



Onboarding Manager

New System Features and Enhancements

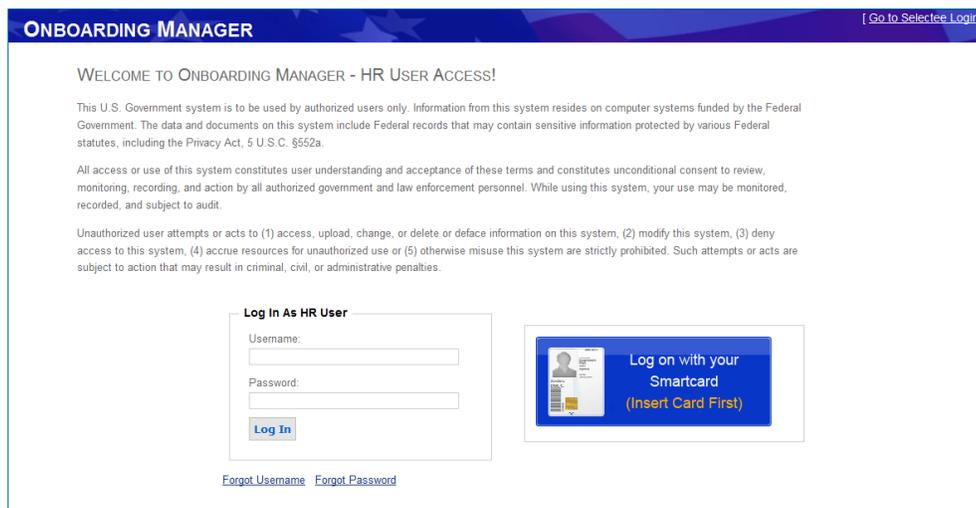
TABLE OF CONTENTS

HR User Interface.....	1
Smart Card Access.....	1
Notification Maintenance	2
TAGs	5
Selectee Data	5
Assignments	6
Reports.....	7
Login.....	8
System Corrections	8
Selectee Interface	8
My Data.....	8

HR USER INTERFACE

Smart Card Access

This release provides HR users an additional method to log into Onboarding Manager using a Smart Card such as a Personal Identification Verification (PIV) or Common Access Card (CAC). Users will be presented with the Smart Card login option on the Welcome page for HR User access. For additional information on the Smart Card login process, refer to the [USA Staffing® PIV Login Quick Start Guide](#).



Notification Maintenance

Notification Templates

Notification Maintenance is a new topic in the **Administration** work area. **Notification Maintenance > View Notifications** allows Organization and Office Administrators to view, create, edit, copy, and delete notification templates. This feature allows users to send customized correspondence to selectees, increasing communication options with the selectees throughout the onboarding process. Administrators can create organization or office level notifications.

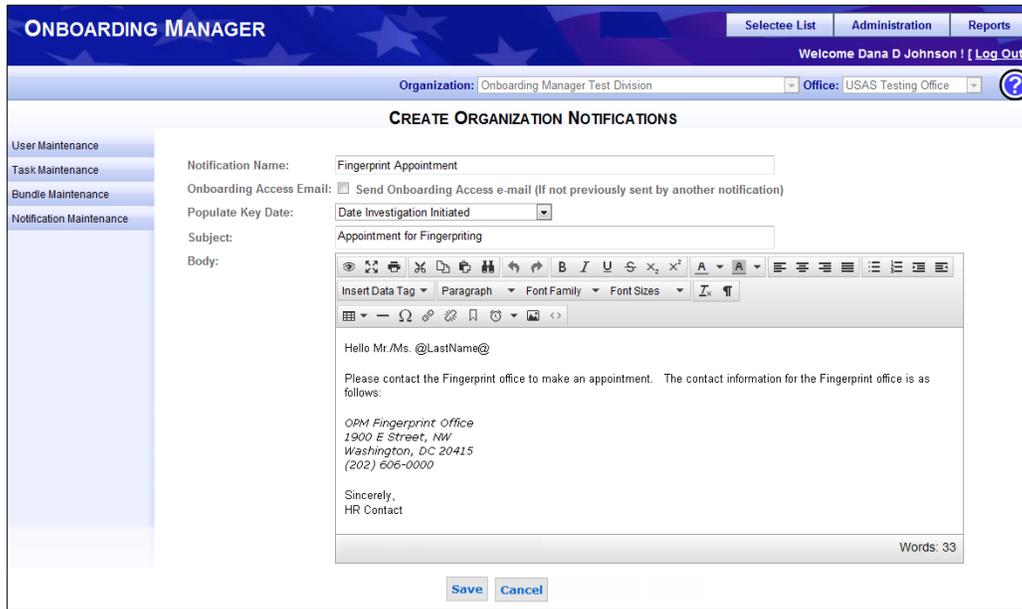
The screenshot shows the 'VIEW NOTIFICATION TEMPLATES' page in the ONBOARDING MANAGER application. The page header includes the application name, user name (Dana D Johnson), and organization (Onboarding Manager Test Division). The main content area contains a table of notification templates with the following data:

