

New Hire Training Exercise 1: Creating a New Hire Record from a Certificate

Now that you have completed the online portion of training for New Hire, it is time to log into the Training 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 auditing a selection from a certificate to create a new hire record (if you do not have access to audit certificates, start with Exercise 2). Creating a new hire record from a certificate requires you to access a certificate that is ready to be audited. If you have a certificate that is ready, complete the steps below. If not, you can 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. You will then need to complete the Request, Vacancy, Assessment, Announcement and Referral exercises before proceeding with this exercise.

My Request Number: _____

My Vacancy Number: _____

My Certificate Number: _____

Before you begin this exercise:

- Your Office Administrator will need to create onboarding tasks & workflows that you can assign to the new hire record.
 - Your Office Administrator will need to create a Tentative Job Offer notification template that you can send to the new hire.
 - Be sure you have access to the e-mail account for the new hire selected from the certificate.
1. Go into your vacancy. There are several ways to access a vacancy:
 - a. If you know the **Vacancy Number**, you can type it directly in the **Go To** box at the top of the page and select **Enter**.
 - b. You can locate your request in the Requests tab of your dashboard. Once in your request, there is a direct access link under the **Vacancy Created** section. (This is the option shown below.)
 - c. If you have recently gone into this **Vacancy Number**, it will show up in your dashboard dropdown list.
 2. Once in your Vacancy, navigate to the **Certificates** tab and select the **Certificate Number**.

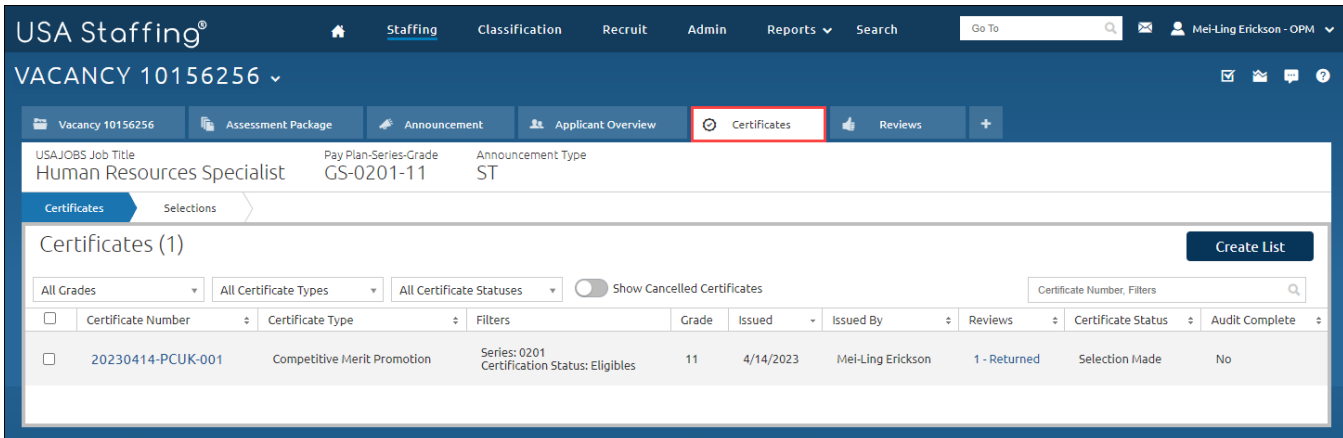


Image 1: Vacancy page with the Certificates tab highlighted.

- Once the certificate is open, select the **Edit** icon next to the selected applicant's name to audit the applicant record.

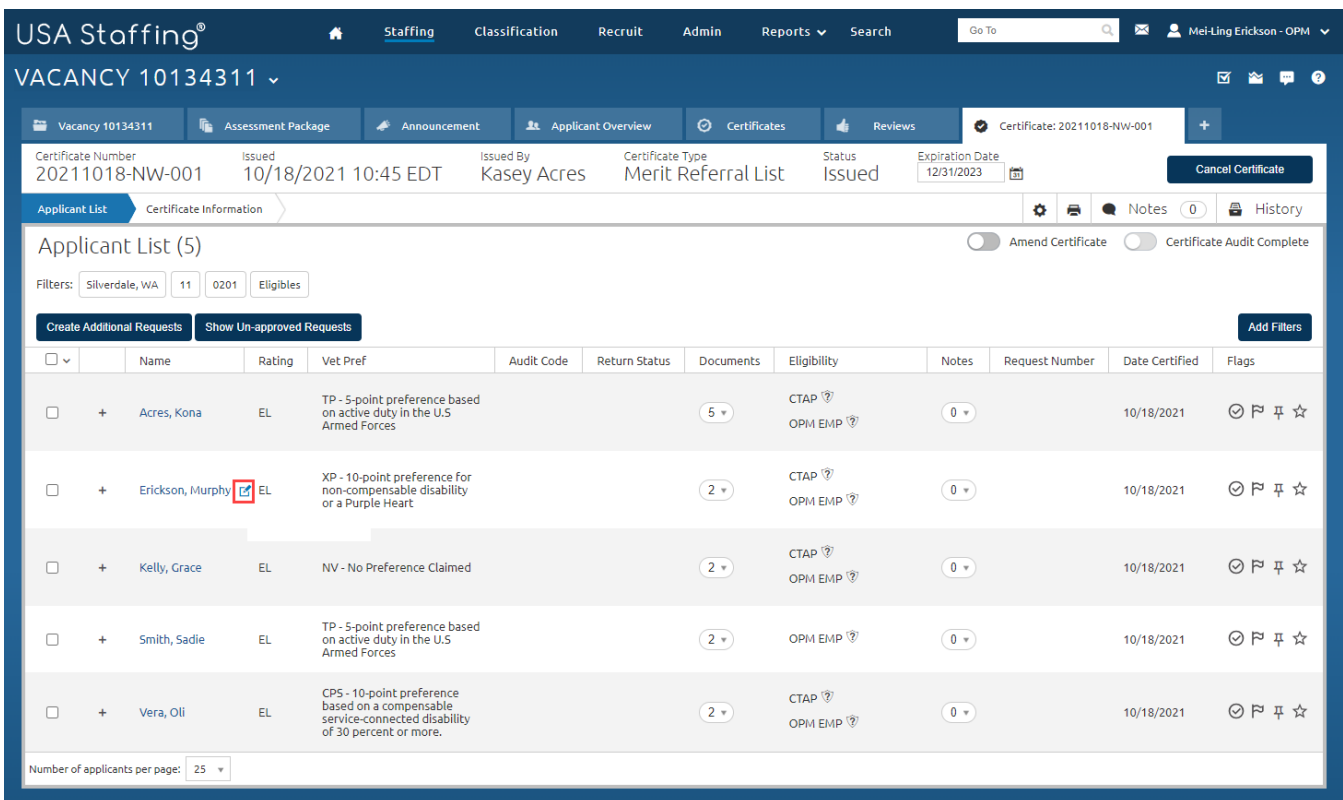


Image 2: Certificate page with the Applicant List displaying.

