



New Hires Training Exercise 2: Manually Creating a New Hire Record

Now that you have completed the online portion of training for the New Hires area, it is time to log into the Stage environment of USA Staffing to practice what you have learned. Use this step-by-step guide to help you practice this lesson. Retain your notes to assist you with other lessons.

This practice exercise will walk you through manually creating a new hire record.

You can also access the entire practice training series on the USA Staffing Training Resources page at: [https://help.usastaffing.gov/ResourceCenter/index.php/USA Staffing Training Resources](https://help.usastaffing.gov/ResourceCenter/index.php/USA_Staffing_Training_Resources) .

Before you begin this exercise:

- Check with your Office Administrator to ensure there are available onboarding workflows for you to assign to the new hire record.
- Check with your Office Administrator to ensure there are available Tentative Offer notification templates that you can send to the new hire.
- Be sure you have access to the e-mail account you create below for the new hire record.

1. Click the **Create Request** button on the New Hires tab of your dashboard.

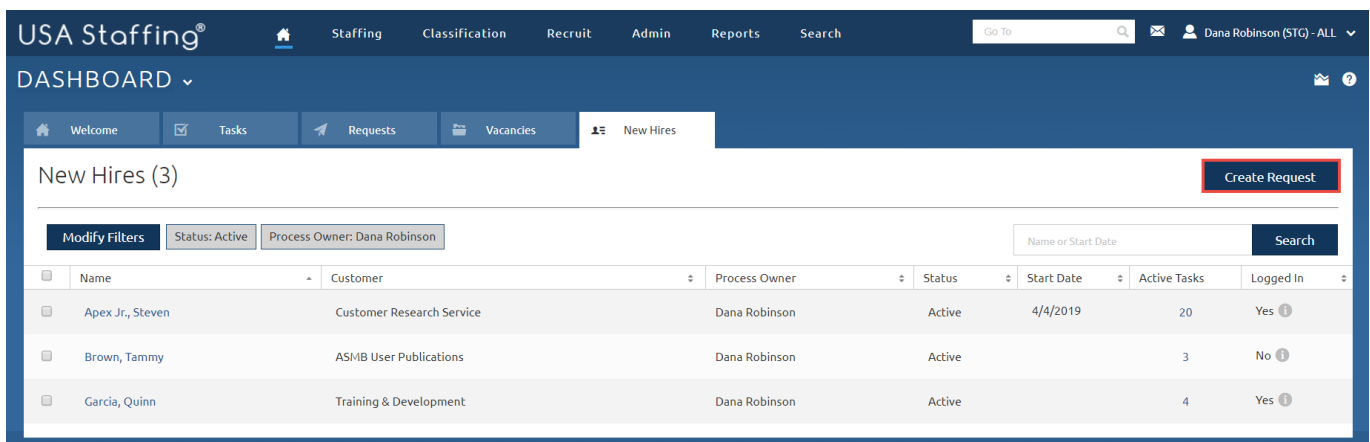


Image 1: New Hires Dashboard with the Create Request button highlighted.

2. Complete the Request Information page.

- a. Click **Generate** or enter an agency specific request number.
- b. Select a **Requesting Customer** from your drop-down list.
- c. Leave the **Request Type** as **Onboard New Hire**.
- d. Select a **Requester** from the drop-down list.
- e. Enter dates for the **Hiring Need Validated Date** and **Request Personnel Action Date** fields.
- f. Add a **Position Description Number**.

- g. Enter a **Position Title**.
- h. Leave the **Pay Plan** as **GS**.
- i. Type and select the appropriate number in the **Series** field.
- j. Select the Grade. (You can either type directly in the box and press **Enter** or select them from the drop-down list.
- k. Do not add any **Specialties**.
- l. Select an option for **Security Clearance Required**.
- m. Select an option for **Travel Required**.
- n. Select an option for **Position Sensitivity and Risk Trust Determination Process**.
- o. Select an option for **Trust Determination Process**.
- p. Check the boxes for all other applicable **Position Settings**.
- q. Press the **Save** button.

The screenshot displays the 'Request Information' page in the USA Staffing system. At the top, the navigation bar includes 'Staffing', 'Classification', 'Recruit', 'Admin', 'Reports', and 'Search'. The main header shows the request ID 'REQUEST 20190827-20993'. Below this, a summary bar lists: Request Number: 20190827-20993, Customer: ASMB User Publications, Request Type: Onboard New Hire, and Status: Incomplete. The 'Request Information' section contains fields for Request Number (20190827-20993), Requesting Customer (ASMB User Publications), Request Type (Onboard New Hire), Requester (Damon Carter), Hiring Need Validated Date (8/23/2019), and Request Personnel Action Date (8/26/2019). The 'Position Descriptions' section shows a table with one entry: Position Description # 1234, Position Title Program Analyst, Pay Plan GS, Series 0343 - Management And Program Analysis, Grade(s) x 12. The 'Position Settings' section includes dropdowns for Security Clearance Required (Secret) and Travel Required (Occasional travel), and checkboxes for Telework Eligible, Drug Testing Required, Position Sensitivity and Risk (Moderate Risk (M-R)), Trust Determination Process (Suitability/Fitness), Supervisory Position, Relocation Authorized, Bargaining Unit Position, and Financial Disclosure Required. At the bottom right, there are 'Save', 'Cancel', and 'Delete Request' buttons.

Image 2: Request Information page completed as specified in the above steps.

3. Click the newly activated Location Information tab and complete the Location Information page.
 - a. In the **Find Location** box, type any **City or Zip code** and select the location.
 - b. Enter **1** in the **Vacancies** field that will display.
 - c. Click the **Add Location** button. The selected location will display on the **Locations** table.
 - d. Click **Save**.

