

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

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 manually creating a new hire record.

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.

If needed, 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. Select the **Create Request** button on the New Hires tab of your dashboard.

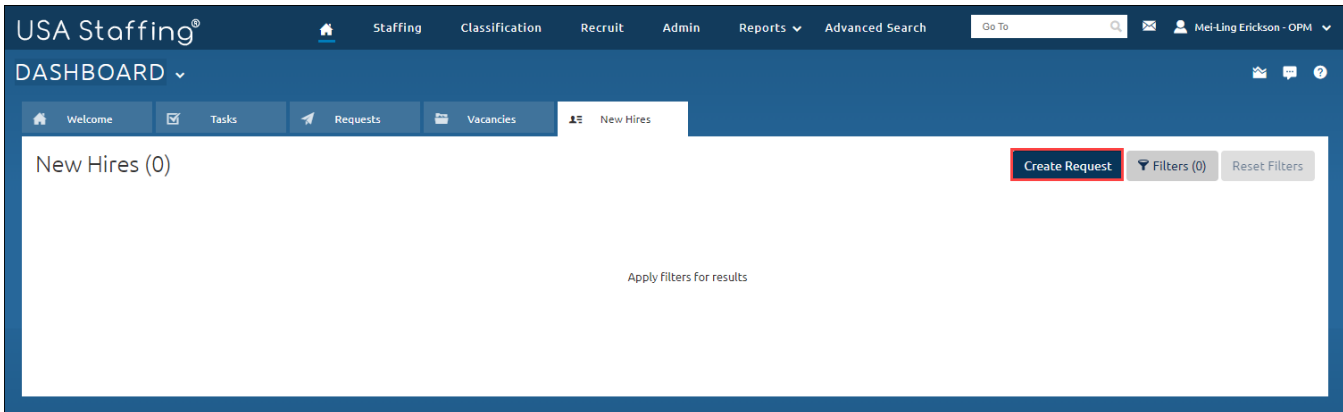


Image 1: New Hires Dashboard with the Create Request button highlighted.

2. Complete the Request Information page.
- Select **Generate** or enter an agency specific request number.
 - Choose a **Requesting Customer** from your drop-down list.
 - Leave the **Request Type** as **Onboard New Hire**.
 - Choose a **Requester** from the drop-down list.
 - Add a **Position Description Number** of **1234**.
 - Enter a **Position Title**.
 - Leave the **Pay Plan** as **GS**.
 - Type and select the appropriate number in the **Series** field.
 - Select the Grade. (You can either type directly in the box and press **Enter** or choose them from the drop-down list.

- j. Do not add any **Specialties**.
- k. Enter dates for the **Hiring Need Validated Date** and **Request Personnel Action** Date fields.
- l. Choose a **security clearance** level.
- m. Change the **Travel Required** to **Occasional Travel**.
- n. Press the **Save** button. This will also activate the **Location Information** and **New Hire** subpages.

USA Staffing®

Staffing Classification Recruit Admin Reports Search

Go To [Search] Mel-Ling Erickson - OPM

REQUEST 20230828-46853

Request 20230828-46853

Request Number: 20230828-46853 Customer: User Support Team Request Type: Onboard New Hire Status: Incomplete

Request Information Location Information New Hire Documents (0) Notes (0) History

Request Information ** Required

Request Number: 20230828-46853 Requesting Customer: User Support Team Request Type: Onboard New Hire

Requester: Mel-Ling Erickson Request Process Owner: Kasey Acres Request Tags: [Empty]

Position Descriptions (1) Interdisciplinary Position

Position Description #	Position Title	Pay Plan	Series	Grade(s)	Specialties
<input type="checkbox"/> 1234	Human Resources Specialist	GS	0201 - Human Resources Manage...	x 11	[+]

Add Position Description

Request Tracking Dates

Hiring Need Validated Date: 8/24/2023 Request Personnel Action Date: 8/28/2023

Position Settings

Position Sensitivity and Risk: [Dropdown]
 Security Clearance Required: Secret
 Travel Required: Occasional travel

Other Requirements

Drug Testing Required
 Financial Disclosure Required

Incentives

Remote Job
 Telework Eligible
 Relocation Authorized

Position Identifiers

Supervisory Position
 Bargaining Unit Position

Save Delete Request Cancel

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

- 3. Select the **Location Information** subpage.
 - a. In the **Find Location** box, type **any City or Zip code** and select the location.
 - b. Enter **1** in the **Vacancies** field.
 - c. Select the **Add Location** button.
 - d. Select **Save**.