- On the Audit Application page, choose **Selected** for the Audit Code, select **Hired** for the Return Status, then select the Customer and Request Number as well as the Location, Workflow, Position Description Number and Series (if these fields are not populated) and select **Save and Close**.

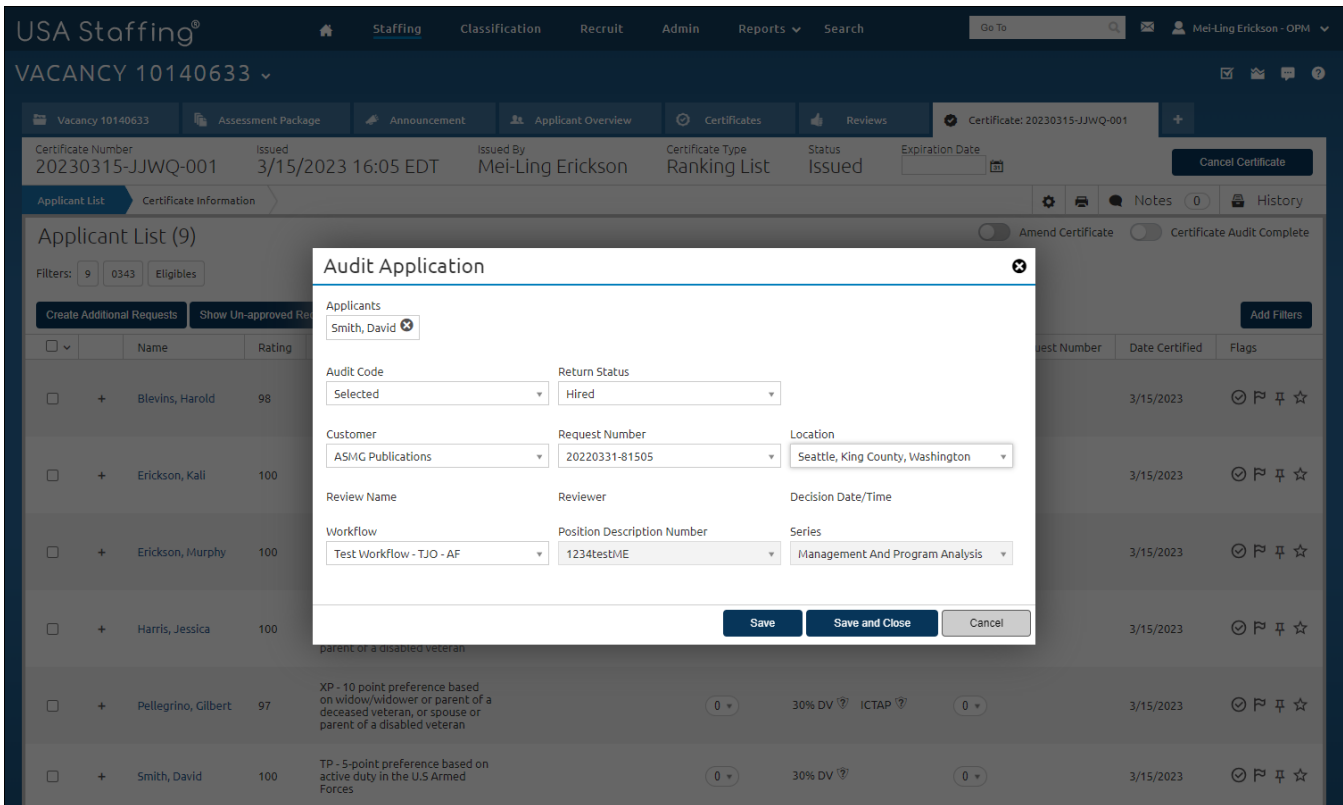


Image 3: Applicant List page with the Audit Application pop-up open.

- After selecting **Save and Close**, the Save Audit Create New Hire Process page will display to indicate the new hire record is being created. After this process completes, you will be returned to the certificate.

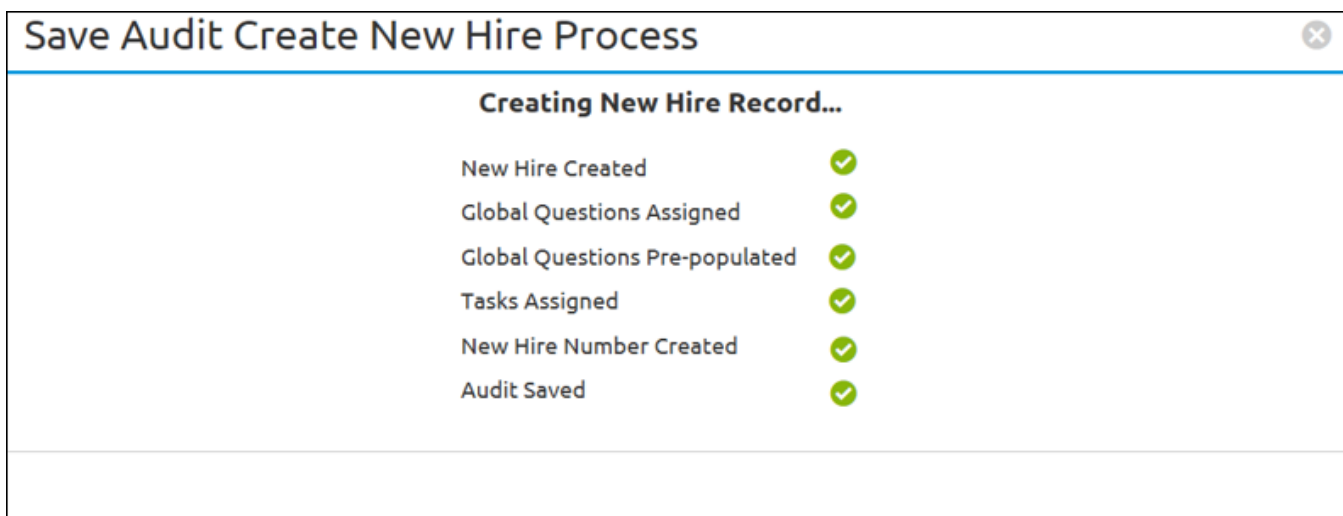


Image 4: The Save Audit Create New Hire Process page.

- Expand the view for the selected applicant on the certificate and select **Onboarding**. Select the **View New Hire** record button to be directed to the new hire record.

The screenshot displays the USA Staffing application interface. At the top, the navigation bar includes 'USA Staffing', 'Staffing', 'Classification', 'Recruit', 'Admin', 'Reports', and 'Search'. The main header shows 'VACANCY 10140633' and 'Certificate: 20230315-JJWQ-001'. Below this, the 'Certificate Information' tab is active, showing details for Certificate Number 20230315-JJWQ-001, issued on 3/15/2023 at 16:05 EDT by Mei-Ling Erickson. The Certificate Type is 'Ranking List' and the Status is 'Selection Made'. The 'Applicant List (9)' is displayed, with filters for '9' and '0343' 'Eligibles'. The selected applicant record for David Smith is expanded, showing a table of tasks for onboarding.

