

RECEIVED

SEP 15 2021

LABOR RELATIONS



September 7, 2021

Mr. Ivan D. Butts  
President  
National Association of Postal  
Supervisors  
1727 King Street, Suite 400  
Alexandria, VA 22314-2753

Dear Mr. Butts

As a matter of general interest, the Postal Service intends to initiate a pilot project called the HR ServiceNow Onboarding Pilot.

As part of our efforts to stabilize the non-career workforce we plan to test a new onboarding tool designed to improve the onboarding experience during the first 90 days.

This pilot will improve the onboarding experience by creating a standardized workflow that includes additional automation that will reduce manual input. Additionally, this new workflow will provide consistent visibility into onboarding activities conducted by Human Resources, Employee Development, and Field Supervisors throughout the new hire employee's probationary period.

The ME-NH-VT and South Carolina Districts have been selected as the sites for this pilot project.

The pilot is scheduled to start on September 27, 2021 and run through December 31, 2021.

Enclosed is a user guide and the power point slide decks for Trainers, Supervisors, HR Coordinators, and HR Representatives.

Please contact Bruce Nicholson at extension 7773 if you have questions concerning this matter.

Sincerely,

A handwritten signature in blue ink, appearing to read "David E. Mills".

David E. Mills  
Director  
Labor Relations Policies and Programs

Enclosures

# HR Onboarding Pilot

HR Coordinator

## Expectations: Before We Begin

T<sup>3</sup> O<sup>1</sup>

D<sup>3</sup> O<sup>1</sup>

- Be engaged.
- Ask questions in the chat.
- Please mute your phones/microphones.
- Please do NOT place us on hold/multitask.
- This is your training!

## Objective & Goals

- The training session will go over the roles and responsibilities of the Supervisors, Trainers, and HR Representatives in the HR Onboarding Pilot solution. Through this training, HR Coordinators will become familiar with the roles, responsibilities, and privileges for each persona in the HR Onboarding Pilot System:
  - How to access and navigate the different widgets on the HR Onboarding Pilot Supervisor and the HR Onboarding Pilot Training Portals
  - How to create, schedule, and mark attendance for training sessions through individual cases and through bulk updates from the training widget
  - How to access and monitor the HR Onboarding Dashboard
  - How to access and report on a list of ALL Onboarding cases
  - How to access and take action on tasks assigned to Supervisor, Trainer, and HR Representative in the Onboarding Lifecycle Event (e.g. schedule shadow day/report to duty station, complete probationary reviews, etc.)
  - Form 1750 automation
  - How to initiate reassignment of the Supervisor, Trainer, and HR Representative associated to an Onboarding case
  - How to monitor communications (e.g. work notes and emails) associated to HR Onboarding cases
  - How to communicate with new hire, Supervisor, HR Representative, and Training Leads from the system via direct messages (emails)
  - How to communicate within Training Lead, HR Representative, and Supervisors through work notes and comment on the HR case
  - How to create and access quick messages



## Course Modules




Module	Topic Covered	Est. Time (min)
1.	Portal (Homepage widgets, My Requests Page, My To-Dos Page, My Team Page, Helpful Links)	5
2.	Dashboard & Reporting (Navigating to Dashboard, Dashboard tabs, Dashboard filters)	5
3.	Workflow – Supervisor Tasks	30
4.	Workflow – Trainer Tasks	30
5.	Workflow – HR Representative Tasks	30
6.	Cancelling a case	5
7.	Communications (Creating quick messages & using them from Actions UI)	10
8.	Reassignment	5
9.	Submitting a Support Request	5

## Project Overview – HR Onboarding Pilot

### Project Overview

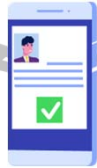
The HR Onboarding Pilot's goal is to create standardized, repeatable, and automated workflows and processes for onboarding procedures and probationary activities for two pilot districts (Maine-New Hampshire-Vermont and South Carolina) for non-career and bargaining positions. It will support automated, electronic means for action and milestone tracking while increasing visibility for the managers and HR professionals tasked with delivering the appropriate communications, training, and performance feedback for new hires.

### Timeline

FY21		FY22					
	SEP	OCT		NOV		DEC	
Pilot Training (9/7-16)							
Pilot (9/17 – 12/31)							
Analyze Results and Feedback							

# Project Overview - USPS HR Onboarding Pilot Journey Map

*I accepted my offer am looking forward to receiving information on next steps.*



## PRE-BOARDING

*I am eager to get started; The Orientation Letter confirmed my position, unit, and details of my Orientation. The New Hire site makes everything very straightforward.*

## DAY 1 (OF ORIENTATION)

*I was able to complete the "Welcome to USPS" training without issue. The Orientation team was very helpful and well-coordinated.*



## WEEK 1

*There was lots to do this week, Onboarding Forms, Driver Training, and additional Orientation Training, but so far everything is going very smoothly.*

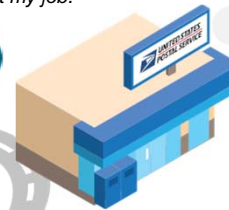
## 30 DAY

*My Supervisor has provided me with very clear feedback, and I was able to clarify my questions and expectations without issue.*



## WEEK 2

*I'm excited to finally take part in a Shadow Day and On the Job training to learn more about my job.*



**NOTE: RCA/ARCs will end System Process at the end of Week 2**

## 60 DAY

*I'm glad I had the opportunity to improve since the previous review. My second review went exactly as I expected.*



## 90 DAY

*Finally! My last review went well, and I am a part of the team. The whole process went smoother than I expected.*



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**NOTE: Shadow Days only apply to newly hired city and rural carriers. If the Shadow Day is not applicable to a newly hired employee, you do not need to complete the action in the HR Onboarding Pilot System**

# Module 1

## Portal Overview



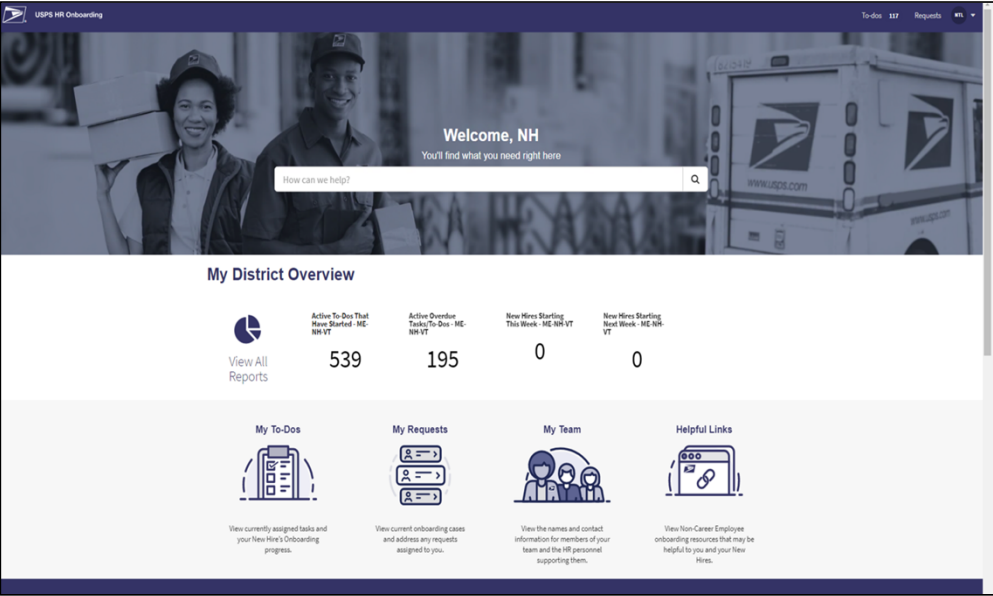
## Portal – URL and Access

- **Environment URL and Access:**
  - Onboarding Portal
    - CAT URL: <https://quspsonboarding.servicenowservices.com/onboarding>
    - PROD URL: <https://uspsonboarding.servicenowservices.com/onboarding>
  - Training Portal
    - CAT URL: <https://quspsonboarding.servicenowservices.com/training>
    - PROD URL: <https://uspsonboarding.servicenowservices.com/training>
- All HR Pilot users will have access prior to go-live. However, if users need access to the system after go-live, they can request access following these steps:
  - To request access, email the HR coordinators. HR Coordinators will submit a Support Request in the HR Onboarding Pilot system. The HR Onboarding Pilot Tier 2 team will grant access and notify the HR coordinators. HR Coordinators will notify the users.

# Portal

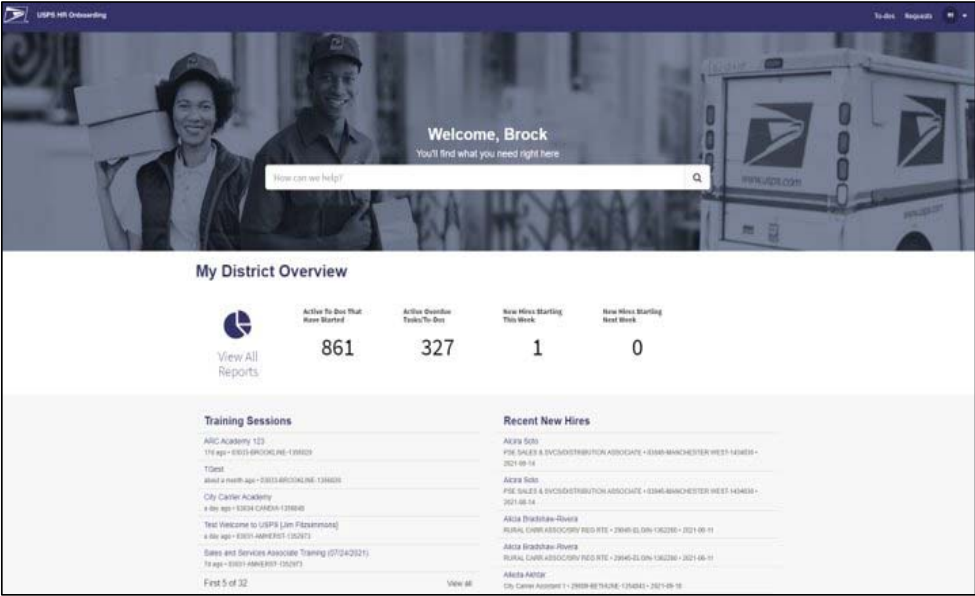
## Onboarding Portal

Supervisors will access the Pilot through the Onboarding Portal



## Training Portal

Trainers and HR Representatives will access the Pilot through the Training Portal



## Training Widget – Scheduling a Session

The HR Onboarding “Training Widget” provides a convenient method for Trainers to create, schedule, and mark attendance for orientation and training sessions in bulk

### Schedule a Training Session:

- Trainers can use this functionality to schedule/create various training sessions

The screenshot shows the 'Schedule a Training Session' interface. At the top, there's a title bar 'Schedule a Training Session'. Below it, a navigation bar has three tabs: 'Training Details' (active), 'Attendees', and 'Summary'. The main content area is titled 'New Training Session' and contains several form fields: 'Date/Time' with a calendar icon, 'Location' with a dropdown, 'Training Type' with a dropdown, 'Training Facilitator' with a dropdown, 'Course Title' with a text input, and 'Course Description' with a text area. A 'Submit' button is at the bottom right, and an 'Add attachments' link is at the bottom left.

### Add Attendees:

- Trainers can add attendees while they are creating the training as well as at a later time

The screenshot shows the 'Attendees' table interface. At the top, there's a title bar 'Attendees' and a search bar. Below the search bar, there's a note: 'Search bar can be used to look for new hires by name, position, occupation code, designation/activity code, location, effective date, or HR Rep.' and an 'Add Selected' button. The table has the following columns: Name, Position, Occupation Code, Designation/Activity Code, Location, Effective Date, and HR Rep. The table contains six rows of data, each with a checkbox in the first column.

	Name	Position	Occupation Code	Designation/Activity Code	Location	Effective Date	HR Rep
<input type="checkbox"/>	Tomsof Anna	PSE SALES & SVCS/DISTRIBUTION ASSOCIATE	2395-0017	120	33054-ROYAL PALM-1449534	2021-04-01	SC HR Representative
<input type="checkbox"/>	Tomsof Anna		2325-07XX	120	30320-PEACHTREE-1352485	2021-04-11	NH HR Representative
<input type="checkbox"/>	Barbara Na	City Carrier Assistant 1	2310-0045	814	29020-CAMDEN-1356735	2021-04-25	SC HR Representative
<input type="checkbox"/>	Sahadat Campbell	City Carrier Assistant 1	2310-0045	814	29009-BETHUNE-1354843	2021-04-25	SC HR Representative
<input type="checkbox"/>	Prinda Edwards I	City Carrier Assistant 1	2310-0045	813	29020-CAMDEN-1356735	2021-04-25	SC HR Representative
<input type="checkbox"/>	PAMSmhaeleven TwentyFour	MAIL HANDLER ASSISTANT	2315-0085	813	29009-BETHUNE-1354843	2021-04-25	SC HR Representative

# Training Widget – Managing Sessions & Attendance

**The HR Onboarding “Training Widget” provides a convenient method for Trainers to create, schedule, and mark attendance for orientation and training sessions in bulk**

## Edit Session Details:

- Trainers can change details of the session (e.g., in case of rescheduling a training)

The screenshot shows the 'Edit Session Details' form for the 'City Carrier Academy' training. The form includes fields for Course Title, Location, Training Type, Date/Time, Facilitator, and Training Hours. A 'Save (Ctrl + s)' button is at the bottom right.

Field	Value
Course Title	City Carrier Academy
Location	03034-CANDIA-1356848
Training Type	City Carrier Academy
Date/Time	2021-08-03 09:00:09
Facilitator	Brock Sizer
Training Hours	

## Mark Attendance:

- Trainers can add or remove attendees as well as mark their attendance (including hours)

The screenshot shows the 'Mark Attendance' table with columns for Attendee Name, ID, Effective Date, Hours, and Notes. The table lists six attendees with their respective details. At the bottom right, there are buttons for 'Edit Attendees' and 'Log Attendance and Close Training'.

Attendee Name	ID	Effective Date	Hours	Notes
Nick Perez	04101-ME-NH-VT-1434697	Effective 2021-05-30	hrs	
Lisa Samuel City Carrier Assistant 1	03033-BROOKLINE-1356020	Effective 2021-05-22	hrs	
Tyra Banks RURAL CARR ASSOC/SRV REG RTE	03042-EPPING-1362675	Effective 2021-06-05	hrs	
Twyla Cordova PSE SALES & SVCS/DISTRIBUTION ASSOCIATE	51006-BATTLE CREEK-1354205	Effective 2021-05-31	hrs	
Hsialin Allen ASSISTANT RURAL CARRIER (ARC)	29045-ELGIN-1362260	Effective 2021-04-28	hrs	
Jia Saloni City Carrier Assistant 2	03049-HOLLIS-1367208	Effective 2021-05-07	hrs	



# Module 2

## Dashboard & Reporting

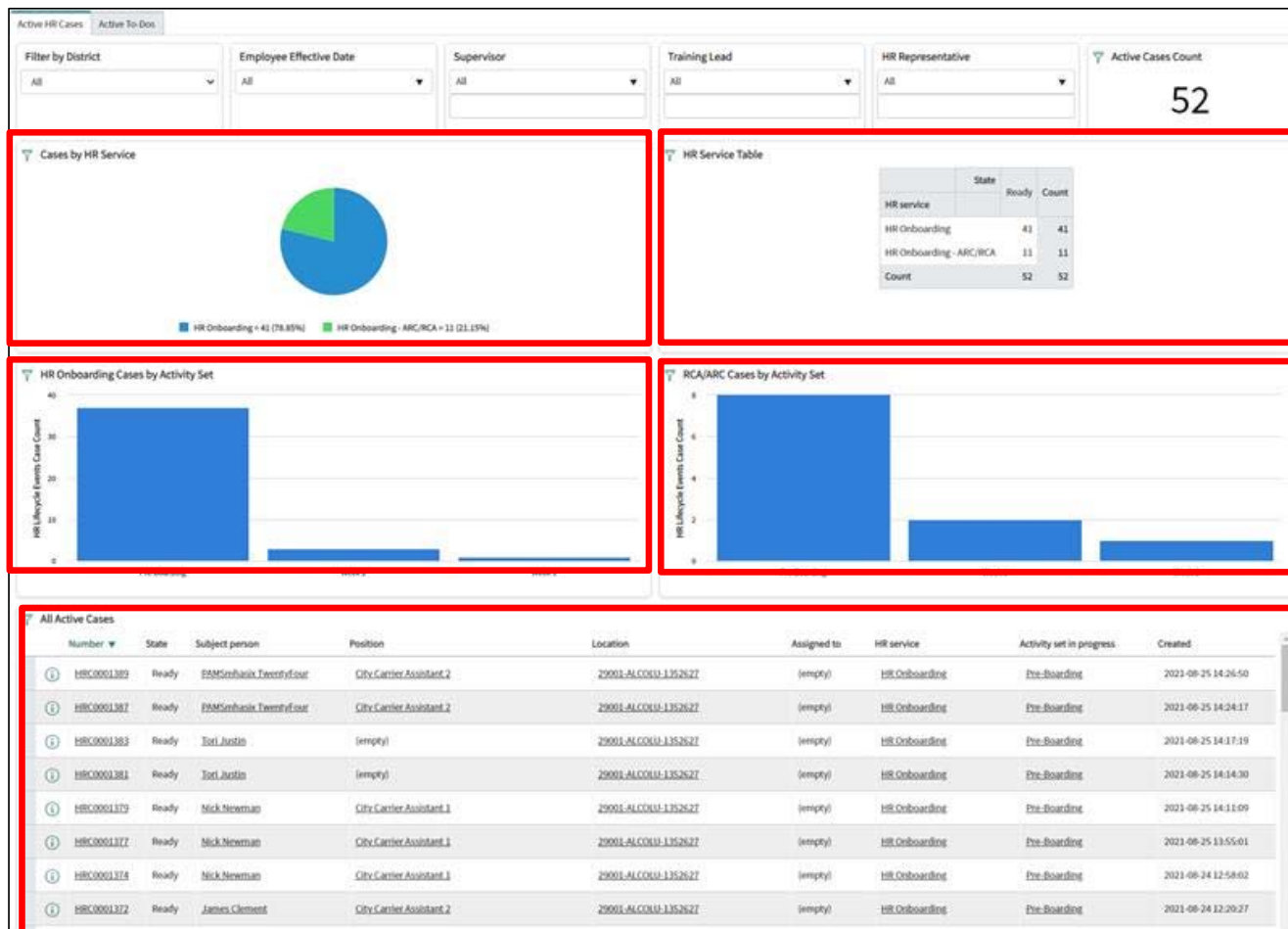
# Dashboard & Reporting – Active HR Cases

## • Metrics

- Active Cases Count (Number)
- Cases by HR Service
- HR Service Table
- Onboarding Cases by Activity Set
- RCA/ARC Cases by Activity Set
- All Active Cases

## • Filters

- District
- Employee Effective Date
- Supervisor
- HR Representative
- Training Lead



## Dashboard & Reporting – Active To-Dos

- **Metrics/Reports**

- Active To-Dos That Have Started
- All Active To-Dos

- **Filters**

- District
- Employee Effective Date
- Assigned To
- Due Date

Active HR Cases

Active To-Dos

Filter To-Dos by District

All

Assigned to

All

Employee Effective Date

All

Due Date

Last 7 days

Active To-Dos That Have Started

458

Active To-Dos

Number	Parent	Subject person	Short description	Position	Location	State	Assigned to	Due date
① HRT0004799	HRC0001315	Lisa Samuel	Enter ratings and generate 60-day review form	City Carrier Assistant 1	03033-BROOKLINE-1356020	Ready	NH Supervisor	2021-07-23 00:00:00
① HRT0004797	HRC0001315	Lisa Samuel	Determine if New Hire should be removed from rolls	City Carrier Assistant 1	03033-BROOKLINE-1356020	Ready	NH HR Representative	2021-07-23 00:00:00
① HRT0004800	HRC0001315	Lisa Samuel	Participate in 60 Day Review	City Carrier Assistant 1	03033-BROOKLINE-1356020	Ready	Lisa Samuel	2021-07-23 00:00:00
① HRT0004786	HRC0001315	Lisa Samuel	Schedule 80-Day Review	City Carrier Assistant 1	03033-BROOKLINE-1356020	Ready	NH Supervisor	2021-07-23 00:00:00
① HRT0004798	HRC0001315	Lisa Samuel	Conduct 60-Day Review	City Carrier Assistant 1	03033-BROOKLINE-1356020	Ready	NH Supervisor	2021-07-23 00:00:00
① HRT0003961	HRC0001249	Martha Gamblin	Prepare for Orientation	ASSISTANT RURAL CARRIER (ARC)	29041-DAVIS STATION-1437129	Ready	Martha Gamblin	2021-07-23 18:52:14
① HRT0003984	HRC0001251	Alleda Akhtar	Contact New Hire regarding job requirements	City Carrier Assistant 1	29009-BETHUNE-1354843	Ready	SC Supervisor	2021-07-23 18:52:20
① HRT0003965	HRC0001251	Alleda Akhtar	Prepare for Orientation	City Carrier Assistant 1	29009-BETHUNE-1354843	Ready	Alleda Akhtar	2021-07-23 18:52:20
① HRT0003979	HRC0001251	Alleda Akhtar	Send New Hire Travel & Booking information if required	City Carrier Assistant 1	29009-BETHUNE-1354843	Ready	SC HR Representative	2021-07-23 18:52:20
① HRT0003978	HRC0001251	Alleda Akhtar	Enter Report to Unit/Duty Station Details	City Carrier Assistant 1	29009-BETHUNE-1354843	Ready	SC Supervisor	2021-07-23 18:52:25

**NOTE:** HR Onboarding Pilot fulfiller users (Supervisors, Trainers, HR Representatives) can create their own reports and share the report with specific users and/or groups. Instructions in the corresponding Lab.

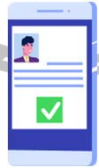
# Module 3

Workflow - Supervisor Tasks



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## 30 DAY

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**NOTE: RCA/ARCs will end System Process at the end of Week 2**

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## Workflow – Activity Sets

### Activity Sets:

Depict the stages of the onboarding process, they can include:

- **Pre-Boarding**
- **Day 1**
- **Week 1**
- **Week 2**
- **Day 30**
- **Day 60**
- **Day 80**

**Note:** ARCs/RCA's will not have Day 30, 60, or 80 Activity Sets

HR Onboarding: Gerardo Li

Actions ▼

GL New Hire Gerardo Li SS Supervisor SC Supervisor SHR HR Rep SC HR Representative STL Training Rep SC Training Lead

Effective Date 2021-10-19 Employment Type Non-Career Employee Position MAIL HANDLER ASSISTANT Location 29037-CHAPPELLS-1357657

Tasks/To-Dos Activity Attachments

Timeline

- ✓ Pre-Boarding
- ✓ Day 1
- ✓ Week 1
- Week 2
- Day 30
- Day 60
- Day 80

Week 2 4/6 completed

All (2) Show completed to-dos Show upcoming to-dos

Participate in Initial Meeting with Supervisor Due in 7 days

Determine if New Hire should be removed from rolls Due in 7 days

View all to-dos

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## Workflow – Preboarding Tasks

### Schedule Report to Duty Station:

Supervisors will use this task to schedule the date a New Hire has to report to their duty station. Once the task is marked complete by the Supervisor, an email is sent to the New Hire with the information to prepare for reporting to their duty station including the date and location

**NOTE:** If the task is completed prior to the New Hire's effective date, a system generated email containing the relevant information will be sent. However, if the task is completed past the New Hire's effective date, no system generated email will be sent to the New Hire and it will be the responsibility of the Supervisor to communicate the relevant information to the New Hire outside the HR Onboarding Pilot system

HR Onboarding: Jia Saloni

Actions

New Hire: Jia Saloni  
Effective Date: 2021-05-07

Supervisor: NH Supervisor  
Employment Type: Non-Career Employee

HR Rep: NH HR Representative  
Position: City Carrier Assistant 2

Training Rep: NH Training Lead  
Location: 03049-HOLLIS-1367208

Tasks/To-Dos Activity Attachments

Pre-Boarding

Contact New Hire regarding job requi...  
Overdue 3 days

Enter Report to Unit/Duty Station Det...  
Overdue 3 days

Enter Report to Unit/Duty Station Details  
HRT0004963 Overdue 3 days

Attachments History

Ask a Question

HRT0004963 Unit/Duty Station Schedule

\*Date

\*Location

Cancel Save Submit



## Workflow – Preboarding Tasks

### Supervisor Checklist:

A checklist is available for Supervisors through this task outlining what needs to be discussed with the New Hire when Supervisors contact them for job requirements

The screenshot displays the 'HR Onboarding: Jia Saloni' interface. At the top, there are four user cards: 'New Hire Jia Saloni' (Effective Date: 2021-05-07), 'Supervisor NH Supervisor' (Employment Type: Non-Career Employee), 'HR Rep NH HR Representative' (Position: City Carrier Assistant 2), and 'Training Rep NH Training Lead' (Location: 03049-HOLLIS-1367208). Below these are tabs for 'Tasks/To-Dos', 'Activity', and 'Attachments'. The 'Tasks/To-Dos' tab is active, showing a list of tasks. The first task, 'Contact New Hire regarding job requirements' (HRT0004969, Overdue 3 days), is highlighted with a red box. To the right of this task, there is a detailed view of the task, also outlined in red. This view includes a 'Contact Information' section with fields for Name (Jia Saloni), Phone, and Email. Below this is a 'Supervisor Checklist' with a list of items to be discussed: Initial work assignment, Job, duties, roles, and responsibilities, Performance expectations, Work hours, Probationary period guidelines, Time and Attendance Control System (TACS), Leave guidelines and requests/eRMS (PS Form 3971), Introduction to coworkers and key contacts, USPS National Emergency Hotline number, and Supply requests. At the bottom of this detailed view is a 'Complete' button.

HR Onboarding: Jia Saloni

Actions

New Hire Jia Saloni  
Effective Date: 2021-05-07

Supervisor NH Supervisor  
Employment Type: Non-Career Employee

HR Rep NH HR Representative  
Position: City Carrier Assistant 2

Training Rep NH Training Lead  
Location: 03049-HOLLIS-1367208

Tasks/To-Dos Activity Attachments

Pre-Boarding

Contact New Hire regarding job requirements  
HRT0004969 Overdue 3 days

Attachments History

Ask a Question

Contact your New Hire to welcome them to USPS and review their job requirements - including work hours, days off and approximate

Contact Information:  
Name: Jia Saloni  
Phone:  
Email:

Supervisor Checklist

- Initial work assignment
- Job, duties, roles, and responsibilities
- Performance expectations
- Work hours
- Probationary period guidelines
- Time and Attendance Control System (TACS)
- Leave guidelines and requests/eRMS (PS Form 3971)
- Introduction to coworkers and key contacts
- USPS National Emergency Hotline number
- Supply requests

Contact New Hire regarding job requirements  
Click on the Complete button to mark task as complete.

Complete

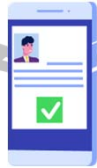
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*I accepted my offer and am looking forward to receiving information on next steps.*



## PRE-BOARDING

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## WEEK 1

*There was lots to do this week, Onboarding Forms, Driver Training, and additional Orientation Training, but so far everything is going very smoothly.*

## 30 DAY

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## WEEK 2

*I'm excited to finally take part in a Shadow Day and On the Job training to learn more about my job.*



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## 60 DAY

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## Workflow – Day 1 Tasks

### Schedule Shadow Day:

If applicable Supervisors can use this task to schedule the date a New Hire has to attend Shadow Day. Once the task is marked complete by the Supervisor, an email is sent to the New Hire with the information to prepare for Shadow Day including the date and location

**NOTE:** If the task is completed prior to the New Hire's effective date, a system generated email containing the relevant information will be sent. However, if the task is completed past the New Hire's effective date, no system generated email will be sent to the New Hire and it will be the responsibility of the Supervisor to communicate the relevant information to the New Hire outside the HR Onboarding Pilot system

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## Workflow – Week 1 Tasks

### Scheduling Initial Meeting with Supervisor:

Supervisors will use this task to schedule the date a New Hire has their initial probationary meeting with the Supervisor. Once the task is marked complete by the Supervisor, an email is sent to the New Hire with the information needed for the meeting including the date and location of the meeting as well as duration

**NOTE:** If the task is completed prior to the New Hire's effective date, a system generated email containing the relevant information will be sent. However, if the task is completed past the New Hire's effective date, no system generated email will be sent to the New Hire and it will be the responsibility of the Supervisor to communicate the relevant information to the New Hire outside the HR Onboarding Pilot system

The screenshot displays the 'HR Onboarding: Jia Saloni' interface. At the top, there are four profile cards: New Hire (Jia Saloni, Effective Date: 2021-05-07), Supervisor (Jia Saloni, Employment Type: Non-Career Employee), HR Rep (NH HR Representative, Position: City Carrier Assistant 2), and Training Rep (NH Training Lead, Location: 03049-HOLLIS-1367208). Below these are tabs for 'Tasks/To-Dos', 'Activity', and 'Attachments'. The 'Tasks/To-Dos' tab is active, showing a list of tasks for 'Week 1'. The task 'Schedule Initial Meeting with Superv...' is highlighted with a red box. To the right, a modal window for 'HRT0004944 Schedule Initial Meeting with Supervisor' is open, also highlighted with a red box. This modal contains fields for 'Enter Meeting Time:', 'Duration (Enter time in Minutes):' (with a range of 10-120), and 'Location:'. At the bottom of the modal are 'Cancel', 'Save', and 'Submit' buttons.

## Workflow – Week 1 Tasks

### Shadow Day Checklist:

If applicable Supervisors can use this checklist to view how they can prepare for the New Hire's Shadow Day. Supervisors can download the checklist displayed in the task

HR Onboarding: Jia Saloni

Actions

New Hire: Jia Saloni  
Effective Date: 2021-05-07

Supervisor: NH Supervisor  
Employment Type: Non-Career Employee

HR Rep: NH HR Representative  
Position: City Carrier Assistant 2

Training Rep: NH Training Lead  
Location: 03049-HOLLIS-1367208

Tasks/To-Dos Activity Attachments

Week 1

- Welcome New Hire to the Unit/Duty ... Due in 4 days
- Enter New Hire time into TACS (Week 1) Due in 4 days
- Prepare for Shadow Day with New Hire Due in 4 days**
- Prepare for New Hire's First Day in th... Due in 4 days
- Schedule Initial Meeting with Superv... Due in 4 days

Prepare for Shadow Day with New Hire  
HRT0004938 Due in 4 days

Attachments History Ask a Question

**New Hire Intro to Unit Checklist**

SECTION 1 – General Information (Complete for each new hire)

Employee Name: \_\_\_\_\_  
EIN: \_\_\_\_\_  
Unit Name & Finance: \_\_\_\_\_  
Effective Date: \_\_\_\_\_  
Shadow Day Date: \_\_\_\_\_  
First Day in Unit Date: \_\_\_\_\_

SECTION 2 – Management Process Checklist (Initial and date each step when complete)

**PART A – The Shadow Day**

Preparation for Shadow Day – Postmaster / Manager

	Initial	Date
A1		
A2		
A3		
A4		
A5		
A6		

## Workflow – Week 1 Tasks

### Enter Time in TACs:

This task is a reminder for Supervisor's to enter the New Hire's time in the Time and Attendance System (TACs) outside of the HR Onboarding Pilot system

HR Onboarding: Jia Saloni

Actions

JIS

New Hire  
Jia Saloni

Effective Date  
2021-05-07

NS

Supervisor  
NH Supervisor

Employment Type  
Non-Career Employee

MHR

HR Rep  
NH HR Representative

Position  
City Carrier Assistant 2

NTL

Training Rep  
NH Training Lead

Location  
03049-HOLLIS-1367208

Tasks/To-Dos

Activity

Attachments

< Week 1

Enter New Hire time into TACS (Week 1)  
HRT0004939 Due in 4 days

Attachments History

Ask a Question

Welcome New Hire to the Unit/Duty ...  
Due in 4 days

Enter New Hire time into TACS (Week 1)  
Due in 4 days

Prepare for Shadow Day with New Hire  
Due in 4 days

Prepare for New Hire's First Day in th...  
Due in 4 days

Schedule Initial Meeting with Superv...

Be sure to enter your New Hire's time into TACS for their first week. If your New Hire completed training, you should have received a copy of their timecard from the Training facilitator.

Enter New Hire time into TACS (Week 1)  
Click on the Complete button to mark task as complete.

Complete

## Workflow – Week 1 Tasks

### Prepare for New Hire's first day Unit/Duty Station:

A checklist is available for Supervisors through this task outlining how they can prepare for the New Hire's first day at Unit/Duty Station. Supervisors can download the checklist displayed in the task

HR Onboarding: Jia Saloni

New Hire: Jia Saloni  
Effective Date: 2021-05-07

Supervisor: NH Supervisor  
Employment Type: Non-Career Employee

HR Rep: NH HR Representative  
Position: City Carrier Assistant 2

Training Rep: NH Training Lead  
Location: 03049-HOLLIS-1367208

Tasks/To-Dos Activity Attachments

Week 1

Welcome New Hire to the Unit/Duty ...  
Due in 4 days

Enter New Hire time into TACS (Week 1)  
Due in 4 days

Prepare for Shadow Day with New Hire  
Due in 4 days

**Prepare for New Hire's First Day in th...**  
Due in 4 days

Schedule Initial Meeting with Superv...  
Due in 4 days

Prepare for New Hire's First Day in the Unit/Duty Station  
HRT0004940 Due in 4 days

Attachments History

Ask a Question

1 of 2

**PART B – Preparing for the first day in the unit – Postmaster / Manager**

Prepare Welcome Introduction Package (Recommended Items)		Initial	Date
B1	Order USPS Knit Cap eBay # 5447626-517924-NAV-ONESZ-23		
B2	Order USPS Mesh Baseball Cap eBay # 5447642-517928-NAV-ONESZ-36		
B3	Order USPS Vest eBay # 112291		
B4	Order USPS Water bottle eBay # 5447641-517927-ROY-ONESZ-30		
B5	Order Carrier Satchel Topeka NSN: 8465-01-141-0813 (CCA)		
B6	Order Satchel Buckle Topeka NSN: 5340-02-000-8196 (CCA)		
B7	Order Satchel Strap Topeka NSN: 8465-01-365-1060 (CCA)		
B8	Order Satchel Shoulder Pad NSN: 8465-01-365-7843 (CCA)		
B9	Order Dog Spray eBay # S1001152		
B10	Binder to collect route maps eBay # 7510-01-510-4865		
B11	Contact phone numbers - Office hotline, Postmaster, Supervisor, and Union		
B12	Dog Repellent Holster eBay # S1001153		
B13	Headlamp eBay # 7665814		
B14	Scanner Holster eBay # S1310		
B15	Scotch Tray eBay # N1019546		
B16	Forms: PS-3849, PS-3575, PS-3546		
B17	COVID: Face Masks, Hand Sanitizer, Nitrile Gloves		
B18	General Supplies: Notepad, Pens, Rubber Bands		
B19	Heat Illness Prevention Program Card NSN: 7530-18-000-4041		
<b>Order an FBR badge (Timecard)</b>		Initial	Date



## Workflow – Week 1 Tasks

### Welcome New Hire to Unit/Duty Station:

A checklist is available for Supervisors through this task outlining how they can prepare for the New Hire's first day at Unit/Duty Station. Supervisors can download the checklist displayed in the task

HR Onboarding: Jia Saloni

Actions

New Hire: Jia Saloni  
Effective Date: 2021-05-07

Supervisor: NH Supervisor  
Employment Type: Non-Career Employee

HR Rep: NH HR Representative  
Position: City Carrier Assistant 2

Training Rep: NH Training Lead  
Location: 03049-HOLLIS-1367208

Tasks/To-Dos Activity Attachments

Week 1

Welcome New Hire to the Unit/Duty Station  
HRT0004941 Due in 4 days

Attachments History

Ask a Question

Enter New Hire time into TACS (Week 1)  
Due in 4 days

Prepare for Shadow Day with New Hire  
Due in 4 days

Prepare for New Hire's First Day in th...  
Due in 4 days

Schedule Initial Meeting with Superv...  
Due in 4 days

Download

1 of 2

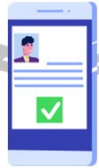
Search

**PART C – First day in unit welcome process – Postmaster / Manager & Union Steward**

	Initial	Date
<b>Make a Great First Impression</b>		
C1 Introduce Supervisors		
C2 Introduce Union Shop Steward		
C3 Introduce Safety Captain		
C4 Reintroduce CUI/POC (if applicable)		
C5 Introduce new hire to coworkers (Stand Up)		
<b>Give a tour of the facility – Postmaster &amp; CUI or Union Steward</b>		
C6 Show the new hire around your unit (if applicable, include the Distribution Area, Hotcase, Accountable cage, Window, PO Box, Supervisor desk, Dispatch Area, Parking)		
C7 Show where the schedule is posted		
C8 Explain the emergency action plan		
C9 Show new hire where is the time clock and how to use it		
C10 Show new hire where to store personal items (assign locker if available)		
C11 Show new hire where Safety huddle board is		
C12 Show new hire where the break room and bathrooms are		
<b>Meeting with Postmaster / Station Manager</b>		
C13 Give new hire welcome intro package (if applicable)		
C14 Discuss PS Form 1750 process (if applicable)		
C15 Review expected milestones within 30, 60 and 90 days		
C16 Encourage new hire to ask questions		
<b>Prepare for CUI Training (if applicable)</b>		

# Project Overview - USPS HR Onboarding Pilot Journey Map

*I accepted my offer am looking forward to receiving information on next steps.*



## PRE-BOARDING

*I am eager to get started; The Orientation Letter confirmed my position, unit, and details of my Orientation. The New Hire site makes everything very straightforward.*

## DAY 1 (OF ORIENTATION)

*I was able to complete the "Welcome to USPS" training without issue. The Orientation team was very helpful and well-coordinated.*



## WEEK 1

*There was lots to do this week, Onboarding Forms, Driver Training, and additional Orientation Training, but so far everything is going very smoothly.*

## 30 DAY

*My Supervisor has provided me with very clear feedback, and I was able to clarify my questions and expectations without issue.*



## WEEK 2

*I'm excited to finally take part in a Shadow Day and On the Job training to learn more about my job.*



## 60 DAY

*I'm glad I had the opportunity to improve since the previous review. My second review went exactly as I expected.*



## 90 DAY

*Finally! My last review went well, and I am a part of the team. The whole process went smoother than I expected.*



## 80 DAY

*I'm glad I had the opportunity to improve since the previous review. My third review went exactly as I expected.*



**NOTE: RCA/ARCs will end System Process at the end of Week 2**

**NOTE: Shadow Days only apply to newly hired city and rural carriers. If the Shadow Day is not applicable to a newly hired employee, you do not need to complete the action in the HR Onboarding Pilot System**

## Workflow – Week 2 Tasks

### Conduct Initial Meeting with New Hire:

Through this task Supervisors confirm they have conducted the initial probationary meeting with the New Hire.

The screenshot displays the 'HR Onboarding: Jia Saloni' interface. At the top, there are four user roles: New Hire (Jia Saloni), Supervisor (NH Supervisor), HR Rep (NH HR Representative), and Training Rep (NH Training Lead). Below this, the 'Tasks/To-Dos' tab is active, showing a list of tasks. The task 'Conduct Initial Meeting With Supervisor' is highlighted with a red box. To the right, a modal window for this task is open, also highlighted with a red box. The modal contains a title bar 'HRT0004957 Conduct Initial Meeting With Supervisor', a certification statement 'I certify that I have conducted an Initial Probationary Review with my New Hire', a dropdown menu with '-- Choose --', and buttons for 'Cancel', 'Save', and 'Submit'.

HR Onboarding: Jia Saloni

Actions

New Hire  
Jia Saloni  
Effective Date  
2021-05-07

Supervisor  
NH Supervisor  
Employment Type  
Non-Career Employee

HR Rep  
NH HR Representative  
Position  
City Carrier Assistant 2

Training Rep  
NH Training Lead  
Location  
03049-HOLLIS-1367208

Tasks/To-Dos Activity Attachments

Week 2

Enter New Hire time into TACS (Week 2)  
Due in 11 days

Conduct Initial Meeting With Supervisor  
Due in 11 days

Schedule 30-day Review  
Due in 11 days

Conduct Initial Meeting With Supervisor  
HRT0004957 Due in 11 days

Attachments History Ask a Question

HRT0004957 Conduct Initial Meeting With Supervisor

I certify that I have conducted an Initial Probationary Review with my New Hire

-- Choose --

Cancel Save Submit

## Workflow – Week 2 Tasks

### Enter Time in TACs:

This task is a reminder for Supervisor's to enter the New Hire's time in the Time and Attendance System (TACs) outside of the HR Onboarding Pilot system.

HR Onboarding: Jia Saloni

Actions

JS

New Hire  
Jia Saloni

Effective Date  
2021-05-07

NS

Supervisor  
NH Supervisor

Employment Type  
Non-Career Employee

NHR

HR Rep  
NH HR Representative

Position  
City Carrier Assistant 2

NTL

Training Rep  
NH Training Lead

Location  
03049-HOLLIS-1367208

Tasks/To-Dos

Activity

Attachments

< Week 2

Enter New Hire time into TACS (Week 2)  
Due in 11 days

Conduct Initial Meeting With Supervi...  
Due in 11 days

Schedule 30-day Review  
Due in 11 days

Enter New Hire time into TACS (Week 2)  
HRT0004934 Due in 11 days

Attachments History

Be sure to enter your New Hire's time into TACS for their first week. If your New Hire completed training, you should have received a copy of their timecard from the Training facilitator.