Notification Template Name	Level	Created By	Last Modified	Last Modified By
<input type="checkbox"/> Background Investigation	Office	Dana D Johnson	8/28/2013 1:49:06 PM	
<input type="checkbox"/> Fingerprint Appointment	Office	Dana D Johnson	8/24/2013 12:49:36 PM	
<input type="checkbox"/> New Invite	Organization	Levi Flory	8/28/2013 10:56:10 PM	

Organization and Office Administrators may also copy existing notification templates. Organization Administrators may copy organization and office level templates, and Organization Administrators are given the option to create the copied template at the organization or office level. Office Administrators may copy both organization and office level templates, but Office Administrators may only create the copied template at the office level.

After an Administrator clicks **Create Organization Notification** or **Create Office Notification**, an email template displays allowing the Administrator to customize the following fields:

- **Notification Name.** This is the name of the notification template.
- **Onboarding Access Email: Send Onboarding Access e-mail (If not previously sent by another notification).** When this box is checked, the notification will trigger an email to the selectee containing a unique URL that allows the selectee to create his/her login credentials.
- **Populate Key Date.** Administrators can select a **Key Date** field that will populate with the date this notification is sent.
- **Subject.** The text in this field displays as the subject of the notification email.
- **Body.** This is the text of the email that provides the selectee with information, guidance, or instructions regarding this notification.

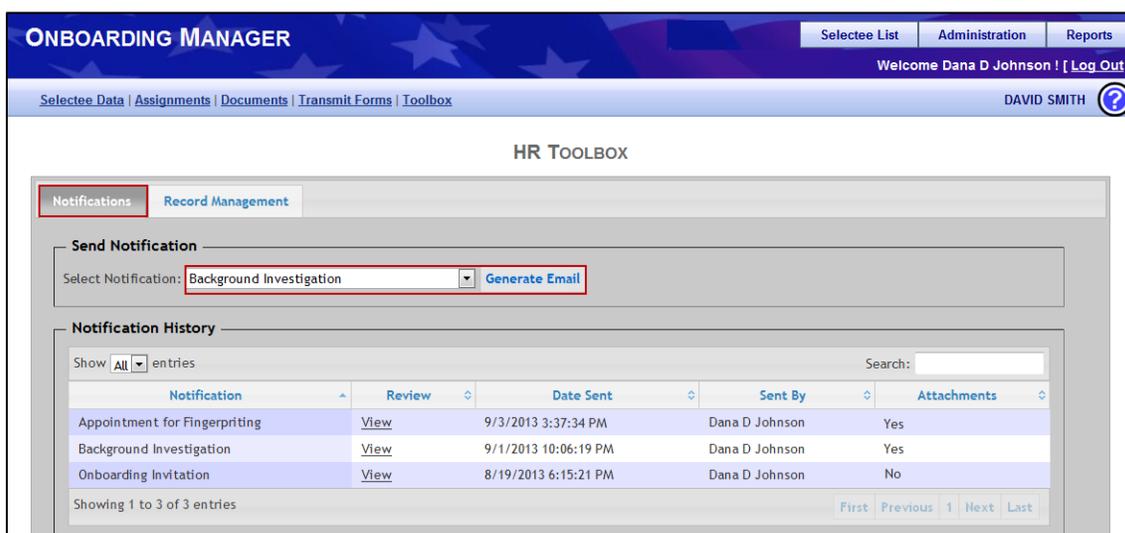


Once notifications templates are created in **Administration**, HR users can select a notification template to send to a selectee.