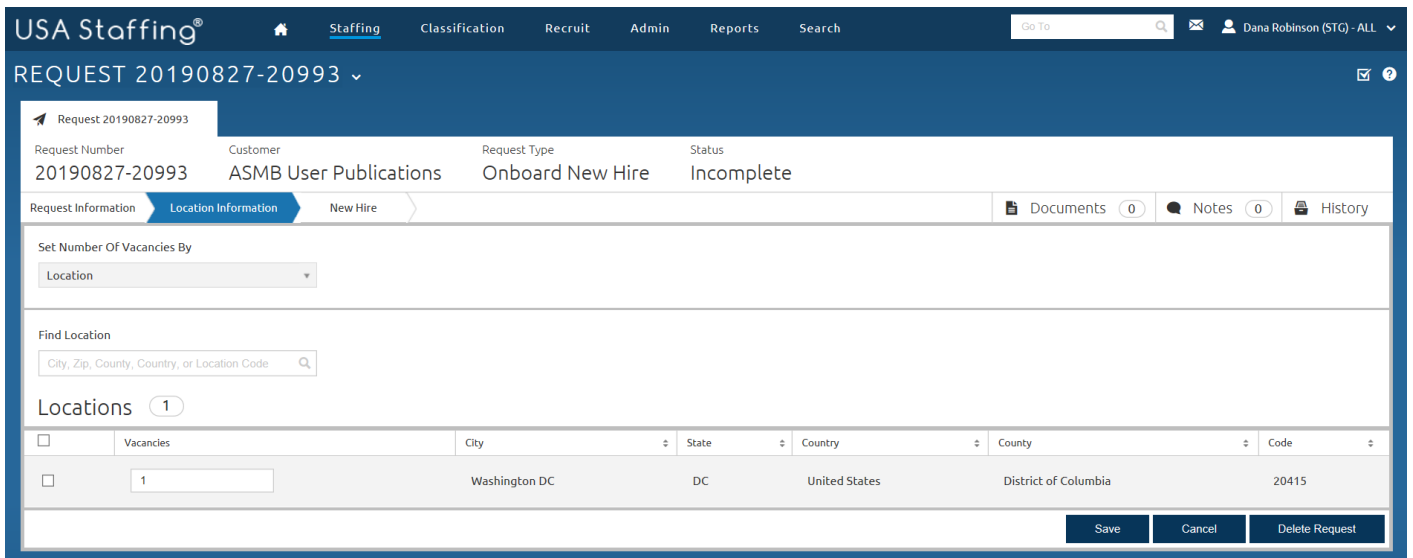


Image 3: Request tab with the Location Information page highlighted.

4. Click the New Hire page and complete the request.
 - a. Enter the **First Name, (Middle Name) and Last Name, (and Suffix if applicable).**
 - b. Enter the new hire's **Email Address.**
 - c. The **Position Description Number, Series, Grade, Location, Office, and Workflow** will automatically populate if there is only one selection in each of these areas. Otherwise, you will need to choose one of the selections for each of these fields.
 - d. Click the **Approve Request** button. (If the **Approve Request** button does not display, click **Save** and contact your Office Administrator on how to proceed. A user with a higher profile permission level will have to approve the request).

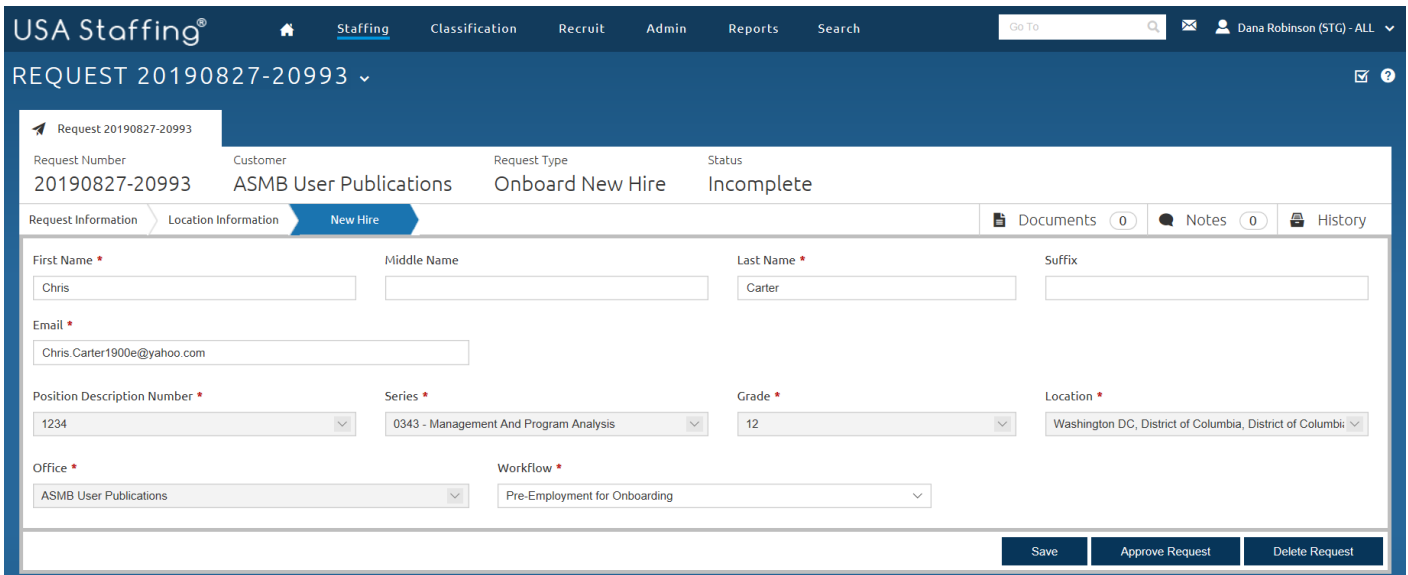


Image 4: Request tab with the New Hire page highlighted.

- The record will generate and the approved request page will display. Based on the information you previously entered, this page will display the **Request Information, Vacancy Created, Position Descriptions, Position Settings, Request Locations, and New Hire** information. Click the **View New Hire** button to open the new hire record.

USA Staffing Staffing Classification Recruit Admin Reports Search Go To Dana Robinson (STG) - ALL

REQUEST 20190827-20993

Request 20190827-20993

Request Number: 20190827-20993 Customer: ASMB User Publications Request Type: Onboard New Hire Status: Selection Made

Request Information Documents (0) Notes (0) History

Request Information

Request Number: 20190827-20993 Request Type: Onboard New Hire Requesting Customer: ASMB User Publications

Requester: Damon Carter Approved By: Dana Robinson

Hiring Need Validated Date: 8/23/2019 Request Personnel Action Date: 8/26/2019

Vacancy Created (0)

Vacancy Number	Status	Vacancy Type	Office	Workflow	USAJOBS Announcement Type	Rating Combination

Position Descriptions (1)

Position Description Number	Position Title	Pay Plan	Series	Grade	Specialties
1234	Program Analyst	GS	0343 - Management And Program Analysis	12	

Position Settings

Security Clearance Required: Secret Travel Required: Occasional travel Telework Eligible Drug Testing Required

Position Sensitivity: Moderate Risk (MR) Trust Determination Process: Suitability/Fitness Supervisory Position Bargaining Unit Position

Relocation Authorized Financial Disclosure Required

Request Locations

Vacancies	City	State	Country	County	Location Code
1	Washington DC	DC	United States	District of Columbia	20415

New Hire [View New Hire](#)

First Name: Chris Middle Name: Last Name: Carter Suffix:

Email: Chris.Carter1900e@yahoo.com Office: ASMB User Publications Duty Location: Washington DC, District of Columbia

Position Description Number: 1234 Series: 0343 Grade: 12

Image 5: The Approved Request page that displays the request details.