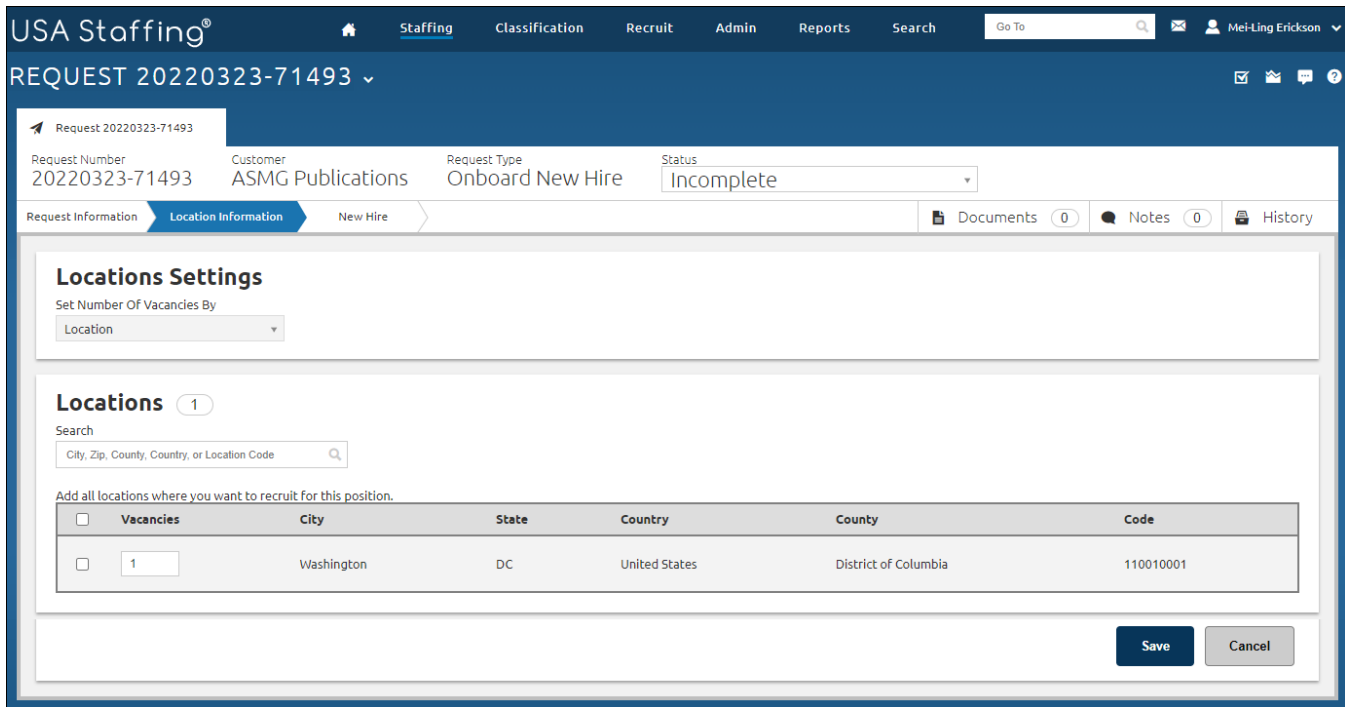


Image 3: Request tab with the Location Information page highlighted.

4. Select the **New Hire** page and complete the request.
 - a. Enter the new hire's **Email Address**.
 - b. Enter the **First Name**, (**Middle Name**) and **Last Name**, (and **Suffix** if applicable).
 - 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 the selections for each of these fields.
 - d. Select the **Approve Request** button. (If the **Approve Request** button does not display, select **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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Staffing Classification Recruit Admin Reports Search Go To Mei-Ling Erickson

REQUEST 20220323-71493

Request 20220323-71493

Request Number: 20220323-71493 Customer: ASMG Publications Request Type: Onboard New Hire Status: Incomplete

Request Information Location Information **New Hire** Documents (0) Notes (0) History

New Hire Information

Email *
murph.erickson@gmail.com

First Name * Middle Name Last Name * Suffix
Oli Vera

Position Information

Position Description Number * Series * Grade *
1234 0201 - Human Resources Management 12

Location *
Washington, District of Columbia, District of Columbia

Onboarding Details

Office * Workflow *
OPM Washington DC Manual Onboarding

Save Approve Request Delete Request

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

- 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. Select the **View New Hire** button to open the new hire record.

