

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 .

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.

USA Staffing®	Staffing Classification	Recruit Admin	Reports Search	Go To	۹ 🖂	💄 🚨 Dana Robinson (STG) - ALL 🗸
DASHBOARD 🗸						≌ ?
🚔 Welcome 🗹 Tasks	🛪 Requests 🖀 Vacancies	1 ∃ New Hires				
New Hires (3)						Create Request
Modify Filters Status: Active Pr	rocess Owner: Dana Robinson				Name or Start Date	Search
Name	- Customer	\$	Process Owner	¢ Status ¢	Start Date	ve Tasks Logged In 🗘
Apex Jr., Steven	Customer Research Service		Dana Robinson	Active	4/4/2019	20 Yes 🚯
Brown, Tammy	ASMB User Publications		Dana Robinson	Active		3 No 🚯
🔲 Garcia, Quinn	Training & Development		Dana Robinson	Active		4 Yes 🚯

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 dropdown list.
- k. Do not add any Specialties.
- I. 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.

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REQUEST 20190827-20993 ~							I 3
A Request 20190827-20993							
Request Number Customer 20190827-20993 ASMB User Pub	Request Type Dications Onboard New Hire	Status e Inco	mplete				
Request Information Location Information New Hi	ire				Documents	5 🕕 🗨 Note	s 🕕 🖨 History
Request Information Request Number *	Requesting Customer *			Request Type			* = Required
20190827-20993	ASMB User Publications		Ŧ	Onboard Nev	v Hire		v
Requester * Damon Carter	¥						
Hiring Need Validated Date	Request Personnel Action Dat	te					
8/23/2019	8/26/2019		31				
Position Descriptions 1					In	terdisciplinary 🗖	Add Position Description
Position Description #	Position Title	Pay Plan	Series		Grade(s)	Specialties	
1234	Program Analyst	GS v	0343 - Management And Progra	m Analysis 🔻	× 12	+	
Position Settings Security Clearance Required Trave	l Required						
Secret * Occ	asional travel		🔻 🗭 Telework Eligible		Drug	Testing Required	
Position Sensitivity and Risk Trust	Determination Process *						
Moderate Risk (MR) *	uitability/Fitness		Supervisory Position		🖉 Barga	ining Unit Position	
			Relocation Authorized		Finan	cial Disclosure Required	d
					s	ave Cancel	Delete Request

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.

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REQUES	Т 201908	827-2099	93 ~												☑ ?
🔺 Request 20	0190827-20993														
Request Numb		Customer	er Publicati	ons Onb	_{t Type} oard New	Hire	_{Status} Incomple	ete							
Request Informa	ation Location I	nformation	New Hire	\rangle							Documents 0	Not	es 🕕		History
Set Number O	of Vacancies By														
Location		¥													
Find Location															
City, Zip, Cou	unty, Country, or Loca	tion Code Q													
Location	ns 🔳														
	Vacancies			City		¢	State	¢ Coun	ntry	¢	County		\$	Code	\$
	1			Washingt	on DC		DC	Uni	ited States		District of Columbia			20415	
											Save	Cancel		Delete R	tequest

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).

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REQUEST 201908	827-20993 ~					⊠ ?
A Request 20190827-20993						
Request Number 20190827-20993	Customer ASMB User Pub	Reques	^{st Type} ooard New Hire	_{Status} Incomplete		
Request Information Location I	nformation New Hir	re			🖹 Docum	ents 💿 🗨 Notes 💿 🖨 History
First Name * Chris Email * Chris.Carter1900e@yahoo.com		Middle Name		Last Name * Carter	Suff	ix
Position Description Number *	~	Series * 0343 - Management And P	trogram Analysis	Grade *		ation *
Office * ASMB User Publications	V	Workf	5 ,	12	✓ We	anningion e.o., elsine or conunida, elsine or columbi 🤉
					Save	Approve Request Delete 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.