6. After clicking the **View New Hire** button, you will be directed to the Manage Tasks page of the record. However, you will need to navigate to the Overview page first. Under Contact Information, assign yourself as the **Onboarding Process Owner**. Then, assign yourself or other users as the **HR Contacts**, **Benefits Contacts**, and **Payroll Contacts** and click **Save**. These are the users who will manage the record.
- Note:** If the **HR Contacts**, **Benefits Contacts**, and/or **Payroll Contacts** are already assigned to the record, this means your agency has established automatic defaults for the Contact Information area. You can add additional contact names or remove these names as necessary.

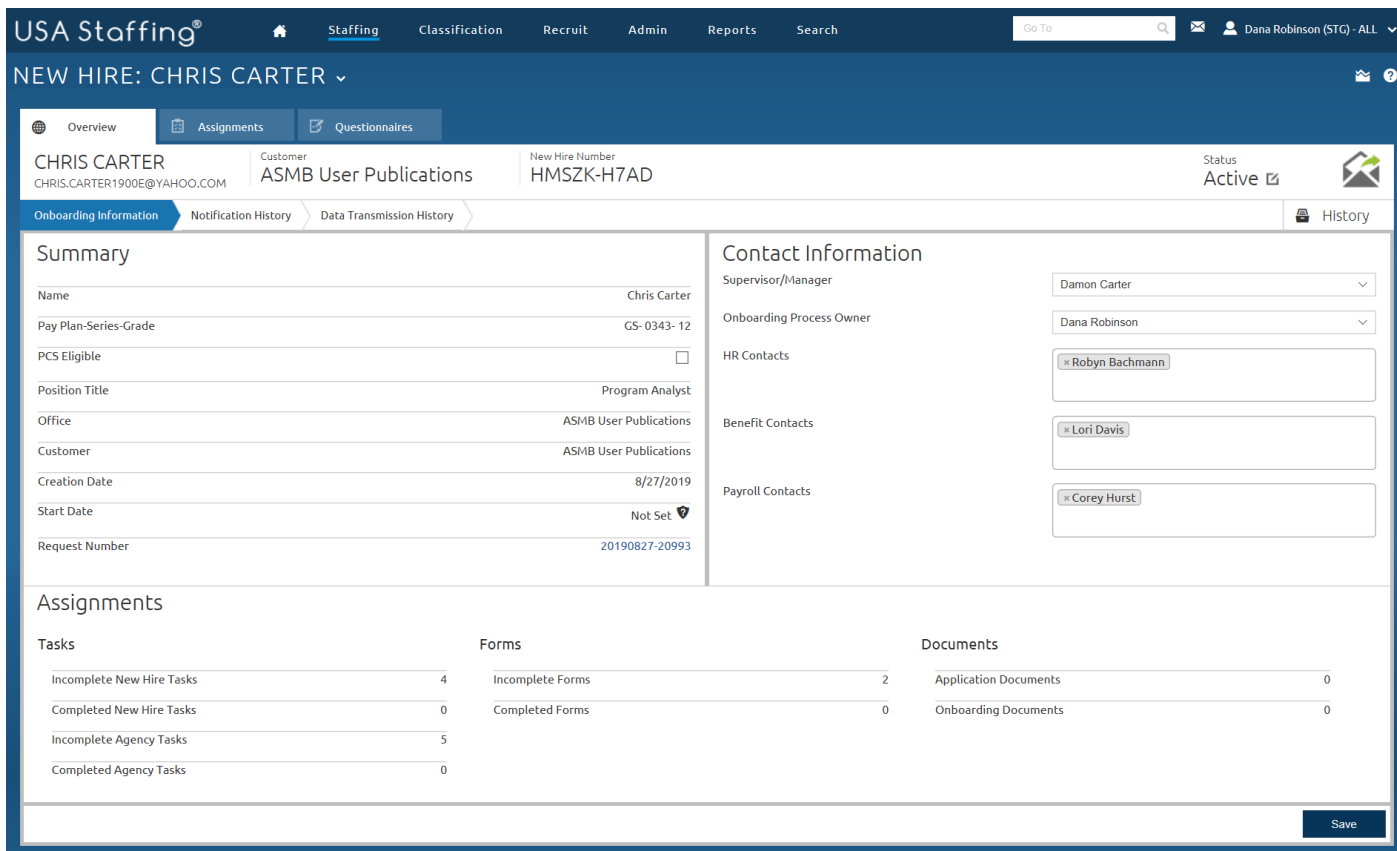


Image 6: Overview page displaying the Contact Information area to assign staff to the record.

7. After assigning contacts to the record, go to the Assignments page where you will begin managing the tasks for the record. You will see tasks already assigned to the record. These tasks were assigned based on the workflow that you selected on the New Hire page of the Request. Click the **Add Task** button to assign another task to this record.

Note: There are two essential tasks that should already be assigned to the record and they are: **Send Tentative Offer** and the **Verify the New Hire Arrived for their First Day of Duty**. If these tasks are not already assigned, add them to the record and click **Save**.