USA Staffing® Staffing Classification Recruit Admin Reports Search Mei-Ling Erickson - OPM

REQUEST 20230828-46853 Request 20230828-46853

Request Number: 20230828-46853 | Customer: User Support Team | Request Type: Onboard New Hire | Status: Selection Made

Request Information | Location Information | Documents (0) | Notes (0) | History

Request Information

Request Number	Request Type	Requesting Customer
20230828-46853	Onboard New Hire	User Support Team
Requester	Request Process Owner	Request Tags
Mei-Ling Erickson	Kasey Acres	
Hiring Need Validated Date	Request Personnel Action Date	Approved By
8/24/2023	8/28/2023	Mei-Ling Erickson

Position Descriptions (1)

Position Description Number	Position Title	Pay Plan	Series	Grade	Specialties
1234	Human Resources Specialist	GS	0201 - Human Resources Management	11	

Position Settings

Security Clearance Required	Travel Required	<input type="checkbox"/> Remote Job	<input type="checkbox"/> Drug Testing Required
Secret	Occasional travel	<input type="checkbox"/> Telework Eligible	
Position Sensitivity		<input type="checkbox"/> Supervisory Position	<input type="checkbox"/> Bargaining Unit Position
		<input type="checkbox"/> Relocation Authorized	<input type="checkbox"/> Financial Disclosure Required

Request Locations

Vacancies	City	State	Country	County	Location Code
1	Seattle	WA	United States	King County	531960033

New Hire

[View New Hire](#)

First Name	Middle Name	Last Name	Suffix
Oliq		Vera	
Email	Office	Duty Location	
murph.erickson@gmail.com	User Support Office	Seattle, Washington	
Position Description Number	Series	Grade	
1234	0201	11	

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

- After selecting the **View New Hire** button, you will be directed to the Manage Tasks page of the record. Select the **Overview** tab to assign staff as the **Onboarding Process Owner**, **HR Contacts**, **Benefits Contacts**, and **Payroll Contacts**. Select **Save**. These are the users who will manage the record.