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REQUEST 20190	827-209	93 ~														☑ ?
Request 20190827-20993																
Request Number 20190827-20993	Customer ASMB Us	er Publica	ations	Request T Onboa		w Hire		Status Selection	Made	v						
Request Information												Document:	s ()		🖨 Hist	tory
Request Informat	ion															
Request Number				Request Ty	/pe						Requesting C	ustomer				
20190827-20993				Onboard	New Hire						ASMB User I	Publications				
Requester				Approved E	By											
Damon Carter				Dana Rob	oinson											
Hiring Need Validated Date				Request Pe		tion Date										
8/23/2019				8/26/201	9											
Vacancy Created	0															
Vacancy Number	Status	Vacan	су Туре		Office		Workflo	ow	USAJO	BS Announcer	ment Type			Rating Combination		
Position Descripti	ons 🕕															
Position Description Number		Position Title				Pay Plan	Ser	ries				Grade	Spec	ialties		
1234		Program Anal	yst			GS	03	43 - Managemen	t And Prog	gram Analysis		12				
Position Settings Security Clearance Required		Travel Req	uired													
Secret		Occasion	al travel						Telewor	k Eligible		Drug	Testing F	Required		
Position Sensitivity		Trust Dete	rmination Pro	cess												
Moderate Risk (MR)		Suitabilit	y/Fitness						Supervi	sory Position		🗹 Barga	aining Un	it Position		
									Relocat	ion Authorized	d	Finar	ncial Discl	osure Required		
Request Locations	s															
Vacancies	City			State		Country				County				Location Code		
1	Washington DC			DC		United S	States			District of (Columbia			20415		
New Hire															/iew New Hir	ire
First Name		Middl	le Name					Last Name				Suffix				_
Chris								Carter								
Email				Office							Duty Location	1				
Chris.Carter1900e@yahoo.com				ASMB Use	er Publicat	ions					Washington	DC, District of Colu	imbia			
Position Description Number				Series							Grade					
1234				0343							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.

USA Staffing® 🔺 Staffing Classil	fication Recruit Admin	Reports Search	Go To	🔍 🖂 💄 Dana R	obinson (STG) - ALL 🗸 🗸
NEW HIRE: CHRIS CARTER 🗸					🗠 ?
🜐 Overview 🖹 Assignments 📝 Questionnaires					
CHRIS CARTER CHRIS.CARTER1900E@YAHOO.COM	New Hire Number HMSZK-H7AD			Status Active 🗹	
Onboarding Information Notification History Data Transmission History					🖨 History
Summary		Contact Informatio	Π		
Name	Chris Carter	Supervisor/Manager	Damon Car	ter	~
Pay Plan-Series-Grade	GS- 0343- 12	Onboarding Process Owner	Dana Robin	ison	~
PCS Eligible		HR Contacts	Robyn Ba	achmann	
Position Title	Program Analyst				
Office	ASMB User Publications	Benefit Contacts	× Lori Davi	s	
Customer	ASMB User Publications				
Creation Date	8/27/2019	Payroll Contacts	× Corey Hu	ırst	
Start Date	Not Set <table-cell></table-cell>				
Request Number	20190827-20993				
Assignments					
Tasks	Forms		Documents		
Incomplete New Hire Tasks 4	Incomplete Forms	2	Application Documents		0
Completed New Hire Tasks 0	Completed Forms	0	Onboarding Documents		0
Incomplete Agency Tasks 5					
Completed Agency Tasks 0					
					Save

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.

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NEW HIRE: CHRIS CARTER 🗸						× ?
Overview Section Assignments Grad Questionnaires						
CHRIS CARTER CHRIS.CARTER1900E@YAHOO.COM	New Hire Number HMSZK-H7AD				Status Acti	ve 🗹 🛣
Manage Tasks Documents Forms					Notes	0 🖨 History
Tasks 5					Assign Workflo	w Add Task
All Statuses						
Task Name	÷	Owner	÷	Status \$	Due *	Completed Date 🗧 🗧
Receive Tentative Offer Response		Dana Robinson		Pending	08/27/2019	
Schedule Drug Test		Dana Robinson		Pending	08/27/2019	
Verify the New Hire Arrived for their First Day of Duty		Dana Robinson		Pending	08/27/2019	
Send Tentative Offer		Dana Robinson		Active	08/29/2019	
Request Licenses		Dana Robinson		Pending	08/31/2019	
						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.

USA Staffing® 🛛 🖷	Staffing Classification Recruit Admin Reports Search Go To	🔍 🖾 👤 Dana Robinson (STG) - ALL 🗸
NEW HIRE: CHRIS CARTER	Add Tasks	≥ 0
🕮 Overview 🖪 Assignments	Search Tasks	î la
CHRIS CARTER ASMB	Task Name	Status
CHRIS.CARTER1900E@YAHOO.COM	Adjudicate Childcare Background Checks	Active 🗹 🔛
Manage Tasks Documents Forms Tasks 5	Assign Pre-Employment Forms (HR Checklist)	Notes Notes History Assign Workflow Add Task
All Statuses	Benefits - Internal checklist	
Task Name	Confirm Physical Exam Completion	Due
Receive Tentative Offer Response	Establish Projected Entry on Duty Date	08/27/2019
Schedule Drug Test	HR Checklist - Ensure onboarding process is complete	08/27/2019
Verify the New Hire Arrived for their First D.	Initiate Background Investigation/Security Clearance	08/27/2019
	Initiate Childcare Background Checks	
Send Tentative Offer	Initiate e-Verify	08/29/2019
Request Licenses	Initiate Physical Exam	08/31/2019
	Initiate Suitability Review	
	Add Task Cancel	
	Add Task Cancel	Save

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.