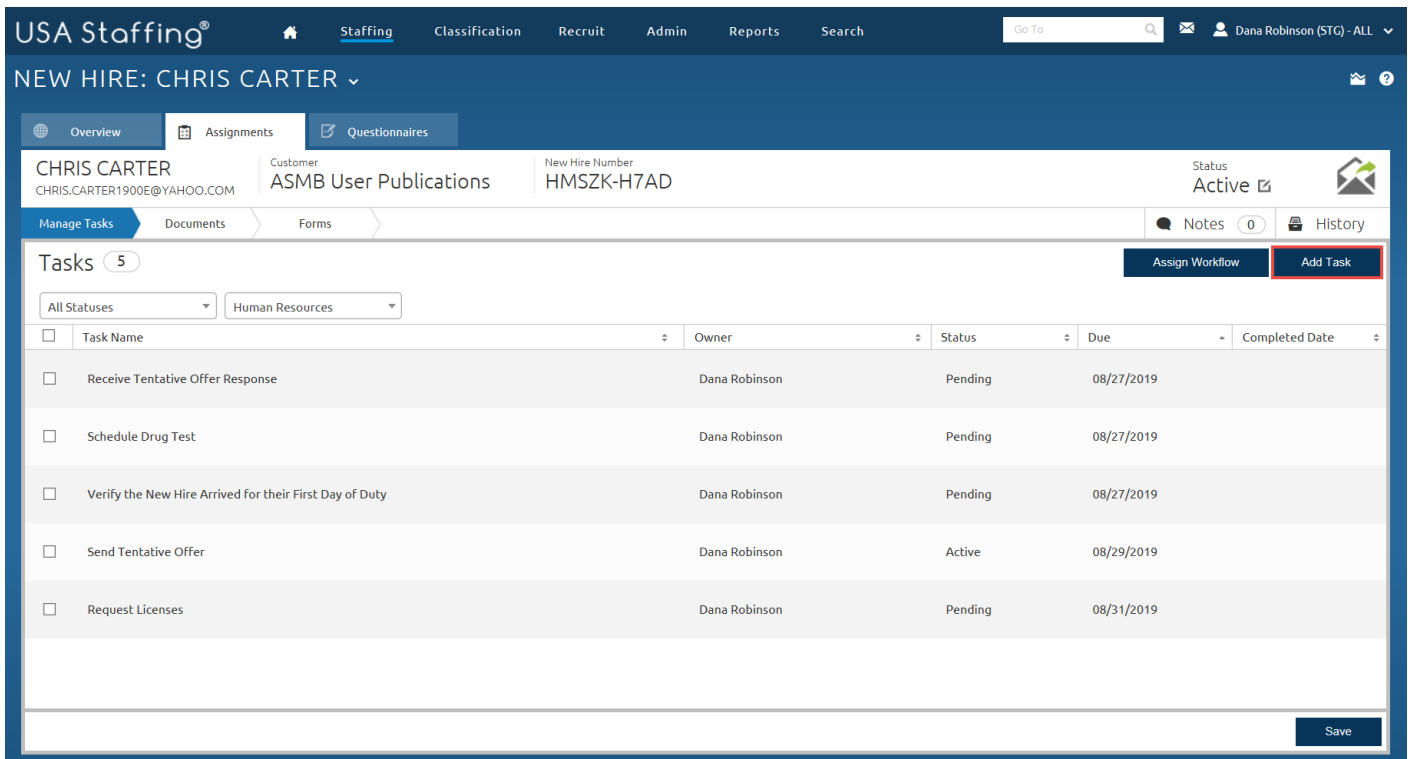


Image 7: A new hire's record is on the Assignments tab with the Manage Tasks page displaying.

8. Select any task and click the **Add Task** button to assign it. After adding the task you will see it displayed on the Manage Tasks page.

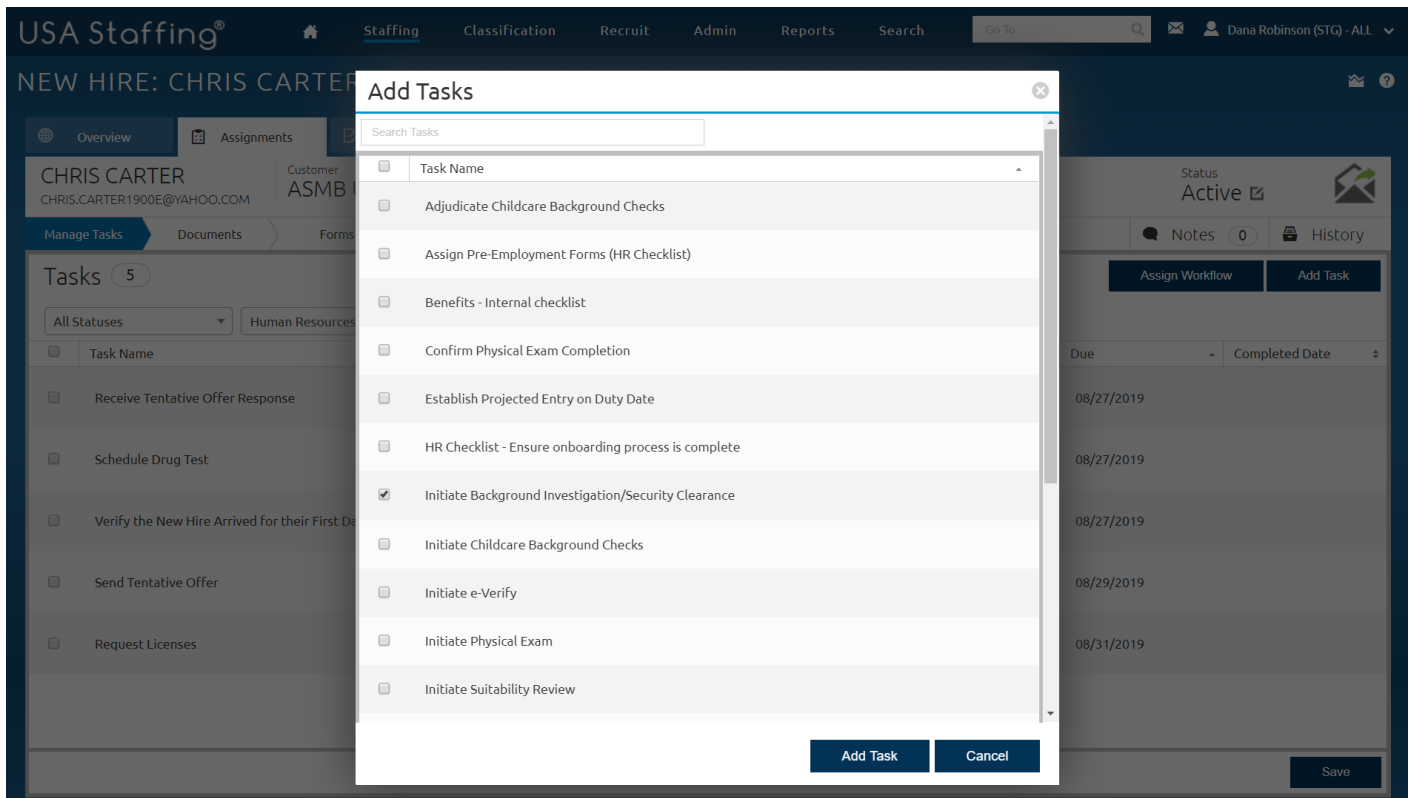


Image 8: A new hire's record is on the Manage Tasks page displaying the Assign Tasks pop-up.