Rating	Assessment	Eligibility	Onboarding
98	CP -10-point preference based on a compensable service-connected disability of 10 percent or more, but less than 30 percent	30% DV	0
100	CP -10-point preference based on a compensable service-connected disability of 10 percent or more, but less than 30 percent	30% DV	3
100	TP - 5-point preference based on active duty in the U.S Armed Forces	30% DV	0

Task Name	Owner	Status	Due	Completed Date
Complete Human Resources Questionnaire	Mei-Ling Erickson	Active		
OF-306 HR Review, Approve and Sign	Mei-Ling Erickson	Active	09/27/2023	
Send Tentative Offer	Mei-Ling Erickson	Pending	09/29/2023	
Verify the New Hire Arrived for their First Day of Duty	Mei-Ling Erickson	Active	10/05/2023	

Image 5: Certificate tab with the Applicant List page open with an expanded view of the selected applicant record.

- After selecting 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 to assign staff as the Onboarding Process Owner, HR Contacts, Benefits Contacts, and Payroll Contacts. Select **Save** to retain the updates. These are the users who will manage the record. Note: Depending on agency defaults the HR Contacts, Benefits Contacts, and Payroll Contacts may auto populate.

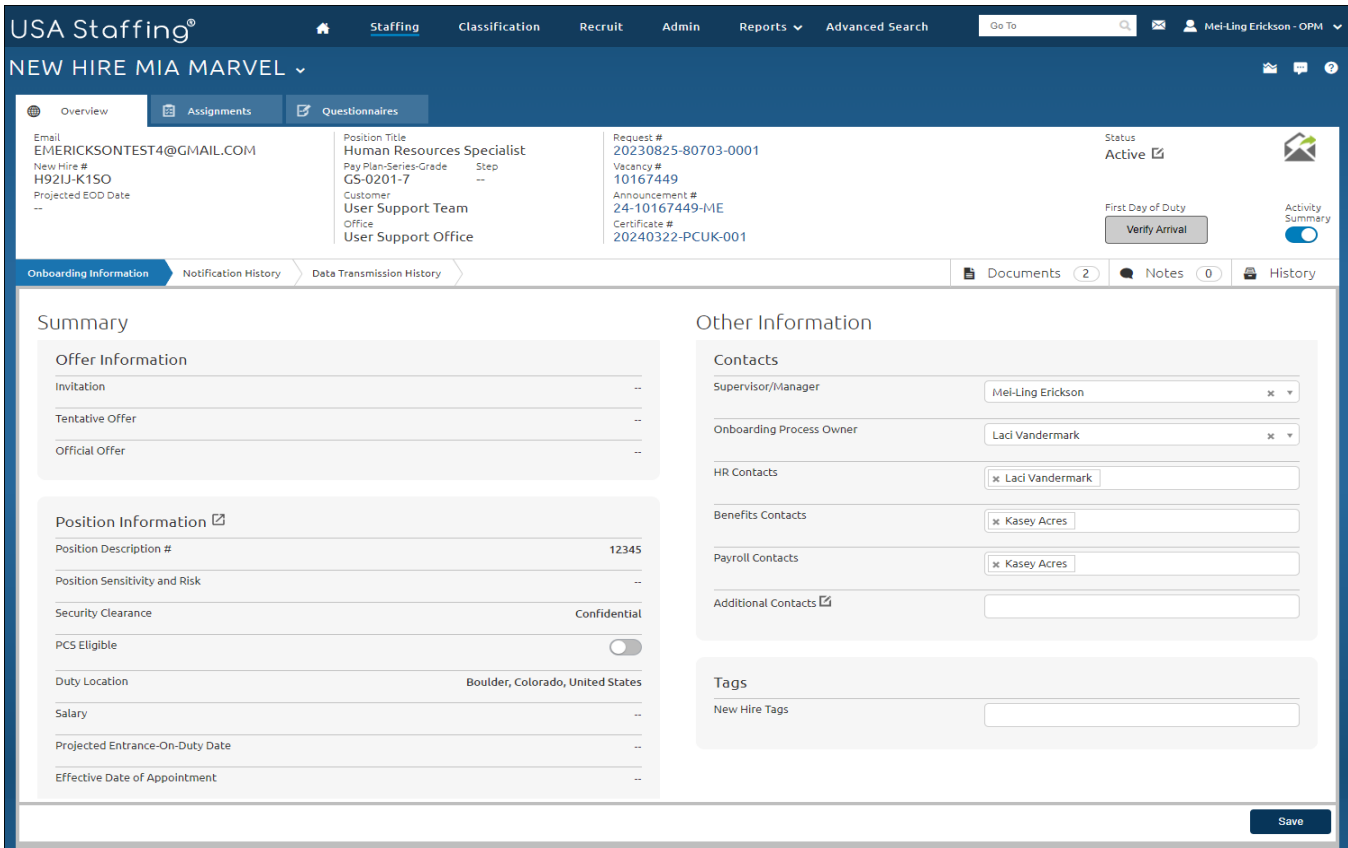


Image 6: Overview page displaying the Contact Information area to assign staff to the record.

- After assigning contacts to the record, go to the **Assignments** page where you can begin managing the HR owned tasks for the record.