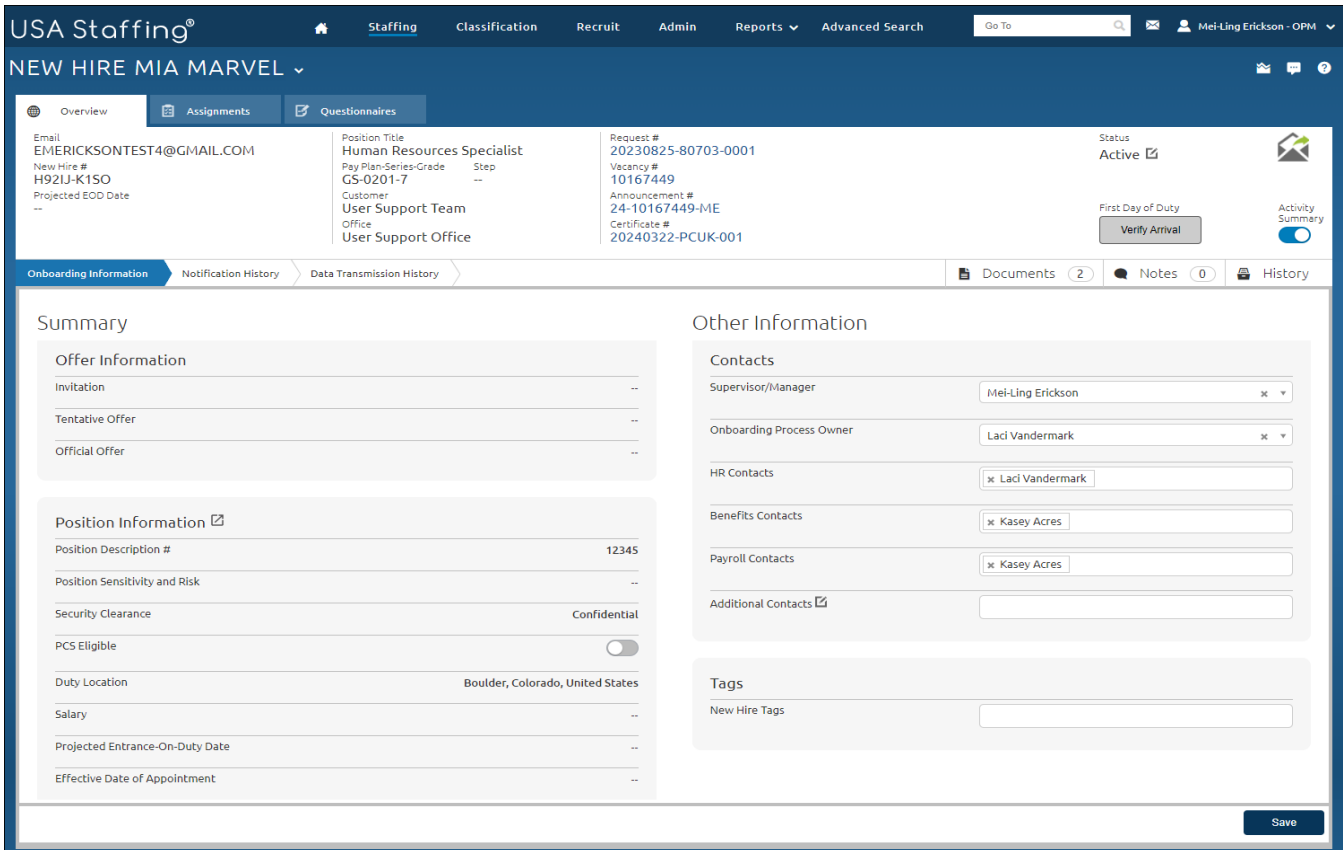


Image 6: Overview page displaying the Contact Information area to assign staff to the record.

7. Select the **Assignments** page, this is where you will begin managing the tasks for the record. Select the **Add Task** button to assign HR task **Send Tentative Offer** and **Send Official Offer** to the record.

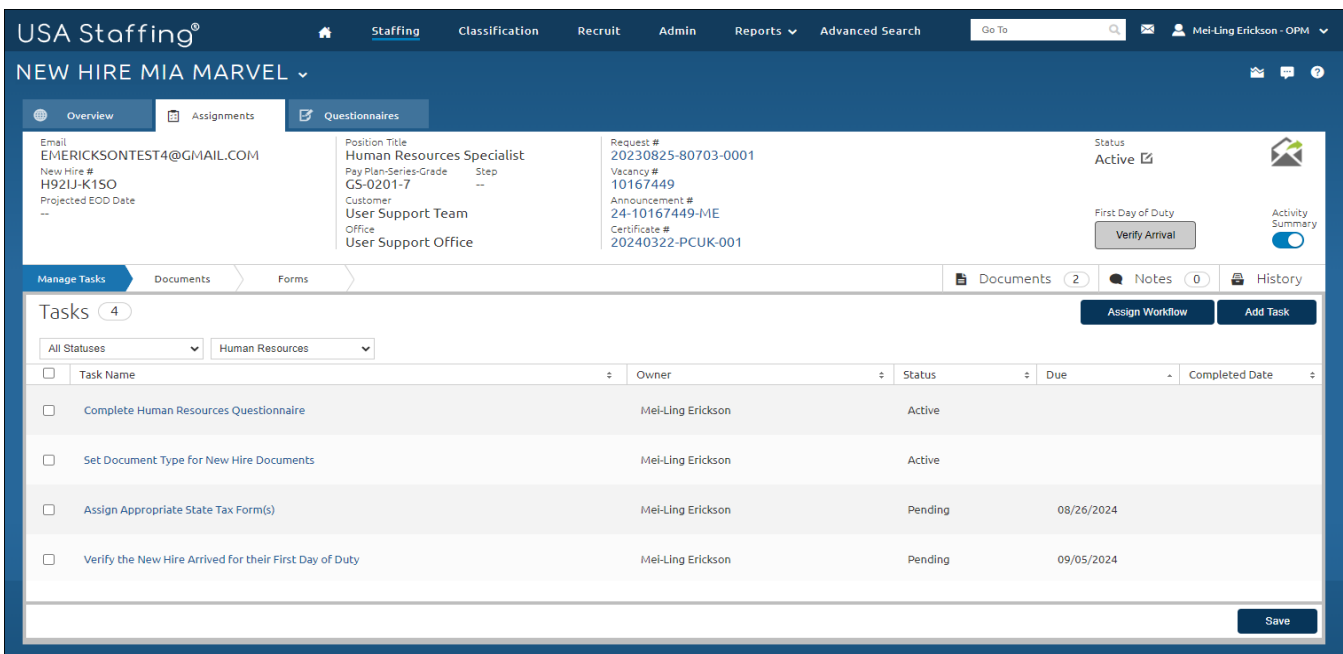


Image 7: A new hire's record is on the Assignments tab with the Manage Tasks page displaying.