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NEW HIRE: CHRIS CARTER 🗸					× ?
Overview Assignments D Questionnaires					
CHRIS CARTER CHRIS.CARTER1900E@YAHOO.COM	New Hire Number HMSZK-H7AD			Status Act	ive 🖻 🛣
Manage Tasks Documents Forms				Notes	0 🖶 History
Tasks 2				Assign Workfl	ow Add Task
All Statuses New Hire					
Task Name	\$ Owner	÷	Status	≑ Due -	Completed Date \$
Complete New Hire Questionnaire	New Hire		Active		
Schedule Fingerprint appointment	New Hire		Pending	08/27/2019	
					Save

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).

USA Staffing® 🛛 🖷					Go To	Q	🖾 💄 Dana R		
NEW HIRE: CHRIS CARTER									
Overview Assignments									
CHRIS CARTER CHRIS.CARTER1900E@YAHOO.COM	Jser Publicatio	New Hire Numb			_		Status Active 🗳	Ŕ	
Manage Tasks Documents Forms	Assign Work	lows			8		Notes 0	History	
Tasks 2	Workflow Nat	10				As	sign Workflow	Add Task	
All Statuses New Hire	Background	nvestigation Requirements							
Task Name	Benefits For	15				Due	* Comp	leted Date 🔅	•
Complete New Hire Questionnaire	✓ Employment	Forms							
Schedule Fingerprint appointment	Payroll forms					08/27/2019			
	Pre-Employn	ent							
	Processing F	rms							
	Pre-Employn	ent for Onboarding							
	Stage OPM 8) day							
	Vetting work	flow							
			Assign Workfl	ows	Cancel			Save	

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**.

NEW HIRE: CHRIS CARTER Overview Assignments Customer ASMB User Publications New Hire Manage Iasks Documents Forms Manage Iasks Documents Forms Add Iask All Statuses New Hire Complete New Hire Questionnaire New Hire Active 08:30/2019
CHRIS CARTER CARTER 1900E@YAHOO.COM Customer ASMB User Publications Manage Tasks Documents Forms New Hire Add Task Add T
CHRIS CARTER CHRIS CARTER CHRIS CARTER Manage Tasks Documents Forms Image Tasks Forms ASMB User Publications HMSZK-H7AD Image Tasks Documents Forms Image Tasks Image Tasks
Tasks S Assign Workflow Add Task All Statuses New Hire Task Name Owner Status Due Complete New Hire Questionnaire New Hire Add Task New Hire Questionnaire New Hire Active Determine Determine Complete New Hire Questionnaire New Hire Active Determine Determine Complete New Hire Questionnaire New Hire Active Determine Determine Determine
All Statuses New Hire Task Name Owner Status Due Complete Date Complete New Hire Questionnaire New Hire Active 08/30/2019
Complete New Hire Questionnaire New Hire Active 08/30/2019
OF-306 Review, Sign, and Submit Form New Hire Active 08/30/2019
Schedule Fingerprint appointment New Hire Pending 08/30/2019
I-9 - Review, Sign, and Submit Form New Hire Pending 09/03/2019
SF-61 - Review, Sign and Submit form New Hire Pending 09/13/2019
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.

USA Staffing A <u>Staffing</u> Classification	Recruit Admin	Reports Search	Go To C	📃 🛛 🔍 Dana Robinson (STG) - ALL 🗸
NEW HIRE: CHRIS CARTER 🗸				🛎 😗
Overview Assignments I Questionnaires				
CHRIS CARTER CHRIS.CARTER1900E@YAHOO.COM	New Hire Number HMSZK-H7AD			Active 🖻
Manage Tasks Documents Forms				🗨 Notes 🔘 🖨 History
Tasks 5				Assign Workflow Add Task
All Statuses				
Task Name \$	Owner	\$ Status	Due	Completed Date
Complete New Hire Questionnaire	New Hire	Active	08/30/2019	
OF-306 Review, Sign, and Submit Form	New Hire	Active	08/30/2019	
Schedule Fingerprint appointment	New Hire	Pending	08/30/2019	
I-9 - Review, Sign, and Submit Form	New Hire	Pending	09/03/2019	
SF-61 - Review, Sign and Submit form	New Hire	Pending	09/13/2019	
				Save

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).