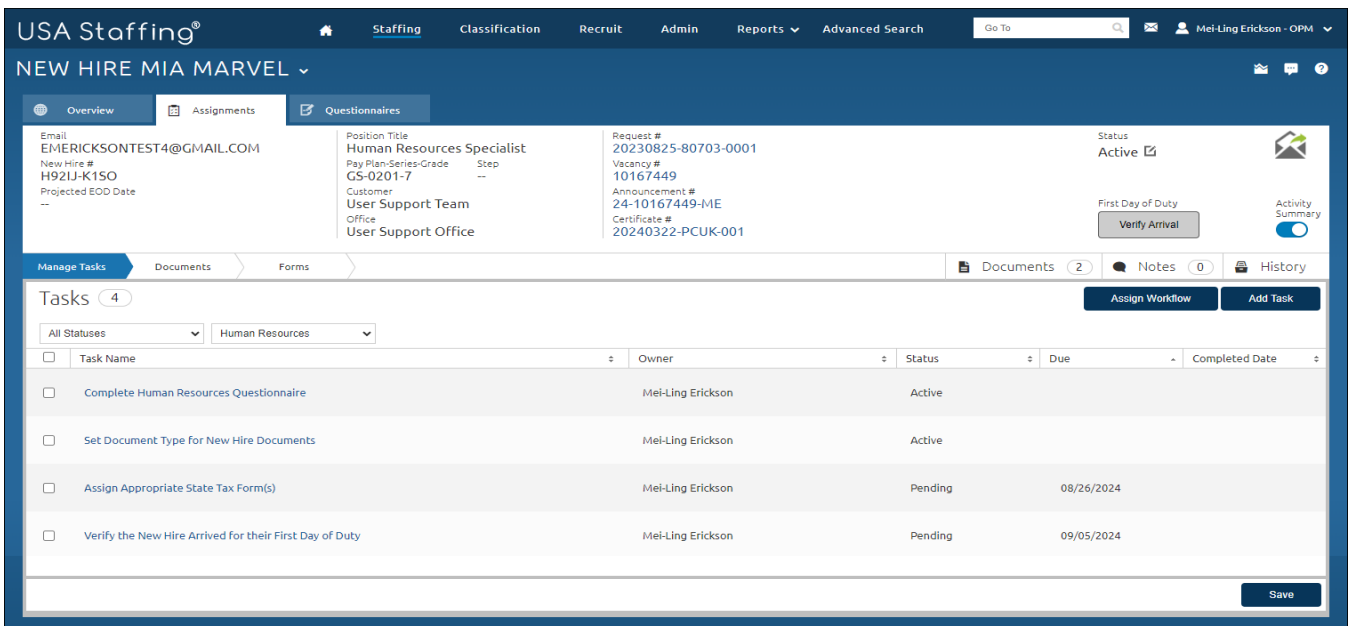


Image 7: A new hire's record is on the Assignments tab with the Manage Tasks page displaying.

- Filter the Manage Tasks page to display the **New Hire** tasks. Select 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 for reporting purposes.

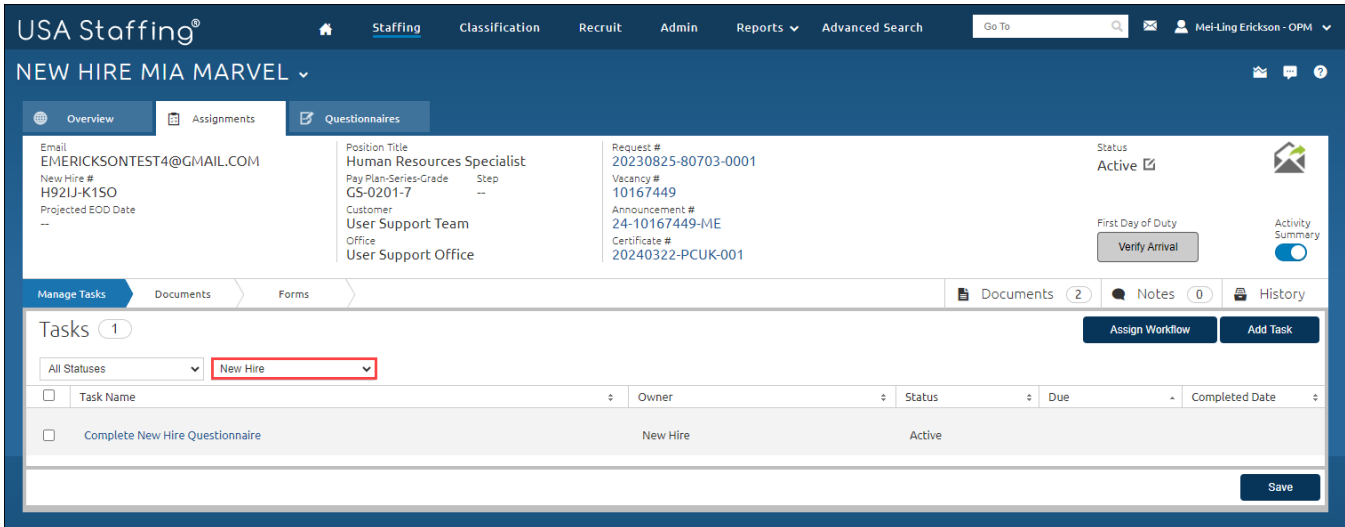


Image 8: A new hire's record under the Assignments tab with the Manage Tasks page filtered by the New Hire tasks.

- Select the appropriate workflow and select 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).

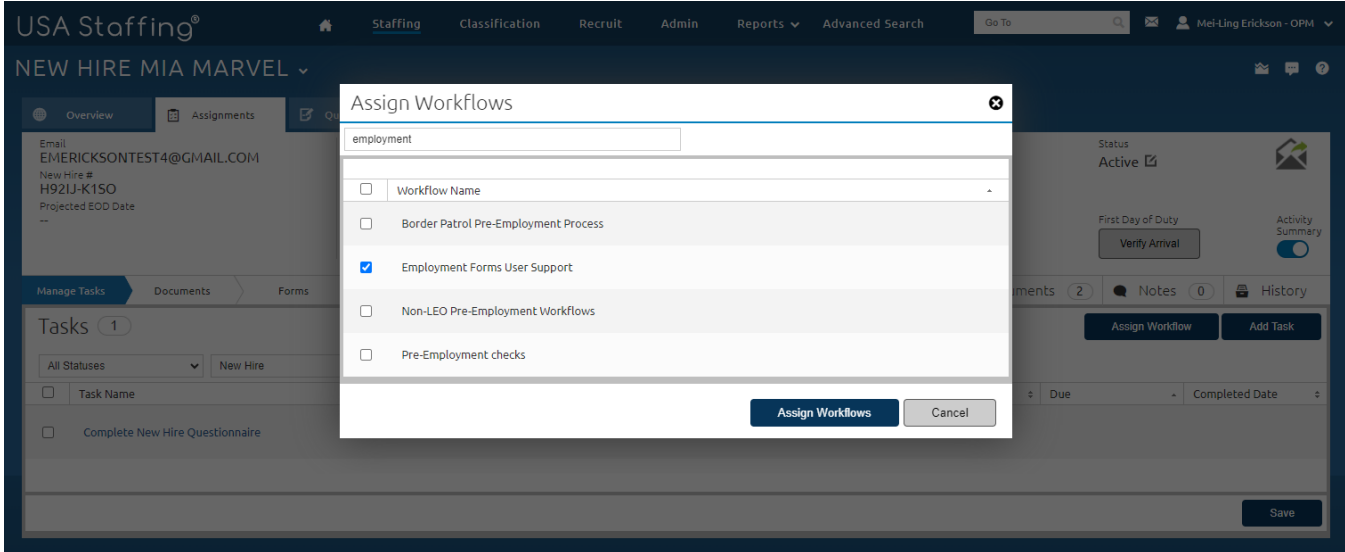


Image 9: A new hire's record is on the Manage Tasks page displaying the Assign Workflows pop-up.