Enter New Hire time into TACS (Week 2)  
Click on the Complete button to mark task as complete.

Complete

## Workflow – Week 2 Tasks

### Scheduling 30-Day Review:

Supervisors will use this task to schedule the 30-day evaluation for the New Hire.

**NOTE:** There are no additional tasks past this point for Supervisors associated to a RCA/ARC case. The following tasks and activity sets will ONLY be triggered for non-RCA/ARC New Hires.

RCAs/ARCs will be excluded from the scheduling and completion of automated PS Form 1750 evaluations at the 30, 60, and 80-Day reviews. They will continue to be evaluated using the same process used today and their reviews will not be captured within the HR Onboarding Pilot tool.

The screenshot displays the 'HR Onboarding: Jia Saloni' interface. At the top, there are four user roles: New Hire (Jia Saloni), Supervisor (NH Supervisor), HR Rep (NH HR Representative), and Training Rep (NH Training Lead). Below this, the 'Tasks/To-Dos' tab is active, showing a list of tasks. The 'Schedule 30-day Review' task is highlighted with a red box. To the right, the 'Schedule 30-day Review' form is open, also highlighted with a red box. The form includes fields for 'Enter Meeting Time', 'Duration (Enter time in Minutes)' (with a range of 15 - 120), and 'Location'. At the bottom of the form are 'Cancel', 'Save', and 'Submit' buttons.

HR Onboarding: Jia Saloni

Actions

New Hire  
Jia Saloni  
Effective Date  
2021-05-07

Supervisor  
NH Supervisor  
Employment Type  
Non-Career Employee

HR Rep  
NH HR Representative  
Position  
City Carrier Assistant 2

Training Rep  
NH Training Lead  
Location  
03049-HOLLIS-1367208

Tasks/To-Dos Activity Attachments

Week 2

Schedule 30-day Review  
HRT0004958 Due in 11 days

Enter New Hire time into TACS (Week 2)  
Due in 11 days

Conduct Initial Meeting With Supervi...  
Due in 11 days

Schedule 30-day Review  
Due in 11 days

Attachments History

Ask a Question

HRT0004958 Schedule 30-Day Review  
Schedule 30-Day Review

\*Enter Meeting Time:  
[Text Field] [Calendar Icon]

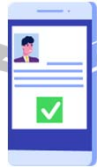
\*Duration (Enter time in Minutes):  
[Text Field] Range: 15 - 120

\*Location:  
[Text Field] [Dropdown Arrow]

Cancel Save Submit

# Project Overview - USPS HR Onboarding Pilot Journey Map

*I accepted my offer and am looking forward to receiving information on next steps.*



## PRE-BOARDING

*I am eager to get started; The Orientation Letter confirmed my position, unit, and details of my Orientation. The New Hire site makes everything very straightforward.*

## DAY 1 (OF ORIENTATION)

*I was able to complete the "Welcome to USPS" training without issue. The Orientation team was very helpful and well-coordinated.*



## WEEK 1

*There was lots to do this week, Onboarding Forms, Driver Training, and additional Orientation Training, but so far everything is going very smoothly.*



## 30 DAY

*My Supervisor has provided me with very clear feedback, and I was able to clarify my questions and expectations without issue.*

## WEEK 2

*I'm excited to finally take part in a Shadow Day and On the Job training to learn more about my job.*



## 60 DAY

*I'm glad I had the opportunity to improve since the previous review. My second review went exactly as I expected.*



## 90 DAY

*Finally! My last review went well, and I am a part of the team. The whole process went smoother than I expected.*



## 80 DAY

*I'm glad I had the opportunity to improve since the previous review. My third review went exactly as I expected.*



**NOTE: RCA/ARCs will end System Process at the end of Week 2**

**NOTE: Shadow Days only apply to newly hired city and rural carriers. If the Shadow Day is not applicable to a newly hired employee, you do not need to complete the action in the HR Onboarding Pilot System**

## Workflow – Day 30 Tasks

### Enter ratings and generate form:

The Supervisor will enter their evaluation of the New Hire's performance in this task. Once the task is completed, a PDF of the Form 1750 is generated using the Supervisor's input values. The generated PDF can be found under the 'Attachments' tab on the HR case page

**NOTE:** RCAs/ARCs will be excluded from the scheduling and completion of automated PS Form 1750 evaluations at the 30, 60, and 80-Day reviews. They will continue to be evaluated using the same process used today and their reviews will not be captured within the HR Onboarding Pilot tool.

HR Onboarding: Jia Saloni

Actions

New Hire  
Jia Saloni  
Effective Date  
2021-05-07

Supervisor  
NH Supervisor  
Employment Type  
Non-Career Employee

HR Rep  
NH HR Representative  
Position  
City Carrier Assistant 2

Training Rep  
NH Training Lead  
Location  
03049-HOLLIS-1367208

Tasks/To-Dos Activity Attachments

Day 30

Enter ratings and generate 30-day review form  
HRT0004937 Overdue 48 days

Conduct 30-Day Review  
Overdue 48 days

Enter ratings and generate 30-day re...  
Overdue 48 days

Schedule 60-day review  
Overdue 48 days

Attachments History

Ask a Question

HRT0004937 30 Day - 1750 Form

\* Pay Location

\* Factor Rating: Work Quantity

Examples of Satisfactory Performance Levels:

Works at a sufficient speed to keep up with the amount of work required by the position.  
Accomplishes tasks in an efficient and timely manner.  
Makes productive use of time when completing assignments.

-- Choose --

\* Factor Rating: Work Quality

Examples of Satisfactory Performance Levels:

Makes few errors or mistakes.  
Performs work which meets the expectations of the position.  
Works in a careful, alert, and conscientious manner to ensure the accuracy and completeness of the work performed.

-- Choose --



## 35

**Populated from the  
New Hire's HR  
Profile**

**NOTE:** RCAs/ARCs will be excluded from the scheduling and completion of automated PS Form 1750 evaluations at the 30, 60, and 80-Day reviews. They will continue to be evaluated using the same process used today and their reviews will not be captured within the HR Onboarding Pilot tool.



## Workflow – Day 30 Tasks

### Conduct Review:

Through this task Supervisors confirm they have conducted the 30-day probationary meeting with the New Hire.

**NOTE:** RCAs/ARCs will be excluded from the scheduling and completion of automated PS Form 1750 evaluations at the 30, 60, and 80-Day reviews. They will continue to be evaluated using the same process used today and their reviews will not be captured within the HR Onboarding Pilot tool.

The screenshot displays the 'HR Onboarding: Jia Saloni' interface. At the top, there are four profile cards: New Hire (Jia Saloni), Supervisor (NH Supervisor), HR Rep (NH HR Representative), and Training Rep (NH Training Lead). Below these are tabs for 'Tasks/To-Dos', 'Activity', and 'Attachments'. The 'Tasks/To-Dos' tab is active, showing a list of tasks. The 'Conduct 30-Day Review' task is highlighted with a red box, indicating it is overdue by 48 days. To the right, a detailed view of this task is shown, also with a red box. It includes the task ID 'HRT0004951', a description of the 30-day review process, a dropdown menu for selection, and radio buttons to confirm if the New Hire signed the review. At the bottom of the task view are 'Cancel', 'Save', and 'Submit' buttons.

HR Onboarding: Jia Saloni

Actions

New Hire  
Jia Saloni  
Effective Date  
2021-05-07

Supervisor  
NH Supervisor  
Employment Type  
Non-Career Employee

HR Rep  
NH HR Representative  
Position  
City Carrier Assistant 2

Training Rep  
NH Training Lead  
Location  
03049-HOLLIS-1367208

Tasks/To-Dos Activity Attachments

< Day 30

Conduct 30-Day Review  
HRT0004951 Overdue 48 days

Attachments History Ask a Question

Conduct 30-Day Review  
Overdue 48 days

Enter ratings and generate 30-day re...  
Overdue 48 days

Schedule 60-day review  
Overdue 48 days

HRT0004951 Conduct 30-Day Review

Conduct the 30-day review with your New Hire. Review the PS form 1750 (probationary form) and discuss the rating that have been provided against all factors on job performance to-date. Obtain acknowledgement from the New Hire or indicate a refusal to sign

-- Choose --

Did this New Hire sign the 30-Day review?

☐ Yes, this New Hire has signed the 30-Day review.

☐ No, this New Hire refused to sign the 30-Day review.

Cancel Save Submit

## Workflow – Day 30 Tasks

### Schedule 60-Day Review:

Supervisors will use this task to schedule the date the 60-day evaluation for the New Hire.

HR Onboarding: Jia Saloni

Actions

JS

New Hire

Jia Saloni

Effective Date

2021-05-07

NS

Supervisor

NH Supervisor

Employment Type

Non-Career Employee

NHR

HR Rep

NH HR Representative

Position

City Carrier Assistant 2

NTL

Training Rep

NH Training Lead

Location

03049-HOLLIS-1367208

Tasks/To-Dos

Activity

Attachments

< Day 30

Conduct 30-Day Review

Overdue 48 days

Enter ratings and generate 30-day re...

Overdue 48 days

Schedule 60-day review

Overdue 48 days

Schedule 60-day review

HRT0004949 Overdue 48 days

Attachments

History

Ask a Question

HRT0004949 Schedule 60-Day Review

Schedule 60-Day Review

\*Enter Meeting Time:

\*Duration (Enter time in Minutes):

Range: 15 - 120

\*Location:

Cancel

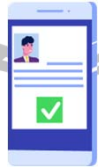
Save

Submit

**NOTE:** RCAs/ARCs will be excluded from the scheduling and completion of automated PS Form 1750 evaluations at the 30, 60, and 80-Day reviews. They will continue to be evaluated using the same process used today and their reviews will not be captured within the HR Onboarding Pilot tool.

# Project Overview - USPS HR Onboarding Pilot Journey Map

*I accepted my offer am looking forward to receiving information on next steps.*



## PRE-BOARDING

*I am eager to get started; The Orientation Letter confirmed my position, unit, and details of my Orientation. The New Hire site makes everything very straightforward.*

## DAY 1 (OF ORIENTATION)

*I was able to complete the "Welcome to USPS" training without issue. The Orientation team was very helpful and well-coordinated.*

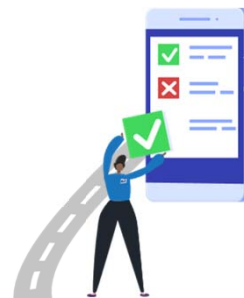


## WEEK 1

*There was lots to do this week, Onboarding Forms, Driver Training, and additional Orientation Training, but so far everything is going very smoothly.*

## 30 DAY

*My Supervisor has provided me with very clear feedback, and I was able to clarify my questions and expectations without issue.*



## WEEK 2

*I'm excited to finally take part in a Shadow Day and On the Job training to learn more about my job.*



## 60 DAY

*I'm glad I had the opportunity to improve since the previous review. My second review went exactly as I expected.*



## 80 DAY

*I'm glad I had the opportunity to improve since the previous review. My third review went exactly as I expected.*



## 90 DAY

*Finally! My last review went well, and I am a part of the team. The whole process went smoother than I expected.*



**NOTE: RCA/ARCs will end System Process at the end of Week 2**

**NOTE: Shadow Days only apply to newly hired city and rural carriers. If the Shadow Day is not applicable to a newly hired employee, you do not need to complete the action in the HR Onboarding Pilot System**

## Workflow – Day 60 Tasks

### Enter ratings and generate form:

The Supervisor will enter their evaluation of the New Hire's performance in this task. Once the task is completed, a PDF of the Form 1750 is generated using the Supervisor's input values. The generated PDF can be found under the 'Attachments' tab on the HR case page

**NOTE:** RCAs/ARCs will be excluded from the scheduling and completion of automated PS Form 1750 evaluations at the 30, 60, and 80-Day reviews. They will continue to be evaluated using the same process used today and their reviews will not be captured within the HR Onboarding Pilot tool.

The screenshot displays the 'HR Onboarding: Jia Saloni' interface. At the top, there are four user roles: New Hire (Jia Saloni), Supervisor (NH Supervisor), HR Rep (NH HR Representative), and Training Rep (NH Training Lead). Below these, the Effective Date (2021-05-07), Employment Type (Non-Career Employee), Position (City Carrier Assistant 2), and Location (03049-HOLLIS-1367208) are listed. The main section is titled 'Tasks/To-Dos' and shows a list of tasks: 'Day 60', 'Schedule 80-Day Review', 'Conduct 60-Day Review', and 'Enter ratings and generate 60-day re...'. The 'Enter ratings and generate 60-day re...' task is highlighted with a red box. To the right of this task, there is a detailed view of the task, including the title 'HRT0004954 60 Day - 1750 Form' and three sections for factor ratings: 'Work Quantity', 'Work Quality', and 'Dependability'. Each section includes 'Examples of Satisfactory Performance Levels' and a dropdown menu for selecting a rating. The entire task detail area is also highlighted with a red box.

HR Onboarding: Jia Saloni

Actions

New Hire: Jia Saloni  
Effective Date: 2021-05-07

Supervisor: NH Supervisor  
Employment Type: Non-Career Employee

HR Rep: NH HR Representative  
Position: City Carrier Assistant 2

Training Rep: NH Training Lead  
Location: 03049-HOLLIS-1367208

Tasks/To-Dos Activity Attachments

Day 60

Enter ratings and generate 60-day review form  
HRT0004954 Overdue 18 days

Schedule 80-Day Review  
Overdue 18 days

Conduct 60-Day Review  
Overdue 18 days

Enter ratings and generate 60-day re...  
Overdue 18 days

Attachments History

Ask a Question

HRT0004954 60 Day - 1750 Form

\* Factor Rating: Work Quantity  
Examples of Satisfactory Performance Levels:  
Works at a sufficient speed to keep up with the amount of work required by the position.  
Accomplishes tasks in an efficient and timely manner.  
Makes productive use of time when completing assignments.  
-- Choose --

\* Factor Rating: Work Quality  
Examples of Satisfactory Performance Levels:  
Makes few errors or mistakes.  
Performs work which meets the expectations of the position.  
Works in a careful, alert, and conscientious manner to ensure the accuracy and completeness of the work performed.  
-- Choose --

\* Factor Rating: Dependability  
Examples of Satisfactory Performance Levels:  
Completes work assignments without unnecessary supervision.

## Workflow – Day 60 Tasks

UNITED STATES POSTAL SERVICE®		Employee Evaluation and/or Probationary Report (See Instructions on Reverse)																	
1. Employee's Name (First, MI, Last) <b>Jia Saloni</b>		2. Employee Social Security Number <b>061359902</b>																	
3. Title <b>City Carrier Assistant 2</b>		4. Pay Location <b>123</b>	5. Appointment Date <b>2021-05-07</b>	6. Date Probationary Period Ends <b>2021-08-05</b>															
7a. Complete 30-Day Report By: <b>2021-06-05</b>	8a. Complete 60-Day Report By: <b>2021-07-05</b>	9a. Complete 80-Day Report By: <b>2021-07-25</b>	10a. Complete Year End Report By: <b>2022-05-06</b>																
7b. Enter Factor Rating (O, S, U, NO)	8b. Enter Factor Rating (O, S, U, NO)	9b. Enter Factor Rating (O, S, U, NO)	10b. Enter Factor Rating (O, S, U, NO)																
A <u>O</u> B <u>O</u> C <u>S</u> D <u>O</u> E <u>S</u> F <u>S</u>	A <u>S</u> B <u>O</u> C <u>S</u> D <u>O</u> E <u>O</u> F <u>O</u>	A <u>A</u> B <u>B</u> C <u>C</u> D <u>D</u> E <u>E</u> F <u>F</u>	A <u>A</u> B <u>B</u> C <u>C</u> D <u>D</u> E <u>E</u> F <u>F</u>																
7c. Employee's Initials	8c. Employee's Initials	9c. Employee's Initials	10c. Employee's Initials																
11. Supervisor's Signature and Date (End of Probationary Period or Year End)			12. Employee's Signature and Date (Does Not Indicate Agreement)																
<p>List below are the factors on which you are to evaluate the employee. Next to each factor are examples of behaviors that would describe performance at the SATISFACTORY level. These are provided as reference points for evaluating performance. Performance substantially above the performance described at the SATISFACTORY level would be rated OUTSTANDING, while performance substantially below the SATISFACTORY level would be rated UNACCEPTABLE. Please indicate your rating of OUTSTANDING, SATISFACTORY, or UNACCEPTABLE for each factor by entering the appropriate letters (O, S, or U) in the boxes in items 7b through 10b. If you have not observed how this person performed on a given factor, or if the factor is not relevant to the position which you are rating, enter "NO" (NOT OBSERVED).</p> <p><b>O = OUTSTANDING    S = SATISFACTORY    U = UNACCEPTABLE    NO = NOT OBSERVED</b></p> <table border="1"> <thead> <tr> <th>Factor</th> <th>Examples of Satisfactory Performance Levels</th> </tr> </thead> <tbody> <tr> <td><b>A. Work Quantity</b></td> <td> <ul style="list-style-type: none"> <li>Works at a sufficient speed to keep up with the amount of work required by the position.</li> <li>Accomplishes tasks in an efficient and timely manner.</li> <li>Makes productive use of time when completing assignments.</li> </ul> </td> </tr> <tr> <td><b>B. 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Work Methods</b></td> <td> <ul style="list-style-type: none"> <li>Handles equipment and/or work materials in an appropriate manner.</li> <li>Consistently observes proper safety rules and practices.</li> <li>Understands and follows oral and/or written instructions.</li> </ul> </td> </tr> <tr> <td><b>F. Personal Conduct</b></td> <td> <ul style="list-style-type: none"> <li>Conducts himself/herself in a manner appropriate to the work setting.</li> <li>Maintains an appropriate appearance for the position.</li> <li>Demonstrates a positive approach toward work, co-workers, and supervisors.</li> <li>Demonstrates a willingness to handle all assignments.</li> <li>Demonstrates flexibility in moving from one task to another as needed.</li> </ul> </td> </tr> </tbody> </table> <p>Have Expectations Been Jointly Discussed?  <input checked="" type="checkbox"/> Yes    <input type="checkbox"/> No    Initials: _____ (Supervisor)    _____ (Employee)</p> <p>Would You Recommend This Person for Retention or Rehire?  <input checked="" type="checkbox"/> Yes    <input type="checkbox"/> No    Initials: _____ (Supervisor)</p> <p>Please Explain or Provide Additional Comments Below:</p> <p>PS Form 1750, August 1994    <b>1 - Forward to Designated Postal Official</b></p>						Factor	Examples of Satisfactory Performance Levels	<b>A. 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Populated from the  
Enter Ratings  
Task

Populated from the  
New Hire's HR  
Profile

**NOTE:** RCAs/ARCs will be excluded from the scheduling and completion of automated PS Form 1750 evaluations at the 30, 60, and 80-Day reviews. They will continue to be evaluated using the same process used today and their reviews will not be captured within the HR Onboarding Pilot tool.

## Workflow – Day 60 Tasks

### Conduct Review:

Through this task Supervisors confirm they have conducted the 60-day probationary meeting with the New Hire.

**NOTE:** RCAs/ARCs will be excluded from the scheduling and completion of automated PS Form 1750 evaluations at the 30, 60, and 80-Day reviews. They will continue to be evaluated using the same process used today and their reviews will not be captured within the HR Onboarding Pilot tool.

The screenshot displays the 'HR Onboarding: Jia Saloni' interface. At the top, there are four user roles: JS New Hire Jia Saloni, NS Supervisor NH Supervisor, HR Rep NH HR Representative, and NTL Training Rep NH Training Lead. Below this, the 'Effective Date' is 2021-05-07, 'Employment Type' is Non-Career Employee, 'Position' is City Carrier Assistant 2, and 'Location' is 03049-HOLLIS-1367208. The main section is titled 'Tasks/To-Dos' and lists three tasks: 'Day 60', 'Schedule 80-Day Review' (Overdue 18 days), and 'Conduct 60-Day Review' (Overdue 18 days). The 'Conduct 60-Day Review' task is highlighted with a red box. To the right, a detailed view of the 'Conduct 60-Day Review' task is shown, including a title bar 'HRT0004953 Conduct 60-Day Review', instructions to review the PS form 1750, a dropdown menu for selection, and radio buttons to confirm if the New Hire signed the review. The 'Submit' button is highlighted with a red box.

HR Onboarding: Jia Saloni

JS New Hire Jia Saloni  
Effective Date 2021-05-07

NS Supervisor NH Supervisor  
Employment Type Non-Career Employee

HR Rep NH HR Representative  
Position City Carrier Assistant 2

NTL Training Rep NH Training Lead  
Location 03049-HOLLIS-1367208

Tasks/To-Dos Activity Attachments

< Day 60

Schedule 80-Day Review  
Overdue 18 days

Conduct 60-Day Review  
Overdue 18 days

Enter ratings and generate 60-day re...  
Overdue 18 days

Conduct 60-Day Review  
HRT0004953 Overdue 18 days

Attachments History

Ask a Question

HRT0004953 Conduct 60-Day Review

Conduct the 60-day review with your New Hire. Review the PS form 1750 (probationary form) and discuss the rating that have been provided against all factors on job performance to-date. Obtain acknowledgement from the New Hire or indicate a refusal to sign

-- Choose --

Did this New Hire sign the 60-Day review?

☐ Yes, this New Hire has signed the 60-Day review.

☐ No, this New Hire refused to sign the 60-Day review.

Cancel Save Submit

## Workflow – Day 60 Tasks

### Schedule 80-Day Review:

Supervisors will use this task to schedule the date the 80-day evaluation for the New Hire.

**NOTE:** RCAs/ARCs will be excluded from the scheduling and completion of automated PS Form 1750 evaluations at the 30, 60, and 80-Day reviews. They will continue to be evaluated using the same process used today and their reviews will not be captured within the HR Onboarding Pilot tool.

HR Onboarding: Jia Saloni

Actions

New Hire: Jia Saloni  
Effective Date: 2021-05-07

Supervisor: NH Supervisor  
Employment Type: Non-Career Employee

HR Rep: NH HR Representative  
Position: City Carrier Assistant 2

Training Rep: NH Training Lead  
Location: 03049-HOLLIS-1367208

Tasks/To-Dos Activity Attachments

< Day 60

Schedule 80-Day Review  
HRT0004936 Overdue 18 days

Conduct 60-Day Review  
Overdue 18 days

Enter ratings and generate 60-day re...  
Overdue 18 days

Attachments History

Ask a Question

HRT0004936 Schedule 80-Day Review  
Schedule 80-Day Review

\* Enter Meeting Time:

\* Duration (Enter time in Minutes):  
 Range: 15 - 120

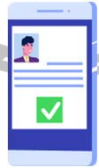
\* Location:

Cancel Save Submit



# Project Overview - USPS HR Onboarding Pilot Journey Map

*I accepted my offer am looking forward to receiving information on next steps.*



## PRE-BOARDING

*I am eager to get started; The Orientation Letter confirmed my position, unit, and details of my Orientation. The New Hire site makes everything very straightforward.*

## DAY 1 (OF ORIENTATION)

*I was able to complete the "Welcome to USPS" training without issue. The Orientation team was very helpful and well-coordinated.*



## WEEK 1

*There was lots to do this week, Onboarding Forms, Driver Training, and additional Orientation Training, but so far everything is going very smoothly.*

## 30 DAY

*My Supervisor has provided me with very clear feedback, and I was able to clarify my questions and expectations without issue.*



## WEEK 2

*I'm excited to finally take part in a Shadow Day and On the Job training to learn more about my job.*



## 60 DAY

*I'm glad I had the opportunity to improve since the previous review. My second review went exactly as I expected.*



## 90 DAY

*Finally! My last review went well, and I am a part of the team. The whole process went smoother than I expected.*



## 80 DAY

*I'm glad I had the opportunity to improve since the previous review. My third review went exactly as I expected.*



**NOTE: RCA/ARCs will end System Process at the end of Week 2**

**NOTE: Shadow Days only apply to newly hired city and rural carriers. If the Shadow Day is not applicable to a newly hired employee, you do not need to complete the action in the HR Onboarding Pilot System**



## Workflow – Day 80 Tasks

### Enter ratings and generate form:

The Supervisor will enter their evaluation of the New Hire's performance in this task. Once the task is completed, a PDF of the Form 1750 is generated using the Supervisor's input values. The generated PDF can be found under the 'Attachments' tab on the HR case page.

**NOTE:** RCAs/ARCs will be excluded from the scheduling and completion of automated PS Form 1750 evaluations at the 30, 60, and 80-Day reviews. They will continue to be evaluated using the same process used today and their reviews will not be captured within the HR Onboarding Pilot tool.

The screenshot displays the 'HR Onboarding: Jia Saloni' interface. At the top, there are four user roles: New Hire (Jia Saloni), Supervisor (NH Supervisor), HR Rep (NH HR Representative), and Training Rep (NH Training Lead). Below this, the 'Tasks/To-Dos' tab is active, showing a list of tasks. The task 'Enter ratings and generate 80-day review form' (HRT0004971) is highlighted with a red box. To the right, the 'Attachments' tab is also visible, showing the generated '80 Day - 1750 Form' (HRT0004971). The form content includes sections for 'Factor Rating A: Work Quantity', 'Factor Rating: Work Quality', and 'Factor Rating: Dependability', each with 'Examples of Satisfactory Performance Levels' and a dropdown menu to select a rating.

HR Onboarding: Jia Saloni

Actions

New Hire: Jia Saloni  
Effective Date: 2021-05-07

Supervisor: NH Supervisor  
Employment Type: Non-Career Employee

HR Rep: NH HR Representative  
Position: City Carrier Assistant 2

Training Rep: NH Training Lead  
Location: 03049-HOLLIS-1367208

Tasks/To-Dos Activity Attachments

Day 80

Conduct 80-Day Review  
Due in 2 days

Enter ratings and generate 80-day review form  
HRT0004971 Due in 2 days

Attachments History

Ask a Question

HRT0004971 80 Day - 1750 Form

\* Factor Rating A: Work Quantity  
Examples of Satisfactory Performance Levels:  
Works at a sufficient speed to keep up with the amount of work required by the position.  
Accomplishes tasks in an efficient and timely manner.  
Makes productive use of time when completing assignments.  
-- Choose --

\* Factor Rating: Work Quality  
Examples of Satisfactory Performance Levels:  
Makes few errors or mistakes.  
Performs work which meets the expectations of the position.  
Works in a careful, alert, and conscientious manner to ensure the accuracy and completeness of the work performed.  
-- Choose --

\* Factor Rating: Dependability  
Examples of Satisfactory Performance Levels:  
Completes work assignments without unnecessary supervision.

## 45

Populated from the  
Enter Ratings  
Task

**Populated from the  
New Hire's HR  
Profile**

**NOTE:** RCAs/ARCs will be excluded from the scheduling and completion of automated PS Form 1750 evaluations at the 30, 60, and 80-Day reviews. They will continue to be evaluated using the same process used today and their reviews will not be captured within the HR Onboarding Pilot tool.

## Workflow – Day 80 Tasks

### Conduct Review:

Through this task Supervisors confirm they have conducted the 80-day probationary meeting with the New Hire.

**NOTE:** RCAs/ARCs will be excluded from the scheduling and completion of automated PS Form 1750 evaluations at the 30, 60, and 80-Day reviews. They will continue to be evaluated using the same process used today and their reviews will not be captured within the HR Onboarding Pilot tool.

HR Onboarding: Jia Saloni

Actions

New Hire: Jia Saloni  
Effective Date: 2021-05-07

Supervisor: NH Supervisor  
Employment Type: Non-Career Employee

HR Rep: NH HR Representative  
Position: City Carrier Assistant 2

Training Rep: NH Training Lead  
Location: 03049-HOLLIS-1367208

Tasks/To-Dos Activity Attachments

Day 80

Conduct 80-Day Review  
Due in 2 days

Enter ratings and generate 80-day re...  
Due in 2 days

Conduct 80-Day Review  
HRT0004932 Due in 2 days

Attachments History Ask a Question

HRT0004932 Conduct 80-Day Review  
Conduct 80-Day Review

Conduct the 80-day review with your New Hire. Review the PS form 1750 (probationary form) and discuss the rating that have been provided against all factors on job performance to-date. Obtain acknowledgement from the New Hire or indicate a refusal to sign

-- Choose --

Did this New Hire sign the 80-Day review?

☐ Yes, this New Hire has signed the 80-Day review.

☐ No, this New Hire refused to sign the 80-Day review.

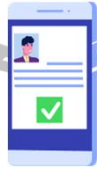
Cancel Save Submit

# Module 4

Workflow - Trainer Tasks

# Project Overview - USPS HR Onboarding Pilot Journey Map

*I accepted my offer am looking forward to receiving information on next steps.*



## PRE-BOARDING

*I am eager to get started; The Orientation Letter confirmed my position, unit, and details of my Orientation. The New Hire site makes everything very straightforward.*

## DAY 1 (OF ORIENTATION)

*I was able to complete the "Welcome to USPS" training without issue. The Orientation team was very helpful and well-coordinated.*



## WEEK 1

*There was lots to do this week, Onboarding Forms, Driver Training, and additional Orientation Training, but so far everything is going very smoothly.*

## 30 DAY

*My Supervisor has provided me with very clear feedback, and I was able to clarify my questions and expectations without issue.*



## WEEK 2

*I'm excited to finally take part in a Shadow Day and On the Job training to learn more about my job.*



## 60 DAY

*I'm glad I had the opportunity to improve since the previous review. My second review went exactly as I expected.*



## 90 DAY

*Finally! My last review went well, and I am a part of the team. The whole process went smoother than I expected.*



## 80 DAY

*I'm glad I had the opportunity to improve since the previous review. My third review went exactly as I expected.*



**NOTE: RCA/ARCs will end System Process at the end of Week 2**

**NOTE: Shadow Days only apply to newly hired city and rural carriers. If the Shadow Day is not applicable to a newly hired employee, you do not need to complete the action in the HR Onboarding Pilot System**

## Workflow – Pre-Boarding Tasks

### Schedule New Hire for Welcome to USPS Orientation (if applicable):

Trainers will use this task to schedule the date a New Hire has their Welcome to USPS Orientation.

HR Onboarding: Alleda Akhtar

Actions

AA New Hire  
Alleda Akhtar  
Effective Date  
2021-09-18

SS Supervisor  
SC Supervisor  
Employment Type  
Non-Career Employee

SHR HR Rep  
SC HR Representative  
Position  
City Carrier Assistant 1

STL Training Rep  
SC Training Lead  
Location  
29009-BETHUNE-1354843

Tasks/To-Dos Activity Attachments

Pre-Boarding

Schedule Safe Driver Program  
Overdue 4 days

Schedule Welcome to the USPS Train...  
Overdue 4 days

Schedule City Carrier On-the-Job Trai...  
Overdue 4 days

Schedule City Carrier Academy  
Overdue 4 days

Schedule Welcome to the USPS Training  
HRT0003983 Overdue 4 days

Attachments History

Ask a Question

HRT0003983 Schedule Welcome to the USPS Training

Choose Existing Training Session

To schedule this new hire's Welcome to USPS Orientation, you can select an upcoming session, or you can schedule a new session:

Cancel Save Submit

## Workflow – Pre-Boarding Tasks

### Schedule New Hire \_\_\_\_ Training:

Trainers will use this task to schedule the New Hire for their various training(s).

The screenshot displays the 'HR Onboarding: Alleda Akhtar' interface. At the top, there are four user roles: New Hire (Alleda Akhtar), Supervisor (SC Supervisor), HR Rep (SC HR Representative), and Training Rep (SC Training Lead). Below these, key information is listed: Effective Date (2021-09-18), Employment Type (Non-Career Employee), Position (City Carrier Assistant 1), and Location (29009-BETHUNE-1354843). The main section is divided into 'Tasks/To-Dos', 'Activity', and 'Attachments'. Under 'Tasks/To-Dos', a list of tasks is shown, with 'Schedule City Carrier Academy' (HRT0003981, Overdue 10 days) highlighted with a red box. To the right, a modal window for 'HRT0003981 Schedule City Carrier Academy' is open, also outlined in red. This modal contains the heading 'Choose Existing Training Session', a brief instruction, a dropdown menu for selecting a session, and 'Cancel', 'Save', and 'Submit' buttons.

HR Onboarding: Alleda Akhtar

Actions ▾

AA New Hire  
Alleda Akhtar

SS Supervisor  
SC Supervisor

SHR HR Rep  
SC HR Representative

STL Training Rep  
SC Training Lead

Effective Date  
2021-09-18

Employment Type  
Non-Career Employee

Position  
City Carrier Assistant 1

Location  
29009-BETHUNE-1354843

Tasks/To-Dos Activity Attachments

← Pre-Boarding

Schedule City Carrier Academy  
HRT0003981 Overdue 10 days

Attachments History Ask a Question

Schedule Safe Driver Program  
Overdue 10 days

Schedule Welcome to the USPS Train...  
Overdue 10 days

Schedule City Carrier On-the-Job Trai...  
Overdue 10 days

Schedule City Carrier Academy  
Overdue 10 days

HRT0003981 Schedule City Carrier Academy

Choose Existing Training Session

To schedule this new hire's City Carrier Academy, you can select an upcoming session, or you can schedule a new session:

Cancel Save Submit

**NOTE:** Depending on the New Hire's occupation code and training plan, this may include more than one task.



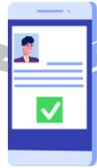
# Project Overview - USPS HR Onboarding Pilot Journey Map

*I accepted my offer am looking forward to receiving information on next steps.*



## PRE-BOARDING

*I am eager to get started; The Orientation Letter confirmed my position, unit, and details of my Orientation. The New Hire site makes everything very straightforward.*



## DAY 1 (OF ORIENTATION)

*I was able to complete the "Welcome to USPS" training without issue. The Orientation team was very helpful and well-coordinated.*



## WEEK 1

*There was lots to do this week, Onboarding Forms, Driver Training, and additional Orientation Training, but so far everything is going very smoothly.*

## 30 DAY

*My Supervisor has provided me with very clear feedback, and I was able to clarify my questions and expectations without issue.*



## WEEK 2

*I'm excited to finally take part in a Shadow Day and On the Job training to learn more about my job.*



## 60 DAY

*I'm glad I had the opportunity to improve since the previous review. My second review went exactly as I expected.*



## 90 DAY

*Finally! My last review went well, and I am a part of the team. The whole process went smoother than I expected.*



## 80 DAY

*I'm glad I had the opportunity to improve since the previous review. My third review went exactly as I expected.*



**NOTE: RCA/ARCs will end System Process at the end of Week 2**

**NOTE: Shadow Days only apply to newly hired city and rural carriers. If the Shadow Day is not applicable to a newly hired employee, you do not need to complete the action in the HR Onboarding Pilot System**



## Workflow – Week 1 Tasks

### Mark Attendance for Welcome to USPS Orientation (if applicable):

This task will allow the Trainer to capture attendance and hours of attendance for the New Hire's Welcome to USPS Orientation.

HR Onboarding: Alleda Akhtar

AA New Hire Alleda Akhtar  
Effective Date: 2021-09-18

SS Supervisor SC Supervisor  
Employment Type: Non-Career Employee

SHR HR Rep SC HR Representative  
Position: City Carrier Assistant 1

STL Training Rep SC Training Lead  
Location: 29009-BETHUNE-1354843

Tasks/To-Dos Activity Attachments

< Week 1

Mark Attendance for Welcome to the ...  
Overdue 3 days

Mark Attendance for Safe Driver Prog...  
Overdue 3 days

Mark Attendance for Welcome to the USPS Training  
HRT0003971 Overdue 3 days

Attachments History Ask a Question

HRT0003971 Mark Attendance for Training

Number of Hours Attended

Employee's Completion Status  
-- Choose --

Notes

Cancel Save Submit

**NOTE:** Depending on the New Hire's occupation code and training plan, this may include more than one task.

## Workflow – Week 1 Tasks

### Mark Attendance for \_\_\_\_ Training:

This task will allow the Trainer to capture attendance and hours of attendance for the New Hire's various training(s).

HR Onboarding: Alleda Akhtar

AA New Hire  
Alleda Akhtar  
Effective Date  
2021-09-18

SS Supervisor  
SC Supervisor  
Employment Type  
Non-Career Employee

SHR HR Rep  
SC HR Representative  
Position  
City Carrier Assistant 1

STL Training Rep  
SC Training Lead  
Location  
29009-BETHUNE-1354843

Tasks/To-Dos Activity Attachments

< Week 1

Mark Attendance for Welcome to the ...  
Overdue 3 days

Mark Attendance for Safe Driver Prog...  
Overdue 3 days

Mark Attendance for Safe Driver Program  
HRT0003975 Overdue 3 days

Attachments History Ask a Question

HRT0003975 Mark Attendance for Safe Driver Program

Number of Hours Attended

Employee's Completion Status  
-- Choose --

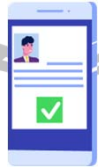
Notes

Cancel Save Submit

**NOTE:** Depending on the New Hire's occupation code and training plan, this may include more than one task.

# Project Overview - USPS HR Onboarding Pilot Journey Map

*I accepted my offer am looking forward to receiving information on next steps.*



## PRE-BOARDING

*I am eager to get started; The Orientation Letter confirmed my position, unit, and details of my Orientation. The New Hire site makes everything very straightforward.*

## DAY 1 (OF ORIENTATION)

*I was able to complete the "Welcome to USPS" training without issue. The Orientation team was very helpful and well-coordinated.*



## WEEK 1

*There was lots to do this week, Onboarding Forms, Driver Training, and additional Orientation Training, but so far everything is going very smoothly.*

## 30 DAY

*My Supervisor has provided me with very clear feedback, and I was able to clarify my questions and expectations without issue.*



## WEEK 2

*I'm excited to finally take part in a Shadow Day and On the Job training to learn more about my job.*



## 60 DAY

*I'm glad I had the opportunity to improve since the previous review. My second review went exactly as I expected.*



## 90 DAY

*Finally! My last review went well, and I am a part of the team. The whole process went smoother than I expected.*



## 80 DAY

*I'm glad I had the opportunity to improve since the previous review. My third review went exactly as I expected.*



**NOTE: RCA/ARCs will end System Process at the end of Week 2**

**NOTE: Shadow Days only apply to newly hired city and rural carriers. If the Shadow Day is not applicable to a newly hired employee, you do not need to complete the action in the HR Onboarding Pilot System**

## Workflow – Week 2 Tasks

### Mark Attendance for \_\_\_\_ Training:

This task will allow the Trainer to capture attendance and hours of attendance for the New Hire's various training(s).

HR Onboarding: Alleda Akhtar

AA New Hire  
Alleda Akhtar  
Effective Date  
2021-09-18

SS Supervisor  
SC Supervisor  
Employment Type  
Non-Career Employee

SHR HR Rep  
SC HR Representative  
Position  
City Carrier Assistant 1

STL Training Rep  
SC Training Lead  
Location  
29009-BETHUNE-1354843

Tasks/To-Dos Activity Attachments

Week 2

Mark Attendance for City Carrier Academy  
HRT0003988 Due in 4 days

Mark Attendance for City Carrier On-t...  
Due in 4 days

HRT0003988 Mark Attendance for City Carrier Academy

Number of Hours Attended

Employee's Completion Status

Notes

Cancel Save Submit

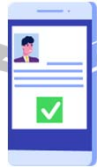
**NOTE:** Depending on the New Hire's occupation code and training plan, this may include more than one task.

# Module 5

Workflow - HR Representative Tasks

# Project Overview - USPS HR Onboarding Pilot Journey Map

*I accepted my offer am looking forward to receiving information on next steps.*



## PRE-BOARDING

*I am eager to get started; The Orientation Letter confirmed my position, unit, and details of my Orientation. The New Hire site makes everything very straightforward.*

## DAY 1 (OF ORIENTATION)

*I was able to complete the "Welcome to USPS" training without issue. The Orientation team was very helpful and well-coordinated.*



## WEEK 1

*There was lots to do this week, Onboarding Forms, Driver Training, and additional Orientation Training, but so far everything is going very smoothly.*

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*My Supervisor has provided me with very clear feedback, and I was able to clarify my questions and expectations without issue.*



## WEEK 2

*I'm excited to finally take part in a Shadow Day and On the Job training to learn more about my job.*



## 60 DAY

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## 90 DAY

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## 80 DAY

*I'm glad I had the opportunity to improve since the previous review. My third review went exactly as I expected.*



**NOTE: RCA/ARCs will end System Process at the end of Week 2**

**NOTE: Shadow Days only apply to newly hired city and rural carriers. If the Shadow Day is not applicable to a newly hired employee, you do not need to complete the action in the HR Onboarding Pilot System**

## Workflow – Pre-Boarding Tasks

### Send New Hire travel/booking information:

HR Representatives will use this task as a reminder to verify if the new hire will need to drive more than 50 miles to orientation training and if necessary, arrange accommodations.

HR Onboarding: Jia Saloni

Actions

JS

New Hire  
Jia Saloni

Effective Date  
2021-05-07

NS

Supervisor  
NH Supervisor

Employment Type  
Non-Career Employee

NHR

HR Rep  
NH HR Representative

Position  
City Carrier Assistant 2

NTL

Training Rep  
NH Training Lead

Location  
03049-HOLLIS-1367208

Tasks/To-Dos

Activity

Attachments

< Pre-Boarding

Send New Hire Travel & Booking info...

Overdue 4 days

Send New Hire Travel & Booking information if required

HRT0004964 Overdue 4 days

Attachments History

Ask a Question

If the New Hire needs to drive more than 50 miles to their Orientation Training, they may require accommodations. Coordinate with the New Hire to arrange accommodations, then send the New Hire their Travel & Booking Information for Orientation. You can mark as complete if no accommodations are needed or when the New Hire has been sent their travel & booking confirmation.

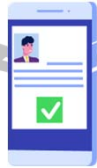
Send New Hire Travel & Booking information if required

Click on the Complete button to mark task as complete.