Manual Notification

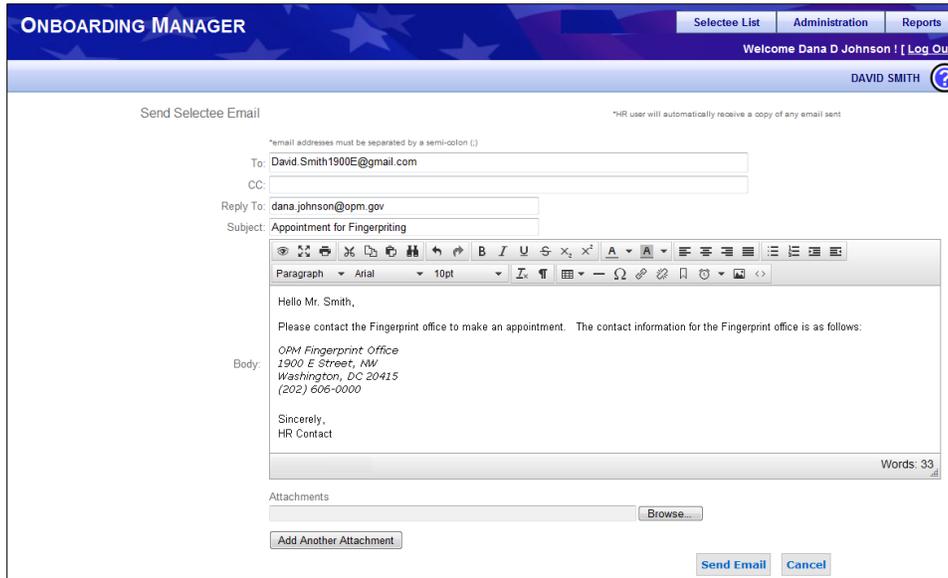
HR users are able to send notifications to selectees by selecting a customized notification template using the **Notifications** tab in the **Toolbox**.

Note: The **Invite** button has been removed from the **Toolbox** and the invitation action is now located within the **Notifications** tab. HR users will need to select the appropriate invitation notification to invite selectees to Onboarding Manager.