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

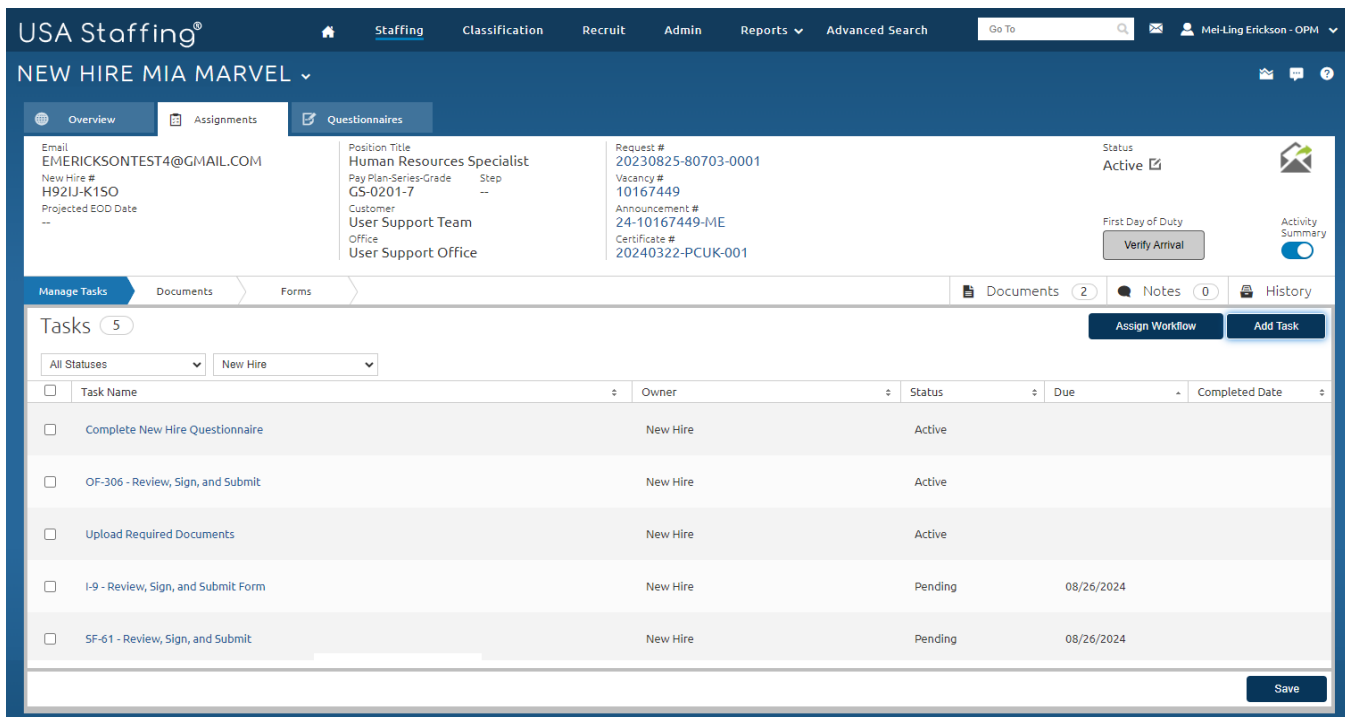


Image 10: A new hire's record is on the Manage Tasks page displaying the tasks assigned from the workflow.

12. Now you are ready to send the job offer to the new hire. Select the **Envelope** icon to initiate sending the job offer notification. In some cases, agencies will require certain data fields in the Questionnaire Tab to be completed prior sending offer letters to populate data inserts, please verify this information with your Office Administrator.

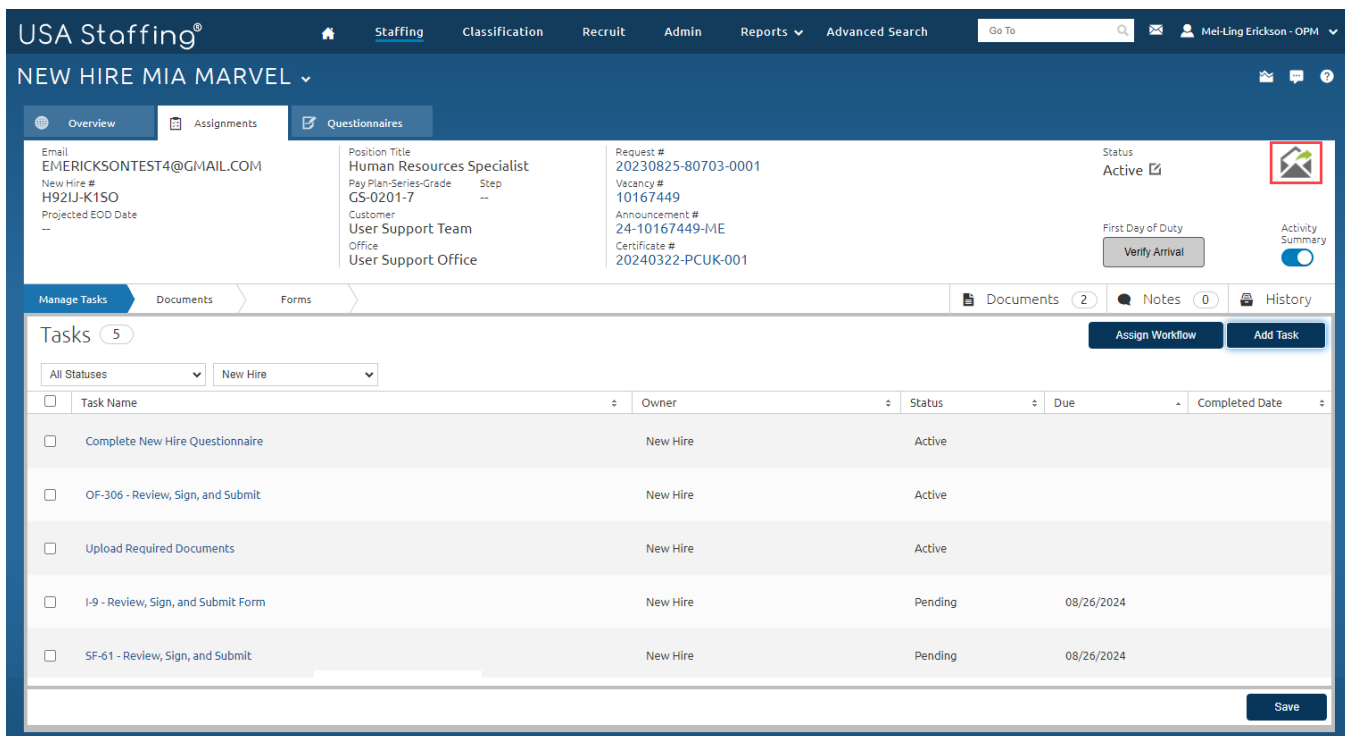


Image 11: A new hire's record is on the Manage Tasks page highlighting the Envelope icon.