- 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 set by your agency for reporting purposes.

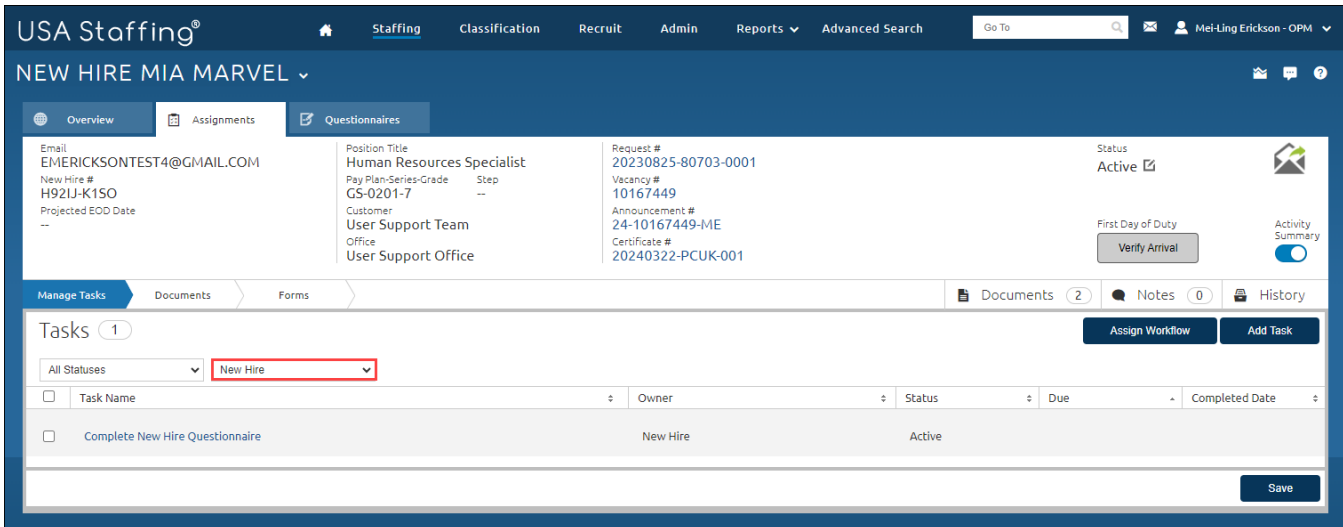


Image 8: A new hire's record is on the Assignments tab with the Manage Tasks page filtered by the New Hire tasks.

- 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).

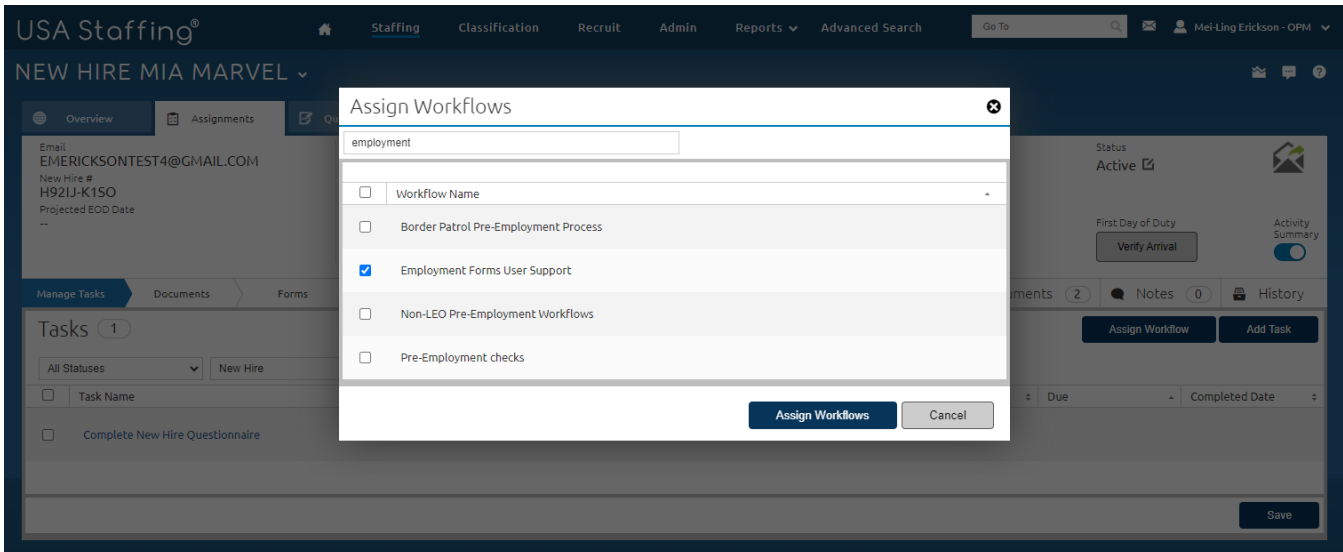


Image 9: A new hire's record is on the Manage Tasks page displaying the Assign Workflows pop-up.

