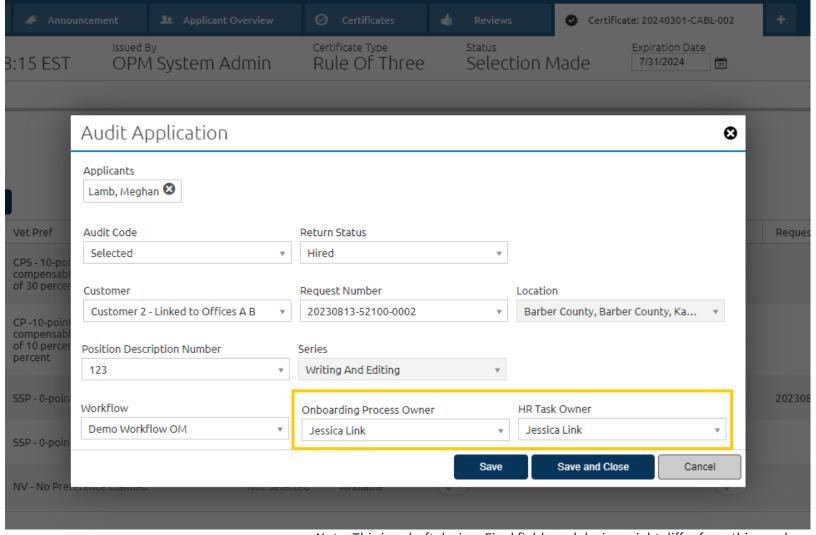
Response Options	Count	Percentage
This is huge for us!	10	31%
Seems positive, but too early to tell	16	50%
No opinion	5	16%
This will make things a little worse for us	0	0%
Ugh, I hate it	1	3%

Clarification or additions in chat:

- For our agency, we would really like the ability to assign contacts to tasks within workflows in admin. That way, when we assign the workflow the correct contacts are auto-assigned.
- AF's issues are some HR Tasks are completed by AFPC or AFMC Staffers and others are completed by the HR Folks at the base level Personnel Offices.

Select Onboarding Process Owner & Task Owner when Auditing a Selection

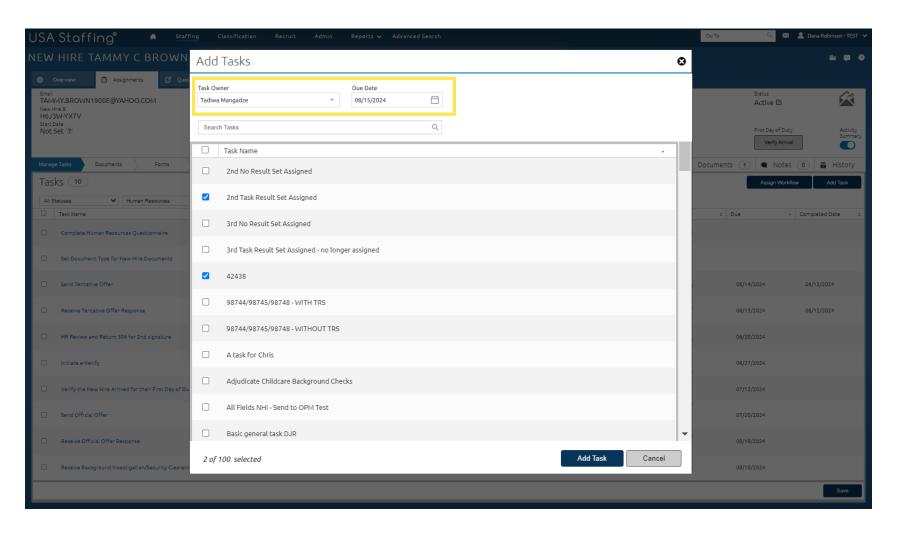
Save even *more* time and effort by identifying the Onboarding Process Owner and owner for HR tasks when auditing a selection from a certificate.