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

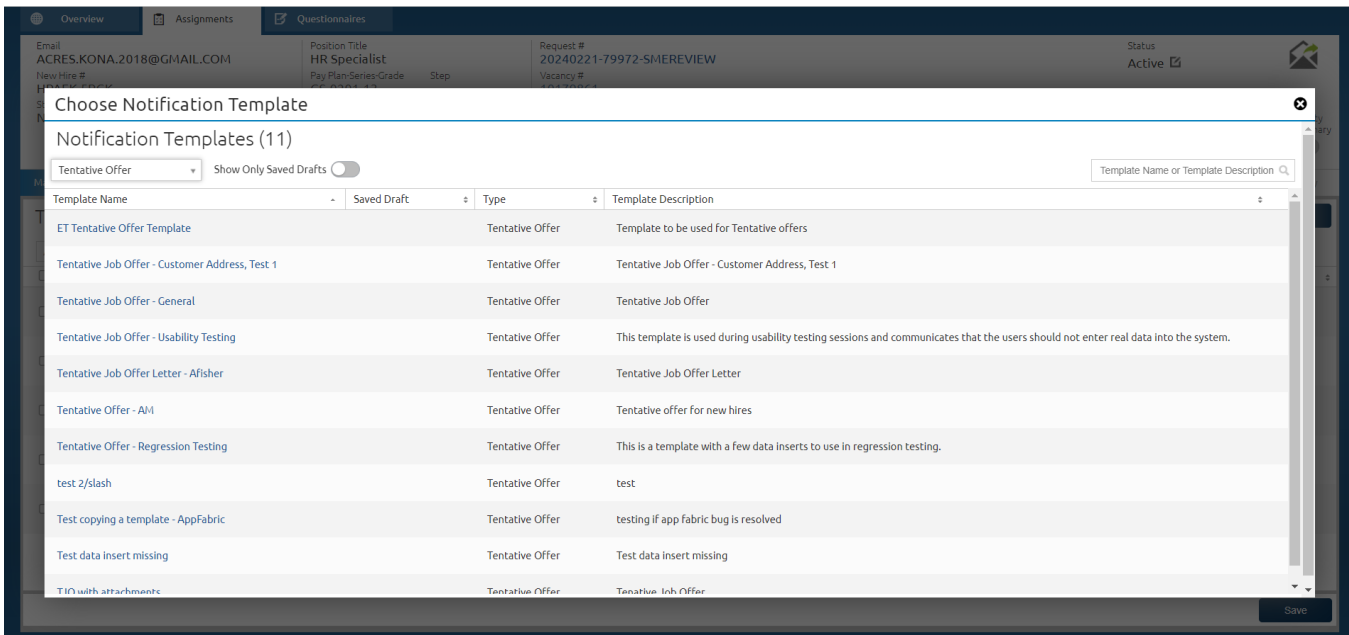


Image 12: Choose Notification Template page.

14. Select **Send Notification** from the Preview Notification page. You will need to update and remove any placeholder text before you're able to send the Notification.

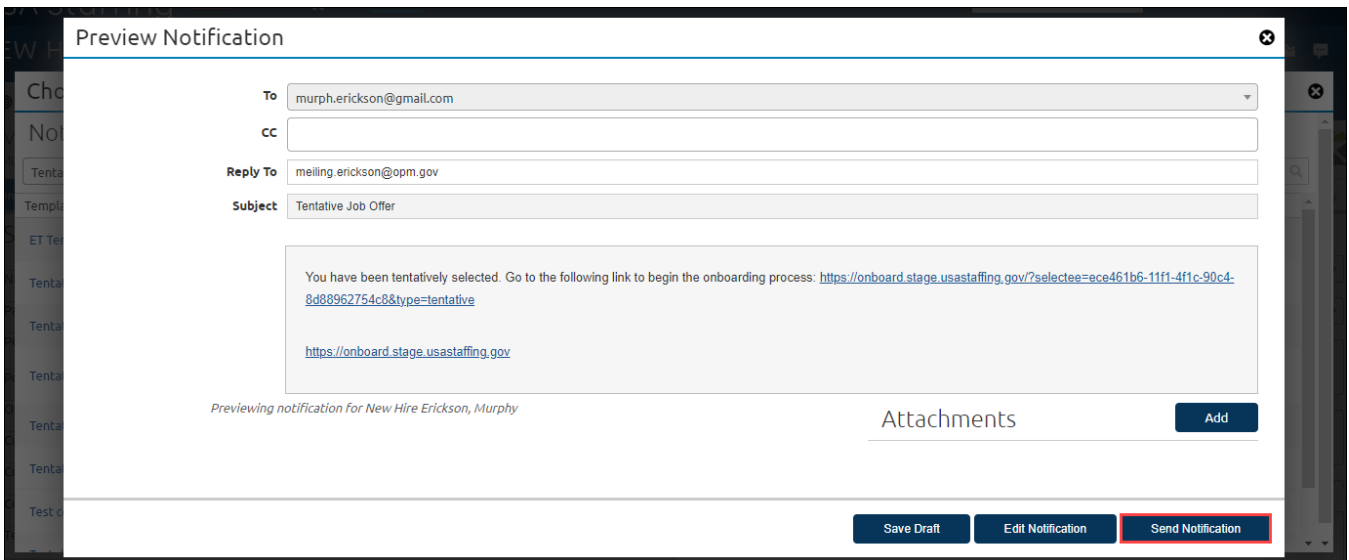


Image 13: The Preview Notification page for the Tentative Offer E-mail.

15. Now that you have a created a new hire record, assigned workflows and tasks, and sent the tentative offer to the new hire through the onboarding system, let's take a look at the online help.

16. Select the **Help** icon  and choose **Review Online Help** from the drop-down. The online help will open in a separate tab.