9. Filter the Manage Tasks page to display the **New Hire** tasks. Click the **Assign Workflow** button to assign tasks for the new hire to complete. Remember, workflows are a group of tasks that can be assigned to the record at one time and these tasks have pre-established due dates set by your agency for reporting purposes.

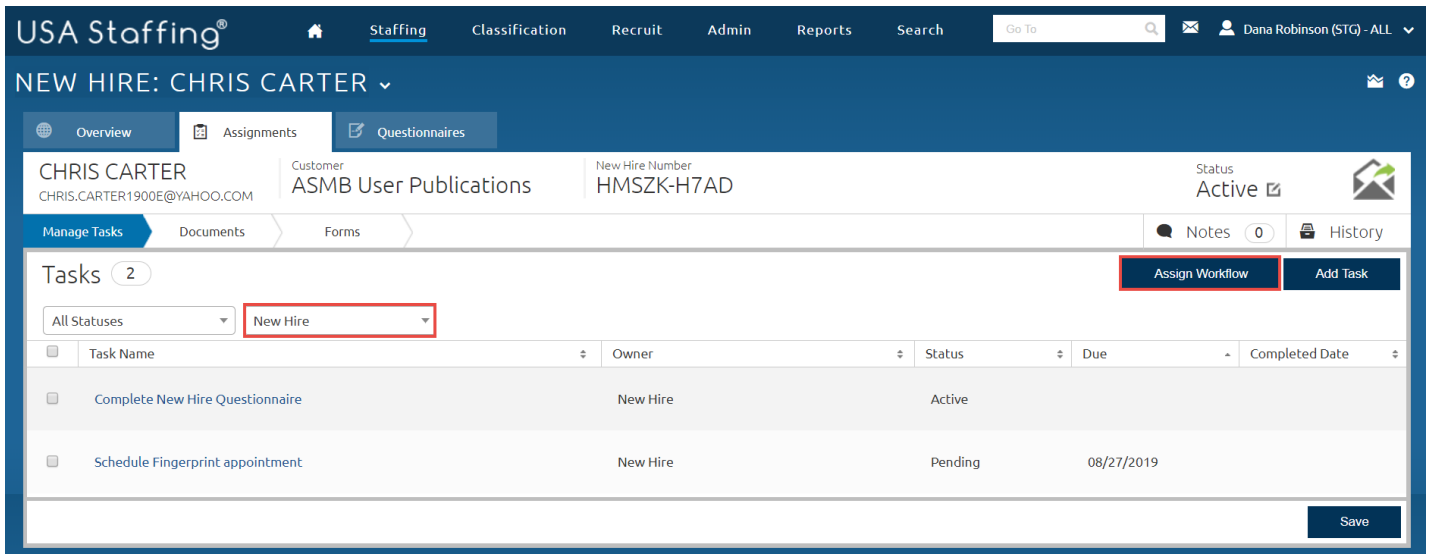


Image 9: A new hire's record is on the Assignments tab with the Manage Tasks page filtered by the New Hire tasks.

10. Select the appropriate workflow and click the **Assign Workflows** button on the pop-up (if you do not have any workflows to select from, inform your Office Administrator that workflows need to be created).

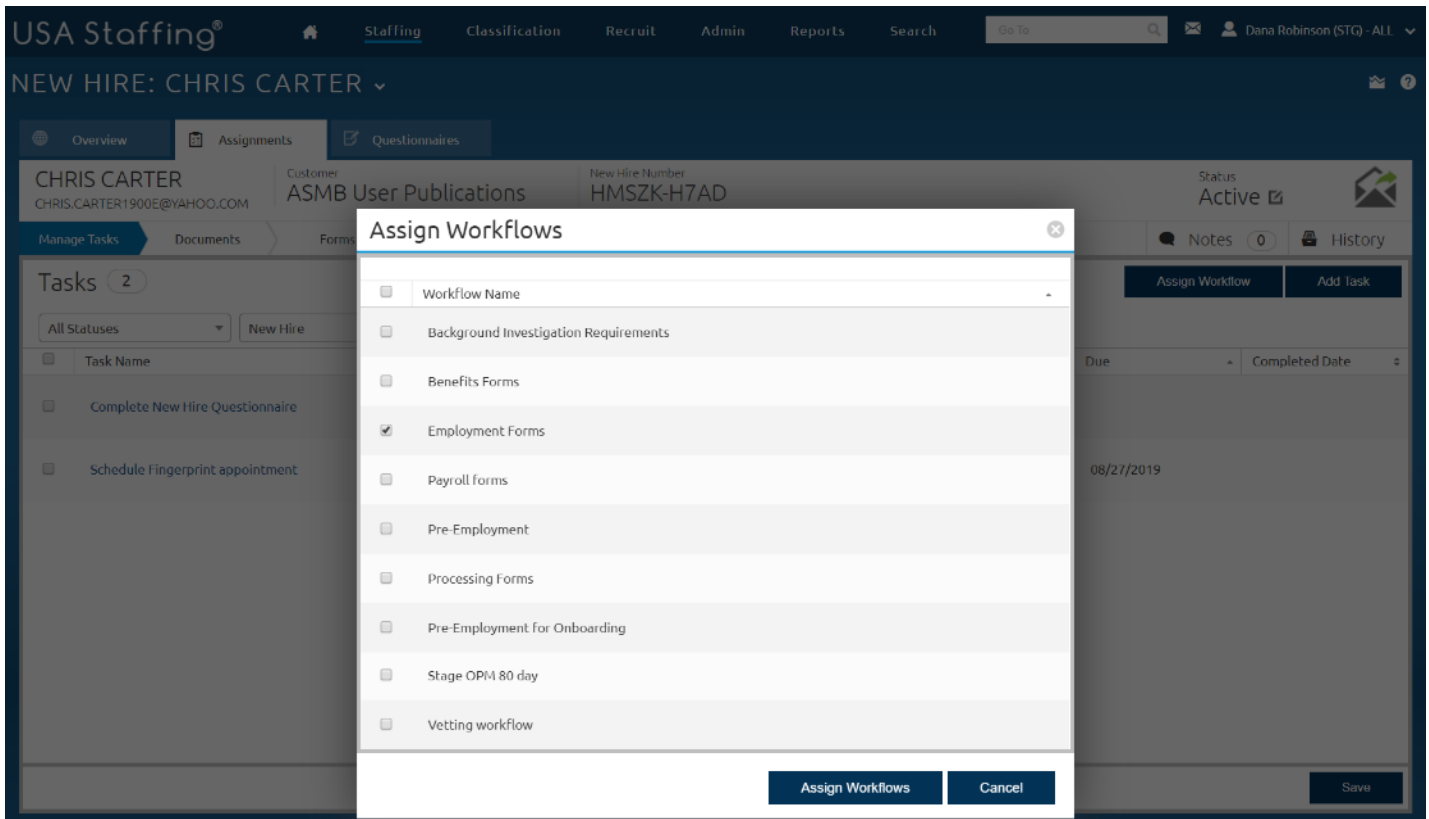


Image 10: A new hire's record is on the Manage Tasks page displaying the Assign Workflows pop-up.