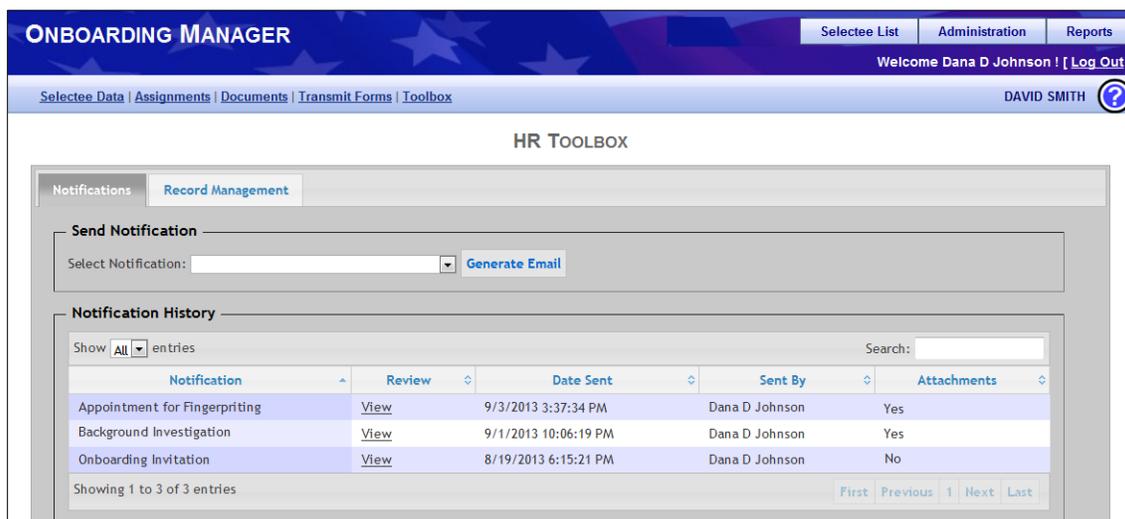
Notification email

After HR users select the appropriate notification template, a pre-populated email form will display with the notification information. Users may edit the template information (if necessary) and attach documents before sending the notification to the selectee. In addition, a rich text toolbar has been added to the **Body** section of the email template for advanced formatting options including the ability to use hyperlinks.



Notification History

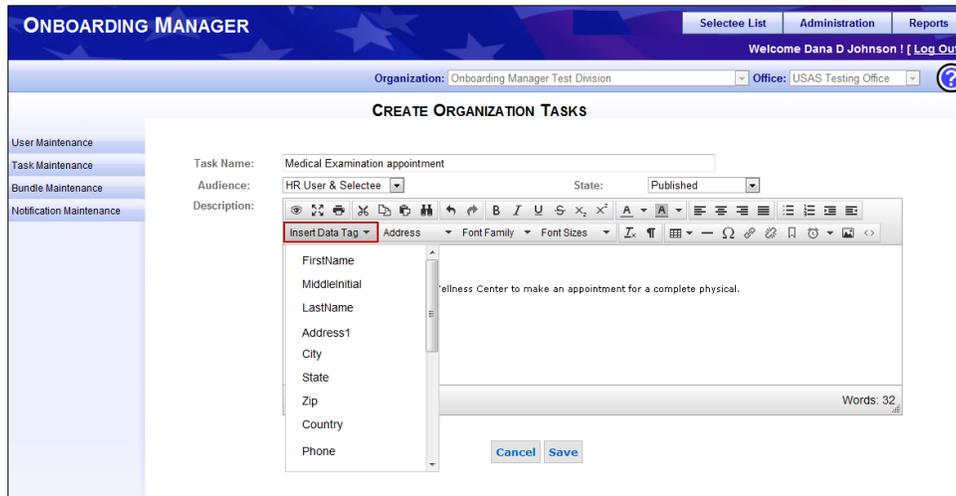
The **Notifications** tab also includes a **Notification History** table that displays all notification correspondence that has been sent to a selectee. Users can click **View** next to the **Notification** name to review the content of the notification message sent.



TAGs

Notification Template and Task Maintenance

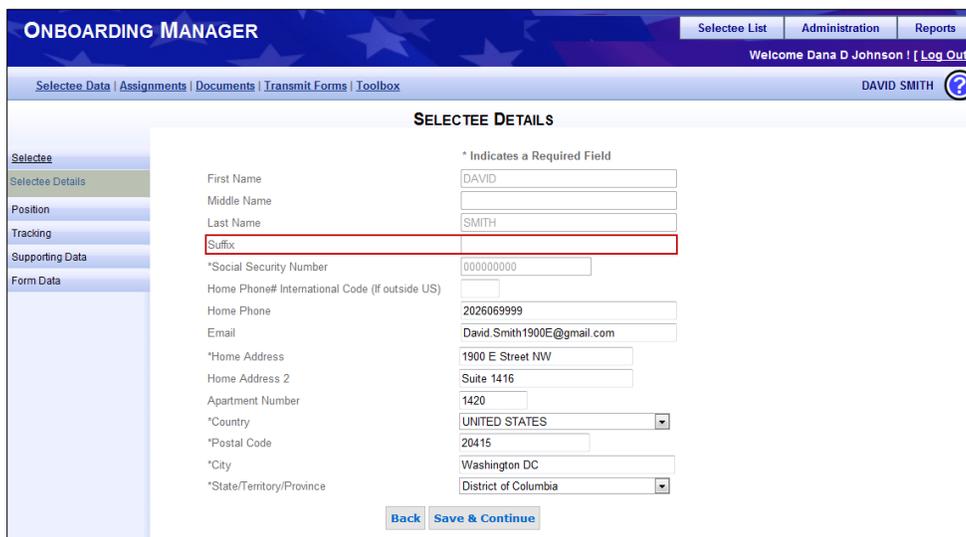
Organization and Office Administrators can use TAGs when creating and/or editing notification templates and TAGs can also be applied to organization and office level tasks. A TAG will automatically insert static information indicated by the TAG anywhere within the **Body** of the notification or the **Description** field of a task based on the position of the cursor. The options in the Insert Data TAG drop-down list include data such as: selectee biographic information, position & agency information, HR Contact information, Key Dates, etc.