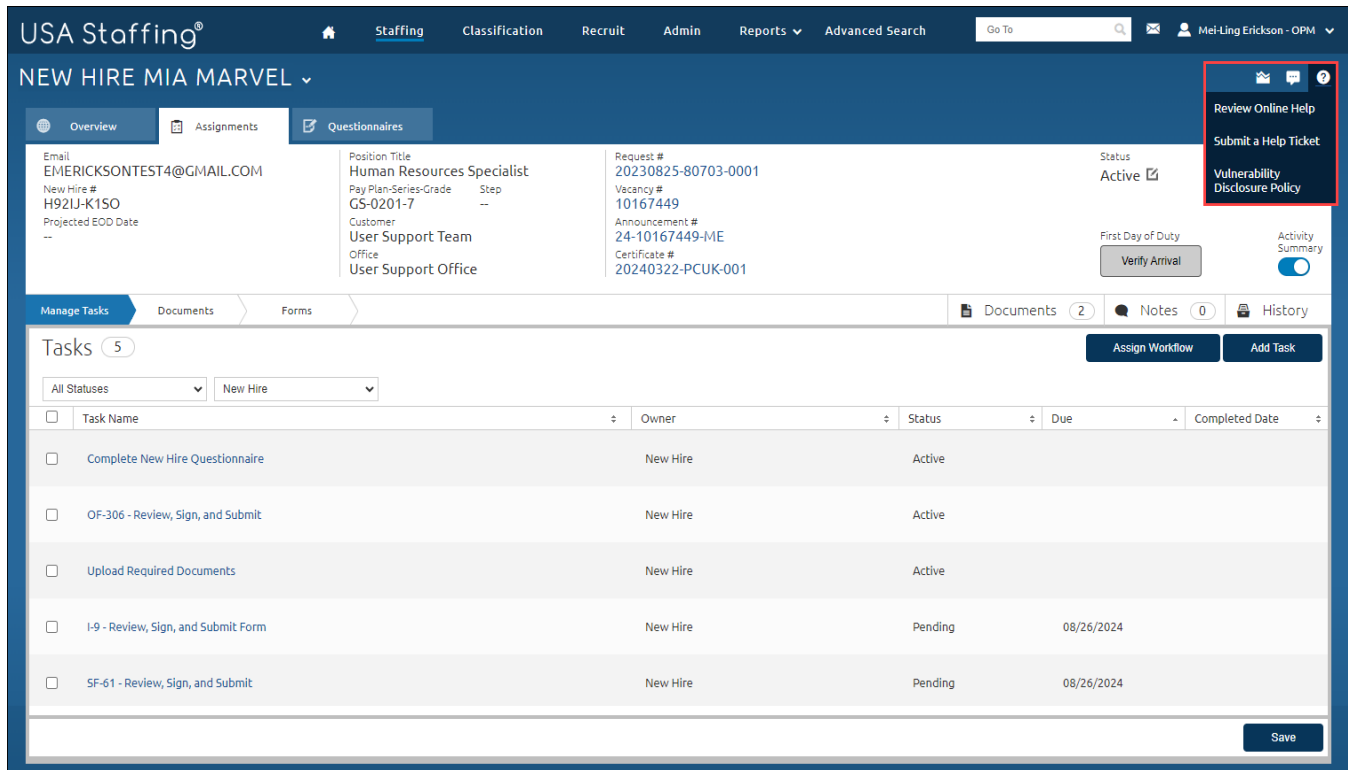


Image 14: A Manage Tasks page in the New Hire's area with the Help button highlighted. This button is located in the upper right quadrant of the page.

17. Select the **Home** button on online help. Next select the following: **Help for USA Staffing HR Users > Help by Page >** scroll down and select **New Hires**. Online Help is context driven, select the Help page from the Manage Tasks page, it will take you to the corresponding Help Page.

USA Staffing® Search USAS

HELP

Navigation

Home

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New Hires

The New Hires page is where you view and create new hire records. The list of new hires on this page is comprised of key entered new hires, as well as those who were marked as selected in the audit process. The number to the right indicates how many new hires are listed. This number updates based on filters applied. To access this page, click the **New Hires** tab on the Dashboard. You can sort most of the columns in this table in ascending or descending order. The following elements are displayed:

USA Staffing® DASHBOARD

Home | Tasks | Requests | Vacancies | **New Hires**

New Hires (7) Create Request

Modify Filters: Status: Active | Process Owner: Kasey Acres | New Hire Name, Number, Email or Start Date | Search

Name	Customer	Process Owner	Status	Start Date	Active Tasks	Logged In
<input type="checkbox"/> Acres, Kona B	User Support Team	Kasey Acres	Active	8/30/2018	2	Yes
<input type="checkbox"/> Acres, Kona	User Support Team	Kasey Acres	Active	11/23/2020	9	No
<input type="checkbox"/> Erickson, Murphy	User Support Customer	Kasey Acres	Active		3	No
<input type="checkbox"/> Hurst, Corey	User Support Online Help	Kasey Acres	Active		8	No
<input type="checkbox"/> Jones, Haggie	User Support	Kasey Acres	Active	5/24/2019	1	No
<input type="checkbox"/> O'Neil, Astrid	User Support	Kasey Acres	Active	6/2/2020	6	No
<input type="checkbox"/> Smith, Ashley	User Support Online Help	Kasey Acres	Active	6/28/2021	20	Yes

• **Create Request.** This button allows you to create a request to onboard a new hire when the selection occurs outside of USA Staffing. For instructions, see [Creating a new hire request](#).

Image 15: Online Help page with the Home button highlighted. The Home button is in the upper left quadrant of the page.

18. Select the **Help by Task** link. Select the **New Hires Tasks** link under New Hires.

HELP

Navigation

Home

Security and Privacy

Privacy Policy
Terms and Conditions of Use

Help by Task

- Registering your Smart Card
- Performing a basic search
- Performing an advanced search
- Viewing user alerts
- Reviewing your permissions
- Reviewing your user preferences
- Clearing your cache or temporary internet files
- Switching between user types
- Switching between tenants
- Opening a tab
- Closing a tab
- Modifying text screen size
- Using Online Help
- Submitting a help ticket after checking online help
- Submitting a help ticket when you cannot log in
- Switching between vacancies or requests
- Adding an external note
- Adding an internal note
- Replying to a note
- Deleting a note
- Viewing notes
- Viewing history
- Filtering a document by document name

Staffing	Admin	Classification and Reports
<p>Dashboard</p> <ul style="list-style-type: none"> • Increasing/decreasing tasks, requests and vacancies displayed on the dashboard • Creating a request • Updating a task from the dashboard • Filtering vacancies <p>Welcome</p> <ul style="list-style-type: none"> • Adding a tile to the welcome tab • Deleting a tile from the welcome tab • Customizing welcome tiles <p>Tasks</p> <ul style="list-style-type: none"> • Filtering tasks • Designating a task as a favorite • Sorting tasks • Opening a task • Opening a task overview • Changing the status of a task • Changing the task owner • Mass changing tasks <p>Request</p> <ul style="list-style-type: none"> • Request Tasks • Location Information Tasks • Staffing Approach Tasks • New Hire Request Tasks • Interdisciplinary Tasks • Wage Grade Tasks <p>Vacancy</p> <ul style="list-style-type: none"> • Vacancy Tasks • Case File Tasks • Eligibilities Tasks • Supporting Documents Tasks • Settings Tasks <p>New Hires</p> <ul style="list-style-type: none"> • New Hire Tasks • Overview Tasks • Assignments Tasks • Manage Tasks Tasks • Documents Tasks • Forms Tasks • Questionnaire Tasks 	<p>Users & Permissions</p> <ul style="list-style-type: none"> • General Contact Tasks • User Record Tasks • Permission Profile Tasks <p>Maintenance</p> <ul style="list-style-type: none"> • Customer Tasks • Tags Tasks <p>Libraries</p> <ul style="list-style-type: none"> • Position Description Tasks • Announcement Item Tasks • Competency Network Tasks • Eligibility Library Tasks • Agency Form Tasks <p>Templates</p> <ul style="list-style-type: none"> • Announcement Template Tasks • Assessment Package Template Tasks • Instructional Template Tasks • Notification Template Tasks <p>Workflow</p> <ul style="list-style-type: none"> • Manage Tasks • Manage Workflows Tasks <p>Default Settings</p> <ul style="list-style-type: none"> • Manage Announcement Default Tasks • Manage Assessment Default Tasks • Manage Vacancy Default Tasks • Manage Review Default Settings Tasks • Manage Applicant List Default Settings Tasks • Manage New Hire Defaults Tasks 	<p>Classification</p> <ul style="list-style-type: none"> • Sorting position descriptions • Filtering position descriptions • Creating a position description • Creating a supervisory position description • Creating a federal wage system position description • Copying a position description • Editing a position description • Adding an Authorization to a PD • Publishing a position description • Unpublishing a position description • Viewing a document from a position description • Uploading documents to a position description • Deleting a document from a position description • Deleting a position description from the position description library • Retiring a position description • Reactivating a retired position description • To export position description to PDF format • Linking position descriptions • PD Review Tasks <p>Cognos</p> <ul style="list-style-type: none"> • Accessing Cognos • Generating a cognos report • Running a cognos reports list • Exporting a cognos report • Saving a cognos report view • Scheduling a cognos report • Subscribing to a cognos report • Running an incomplete applications report

Image 16: Online Help by Task page. New Hires Tasks highlighted to show the variety of options available in online help.