Complete

# Project Overview - USPS HR Onboarding Pilot Journey Map

*I accepted my offer am looking forward to receiving information on next steps.*



## PRE-BOARDING

*I am eager to get started; The Orientation Letter confirmed my position, unit, and details of my Orientation. The New Hire site makes everything very straightforward.*

## DAY 1 (OF ORIENTATION)

*I was able to complete the "Welcome to USPS" training without issue. The Orientation team was very helpful and well-coordinated.*

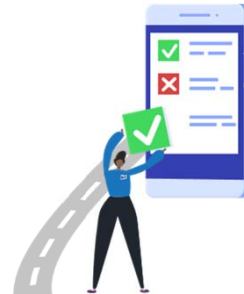


## WEEK 1

*There was lots to do this week, Onboarding Forms, Driver Training, and additional Orientation Training, but so far everything is going very smoothly.*

## 30 DAY

*My Supervisor has provided me with very clear feedback, and I was able to clarify my questions and expectations without issue.*



## WEEK 2

*I'm excited to finally take part in a Shadow Day and On the Job training to learn more about my job.*



## 60 DAY

*I'm glad I had the opportunity to improve since the previous review. My second review went exactly as I expected.*



## 90 DAY

*Finally! My last review went well, and I am a part of the team. The whole process went smoother than I expected.*



## 80 DAY

*I'm glad I had the opportunity to improve since the previous review. My third review went exactly as I expected.*



**NOTE: RCA/ARCs will end System Process at the end of Week 2**

**NOTE: Shadow Days only apply to newly hired city and rural carriers. If the Shadow Day is not applicable to a newly hired employee, you do not need to complete the action in the HR Onboarding Pilot System**



## Workflow – Week 1 Tasks

### Determine if New Hire should be removed from rolls:

HR Representatives will use this task as a reminder to verify the continued employment of the New Hire and take any “outside-the-system” actions necessary if the New Hire separates from USPS.

HR Onboarding: Jia Saloni

Actions

JS

New Hire  
Jia Saloni

Effective Date  
2021-05-07

NS

Supervisor  
NH Supervisor

Employment Type  
Non-Career Employee

NHR

HR Rep  
NH HR Representative

Position  
City Carrier Assistant 2

NTL

Training Rep  
NH Training Lead

Location  
03049-HOLLIS-1367208

Tasks/To-Dos

Activity

Attachments

< Week 1

Determine if New Hire should be rem...

Due in 3 days

Determine if New Hire should be removed from rolls

HRT0004947 Due in 3 days

Attachments History

Ask a Question

This New Hire did not report for the first Day of Orientation and did not have an excused absence. Determine if the New Hire should be removed from the rolls. Note: Managers and Supervisors must inform the Human Resources Shared Service Center (HRSSC) about any direct reports who are separating (voluntarily or involuntarily). Instructions for processing separations can be found at <https://blue.usps.gov/hr/hrssc-info/separations/> and must be initiated and completed outside of this system. It is critical this process is handled correctly and timely therefore, the submission of separation documentation for processing should be handled immediately upon receipt, regardless of effective date. Once a separation has been initiated, select "Close Case due to Separation" from the Action menu above to close the New Hire's Onboarding Case.

Determine if New Hire should be removed from rolls

Click on the Complete button to mark task as complete.

Complete

# Project Overview - USPS HR Onboarding Pilot Journey Map

*I accepted my offer am looking forward to receiving information on next steps.*



## DAY 1 (OF ORIENTATION)

*I was able to complete the "Welcome to USPS" training without issue. The Orientation team was very helpful and well-coordinated.*

## WEEK 2

*I'm excited to finally take part in a Shadow Day and On the Job training to learn more about my job.*

**NOTE: RCA/ARCs will end System Process at the end of Week 2**

## PRE-BOARDING

*I am eager to get started; The Orientation Letter confirmed my position, unit, and details of my Orientation. The New Hire site makes everything very straightforward.*

## WEEK 1

*There was lots to do this week, Onboarding Forms, Driver Training, and additional Orientation Training, but so far everything is going very smoothly.*

## 30 DAY

*My Supervisor has provided me with very clear feedback, and I was able to clarify my questions and expectations without issue.*

## 60 DAY

*I'm glad I had the opportunity to improve since the previous review. My second review went exactly as I expected.*

## 90 DAY

*Finally! My last review went well, and I am a part of the team. The whole process went smoother than I expected.*

## 80 DAY

*I'm glad I had the opportunity to improve since the previous review. My third review went exactly as I expected.*

**NOTE: Shadow Days only apply to newly hired city and rural carriers. If the Shadow Day is not applicable to a newly hired employee, you do not need to complete the action in the HR Onboarding Pilot System**

## Workflow – Day 30 Tasks

### Determine if New Hire should be removed from rolls:

HR Representatives will use this task as a reminder to verify the continued employment of the New Hire and take any “outside-the-system” actions necessary if the New Hire separates from USPS.

**NOTE:** RCAs/ARCs will be excluded from the scheduling and completion of automated PS Form 1750 evaluations at the 30, 60, and 80-Day reviews. They will continue to be evaluated using the same process used today and their reviews will not be captured within the HR Onboarding Pilot tool.

HR Onboarding: Jia Saloni

Actions

JS

New Hire  
Jia Saloni

Effective Date  
2021-05-07

NS

Supervisor  
NH Supervisor

Employment Type  
Non-Career Employee

NHR

HR Rep  
NH HR Representative

Position  
City Carrier Assistant 2

NTL

Training Rep  
NH Training Lead

Location  
03049-HOLLIS-1367208

Tasks/To-Dos

Activity

Attachments

< Day 30

Determine if New Hire should be rem...

Overdue 49 days

Determine if New Hire should be removed from rolls

HRT0004948 Overdue 49 days

Attachments History

Ask a Question

This New Hire was not recommended for Retention during their 30-day review. Determine if the New Hire should be removed from the rolls.

**Note:** Managers and Supervisors must inform the Human Resources Shared Service Center (HRSSC) about any direct reports who are separating (voluntarily or involuntarily). Instructions for processing separations can be found at <https://blue.usps.gov/hr/hrssc-info/separations/> and must be initiated and completed outside of this system. It is critical this process is handled correctly and timely therefore, the submission of separation documentation for processing should be handled immediately upon receipt, regardless of effective date.

Once a separation has been initiated, select "Close Case due to Separation" from the Action menu above to close the New Hire's Onboarding Case.

Determine if New Hire should be removed from rolls

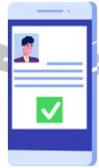
Click on the Complete button to mark task as complete.

Complete

62

# Project Overview - USPS HR Onboarding Pilot Journey Map

*I accepted my offer am looking forward to receiving information on next steps.*



## PRE-BOARDING

*I am eager to get started; The Orientation Letter confirmed my position, unit, and details of my Orientation. The New Hire site makes everything very straightforward.*

## DAY 1 (OF ORIENTATION)

*I was able to complete the "Welcome to USPS" training without issue. The Orientation team was very helpful and well-coordinated.*

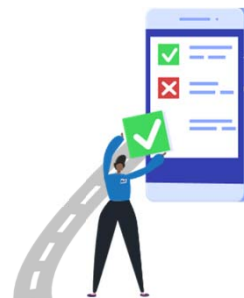


## WEEK 1

*There was lots to do this week, Onboarding Forms, Driver Training, and additional Orientation Training, but so far everything is going very smoothly.*

## 30 DAY

*My Supervisor has provided me with very clear feedback, and I was able to clarify my questions and expectations without issue.*



## WEEK 2

*I'm excited to finally take part in a Shadow Day and On the Job training to learn more about my job.*



## 60 DAY

*I'm glad I had the opportunity to improve since the previous review. My second review went exactly as I expected.*



## 80 DAY

*I'm glad I had the opportunity to improve since the previous review. My third review went exactly as I expected.*



## 90 DAY

*Finally! My last review went well, and I am a part of the team. The whole process went smoother than I expected.*



**NOTE: RCA/ARCs will end System Process at the end of Week 2**

**NOTE: Shadow Days only apply to newly hired city and rural carriers. If the Shadow Day is not applicable to a newly hired employee, you do not need to complete the action in the HR Onboarding Pilot System**

## Workflow – Day 60 Tasks

### Determine if New Hire should be removed from rolls:

HR Representatives will use this task as a reminder to verify the continued employment of the New Hire and take any “outside-the-system” actions necessary if the New Hire separates from USPS.

**NOTE:** RCAs/ARCs will be excluded from the scheduling and completion of automated PS Form 1750 evaluations at the 30, 60, and 80-Day reviews. They will continue to be evaluated using the same process used today and their reviews will not be captured within the HR Onboarding Pilot tool.

HR Onboarding: Jia Saloni

Actions

JS

New Hire  
Jia Saloni

Effective Date  
2021-05-07

NS

Supervisor  
NH Supervisor

Employment Type  
Non-Career Employee

NHR

HR Rep  
NH HR Representative

Position  
City Carrier Assistant 2

NTL

Training Rep  
NH Training Lead

Location  
03049-HOLLIS-1367208

Tasks/To-Dos

Activity

Attachments

< Day 60

Determine if New Hire should be removed from rolls

Overdue 19 days

Attachments

History

Ask a Question

This New Hire was not recommended for Retention during their 60-day review. Determine if the New Hire should be removed from the rolls.

**Note:** Managers and Supervisors must inform the Human Resources Shared Service Center (HRSSC) about any direct reports who are separating (voluntarily or involuntarily). Instructions for processing separations can be found at <https://blue.usps.gov/hr/hrssc-info/separations/> and must be initiated and completed outside of this system. It is critical this process is handled correctly and timely therefore, the submission of separation documentation for processing should be handled immediately upon receipt, regardless of effective date.

Once a separation has been initiated, select "Close Case due to Separation" from the Action menu above to close the New Hire's Onboarding Case.

Determine if New Hire should be removed from rolls

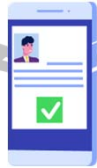
Click on the Complete button to mark task as complete.

Complete



# Project Overview - USPS HR Onboarding Pilot Journey Map

*I accepted my offer am looking forward to receiving information on next steps.*



## PRE-BOARDING

*I am eager to get started; The Orientation Letter confirmed my position, unit, and details of my Orientation. The New Hire site makes everything very straightforward.*

## DAY 1 (OF ORIENTATION)

*I was able to complete the "Welcome to USPS" training without issue. The Orientation team was very helpful and well-coordinated.*



## WEEK 1

*There was lots to do this week, Onboarding Forms, Driver Training, and additional Orientation Training, but so far everything is going very smoothly.*

## 30 DAY

*My Supervisor has provided me with very clear feedback, and I was able to clarify my questions and expectations without issue.*



## WEEK 2

*I'm excited to finally take part in a Shadow Day and On the Job training to learn more about my job.*



## 60 DAY

*I'm glad I had the opportunity to improve since the previous review. My second review went exactly as I expected.*



## 90 DAY

*Finally! My last review went well, and I am a part of the team. The whole process went smoother than I expected.*



## 80 DAY

*I'm glad I had the opportunity to improve since the previous review. My third review went exactly as I expected.*



**NOTE: RCA/ARCs will end System Process at the end of Week 2**

**NOTE: Shadow Days only apply to newly hired city and rural carriers. If the Shadow Day is not applicable to a newly hired employee, you do not need to complete the action in the HR Onboarding Pilot System**

## Workflow – Day 80 Tasks

### Determine if New Hire should be removed from rolls:

HR Representatives will use this task as a reminder to verify the continued employment of the New Hire and take any “outside-the-system” actions necessary if the New Hire separates from USPS.

**NOTE:** RCAs/ARCs will be excluded from the scheduling and completion of automated PS Form 1750 evaluations at the 30, 60, and 80-Day reviews. They will continue to be evaluated using the same process used today and their reviews will not be captured within the HR Onboarding Pilot tool.

HR Onboarding: Jia Saloni

Actions

JS

New Hire  
Jia Saloni

Effective Date  
2021-05-07

NS

Supervisor  
NH Supervisor

Employment Type  
Non-Career Employee

NHR

HR Rep  
NH HR Representative

Position  
City Carrier Assistant 2

NTL

Training Rep  
NH Training Lead

Location  
03049-HOLLIS-1367208

Tasks/To-Dos

Activity

Attachments

< Day 80

Determine if New Hire should be removed from rolls

Due in 1 day

Determine if New Hire should be removed from rolls

HRT0004972 Due in 1 day

Attachments History

Ask a Question

This New Hire was not recommended for Retention during their 80-day review. Determine if the New Hire should be removed from the rolls.

**Note:** Managers and Supervisors must inform the Human Resources Shared Service Center (HRSSC) about any direct reports who are separating (voluntarily or involuntarily). Instructions for processing separations can be found at <https://blue.usps.gov/hr/hrssc-info/separations/> and must be initiated and completed outside of this system. It is critical this process is handled correctly and timely therefore, the submission of separation documentation for processing should be handled immediately upon receipt, regardless of effective date.

Once a separation has been initiated, select "Close Case due to Separation" from the Action menu above to close the New Hire's Onboarding Case.

Determine if New Hire should be removed from rolls

Click on the Complete button to mark task as complete.

Complete



# Module 6

## Initiating Separation

# Closing a ServiceNow HR Onboarding Case

The screenshot shows the ServiceNow HR Onboarding Case interface for Gerardo Li. The case details include: New Hire (GL), Gerardo Li; Supervisor (SS), SC Supervisor; HR Rep (SHR), SC HR Representative; Effective Date: 2021-10-19; Employment Type: Non-Career Employee; Position: MAIL M... 657. The 'Actions' dropdown menu is open, showing options: Close Onboarding Case, Send Email, Reassign Supervisor, Reassign HR Representative, and Reassign Training Lead. The 'Close Case' dialog box is open, displaying instructions and a form to complete the closure.

**Close Case**

Only proceed with taking the action if:

1. You want to stop the New Hire's Onboarding or the probationary period for this New Hire has ended.
2. You want to close the Onboarding case.

If you are closing this case due to separation...

This will not initiate a Separation request, follow the appropriate process outside this system to ensure the New Hire is removed from Rolls. Instructions for processing separations can be found at <https://blue.usps.gov/hr/hrssc-info/separations/>

Reason for Closing Case:

Voluntary Separation - New Hire Initiated

Additional Notes

Last day worked: 7/30/2021

☒ I confirm that a separation request has been initiated outside this system per the USPS guidelines, these details look correct and this onboarding case will be closed.

Cancel OK

**Closure Reason:**  
When closing a case, the user must identify a reason. Provide additional high-level notes if "Other" is selected (example "Duplicate record").

## Auto-Close:

ServiceNow HR Onboarding cases for non-ARC/RCA's will close automatically at the end of the New Hire's probationary period.

## Manual Closure:

- 1) ServiceNow HR cases for ARC/RCA's must be closed manually after training is complete.
- 2) ServiceNow HR cases for any New Hire must be closed manually in the event of a separation from USPS.

# Module 7

## Communication

## Communication – Sending an Email

**HR Pilot users** can send an email to other HR Pilot users, through the case\*. The email will be tracked in the case notes.

The screenshot displays the 'HR Onboarding: Gerardo Li' case page. At the top, there are tabs for 'New Hire', 'Supervisor', 'HR Rep', and 'Training'. Below these, fields for 'Effective Date' (2021-10-19), 'Employment Type' (Non-Career Employee), and 'Position' are visible. A 'Tasks/To-Dos' section on the left shows a timeline with 'Pre-Boarding', 'Day 1', 'Week 1', and 'Week 2'. A 'Compose Email' window is open in the foreground, showing fields for 'Reply to', 'To' (SC Training Lead; Add Recipient), 'Cc' (SC Supervisor; Add Recipient), 'Bcc' (Add Recipient), and 'Subject' (HRC0001309 - HR Onboarding: Doing Great!). The email body contains the text 'I just wanted to let you know that they have been doing a fantastic job! A+ hire!'. In the top right corner, an 'Actions' dropdown menu is open, with 'Send Email' highlighted. Other options in the menu include 'Close Onboarding Case', 'Reassign Supervisor', 'Reassign HR Representative', and 'Reassign Training Lead'.

**\*NOTE:** This feature should *ONLY* be used to communicate with other HR Pilot Users (Supervisors, Trainers, HR Representatives). This feature should *NOT* be used to communicate with the New Hires

## Communication – Updating ServiceNow HR Onboarding Case Notes

**HR Pilot users** can add notes to a case using the activity tab. For example, a Trainer and Supervisor might use these notes to coordinate on rescheduling training.

The screenshot displays the ServiceNow HR Onboarding case interface. At the top, the breadcrumb navigation shows 'Home > My Request'. The case details include the Number 'HRC0001309', Created '9d ago', Updated '18h ago', and State 'Ready'. The case title is 'HR Onboarding: Gerardo Li'. Below this, a summary section lists key roles and details: New Hire Gerardo Li (Effective Date: 2021-10-19), Supervisor SC Supervisor (Employment Type: Non-Career Employee), HR Rep SC HR Representative (Position: MAIL HANDLER ASSISTANT), and Training Rep SC Training Lead (Location: 29037-CHAPPELLS-1357657). The main section has three tabs: 'Tasks/To-Dos', 'Activity' (which is selected and highlighted with a red box), and 'Attachments'. Below the 'Activity' tab, there is a text input field with the placeholder 'Type your message here...' and a 'Post' button, both enclosed in a red box. Below the input field, a message from 'SC Training Lead' (SL) is shown, stating 'Messages posted on the activity tab will be saved to the case notes and can be seen by all user types!'. The message is timestamped 'just now' and includes a link for 'Additional comments'.

**NOTE:** These notes will not be emailed to user. They will only be kept in the activity tab ServiceNow HR Onboarding.

## Communication – Notes on System Generated Emails

### Automated/System Generated Emails

- Pre-defined, system generated emails will be sent to the HR Onboarding Pilot users throughout the Onboarding Process.
  - Emails to the New Hire will be sent to their personal email address.
  - **Emails will not be sent to the New Hire on or after their effective date.**
- Users can validate that these emails have been sent out via the Activity tab of the case.
- System generated emails will not be sent when a task is assigned:
  - New Hires will receive\* emails for certain orientations and trainings
  - Reminder emails will be sent to Supervisors when it is time to schedule certain meetings
  - Emails will be sent for tasks that have not been completed within two days of its due date

***\*NOTE:** If the task is completed prior to the New Hire's effective date, a system generated email containing the relevant information will be sent. However, if the task is completed past the New Hire's effective date, no system generated email will be sent to the New Hire and it will be the responsibility of the Supervisor, Trainer, or HR Representative to communicate the relevant information to the New Hire outside the HR Onboarding Pilot system. Users should not send any email to the New Hire from the system after the New Hire's effective date.*

# Module 8

## Reassignment



## Reassigning a Case

**HR Pilot users** can reassign a set of tasks of a case to a new user

**Tasks are assigned to one of three types of users:**

- 1) Supervisors
- 2) HR Representatives
- 3) Training Leads

The screenshot displays the 'HR Onboarding: Gerardo Li' interface. At the top, there are four role cards: GL (New Hire Gerardo Li), SS (Supervisor SC Supervisor), SHR (HR Rep SC HR Representative), and STL (Training Rep SC Training Lead). Below these, a 'Tasks/To-Dos' tab is active, showing a timeline with tasks: Pre-Boarding, Day 1, Week 1, Week 2 (highlighted), Day 30, Day 60, and Day 80. A modal titled 'Select User to Reassign' is open, featuring a 'Select User:' dropdown menu with 'NH HR Representative' selected. A 'Submit' button is located at the bottom right of the modal. In the top right corner, an 'Actions' dropdown menu is open, listing options: 'Close Onboarding Case', 'Send Email', 'Reassign Supervisor', 'Reassign HR Representative', and 'Reassign Training Lead'. Red boxes highlight the 'Actions' dropdown, the 'Reassign HR Representative' option, the 'NH HR Representative' selection in the modal, and the 'Submit' button.

# Module 9

## Submitting a Support Request

# Submitting a Support Request

**HR Pilot users** can submit a support request

**The following information is required to create a support request:**

- 1) District
- 2) Support Type
- 3) Opened For
- 4) Short Description
- 5) Description

The screenshot shows the 'HR Portal IT Support Request' form. At the top right, there is a navigation bar with 'To-dos 496', 'Requests', and 'Support Requests' (highlighted with a red box and a circled '1'). Below 'Support Requests' is a button 'Submit a Support Request' (highlighted with a red box and a circled '2') and a link 'My Support Requests'. The main form area has the title 'HR Portal IT Support Request' and the subtitle 'Ask a question about the HR portal'. A 'Submit' button is located at the top right of the form area (highlighted with a red box and a circled '4'). The form fields are: '\* Select District' (dropdown menu with 'ME-NH-VT' selected), '\* Support Type' (dropdown menu with 'Supervisor' selected), '\* Opened for' (dropdown menu with 'Brock Sizer' selected, highlighted with a red box and a circled '3'), '\* Short Description' (text area with 'Can't see New Hire - John Doe'), and '\* Description' (text area with 'When searching for my New Hire via the My Requests page, my New Hire, John Doe, does not appear in the list.'). At the bottom right of the form is a link 'Add attachments'.

## Lab / Activities

Lab/ Activity #	Topic Covered	Est. Time (min)
1.	Onboarding Portal Overview (Homepage widgets, My Requests Page, My To-Dos Page, My Team Page, Helpful Links)	10
2.	Training Portal Overview (Homepage widgets, My Requests Page, My To-Dos Page, My Team Page, Helpful Links, Training Widget)	10
3.	Training Widget (Scheduling training, updating training sessions, bulk updates for attendance)	10
4.	Dashboard (Navigating to Dashboard, Dashboard tabs, Dashboard filters)	5
5.	Reporting Running/Creating ad-hoc reports	5
6.	Supervisor Tasks	60
7.	Trainer Tasks	30
8.	HR Representative Tasks	20
9.	Cancelling a case	5
10.	Communications (Creating quick messages & using them from Actions UI)	10
11.	Reassignment	5
12.	Submitting a Support Request	5
13.	Working a Support Request	5

## Lab 1 – Onboarding Portal

1. **Navigate to the HR Onboarding Portal** (<https://guspsonboarding.servicenowservices.com/onboarding>)
2. **Click through the different widgets on the homepage to familiarize yourself with the portal**
  1. Search for New Hires through the search bar on the homepage
  2. Click into My Requests and My To-Dos to familiarize yourself with the layout of the tasks/activities assigned to the logged in user
  3. Click into My Teams to better understand the your team structure
  4. NOTE: Direct reports and managers may not be visible to all users as the data is not available in the HR Onboarding Pilot system
  5. Click into Helpful Links to view resources available to aid in the Onboarding process

## Lab 2 – Training Portal

1. **Navigate to the HR Training Portal** (<https://quspsonboarding.servicenowservices.com/training>)
2. **Click through the different widgets on the Homepage to familiarize yourself with the portal**
  1. Trying searching for New Hires through the search bar on the homepage
  2. Click into My Requests and My To-Dos to familiarize yourself with the layout of the tasks/activities assigned to the logged in user
  3. Click into My Teams to better understand the your team structure
  4. NOTE: Direct reports and managers may not visible to all users as the data is not available in the HR Onboarding Pilot system
  5. Click into Helpful Links to view resources available to aid in the Onboarding process

## Lab 3 – Training Widget

### 1. Schedule a Training Session & Add Attendees Simultaneously

1. On the Homepage, click the 'Schedule a Training Session' button (under the 'Training Sessions' and 'Recent New Hires' sections)
2. Complete the required fields (Course Title, Location, Training Type, Date/Time, Facilitator)
3. Click 'Submit'
4. If you are not adding attendees at this time, skip to the next step. Otherwise, click 'Add Attendees,' then search for the New Hires you would like to include in this training and select their checkboxes. When finished, click 'Add Selected.'
5. Click "Next: Review Summary & Confirm"
6. Review your selections. Once confirmed, click 'Finish.'

### 2. Edit existing Training Session details

1. On the Homepage, click the 'View All' link under (at the bottom of the 'Training Sessions' section)
2. Find and select the Session to which you would like to add attendees
3. Click 'Edit Training Details'
4. Edit training session details as you see fit
5. Click 'Save'
6. Use your browser's 'back' button to return to the training session summary page



## Lab 3 – Training Widget (cont.)

### 3. Add attendees to an existing Training Session

1. On the Homepage, click the 'View All' link under (at the bottom of the 'Training Sessions' section)
2. Find and select the Session to which you would like to add attendees
3. Click 'Edit Attendees'
4. Click 'Add Attendees,' then search for the New Hires you would like to include in this training and select their checkboxes. When finished, click 'Add Selected.'
5. Click "Next: Review Summary & Confirm"
6. Review your selections. Once confirmed, click 'Finish.'

### 4. Mark attendance for a Training Session

1. On the Homepage, click the 'View All' link under (at the bottom of the 'Training Sessions' section)
2. Find and select the session for which you would like to mark attendance
3. In the Attendees section, record the hours attended, attendance status (Attended, No Show, Partial Attendance), and notes (if applicable) for each attendee.
4. Click "Log Attendance and Close Training"

## Lab 4 – Dashboard

1. **Navigate to the HR Onboarding Portal (<https://quspsonboarding.servicenowservices.com/onboarding>) and click 'View All Reports' under 'My Overview' to navigate to the HR Onboarding Dashboard**
2. **Click the Active HR Cases tab and familiarize yourself with the displayed reports:**
  1. Active Cases Count (Number)
  2. Cases by HR Service
  3. HR Service Table
  4. HR Onboarding Cases by Activity Set
  5. RCA/ARC Cases by Activity Set
  6. All Active Cases
  7. NOTE: Try changing the filter conditions to see how the reports are updated based on defined criteria
3. **Click the Active To Dos tab and familiarize yourself with the displayed reports:**
  1. Active To-Dos Count (Number)
  2. Active To-Dos

NOTE: Try changing the filter conditions to see how the reports are updated based on defined criteria

## Lab 5 – Reporting

1. **Navigate to the HR Onboarding Portal (<https://quspsonboarding.servicenowservices.com/onboarding>) and click ‘View All Reports’ under ‘My Overview’ to navigate to the backend view of the HR Onboarding Pilot system**
2. **Type ‘Reporting’ in the filter navigator to navigate to HR Dashboard & Reports > Reports**
3. **Click through the different tabs to familiarize yourself with the different reports available for you to view in the HR Onboarding Pilot system**
  1. My Reports: Reports created by the logged in user
  2. Group: Reports shared with the logged in user via group or user
  3. Global: Reports that are shared as global
  4. All: All reports accessible by the logged in user
4. **Create a new report using the ‘Create a Report’ button**
  1. Data: Populate a name for the report, select ‘Table’ for data source, and select ‘HR Lifecycle Event Cases’ OR ‘HR Tasks’ to generate a report for the HR Onboarding Pilot data
  2. Type: Select a type of report you would like to use to display the data (e.g. Pie Chart, Bar Graph, etc.)
  3. Configure: Select how you would like to group the data.
  4. Style: Update the color palette, size, and format
5. **Click ‘Run’ to generate the report. Make changes as needed and click ‘Save’ to save the report.**
6. **Click ‘Share’ to share the report with a specific group or user**

# Lab 6

## Supervisor Tasks

## Lab 6.1 – Pre-Boarding Tasks

1. **Navigate to the HR Onboarding Portal (<https://quspsonboarding.servicenowservices.com/onboarding>) and click 'My Requests' to view a list of all open HR Onboarding Requests**
2. **Select a request that is not closed or cancelled. Once the request is displayed, click the 'Pre-Boarding' link under the timeline to view all tasks. Select 'Assigned to Me' under the drop-down in the center of the page. The following tasks will be displayed:**
  1. Enter Report to Unit/Duty Station Details
  2. Contact New Hire regarding job requirements
3. **Click 'Enter Report to Unit/Duty Station Details' task**
  1. Populate the mandatory fields (indicated by a red \*)
  2. Click 'Submit'
  3. Click 'Pre-boarding'
4. **Click 'Contact New Hire regarding job requirements' task**
  1. Familiarize yourself with the displayed information
  2. Click 'Complete'
  3. Click 'Pre-boarding'
5. **Select 'Assigned to Me' under the drop-down in the center of the page. No tasks should be displayed**

## Lab 6.2 – Day 1 Tasks

1. **Navigate to the HR Onboarding Portal (<https://quspsonboarding.servicenowservices.com/onboarding>) and click 'My Requests' to view a list of all open HR Onboarding Requests**
2. **Select a request that is not closed or cancelled. Once the request is displayed, click the 'Day 1' link under the timeline to view all tasks. Select 'Assigned to Me' under the drop-down in the center of the page. The following tasks will be displayed:**
  1. Schedule Shadow Day with New Hire
3. **Click 'Schedule Shadow Day with New Hire' task**
  1. Populate the mandatory fields (indicated by a red \*)
  2. Click 'Submit'
  3. Click 'Day 1'
4. **Select 'Assigned to Me' under the drop-down in the center of the page. No tasks should be displayed**

## Lab 6.3 – Week 1 Tasks

1. **Navigate to the HR Onboarding Portal (<https://guspsonboarding.servicenowservices.com/onboarding>) and click 'My Requests' to view a list of all open HR Onboarding Requests**
2. **Select a request that is not closed or cancelled. Once the request is displayed, click the 'Week 1' link under the timeline to view all tasks. Select 'Assigned to Me' under the drop-down in the center of the page. The following tasks will be displayed:**
  1. Schedule Initial Meeting with Supervisor
  2. Prepare for Shadow Day with New Hire
  3. Enter New Hire time into TACS (Week1)
  4. Welcome New Hire to the Unit/Duty Station
  5. Prepare for New Hire's First Day in the Unit/Duty Station
3. **Click 'Prepare for Shadow Day with New Hire' task**
  1. Download the Supervisor Checklist by clicking the second button from the left in the menu (square with downward pointing arrow)
  2. Click 'Accept and Complete' button
  3. Click 'Week 1'
4. **Click 'Enter New Hire time into TACS (Week1)' task**
  1. Familiarize yourself with the displayed information
  2. Click 'Complete'
  3. Click 'Week 1'

## Lab 6.3 – Week 1 Tasks

### 5. Click 'Welcome New Hire to the Unit/Duty Station' task

1. Download the Welcome New Hire to the Unit/Duty Station Checklist by clicking the second button from the left in the menu (square with downward pointing arrow)
2. Click 'Accept and Complete' button
3. Click 'Week 1'

### 6. Click 'Prepare for New Hire's First Day in the Unit/Duty Station' task

1. Download the Preparing for the first day Checklist by clicking the second button from the left in the menu (square with downward pointing arrow)
2. Click 'Accept and Complete' button
3. Click 'Week 1'

### 7. Select 'Assigned to Me' under the drop-down in the center of the page. No tasks should be displayed



## Lab 6.4 – Week 2 Tasks

1. **Navigate to the HR Onboarding Portal (<https://quspsonboarding.servicenowservices.com/onboarding>) and click 'My Requests' to view a list of all open HR Onboarding Requests**
2. **Select a request that is not closed or cancelled. Once the request is displayed, click the 'Week 2' link under the timeline to view all tasks. Select 'Assigned to Me' under the drop-down in the center of the page. The following tasks will be displayed:**
  1. Schedule 30-Day Review
  2. Conduct Initial Meeting With Supervisor
  3. Enter New Hire Time into TACS (Week 2)
3. **Click 'Enter New Hire time into TACS (Week 2)' task**
  1. Familiarize yourself with the displayed information
  2. Click 'Complete'
  3. Click 'Week 2'
4. **Click 'Conduct Initial Meeting with Supervisor' task**
  1. Select the Certification Statement
  2. Click 'Submit'
  3. Click 'Week 2'
5. **Click 'Schedule 30 Day Review' task**
  1. Populate the mandatory fields (indicated by a red \*)
  2. Click 'Submit'
  3. Click 'Week 2'
6. **Select 'Assigned to Me' under the drop-down in the center of the page. No tasks should be displayed**

## Lab 6.5 – Day 30 Tasks

1. **Navigate to the HR Onboarding Portal (<https://guspsonboarding.servicenowservices.com/onboarding>) and click 'My Requests' to view a list of all open HR Onboarding Requests**
2. **Select a request that is not closed or cancelled. Once the request is displayed, click the 'Day 30' link under the timeline to view all tasks. Select 'Assigned to Me' under the drop-down in the center of the page. The following tasks will be displayed:**
  1. Enter ratings and generate review form
  2. Conduct 30-Day Review
  3. Schedule 60-Day Review
3. **Click 'Enter ratings and generate review form' task**
  1. Populate the mandatory fields (indicated by a red \*)
  2. Click 'Submit'
  3. Click 'Day 30'
  4. Click 'Activity' to view the generated form 1750
4. **Click 'Conduct 30-Day Review' task**
  1. Select the Certification Statement and confirm whether or not the new hire signed the review
  2. Click 'Submit'
  3. Click 'Day 30'
5. **Click 'Schedule 60 Day Review' task**
  1. Populate the mandatory fields (indicated by a red \*)
  2. Click 'Submit'
  3. Click 'Day 30'
6. **Select 'Assigned to Me' under the drop-down in the center of the page. No tasks should be displayed**

## Lab 6.6 – Day 60 Tasks

1. **Navigate to the HR Onboarding Portal (<https://guspsonboarding.servicenowservices.com/onboarding>) and click 'My Requests' to view a list of all open HR Onboarding Requests**
2. **Select a request that is not closed or cancelled. Once the request is displayed, click the 'Day 60' link under the timeline to view all tasks. Select 'Assigned to Me' under the drop-down in the center of the page. The following tasks will be displayed:**
  1. Enter ratings and generate review form
  2. Conduct 60-Day Review
  3. Schedule 80-Day Review
3. **Click 'Enter ratings and generate review form' task**
  1. Populate the mandatory fields (indicated by a red \*)
  2. Click 'Submit'
  3. Click 'Day 60'
  4. Click 'Activity' to view the generated form 1750
4. **Click 'Conduct 60-Day Review' task**
  1. Select the Certification Statement and confirm whether or not the new hire signed the review
  2. Click 'Submit'
  3. Click 'Day 60'
5. **Click 'Schedule 80 Day Review' task**
  1. Populate the mandatory fields (indicated by a red \*)
  2. Click 'Submit'
  3. Click 'Day 60'
6. **Select 'Assigned to Me' under the drop-down in the center of the page. No tasks should be displayed**

## Lab 6.7 – Day 80 Tasks

1. **Navigate to the HR Onboarding Portal (<https://quspsonboarding.servicenowservices.com/onboarding>) and click 'My Requests' to view a list of all open HR Onboarding Requests**
2. **Select a request that is not closed or cancelled. Once the request is displayed, click the 'Day 60' link under the timeline to view all tasks. Select 'Assigned to Me' under the drop-down in the center of the page. The following tasks will be displayed:**
  1. Enter ratings and generate review form
  2. Conduct 80-Day Review
3. **Click 'Enter ratings and generate review form' task**
  1. Populate the mandatory fields (indicated by a red \*)
  2. Click 'Submit'
  3. Click 'Day 80'
  4. Click 'Activity' to view the generated form 1750
4. **Click 'Conduct 80-Day Review' task**
  1. Select the Certification Statement and confirm whether or not the new hire signed the review
  2. Click 'Submit'
  3. Click 'Day 80'
5. **Select 'Assigned to Me' under the drop-down in the center of the page. No tasks should be displayed**

# Lab 7

## Trainer Tasks

## Lab 5 – Pre-Boarding Tasks

1. **Navigate to the HR Onboarding Portal (<https://quspsonboarding.servicenowservices.com/onboarding>) and click 'My Requests' to view a list of all open HR Onboarding Requests**
2. **Select a request that is not closed or cancelled. Once the request is displayed, click the 'Pre-Boarding' link under the timeline to view all tasks. Select 'Assigned to Me' under the drop-down in the center of the page. The following task(s) will be displayed:**
  1. **Schedule 'XXX' Training**  
**NOTE:** The HR Onboarding system will automatically create a separate 'Scheduling' task for each type of training relevant to that occupation code. Therefore, there may be more than one 'Scheduling' task.
3. **Click 'Schedule 'XXX' Training' task and select the appropriate training session from the drop-down list**
4. **Continue through all 'Schedule 'XXX' Training' tasks**
5. **Select 'Assigned to Me' under the drop-down in the center of the page. No tasks should be displayed**

## Lab 6 – Week 1 Tasks

1. **Navigate to the HR Onboarding Portal (<https://quspsonboarding.servicenowservices.com/onboarding>) and click 'My Requests' to view a list of all open HR Onboarding Requests**
2. **Select a request that is not closed or cancelled. Once the request is displayed, click the 'Week 1' link under the timeline to view all tasks. Select 'Assigned to Me' under the drop-down in the center of the page. The following task(s) will be displayed:**
  1. Mark Attendance for 'XXX' Training  
**NOTE:** The HR Onboarding system will automatically create a separate 'Mark Attendance...' task for each type of training relevant to that occupation code. Therefore, there may be more than one 'Mark Attendance...' task.
3. **Click 'Mark Attendance for 'XXX' Training' task and complete the required fields**
  1. Number of Hours Attended
  2. Employee's Completion Status
  3. Notes (if applicable)
  4. Click 'Submit'
4. **Continue through all 'Mark Attendance for 'XXX' Training' tasks**
5. **Select 'Assigned to Me' under the drop-down in the center of the page. No tasks should be displayed**

## Lab 7 – Week 2 Tasks

1. **Navigate to the HR Onboarding Portal (<https://quspsonboarding.servicenowservices.com/onboarding>) and click 'My Requests' to view a list of all open HR Onboarding Requests**
2. **Select a request that is not closed or cancelled. Once the request is displayed, click the 'Week 2' link under the timeline to view all tasks. Select 'Assigned to Me' under the drop-down in the center of the page. The following tasks will be displayed:**
  1. **Mark Attendance for 'XXX' Training**  
**NOTE:** The HR Onboarding system will automatically create a separate 'Mark Attendance...' task for each type of training relevant to that occupation code. Therefore, there may be more than one 'Mark Attendance...' task.
3. **Click 'Mark Attendance for 'XXX' Training' task and complete the required fields**
  1. Number of Hours Attended
  2. Employee's Completion Status
  3. Notes (if applicable)
  4. Click 'Submit'
4. **Continue through all 'Mark Attendance for 'XXX' Training' tasks**
5. **Select 'Assigned to Me' under the drop-down in the center of the page. No tasks should be displayed**



# Lab 8

## HR Representative Tasks

## Lab 8.1 – Pre-Boarding Tasks

1. **Navigate to the HR Onboarding Portal (<https://quspsonboarding.servicenowservices.com/onboarding>) and click 'My Requests' to view a list of all open HR Onboarding Requests**
2. **Select a request that is not closed or cancelled. Once the request is displayed, click the 'Pre-Boarding' link under the timeline to view all tasks. Select 'Assigned to Me' under the drop-down in the center of the page. The following tasks will be displayed:**
  1. Send New Hire travel/booking information
3. **Click 'Send New Hire travel/booking information' task**
  1. Read the information provided
  2. Take any 'outside-the-system' actions necessary
  3. Click 'Submit' to confirm the task is complete
4. **Select 'Assigned to Me' under the drop-down in the center of the page. No tasks should be displayed**

## Lab 8.2 – Week 1 Tasks

1. **Navigate to the HR Onboarding Portal (<https://quspsonboarding.servicenowservices.com/onboarding>) and click 'My Requests' to view a list of all open HR Onboarding Requests**
2. **Select a request that is not closed or cancelled. Once the request is displayed, click the 'Week 1' link under the timeline to view all tasks. Select 'Assigned to Me' under the drop-down in the center of the page. The following tasks will be displayed:**
  1. Determine if New Hire should be removed from rolls
3. **Click 'Determine if New Hire should be removed from rolls' task**
  1. Read the information provided
  2. Take any 'outside-the-system' actions necessary
  3. Click 'Submit' to confirm the task is complete
4. **Select 'Assigned to Me' under the drop-down in the center of the page. No tasks should be displayed**

## Lab 8.3 – Day 30 Tasks

1. **Navigate to the HR Onboarding Portal (<https://quspsonboarding.servicenowservices.com/onboarding>) and click 'My Requests' to view a list of all open HR Onboarding Requests**
2. **Select a request that is not closed or cancelled. Once the request is displayed, click the 'Day 30' link under the timeline to view all tasks. Select 'Assigned to Me' under the drop-down in the center of the page. The following tasks will be displayed:**
  1. Determine if New Hire should be removed from rolls
3. **Click 'Determine if New Hire should be removed from rolls' task**
  1. Read the information provided
  2. Take any 'outside-the-system' actions necessary
  3. Click 'Submit' to confirm the task is complete
4. **Select 'Assigned to Me' under the drop-down in the center of the page. No tasks should be displayed**

## Lab 8.4 – Day 60 Tasks

1. **Navigate to the HR Onboarding Portal (<https://quspsonboarding.servicenowservices.com/onboarding>) and click 'My Requests' to view a list of all open HR Onboarding Requests**
2. **Select a request that is not closed or cancelled. Once the request is displayed, click the 'Day 60' link under the timeline to view all tasks. Select 'Assigned to Me' under the drop-down in the center of the page. The following tasks will be displayed:**
  1. Determine if New Hire should be removed from rolls
3. **Click 'Determine if New Hire should be removed from rolls' task**
  1. Read the information provided
  2. Take any 'outside-the-system' actions necessary
  3. Click 'Submit' to confirm the task is complete
4. **Select 'Assigned to Me' under the drop-down in the center of the page. No tasks should be displayed**

## Lab 8.5 – Day 80 Tasks

1. **Navigate to the HR Onboarding Portal (<https://quspsonboarding.servicenowservices.com/onboarding>) and click 'My Requests' to view a list of all open HR Onboarding Requests**
2. **Select a request that is not closed or cancelled. Once the request is displayed, click the 'Day 80' link under the timeline to view all tasks. Select 'Assigned to Me' under the drop-down in the center of the page. The following tasks will be displayed:**
  1. Determine if New Hire should be removed from rolls
3. **Click 'Determine if New Hire should be removed from rolls' task**
  1. Read the information provided
  2. Take any 'outside-the-system' actions necessary
  3. Click 'Submit' to confirm the task is complete
4. **Select 'Assigned to Me' under the drop-down in the center of the page. No tasks should be displayed**

## Lab 9 – Initiating Separation

1. **Navigate to the HR Onboarding Portal (<https://quspsonboarding.servicenowservices.com/onboarding>) and click 'My Requests' to view a list of all open HR Onboarding Requests**
2. **Select a request that is not closed or cancelled.**
3. **Click the 'Actions' button on the HR case view. The drop-down is expanded and the following values are displayed:**
  1. Send Email
  2. Close Onboarding Case
  3. Reassign Supervisor
  4. Reassign HR Representative
  5. Reassign Training Lead
4. **Click 'Close Onboarding Case'**
  1. Populate the mandatory fields (indicated by red \*)
  2. For Reason of Cancellation, select 'Voluntary Separation - New Hire Initiated' OR 'Involuntary Separation - Employer Initiated'
  3. Read the confirmation statement and check the checkbox
  4. Click 'Close Case'
5. **Click 'Activity' tab near middle of page to confirm an entry was added to indicate Case Closure email was sent to the HR Rep**

## Lab 10 – Communication

1. **Navigate to the HR Onboarding Portal (<https://quspsonboarding.servicenowservices.com/onboarding>) and click 'View All Reports' under 'My Overview' to navigate to the HR Onboarding Dashboard**
2. **Type 'Quick Messages' in the filter navigator**
  1. Select Email Client > Quick Messages
  2. Click 'New'
  3. Populate the mandatory fields, make sure the 'active' field is checked and the table field is populated with 'HR Lifecycle Events Case', and click 'Submit'
3. **Navigate to the HR Onboarding Portal (<https://quspsonboarding.servicenowservices.com/onboarding>) and click 'My Requests' to view a list of all open HR Onboarding Requests**
4. **Select a request that is not closed or cancelled.**



## Lab 10 – Communication

5. **Click the 'Actions' button on the HR case view. The drop-down is expanded and the following values are displayed:**
  1. Send Email
  2. Close Onboarding Case
  3. Reassign Supervisor
  4. Reassign HR Representative
  5. Reassign Training Lead
6. **Click 'Send Email'**
  1. Click the Quick Messages drop-down on top right
  2. Populate the 'To' field and click 'Send'
7. **Click 'Activity' tab near middle of page to confirm an entry was added to indicate the email was sent**

## Lab 11 – Reassignment

1. **Navigate to the HR Onboarding Portal (<https://quspsonboarding.servicenowservices.com/onboarding>) and click ‘My Requests’ to view a list of all open HR Onboarding Requests**
2. **Select a request that is not closed or cancelled.**
3. **Click the ‘Actions’ button on the HR case view. The drop-down is expanded and the following values are displayed:**
  1. Send Email
  2. Close Onboarding Case
  3. Reassign Supervisor
  4. Reassign HR Representative
  5. Reassign Training Lead
4. **Click ‘Reassign HR Representative’**
  1. Select a user to reassign as HR Representative on the case
  2. Click ‘Save’

## Lab 12 – Submitting a Support Request

1. **Navigate to the HR Onboarding Portal (<https://quspsonboarding.servicenowservices.com/onboarding>) and click 'My Support Requests' on the top right**
2. **Select a 'Submit a Support Request'**
3. **Populate the mandatory fields (indicated by the red \*) and click 'Submit'**

## Lab 13 – Working a Support Request

1. **Navigate to the HR Onboarding Portal (<https://guspsonboarding.servicenowservices.com/onboarding>) and click 'View All Reports' to navigate to the backend view**
2. **Select a 'HRIT Cases' from the filter navigator**
3. **Select an HR Case from the displayed list**
  1. If the 'Assigned To' field is unpopulated, populate the field with your own name and click 'Ready for Work'
  2. Click 'Start Work'
  3. Populate your comments in the 'Additional Comments' field and click 'Update'
  4. Click 'Close Complete' to close the HR Case
4. **Note: The end user (Opened For/Subject Person) will come in and click 'Accept Completion' to indicate that their issue has been resolved. If they are not satisfied with the resolution, they can click 'Reject Completion' and the case will reopen for you to provide additional comments.**
5. **NOTE: Users can reassign the case to Tier 2 by updating the Assignment Group field if Tier 1 does not have the resolution**

# HR Onboarding Pilot

HR Representative

## Expectations: Before We Begin



- Be engaged.
- Ask questions in the chat.
- Please mute your phones/microphones.
- Please do NOT place us on hold/multitask.
- This is your training!