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NE	Notification Temp	olates (6)									
0	All Types 🔻								Template Name or Template Description	Q,	
C	Template Name	Туре	٥	Template Description						٠	
CH	Fingerprint appointment	Custom		Required for smart card							
T	Invitation Template	Invitation		Invitation Notificaiton for Vetting							Π.
T	Official Offer Letter	Official Offer		Official Offer - Welcome Letter							
	Orientation	Custom		First day of work							•
C	Seasonal Recruitment Tentative Offer	Tentative Offer		Tenative Letter for Seasonal Recrui	ts						
c	Tentative Offer Template	Tentative Offer		Tentative Offer - All Positions							
Ċ											•
										Save	

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.

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NE		tification Templates		
	All Ty		Template Name or Template Desc	ription Q,
	Templa	Preview Notificatio	D	0
C CH	Finge		"	- K
м		То	Chris.Carter1900e@yahoo.com	·
-		cc		
	Offici	Reply To	DANA ROBINSON@OPM.GOV	
	Orien	Subject	Tentative Job Offer	- 68
-	Seaso			
C	Tenta		Helio Chris!	î
	Tenta		Congratulations on this tentative offer! You have been selected for the Program Analyst position.	
			This offer is contingent upon your ability to successfully pass a background investigation. You are required by law and regulation to have a background investigation conducted to determine your suitability for Federal employment and for national security purposes, if required by the position. This must be initiated prior to receiving an official offer of employment.	
			Your actual entrance-on-duty date will be established after a pre-employment check is completed which will assign you an identity credential and will establish your initial level to Government facilities and information systems. Your full suitability/security clearance investigation, as applicable, may be completed after your entrance-on-duty date. Note, you will be submitting all suitability/security clearance forms through the separate e-QIP system.	100
			This notification also serves as your invitation to the USA Staffing entrance-on-duty system and the initiation of the pre-employment screening process. You will utilize your USAJOBS account information to login to the system.	
-			You will complete all forms required for the onboarding process within this system. Once logged in, you will be asked a series of questions and your answers will be used to automatically populate the required forms. All forms assigned to you must be completed, signed and submitted back to the Human Resources Office within the system.	
		Previewing	notification for New Hire Carter, Chris Add Attachment	
			Edit Notification Send Notification	Save

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

15. 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.

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NEW HIRE: CHRIS CARTER → 🛎 •									
Overview Assist	ynments 🕑 Que	estionnaires							
CHRIS CARTER CHRIS.CARTER1900E@YAHOD.COM	ASMB Use	r Publications	New Hire Number HMSZK-H7AD		status Active I	2 🛣			
Onboarding Information Notific	ation History Data 1	ransmission History				🖶 History			
Notifications 1									
Template Name	Template Type	Date Sent	Sender	Recipients	Email Subject	View Content			
Tentative Offer Template	Tentative Offer	8/29/2019 7:29:02 AM	Dana Robinson	Chris.Carter1900e@yahoo.cor	n Tentative Job Offer	HTML PDF			

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

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

To:	Chris.Carter1900e@yahoo.com
CC:	
From:	usastaffingoffice@opm.gov (on behalf of Dana Robinson)
Sent:	8/29/2019 4:29 EDT
Subject:	Tentative Job Offer
Hello Chris!	
Congratulat	ions on this tentative offer! You have been selected for the Program Analyst position.
a backgroun	contingent upon your ability to successfully pass a background investigation. You are required by law and regulation to have id investigation conducted to determine your suitability for Federal employment and for national security purposes, if the position. This must be initiated prior to receiving an official offer of employment.
credential a investigatio	entrance-on-duty date will be established after a pre-employment check is completed which will assign you an identity d will establish your initial level to Government facilities and information systems. Your full suitability/security clearance n, as applicable, may be completed after your entrance-on-duty date. Note, you will be submitting all suitability/security rms through the separate e-QIP system.
questions ar	plete all forms required for the onboarding process within this system. Once logged in, you will be asked a series of Ind your answers will be used to automatically populate the required forms. All forms assigned to you must be completed, submitted back to the Human Resources Office within the system.
	this link to respond to the tentative offer and to continue with accessing your onboard account: https:// ge.usastaffing.gov/?selectee=d3b0e5cd-ce6d-4c15-8899-019eacdfdba9&type=tentative
lf you have a	iny questions regarding your new position, please feel free to contact me.
Respectfully	
Dana Robins (202) 000-00	

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.

Notes for Nev	v Hire			