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

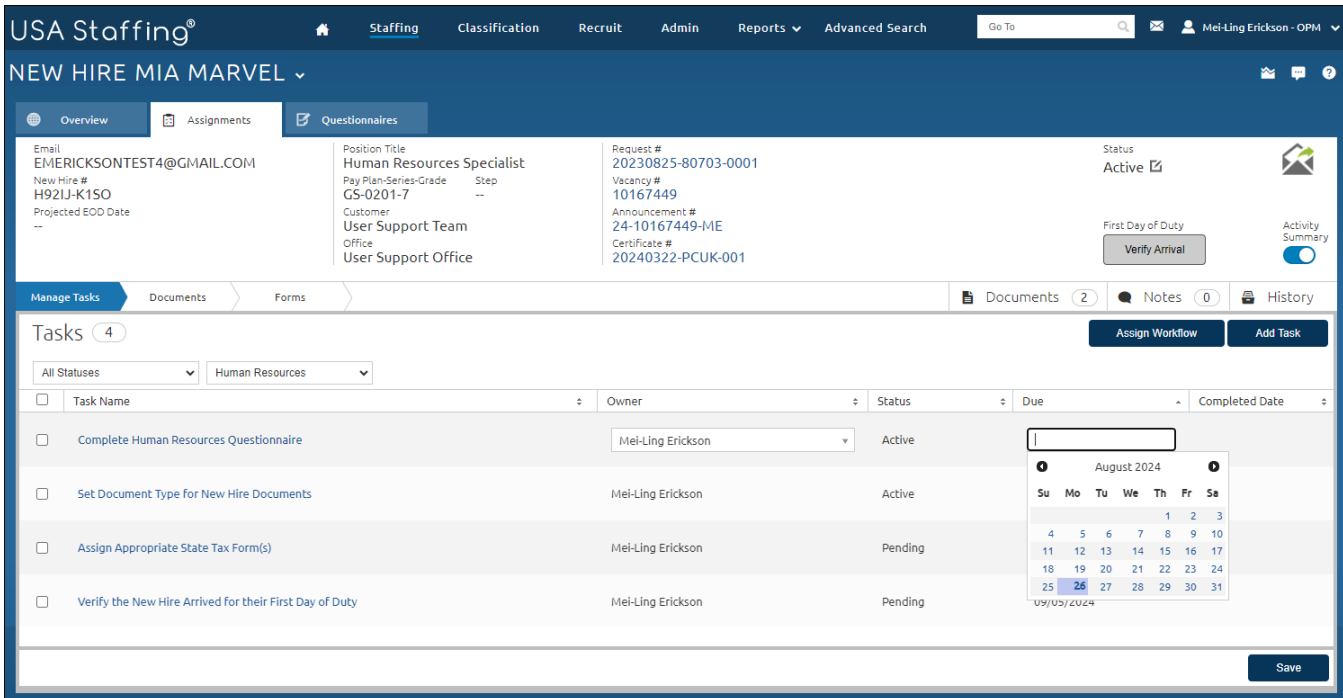


Image 10: A new hire's record is on the Manage Tasks page displaying the tasks assigned from the workflow.

11. Now you are ready to send the job offer to the new hire. 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. Select the **Envelope** icon to initiate sending the job offer notification.