## Objectives & Goals

By the end of the training session, participants will:

- ✓ Understand the role of the HR Lead as it pertains to the HR Onboarding Pilot
- ✓ Be familiar with the following:
  - ✓ How to access and navigate the different widgets on the HR Onboarding Pilot Training Portal
  - ✓ How to access and monitor the HR Onboarding Dashboard
  - ✓ How to access and report on a list of ALL Onboarding cases
  - ✓ How to access and take action on tasks assigned to HR Lead in the Onboarding Lifecycle Event (e.g. booking new hire travel)
  - ✓ How to initiate reassignment of the HR Lead associated to an Onboarding case
  - ✓ How to monitor communications (e.g. work notes and emails) associated to HR Onboarding cases
  - ✓ How to communicate with new hire, Supervisor, and Training Leads from the system via direct messages (emails)
  - ✓ How to communicate with Training Lead, Supervisor, and other HR Leads through work notes and comment on the HR case
  - ✓ How to creating and accessing quick messages

## Course Modules

Module	Topic Covered	Est. Time (min)
1.	Portal (Homepage widgets, My Requests Page, My To-Dos Page, My Team Page, Helpful Links)	10
2.	Dashboard & Reporting (Navigating to Dashboard, Dashboard tabs, Dashboard filters)	5
3.	Workflow	25
	3.1 Pre-Boarding	
	3.2 Week 1 Tasks	
	3.3 Day 30 Tasks	
	3.4 Day 60 Tasks	
	3.5 Day 80 Tasks	
4.	Closing a ServiceNow HR Onboarding cases	5
5.	Communications (Creating quick messages & using them from Actions UI)	10
6.	Reassignment	5
7.	Submitting a Support Request	5
8.	Labs/Activities	65






## Project Overview – HR Onboarding Pilot

### Project Overview

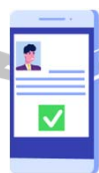
The HR Onboarding Pilot's goal is to create standardized, repeatable, and automated workflows and processes for onboarding procedures and probationary activities for two pilot districts (Maine-New Hampshire-Vermont and South Carolina) for non-career and bargaining positions. It will support automated, electronic means for action and milestone tracking while increasing visibility for the managers and HR professionals tasked with delivering the appropriate communications, training, and performance feedback for new hires.

### Timeline

FY21		FY22					
	SEP	OCT		NOV		DEC	
Pilot Training (9/7-16)							
Pilot (9/17 – 12/31)							
Analyze Results and Feedback							

# Project Overview – HR Onboarding Pilot

*I accepted my offer and am looking forward to receiving information on next steps.*



## PRE-BOARDING

*I am eager to get started; The Orientation Letter confirmed my position, unit, and details of my Orientation. The New Hire site makes everything very straightforward.*

## DAY 1 (OF ORIENTATION)

*I was able to complete the "Welcome to USPS" training without issue. The Orientation team was very helpful and well-coordinated.*



## WEEK 1

*There was lots to do this week, Onboarding Forms, Driver Training, and additional Orientation Training, but so far everything is going very smoothly.*

## 30 DAY

*My Supervisor has provided me with very clear feedback, and I was able to clarify my questions and expectations without issue.*



## WEEK 2

*I'm excited to finally take part in a Shadow Day and On the Job training to learn more about my job.*



## 60 DAY

*I'm glad I had the opportunity to improve since the previous review. My second review went exactly as I expected.*



## 90 DAY

*Finally! My last review went well, and I am a part of the team. The whole process went smoother than I expected.*



## 80 DAY

*I'm glad I had the opportunity to improve since the previous review. My third review went exactly as I expected.*



**NOTE: RCA/ARCs will end System Process at the end of Week 2**

**NOTE: Shadow Days only apply to newly hired city and rural carriers. If the Shadow Day is not applicable to a newly hired employee, you do not need to complete the action in the HR Onboarding Pilot System**

## HR Representative Roles & Responsibilities



MAKE TRAVEL AND  
ACCOMMODATION  
ARRANGEMENTS IF NECESSARY



ENSURE NECESSARY PROCESSES  
ARE FOLLOWED IN CASE OF A  
SEPARATION



COORDINATE WITH TRAINERS AND  
SUPERVISORS TO COMPLETE AND  
FILE ONBOARDING PAPERWORK

# Module 1

HR Onboarding Portal

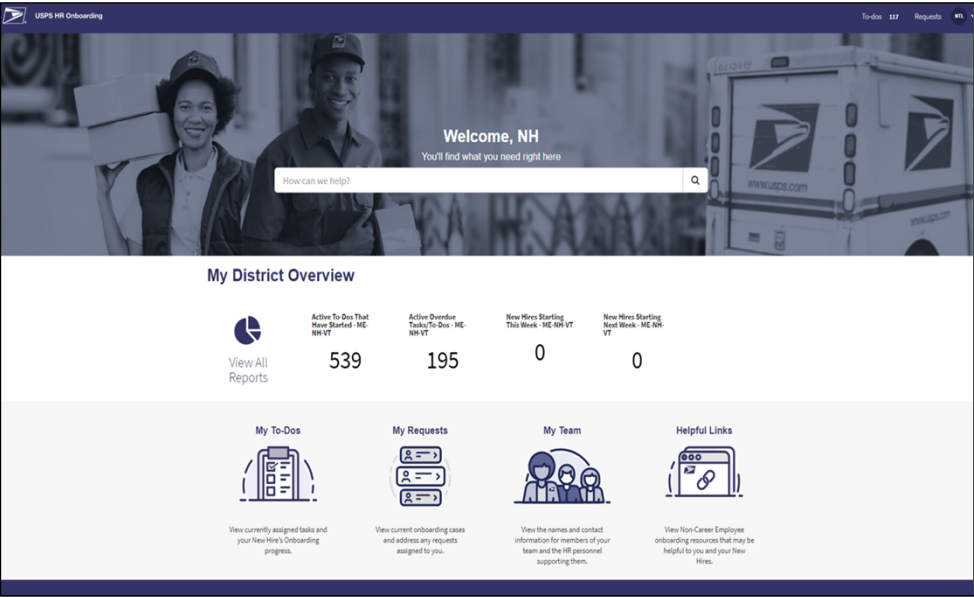
## Portal – URL and Access

- **Environment URL and Access:**
  - Onboarding Portal
    - CAT URL: <https://quspsonboarding.servicenowservices.com/onboarding>
    - PROD URL: <https://uspsonboarding.servicenowservices.com/onboarding>
  - Training Portal
    - CAT URL: <https://quspsonboarding.servicenowservices.com/training>
    - PROD URL: <https://uspsonboarding.servicenowservices.com/training>
- All HR Pilot users will have access prior to go-live. However, if users need access to the system after go-live, they can request access following these steps:
  - To request access, email the HR coordinators. HR Coordinators will submit a Support Request in the HR Onboarding Pilot system. The HR Onboarding Pilot Tier 2 team will grant access and notify the HR coordinators. HR Coordinators will notify the users.

# Portal

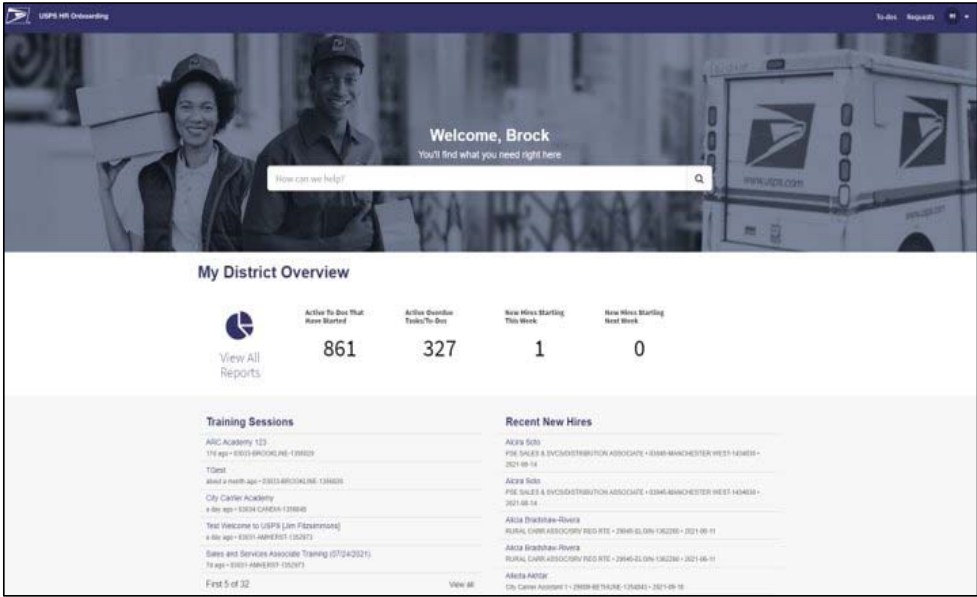
## Onboarding Portal

Supervisors will access the Pilot through the Onboarding Portal



## Training Portal

Trainers and HR Representatives will access the Pilot through the Training Portal



# Module 2

## Dashboard & Reporting

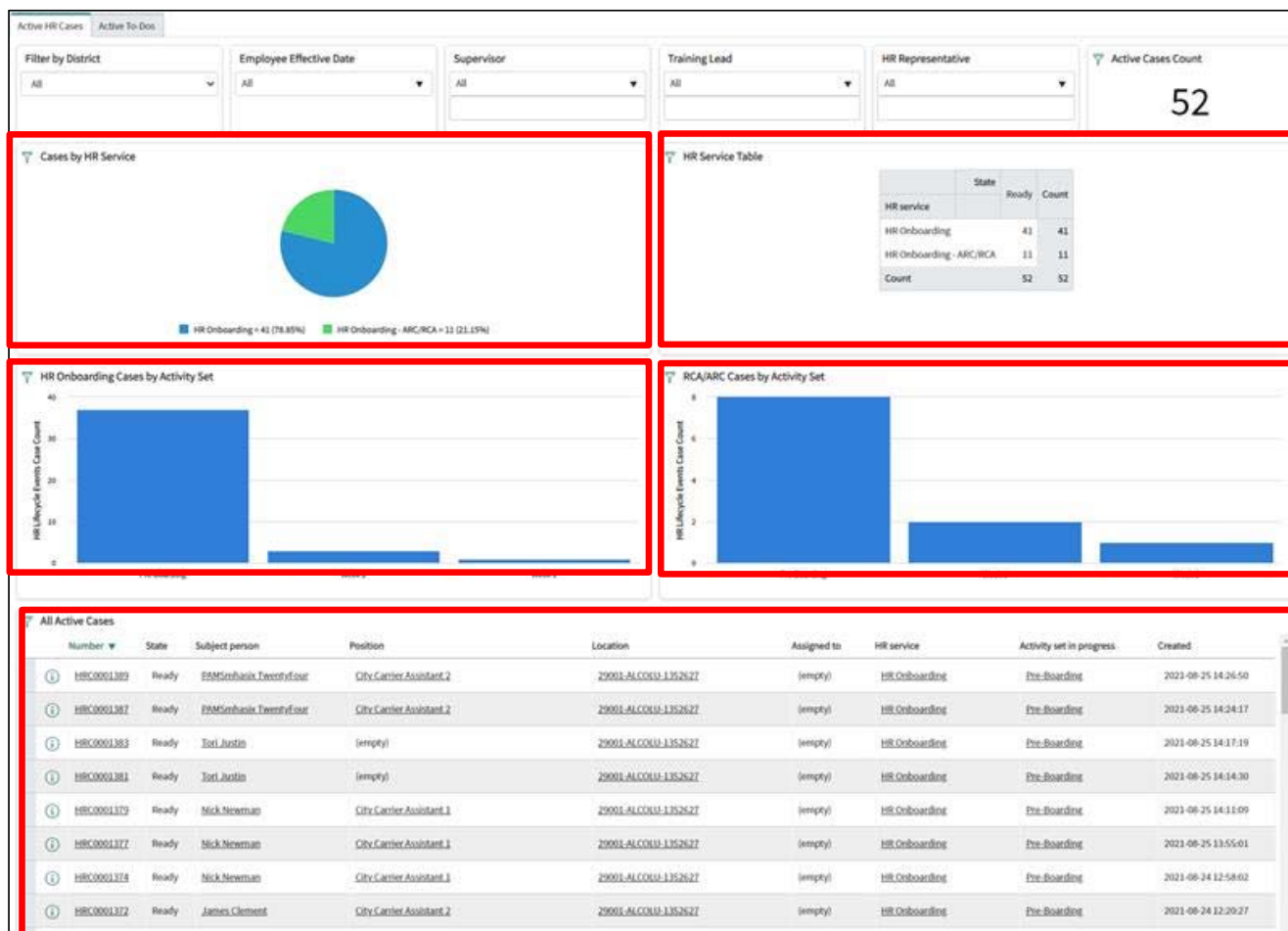
# Dashboard & Reporting – Active HR Cases

## • Metrics

- Active Cases Count (Number)
- Cases by HR Service
- HR Service Table
- Onboarding Cases by Activity Set
- RCA/ARC Cases by Activity Set
- All Active Cases

## • Filters

- District
- Employee Effective Date
- Supervisor
- HR Representative
- Training Lead





## Dashboard & Reporting – Active To-Dos

- **Metrics/Reports**

- Active To-Dos That Have Started
- All Active To-Dos

- **Filters**

- District
- Employee Effective Date
- Assigned To
- Due Date

Active HR Cases

Active To-Dos

Filter To-Dos by District

All

Assigned to

All

Employee Effective Date

All

Due Date

Last 7 days

7 Active To-Dos That Have Started

458

Active To-Dos

Number	Parent	Subject person	Short description	Position	Location	State	Assigned to	Due date
① HRT0004799	HRC0001315	Lisa Samuel	Enter ratings and generate 60-day review form	City Carrier Assistant 1	03033-BROOKLINE-1356020	Ready	NH Supervisor	2021-07-23 00:00:00
① HRT0004797	HRC0001315	Lisa Samuel	Determine if New Hire should be removed from rolls	City Carrier Assistant 1	03033-BROOKLINE-1356020	Ready	NH HR Representative	2021-07-23 00:00:00
① HRT0004800	HRC0001315	Lisa Samuel	Participate in 60 Day Review	City Carrier Assistant 1	03033-BROOKLINE-1356020	Ready	Lisa Samuel	2021-07-23 00:00:00
① HRT0004786	HRC0001315	Lisa Samuel	Schedule 80-Day Review	City Carrier Assistant 1	03033-BROOKLINE-1356020	Ready	NH Supervisor	2021-07-23 00:00:00
① HRT0004798	HRC0001315	Lisa Samuel	Conduct 60-Day Review	City Carrier Assistant 1	03033-BROOKLINE-1356020	Ready	NH Supervisor	2021-07-23 00:00:00
① HRT0003961	HRC0001249	Martha Gamblin	Prepare for Orientation	ASSISTANT RURAL CARRIER (ARC)	29041-DAVIS STATION-1437129	Ready	Martha Gamblin	2021-07-23 18:52:14
① HRT0003984	HRC0001251	Alleda Akhtar	Contact New Hire regarding job requirements	City Carrier Assistant 1	29009-BETHUNE-1354843	Ready	SC Supervisor	2021-07-23 18:52:20
① HRT0003965	HRC0001251	Alleda Akhtar	Prepare for Orientation	City Carrier Assistant 1	29009-BETHUNE-1354843	Ready	Alleda Akhtar	2021-07-23 18:52:20
① HRT0003979	HRC0001251	Alleda Akhtar	Send New Hire Travel & Booking information if required	City Carrier Assistant 1	29009-BETHUNE-1354843	Ready	SC HR Representative	2021-07-23 18:52:20
① HRT0003978	HRC0001251	Alleda Akhtar	Enter Report to Unit/Duty Station Details	City Carrier Assistant 1	29009-BETHUNE-1354843	Ready	SC Supervisor	2021-07-23 18:52:25

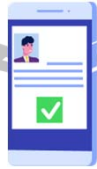
**NOTE:** HR Onboarding Pilot fulfiller users (Supervisors, Trainers, HR Representatives) can create their own reports and share the report with specific users and/or groups. Instructions in the corresponding Lab.

# Module 3

Workflow

# Project Overview - USPS HR Onboarding Pilot Journey Map

*I accepted my offer am looking forward to receiving information on next steps.*



## PRE-BOARDING

*I am eager to get started; The Orientation Letter confirmed my position, unit, and details of my Orientation. The New Hire site makes everything very straightforward.*

## DAY 1 (OF ORIENTATION)

*I was able to complete the "Welcome to USPS" training without issue. The Orientation team was very helpful and well-coordinated.*



## WEEK 1

*There was lots to do this week, Onboarding Forms, Driver Training, and additional Orientation Training, but so far everything is going very smoothly.*

## 30 DAY

*My Supervisor has provided me with very clear feedback, and I was able to clarify my questions and expectations without issue.*



## WEEK 2

*I'm excited to finally take part in a Shadow Day and On the Job training to learn more about my job.*



## 60 DAY

*I'm glad I had the opportunity to improve since the previous review. My second review went exactly as I expected.*



## 90 DAY

*Finally! My last review went well, and I am a part of the team. The whole process went smoother than I expected.*



## 80 DAY

*I'm glad I had the opportunity to improve since the previous review. My third review went exactly as I expected.*



**NOTE: RCA/ARCs will end System Process at the end of Week 2**

**NOTE: Shadow Days only apply to newly hired city and rural carriers. If the Shadow Day is not applicable to a newly hired employee, you do not need to complete the action in the HR Onboarding Pilot System**

## Workflow – Pre-Boarding Tasks

### Send New Hire travel/booking information:

HR Representatives will use this task as a reminder to verify if the new hire will need to drive more than 50 miles to orientation training and if necessary, arrange accommodations.

HR Onboarding: Jia Saloni

Actions

JS

New Hire  
Jia Saloni

Effective Date  
2021-05-07

NS

Supervisor  
NH Supervisor

Employment Type  
Non-Career Employee

NHR

HR Rep  
NH HR Representative

Position  
City Carrier Assistant 2

NTL

Training Rep  
NH Training Lead

Location  
03049-HOLLIS-1367208

Tasks/To-Dos

Activity

Attachments

← Pre-Boarding

Send New Hire Travel & Booking info...

Overdue 4 days

Send New Hire Travel & Booking information if required

HRT0004964 Overdue 4 days

Attachments History

Ask a Question

If the New Hire needs to drive more than 50 miles to their Orientation Training, they may require accommodations. Coordinate with the New Hire to arrange accommodations, then send the New Hire their Travel & Booking Information for Orientation. You can mark as complete if no accommodations are needed or when the New Hire has been sent their travel & booking confirmation.

Send New Hire Travel & Booking information if required

Click on the Complete button to mark task as complete.

Complete

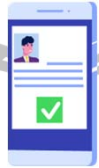
# Project Overview - USPS HR Onboarding Pilot Journey Map

*I accepted my offer am looking forward to receiving information on next steps.*



## PRE-BOARDING

*I am eager to get started; The Orientation Letter confirmed my position, unit, and details of my Orientation. The New Hire site makes everything very straightforward.*



## DAY 1 (OF ORIENTATION)

*I was able to complete the "Welcome to USPS" training without issue. The Orientation team was very helpful and well-coordinated.*



## WEEK 1

*There was lots to do this week, Onboarding Forms, Driver Training, and additional Orientation Training, but so far everything is going very smoothly.*

## 30 DAY

*My Supervisor has provided me with very clear feedback, and I was able to clarify my questions and expectations without issue.*



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*I'm excited to finally take part in a Shadow Day and On the Job training to learn more about my job.*



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*I'm glad I had the opportunity to improve since the previous review. My third review went exactly as I expected.*



**NOTE: RCA/ARCs will end System Process at the end of Week 2**

**NOTE: Shadow Days only apply to newly hired city and rural carriers. If the Shadow Day is not applicable to a newly hired employee, you do not need to complete the action in the HR Onboarding Pilot System**

## Workflow – Week 1 Tasks

### Determine if New Hire should be removed from rolls:

HR Representatives will use this task as a reminder to verify the continued employment of the New Hire and take any “outside-the-system” actions necessary if the New Hire separates from USPS.

HR Onboarding: Jia Saloni

Actions

JS

New Hire  
Jia Saloni

Effective Date  
2021-05-07

NS

Supervisor  
NH Supervisor

Employment Type  
Non-Career Employee

NHR

HR Rep  
NH HR Representative

Position  
City Carrier Assistant 2

NTL

Training Rep  
NH Training Lead

Location  
03049-HOLLIS-1367208

Tasks/To-Dos

Activity

Attachments

< Week 1

Determine if New Hire should be removed from rolls

Due in 3 days

Attachments

History

Ask a Question

This New Hire did not report for the first Day of Orientation and did not have an excused absence. Determine if the New Hire should be removed from the rolls. Note: Managers and Supervisors must inform the Human Resources Shared Service Center (HRSSC) about any direct reports who are separating (voluntarily or involuntarily). Instructions for processing separations can be found at <https://blue.usps.gov/hr/hrssc-info/separations/> and must be initiated and completed outside of this system. It is critical this process is handled correctly and timely therefore, the submission of separation documentation for processing should be handled immediately upon receipt, regardless of effective date. Once a separation has been initiated, select "Close Case due to Separation" from the Action menu above to close the New Hire's Onboarding Case.

Determine if New Hire should be removed from rolls

Click on the Complete button to mark task as complete.

Complete

# Project Overview - USPS HR Onboarding Pilot Journey Map

*I accepted my offer and am looking forward to receiving information on next steps.*



## PRE-BOARDING

*I am eager to get started; The Orientation Letter confirmed my position, unit, and details of my Orientation. The New Hire site makes everything very straightforward.*

## DAY 1 (OF ORIENTATION)

*I was able to complete the "Welcome to USPS" training without issue. The Orientation team was very helpful and well-coordinated.*



## WEEK 1

*There was lots to do this week, Onboarding Forms, Driver Training, and additional Orientation Training, but so far everything is going very smoothly.*



## 30 DAY

*My Supervisor has provided me with very clear feedback, and I was able to clarify my questions and expectations without issue.*

## WEEK 2

*I'm excited to finally take part in a Shadow Day and On the Job training to learn more about my job.*



## 60 DAY

*I'm glad I had the opportunity to improve since the previous review. My second review went exactly as I expected.*



## 90 DAY

*Finally! My last review went well, and I am a part of the team. The whole process went smoother than I expected.*



## 80 DAY

*I'm glad I had the opportunity to improve since the previous review. My third review went exactly as I expected.*



**NOTE: RCA/ARCs will end System Process at the end of Week 2**

**NOTE: Shadow Days only apply to newly hired city and rural carriers. If the Shadow Day is not applicable to a newly hired employee, you do not need to complete the action in the HR Onboarding Pilot System**



## Workflow – Day 30 Tasks

### Determine if New Hire should be removed from rolls:

HR Representatives will use this task as a reminder to verify the continued employment of the New Hire and take any “outside-the-system” actions necessary if the New Hire separates from USPS.

**NOTE:** RCAs/ARCs will be excluded from the scheduling and completion of automated PS Form 1750 evaluations at the 30, 60, and 80-Day reviews. They will continue to be evaluated using the same process used today and their reviews will not be captured within the HR Onboarding Pilot tool.

HR Onboarding: Jia Saloni

Actions

JS

New Hire  
Jia Saloni

Effective Date  
2021-05-07

NS

Supervisor  
NH Supervisor

Employment Type  
Non-Career Employee

NHR

HR Rep  
NH HR Representative

Position  
City Carrier Assistant 2

NTL

Training Rep  
NH Training Lead

Location  
03049-HOLLIS-1367208

Tasks/To-Dos

Activity

Attachments

< Day 30

Determine if New Hire should be rem...

Overdue 49 days

Determine if New Hire should be removed from rolls

HRT0004948 Overdue 49 days

Attachments History

Ask a Question

This New Hire was not recommended for Retention during their 30-day review. Determine if the New Hire should be removed from the rolls.

**Note:** Managers and Supervisors must inform the Human Resources Shared Service Center (HRSSC) about any direct reports who are separating (voluntarily or involuntarily). Instructions for processing separations can be found at <https://blue.usps.gov/hr/hrssc-info/separations/> and must be initiated and completed outside of this system. It is critical this process is handled correctly and timely therefore, the submission of separation documentation for processing should be handled immediately upon receipt, regardless of effective date.

Once a separation has been initiated, select "Close Case due to Separation" from the Action menu above to close the New Hire's Onboarding Case.

Determine if New Hire should be removed from rolls

Click on the Complete button to mark task as complete.

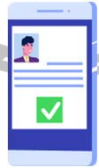
Complete

20



# Project Overview - USPS HR Onboarding Pilot Journey Map

*I accepted my offer and am looking forward to receiving information on next steps.*



## PRE-BOARDING

*I am eager to get started; The Orientation Letter confirmed my position, unit, and details of my Orientation. The New Hire site makes everything very straightforward.*

## DAY 1 (OF ORIENTATION)

*I was able to complete the "Welcome to USPS" training without issue. The Orientation team was very helpful and well-coordinated.*

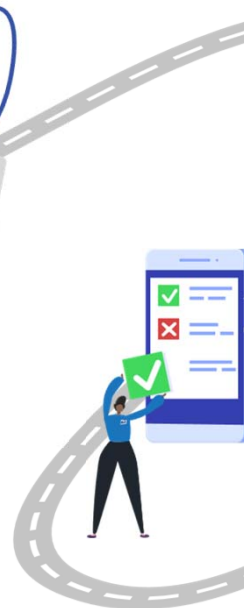


## WEEK 1

*There was lots to do this week, Onboarding Forms, Driver Training, and additional Orientation Training, but so far everything is going very smoothly.*

## 30 DAY

*My Supervisor has provided me with very clear feedback, and I was able to clarify my questions and expectations without issue.*



## WEEK 2

*I'm excited to finally take part in a Shadow Day and On the Job training to learn more about my job.*



## 60 DAY

*I'm glad I had the opportunity to improve since the previous review. My second review went exactly as I expected.*



## 80 DAY

*I'm glad I had the opportunity to improve since the previous review. My third review went exactly as I expected.*



## 90 DAY

*Finally! My last review went well, and I am a part of the team. The whole process went smoother than I expected.*



**NOTE: RCA/ARCs will end System Process at the end of Week 2**

**NOTE: Shadow Days only apply to newly hired city and rural carriers. If the Shadow Day is not applicable to a newly hired employee, you do not need to complete the action in the HR Onboarding Pilot System**

## Workflow – Day 60 Tasks

### Determine if New Hire should be removed from rolls:

HR Representatives will use this task as a reminder to verify the continued employment of the New Hire and take any “outside-the-system” actions necessary if the New Hire separates from USPS.

**NOTE:** RCAs/ARCs will be excluded from the scheduling and completion of automated PS Form 1750 evaluations at the 30, 60, and 80-Day reviews. They will continue to be evaluated using the same process used today and their reviews will not be captured within the HR Onboarding Pilot tool.

HR Onboarding: Jia Saloni

Actions

JS

New Hire  
Jia Saloni

Effective Date  
2021-05-07

NS

Supervisor  
NH Supervisor

Employment Type  
Non-Career Employee

NHR

HR Rep  
NH HR Representative

Position  
City Carrier Assistant 2

NTL

Training Rep  
NH Training Lead

Location  
03049-HOLLIS-1367208

Tasks/To-Dos

Activity

Attachments

< Day 60

Determine if New Hire should be removed from rolls

Overdue 19 days

Attachments

History

Ask a Question

This New Hire was not recommended for Retention during their 60-day review. Determine if the New Hire should be removed from the rolls.

**Note:** Managers and Supervisors must inform the Human Resources Shared Service Center (HRSSC) about any direct reports who are separating (voluntarily or involuntarily). Instructions for processing separations can be found at <https://blue.usps.gov/hr/hrssc-info/separations/> and must be initiated and completed outside of this system. It is critical this process is handled correctly and timely therefore, the submission of separation documentation for processing should be handled immediately upon receipt, regardless of effective date.

Once a separation has been initiated, select "Close Case due to Separation" from the Action menu above to close the New Hire's Onboarding Case.

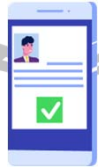
Determine if New Hire should be removed from rolls

Click on the Complete button to mark task as complete.

Complete

# Project Overview - USPS HR Onboarding Pilot Journey Map

*I accepted my offer am looking forward to receiving information on next steps.*



## PRE-BOARDING

*I am eager to get started; The Orientation Letter confirmed my position, unit, and details of my Orientation. The New Hire site makes everything very straightforward.*

## DAY 1 (OF ORIENTATION)

*I was able to complete the "Welcome to USPS" training without issue. The Orientation team was very helpful and well-coordinated.*

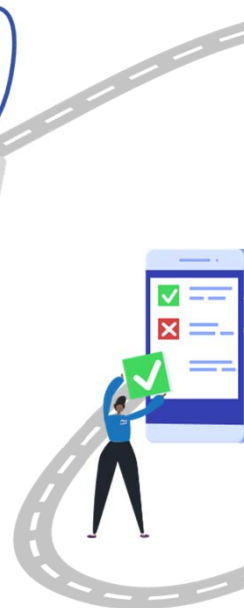


## WEEK 1

*There was lots to do this week, Onboarding Forms, Driver Training, and additional Orientation Training, but so far everything is going very smoothly.*

## 30 DAY

*My Supervisor has provided me with very clear feedback, and I was able to clarify my questions and expectations without issue.*



## WEEK 2

*I'm excited to finally take part in a Shadow Day and On the Job training to learn more about my job.*



## 60 DAY

*I'm glad I had the opportunity to improve since the previous review. My second review went exactly as I expected.*



## 90 DAY

*Finally! My last review went well, and I am a part of the team. The whole process went smoother than I expected.*

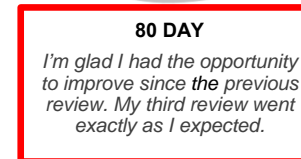


## 80 DAY

*I'm glad I had the opportunity to improve since the previous review. My third review went exactly as I expected.*



**NOTE: RCA/ARCs will end System Process at the end of Week 2**



**NOTE: Shadow Days only apply to newly hired city and rural carriers. If the Shadow Day is not applicable to a newly hired employee, you do not need to complete the action in the HR Onboarding Pilot System**

## Workflow – Day 80 Tasks

### Determine if New Hire should be removed from rolls:

HR Representatives will use this task as a reminder to verify the continued employment of the New Hire and take any “outside-the-system” actions necessary if the New Hire separates from USPS.

**NOTE:** RCAs/ARCs will be excluded from the scheduling and completion of automated PS Form 1750 evaluations at the 30, 60, and 80-Day reviews. They will continue to be evaluated using the same process used today and their reviews will not be captured within the HR Onboarding Pilot tool.

HR Onboarding: Jia Saloni

Actions

JS

New Hire  
Jia Saloni

Effective Date  
2021-05-07

NS

Supervisor  
NH Supervisor

Employment Type  
Non-Career Employee

NHR

HR Rep  
NH HR Representative

Position  
City Carrier Assistant 2

NTL

Training Rep  
NH Training Lead

Location  
03049-HOLLIS-1367208

Tasks/To-Dos

Activity

Attachments

< Day 80

Determine if New Hire should be removed from rolls

Due in 1 day

Determine if New Hire should be removed from rolls

HRT0004972 Due in 1 day

Attachments History

Ask a Question

This New Hire was not recommended for Retention during their 80-day review. Determine if the New Hire should be removed from the rolls.

**Note:** Managers and Supervisors must inform the Human Resources Shared Service Center (HRSSC) about any direct reports who are separating (voluntarily or involuntarily). Instructions for processing separations can be found at <https://blue.usps.gov/hr/hrssc-info/separations/> and must be initiated and completed outside of this system. It is critical this process is handled correctly and timely therefore, the submission of separation documentation for processing should be handled immediately upon receipt, regardless of effective date.

Once a separation has been initiated, select "Close Case due to Separation" from the Action menu above to close the New Hire's Onboarding Case.

Determine if New Hire should be removed from rolls

Click on the Complete button to mark task as complete.

Complete

# Module 4

## Initiating Separation

# Closing a ServiceNow HR Onboarding Case

The screenshot shows the ServiceNow HR Onboarding Case interface for Gerardo Li. The case details include: New Hire (GL), Gerardo Li; Supervisor (SS), SC Supervisor; HR Rep (SHR), SC HR Representative; Effective Date: 2021-10-19; Employment Type: Non-Career Employee; Position: MAIL M...; and a reference number 657. The 'Actions' menu is open, showing options: Close Onboarding Case, Send Email, Reassign Supervisor, Reassign HR Representative, and Reassign Training Lead. The 'Close Case' dialog box is displayed, containing the following text:

**Close Case**

Only proceed with taking the action if:

1. You want to stop the New Hire's Onboarding or the probationary period for this New Hire has ended.
2. You want to close the Onboarding case.

If you are closing this case due to separation...

This will not initiate a Separation request, follow the appropriate process outside this system to ensure the New Hire is removed from Rolls. Instructions for processing separations can be found at <https://blue.usps.gov/hr/hrssc-info/separations/>

Reason for Closing Case:

Voluntary Separation - New Hire Initiated

Additional Notes

Last day worked: 7/30/2021

☒ I confirm that a separation request has been initiated outside this system per the USPS guidelines, these details look correct and this onboarding case will be closed.

Cancel OK

**Closure Reason:**

When closing a case, the user must identify a reason. Provide additional high-level notes if "Other" is selected (example "Duplicate record").

## Auto-Close:

ServiceNow HR Onboarding cases for non-ARC/RCA's will close automatically at the end of the New Hire's probationary period.

## Manual Closure:

- 1) ServiceNow HR cases for ARC/RCA's must be closed manually after training is complete.
- 2) ServiceNow HR cases for any New Hire must be closed manually in the event of a separation from USPS.

# Module 5

## Communications

## Communication – Sending an Email

**HR Pilot users** can send an email to other HR Pilot users, through the case\*. The email will be tracked in the case notes.

The screenshot displays the 'HR Onboarding: Gerardo Li' case page. At the top, there are tabs for 'New Hire', 'Supervisor', 'HR Rep', and 'Training Lead'. Below these, fields for 'Effective Date' (2021-10-19), 'Employment Type' (Non-Career Employee), and 'Position' are visible. A 'Tasks/To-Dos' section on the left shows a timeline with 'Pre-Boarding', 'Day 1', 'Week 1', and 'Week 2'. A 'Compose Email' window is open in the foreground, showing fields for 'Reply to', 'To' (SC Training Lead; Add Recipient), 'Cc' (SC Supervisor; Add Recipient), 'Bcc' (Add Recipient), and 'Subject' (HRC0001309 - HR Onboarding: Doing Great!). The email body contains the text 'I just wanted to let you know that they have been doing a fantastic job! A+ hire!'. In the top right corner, an 'Actions' dropdown menu is open, with 'Send Email' highlighted. Other options in the menu include 'Close Onboarding Case', 'Reassign Supervisor', 'Reassign HR Representative', and 'Reassign Training Lead'.

**\*NOTE:** This feature should *ONLY* be used to communicate with other HR Pilot Users (Supervisors, Trainers, HR Representatives). This feature should *NOT* be used to communicate with the New Hires



## Communication – Updating ServiceNow HR Onboarding Case Notes

**HR Pilot users** can add notes to a case using the activity tab. For example, a Trainer and Supervisor might use these notes to coordinate on rescheduling training.

The screenshot displays the ServiceNow HR Onboarding case interface. At the top, the breadcrumb navigation shows 'Home' and 'My Request'. The case details include the Number 'HRC0001309', Created '9d ago', Updated '18h ago', and State 'Ready'. The case title is 'HR Onboarding: Gerardo Li'. Below this, a summary section lists key roles and details: New Hire Gerardo Li (Effective Date: 2021-10-19), Supervisor SC Supervisor (Employment Type: Non-Career Employee), HR Rep SC HR Representative (Position: MAIL HANDLER ASSISTANT), and Training Rep SC Training Lead (Location: 29037-CHAPPELLE-1357657). The main section has three tabs: 'Tasks/To-Dos', 'Activity' (which is selected and highlighted with a red box), and 'Attachments'. Below the 'Activity' tab, there is a text input field with the placeholder 'Type your message here...' and a 'Post' button, both highlighted with a red box. Below the input field, a message from 'SC Training Lead' is shown, stating: 'Messages posted on the activity tab will be saved to the case notes and can be seen by all user types!'. The message is timestamped 'just now' and includes a link for 'Additional comments'.