Selectee Data

Selectee Details

The Selectee Details page now includes a **Suffix** field. This field allows the system to capture the selectee's full name. The **Suffix** field has a limit of four characters and only alpha characters and periods are accepted.



Assignments

Action to Take

The Assignments page includes an additional column titled **Action to Take**. This column informs the HR user if form information still needs to be completed by the HR user before opening the PDF version of the form. The **Action to Take** column will display one of the following values:

- **Complete Selectee Data.** The HR user needs to complete information on the form before signing and/or accepting the form.
- **Review and Accept Form.** This indicates that all form information is complete and the HR user may proceed with signing and/or accepting the form.
- **Blank.** When the **Action to Take** is blank, there is no further action required by the HR user.

The screenshot displays the 'ONBOARDING MANAGER' interface. At the top, there are navigation tabs for 'Selectee List', 'Administration', and 'Reports'. Below this, a welcome message reads 'Welcome Dana D Johnson! [Log Out]'. The main content area is titled 'CURRENT ASSIGNMENTS' and includes a search bar and an 'Assign' button. A table of assignments is shown below, with columns for 'Form Name', 'Form Status', 'Due Date', 'Review', and 'Action To Take'. The 'Action To Take' column is highlighted in red for the first two rows, showing 'Complete Selectee Data' and 'Review' respectively. The third row shows 'Review & Accept' and 'Review and Accept Form'. The table also includes a search bar and pagination controls at the bottom.

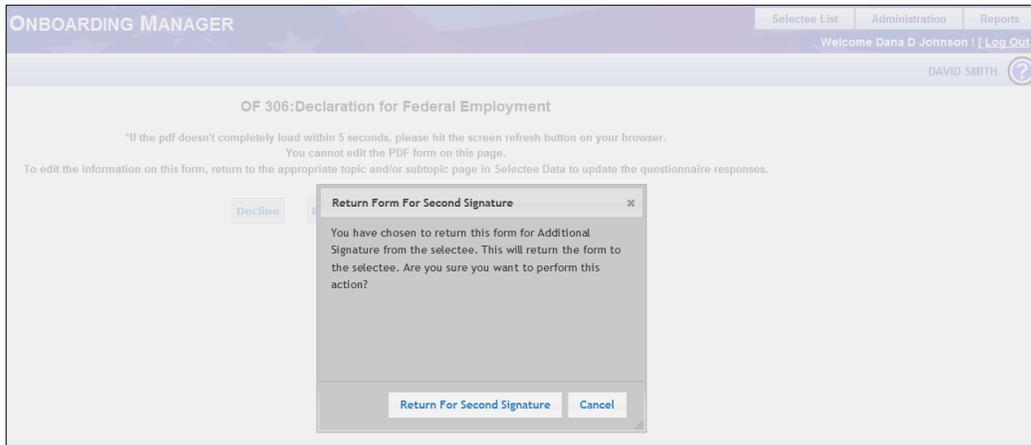
Form Name	Form Status	Due Date	Review	Action To Take
I 9 Employment Eligibility Verification - New	Submitted	9/3/2013	Review	Complete Selectee Data
SF 3102 Designation of Beneficiary (FERS)	Ready To Submit	8/30/2013	Review	Review
W 4 Employee Withholding Allowance	Submitted		Review & Accept	Review and Accept Form