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

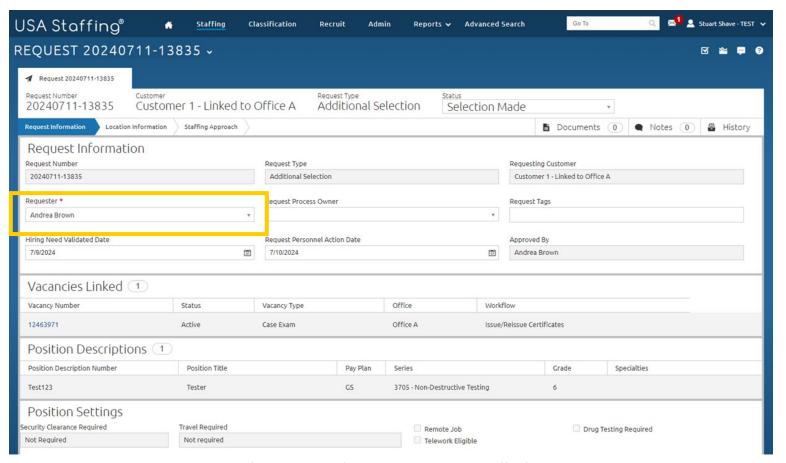
Select Task Owner when adding Workflow and/or Task to existing New Hire

Allow users to designate the task owner when the task or workflow is added to the new hire record so you can align ownership with your agency's business process.



When Requester is changed, New Hire record may change

When the Requester is changed, if the Supervisor/Manager has not already changed within the new hire record, the field will be updated to match the Request.



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

Example: New Hire record may change when Requester is changed

When the Request State = Selection Made

Scenario A: Supervisor/Manager <u>changed in the NH record before</u> Requester changed in the Request.

Request > Requester		New Hire Record > Supervisor / Manager		
	Original	Current	Original	Current
7/1/2024	Billy Grind	N/A	Billy Grind (Pulled in from Request)	Sevi Flora (Changed in record)
7/2/2024	Changed	Sam Shave	N/A	Sevi Flora

Scenario B: Supervisor/Manager <u>unchanged in the NH record before</u> Requester changed in the Request.

Date	Request > Requester		New Hire Record > Supervisor / Manager	
	Original	Current	Original	Current
7/1/2024	Lessy Jink	N/A	Lessy Jink (Pulled in from Request)	No change
7/2/2024	Changed	Dana Miller	N/A	Dana Miller (Pulled in from Request)

Poll: When the Requester (i.e., Hiring Manager) is changed in a Request, should the corresponding New Hire record Supervisor/Manager be automatically updated to match?

Response Options	Count	<u>Percentage</u>
Always update the Supervisor/Manager entry to reflect the newly assigned Requester, even if I've already changed the new hire record	7	19%
Match the change to the Requester, only if I have not changed the New Hire's Supervisor/Manager entry	14	39%
Never update the New Hire record automatically – I want that change to be made by a person	8	22%
Not sure	6	17%
None of the above – I have an alternative idea	1	3%











Open Questions/Demo & Reminders

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











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

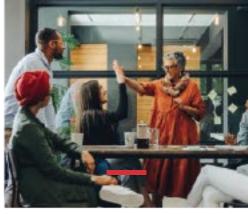
Search for information by Page and by Task

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

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Thank you for joining us!









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







USA Staffing Onboarding Workgroup July 24, 2024 Questions and Answers

Mass Onboarding Notifications from New Hires Dashboard

- 1. We have a service center that onboards new hires based on EOD can we also send mass notifications to that group on the dashboard or only when filtered to certificate number?
 - a. Users can search the dashboard using date milestone filters such as Actual Entry on Duty Date (i.e., EOD). When released to Production, users can send onboarding notifications en masse to any group of filtered new hires as long as the selected new hires have access to the same notification template. Filtering by certificate number may assist when a mass audit is successful and rather than going back to the certificate, you can now send the onboarding notification from the dashboard.
- 2. Would everyone receiving this mass notification also be able to see the email addresses for others?
 - a. No, recipients of the emails do not see others who received the email. This is consistent with the current functionality of mass onboarding notifications from the Certificate area of the system.
- 3. Will the fields for CC and BCC available?
 - a. Not currently. This is consistent with the current functionality of mass onboarding notifications from the Certificate area of the system. The CC field can be set on an individual new hire notification from within the record. This is something we may consider for a future iteration.