**NOTE:** These notes will not be emailed to user. They will only be kept in the activity tab ServiceNow HR Onboarding.

## Communication – Notes on System Generated Emails

### Automated/System Generated Emails

- Pre-defined, system generated emails will be sent to the HR Onboarding Pilot users throughout the Onboarding Process.
  - Emails to the New Hire will be sent to their personal email address.
  - **Emails will not be sent to the New Hire on or after their effective date.**
- Users can validate that these emails have been sent out via the Activity tab of the case.
- System generated emails will not be sent when a task is assigned:
  - New Hires will receive\* emails for certain orientations and trainings
  - Reminder emails will be sent to Supervisors when it is time to schedule certain meetings
  - Emails will be sent for tasks that have not been completed within two days of its due date

**\*NOTE:** *If the task is completed prior to the New Hire's effective date, a system generated email containing the relevant information will be sent. However, if the task is completed past the New Hire's effective date, no system generated email will be sent to the New Hire and it will be the responsibility of the Supervisor, Trainer, or HR Representative to communicate the relevant information to the New Hire outside the HR Onboarding Pilot system. Users should not send any email to the New Hire from the system after the New Hire's effective date.*

# Module 6

## Reassigning a Case

## Reassigning a Case

**HR Pilot users** can reassign a set of tasks of a case to a new user

**Tasks are assigned to one of three types of users:**

- 1) Supervisors
- 2) HR Representatives
- 3) Training Leads

The screenshot displays the 'HR Onboarding: Gerardo Li' interface. At the top, there are four user roles: GL (New Hire Gerardo Li), SS (Supervisor SC Supervisor), SHR (HR Rep SC HR Representative), and STL (Training Rep SC Training Lead). Below this, a 'Tasks/To-Dos' section shows a timeline with tasks: Pre-Boarding, Day 1, Week 1, Week 2 (highlighted), Day 30, Day 60, and Day 80. A modal window titled 'Select User to Reassign' is open, showing a 'Select User:' dropdown menu with 'NH HR Representative' selected. A 'Submit' button is visible in the bottom right of the modal. In the top right corner, an 'Actions' dropdown menu is open, listing options: 'Close Onboarding Case', 'Send Email', 'Reassign Supervisor', 'Reassign HR Representative', and 'Reassign Training Lead'. Red boxes highlight the 'Actions' dropdown, the 'Reassign HR Representative' option, the 'NH HR Representative' selection in the modal, and the 'Submit' button.

# Module 7

Submitting a Support Request

# Submitting a Support Request

**HR Pilot users** can submit a support request

**The following information is required to create a support request:**

- 1) District
- 2) Support Type
- 3) Opened For
- 4) Short Description
- 5) Description

The screenshot shows the 'HR Portal IT Support Request' form. At the top right, there is a navigation bar with 'To-dos 496', 'Requests', and 'Support Requests' (highlighted with a red box and a circled '1'). Below 'Support Requests' is a button 'Submit a Support Request' (highlighted with a red box and a circled '2') and a link 'My Support Requests'. The main form area has a title 'HR Portal IT Support Request' and a subtitle 'Ask a question about the HR portal'. A red box highlights the form fields, with a circled '3' pointing to the 'Opened for' field. The fields are: '\* Select District' (dropdown menu showing 'ME-NH-VT'), '\* Support Type' (dropdown menu showing 'Supervisor'), '\* Opened for' (dropdown menu showing 'Brock Sizer'), '\* Short Description' (text area with 'Can't see New Hire - John Doe'), and '\* Description' (text area with 'When searching for my New Hire via the My Requests page, my New Hire, John Doe, does not appear in the list.'). At the bottom right of the form is a button 'Submit' (highlighted with a red box and a circled '4') and a link 'Add attachments'.

# Module 8

Labs/Activities

## Lab / Activities

Lab/ Activity #	Topic Covered	Est. Time (min)
1.	Portal (Homepage widgets, My Requests Page, My To-Dos Page, My Team Page, Helpful Links, Training Widget (High Level ONLY))	10
2.	Dashboard (Navigating to Dashboard, Dashboard tabs, Dashboard filters)	5
3.	Reporting (Running/Creating) ad-hoc reports	5
4.	Pre-Boarding Tasks (Send New Hire Travel & Booking Information)	5
5.	Week 1 Tasks (Remove New Hire from Rolls if Applicable)	5
6.	Day 30 Tasks (Remove New Hire from Rolls if Applicable)	5
7.	Day 60 Tasks (Remove New Hire from Rolls if Applicable)	5
8.	Day 80 Tasks (Remove New Hire from Rolls if Applicable)	5
9.	Closing a ServiceNow HR Onboarding cases	5
10.	Communications (Creating quick messages & using them from Actions UI)	10
11.	Reassignment	5
12.	Submitting a Support Request	5



## Lab 1 – Onboarding Portal

1. **Navigate to the HR Onboarding Portal** (<https://guspsonboarding.servicenowservices.com/onboarding>)
2. **Click through the different widgets on the homepage to familiarize yourself with the portal**
  1. Search for New Hires through the search bar on the homepage
  2. Click into 'My Requests' and 'My To-Dos' to familiarize yourself with the layout of the tasks/activities assigned to the logged in user
  3. Click into 'My Teams' to better understand the team structure of the logged in user

**NOTE:** Direct reports and managers may not be visible to all users as the data is not available in the HR Onboarding Pilot system

  4. Click into Helpful Links to view resources available to aid in the Onboarding process

## Lab 2 – Dashboard

1. **Navigate to the HR Onboarding Portal (<https://quspsonboarding.servicenowservices.com/onboarding>) and click 'View All Reports' under 'My Overview' to navigate to the HR Onboarding Dashboard**
2. **Click the Active HR Cases tab and familiarize yourself with the displayed reports:**
  1. Active Cases Count (Number)
  2. Cases by HR Service
  3. HR Service Table
  4. HR Onboarding Cases by Activity Set
  5. RCA/ARC Cases by Activity Set
  6. All Active Cases
  7. NOTE: Try changing the filter conditions to see how the reports are updated based on defined criteria
3. **Click the Active To Dos tab and familiarize yourself with the displayed reports:**
  1. Active To-Dos Count (Number)
  2. Active To-Dos
  3. NOTE: Try changing the filter conditions to see how the reports are updated based on defined criteria

## Lab 3 – Reporting

1. **Navigate to the HR Onboarding Portal (<https://quspsonboarding.servicenowservices.com/onboarding>) and click ‘View All Reports’ under ‘My Overview’ to navigate to the backend view of the HR Onboarding Pilot system.**
2. **Type ‘Reporting’ in the filter navigator to navigate to HR Dashboard & Reports > Reports**
3. **Click through the different tabs to familiarize yourself with the different reports available for you to view in the HR Onboarding Pilot system**
  1. My Reports: Reports created by the logged in user
  2. Group: Reports shared with the logged in user via group or user
  3. Global: Reports that are shared as global
  4. All: All reports accessible by the logged in user
4. **Create a new report using the ‘Create a Report’ button**
  1. Data: Choose a name for the report, select ‘Table’ for data source, and select ‘HR Lifecycle Event Cases’ OR ‘HR Tasks’ to generate a report for the HR Onboarding Pilot data
  2. Type: Select a type of report you would like to use to display the data (e.g., Pie Chart, Bar Graph, etc.)
  3. Configure: Select how you would like to group the data
  4. Style: Update the color palette, size, and format
5. **Click ‘Run’ to generate the report. Make changes as needed and click ‘Save’ to save the report.**
6. **Click ‘Share’ to share the report with a specific group or user.**

## Lab 4 – Pre-Boarding Tasks

1. **Navigate to the HR Onboarding Portal (<https://quspsonboarding.servicenowservices.com/onboarding>) and click 'My Requests' to view a list of all open HR Onboarding Requests**
2. **Select a request that is not closed or cancelled. Once the request is displayed, click the 'Pre-Boarding' link under the timeline to view all tasks. Select 'Assigned to Me' under the drop-down in the center of the page. The following tasks will be displayed:**
  1. Send New Hire travel/booking information
3. **Click 'Send New Hire travel/booking information' task**
  1. Read the information provided
  2. Take any 'outside-the-system' actions necessary
  3. Click 'Submit' to confirm the task is complete
4. **Select 'Assigned to Me' under the drop-down in the center of the page. No tasks should be displayed**

## Lab 5 – Week 1 Tasks

1. **Navigate to the HR Onboarding Portal (<https://quspsonboarding.servicenowservices.com/onboarding>) and click 'My Requests' to view a list of all open HR Onboarding Requests**
2. **Select a request that is not closed or cancelled. Once the request is displayed, click the 'Week 1' link under the timeline to view all tasks. Select 'Assigned to Me' under the drop-down in the center of the page. The following tasks will be displayed:**
  1. Determine if New Hire should be removed from rolls
3. **Click 'Determine if New Hire should be removed from rolls' task**
  1. Read the information provided
  2. Take any 'outside-the-system' actions necessary
  3. Click 'Submit' to confirm the task is complete
4. **Select 'Assigned to Me' under the drop-down in the center of the page. No tasks should be displayed**

## Lab 6 – Day 30 Tasks

1. **Navigate to the HR Onboarding Portal (<https://quspsonboarding.servicenowservices.com/onboarding>) and click 'My Requests' to view a list of all open HR Onboarding Requests**
2. **Select a request that is not closed or cancelled. Once the request is displayed, click the 'Day 30' link under the timeline to view all tasks. Select 'Assigned to Me' under the drop-down in the center of the page. The following tasks will be displayed:**
  1. Determine if New Hire should be removed from rolls
3. **Click 'Determine if New Hire should be removed from rolls' task**
  1. Read the information provided
  2. Take any 'outside-the-system' actions necessary
  3. Click 'Submit' to confirm the task is complete
4. **Select 'Assigned to Me' under the drop-down in the center of the page. No tasks should be displayed**

## Lab 7 – Day 60 Tasks

1. **Navigate to the HR Onboarding Portal (<https://quspsonboarding.servicenowservices.com/onboarding>) and click 'My Requests' to view a list of all open HR Onboarding Requests**
2. **Select a request that is not closed or cancelled. Once the request is displayed, click the 'Day 60' link under the timeline to view all tasks. Select 'Assigned to Me' under the drop-down in the center of the page. The following tasks will be displayed:**
  1. Determine if New Hire should be removed from rolls
3. **Click 'Determine if New Hire should be removed from rolls' task**
  1. Read the information provided
  2. Take any 'outside-the-system' actions necessary
  3. Click 'Submit' to confirm the task is complete
4. **Select 'Assigned to Me' under the drop-down in the center of the page. No tasks should be displayed**

## Lab 8 – Day 80 Tasks

1. **Navigate to the HR Onboarding Portal (<https://quspsonboarding.servicenowservices.com/onboarding>) and click 'My Requests' to view a list of all open HR Onboarding Requests**
2. **Select a request that is not closed or cancelled. Once the request is displayed, click the 'Day 80' link under the timeline to view all tasks. Select 'Assigned to Me' under the drop-down in the center of the page. The following tasks will be displayed:**
  1. Determine if New Hire should be removed from rolls
3. **Click 'Determine if New Hire should be removed from rolls' task**
  1. Read the information provided
  2. Take any 'outside-the-system' actions necessary
  3. Click 'Submit' to confirm the task is complete
4. **Select 'Assigned to Me' under the drop-down in the center of the page. No tasks should be displayed**



## Lab 9 – Closing a ServiceNow HR Onboarding cases

1. **Navigate to the HR Onboarding Portal (<https://quspsonboarding.servicenowservices.com/onboarding>) and click 'My Requests' to view a list of all open HR Onboarding Requests**
2. **Select a request that is not closed or cancelled.**
3. **Click the 'Actions' button on the HR case view. The drop-down is expanded and the following values are displayed:**
  1. Send Email
  2. Close Onboarding Case
  3. Reassign Supervisor
  4. Reassign HR Representative
  5. Reassign Training Lead
4. **Click 'Close Onboarding Case'**
  1. Populate the mandatory fields (indicated by red \*)
  2. For Reason of Cancellation, select 'Voluntary Separation - New Hire Initiated' OR 'Involuntary Separation - Employer Initiated'
  3. Read the confirmation statement and check the checkbox
  4. Click 'Close Case'
5. **Click 'Activity' tab near middle of page to confirm an entry was added to indicate Case Closure email was sent to the HR Rep**

## Lab 10 – Communication

1. **Navigate to the HR Onboarding Portal (<https://quspsonboarding.servicenowservices.com/onboarding>) and click 'View All Reports' under 'My Overview' to navigate to the HR Onboarding Dashboard**
2. **Type 'Quick Messages' in the filter navigator**
  1. Select Email Client > Quick Messages
  2. Click 'New'
  3. Populate the mandatory fields, make sure the 'active' field is checked and the table field is populated with 'HR Lifecycle Events Case', and click 'Submit'
3. **Navigate to the HR Onboarding Portal (<https://quspsonboarding.servicenowservices.com/onboarding>) and click 'My Requests' to view a list of all open HR Onboarding Requests**
4. **Select a request that is not closed or cancelled.**
5. **Click the 'Actions' button on the HR case view. The drop-down is expanded and the following values are displayed:**
  1. Send Email
  2. Close Onboarding Case
  3. Reassign Supervisor
  4. Reassign HR Representative
  5. Reassign Training Lead
6. **Click 'Send Email'**
  1. Click the Quick Messages drop-down on top right
  2. Populate the 'To' field and click 'Send'
7. **Click 'Activity' tab near middle of page to confirm an entry was added to indicate the email was sent**

## Lab 11 – Reassignment

1. **Navigate to the HR Onboarding Portal (<https://quspsonboarding.servicenowservices.com/onboarding>) and click ‘My Requests’ to view a list of all open HR Onboarding Requests**
2. **Select a request that is not closed or cancelled.**
3. **Click the ‘Actions’ button on the HR case view. The drop-down is expanded and the following values are displayed:**
  1. Send Email
  2. Close Onboarding Case
  3. Reassign Supervisor
  4. Reassign HR Representative
  5. Reassign Training Lead
4. **Click ‘Reassign HR Representative’**
  1. Select a user to reassign as HR Representative on the case
  2. Click ‘Save’

## Lab 12 – Submitting a Support Request

1. **Navigate to the HR Onboarding Portal (<https://quspsonboarding.servicenowservices.com/onboarding>) and click 'My Support Requests' on the top right**
2. **Select a 'Submit a Support Request'**
3. **Populate the mandatory fields (indicated by the red \*)**
4. **Click 'Submit'**

# HR Onboarding Pilot

Supervisor

## Expectations: Before We Begin

T<sup>3</sup> O<sup>1</sup>

D<sup>3</sup> O<sup>1</sup>

- Be engaged.
- Ask questions in the chat.
- Please mute your phones/microphones.
- Please do NOT place us on hold/multitask.
- This is your training!

## Objective & Goals

- By the end of the training session, users will be familiar with the following functionality as it pertains to their role in the HR Onboarding Pilot:
  - How to access and navigate the different widgets on the HR Onboarding Pilot Supervisor Portal
  - How to access and monitor the HR Onboarding Dashboard
  - How to access and report on a list of ALL Onboarding cases
  - How to access and take action on tasks assigned to Supervisor in the Onboarding Lifecycle Event (e.g. schedule shadow day/report to duty station, complete probationary reviews, etc.)
  - Form 1750 automation
  - How to initiate reassignment of the Supervisor associated to an Onboarding case
  - How to monitor communications (e.g. work notes and emails) associated to HR Onboarding cases
  - How to communicate with new hire, HR Representative, and Training Leads from the system via direct messages (emails)
  - How to communicate with Training Lead, HR Representative, and other Supervisors through work notes and comment on the HR case
  - How to create and access quick messages

## Course Modules

Module	Topic Covered	Est. Time (min)
1.	Portal (Homepage widgets, My Requests Page, My To-Dos Page, My Team Page, Helpful Links)	5
2.	Dashboard & Reporting (Navigating to Dashboard, Dashboard tabs, Dashboard filters)	5
3.	Workflow	30
	3.1 Day 1 Tasks	
	3.2 Week 1 Tasks	
	3.3 Week 2 Tasks	
	3.4 Day 30 Tasks	
	3.5 Day 60 Tasks	
	3.6 Day 80 Tasks	
4.	Cancelling a case	5
5.	Communications (Creating quick messages & using them from Actions UI)	10
6.	Reassignment	5
7.	Submitting a Support Request	5






## Project Overview – HR Onboarding Pilot

### Project Overview

The HR Onboarding Pilot's goal is to create standardized, repeatable, and automated workflows and processes for onboarding procedures and probationary activities for two pilot districts (Maine-New Hampshire-Vermont and South Carolina) for non-career and bargaining positions. It will support automated, electronic means for action and milestone tracking while increasing visibility for the managers and HR professionals tasked with delivering the appropriate communications, training, and performance feedback for new hires.

### Timeline

FY21		FY22					
	SEP	OCT		NOV		DEC	
Pilot Training (9/7-16)							
Pilot (9/17 – 12/31)							
Analyze Results and Feedback							

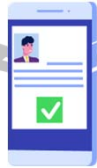
# Project Overview - USPS HR Onboarding Pilot Journey Map

*I accepted my offer am looking forward to receiving information on next steps.*



## PRE-BOARDING

*I am eager to get started; The Orientation Letter confirmed my position, unit, and details of my Orientation. The New Hire site makes everything very straightforward.*



## DAY 1 (OF ORIENTATION)

*I was able to complete the "Welcome to USPS" training without issue. The Orientation team was very helpful and well-coordinated.*



## WEEK 1

*There was lots to do this week, Onboarding Forms, Driver Training, and additional Orientation Training, but so far everything is going very smoothly.*

## 30 DAY

*My Supervisor has provided me with very clear feedback, and I was able to clarify my questions and expectations without issue.*



## WEEK 2

*I'm excited to finally take part in a Shadow Day and On the Job training to learn more about my job.*



## 60 DAY

*I'm glad I had the opportunity to improve since the previous review. My second review went exactly as I expected.*



## 90 DAY

*Finally! My last review went well, and I am a part of the team. The whole process went smoother than I expected.*



## 80 DAY

*I'm glad I had the opportunity to improve since the previous review. My third review went exactly as I expected.*



**NOTE: RCA/ARCs will end System Process at the end of Week 2**

**NOTE: Shadow Days only apply to newly hired city and rural carriers. If the Shadow Day is not applicable to a newly hired employee, you do not need to complete the action in the HR Onboarding Pilot System**

## Supervisor Roles & Responsibilities



SUPERVISORS MANAGE  
THE NEW HIRE DURING  
DAY-TO-  
DAY OPERATIONS



SET THE SCHEDULE FOR  
NEW HIRE'S  
ONBOARDING



MANAGE WORK  
EXPECTATIONS FOR THE  
NEW HIRE



RESPONSIBLE FOR  
COMPLETING THE  
30/60/80-DAY  
REVIEWS/PAPERWORK  
WITH THE NEW HIRE AND  
FOR



COORDINATING WITH HR  
LOCAL SERVICES  
REGARDING  
RECOMMENDATIONS FOR  
RETENTION OR RELEASE

# Module 1

## Portal Overview

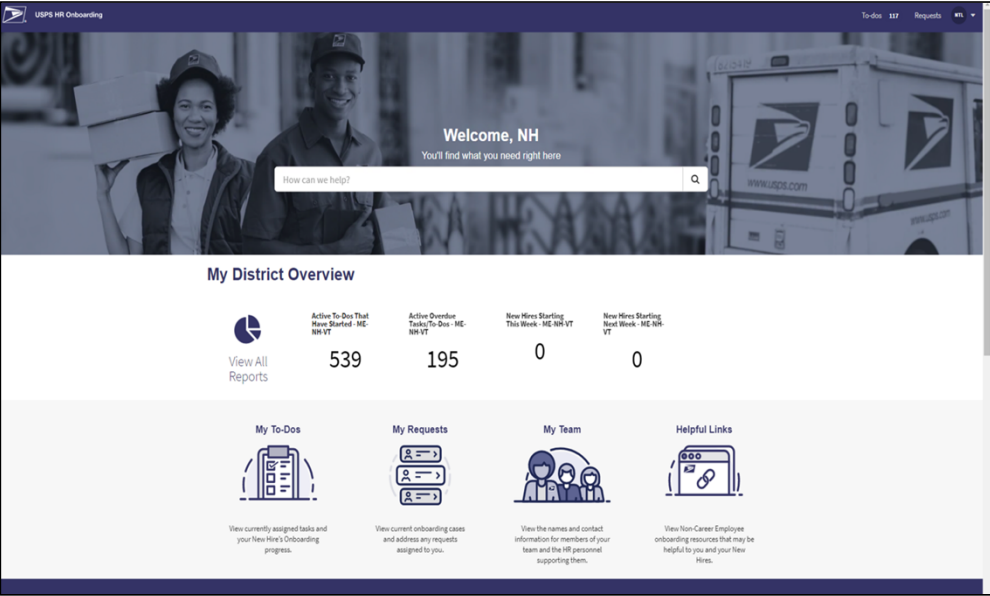
## Portal – URL and Access

- **Environment URL and Access:**
  - Onboarding Portal
    - CAT URL: <https://quspsonboarding.servicenowservices.com/onboarding>
    - PROD URL: <https://uspsonboarding.servicenowservices.com/onboarding>
  - Training Portal
    - CAT URL: <https://quspsonboarding.servicenowservices.com/training>
    - PROD URL: <https://uspsonboarding.servicenowservices.com/training>
- All HR Pilot users will have access prior to go-live. However, if users need access to the system after go-live, they can request access following these steps:
  - To request access, email the HR coordinators. HR Coordinators will submit a Support Request in the HR Onboarding Pilot system. The HR Onboarding Pilot Tier 2 team will grant access and notify the HR coordinators. HR Coordinators will notify the users.

# Portal

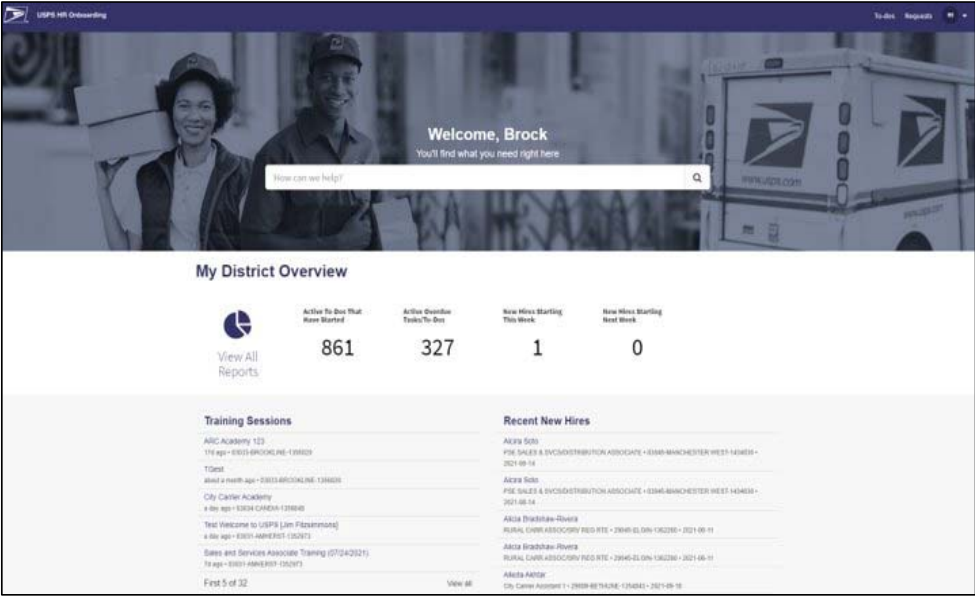
## Onboarding Portal

Supervisors will access the Pilot through the Onboarding Portal



## Training Portal

Trainers and HR Representatives will access the Pilot through the Training Portal



# Module 2

## Dashboard & Reporting

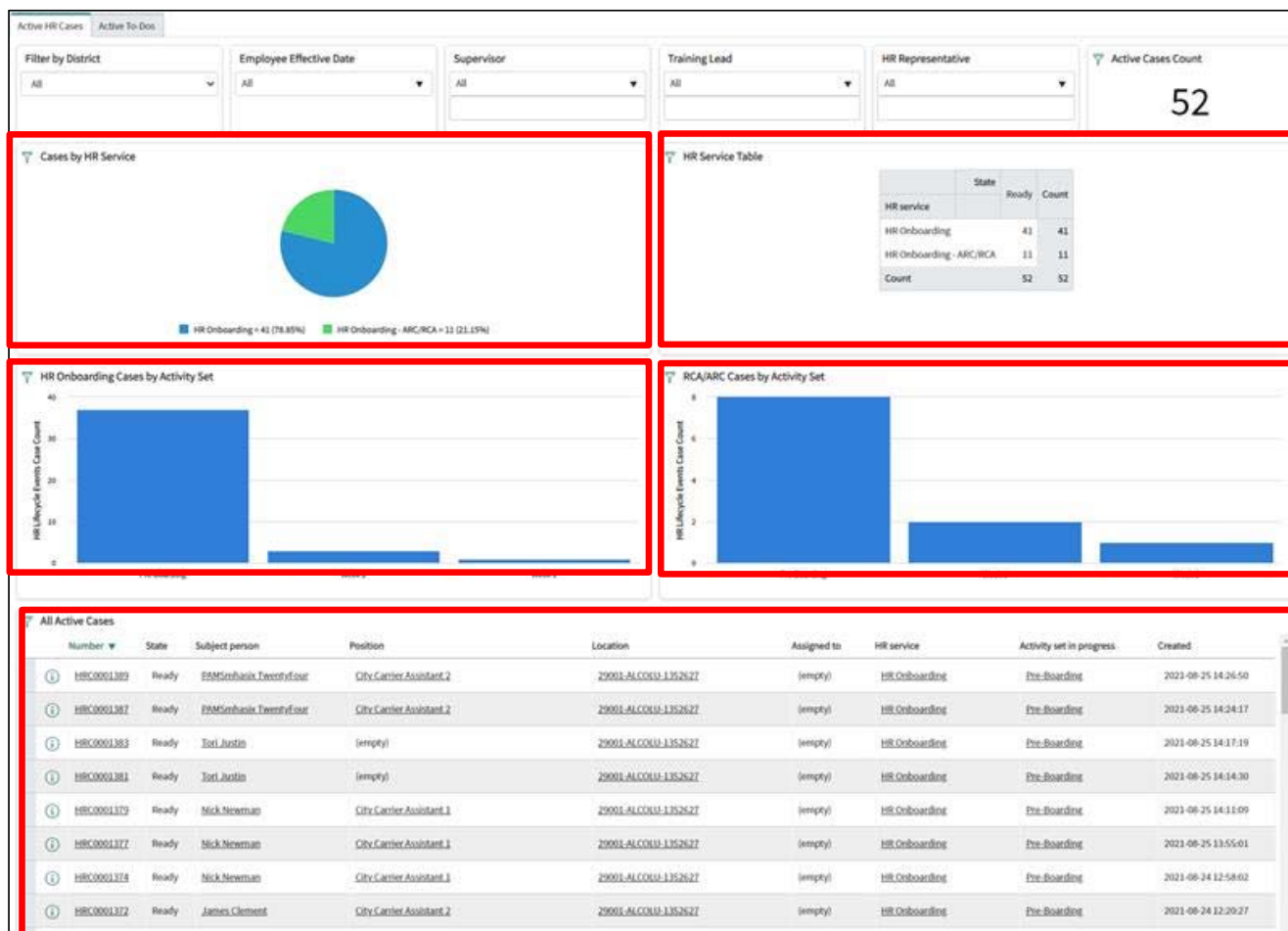
# Dashboard & Reporting – Active HR Cases

## • Metrics

- Active Cases Count (Number)
- Cases by HR Service
- HR Service Table
- Onboarding Cases by Activity Set
- RCA/ARC Cases by Activity Set
- All Active Cases

## • Filters

- District
- Employee Effective Date
- Supervisor
- HR Representative
- Training Lead





## Dashboard & Reporting – Active To-Dos

- **Metrics/Reports**

- Active To-Dos That Have Started
- All Active To-Dos

- **Filters**

- District
- Employee Effective Date
- Assigned To
- Due Date

Active HR Cases

Active To-Dos

Filter To-Dos by District

All

Assigned to

All

Employee Effective Date

All

Due Date

Last 7 days

Active To-Dos That Have Started

458

Active To-Dos

Number	Parent	Subject person	Short description	Position	Location	State	Assigned to	Due date
① HRT0004799	HRC0001315	Lisa Samuel	Enter ratings and generate 60-day review form	City Carrier Assistant 1	03033-BROOKLINE-1356020	Ready	NH Supervisor	2021-07-23 00:00:00
① HRT0004797	HRC0001315	Lisa Samuel	Determine if New Hire should be removed from rolls	City Carrier Assistant 1	03033-BROOKLINE-1356020	Ready	NH HR Representative	2021-07-23 00:00:00
① HRT0004800	HRC0001315	Lisa Samuel	Participate in 60 Day Review	City Carrier Assistant 1	03033-BROOKLINE-1356020	Ready	Lisa Samuel	2021-07-23 00:00:00
① HRT0004786	HRC0001315	Lisa Samuel	Schedule 80-Day Review	City Carrier Assistant 1	03033-BROOKLINE-1356020	Ready	NH Supervisor	2021-07-23 00:00:00
① HRT0004798	HRC0001315	Lisa Samuel	Conduct 60-Day Review	City Carrier Assistant 1	03033-BROOKLINE-1356020	Ready	NH Supervisor	2021-07-23 00:00:00
① HRT0003961	HRC0001249	Martha Gamblin	Prepare for Orientation	ASSISTANT RURAL CARRIER (ARC)	29041-DAVIS STATION-1437129	Ready	Martha Gamblin	2021-07-23 18:52:14
① HRT0003984	HRC0001251	Alleda Akhtar	Contact New Hire regarding job requirements	City Carrier Assistant 1	29009-BETHUNE-1354843	Ready	SC Supervisor	2021-07-23 18:52:20
① HRT0003965	HRC0001251	Alleda Akhtar	Prepare for Orientation	City Carrier Assistant 1	29009-BETHUNE-1354843	Ready	Alleda Akhtar	2021-07-23 18:52:20
① HRT0003979	HRC0001251	Alleda Akhtar	Send New Hire Travel & Booking information if required	City Carrier Assistant 1	29009-BETHUNE-1354843	Ready	SC HR Representative	2021-07-23 18:52:20
① HRT0003978	HRC0001251	Alleda Akhtar	Enter Report to Unit/Duty Station Details	City Carrier Assistant 1	29009-BETHUNE-1354843	Ready	SC Supervisor	2021-07-23 18:52:25

**NOTE:** HR Onboarding Pilot fulfiller users (Supervisors, Trainers, HR Representatives) can create their own reports and share the report with specific users and/or groups. Instructions in the corresponding Lab.

# Module 3

Workflow

# Project Overview - USPS HR Onboarding Pilot Journey Map

*I accepted my offer am looking forward to receiving information on next steps.*



## DAY 1 (OF ORIENTATION)

*I was able to complete the "Welcome to USPS" training without issue. The Orientation team was very helpful and well-coordinated.*

## WEEK 2

*I'm excited to finally take part in a Shadow Day and On the Job training to learn more about my job.*

**NOTE: RCA/ARCs will end System Process at the end of Week 2**

## PRE-BOARDING

*I am eager to get started; The Orientation Letter confirmed my position, unit, and details of my Orientation. The New Hire site makes everything very straightforward.*

## WEEK 1

*There was lots to do this week, Onboarding Forms, Driver Training, and additional Orientation Training, but so far everything is going very smoothly.*

## 30 DAY

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## 80 DAY

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**NOTE: Shadow Days only apply to newly hired city and rural carriers. If the Shadow Day is not applicable to a newly hired employee, you do not need to complete the action in the HR Onboarding Pilot System**

## Workflow – Activity Sets

### Activity Sets:

Depict the stages of the onboarding process, they can include:

- **Pre-Boarding**
- **Day 1**
- **Week 1**
- **Week 2**
- **Day 30**
- **Day 60**
- **Day 80**

**Note:** ARCs/RCA's will not have Day 30, 60, or 80 Activity Sets

HR Onboarding: Gerardo Li

Actions ▾

GL New Hire Gerardo Li SS Supervisor SC Supervisor SHR HR Rep SC HR Representative STL Training Rep SC Training Lead

Effective Date 2021-10-19 Employment Type Non-Career Employee Position MAIL HANDLER ASSISTANT Location 29037-CHAPPELLS-1357657

Tasks/To-Dos Activity Attachments

Timeline

- ✓ Pre-Boarding
- ✓ Day 1
- ✓ Week 1
- Week 2
- Day 30
- Day 60
- Day 80

Week 2 4/6 completed

All (2) ▾ ☐ Show completed to-dos ☐ Show upcoming to-dos

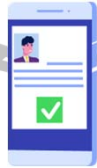
Participate in Initial Meeting with Supervisor Due in 7 days

Determine if New Hire should be removed from rolls Due in 7 days

☐ View all to-dos

# Project Overview - USPS HR Onboarding Pilot Journey Map

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**NOTE: RCA/ARCs will end System Process at the end of Week 2**

**NOTE: Shadow Days only apply to newly hired city and rural carriers. If the Shadow Day is not applicable to a newly hired employee, you do not need to complete the action in the HR Onboarding Pilot System**

## Workflow – Preboarding Tasks

### Schedule Report to Duty Station:

Supervisors will use this task to schedule the date a New Hire has to report to their duty station. Once the task is marked complete by the Supervisor, an email is sent to the New Hire with the information to prepare for reporting to their duty station including the date and location

**NOTE:** If the task is completed prior to the New Hire's effective date, a system generated email containing the relevant information will be sent. However, if the task is completed past the New Hire's effective date, no system generated email will be sent to the New Hire and it will be the responsibility of the Supervisor to communicate the relevant information to the New Hire outside the HR Onboarding Pilot system

HR Onboarding: Jia Saloni

Actions ▾

New Hire: Jia Saloni  
Effective Date: 2021-05-07

Supervisor: NH Supervisor  
Employment Type: Non-Career Employee

HR Rep: NH HR Representative  
Position: City Carrier Assistant 2

Training Rep: NH Training Lead  
Location: 03049-HOLLIS-1367208

Tasks/To-Dos Activity Attachments

Pre-Boarding

Contact New Hire regarding job requi...  
Overdue 3 days

Enter Report to Unit/Duty Station Det...  
Overdue 3 days

Enter Report to Unit/Duty Station Details  
HRT0004963 Overdue 3 days

Attachments History Ask a Question

HRT0004963 Unit/Duty Station Schedule

\*Date  
[Date Picker]

\*Location  
[Location Dropdown]

Cancel Save Submit

## Workflow – Preboarding Tasks

### Supervisor Checklist:

A checklist is available for Supervisors through this task outlining what needs to be discussed with the New Hire when Supervisors contact them for job requirements

The screenshot displays the 'HR Onboarding: Jia Saloni' interface. At the top, there are four user cards: 'New Hire Jia Saloni' (Effective Date: 2021-05-07), 'Supervisor NH Supervisor' (Employment Type: Non-Career Employee), 'HR Rep NH HR Representative' (Position: City Carrier Assistant 2), and 'Training Rep NH Training Lead' (Location: 03049-HOLLIS-1367208). Below these are tabs for 'Tasks/To-Dos', 'Activity', and 'Attachments'. The 'Pre-Boarding' task is selected, showing a list of tasks. The task 'Contact New Hire regarding job requirements' (ID: HRT0004969, Overdue 3 days) is highlighted with a red box. To the right of this task, there is a detailed view of the task, also outlined in red. This view includes contact information for Jia Saloni (Name, Phone, Email) and a 'Supervisor Checklist' with the following items: Initial work assignment, Job, duties, roles, and responsibilities, Performance expectations, Work hours, Probationary period guidelines, Time and Attendance Control System (TACS), Leave guidelines and requests/eRMS (PS Form 3971), Introduction to coworkers and key contacts, USPS National Emergency Hotline number, and Supply requests. At the bottom of this view is a 'Complete' button.

HR Onboarding: Jia Saloni

Actions

New Hire Jia Saloni  
Effective Date  
2021-05-07

Supervisor NH Supervisor  
Employment Type  
Non-Career Employee

HR Rep NH HR Representative  
Position  
City Carrier Assistant 2

Training Rep NH Training Lead  
Location  
03049-HOLLIS-1367208

Tasks/To-Dos Activity Attachments

Pre-Boarding

Contact New Hire regarding job requirements  
HRT0004969 Overdue 3 days

Attachments History

Ask a Question

Contact your New Hire to welcome them to USPS and review their job requirements - including work hours, days off and approximate

Contact Information:  
Name: Jia Saloni  
Phone:  
Email:

Supervisor Checklist

- Initial work assignment
- Job, duties, roles, and responsibilities
- Performance expectations
- Work hours
- Probationary period guidelines
- Time and Attendance Control System (TACS)
- Leave guidelines and requests/eRMS (PS Form 3971)
- Introduction to coworkers and key contacts
- USPS National Emergency Hotline number
- Supply requests

Contact New Hire regarding job requirements  
Click on the Complete button to mark task as complete.

Complete

# Project Overview - USPS HR Onboarding Pilot Journey Map

*I accepted my offer and am looking forward to receiving information on next steps.*



## PRE-BOARDING

*I am eager to get started; The Orientation Letter confirmed my position, unit, and details of my Orientation. The New Hire site makes everything very straightforward.*



## DAY 1 (OF ORIENTATION)

*I was able to complete the "Welcome to USPS" training without issue. The Orientation team was very helpful and well-coordinated.*



## WEEK 1

*There was lots to do this week, Onboarding Forms, Driver Training, and additional Orientation Training, but so far everything is going very smoothly.*

## 30 DAY

*My Supervisor has provided me with very clear feedback, and I was able to clarify my questions and expectations without issue.*



## WEEK 2

*I'm excited to finally take part in a Shadow Day and On the Job training to learn more about my job.*



## 60 DAY

*I'm glad I had the opportunity to improve since the previous review. My second review went exactly as I expected.*



## 90 DAY

*Finally! My last review went well, and I am a part of the team. The whole process went smoother than I expected.*



## 80 DAY

*I'm glad I had the opportunity to improve since the previous review. My third review went exactly as I expected.*



**NOTE: RCA/ARCs will end System Process at the end of Week 2**

**NOTE: Shadow Days only apply to newly hired city and rural carriers. If the Shadow Day is not applicable to a newly hired employee, you do not need to complete the action in the HR Onboarding Pilot System**



## Workflow – Day 1 Tasks

### Schedule Shadow Day:

If applicable Supervisors can use this task to schedule the date a New Hire has to attend Shadow Day. Once the task is marked complete by the Supervisor, an email is sent to the New Hire with the information to prepare for Shadow Day including the date and location

**NOTE:** If the task is completed prior to the New Hire's effective date, a system generated email containing the relevant information will be sent. However, if the task is completed past the New Hire's effective date, no system generated email will be sent to the New Hire and it will be the responsibility of the Supervisor to communicate the relevant information to the New Hire outside the HR Onboarding Pilot system

The screenshot displays the 'HR Onboarding: Jia Saloni' interface. At the top, there are four profile cards: 'New Hire Jia Saloni' (Effective Date: 2021-05-07), 'Supervisor NH Supervisor' (Employment Type: Non-Career Employee), 'HR Rep NH HR Representative' (Position: City Carrier Assistant 2), and 'Training Rep NH Training Lead' (Location: 03049-HOLLIS-1367208). Below these are tabs for 'Tasks/To-Dos', 'Activity', and 'Attachments'. The 'Tasks/To-Dos' tab is active, showing a list of tasks. One task, 'Schedule Shadow Day with New Hire' (HRT0004956, Overdue 2 days), is highlighted with a red box. To the right of this task is a modal form titled 'HRT0004956 Schedule Shadow Day'. This form contains three required fields: '\* Date/Time' (with a calendar icon), '\* Shadow Day POC Employee Name', and '\* Location' (a dropdown menu). At the bottom of the form are 'Cancel', 'Save', and 'Submit' buttons. The entire modal form is also highlighted with a red box.

# Project Overview - USPS HR Onboarding Pilot Journey Map

*I accepted my offer am looking forward to receiving information on next steps.*



## PRE-BOARDING

*I am eager to get started; The Orientation Letter confirmed my position, unit, and details of my Orientation. The New Hire site makes everything very straightforward.*



## DAY 1 (OF ORIENTATION)

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## WEEK 1

*There was lots to do this week, Onboarding Forms, Driver Training, and additional Orientation Training, but so far everything is going very smoothly.*

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*My Supervisor has provided me with very clear feedback, and I was able to clarify my questions and expectations without issue.*



## WEEK 2

*I'm excited to finally take part in a Shadow Day and On the Job training to learn more about my job.*



## 60 DAY

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## 90 DAY

*Finally! My last review went well, and I am a part of the team. The whole process went smoother than I expected.*



## 80 DAY

*I'm glad I had the opportunity to improve since the previous review. My third review went exactly as I expected.*



**NOTE: RCA/ARCs will end System Process at the end of Week 2**

**NOTE: Shadow Days only apply to newly hired city and rural carriers. If the Shadow Day is not applicable to a newly hired employee, you do not need to complete the action in the HR Onboarding Pilot System**

## Workflow – Week 1 Tasks

### Scheduling Initial Meeting with Supervisor:

Supervisors will use this task to schedule the date a New Hire has their initial probationary meeting with the Supervisor. Once the task is marked complete by the Supervisor, an email is sent to the New Hire with the information needed for the meeting including the date and location of the meeting as well as duration

**NOTE:** If the task is completed prior to the New Hire's effective date, a system generated email containing the relevant information will be sent. However, if the task is completed past the New Hire's effective date, no system generated email will be sent to the New Hire and it will be the responsibility of the Supervisor to communicate the relevant information to the New Hire outside the HR Onboarding Pilot system

The screenshot displays the 'HR Onboarding: Jia Saloni' interface. At the top, there are four profile cards: New Hire (Jia Saloni), Supervisor (Jia Saloni), HR Rep (NH HR Representative), and Training Rep (NH Training Lead). Below these are fields for Effective Date (2021-05-07), Employment Type (Non-Career Employee), Position (City Carrier Assistant 2), and Location (03049-HOLLIS-1367208). The main section is titled 'Tasks/To-Dos' and shows a list of tasks for 'Week 1'. The task 'Schedule Initial Meeting with Superv...' is highlighted with a red box. To the right, a modal window for 'HRT0004944 Schedule Initial Meeting with Supervisor' is open, also highlighted with a red box. This modal contains fields for 'Enter Meeting Time:', 'Duration (Enter time in Minutes):' (with a range of 10-120), and 'Location:'. At the bottom of the modal are 'Cancel', 'Save', and 'Submit' buttons.