11. The tasks from the workflow are now assigned to the record. Enter a **Due** date for the **Complete New Hire Questionnaire Task** and **Save**.

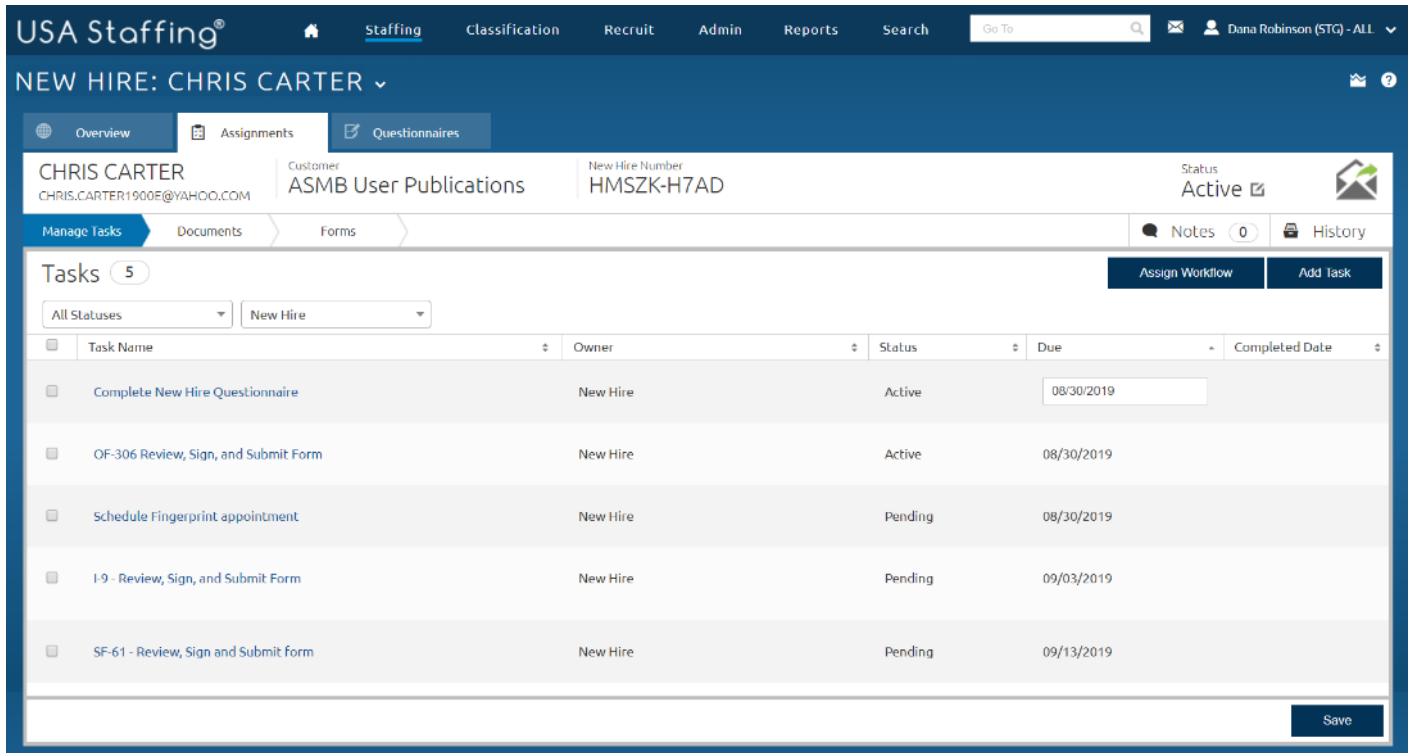


Image 11: A new hire's record is on the Manage Tasks page displaying the tasks assigned from the workflow.

12. Now that tasks are assigned to the record, you are ready to send the job offer to the new hire. Click the **Envelope** icon to initiate sending the job offer notification.