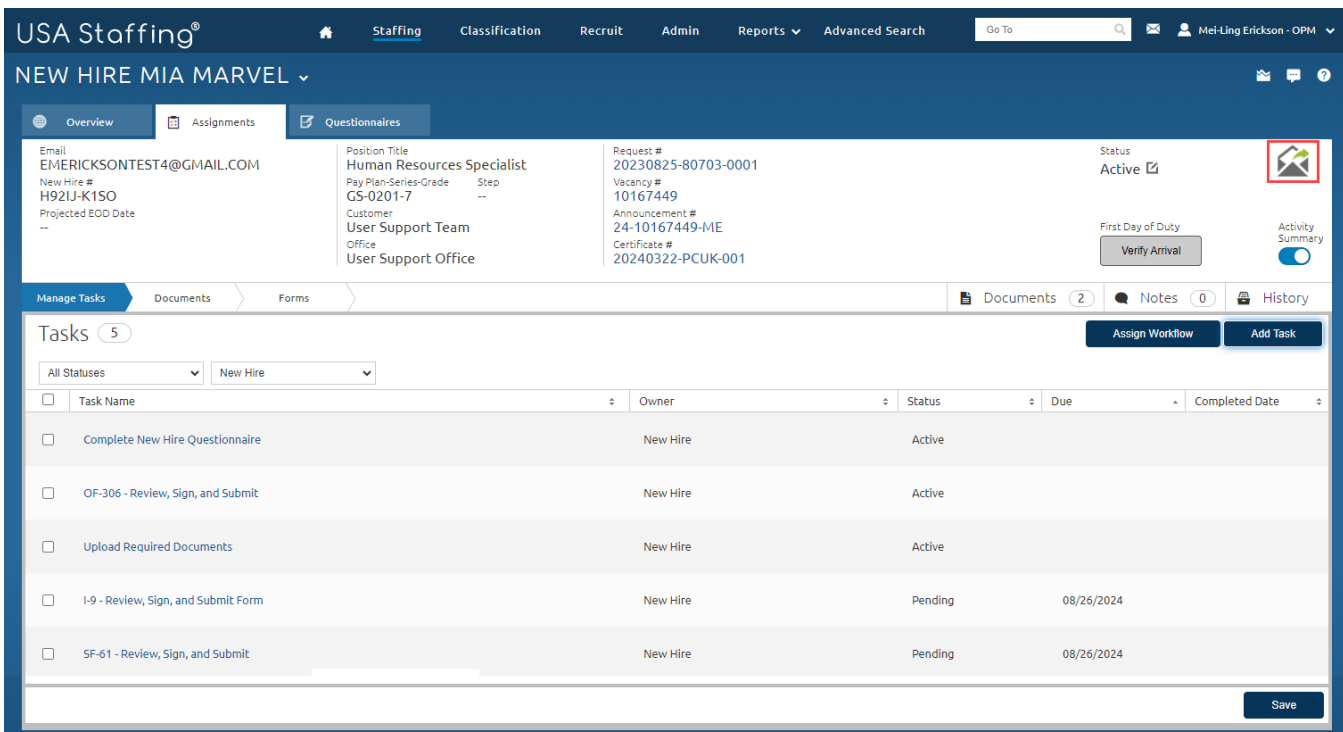


Image 11: A new hire's record is on the Manage Tasks page highlighting the Envelope icon.

12. 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).