## Workflow – Week 1 Tasks

### Shadow Day Checklist:

If applicable Supervisors can use this checklist to view how they can prepare for the New Hire's Shadow Day. Supervisors can download the checklist displayed in the task

HR Onboarding: Jia Saloni

Actions

New Hire: Jia Saloni  
Effective Date: 2021-05-07

Supervisor: NH Supervisor  
Employment Type: Non-Career Employee

HR Rep: NH HR Representative  
Position: City Carrier Assistant 2

Training Rep: NH Training Lead  
Location: 03049-HOLLIS-1367208

Tasks/To-Dos Activity Attachments

Week 1

- Welcome New Hire to the Unit/Duty ... Due in 4 days
- Enter New Hire time into TACS (Week 1) Due in 4 days
- Prepare for Shadow Day with New Hire Due in 4 days**
- Prepare for New Hire's First Day in th... Due in 4 days
- Schedule Initial Meeting with Superv... Due in 4 days

Prepare for Shadow Day with New Hire  
HRT0004938 Due in 4 days

Attachments History

Ask a Question

**New Hire Intro to Unit Checklist**

SECTION 1 – General Information (Complete for each new hire)

Employee Name: \_\_\_\_\_

EIN: \_\_\_\_\_

Unit Name & Finance: \_\_\_\_\_

Effective Date: \_\_\_\_\_

Shadow Day Date: \_\_\_\_\_

First Day in Unit Date: \_\_\_\_\_

SECTION 2 – Management Process Checklist (Initial and date each step when complete)

**PART A – The Shadow Day**

Preparation for Shadow Day – Postmaster / Manager

		Initial	Date
A1	Coordinate date, time, and reporting instructions with district training		
A2	Schedule Shadow Day with OJI or qualified POC		
A3	Schedule back up POC, in case primary POC becomes unavailable		
A4	Block out time on your calendar for an initial meeting with new hire		
A5	Schedule installation of jump seat for shadow day (if necessary)		
A6	Print route map for route to be shadowed (if applicable)		

## Workflow – Week 1 Tasks

### Enter Time in TACs:

This task is a reminder for Supervisor's to enter the New Hire's time in the Time and Attendance System (TACs) outside of the HR Onboarding Pilot system

HR Onboarding: Jia Saloni

Actions

JIS

New Hire  
Jia Saloni

Effective Date  
2021-05-07

NS

Supervisor  
NH Supervisor

Employment Type  
Non-Career Employee

MHR

HR Rep  
NH HR Representative

Position  
City Carrier Assistant 2

NTL

Training Rep  
NH Training Lead

Location  
03049-HOLLIS-1367208

Tasks/To-Dos

Activity

Attachments

< Week 1

Enter New Hire time into TACS (Week 1)  
HRT0004939 Due in 4 days

Attachments History

Ask a Question

Welcome New Hire to the Unit/Duty ...  
Due in 4 days

Enter New Hire time into TACS (Week 1)  
Due in 4 days

Prepare for Shadow Day with New Hire  
Due in 4 days

Prepare for New Hire's First Day in th...  
Due in 4 days

Schedule Initial Meeting with Superv...

Be sure to enter your New Hire's time into TACS for their first week. If your New Hire completed training, you should have received a copy of their timecard from the Training facilitator.

Enter New Hire time into TACS (Week 1)  
Click on the Complete button to mark task as complete.

Complete

## Workflow – Week 1 Tasks

### Prepare for New Hire's first day Unit/Duty Station:

A checklist is available for Supervisors through this task outlining how they can prepare for the New Hire's first day at Unit/Duty Station. Supervisors can download the checklist displayed in the task

HR Onboarding: Jia Saloni

New Hire: Jia Saloni  
Effective Date: 2021-05-07

Supervisor: NH Supervisor  
Employment Type: Non-Career Employee

HR Rep: NH HR Representative  
Position: City Carrier Assistant 2

Training Rep: NH Training Lead  
Location: 03049-HOLLIS-1367208

Tasks/To-Dos Activity Attachments

Week 1

Welcome New Hire to the Unit/Duty ...  
Due in 4 days

Enter New Hire time into TACS (Week 1)  
Due in 4 days

Prepare for Shadow Day with New Hire  
Due in 4 days

**Prepare for New Hire's First Day in th...**  
Due in 4 days

Schedule Initial Meeting with Superv...  
Due in 4 days

Prepare for New Hire's First Day in the Unit/Duty Station  
HRT0004940 Due in 4 days

Attachments History

Ask a Question

1 of 2

**PART B – Preparing for the first day in the unit – Postmaster / Manager**

Prepare Welcome Introduction Package (Recommended Items)		Initial	Date
B1	Order USPS Knit Cap eBay # 5447626-517924-NAV-ONESZ-23		
B2	Order USPS Mesh Baseball Cap eBay # 5447642-517928-NAV-ONESZ-36		
B3	Order USPS Vest eBay # 112291		
B4	Order USPS Water bottle eBay # 5447641-517927-ROY-ONESZ-30		
B5	Order Carrier Satchel Topeka NSN: 8465-01-141-0813 (CCA)		
B6	Order Satchel Buckle Topeka NSN: 5340-02-000-8196 (CCA)		
B7	Order Satchel Strap Topeka NSN: 8465-01-365-1060 (CCA)		
B8	Order Satchel Shoulder Pad NSN: 8465-01-365-7843 (CCA)		
B9	Order Dog Spray eBay # S1001152		
B10	Binder to collect route maps eBay # 7510-01-510-4865		
B11	Contact phone numbers - Office hotline, Postmaster, Supervisor, and Union		
B12	Dog Repellent Holster eBay # S1001153		
B13	Headlamp eBay # 7665814		
B14	Scanner Holster eBay # S1310		
B15	Scotch Tray eBay # N1019546		
B16	Forms: PS-3849, PS-3575, PS-3546		
B17	COVID: Face Masks, Hand Sanitizer, Nitrile Gloves		
B18	General Supplies: Notepad, Pens, Rubber Bands		
B19	Heat Illness Prevention Program Card NSN: 7530-18-000-4041		
Order an FBR badge (Timecard)		Initial	Date

## Workflow – Week 1 Tasks

### Welcome New Hire to Unit/Duty Station:

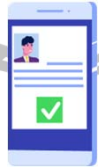
A checklist is available for Supervisors through this task outlining how they can prepare for the New Hire's first day at Unit/Duty Station. Supervisors can download the checklist displayed in the task

The screenshot displays the HR Onboarding interface for Jia Saloni. The top section shows employee details: New Hire Jia Saloni (Effective Date: 2021-05-07), Supervisor NH Supervisor (Employment Type: Non-Career Employee), HR Rep NH HR Representative (Position: City Carrier Assistant 2), and Training Rep NH Training Lead (Location: 03049-HOLLIS-1367208). The main area lists tasks for Week 1, with 'Welcome New Hire to the Unit/Duty ...' highlighted. This task is due in 4 days and includes a checklist titled 'PART C – First day in unit welcome process – Postmaster / Manager & Union Steward'. The checklist is divided into three sections: 'Make a Great First Impression' (C1-C5), 'Give a tour of the facility – Postmaster & OJI or Union Steward' (C6-C12), and 'Meeting with Postmaster / Station Manager' (C13-C16). Each item has columns for 'Initial' and 'Date'.

PART C – First day in unit welcome process – Postmaster / Manager & Union Steward		
	Initial	Date
<b>Make a Great First Impression</b>		
C1 Introduce Supervisors		
C2 Introduce Union Shop Steward		
C3 Introduce Safety Captain		
C4 Reintroduce OJI or POC (if applicable)		
C5 Introduce new hire to coworkers (Stand Up)		
<b>Give a tour of the facility – Postmaster &amp; OJI or Union Steward</b>		
C6 Show the new hire around your unit (if applicable, include the Distribution Area, Hotcase, Accountable cage, Window, PO Box, Supervisor desk, Dispatch Area, Parking)		
C7 Show where the schedule is posted		
C8 Explain the emergency action plan		
C9 Show new hire where is the time clock and how to use it		
C10 Show new hire where to store personal items (assign locker if available)		
C11 Show new hire where Safety huddle board is		
C12 Show new hire where the break room and bathrooms are		
<b>Meeting with Postmaster / Station Manager</b>		
C13 Give new hire welcome intro package (if applicable)		
C14 Discuss PS Form 1750 process (if applicable)		
C15 Review expected milestones within 30, 60 and 90 days		
C16 Encourage new hire to ask questions		
<b>Prepare for OJI Training (if applicable)</b>		

# Project Overview - USPS HR Onboarding Pilot Journey Map

*I accepted my offer am looking forward to receiving information on next steps.*



## PRE-BOARDING

*I am eager to get started; The Orientation Letter confirmed my position, unit, and details of my Orientation. The New Hire site makes everything very straightforward.*

## DAY 1 (OF ORIENTATION)

*I was able to complete the "Welcome to USPS" training without issue. The Orientation team was very helpful and well-coordinated.*



## WEEK 1

*There was lots to do this week, Onboarding Forms, Driver Training, and additional Orientation Training, but so far everything is going very smoothly.*

## 30 DAY

*My Supervisor has provided me with very clear feedback, and I was able to clarify my questions and expectations without issue.*



## WEEK 2

*I'm excited to finally take part in a Shadow Day and On the Job training to learn more about my job.*



## 60 DAY

*I'm glad I had the opportunity to improve since the previous review. My second review went exactly as I expected.*



## 90 DAY

*Finally! My last review went well, and I am a part of the team. The whole process went smoother than I expected.*



## 80 DAY

*I'm glad I had the opportunity to improve since the previous review. My third review went exactly as I expected.*



**NOTE: RCA/ARCs will end System Process at the end of Week 2**

**NOTE: Shadow Days only apply to newly hired city and rural carriers. If the Shadow Day is not applicable to a newly hired employee, you do not need to complete the action in the HR Onboarding Pilot System**



## Workflow – Week 2 Tasks

### Conduct Initial Meeting with New Hire:

Through this task Supervisors confirm they have conducted the initial probationary meeting with the New Hire.

The screenshot displays the 'HR Onboarding: Jia Saloni' interface. At the top, there are four user roles: New Hire (Jia Saloni), Supervisor (NH Supervisor), HR Rep (NH HR Representative), and Training Rep (NH Training Lead). Below this, the 'Tasks/To-Dos' tab is active, showing a list of tasks for 'Week 2'. The task 'Conduct Initial Meeting With Supervisor' is highlighted with a red box. To the right, a modal window for this task is open, also outlined in red. The modal contains a title bar 'HRT0004957 Conduct Initial Meeting With Supervisor', a certification statement 'I certify that I have conducted an Initial Probationary Review with my New Hire', a dropdown menu with '-- Choose --', and buttons for 'Cancel', 'Save', and 'Submit'.

HR Onboarding: Jia Saloni

Actions

New Hire  
Jia Saloni  
Effective Date  
2021-05-07

Supervisor  
NH Supervisor  
Employment Type  
Non-Career Employee

HR Rep  
NH HR Representative  
Position  
City Carrier Assistant 2

Training Rep  
NH Training Lead  
Location  
03049-HOLLIS-1367208

Tasks/To-Dos Activity Attachments

Week 2

Enter New Hire time into TACS (Week 2)  
Due in 11 days

Conduct Initial Meeting With Supervisor  
Due in 11 days

Schedule 30-day Review  
Due in 11 days

Conduct Initial Meeting With Supervisor  
HRT0004957 Due in 11 days

Attachments History Ask a Question

HRT0004957 Conduct Initial Meeting With Supervisor

I certify that I have conducted an Initial Probationary Review with my New Hire

-- Choose --

Cancel Save Submit

## Workflow – Week 2 Tasks

### Enter Time in TACs:

This task is a reminder for Supervisor's to enter the New Hire's time in the Time and Attendance System (TACs) outside of the HR Onboarding Pilot system.

HR Onboarding: Jia Saloni

Actions

JS

New Hire

Jia Saloni

Effective Date

2021-05-07

NS

Supervisor

NH Supervisor

Employment Type

Non-Career Employee

NHR

HR Rep

NH HR Representative

Position

City Carrier Assistant 2

NTL

Training Rep

NH Training Lead

Location

03049-HOLLIS-1367208

Tasks/To-Dos

Activity

Attachments

< Week 2

Enter New Hire time into TACS (Week 2)

Due in 11 days

Enter New Hire time into TACS (Week 2)

Due in 11 days

Conduct Initial Meeting With Supervi...

Due in 11 days

Schedule 30-day Review

Due in 11 days

Enter New Hire time into TACS (Week 2)

HRT0004934 Due in 11 days

Attachments History

Ask a Question

Be sure to enter your New Hire's time into TACS for their first week. If your New Hire completed training, you should have received a copy of their timecard from the Training facilitator.

Enter New Hire time into TACS (Week 2)

Click on the Complete button to mark task as complete.

Complete

## Workflow – Week 2 Tasks

### Scheduling 30-Day Review:

Supervisors will use this task to schedule the 30-day evaluation for the New Hire.

**NOTE:** There are no additional tasks past this point for Supervisors associated to a RCA/ARC case. The following tasks and activity sets will ONLY be triggered for non-RCA/ARC New Hires.

RCAs/ARCs will be excluded from the scheduling and completion of automated PS Form 1750 evaluations at the 30, 60, and 80-Day reviews. They will continue to be evaluated using the same process used today and their reviews will not be captured within the HR Onboarding Pilot tool.

The screenshot displays the 'HR Onboarding: Jia Saloni' interface. At the top, there are four user roles: New Hire (Jia Saloni), Supervisor (NH Supervisor), HR Rep (NH HR Representative), and Training Rep (NH Training Lead). Below this, the 'Tasks/To-Dos' tab is active, showing a list of tasks. The 'Schedule 30-day Review' task is highlighted with a red box. To the right of this task, a modal window is open, titled 'HRT0004958 Schedule 30-Day Review'. This modal contains fields for 'Enter Meeting Time:', 'Duration (Enter time in Minutes):' (with a range of 15 - 120), and 'Location:'. At the bottom of the modal are 'Cancel', 'Save', and 'Submit' buttons.

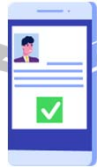
# Project Overview - USPS HR Onboarding Pilot Journey Map

*I accepted my offer am looking forward to receiving information on next steps.*



## PRE-BOARDING

*I am eager to get started; The Orientation Letter confirmed my position, unit, and details of my Orientation. The New Hire site makes everything very straightforward.*



## DAY 1 (OF ORIENTATION)

*I was able to complete the "Welcome to USPS" training without issue. The Orientation team was very helpful and well-coordinated.*



## WEEK 1

*There was lots to do this week, Onboarding Forms, Driver Training, and additional Orientation Training, but so far everything is going very smoothly.*



## 30 DAY

*My Supervisor has provided me with very clear feedback, and I was able to clarify my questions and expectations without issue.*

## WEEK 2

*I'm excited to finally take part in a Shadow Day and On the Job training to learn more about my job.*



## 60 DAY

*I'm glad I had the opportunity to improve since the previous review. My second review went exactly as I expected.*



## 90 DAY

*Finally! My last review went well, and I am a part of the team. The whole process went smoother than I expected.*



## 80 DAY

*I'm glad I had the opportunity to improve since the previous review. My third review went exactly as I expected.*



**NOTE: RCA/ARCs will end System Process at the end of Week 2**

**NOTE: Shadow Days only apply to newly hired city and rural carriers. If the Shadow Day is not applicable to a newly hired employee, you do not need to complete the action in the HR Onboarding Pilot System**

## Workflow – Day 30 Tasks

### Enter ratings and generate form:

The Supervisor will enter their evaluation of the New Hire's performance in this task. Once the task is completed, a PDF of the Form 1750 is generated using the Supervisor's input values. The generated PDF can be found under the 'Attachments' tab on the HR case page

**NOTE:** RCAs/ARCs will be excluded from the scheduling and completion of automated PS Form 1750 evaluations at the 30, 60, and 80-Day reviews. They will continue to be evaluated using the same process used today and their reviews will not be captured within the HR Onboarding Pilot tool.

HR Onboarding: Jia Saloni

Actions

New Hire  
Jia Saloni  
Effective Date  
2021-05-07

Supervisor  
NH Supervisor  
Employment Type  
Non-Career Employee

HR Rep  
NH HR Representative  
Position  
City Carrier Assistant 2

Training Rep  
NH Training Lead  
Location  
03049-HOLLIS-1367208

Tasks/To-Dos Activity Attachments

Day 30

Enter ratings and generate 30-day review form  
HRT0004937 Overdue 48 days

Conduct 30-Day Review  
Overdue 48 days

Enter ratings and generate 30-day re...  
Overdue 48 days

Schedule 60-day review  
Overdue 48 days

Attachments History

HRT0004937 30 Day - 1750 Form

\* Pay Location

\* Factor Rating: Work Quantity

Examples of Satisfactory Performance Levels:

Works at a sufficient speed to keep up with the amount of work required by the position.  
Accomplishes tasks in an efficient and timely manner.  
Makes productive use of time when completing assignments.

--- Choose ---

\* Factor Rating: Work Quality

Examples of Satisfactory Performance Levels:

Makes few errors or mistakes.  
Performs work which meets the expectations of the position.  
Works in a careful, alert, and conscientious manner to ensure the accuracy and completeness of the work performed.

--- Choose ---



## Workflow – Day 30 Tasks

### Conduct Review:

Through this task Supervisors confirm they have conducted the 30-day probationary meeting with the New Hire.

**NOTE:** RCAs/ARCs will be excluded from the scheduling and completion of automated PS Form 1750 evaluations at the 30, 60, and 80-Day reviews. They will continue to be evaluated using the same process used today and their reviews will not be captured within the HR Onboarding Pilot tool.

The screenshot displays the 'HR Onboarding: Jia Saloni' interface. At the top, there are four profile cards: New Hire (Jia Saloni), Supervisor (NH Supervisor), HR Rep (NH HR Representative), and Training Rep (NH Training Lead). Below these are tabs for 'Tasks/To-Dos', 'Activity', and 'Attachments'. The 'Tasks/To-Dos' tab is active, showing a list of tasks. The 'Conduct 30-Day Review' task is highlighted with a red box, indicating it is overdue by 48 days. To the right, a detailed view of this task is shown, also highlighted with a red box. It includes the task ID 'HRT0004951', a description of the 30-day review process, a dropdown menu for selection, and radio buttons to confirm if the New Hire signed the review. At the bottom of the task view are 'Cancel', 'Save', and 'Submit' buttons.

HR Onboarding: Jia Saloni

Actions

New Hire  
Jia Saloni  
Effective Date  
2021-05-07

Supervisor  
NH Supervisor  
Employment Type  
Non-Career Employee

HR Rep  
NH HR Representative  
Position  
City Carrier Assistant 2

Training Rep  
NH Training Lead  
Location  
03049-HOLLIS-1367208

Tasks/To-Dos Activity Attachments

< Day 30

Conduct 30-Day Review  
HRT0004951 Overdue 48 days

Attachments History Ask a Question

Conduct 30-Day Review  
Overdue 48 days

Enter ratings and generate 30-day re...  
Overdue 48 days

Schedule 60-day review  
Overdue 48 days

HRT0004951 Conduct 30-Day Review

Conduct the 30-day review with your New Hire. Review the PS form 1750 (probationary form) and discuss the rating that have been provided against all factors on job performance to-date. Obtain acknowledgement from the New Hire or indicate a refusal to sign

-- Choose --

Did this New Hire sign the 30-Day review?

☐ Yes, this New Hire has signed the 30-Day review.

☐ No, this New Hire refused to sign the 30-Day review.

Cancel Save Submit

## Workflow – Day 30 Tasks

### Schedule 60-Day Review:

Supervisors will use this task to schedule the date the 60-day evaluation for the New Hire.

**NOTE:** RCAs/ARCs will be excluded from the scheduling and completion of automated PS Form 1750 evaluations at the 30, 60, and 80-Day reviews. They will continue to be evaluated using the same process used today and their reviews will not be captured within the HR Onboarding Pilot tool.

The screenshot displays the 'HR Onboarding: Jia Saloni' interface. At the top, there are four user roles: New Hire (Jia Saloni), Supervisor (NH Supervisor), HR Rep (NH HR Representative), and Training Rep (NH Training Lead). Below this, the 'Tasks/To-Dos' tab is active, showing a list of tasks. The 'Schedule 60-day review' task is highlighted with a red box. The task details show 'HRT0004949' and 'Overdue 48 days'. The task is titled 'Schedule 60-day review' and is due in 48 days. The task is currently in the 'Attachments' tab, showing a form for scheduling the review. The form includes fields for 'Enter Meeting Time:', 'Duration (Enter time in Minutes):', and 'Location:'. The 'Duration' field has a range of 15 - 120 minutes. The 'Location' field is a dropdown menu. The form also has 'Cancel', 'Save', and 'Submit' buttons.

HR Onboarding: Jia Saloni

Actions

New Hire: Jia Saloni  
Effective Date: 2021-05-07

Supervisor: NH Supervisor  
Employment Type: Non-Career Employee

HR Rep: NH HR Representative  
Position: City Carrier Assistant 2

Training Rep: NH Training Lead  
Location: 03049-HOLLIS-1367208

Tasks/To-Dos Activity Attachments

Day 30

Schedule 60-day review  
HRT0004949 Overdue 48 days

Conduct 30-Day Review  
Overdue 48 days

Enter ratings and generate 30-day re...  
Overdue 48 days

Schedule 60-day review  
Overdue 48 days

Attachments History Ask a Question

HRT0004949 Schedule 60-Day Review  
Schedule 60-Day Review

\*Enter Meeting Time:

\*Duration (Enter time in Minutes):  
 Range: 15 - 120

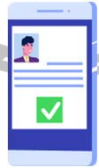
\*Location:

Cancel Save Submit



# Project Overview - USPS HR Onboarding Pilot Journey Map

*I accepted my offer and am looking forward to receiving information on next steps.*



## PRE-BOARDING

*I am eager to get started; The Orientation Letter confirmed my position, unit, and details of my Orientation. The New Hire site makes everything very straightforward.*

## DAY 1 (OF ORIENTATION)

*I was able to complete the "Welcome to USPS" training without issue. The Orientation team was very helpful and well-coordinated.*

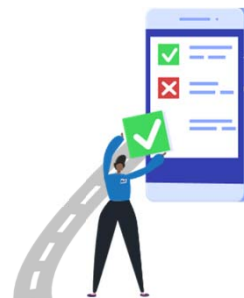


## WEEK 1

*There was lots to do this week, Onboarding Forms, Driver Training, and additional Orientation Training, but so far everything is going very smoothly.*

## 30 DAY

*My Supervisor has provided me with very clear feedback, and I was able to clarify my questions and expectations without issue.*



## WEEK 2

*I'm excited to finally take part in a Shadow Day and On the Job training to learn more about my job.*



## 60 DAY

*I'm glad I had the opportunity to improve since the previous review. My second review went exactly as I expected.*



## 80 DAY

*I'm glad I had the opportunity to improve since the previous review. My third review went exactly as I expected.*



## 90 DAY

*Finally! My last review went well, and I am a part of the team. The whole process went smoother than I expected.*



**NOTE: RCA/ARCs will end System Process at the end of Week 2**

**NOTE: Shadow Days only apply to newly hired city and rural carriers. If the Shadow Day is not applicable to a newly hired employee, you do not need to complete the action in the HR Onboarding Pilot System**

## Workflow – Day 60 Tasks

### Enter ratings and generate form:

The Supervisor will enter their evaluation of the New Hire's performance in this task. Once the task is completed, a PDF of the Form 1750 is generated using the Supervisor's input values. The generated PDF can be found under the 'Attachments' tab on the HR case page

**NOTE:** RCAs/ARCs will be excluded from the scheduling and completion of automated PS Form 1750 evaluations at the 30, 60, and 80-Day reviews. They will continue to be evaluated using the same process used today and their reviews will not be captured within the HR Onboarding Pilot tool.

The screenshot displays the 'HR Onboarding: Jia Saloni' interface. At the top, there are four user roles: New Hire (Jia Saloni), Supervisor (NH Supervisor), HR Rep (NH HR Representative), and Training Rep (NH Training Lead). Below this, the 'Tasks/To-Dos' tab is active, showing a list of tasks. The task 'Enter ratings and generate 60-day re...' is highlighted with a red box. The main content area shows the 'Enter ratings and generate 60-day review form' for HRT0004954, which is overdue by 18 days. The form includes sections for 'Factor Rating: Work Quantity', 'Factor Rating: Work Quality', and 'Factor Rating: Dependability', each with 'Examples of Satisfactory Performance Levels' and a dropdown menu to select a rating. The 'Attachments' tab is also visible, showing the generated PDF of the Form 1750.

## Workflow – Day 60 Tasks

**Populated from the  
Enter Ratings  
Task**

**Populated from the  
New Hire's HR  
Profile**

**NOTE:** RCAs/ARCs will be excluded from the scheduling and completion of automated PS Form 1750 evaluations at the 30, 60, and 80-Day reviews. They will continue to be evaluated using the same process used today and their reviews will not be captured within the HR Onboarding Pilot tool.

## Workflow – Day 60 Tasks

### Conduct Review:

Through this task Supervisors confirm they have conducted the 60-day probationary meeting with the New Hire.

**NOTE:** RCAs/ARCs will be excluded from the scheduling and completion of automated PS Form 1750 evaluations at the 30, 60, and 80-Day reviews. They will continue to be evaluated using the same process used today and their reviews will not be captured within the HR Onboarding Pilot tool.

The screenshot displays the 'HR Onboarding: Jia Saloni' interface. At the top, there are four user roles: JS New Hire Jia Saloni, NS Supervisor NH Supervisor, HR Rep NH HR Representative, and NTL Training Rep NH Training Lead. Below this, the 'Effective Date' is 2021-05-07, 'Employment Type' is Non-Career Employee, 'Position' is City Carrier Assistant 2, and 'Location' is 03049-HOLLIS-1367208. The main section is titled 'Tasks/To-Dos' and lists three tasks: 'Day 60', 'Schedule 80-Day Review' (Overdue 18 days), and 'Conduct 60-Day Review' (Overdue 18 days). The 'Conduct 60-Day Review' task is highlighted with a red box. To the right, a modal window titled 'HRT0004953 Conduct 60-Day Review' is open, also highlighted with a red box. It contains instructions to conduct the 60-day review with the New Hire, review the PS form 1750, and discuss the rating. Below the instructions is a dropdown menu labeled '-- Choose --'. A question follows: 'Did this New Hire sign the 60-Day review?' with two radio button options: 'Yes, this New Hire has signed the 60-Day review.' and 'No, this New Hire refused to sign the 60-Day review.' At the bottom of the modal are 'Cancel', 'Save', and 'Submit' buttons.

## Workflow – Day 60 Tasks

### Schedule 80-Day Review:

Supervisors will use this task to schedule the date the 80-day evaluation for the New Hire.

**NOTE:** RCAs/ARCs will be excluded from the scheduling and completion of automated PS Form 1750 evaluations at the 30, 60, and 80-Day reviews. They will continue to be evaluated using the same process used today and their reviews will not be captured within the HR Onboarding Pilot tool.

HR Onboarding: Jia Saloni

Actions

New Hire: Jia Saloni  
Effective Date: 2021-05-07

Supervisor: NH Supervisor  
Employment Type: Non-Career Employee

HR Rep: NH HR Representative  
Position: City Carrier Assistant 2

Training Rep: NH Training Lead  
Location: 03049-HOLLIS-1367208

Tasks/To-Dos Activity Attachments

< Day 60

Schedule 80-Day Review  
HRT0004936 Overdue 18 days

Conduct 60-Day Review  
Overdue 18 days

Enter ratings and generate 60-day re...  
Overdue 18 days

Schedule 80-Day Review  
HRT0004936 Schedule 80-Day Review

\*Enter Meeting Time:

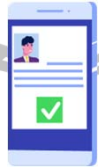
\*Duration (Enter time in Minutes):  
Range: 15 - 120

\*Location:

Cancel Save Submit

# Project Overview - USPS HR Onboarding Pilot Journey Map

*I accepted my offer am looking forward to receiving information on next steps.*



## PRE-BOARDING

*I am eager to get started; The Orientation Letter confirmed my position, unit, and details of my Orientation. The New Hire site makes everything very straightforward.*

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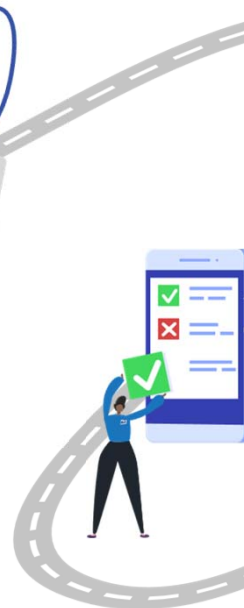


## WEEK 1

*There was lots to do this week, Onboarding Forms, Driver Training, and additional Orientation Training, but so far everything is going very smoothly.*

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*My Supervisor has provided me with very clear feedback, and I was able to clarify my questions and expectations without issue.*



## WEEK 2

*I'm excited to finally take part in a Shadow Day and On the Job training to learn more about my job.*



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*I'm glad I had the opportunity to improve since the previous review. My second review went exactly as I expected.*



## 90 DAY

*Finally! My last review went well, and I am a part of the team. The whole process went smoother than I expected.*



## 80 DAY

*I'm glad I had the opportunity to improve since the previous review. My third review went exactly as I expected.*



**NOTE: RCA/ARCs will end System Process at the end of Week 2**

**NOTE: Shadow Days only apply to newly hired city and rural carriers. If the Shadow Day is not applicable to a newly hired employee, you do not need to complete the action in the HR Onboarding Pilot System**

## Workflow – Day 80 Tasks

### Enter ratings and generate form:

The Supervisor will enter their evaluation of the New Hire's performance in this task. Once the task is completed, a PDF of the Form 1750 is generated using the Supervisor's input values. The generated PDF can be found under the 'Attachments' tab on the HR case page.

**NOTE:** RCAs/ARCs will be excluded from the scheduling and completion of automated PS Form 1750 evaluations at the 30, 60, and 80-Day reviews. They will continue to be evaluated using the same process used today and their reviews will not be captured within the HR Onboarding Pilot tool.

The screenshot displays the 'HR Onboarding: Jia Saloni' interface. At the top, there are four user roles: New Hire (Jia Saloni), Supervisor (NH Supervisor), HR Rep (NH HR Representative), and Training Rep (NH Training Lead). Below this, the 'Tasks/To-Dos' tab is active, showing a list of tasks. The task 'Enter ratings and generate 80-day review form' (HRT0004971) is highlighted with a red box. To the right, the 'Attachments' tab is also visible, showing the generated '80 Day - 1750 Form' (HRT0004971). The form content includes sections for 'Factor Rating A: Work Quantity', 'Factor Rating: Work Quality', and 'Factor Rating: Dependability', each with 'Examples of Satisfactory Performance Levels' and a dropdown menu to select a rating.

HR Onboarding: Jia Saloni

Actions

New Hire: Jia Saloni  
Effective Date: 2021-05-07

Supervisor: NH Supervisor  
Employment Type: Non-Career Employee

HR Rep: NH HR Representative  
Position: City Carrier Assistant 2

Training Rep: NH Training Lead  
Location: 03049-HOLLIS-1367208

Tasks/To-Dos Activity Attachments

Day 80

Conduct 80-Day Review  
Due in 2 days

Enter ratings and generate 80-day review form  
HRT0004971 Due in 2 days

Attachments History

Ask a Question

HRT0004971 80 Day - 1750 Form

\* Factor Rating A: Work Quantity  
Examples of Satisfactory Performance Levels:  
Works at a sufficient speed to keep up with the amount of work required by the position.  
Accomplishes tasks in an efficient and timely manner.  
Makes productive use of time when completing assignments.  
-- Choose --

\* Factor Rating: Work Quality  
Examples of Satisfactory Performance Levels:  
Makes few errors or mistakes.  
Performs work which meets the expectations of the position.  
Works in a careful, alert, and conscientious manner to ensure the accuracy and completeness of the work performed.  
-- Choose --

\* Factor Rating: Dependability  
Examples of Satisfactory Performance Levels:  
Completes work assignments without unnecessary supervision.



## 44

Populated from the  
Enter Ratings  
Task

**Populated from the  
New Hire's HR  
Profile**

**NOTE:** RCAs/ARCs will be excluded from the scheduling and completion of automated PS Form 1750 evaluations at the 30, 60, and 80-Day reviews. They will continue to be evaluated using the same process used today and their reviews will not be captured within the HR Onboarding Pilot tool.



## Workflow – Day 80 Tasks

### Conduct Review:

Through this task Supervisors confirm they have conducted the 80-day probationary meeting with the New Hire.

**NOTE:** RCAs/ARCs will be excluded from the scheduling and completion of automated PS Form 1750 evaluations at the 30, 60, and 80-Day reviews. They will continue to be evaluated using the same process used today and their reviews will not be captured within the HR Onboarding Pilot tool.

HR Onboarding: Jia Saloni

Actions

New Hire: Jia Saloni  
Effective Date: 2021-05-07

Supervisor: NH Supervisor  
Employment Type: Non-Career Employee

HR Rep: NH HR Representative  
Position: City Carrier Assistant 2

Training Rep: NH Training Lead  
Location: 03049-HOLLIS-1367208

Tasks/To-Dos Activity Attachments

Day 80

Conduct 80-Day Review  
Due in 2 days

Enter ratings and generate 80-day re...  
Due in 2 days

Conduct 80-Day Review  
HRT0004932 Due in 2 days

Attachments History Ask a Question

HRT0004932 Conduct 80-Day Review  
Conduct 80-Day Review

Conduct the 80-day review with your New Hire. Review the PS form 1750 (probationary form) and discuss the rating that have been provided against all factors on job performance to-date. Obtain acknowledgement from the New Hire or indicate a refusal to sign

-- Choose --

Did this New Hire sign the 80-Day review?

☐ Yes, this New Hire has signed the 80-Day review.

☐ No, this New Hire refused to sign the 80-Day review.

Cancel Save Submit

# Module 4

## Initiating Separation

# Closing a ServiceNow HR Onboarding Case

The screenshot shows the ServiceNow HR Onboarding Case interface for Gerardo Li. The case details include: New Hire (GL), Gerardo Li; Supervisor (SS), SC Supervisor; HR Rep (SHR), SC HR Representative; Effective Date: 2021-10-19; Employment Type: Non-Career Employee; Position: MAIL M...; and a reference number 657. The 'Actions' dropdown menu is open, showing options: Close Onboarding Case, Send Email, Reassign Supervisor, Reassign HR Representative, and Reassign Training Lead. The 'Close Case' dialog box is open, displaying instructions and a form to complete the closure.

**Close Case**

Only proceed with taking the action if:

1. You want to stop the New Hire's Onboarding or the probationary period for this New Hire has ended.
2. You want to close the Onboarding case.

If you are closing this case due to separation...

This will not initiate a Separation request, follow the appropriate process outside this system to ensure the New Hire is removed from Rolls. Instructions for processing separations can be found at <https://blue.usps.gov/hr/hrssc-info/separations/>

Reason for Closing Case:

Voluntary Separation - New Hire Initiated

Additional Notes

Last day worked: 7/30/2021

☒ I confirm that a separation request has been initiated outside this system per the USPS guidelines, these details look correct and this onboarding case will be closed.

Cancel OK

**Closure Reason:**

When closing a case, the user must identify a reason. Provide additional high-level notes if "Other" is selected (example "Duplicate record").

## Auto-Close:

ServiceNow HR Onboarding cases for non-ARC/RCA's will close automatically at the end of the New Hire's probationary period.

## Manual Closure:

- 1) ServiceNow HR cases for ARC/RCA's must be closed manually after training is complete.
- 2) ServiceNow HR cases for any New Hire must be closed manually in the event of a separation from USPS.

# Module 5

## Communication

## Communication – Sending an Email

**HR Pilot users** can send an email to other HR Pilot users, through the case\*. The email will be tracked in the case notes.

The screenshot displays the 'HR Onboarding: Gerardo Li' case page. At the top, there are tabs for 'New Hire', 'Supervisor', 'HR Rep', and 'Training Lead'. Below these, fields for 'Effective Date' (2021-10-19), 'Employment Type' (Non-Career Employee), and 'Position' are visible. A 'Tasks/To-Dos' section on the left shows a timeline with 'Pre-Boarding', 'Day 1', 'Week 1', and 'Week 2'. A 'Compose Email' window is open in the foreground, showing fields for 'Reply to', 'To' (SC Training Lead; Add Recipient), 'Cc' (SC Supervisor; Add Recipient), 'Bcc' (Add Recipient), and 'Subject' (HRC0001309 - HR Onboarding: Doing Great!). The email body contains the text 'I just wanted to let you know that they have been doing a fantastic job! A+ hire!'. In the top right corner, an 'Actions' dropdown menu is open, with 'Send Email' highlighted. Other options in the menu include 'Close Onboarding Case', 'Reassign Supervisor', 'Reassign HR Representative', and 'Reassign Training Lead'.

**\*NOTE:** This feature should *ONLY* be used to communicate with other HR Pilot Users (Supervisors, Trainers, HR Representatives). This feature should *NOT* be used to communicate with the New Hires

## Communication – Updating ServiceNow HR Onboarding Case Notes

**HR Pilot users** can add notes to a case using the activity tab. For example, a Trainer and Supervisor might use these notes to coordinate on rescheduling training.

The screenshot displays the ServiceNow HR Onboarding case interface. At the top, the breadcrumb navigation shows 'Home' and 'My Request'. The case details include the Number 'HRC0001309', Created '9d ago', Updated '18h ago', and State 'Ready'. The case title is 'HR Onboarding: Gerardo Li'. Below the title, there are four user roles: 'New Hire Gerardo Li' (GL), 'Supervisor SC Supervisor' (SS), 'HR Rep SC HR Representative' (SHR), and 'Training Rep SC Training Lead' (STL). The case details section shows 'Effective Date: 2021-10-19', 'Employment Type: Non-Career Employee', 'Position: MAIL HANDLER ASSISTANT', and 'Location: 29037-CHAPPELLS-1357657'. The 'Activity' tab is selected and highlighted with a red box. Below the tab, there is a text input field with the placeholder 'Type your message here...' and a 'Post' button, both enclosed in a red box. At the bottom, there is a message from 'SC Training Lead' (SL) stating 'Messages posted on the activity tab will be saved to the case notes and can be seen by all user types!'.

Home > My Request

Number  
HRC0001309

Created  
9d ago

Updated  
18h ago

State  
Ready

HR Onboarding: Gerardo Li

Actions

GL New Hire  
Gerardo Li

SS Supervisor  
SC Supervisor

SHR HR Rep  
SC HR Representative

STL Training Rep  
SC Training Lead

Effective Date  
2021-10-19

Employment Type  
Non-Career Employee

Position  
MAIL HANDLER ASSISTANT

Location  
29037-CHAPPELLS-1357657

Tasks/To-Dos Activity Attachments

Type your message here...

Post

SL SC Training Lead

just now • Additional comments

Messages posted on the activity tab will be saved to the case notes and can be seen by all user types!

**NOTE:** These notes will not be emailed to user. They will only be kept in the activity tab ServiceNow HR Onboarding.

## Communication – Notes on System Generated Emails

### Automated/System Generated Emails

- Pre-defined, system generated emails will be sent to the HR Onboarding Pilot users throughout the Onboarding Process.
  - Emails to the New Hire will be sent to their personal email address.
  - **Emails will not be sent to the New Hire on or after their effective date.**
- Users can validate that these emails have been sent out via the Activity tab of the case.
- System generated emails will not be sent when a task is assigned:
  - New Hires will receive\* emails for certain orientations and trainings
  - Reminder emails will be sent to Supervisors when it is time to schedule certain meetings
  - Emails will be sent for tasks that have not been completed within two days of its due date

***\*NOTE:** If the task is completed prior to the New Hire's effective date, a system generated email containing the relevant information will be sent. However, if the task is completed past the New Hire's effective date, no system generated email will be sent to the New Hire and it will be the responsibility of the Supervisor, Trainer, or HR Representative to communicate the relevant information to the New Hire outside the HR Onboarding Pilot system. Users should not send any email to the New Hire from the system after the New Hire's effective date.*

# Module 6

## Reassignment



## Reassigning a Case

**HR Pilot users** can reassign a set of tasks of a case to a new user

**Tasks are assigned to one of three types of users:**

- 1) Supervisors
- 2) HR Representatives
- 3) Training Leads

The screenshot displays the 'HR Onboarding: Gerardo Li' interface. At the top, there are four role cards: GL New Hire Gerardo Li, SS Supervisor SC Supervisor, SHR HR Rep SC HR Representative, and STL Training Rep SC Training Lead. Below these, a 'Tasks/To-Dos' tab is active, showing a timeline with tasks: Pre-Boarding, Day 1, Week 1, Week 2 (highlighted), Day 30, Day 60, and Day 80. A modal titled 'Select User to Reassign' is open, featuring a 'Select User:' dropdown menu with 'NH HR Representative' selected, and a 'Submit' button. To the right, an 'Actions' dropdown menu is visible, listing options: Close Onboarding Case, Send Email, Reassign Supervisor, Reassign HR Representative, and Reassign Training Lead. Red boxes highlight the 'Actions' dropdown, the 'Reassign' options, the 'Select User' dropdown, and the 'Submit' button.