Multi-select Filtering on Tasks and New Hires Dashboards

- 1. With the update that was shown, it appears the status field on the New Hire dashboard will default to "All Statuses." With future updates, will this field be a multi-select field, or will it just automatically default to "All Statuses" and we won't have the ability to further filter this field?
 - a. We are not changing the default filter for new hire status; it will remain "Active." However, when we deploy the saved search capability to the dashboards, users will be able to customize their saved searches as they wish. New Hire status will allow multi-select too so you can filter by any combination of available statuses.
- 2. The recent updates to the new hire dashboard filter take longer to bring up an individual new hire. Can you do something about the how long it takes?
 - a. To implement multi-select filtering, we had to modify the stored procedures used to populate the results on our dashboard tabs. We are currently optimizing those stored procedures and, once on Production, we will continue to monitor and optimize as much as possible.

Text Message of Tentative Job Offer

- 1. Does the new hire opt-in at the profile level or at the offer stage?
 - a. Opting-in happens in the USAJOBS profile. They can opt-in up until the point of Tentative Offer being sent to them. If they opt-in after the Tentative Offer is sent, the system will not trigger a text message is sent.
- 2. Is there concern that the selectee will think this text message is 'spam' or fake/scam? Or since it's being sent along with the email, it should ease people's minds?
 - a. USAJOBS will adhere to all formal requirements from mobile carriers to "welcome" the opted-in new hires at the time of opt-in. This "welcome" message should help drive home the point that this and future texts are not spam.

Text Message of Tentative Job Offer, continued

- 3. Is there a need for a disclaimer when the applicant provides their phone number? The disclaimer "message and data rates may apply?"
 - a. Yes, this will also be included with the welcome message upon opt-in by applicant in their USAJOBS profile.
- 4. Will the mobile friendly pages eventually extend to new hires completing forms on mobile as well?
 - a. That is the goal to allow new hires a full mobile friendly experience on all mobile device types.

Requester Changes Impact New Hire Record Supervisor/Manager

- 1. Was there consideration that managers see the requests that they are assigned to in USAS? If the requester leaves the agency before a selection is made, their replacement will not be able to see that Request until after a selection is made and the requester is changed? Why is this only changed after a selection is made? Why not before?
 - a. We are actively working on allowing you to change the Requester on requests that have been approved to address the exact scenario you describe. In doing so, we want to determine how that change would impact Requests where selections were made and there is a corresponding supervisor/manager on the new hire record.
- 2. Will any changes to the Requester and Supervisor/Manager fields also be tracked in History?
 - a. Yes, these changes will be visible in History both in the Request and in the New Hire record.

Miscellaneous

- 1. I want the ability to update the projected start date from the New Hire overview or a link on the overview that takes you directly to that part of the questionnaire.
 - a. As part of the new hire overview redesign, you can now click the icon in the Position Information section header which will take you directly to the Position Information questionnaire of the record. There you can navigate to the Entry on Duty sub-questionnaire to complete this question.
- 2. Are there any updates coming to the new hire activity summary notifications?
 - a. We do not currently have plans to modify the new hire activity summary. We would be happy to learn more if you have feedback on this functionality. Please consult with your USA Staffing Account Manager.
- 3. Any exploration for having the hiring manager included in activity summary notifications?
 - a. We do not currently have plans to allow hiring managers to receive a new version of the Activity Summary. We would be happy to learn more if you have feedback on this functionality. Please consult with your USA Staffing Account Manager.
- 4. Has the group email been fixed? We were told a while back that we can CC group email addresses, but it isn't working.
 - a. Please report any inconsistencies in the system via FootPrints ticket so research and troubleshooting can occur.