19. Review any desired New Hires task by selecting on the link.

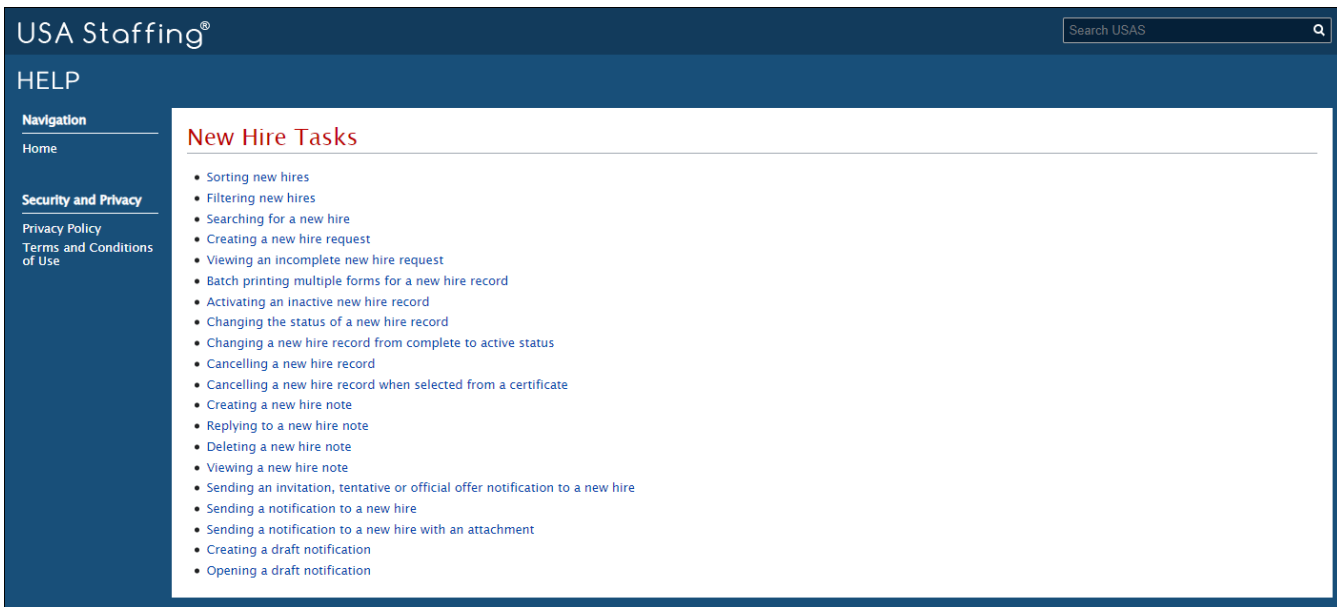


Image 17: Online Help by Task page showing a variety of options available specifically for New Hire Tasks.

20. You can either close the online help tab or return to the New Hires Dashboard by selecting on the open USA Staffing browser tab.

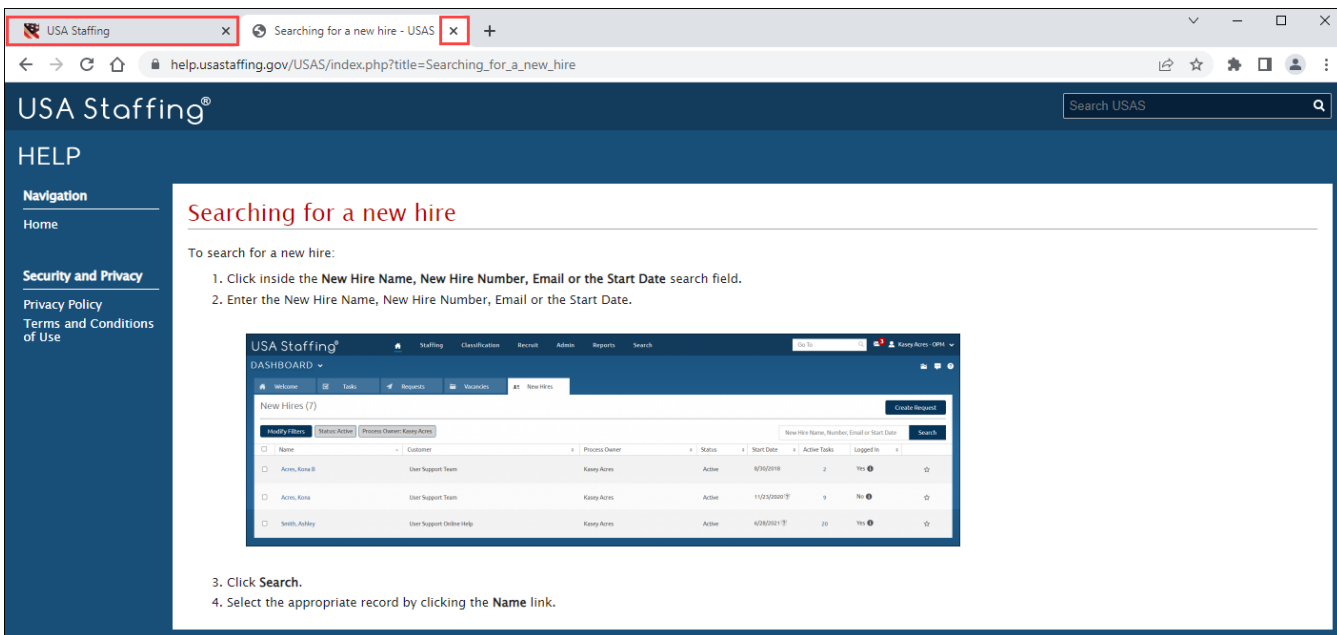


Image 18: Online help page with the navigation bar at the top of the browser highlighted. Since online help opened in a new tab, you can return to USA Staffing by selecting the highlighted tab. You can close the online help by selecting on the highlighted x on the help tab.

This concludes the lesson on Creating a New Hire Record from a Certificate.