# Module 7

## Submitting a Support Request

# Submitting a Support Request

**HR Pilot users** can submit a support request

**The following information is required to create a support request:**

- 1) District
- 2) Support Type
- 3) Opened For
- 4) Short Description
- 5) Description

The screenshot shows the 'HR Portal IT Support Request' form. At the top right, there is a navigation bar with 'To-dos 496', 'Requests', and 'Support Requests' (highlighted with a red box and a circled '1'). Below 'Support Requests' is a button 'Submit a Support Request' (highlighted with a red box and a circled '2') and a link 'My Support Requests'. The main form area has a title 'HR Portal IT Support Request' and a subtitle 'Ask a question about the HR portal'. A red box highlights the required fields: '\* Select District' (dropdown with 'ME-NH-VT'), '\* Support Type' (dropdown with 'Supervisor'), '\* Opened for' (dropdown with 'Brock Sizer' and a circled '3'), '\* Short Description' (text area with 'Can't see New Hire - John Doe'), and '\* Description' (text area with 'When searching for my New Hire via the My Requests page, my New Hire, John Doe, does not appear in the list.'). To the right of the form is a 'Submit' button (highlighted with a red box and a circled '4'). At the bottom right of the form is a link 'Add attachments'.

## Lab / Activities

Lab/ Activity #	Topic Covered	Est. Time (min)
1.	Portal (Homepage widgets, My Requests Page, My To-Dos Page, My Team Page, Helpful Links)	10
2.	Dashboard (Navigating to Dashboard, Dashboard tabs, Dashboard filters)	5
3.	Reporting (Running/Creating) ad-hoc reports	5
4.	Pre-Boarding Tasks Scheduling Report to Duty Station, Supervisor Checklist	10
5.	Day 1 Tasks (Scheduling Shadow Day)	5
6.	Week 1 Tasks (Schedule Initial Meeting with Supervisor, Prepare for Shadow Day with New Hire, Enter New Hire time into TACS (Week1), Welcome New Hire to the Unit/Duty Station, Prepare for New Hire's First Day in the Unit/Duty Station)	10
7.	Week 2 Tasks (Schedule 30-Day Review, Conduct Initial Meeting With Supervisor, Enter New Hire Time into TACS (Week 2))	10
8.	Day 30 Tasks (Form 1750, Scheduling Day 60 Review)	10
9.	Day 60 Tasks (Form 1750, Scheduling Day 80 Review)	10
10.	Day 80 Tasks (Form 1750)	5
11.	Cancelling a case	5
12.	Communications (Creating quick messages & using them from Actions UI)	10
13.	Reassignment	5
14.	Submitting a Support Request	5

## Lab 1 – Onboarding Portal

1. **Navigate to the HR Onboarding Portal** (<https://quspsonboarding.servicenowservices.com/onboarding>)
2. **Click through the different widgets on the homepage to familiarize yourself with the portal**
  1. Search for New Hires through the search bar on the homepage
  2. Click into My Requests and My To-Dos to familiarize yourself with the layout of the tasks/activities assigned to the logged in user
  3. Click into My Teams to better understand the your team structure
  4. NOTE: Direct reports and managers may not be visible to all users as the data is not available in the HR Onboarding Pilot system
  5. Click into Helpful Links to view resources available to aid in the Onboarding process

## Lab 2 – Dashboard

1. **Navigate to the HR Onboarding Portal (<https://quspsonboarding.servicenowservices.com/onboarding>) and click 'View All Reports' under 'My Overview' to navigate to the HR Onboarding Dashboard**
2. **Click the Active HR Cases tab and familiarize yourself with the displayed reports:**
  1. Active Cases Count (Number)
  2. Cases by HR Service
  3. HR Service Table
  4. HR Onboarding Cases by Activity Set
  5. RCA/ARC Cases by Activity Set
  6. All Active Cases
  7. NOTE: Try changing the filter conditions to see how the reports are updated based on defined criteria
3. **Click the Active To Dos tab and familiarize yourself with the displayed reports:**
  1. Active To-Dos Count (Number)
  2. Active To-Dos

NOTE: Try changing the filter conditions to see how the reports are updated based on defined criteria

## Lab 3 – Reporting

1. **Navigate to the HR Onboarding Portal (<https://quspsonboarding.servicenowservices.com/onboarding>) and click ‘View All Reports’ under ‘My Overview’ to navigate to the backend view of the HR Onboarding Pilot system**
2. **Type ‘Reporting’ in the filter navigator to navigate to HR Dashboard & Reports > Reports**
3. **Click through the different tabs to familiarize yourself with the different reports available for you to view in the HR Onboarding Pilot system**
  1. My Reports: Reports created by the logged in user
  2. Group: Reports shared with the logged in user via group or user
  3. Global: Reports that are shared as global
  4. All: All reports accessible by the logged in user
4. **Create a new report using the ‘Create a Report’ button**
  1. Data: Populate a name for the report, select ‘Table’ for data source, and select ‘HR Lifecycle Event Cases’ OR ‘HR Tasks’ to generate a report for the HR Onboarding Pilot data
  2. Type: Select a type of report you would like to use to display the data (e.g. Pie Chart, Bar Graph, etc.)
  3. Configure: Select how you would like to group the data.
  4. Style: Update the color palette, size, and format
5. **Click ‘Run’ to generate the report. Make changes as needed and click ‘Save’ to save the report.**
6. **Click ‘Share’ to share the report with a specific group or user**

## Lab 4 – Pre-Boarding Tasks

1. **Navigate to the HR Onboarding Portal (<https://quspsonboarding.servicenowservices.com/onboarding>) and click 'My Requests' to view a list of all open HR Onboarding Requests**
2. **Select a request that is not closed or cancelled. Once the request is displayed, click the 'Pre-Boarding' link under the timeline to view all tasks. Select 'Assigned to Me' under the drop-down in the center of the page. The following tasks will be displayed:**
  1. Enter Report to Unit/Duty Station Details
  2. Contact New Hire regarding job requirements
3. **Click 'Enter Report to Unit/Duty Station Details' task**
  1. Populate the mandatory fields (indicated by a red \*)
  2. Click 'Submit'
  3. Click 'Pre-boarding'
4. **Click 'Contact New Hire regarding job requirements' task**
  1. Familiarize yourself with the displayed information
  2. Click 'Complete'
  3. Click 'Pre-boarding'
5. **Select 'Assigned to Me' under the drop-down in the center of the page. No tasks should be displayed**



## Lab 5 – Day 1 Tasks

1. **Navigate to the HR Onboarding Portal (<https://quspsonboarding.servicenowservices.com/onboarding>) and click 'My Requests' to view a list of all open HR Onboarding Requests**
2. **Select a request that is not closed or cancelled. Once the request is displayed, click the 'Day 1' link under the timeline to view all tasks. Select 'Assigned to Me' under the drop-down in the center of the page. The following tasks will be displayed:**
  1. Schedule Shadow Day with New Hire
3. **Click 'Schedule Shadow Day with New Hire' task**
  1. Populate the mandatory fields (indicated by a red \*)
  2. Click 'Submit'
  3. Click 'Day 1'
4. **Select 'Assigned to Me' under the drop-down in the center of the page. No tasks should be displayed**

## Lab 6 – Week 1 Tasks

1. **Navigate to the HR Onboarding Portal (<https://guspsonboarding.servicenowservices.com/onboarding>) and click 'My Requests' to view a list of all open HR Onboarding Requests**
2. **Select a request that is not closed or cancelled. Once the request is displayed, click the 'Week 1' link under the timeline to view all tasks. Select 'Assigned to Me' under the drop-down in the center of the page. The following tasks will be displayed:**
  1. Schedule Initial Meeting with Supervisor
  2. Prepare for Shadow Day with New Hire
  3. Enter New Hire time into TACS (Week1)
  4. Welcome New Hire to the Unit/Duty Station
  5. Prepare for New Hire's First Day in the Unit/Duty Station
3. **Click 'Prepare for Shadow Day with New Hire' task**
  1. Download the Supervisor Checklist by clicking the second button from the left in the menu (square with downward pointing arrow)
  2. Click 'Accept and Complete' button
  3. Click 'Week 1'
4. **Click 'Enter New Hire time into TACS (Week1)' task**
  1. Familiarize yourself with the displayed information
  2. Click 'Complete'
  3. Click 'Week 1'

## Lab 6 – Week 1 Tasks

### 5. Click 'Welcome New Hire to the Unit/Duty Station' task

1. Download the Welcome New Hire to the Unit/Duty Station Checklist by clicking the second button from the left in the menu (square with downward pointing arrow)
2. Click 'Accept and Complete' button
3. Click 'Week 1'

### 6. Click 'Prepare for New Hire's First Day in the Unit/Duty Station' task

1. Download the Preparing for the first day Checklist by clicking the second button from the left in the menu (square with downward pointing arrow)
2. Click 'Accept and Complete' button
3. Click 'Week 1'

### 7. Select 'Assigned to Me' under the drop-down in the center of the page. No tasks should be displayed

## Lab 7 – Week 2 Tasks

1. **Navigate to the HR Onboarding Portal (<https://quspsonboarding.servicenowservices.com/onboarding>) and click 'My Requests' to view a list of all open HR Onboarding Requests**
2. **Select a request that is not closed or cancelled. Once the request is displayed, click the 'Week 2' link under the timeline to view all tasks. Select 'Assigned to Me' under the drop-down in the center of the page. The following tasks will be displayed:**
  1. Schedule 30-Day Review
  2. Conduct Initial Meeting With Supervisor
  3. Enter New Hire Time into TACS (Week 2)
3. **Click 'Enter New Hire time into TACS (Week 2)' task**
  1. Familiarize yourself with the displayed information
  2. Click 'Complete'
  3. Click 'Week 2'
4. **Click 'Conduct Initial Meeting with Supervisor' task**
  1. Select the Certification Statement
  2. Click 'Submit'
  3. Click 'Week 2'
5. **Click 'Schedule 30 Day Review' task**
  1. Populate the mandatory fields (indicated by a red \*)
  2. Click 'Submit'
  3. Click 'Week 2'
6. **Select 'Assigned to Me' under the drop-down in the center of the page. No tasks should be displayed**

## Lab 8 – Day 30 Tasks

1. **Navigate to the HR Onboarding Portal (<https://guspsonboarding.servicenowservices.com/onboarding>) and click 'My Requests' to view a list of all open HR Onboarding Requests**
2. **Select a request that is not closed or cancelled. Once the request is displayed, click the 'Day 30' link under the timeline to view all tasks. Select 'Assigned to Me' under the drop-down in the center of the page. The following tasks will be displayed:**
  1. Enter ratings and generate review form
  2. Conduct 30-Day Review
  3. Schedule 60-Day Review
3. **Click 'Enter ratings and generate review form' task**
  1. Populate the mandatory fields (indicated by a red \*)
  2. Click 'Submit'
  3. Click 'Day 30'
  4. Click 'Activity' to view the generated form 1750
4. **Click 'Conduct 30-Day Review' task**
  1. Select the Certification Statement and confirm whether or not the new hire signed the review
  2. Click 'Submit'
  3. Click 'Day 30'
5. **Click 'Schedule 60 Day Review' task**
  1. Populate the mandatory fields (indicated by a red \*)
  2. Click 'Submit'
  3. Click 'Day 30'
6. **Select 'Assigned to Me' under the drop-down in the center of the page. No tasks should be displayed**

## Lab 9 – Day 60 Tasks

1. **Navigate to the HR Onboarding Portal (<https://guspsonboarding.servicenowservices.com/onboarding>) and click 'My Requests' to view a list of all open HR Onboarding Requests**
2. **Select a request that is not closed or cancelled. Once the request is displayed, click the 'Day 60' link under the timeline to view all tasks. Select 'Assigned to Me' under the drop-down in the center of the page. The following tasks will be displayed:**
  1. Enter ratings and generate review form
  2. Conduct 60-Day Review
  3. Schedule 80-Day Review
3. **Click 'Enter ratings and generate review form' task**
  1. Populate the mandatory fields (indicated by a red \*)
  2. Click 'Submit'
  3. Click 'Day 60'
  4. Click 'Activity' to view the generated form 1750
4. **Click 'Conduct 60-Day Review' task**
  1. Select the Certification Statement and confirm whether or not the new hire signed the review
  2. Click 'Submit'
  3. Click 'Day 60'
5. **Click 'Schedule 80 Day Review' task**
  1. Populate the mandatory fields (indicated by a red \*)
  2. Click 'Submit'
  3. Click 'Day 60'
6. **Select 'Assigned to Me' under the drop-down in the center of the page. No tasks should be displayed**

## Lab 10 – Day 80 Tasks

1. **Navigate to the HR Onboarding Portal (<https://quspsonboarding.servicenowservices.com/onboarding>) and click 'My Requests' to view a list of all open HR Onboarding Requests**
2. **Select a request that is not closed or cancelled. Once the request is displayed, click the 'Day 60' link under the timeline to view all tasks. Select 'Assigned to Me' under the drop-down in the center of the page. The following tasks will be displayed:**
  1. Enter ratings and generate review form
  2. Conduct 80-Day Review
3. **Click 'Enter ratings and generate review form' task**
  1. Populate the mandatory fields (indicated by a red \*)
  2. Click 'Submit'
  3. Click 'Day 80'
  4. Click 'Activity' to view the generated form 1750
4. **Click 'Conduct 80-Day Review' task**
  1. Select the Certification Statement and confirm whether or not the new hire signed the review
  2. Click 'Submit'
  3. Click 'Day 80'
5. **Select 'Assigned to Me' under the drop-down in the center of the page. No tasks should be displayed**

## Lab 11 – Initiating Separation

1. **Navigate to the HR Onboarding Portal (<https://quspsonboarding.servicenowservices.com/onboarding>) and click 'My Requests' to view a list of all open HR Onboarding Requests**
2. **Select a request that is not closed or cancelled.**
3. **Click the 'Actions' button on the HR case view. The drop-down is expanded and the following values are displayed:**
  1. Send Email
  2. Close Onboarding Case
  3. Reassign Supervisor
  4. Reassign HR Representative
  5. Reassign Training Lead
4. **Click 'Close Onboarding Case'**
  1. Populate the mandatory fields (indicated by red \*)
  2. For Reason of Cancellation, select 'Voluntary Separation - New Hire Initiated' OR 'Involuntary Separation - Employer Initiated'
  3. Read the confirmation statement and check the checkbox
  4. Click 'Close Case'
5. **Click 'Activity' tab near middle of page to confirm an entry was added to indicate Case Closure email was sent to the HR Rep**



## Lab 12 – Communication

1. **Navigate to the HR Onboarding Portal (<https://quspsonboarding.servicenowservices.com/onboarding>) and click 'View All Reports' under 'My Overview' to navigate to the HR Onboarding Dashboard**
2. **Type 'Quick Messages' in the filter navigator**
  1. Select Email Client > Quick Messages
  2. Click 'New'
  3. Populate the mandatory fields, make sure the 'active' field is checked and the table field is populated with 'HR Lifecycle Events Case', and click 'Submit'
3. **Navigate to the HR Onboarding Portal (<https://quspsonboarding.servicenowservices.com/onboarding>) and click 'My Requests' to view a list of all open HR Onboarding Requests**
4. **Select a request that is not closed or cancelled.**

## Lab 12 – Communication

5. **Click the 'Actions' button on the HR case view. The drop-down is expanded and the following values are displayed:**
  1. Send Email
  2. Close Onboarding Case
  3. Reassign Supervisor
  4. Reassign HR Representative
  5. Reassign Training Lead
6. **Click 'Send Email'**
  1. Click the Quick Messages drop-down on top right
  2. Populate the 'To' field and click 'Send'
7. **Click 'Activity' tab near middle of page to confirm an entry was added to indicate the email was sent**

## Lab 13 – Reassignment

1. **Navigate to the HR Onboarding Portal (<https://quspsonboarding.servicenowservices.com/onboarding>) and click ‘My Requests’ to view a list of all open HR Onboarding Requests**
2. **Select a request that is not closed or cancelled.**
3. **Click the ‘Actions’ button on the HR case view. The drop-down is expanded and the following values are displayed:**
  1. Send Email
  2. Close Onboarding Case
  3. Reassign Supervisor
  4. Reassign HR Representative
  5. Reassign Training Lead
4. **Click ‘Reassign Supervisor’**
  1. Select a user to reassign as Supervisor on the case
  2. Click ‘Save’

## Lab 14 – Submitting a Support Request

1. **Navigate to the HR Onboarding Portal (<https://quspsonboarding.servicenowservices.com/onboarding>) and click 'My Support Requests' on the top right**
2. **Select a 'Submit a Support Request'**
3. **Populate the mandatory fields (indicated by the red \*) and click 'Submit'**

# HR Onboarding Pilot

Trainer

## Expectations: Before We Begin



- Be engaged.
- Ask questions in the chat.
- Please mute your phones/microphones.
- Please do NOT place us on hold/multitask.
- This is your training!

## Objective & Goals

By the end of the training session, participants will:

- ✓ Understand the role of the Trainer as it pertains to the HR Onboarding Pilot
- ✓ Be familiar with the following:
  - ✓ How to access and navigate the different widgets on the HR Onboarding Pilot Training Portal
  - ✓ How to create, schedule, and mark attendance for training sessions through individual cases and through bulk updates from the training widget
  - ✓ How to access and monitor the HR Onboarding Dashboard
  - ✓ How to access and report on a list of ALL Onboarding cases
  - ✓ How to access and take action on tasks assigned to the Trainer in the Onboarding Lifecycle Event (e.g. schedule and mark attendance for trainings)
  - ✓ How to initiate reassignment of the HR Lead associated to an Onboarding case
  - ✓ How to monitor communications (e.g. work notes and emailss) associated to HR Onboarding cases
  - ✓ How to communicate with new hire, Supervisor, and HR Leads from the system via direct messages (emails)
  - ✓ How to communicate with HR Lead, Supervisor, and other Trainers through work notes and comment on the HR case
  - ✓ How to create and access quick messages

## Course Modules

Module	Topic Covered	Est. Time (min)
1.	Portal (Homepage widgets, My Requests Page, My To-Dos Page, My Team Page, Helpful Links, Training Widget)	10
2.	Dashboard & Reporting (Navigating to Dashboard, Dashboard tabs, Dashboard filters)	5
3.	Workflow	15
	3.1 Pre-Boarding	
	3.2 Week 1 Tasks	
	3.3 Week 2 Tasks	
4.	Closing a ServiceNow HR Onboarding cases	5
5.	Communications (Creating quick messages & using them from Actions UI)	10
6.	Reassignment	5
7.	Submitting a Support Request	5
8.	Labs/Activities	65






## Project Overview – HR Onboarding Pilot

### Project Overview

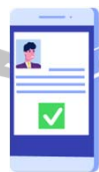
The HR Onboarding Pilot's goal is to create standardized, repeatable, and automated workflows and processes for onboarding procedures and probationary activities for two pilot districts (Maine-New Hampshire-Vermont and South Carolina) for non-career and bargaining positions. It will support automated, electronic means for action and milestone tracking while increasing visibility for the managers and HR professionals tasked with delivering the appropriate communications, training, and performance feedback for new hires.

### Timeline

FY21		FY22					
	SEP	OCT		NOV		DEC	
Pilot Training (9/7-16)							
Pilot (9/17 – 12/31)							
Analyze Results and Feedback							

# Project Overview – HR Onboarding Pilot

*I accepted my offer am looking forward to receiving information on next steps.*



## PRE-BOARDING

*I am eager to get started; The Orientation Letter confirmed my position, unit, and details of my Orientation. The New Hire site makes everything very straightforward.*

## DAY 1 (OF ORIENTATION)

*I was able to complete the "Welcome to USPS" training without issue. The Orientation team was very helpful and well-coordinated.*



## WEEK 1

*There was lots to do this week, Onboarding Forms, Driver Training, and additional Orientation Training, but so far everything is going very smoothly.*

## 30 DAY

*My Supervisor has provided me with very clear feedback, and I was able to clarify my questions and expectations without issue.*



## WEEK 2

*I'm excited to finally take part in a Shadow Day and On the Job training to learn more about my job.*



## 60 DAY

*I'm glad I had the opportunity to improve since the previous review. My second review went exactly as I expected.*



## 90 DAY

*Finally! My last review went well, and I am a part of the team. The whole process went smoother than I expected.*



## 80 DAY

*I'm glad I had the opportunity to improve since the previous review. My third review went exactly as I expected.*



**NOTE: RCA/ARCs will end System Process at the end of Week 2**

**NOTE: Shadow Days only apply to newly hired city and rural carriers. If the Shadow Day is not applicable to a newly hired employee, you do not need to complete the action in the HR Onboarding Pilot System**

## HR Representative Roles & Responsibilities



SCHEDULE AND MAINTAIN TRAINING  
SESSIONS



ORIENTATION AND TRAINING OF NEW  
HIRES



COORDINATING WITH HRSSC, HR  
REPRESENTATIVES, AND SUPERVISORS  
TO TRACK ONBOARDING PROGRESS

# Module 1

HR Onboarding Portal

## Portal – URL and Access

- **Environment URL and Access:**
  - Onboarding Portal
    - CAT URL: <https://quspsonboarding.servicenowservices.com/onboarding>
    - PROD URL: <https://uspsonboarding.servicenowservices.com/onboarding>
  - Training Portal
    - CAT URL: <https://quspsonboarding.servicenowservices.com/training>
    - PROD URL: <https://uspsonboarding.servicenowservices.com/training>
- All HR Pilot users will have access prior to go-live. However, if users need access to the system after go-live, they can request access following these steps:
  - To request access, email the HR coordinators. HR Coordinators will submit a Support Request in the HR Onboarding Pilot system. The HR Onboarding Pilot Tier 2 team will grant access and notify the HR coordinators. HR Coordinators will notify the users.

## Training Widget – Scheduling a Session

The HR Onboarding “Training Widget” provides a convenient method for Trainers to create, schedule, and mark attendance for orientation and training sessions in bulk

### Schedule a Training Session:

- Trainers can use this functionality to schedule/create various training sessions

The screenshot shows the 'Schedule a Training Session' form. At the top, there's a title bar 'Schedule a Training Session'. Below it, a navigation bar has three tabs: 'Training Details' (active), 'Attendees', and 'Summary'. The main section is titled 'New Training Session' with a subtitle 'New Training Session'. It contains several input fields: 'Date/Time' with a calendar icon, 'Location' with a dropdown arrow, 'Training Type' with a dropdown arrow, 'Training Facilitator' with a dropdown arrow, 'Course Title' with a text input, and 'Course Description' with a text input. At the bottom right is a 'Submit' button. At the bottom center is a link 'Add attachments' with a paperclip icon.

### Add Attendees:

- Trainers can add attendees while they are creating the training as well as at a later time

The screenshot shows the 'Attendees' table. At the top, there's a title bar 'Attendees' with a close button 'x'. Below it is a search bar with the placeholder text 'Search'. A note below the search bar says 'Search bar can be used to look for new hires by name, position, occupation code, designation/activity code, location, effective date, or HR Rep.' Below the note is an 'Add Selected' button. The table has the following columns: Name, Position, Occupation Code, Designation/Activity Code, Location, Effective Date, and HR Rep. The table contains six rows of data, each with a checkbox in the first column.

	Name	Position	Occupation Code	Designation/Activity Code	Location	Effective Date	HR Rep
<input type="checkbox"/>	Tomsof Anna	PSE SALES & SVCS/DISTRIBUTION ASSOCIATE	2395-0017	120	33054-ROYAL PALM-1449534	2021-04-01	SC HR Representative
<input type="checkbox"/>	Tomsof Anna		2325-07XX	120	30320-PEACHTREE-1352485	2021-04-11	NH HR Representative
<input type="checkbox"/>	Barbara Na	City Carrier Assistant 1	2310-0045	814	29020-CAMDEN-1356735	2021-04-25	SC HR Representative
<input type="checkbox"/>	Sahadat Campbell	City Carrier Assistant 1	2310-0045	814	29009-BETHUNE-1354843	2021-04-25	SC HR Representative
<input type="checkbox"/>	Prinda Edwards I	City Carrier Assistant 1	2310-0045	813	29020-CAMDEN-1356735	2021-04-25	SC HR Representative
<input type="checkbox"/>	PAMSmhaeleven TwentyFour	MAIL HANDLER ASSISTANT	2315-0085	813	29009-BETHUNE-1354843	2021-04-25	SC HR Representative

# Training Widget – Managing Sessions & Attendance

**The HR Onboarding “Training Widget” provides a convenient method for Trainers to create, schedule, and mark attendance for orientation and training sessions in bulk**

## Edit Session Details:

- Trainers can change details of the session (e.g., in case of rescheduling a training)

The screenshot shows the 'Edit Session Details' form for the 'City Carrier Academy' training. The form includes fields for Course Title, Location, Training Type, Date/Time, Facilitator, and Training Hours. A 'Save (Ctrl + s)' button is at the bottom right.

Field	Value
Course Title	City Carrier Academy
Location	03034-CANDIA-1356848
Training Type	City Carrier Academy
Date/Time	2021-08-03 09:00:09
Facilitator	Brock Sizer
Training Hours	

## Mark Attendance:

- Trainers can add or remove attendees as well as mark their attendance (including hours)

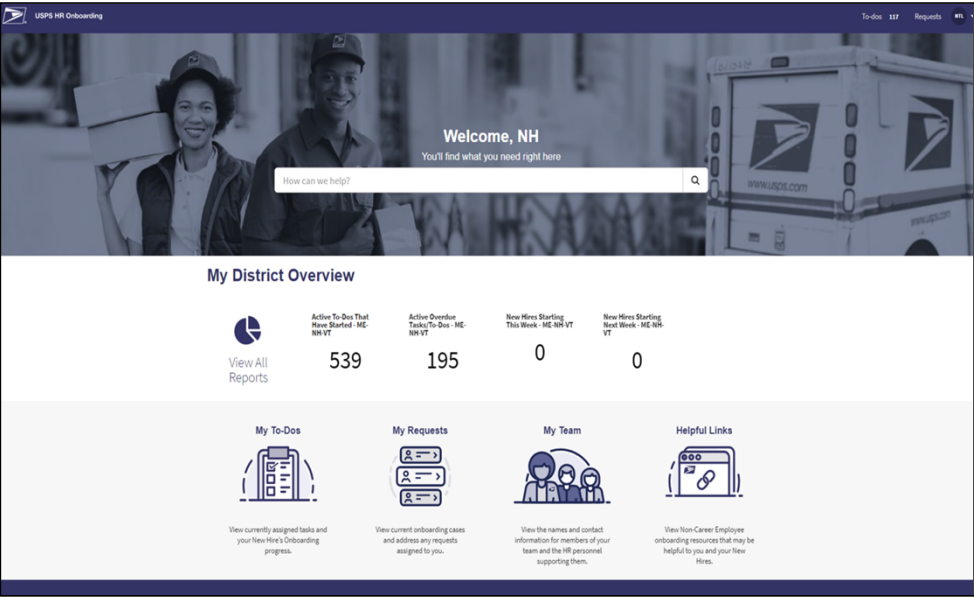
The screenshot shows the 'Mark Attendance' table with columns for Attendee Name, ID, Effective Date, Hours, and Notes. The table lists six attendees with their respective details. At the bottom right, there are buttons for 'Edit Attendees' and 'Log Attendance and Close Training'.

Attendee Name	ID	Effective Date	Hours	Notes
Nick Perez	04101-ME-NH-VT-1434697	Effective 2021-05-30	hrs	
Lisa Samuel City Carrier Assistant 1	03033-BROOKLINE-1356020	Effective 2021-05-22	hrs	
Tyra Banks RURAL CARR ASSOC/SRV REG RTE	03042-EPPING-1362675	Effective 2021-06-05	hrs	
Twyla Cordova PSE SALES & SVCS/DISTRIBUTION ASSOCIATE	51006-BATTLE CREEK-1354205	Effective 2021-05-31	hrs	
Hsialin Allen ASSISTANT RURAL CARRIER (ARC)	29045-ELGIN-1362260	Effective 2021-04-28	hrs	
Jia Saloni City Carrier Assistant 2	03049-HOLLIS-1367208	Effective 2021-05-07	hrs	

# Portal

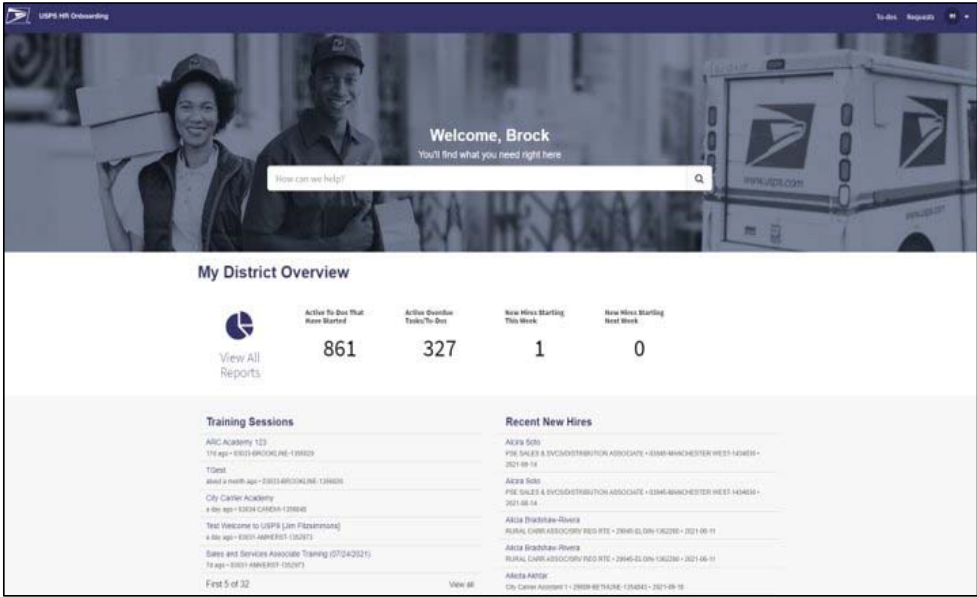
## Onboarding Portal

Supervisors will access the Pilot through the Onboarding Portal



## Training Portal

Trainers and HR Representatives will access the Pilot through the Training Portal





# Module 2

## Dashboard & Reporting

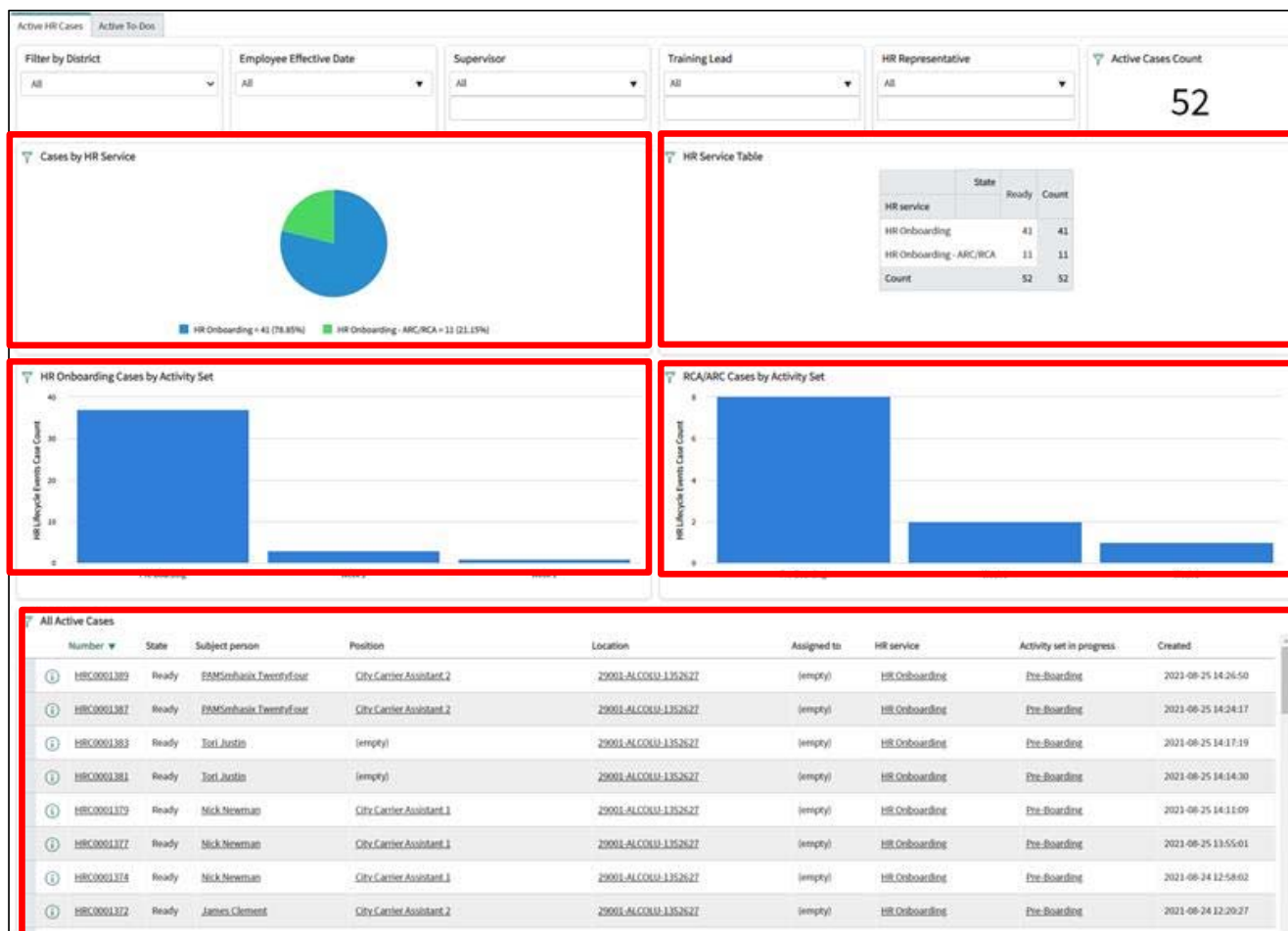
# Dashboard & Reporting – Active HR Cases

## • Metrics

- Active Cases Count (Number)
- Cases by HR Service
- HR Service Table
- Onboarding Cases by Activity Set
- RCA/ARC Cases by Activity Set
- All Active Cases

## • Filters

- District
- Employee Effective Date
- Supervisor
- HR Representative
- Training Lead



## Dashboard & Reporting – Active To-Dos

- **Metrics/Reports**

- Active To-Dos That Have Started
- All Active To-Dos

- **Filters**

- District
- Employee Effective Date
- Assigned To
- Due Date

Active HR Cases

Active To-Dos

Filter To-Dos by District

All

Assigned to

All

Employee Effective Date

All

Due Date

Last 7 days

Active To-Dos That Have Started

458

Active To-Dos

Number	Parent	Subject person	Short description	Position	Location	State	Assigned to	Due date
① HRT0004799	HRC0001315	Lisa Samuel	Enter ratings and generate 60-day review form	City Carrier Assistant 1	03033-BROOKLINE-1356020	Ready	NH Supervisor	2021-07-23 00:00:00
① HRT0004797	HRC0001315	Lisa Samuel	Determine if New Hire should be removed from rolls	City Carrier Assistant 1	03033-BROOKLINE-1356020	Ready	NH HR Representative	2021-07-23 00:00:00
① HRT0004800	HRC0001315	Lisa Samuel	Participate in 60 Day Review	City Carrier Assistant 1	03033-BROOKLINE-1356020	Ready	Lisa Samuel	2021-07-23 00:00:00
① HRT0004786	HRC0001315	Lisa Samuel	Schedule 80-Day Review	City Carrier Assistant 1	03033-BROOKLINE-1356020	Ready	NH Supervisor	2021-07-23 00:00:00
① HRT0004798	HRC0001315	Lisa Samuel	Conduct 60-Day Review	City Carrier Assistant 1	03033-BROOKLINE-1356020	Ready	NH Supervisor	2021-07-23 00:00:00
① HRT0003961	HRC0001249	Martha Gamblin	Prepare for Orientation	ASSISTANT RURAL CARRIER (ARC)	29041-DAVIS STATION-1437129	Ready	Martha Gamblin	2021-07-23 18:52:14
① HRT0003984	HRC0001251	Alleda Akhtar	Contact New Hire regarding job requirements	City Carrier Assistant 1	29009-BETHUNE-1354843	Ready	SC Supervisor	2021-07-23 18:52:20
① HRT0003965	HRC0001251	Alleda Akhtar	Prepare for Orientation	City Carrier Assistant 1	29009-BETHUNE-1354843	Ready	Alleda Akhtar	2021-07-23 18:52:20
① HRT0003979	HRC0001251	Alleda Akhtar	Send New Hire Travel & Booking information if required	City Carrier Assistant 1	29009-BETHUNE-1354843	Ready	SC HR Representative	2021-07-23 18:52:20
① HRT0003978	HRC0001251	Alleda Akhtar	Enter Report to Unit/Duty Station Details	City Carrier Assistant 1	29009-BETHUNE-1354843	Ready	SC Supervisor	2021-07-23 18:52:25

**NOTE:** HR Onboarding Pilot fulfiller users (Supervisors, Trainers, HR Representatives) can create their own reports and share the report with specific users and/or groups. Instructions in the corresponding Lab.

# Module 3

Workflow

# Project Overview - USPS HR Onboarding Pilot Journey Map

*I accepted my offer am looking forward to receiving information on next steps.*



## DAY 1 (OF ORIENTATION)

*I was able to complete the "Welcome to USPS" training without issue. The Orientation team was very helpful and well-coordinated.*

## WEEK 2

*I'm excited to finally take part in a Shadow Day and On the Job training to learn more about my job.*

**NOTE: RCA/ARCs will end System Process at the end of Week 2**

## PRE-BOARDING

*I am eager to get started; The Orientation Letter confirmed my position, unit, and details of my Orientation. The New Hire site makes everything very straightforward.*

## WEEK 1

*There was lots to do this week, Onboarding Forms, Driver Training, and additional Orientation Training, but so far everything is going very smoothly.*

## 30 DAY

*My Supervisor has provided me with very clear feedback, and I was able to clarify my questions and expectations without issue.*

## 60 DAY

*I'm glad I had the opportunity to improve since the previous review. My second review went exactly as I expected.*

## 90 DAY

*Finally! My last review went well, and I am a part of the team. The whole process went smoother than I expected.*

## 80 DAY

*I'm glad I had the opportunity to improve since the previous review. My third review went exactly as I expected.*

**NOTE: Shadow Days only apply to newly hired city and rural carriers. If the Shadow Day is not applicable to a newly hired employee, you do not need to complete the action in the HR Onboarding Pilot System**

## Workflow – Pre-Boarding Tasks

### Schedule New Hire for Welcome to USPS Orientation (if applicable):

Trainers will use this task to schedule the date a New Hire has their Welcome to USPS Orientation.

HR Onboarding: Alleda Akhtar

Actions

AA New Hire  
Alleda Akhtar  
Effective Date  
2021-09-18

SS Supervisor  
SC Supervisor  
Employment Type  
Non-Career Employee

SHR HR Rep  
SC HR Representative  
Position  
City Carrier Assistant 1

STL Training Rep  
SC Training Lead  
Location  
29009-BETHUNE-1354843

Tasks/To-Dos Activity Attachments

Pre-Boarding

Schedule Safe Driver Program  
Overdue 4 days

Schedule Welcome to the USPS Train...  
Overdue 4 days

Schedule City Carrier On-the-Job Trai...  
Overdue 4 days

Schedule City Carrier Academy  
Overdue 4 days

Schedule Welcome to the USPS Training  
HRT0003983 Overdue 4 days

Attachments History

Ask a Question

HRT0003983 Schedule Welcome to the USPS Training

Choose Existing Training Session

To schedule this new hire's Welcome to USPS Orientation, you can select an upcoming session, or you can schedule a new session:

Cancel Save Submit

## Workflow – Pre-Boarding Tasks

### Schedule New Hire \_\_\_\_ Training:

Trainers will use this task to schedule the New Hire for their various training(s).

The screenshot displays the 'HR Onboarding: Alleda Akhtar' interface. At the top, there are four user roles: New Hire (Alleda Akhtar), Supervisor (SC Supervisor), HR Rep (SC HR Representative), and Training Rep (SC Training Lead). Below these, key information is listed: Effective Date (2021-09-18), Employment Type (Non-Career Employee), Position (City Carrier Assistant 1), and Location (29009-BETHUNE-1354843). The main section is divided into 'Tasks/To-Dos', 'Activity', and 'Attachments'. Under 'Tasks/To-Dos', a list of tasks is shown, with 'Schedule City Carrier Academy' (HRT0003981, Overdue 10 days) highlighted by a red box. To the right, a modal window for 'HRT0003981 Schedule City Carrier Academy' is open, also highlighted by a red box. This modal contains the heading 'Choose Existing Training Session', a brief instruction, a dropdown menu for selecting a session, and 'Cancel', 'Save', and 'Submit' buttons.