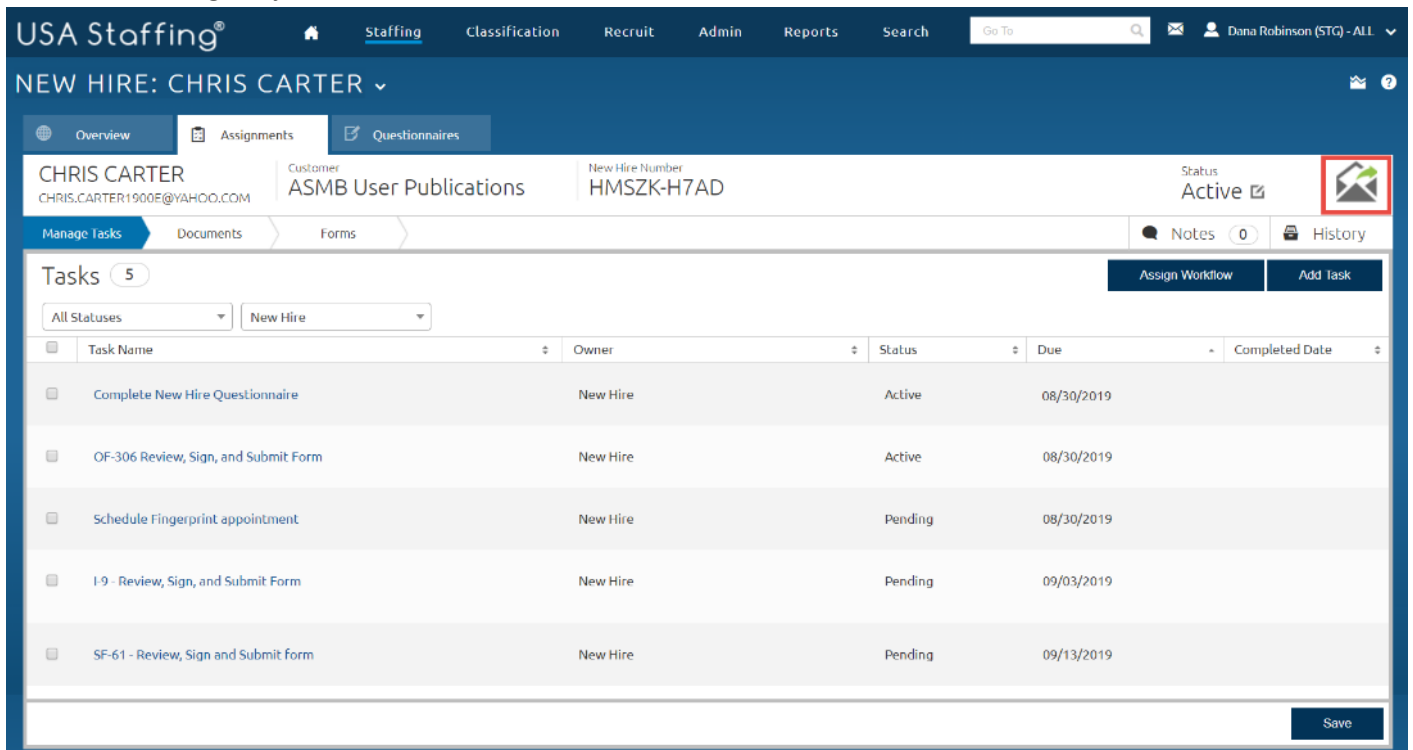


Image 12: A new hire's record is on the Manage Tasks page highlighting the Envelope icon.

13. Select the **Type** of notification that is a **Tentative Offer** (if you do not have a tentative job offer notification to select from, inform your Office Administrator that the notification template(s) needs to be created).

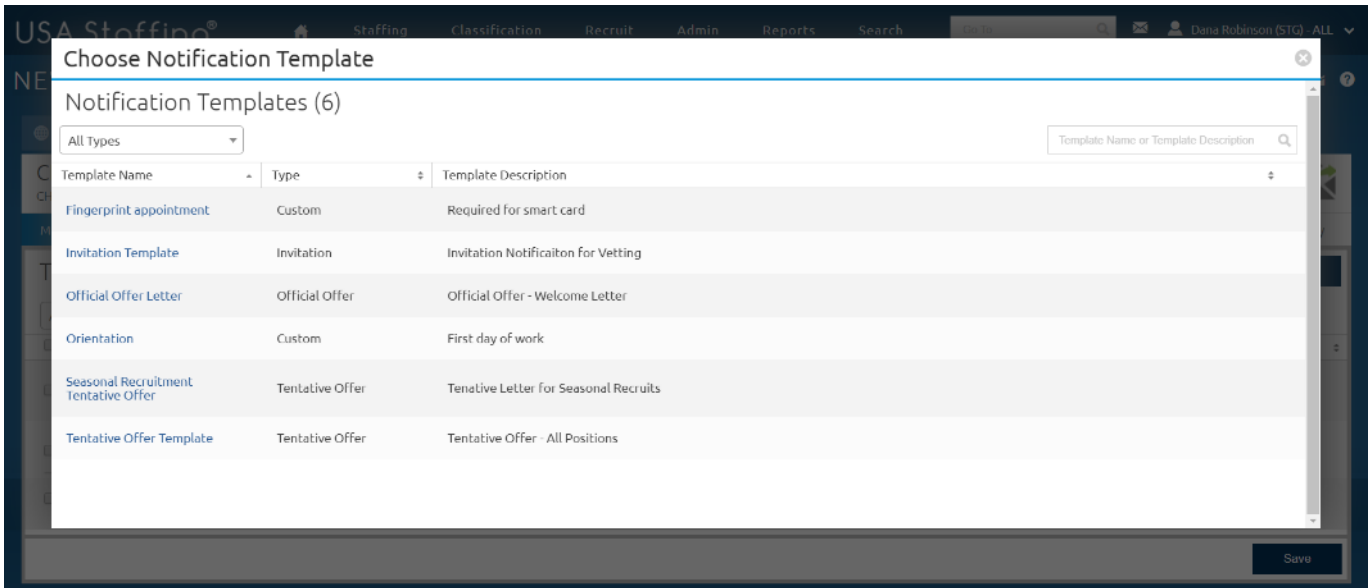


Image 13 The Choose Notification Template page.

14. Click **Send Notification** from the Preview Notification page.

Note: You can click the **Add Attachment** button to add documents before sending. And, you can click **Edit Notification** if you need to modify the text, remove placeholder text, or make other changes before sending the notification.