Due Date no longer required for forms

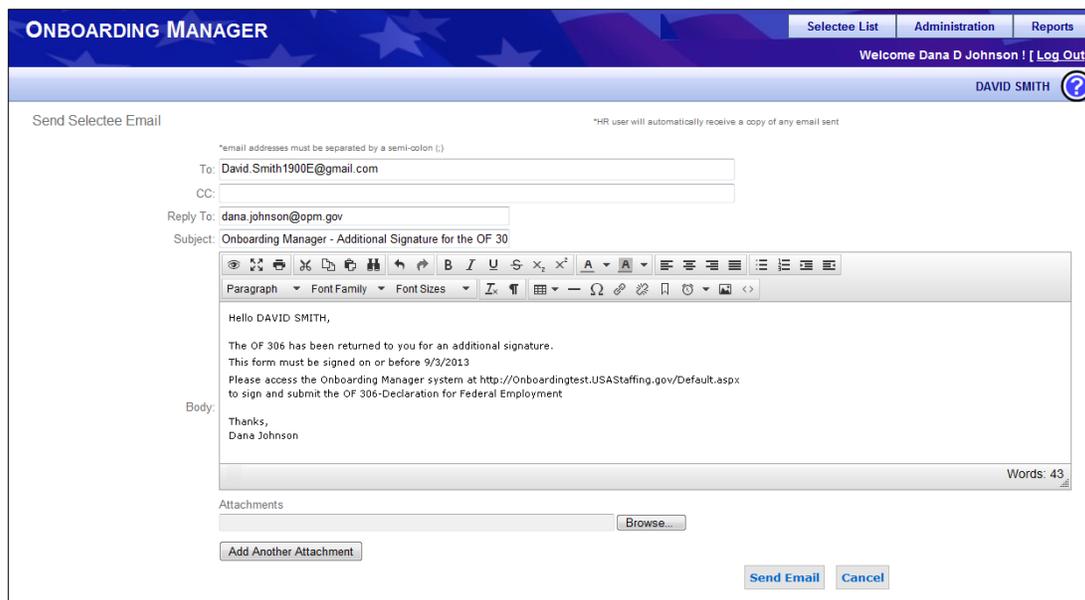
The Assignments page has also been updated to eliminate the requirement for HR users to enter a due date for assigned forms. This modification will reduce selectee confusion when a due date is displayed but the form cannot be submitted until the start date.

Email Reminder for forms with additional signatures

Forms that require additional signatures from the selectee (e.g. OF-306) now allow the HR user to send an alert email to the selectee when the form is returned for the second signature. After the HR user reviews the form and clicks **Return for Additional Signature**, a warning message will display providing options to the HR user to continue with returning the form or cancel the action.



If the HR user proceeds with returning the form, an email form will display after the first time the HR user accepts the form. This email serves to remind the selectee that the form needs to be returned with the additional signature on or before the effective date of the appointment to ensure the form is properly completed. The HR user also has the option to cancel the email form and the message will not be sent to the selectee.



Reports

The column headings on the eOPF Transmission Report have been updated to include documents (in addition to forms) that have been transmitted to the eOPF system.

The **Start Date** and **End Date** criteria for the Form Status Report and Task Status report will now generate based on the Actual EOD Date instead of the Record Creation Date.

Login

USA Staffing systems, including Onboarding Manager, require HR users to change their passwords every 90 days. When HR users log in with a valid username and password but the password has expired, the system will display the following warning message: *"Your password has expired. Please select Forgot Password to change your password."*

System Corrections

SELECTEE INTERFACE

My Data

Beneficiary share percentage fields

The ***Beneficiary Share*** field(s) that displays the share to be paid to each beneficiary no longer accepts alpha characters or special characters (e.g. the % symbol). These fields are restricted to numeric characters to avoid HR users from receiving the generic error on the HR User interface when accessing the Assignments page.