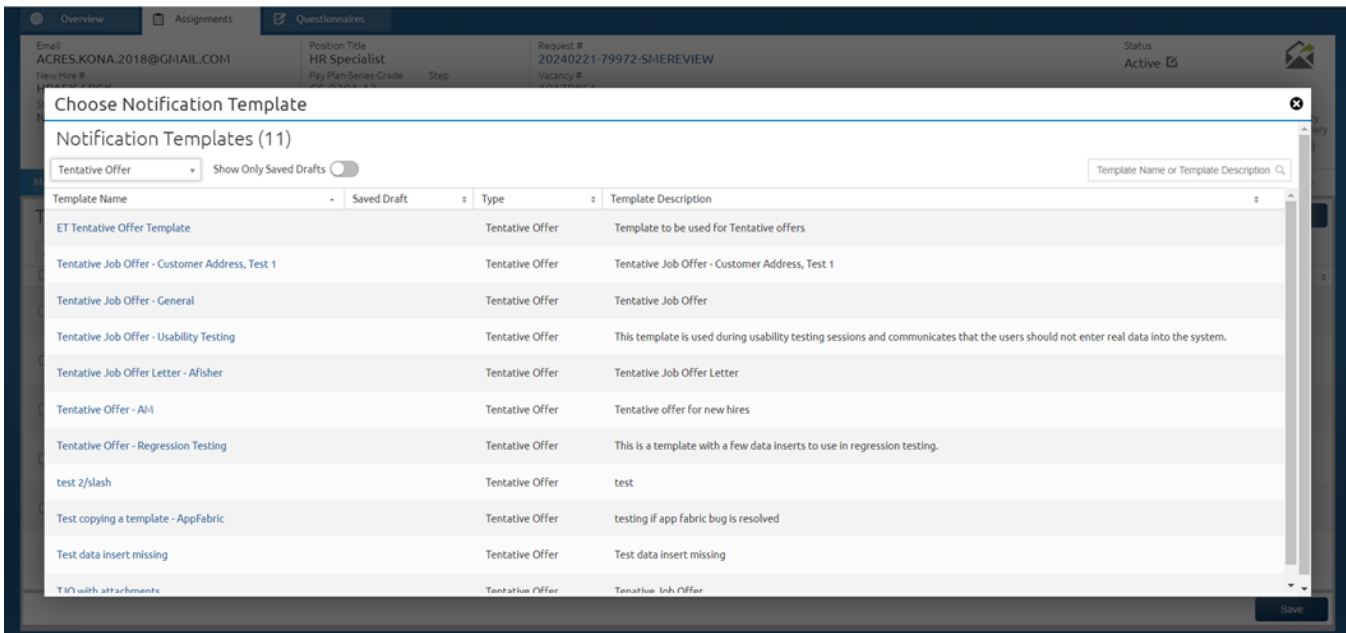


Image 12: Choose Notification Template page.

13. 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.

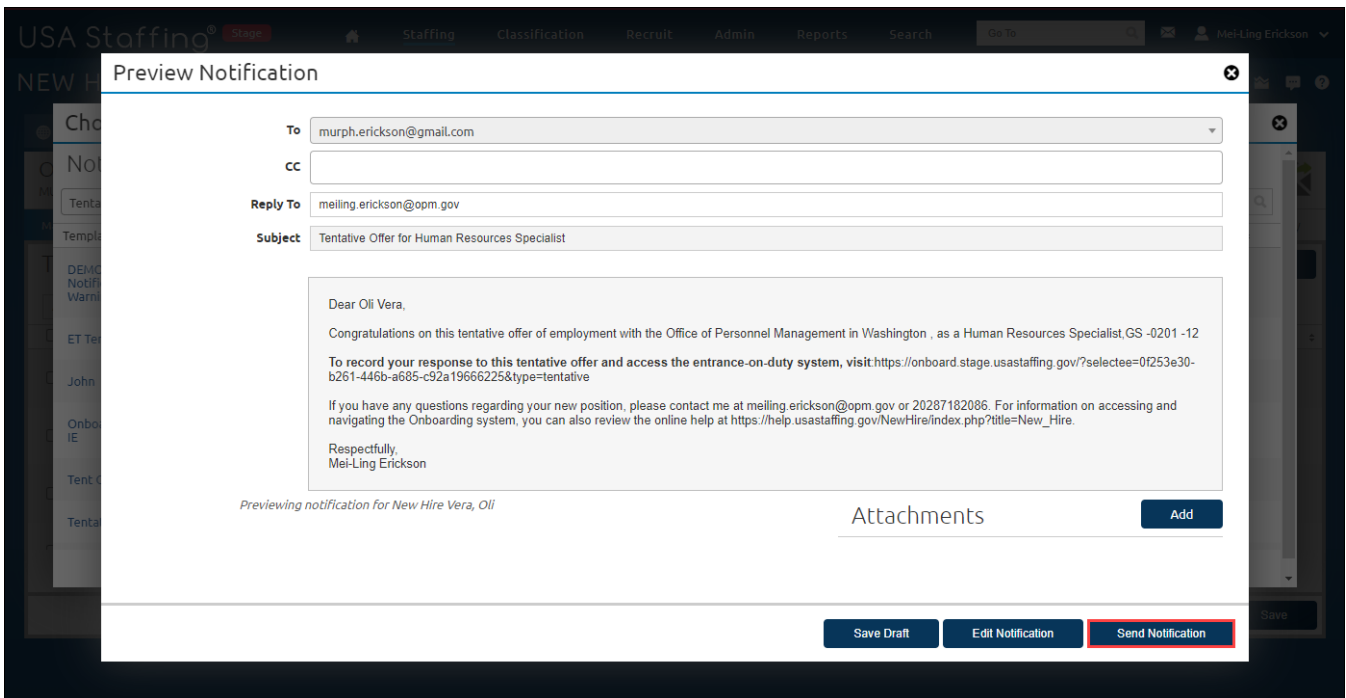


Image 13: The Preview Notification page for the Tentative Offer E-mail.

14. You have a completed request, 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.