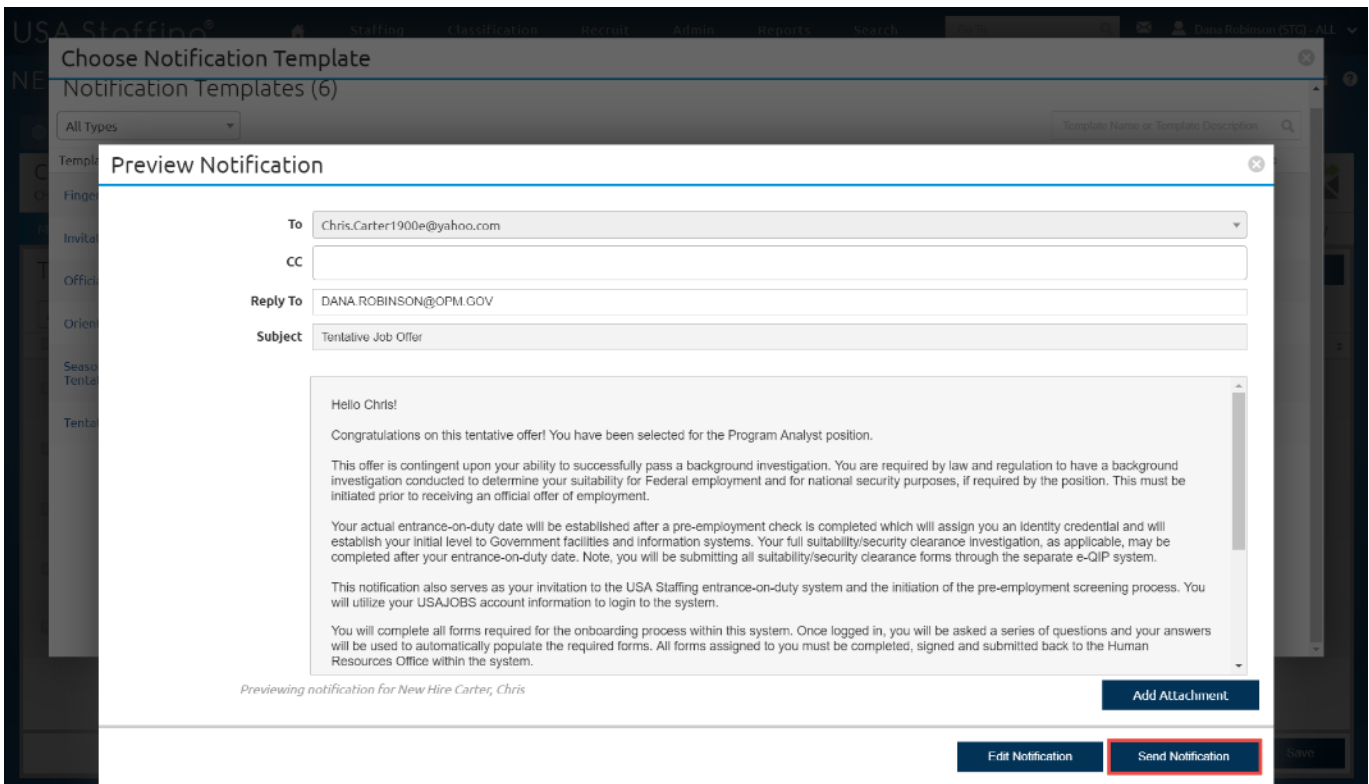


Image 14: The Preview Notification page for the Tentative Offer E-mail.

- After sending the notification, navigate to the Overview tab and open the Notification History page. This page will list the notification(s) that have been sent to the new hire.

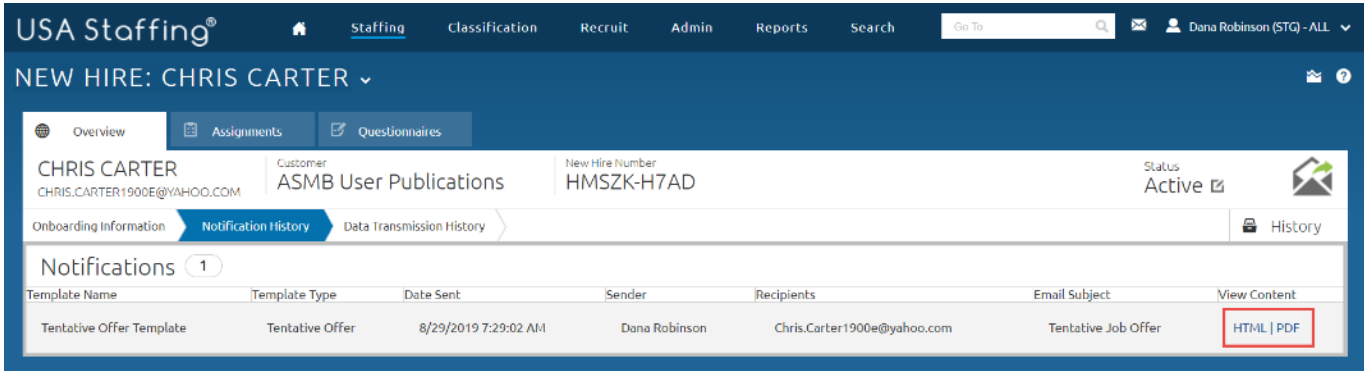


Image 15: The Notification History page listing the sent Tentative Offer E-mail.

- Click the **HTML** or **PDF** link under the **View Content** column to view the contents of the notification you just sent.

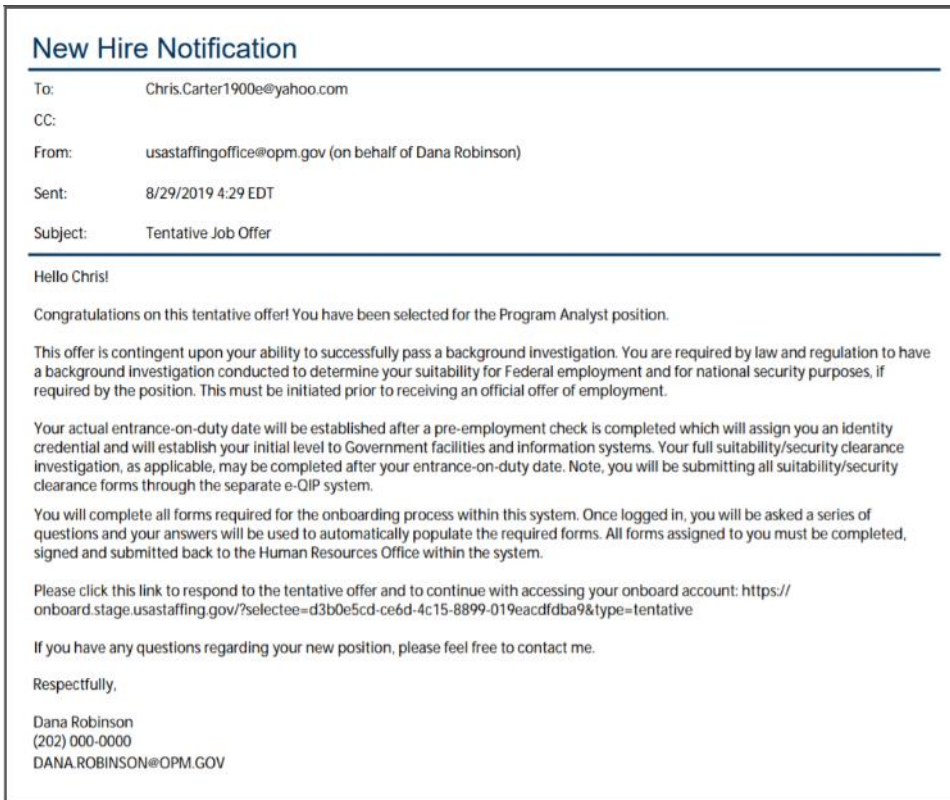


Image 16: Copy of the sent tentative job offer notification.

You have created and approved a request, manually created a new hire record, assigned tasks, and sent the tentative offer to the new hire through the onboarding system.

This concludes the lesson on Creating a New Hire Record Manually.