HR Onboarding: Alleda Akhtar

AA New Hire  
Alleda Akhtar

SS Supervisor  
SC Supervisor

SHR HR Rep  
SC HR Representative

STL Training Rep  
SC Training Lead

Effective Date  
2021-09-18

Employment Type  
Non-Career Employee

Position  
City Carrier Assistant 1

Location  
29009-BETHUNE-1354843

Tasks/To-Dos Activity Attachments

Pre-Boarding

Schedule City Carrier Academy  
HRT0003981 Overdue 10 days

Attachments History Ask a Question

Schedule Safe Driver Program  
Overdue 10 days

Schedule Welcome to the USPS Train...  
Overdue 10 days

Schedule City Carrier On-the-Job Trai...  
Overdue 10 days

Schedule City Carrier Academy  
Overdue 10 days

HRT0003981 Schedule City Carrier Academy

Choose Existing Training Session

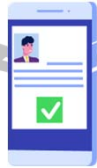
To schedule this new hire's City Carrier Academy, you can select an upcoming session, or you can schedule a new session:

Cancel Save Submit

**NOTE:** Depending on the New Hire's occupation code and training plan, this may include more than one task.

# Project Overview - USPS HR Onboarding Pilot Journey Map

*I accepted my offer am looking forward to receiving information on next steps.*



## PRE-BOARDING

*I am eager to get started; The Orientation Letter confirmed my position, unit, and details of my Orientation. The New Hire site makes everything very straightforward.*

## DAY 1 (OF ORIENTATION)

*I was able to complete the "Welcome to USPS" training without issue. The Orientation team was very helpful and well-coordinated.*



## WEEK 1

*There was lots to do this week, Onboarding Forms, Driver Training, and additional Orientation Training, but so far everything is going very smoothly.*

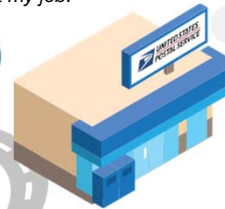
## 30 DAY

*My Supervisor has provided me with very clear feedback, and I was able to clarify my questions and expectations without issue.*



## WEEK 2

*I'm excited to finally take part in a Shadow Day and On the Job training to learn more about my job.*



## 60 DAY

*I'm glad I had the opportunity to improve since the previous review. My second review went exactly as I expected.*



## 90 DAY

*Finally! My last review went well, and I am a part of the team. The whole process went smoother than I expected.*



## 80 DAY

*I'm glad I had the opportunity to improve since the previous review. My third review went exactly as I expected.*



**NOTE: RCA/ARCs will end System Process at the end of Week 2**

**NOTE: Shadow Days only apply to newly hired city and rural carriers. If the Shadow Day is not applicable to a newly hired employee, you do not need to complete the action in the HR Onboarding Pilot System**



## Workflow – Week 1 Tasks

### Mark Attendance for Welcome to USPS Orientation (if applicable):

This task will allow the Trainer to capture attendance and hours of attendance for the New Hire's Welcome to USPS Orientation.

HR Onboarding: Alleda Akhtar

AA New Hire Alleda Akhtar  
Effective Date: 2021-09-18

SS Supervisor SC Supervisor  
Employment Type: Non-Career Employee

SHR HR Rep SC HR Representative  
Position: City Carrier Assistant 1

STL Training Rep SC Training Lead  
Location: 29009-BETHUNE-1354843

Tasks/To-Dos Activity Attachments

< Week 1

Mark Attendance for Welcome to the ...  
Overdue 3 days

Mark Attendance for Safe Driver Prog...  
Overdue 3 days

Mark Attendance for Welcome to the USPS Training  
HRT0003971 Overdue 3 days

Attachments History Ask a Question

HRT0003971 Mark Attendance for Training

Number of Hours Attended

Employee's Completion Status  
-- Choose --

Notes

Cancel Save Submit

**NOTE:** Depending on the New Hire's occupation code and training plan, this may include more than one task.

## Workflow – Week 1 Tasks

### Mark Attendance for \_\_\_\_ Training:

This task will allow the Trainer to capture attendance and hours of attendance for the New Hire's various training(s).

HR Onboarding: Alleda Akhtar

AA New Hire  
Alleda Akhtar  
Effective Date  
2021-09-18

SS Supervisor  
SC Supervisor  
Employment Type  
Non-Career Employee

SHR HR Rep  
SC HR Representative  
Position  
City Carrier Assistant 1

STL Training Rep  
SC Training Lead  
Location  
29009-BETHUNE-1354843

Tasks/To-Dos Activity Attachments

< Week 1

Mark Attendance for Welcome to the ...  
Overdue 3 days

Mark Attendance for Safe Driver Prog...  
Overdue 3 days

Mark Attendance for Safe Driver Program  
HRT0003975 Overdue 3 days

Attachments History Ask a Question

HRT0003975 Mark Attendance for Safe Driver Program

Number of Hours Attended

Employee's Completion Status  
-- Choose --

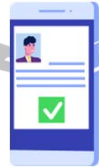
Notes

Cancel Save Submit

**NOTE:** Depending on the New Hire's occupation code and training plan, this may include more than one task.

# Project Overview - USPS HR Onboarding Pilot Journey Map

*I accepted my offer am looking forward to receiving information on next steps.*



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*There was lots to do this week, Onboarding Forms, Driver Training, and additional Orientation Training, but so far everything is going very smoothly.*

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*I'm excited to finally take part in a Shadow Day and On the Job training to learn more about my job.*



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**NOTE: RCA/ARCs will end System Process at the end of Week 2**

**NOTE: Shadow Days only apply to newly hired city and rural carriers. If the Shadow Day is not applicable to a newly hired employee, you do not need to complete the action in the HR Onboarding Pilot System**

## Workflow – Week 2 Tasks

### Mark Attendance for \_\_\_\_ Training:

This task will allow the Trainer to capture attendance and hours of attendance for the New Hire's various training(s).

The screenshot displays the HR Onboarding interface for Alleda Akhtar. At the top, a header bar shows 'HR Onboarding: Alleda Akhtar' and an 'Actions' dropdown. Below this, a summary section lists key roles and details: New Hire (Alleda Akhtar, Effective Date: 2021-09-18), Supervisor (SC Supervisor), HR Rep (SC HR Representative, Position: City Carrier Assistant 1), and Training Rep (SC Training Lead, Location: 29009-BETHUNE-1354843). The main content area is divided into 'Tasks/To-Dos', 'Activity', and 'Attachments' tabs. Under 'Tasks/To-Dos', a list shows 'Mark Attendance for City Carrier Academy' (HRT0003988, Due in 4 days) and 'Mark Attendance for City Carrier On-t...'. The selected task is expanded, showing a form with fields for 'Number of Hours Attended', 'Employee's Completion Status' (a dropdown menu), and 'Notes'. The form is titled 'HRT0003988 Mark Attendance for City Carrier Academy' and includes 'Cancel', 'Save', and 'Submit' buttons at the bottom.

**NOTE:** Depending on the New Hire's occupation code and training plan, this may include more than one task.

# Module 4

## Initiating Separation

# Closing a ServiceNow HR Onboarding Case

The screenshot shows the ServiceNow HR Onboarding Case interface for Gerardo Li. The case details include: New Hire (GL), Gerardo Li; Supervisor (SS), SC Supervisor; HR Rep (SHR), SC HR Representative; Effective Date: 2021-10-19; Employment Type: Non-Career Employee; Position: MAIL M...; and a reference number 657. The 'Actions' menu is open, showing options: Close Onboarding Case, Send Email, Reassign Supervisor, Reassign HR Representative, and Reassign Training Lead. The 'Close Case' dialog box is displayed, containing the following text:

**Close Case**

Only proceed with taking the action if:

1. You want to stop the New Hire's Onboarding or the probationary period for this New Hire has ended.
2. You want to close the Onboarding case.

If you are closing this case due to separation...

This will not initiate a Separation request, follow the appropriate process outside this system to ensure the New Hire is removed from Rolls. Instructions for processing separations can be found at <https://blue.usps.gov/hr/hrssc-info/separations/>

Reason for Closing Case:

Voluntary Separation - New Hire Initiated

Additional Notes

Last day worked: 7/30/2021

☒ I confirm that a separation request has been initiated outside this system per the USPS guidelines, these details look correct and this onboarding case will be closed.

Cancel OK

**Closure Reason:**  
When closing a case, the user must identify a reason. Provide additional high-level notes if "Other" is selected (example "Duplicate record").

## Auto-Close:

ServiceNow HR Onboarding cases for non-ARC/RCA's will close automatically at the end of the New Hire's probationary period.

## Manual Closure:

- 1) ServiceNow HR cases for ARC/RCA's must be closed manually after training is complete.
- 2) ServiceNow HR cases for any New Hire must be closed manually in the event of a separation from USPS.

# Module 5

## Communications

## Communication – Sending an Email

**HR Pilot users** can send an email to other HR Pilot users, through the case\*. The email will be tracked in the case notes.

The screenshot displays the 'HR Onboarding: Gerardo Li' case page. At the top, there are tabs for 'New Hire', 'Supervisor', 'HR Rep', and 'Training'. Below these, fields for 'Effective Date' (2021-10-19), 'Employment Type' (Non-Career Employee), and 'Position' are visible. A 'Tasks/To-Dos' section on the left shows a timeline with 'Pre-Boarding', 'Day 1', 'Week 1', and 'Week 2'. A 'Compose Email' window is open in the foreground, showing fields for 'Reply to', 'To' (SC Training Lead; Add Recipient), 'Cc' (SC Supervisor; Add Recipient), 'Bcc' (Add Recipient), and 'Subject' (HRC0001309 - HR Onboarding: Doing Great!). The email body contains the text 'I just wanted to let you know that they have been doing a fantastic job! A+ hire!'. In the top right corner, an 'Actions' dropdown menu is open, with 'Send Email' highlighted. Other options in the menu include 'Close Onboarding Case', 'Reassign Supervisor', 'Reassign HR Representative', and 'Reassign Training Lead'.

**\*NOTE:** This feature should *ONLY* be used to communicate with other HR Pilot Users (Supervisors, Trainers, HR Representatives). This feature should *NOT* be used to communicate with the New Hires



## Communication – Updating ServiceNow HR Onboarding Case Notes

**HR Pilot users** can add notes to a case using the activity tab. For example, a Trainer and Supervisor might use these notes to coordinate on rescheduling training.

The screenshot displays the ServiceNow HR Onboarding case interface. At the top, the breadcrumb navigation shows 'Home' and 'My Request'. The case details include the Number 'HRC0001309', Created '9d ago', Updated '18h ago', and State 'Ready'. The case title is 'HR Onboarding: Gerardo Li'. Below this, a summary section lists key roles and details: New Hire Gerardo Li (Effective Date: 2021-10-19), Supervisor SC Supervisor (Employment Type: Non-Career Employee), HR Rep SC HR Representative (Position: MAIL HANDLER ASSISTANT), and Training Rep SC Training Lead (Location: 29037-CHAPPELLS-1357657). The main section has three tabs: 'Tasks/To-Dos', 'Activity' (which is selected and highlighted with a red box), and 'Attachments'. The 'Activity' tab contains a text input field with the placeholder 'Type your message here...' and a 'Post' button, both highlighted with a red box. Below the input field, a message from 'SC Training Lead' (SL) is shown, stating: 'Messages posted on the activity tab will be saved to the case notes and can be seen by all user types!'. The message is timestamped 'just now' and includes a link for 'Additional comments'.

**NOTE:** These notes will not be emailed to user. They will only be kept in the activity tab ServiceNow HR Onboarding.

## Communication – Notes on System Generated Emails

### Automated/System Generated Emails

- Pre-defined, system generated emails will be sent to the HR Onboarding Pilot users throughout the Onboarding Process.
  - Emails to the New Hire will be sent to their personal email address.
  - **Emails will not be sent to the New Hire on or after their effective date.**
- Users can validate that these emails have been sent out via the Activity tab of the case.
- System generated emails will not be sent when a task is assigned:
  - New Hires will receive\* emails for certain orientations and trainings
  - Reminder emails will be sent to Supervisors when it is time to schedule certain meetings
  - Emails will be sent for tasks that have not been completed within two days of its due date

***\*NOTE:** If the task is completed prior to the New Hire's effective date, a system generated email containing the relevant information will be sent. However, if the task is completed past the New Hire's effective date, no system generated email will be sent to the New Hire and it will be the responsibility of the Supervisor, Trainer, or HR Representative to communicate the relevant information to the New Hire outside the HR Onboarding Pilot system. Users should not send any email to the New Hire from the system after the New Hire's effective date.*

# Module 6

## Reassigning a Case

## Reassigning a Case

**HR Pilot users** can reassign a set of tasks of a case to a new user

**Tasks are assigned to one of three types of users:**

- 1) Supervisors
- 2) HR Representatives
- 3) Training Leads

The screenshot displays the 'HR Onboarding: Gerardo Li' interface. At the top, there are four role cards: GL New Hire Gerardo Li, SS Supervisor SC Supervisor, SHR HR Rep SC HR Representative, and STL Training Rep SC Training Lead. Below these, a 'Tasks/To-Dos' tab is active, showing a timeline with tasks: Pre-Boarding, Day 1, Week 1, Week 2 (highlighted), Day 30, Day 60, and Day 80. A modal titled 'Select User to Reassign' is open, featuring a 'Select User:' dropdown menu with 'NH HR Representative' selected. A 'Submit' button is located at the bottom right of the modal. In the top right corner, an 'Actions' dropdown menu is open, listing options: 'Close Onboarding Case', 'Send Email', 'Reassign Supervisor', 'Reassign HR Representative', and 'Reassign Training Lead'. Red boxes highlight the 'Actions' dropdown, the 'Reassign HR Representative' option, the 'NH HR Representative' selection in the modal, and the 'Submit' button.

# Module 7

Submitting a Support Request

# Submitting a Support Request

**HR Pilot users** can submit a support request

**The following information is required to create a support request:**

- 1) District
- 2) Support Type
- 3) Opened For
- 4) Short Description
- 5) Description

The screenshot shows the 'HR Portal IT Support Request' form. At the top right, there is a navigation bar with 'To-dos 496', 'Requests', and 'Support Requests' (highlighted with a red box and a circled '1'). Below 'Support Requests' is a button 'Submit a Support Request' (highlighted with a red box and a circled '2') and a link 'My Support Requests'. The main form area has a title 'HR Portal IT Support Request' and a subtitle 'Ask a question about the HR portal'. A red box highlights the form fields, with a circled '3' pointing to the 'Opened for' field. The fields are: '\* Select District' (dropdown menu showing 'ME-NH-VT'), '\* Support Type' (dropdown menu showing 'Supervisor'), '\* Opened for' (dropdown menu showing 'Brock Sizer'), '\* Short Description' (text area with 'Can't see New Hire - John Doe'), and '\* Description' (text area with 'When searching for my New Hire via the My Requests page, my New Hire, John Doe, does not appear in the list.'). At the bottom right of the form is a button 'Submit' (highlighted with a red box and a circled '4') and a link 'Add attachments'.

# Module 8

Labs/Activities

## Lab / Activities

Lab/ Activity #	Topic Covered	Est. Time (min)
1.	Portal (Homepage widgets, My Requests Page, My To-Dos Page, My Team Page, Helpful Links)	10
2.	Training Widget (Scheduling training, updating training sessions, bulk updates for attendance)	10
3.	Dashboard (Navigating to Dashboard, Dashboard tabs, Dashboard filters)	5
4.	Reporting (Running/Creating ad-hoc reports)	5
5.	Pre-Boarding Tasks (Scheduling Training)	10
6.	Week 1 Tasks (Training Attendance)	10
7.	Week 2 Tasks (Training Attendance)	10
8.	Closing a ServiceNow HR Onboarding cases	5
9.	Communications (Creating quick messages & using them from Actions UI)	10
10.	Reassignment	5
11.	Submitting a Support Request	5



## Lab 1 – Onboarding Portal

1. **Navigate to the HR Onboarding Portal** (<https://guspsonboarding.servicenowservices.com/onboarding>)
2. **Click through the different widgets on the homepage to familiarize yourself with the portal**
  1. Search for New Hires through the search bar on the homepage
  2. Click into My Requests and My To-Dos to familiarize yourself with the layout of the tasks/activities assigned to the logged in user
  3. Click into My Teams to better understand your team structure  
NOTE: Direct reports and managers may not visible to all users as the data is not available in the HR Onboarding Pilot system
  4. Click into Helpful Links to view resources available to aid in the Onboarding process

## Lab 2 – Training Widget

### 1. **Schedule a Training Session & Add Attendees Simultaneously**

1. On the Homepage, click the 'Schedule a Training Session' button (under the 'Training Sessions' and 'Recent New Hires' sections)
2. Complete the required fields (Course Title, Location, Training Type, Date/Time, Facilitator)
3. Click 'Submit'
4. If you are not adding attendees at this time, skip to the next step. Otherwise, click 'Add Attendees,' then search for the New Hires you would like to include in this training and select their checkboxes. When finished, click 'Add Selected.'
5. Click "Next: Review Summary & Confirm"
6. Review your selections. Once confirmed, click 'Finish.'

## Lab 2 – Training Widget (cont.)

### 2. Edit existing Training Session details

1. On the Homepage, click the 'View All' link under (at the bottom of the 'Training Sessions' section)
2. Find and select the Session to which you would like to add attendees
3. Click 'Edit Training Details'
4. Edit training session details as you see fit
5. Click 'Save'
6. Use your browser's 'back' button to return to the training session summary page

## Lab 2 – Training Widget (cont.)

### 3. Add attendees to an existing Training Session

1. On the Homepage, click the 'View All' link under (at the bottom of the 'Training Sessions' section)
2. Find and select the Session to which you would like to add attendees
3. Click 'Edit Attendees'
4. Click 'Add Attendees,' then search for the New Hires you would like to include in this training and select their checkboxes. When finished, click 'Add Selected.'
5. Click "Next: Review Summary & Confirm"
6. Review your selections. Once confirmed, click 'Finish.'

## Lab 2 – Training Widget (cont.)

### 4. Mark attendance for a Training Session

1. On the Homepage, click the 'View All' link under (at the bottom of the 'Training Sessions' section)
2. Find and select the session for which you would like to mark attendance
3. In the Attendees section, record the hours attended, attendance status (Attended, No Show, Partial Attendance), and notes (if applicable) for each attendee.
4. Click "Log Attendance and Close Training"

## Lab 3 – Dashboard

1. **Navigate to the HR Onboarding Portal (<https://quspsonboarding.servicenowservices.com/onboarding>) and click 'View All Reports' under 'My Overview' to navigate to the HR Onboarding Dashboard**
2. **Click the Active HR Cases tab and familiarize yourself with the displayed reports:**
  1. Active Cases Count (Number)
  2. Cases by HR Service
  3. HR Service Table
  4. HR Onboarding Cases by Activity Set
  5. RCA/ARC Cases by Activity Set
  6. All Active Cases

NOTE: Try changing the filter conditions to see how the reports are updated based on defined criteria
3. **Click the Active To Dos tab and familiarize yourself with the displayed reports:**
  1. Active To-Dos Count (Number)
  2. Active To-Dos

NOTE: Try changing the filter conditions to see how the reports are updated based on defined criteria

## Lab 4 – Reporting

1. **Navigate to the HR Onboarding Portal (<https://quspsonboarding.servicenowservices.com/onboarding>) and click ‘View All Reports’ under ‘My Overview’ to navigate to the backend view of the HR Onboarding Pilot system**
2. **Type ‘Reporting’ in the filter navigator to navigate to HR Dashboard & Reports > Reports**
3. **Click through the different tabs to familiarize yourself with the different reports available for you to view in the HR Onboarding Pilot system**
  1. My Reports: Reports created by the logged in user
  2. Group: Reports shared with the logged in user via group or user
  3. Global: Reports that are shared as global
  4. All: All reports accessible by the logged in user
4. **Create a new report using the ‘Create a Report’ button**
  1. Data: Populate a name for the report, select ‘Table’ for data source, and select ‘HR Lifecycle Event Cases’ OR ‘HR Tasks’ to generate a report for the HR Onboarding Pilot data
  2. Type: Select a type of report you would like to use to display the data (e.g. Pie Chart, Bar Graph, etc.)
  3. Configure: Select how you would like to group the data.
  4. Style: Update the color palette, size, and format
5. **Click ‘Run’ to generate the report. Make changes as needed and click ‘Save’ to save the report.**
6. **Click ‘Share’ to share the report with a specific group or user**

## Lab 5 – Pre-Boarding Tasks

1. **Navigate to the HR Onboarding Portal (<https://quspsonboarding.servicenowservices.com/onboarding>) and click 'My Requests' to view a list of all open HR Onboarding Requests**
2. **Select a request that is not closed or cancelled. Once the request is displayed, click the 'Pre-Boarding' link under the timeline to view all tasks. Select 'Assigned to Me' under the drop-down in the center of the page. The following task(s) will be displayed:**
  1. **Schedule 'XXX' Training**  
**NOTE:** The HR Onboarding system will automatically create a separate 'Scheduling' task for each type of training relevant to that occupation code. Therefore, there may be more than one 'Scheduling' task.
3. **Click 'Schedule 'XXX' Training' task and select the appropriate training session from the drop-down list**
4. **Continue through all 'Schedule 'XXX' Training' tasks**
5. **Select 'Assigned to Me' under the drop-down in the center of the page. No tasks should be displayed**



## Lab 6 – Week 1 Tasks

1. **Navigate to the HR Onboarding Portal (<https://quspsonboarding.servicenowservices.com/onboarding>) and click 'My Requests' to view a list of all open HR Onboarding Requests**
2. **Select a request that is not closed or cancelled. Once the request is displayed, click the 'Week 1' link under the timeline to view all tasks. Select 'Assigned to Me' under the drop-down in the center of the page. The following task(s) will be displayed:**
  1. **Mark Attendance for 'XXX' Training**  
**NOTE:** The HR Onboarding system will automatically create a separate 'Mark Attendance...' task for each type of training relevant to that occupation code. Therefore, there may be more than one 'Mark Attendance...' task.
3. **Click 'Mark Attendance for 'XXX' Training' task and complete the required fields**
  1. Number of Hours Attended
  2. Employee's Completion Status
  3. Notes (if applicable)
  4. Click 'Submit'
4. **Continue through all 'Mark Attendance for 'XXX' Training' tasks**
5. **Select 'Assigned to Me' under the drop-down in the center of the page. No tasks should be displayed**

## Lab 7 – Week 2 Tasks

1. **Navigate to the HR Onboarding Portal (<https://quspsonboarding.servicenowservices.com/onboarding>) and click 'My Requests' to view a list of all open HR Onboarding Requests**
2. **Select a request that is not closed or cancelled. Once the request is displayed, click the 'Week 2' link under the timeline to view all tasks. Select 'Assigned to Me' under the drop-down in the center of the page. The following tasks will be displayed:**
  1. **Mark Attendance for 'XXX' Training**

**NOTE:** The HR Onboarding system will automatically create a separate 'Mark Attendance...' task for each type of training relevant to that occupation code. Therefore, there may be more than one 'Mark Attendance...' task.
3. **Click 'Mark Attendance for 'XXX' Training' task and complete the required fields**
  1. Number of Hours Attended
  2. Employee's Completion Status
  3. Notes (if applicable)
  4. Click 'Submit'
4. **Continue through all 'Mark Attendance for 'XXX' Training' tasks**
5. **Select 'Assigned to Me' under the drop-down in the center of the page. No tasks should be displayed**

## Lab 8 - Closing a ServiceNow HR Onboarding cases

1. **Navigate to the HR Onboarding Portal (<https://quspsonboarding.servicenowservices.com/onboarding>) and click 'My Requests' to view a list of all open HR Onboarding Requests**
2. **Select a request that is not closed or cancelled.**
3. **Click the 'Actions' button on the HR case view. The drop-down is expanded and the following values are displayed:**
  1. Send Email
  2. Close Onboarding Case
  3. Reassign Supervisor
  4. Reassign HR Representative
  5. Reassign Trainer
4. **Click 'Close Onboarding Case'**
  1. Populate the mandatory fields (indicated by red \*)
  2. For Reason of Cancellation, select 'Voluntary Separation - New Hire Initiated' OR 'Involuntary Separation - Employer Initiated'
  3. Read the confirmation statement and check the checkbox
  4. Click 'Close Case'
5. **Click 'Activity' tab near middle of page to confirm an entry was added to indicate Case Closure email was sent to the HR Rep**

## Lab 9 – Communication

1. **Navigate to the HR Onboarding Portal (<https://quspsonboarding.servicenowservices.com/onboarding>) and click 'View All Reports' under 'My Overview' to navigate to the HR Onboarding Dashboard**
2. **Type 'Quick Messages' in the filter navigator**
  1. Select Email Client > Quick Messages
  2. Click 'New'
  3. Populate the mandatory fields, make sure the 'active' field is checked and the table field is populated with 'HR Lifecycle Events Case', and click 'Submit'
3. **Navigate to the HR Onboarding Portal (<https://quspsonboarding.servicenowservices.com/onboarding>) and click 'My Requests' to view a list of all open HR Onboarding Requests**
4. **Select a request that is not closed or cancelled.**
5. **Click the 'Actions' button on the HR case view. The drop-down is expanded and the following values are displayed:**
  1. Send Email
  2. Close Onboarding Case
  3. Reassign Supervisor
  4. Reassign HR Representative
  5. Reassign Trainer
6. **Click 'Send Email'**
  1. Click the Quick Messages drop-down on top right
  2. Populate the 'To' field and click 'Send'
7. **Click 'Activity' tab near middle of page to confirm an entry was added to indicate the email was sent**

## Lab 10 – Reassignment

1. **Navigate to the HR Onboarding Portal (<https://quspsonboarding.servicenowservices.com/onboarding>) and click ‘My Requests’ to view a list of all open HR Onboarding Requests**
2. **Select a request that is not closed or cancelled.**
3. **Click the ‘Actions’ button on the HR case view. The drop-down is expanded and the following values are displayed:**
  1. Send Email
  2. Close Onboarding Case
  3. Reassign Supervisor
  4. Reassign HR Representative
  5. Reassign Training Lead
4. **Click ‘Reassign Training Lead’**
  1. Select a user to reassign as Training Lead on the case
  2. Click ‘Save’

## Lab 11 – Submitting a Support Request

1. **Navigate to the HR Onboarding Portal (<https://quspsonboarding.servicenowservices.com/onboarding>)**
2. **Click ‘My Support Requests’ on the top right**
3. **Select a ‘Submit a Support Request’**
4. **Populate the mandatory fields (indicated by the red \*)**
5. **Click ‘Submit’**

# HR Onboarding Pilot

User Guides

## CONTENTS

Document purpose and overview:

<b>View a New Hire Case.....</b>	<b>1</b>
<b>Reassign a New Hire Case.....</b>	<b>2</b>
<b>View and Complete a To-Do .....</b>	<b>3</b>
<b>Schedule a Training Session in Bulk.....</b>	<b>4</b>
<b>Schedule a Training Session Individually .....</b>	<b>6</b>
<b>Record Training Attendance in Bulk.....</b>	<b>7</b>
<b>Record Training Attendance Individually .....</b>	<b>8</b>
<b>Schedule a Probationary Review .....</b>	<b>10</b>
<b>Close a New Hire Case .....</b>	<b>14</b>
<b>Submit a Support Request.....</b>	<b>16</b>
<b>View Active HR Cases and Active To-Do Reports .....</b>	<b>17</b>
<b>Sending an Email to Another System User Through ServiceNow .....</b>	<b>19</b>
<b>Update a New Hire Case Notes.....</b>	<b>20</b>
<b>Onboarding Activities &amp; Activity Sets .....</b>	<b>21</b>

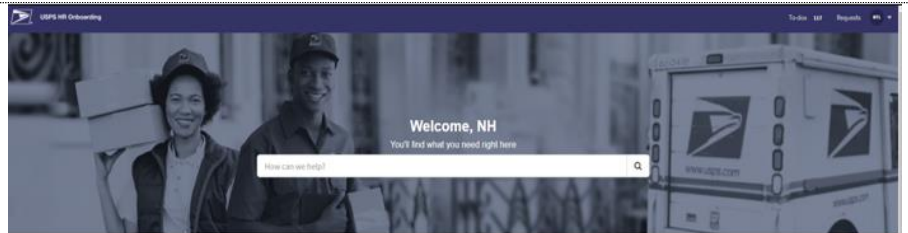






## View a New Hire Case

### Navigation: Home > My Requests

How to view a New Hire Case.

Supervisors, HR and Trainers can use the HR Onboarding Pilot to get visibility into a new hire's onboarding process.


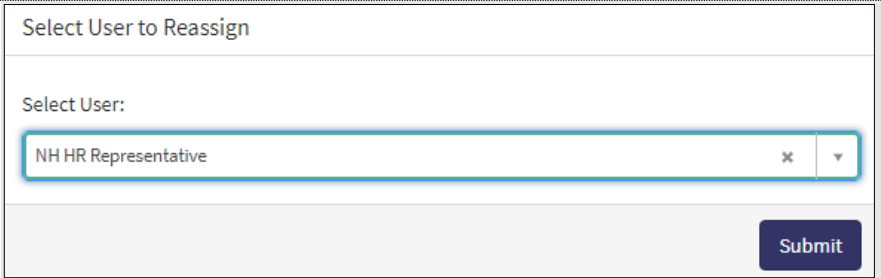

Important Step	Visual Aid																																																
1. Go to <a href="https://uspsonboarding.servicenowservices.com/onboarding">https://uspsonboarding.servicenowservices.com/onboarding</a> to login for Supervisors and HR. <a href="https://uspsonboarding.servicenowservices.com/training">https://uspsonboarding.servicenowservices.com/training</a> to login for Trainers																																																	
2. Login to the HR Onboarding Pilot with your ACE ID. The home screen should load.																																																	
3. On the home screen, click <i>View My Requests</i> located between the <i>My To-Dos</i> and <i>My Team</i> links. The <i>My Requests</i> screen should load.	<div><div><p><b>My To-Dos</b></p><p>View currently assigned tasks and your New Hire's Onboarding progress.</p><p><a href="#">View My To-Dos</a></p></div><div><p><b>My Requests</b></p><p>View current onboarding cases and address any requests assigned to you.</p><p><a href="#">View My Requests</a></p></div><div><p><b>My Team</b></p><p>View the names and contact information for members of your team and the HR personnel supporting them.</p><p><a href="#">View My Team</a></p></div><div><p><b>Helpful Links</b></p><p>View Non-Career Employee onboarding resources that may be helpful to you and your New Hires.</p><p><a href="#">View Helpful Links</a></p></div></div>																																																
4. In the <i>My Requests</i> screen, click on the name of the New Hire Case you want to view. The new hire's record should load.	<div><div>☰ HR Onboarding Cases<div>Keyword Search<input type="text"/></div><table><tr><th>Number</th><th>Subject person</th><th>Position</th><th>Occupation Code</th><th>Designation Activity Code</th><th>Location</th><th>Employment start date</th><th>HR Representative</th></tr><tr><td>HRC0001345</td><td>Toms of Anna</td><td>PSE SALES &amp; SVCS/DISTRIBUTION ASSOCIATE</td><td>2395-0017</td><td>120</td><td>33054-ROYAL PALM-1449534</td><td>2021-04-01</td><td>SC HR Representative</td></tr><tr><td>HRC0001343</td><td>Twyla Cordova</td><td>PSE SALES &amp; SVCS/DISTRIBUTION ASSOCIATE</td><td>2395-0017</td><td>814</td><td>51006-BATTLE CREEK-1354205</td><td>2021-05-31</td><td>NH HR Representative</td></tr><tr><td>HRC0001341</td><td>Arturo Liu</td><td>MAIL HANDLER ASSISTANT</td><td>2315-0085</td><td>814</td><td>29020-CAMDEN-1356735</td><td>2021-07-28</td><td>SC HR Representative</td></tr><tr><td>HRC0001339</td><td>Cherine Cordova</td><td>PSE SALES &amp; SVCS/DISTRIBUTION ASSOCIATE</td><td>2395-0017</td><td>814</td><td>03051-HUDSON-1367564</td><td>2021-07-09</td><td>NH HR Representative</td></tr><tr><td>HRC0001337</td><td>John Pepin</td><td>City Carrier Assistant 1</td><td>2310-0045</td><td>814</td><td>29020-CAMDEN-1356735</td><td>2021-07-24</td><td>SC HR Representative</td></tr></table></div></div>	Number	Subject person	Position	Occupation Code	Designation Activity Code	Location	Employment start date	HR Representative	HRC0001345	Toms of Anna	PSE SALES & SVCS/DISTRIBUTION ASSOCIATE	2395-0017	120	33054-ROYAL PALM-1449534	2021-04-01	SC HR Representative	HRC0001343	Twyla Cordova	PSE SALES & SVCS/DISTRIBUTION ASSOCIATE	2395-0017	814	51006-BATTLE CREEK-1354205	2021-05-31	NH HR Representative	HRC0001341	Arturo Liu	MAIL HANDLER ASSISTANT	2315-0085	814	29020-CAMDEN-1356735	2021-07-28	SC HR Representative	HRC0001339	Cherine Cordova	PSE SALES & SVCS/DISTRIBUTION ASSOCIATE	2395-0017	814	03051-HUDSON-1367564	2021-07-09	NH HR Representative	HRC0001337	John Pepin	City Carrier Assistant 1	2310-0045	814	29020-CAMDEN-1356735	2021-07-24	SC HR Representative
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## Reassign a New Hire Case

**Navigation:** Home > New Hire Case

How to re-assign a New Hire Case.

Supervisors, HR and Trainers can reassign a new hire's record to another person in their same role.

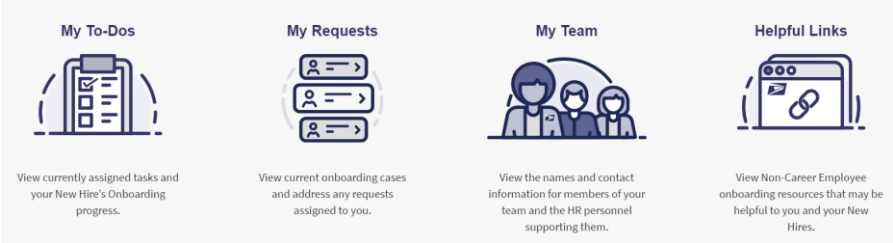
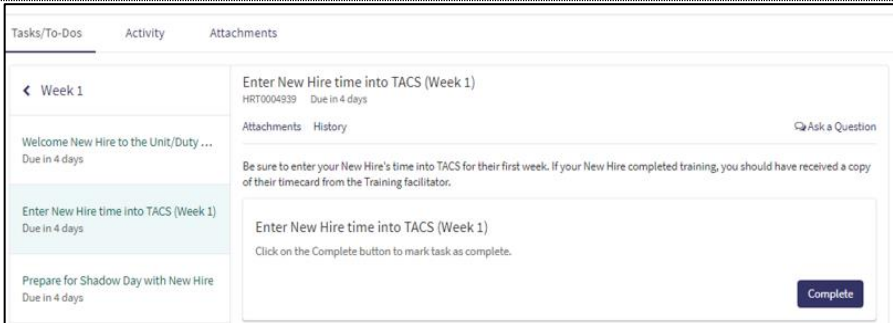
Important Step	Visual Aid
1. (When logged in and with the New Hire Case open). Select the <i>Actions</i> dropdown menu located on the right side of the New Hire Case title, which states "Onboarding: [new hire's name]".	
2. Click "Reassign [Role]" where [Role] matches your role in the system. So that if you're a supervisor it will say "Reassign Supervisor".	
3. In the "Select User to Reassign" pop-up, select the name of the person to which you want to reassign the New Hire Case and click "Save".	
4. Note that the name under your role on the new hire case has been updated to the person you selected.	
<b>Other notes on reassignment:</b> Any user in the system can access the 'Actions' button on any case. From there, they can access the reassign buttons (separate button to reassign HR, training, or supervisor). <ul style="list-style-type: none"> <li>A user who is assigned to the case can transfer it to someone else.</li> <li>A user who is not assigned to the case can transfer it to themselves ("claim" it), OR</li> <li>A user who is not assigned to the case can transfer it from person A to person B ("manage" or "administer" it).</li> </ul>	

## View and Complete a To-Do

### Navigation: Home > My To-Dos

How to view and complete a To-Do.

Supervisors, HR and Trainers can use the HR Onboarding Pilot to complete To-Dos related to a new hire's onboarding process.


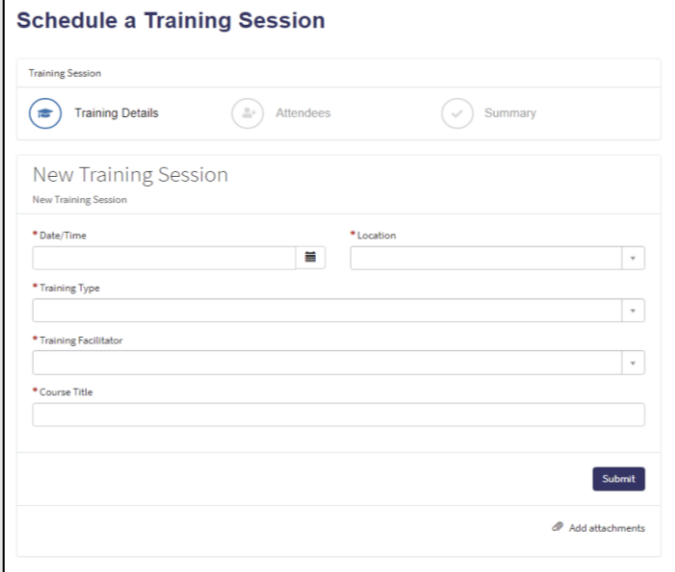
Important Step	Visual Aid
1. Go to <a href="https://uspsonboarding.servicenowservices.com/onboarding">https://uspsonboarding.servicenowservices.com/onboarding</a> to login.	
2. Login to the HR Onboarding Pilot with your ACE ID. The home screen should load.	
3. On the home screen, click View My To-Dos located next to the My Requests link. The My To-Dos screen should load.  You can also get to a To-Do through any New Hire Case to which you are assigned.	 <p>My To-Dos: View currently assigned tasks and your New Hire's Onboarding progress.</p> <p>My Requests: View current onboarding cases and address any requests assigned to you.</p> <p>My Team: View the names and contact information for members of your team and the HR personnel supporting them.</p> <p>Helpful Links: View Non-Career Employee onboarding resources that may be helpful to you and your New Hires.</p>
4. Click any To-Do in the list. Review the To-Do and then, when ready, click "Mark as Complete" (or similar action).  Some To-Dos have additional fields and instructions to follow.	

## Schedule a Training Session in Bulk

**Navigation:** Home > Training Sessions > Schedule a Training Session

How to schedule a training session for multiple new hires.

Trainers can create and schedule new hires to training sessions through the HR Onboarding Pilot. Limited to notifying the new hire via email with the training session details.

Important Step	Visual Aid
<p>1. (When logged in) From the Home screen click on “Schedule a New Training” button under <i>Training Sessions</i>. The <i>Schedule a Training</i> screen loads on the <i>Training Details</i> step.</p>	 <p>The screenshot shows a list of training sessions under the heading "Training Sessions". The list includes:</p> <ul style="list-style-type: none"> <li>ARC Academy 123 23d ago • 03033-BROOKLINE-1356020</li> <li>TGest about a month ago • 03033-BROOKLINE-1356020</li> <li>City Carrier Academy 7d ago • 03034-CANDIA-1356848</li> <li>Test Welcome to USPS [Jim Fitzsimmons] 8d ago • 03031-AMHERST-1352973</li> <li>Sales and Services Associate Training (07/24/2021) 13d ago • 03031-AMHERST-1352973</li> </ul> <p>At the bottom, it says "First 5 of 32" and a "View all" link.</p>
<p>2. Enter the Training Details and click “Submit”. The <i>Attendees</i> step loads next.</p>	 <p>The screenshot shows the "Schedule a Training Session" form. It has three tabs: "Training Details" (active), "Attendees", and "Summary". The "New Training Session" section includes the following fields:</p> <ul style="list-style-type: none"> <li>* Date/Time: [Text input with calendar icon]</li> <li>* Location: [Dropdown menu]</li> <li>* Training Type: [Dropdown menu]</li> <li>* Training Facilitator: [Text input]</li> <li>* Course Title: [Text input]</li> </ul> <p>At the bottom right is a "Submit" button. At the bottom center is a link "Add attachments".</p>

3. Click the *Add Attendees* button. A list of pre-filtered attendees will load.

4. Select each attendee you want to add and click *Add Selected*. Then click the “Next: Review Summary & Confirm” button. The *Summary* step will load.

Attendees

Search

Search bar can be used to look for new hires by name, position, occupation code, designation/activity code, location, effective date, or HR Rep.

Add Selected

	Name	Position	Occupation Code	Designation/ Activity Code	Location	Effective Date	HR Rep
<input type="checkbox"/>	Tomsof Anna	PSE SALES & SVCS/DISTRIBUTION ASSOCIATE	2395-0017	120	33054-ROYAL PALM-1449534	2021-04-01	SC HR Representative
<input type="checkbox"/>	Tomsof Anna		2325-07XX	120	30320-PEACHTREE-1352485	2021-04-11	NH HR Representative
<input type="checkbox"/>	Barbara Na	City Carrier Assistant 1	2310-0045	814	29020-CAMDEN-1356735	2021-04-25	SC HR Representative
<input type="checkbox"/>	Sahadat Campbell	City Carrier Assistant 1	2310-0045	814	29009-BETHUNE-1354843	2021-04-25	SC HR Representative
<input type="checkbox"/>	Prinda Edwards I	City Carrier Assistant 1	2310-0045	813	29020-CAMDEN-1356735	2021-04-25	SC HR Representative
<input type="checkbox"/>	PAMSmhaeleven TwentyFour	MAIL HANDLER ASSISTANT	2315-0085	813	29009-BETHUNE-1354843	2021-04-25	SC HR Representative

Add Selected

### Schedule a Training Session

Training Session

Training Details Attendees Summary

Attendees

Add Attendees +

Barbara Na 29020-CAMDEN-1356735 City Carrier Assistant 1

Note

You will review and finalize this training session in the next step

Next: Review Summary & Confirm

Next: Review Summary & Confirm

5. Review the summary details and click “Save” when done.

City Carrier Academy

Training

Course Title City Carrier Academy Location 03034-CANDIA-1356848

Training Type City Carrier Academy Date/Time 2021-08-03 09:00:09

Facilitator Brock Sizer Training Hours

Related Lists Attendees


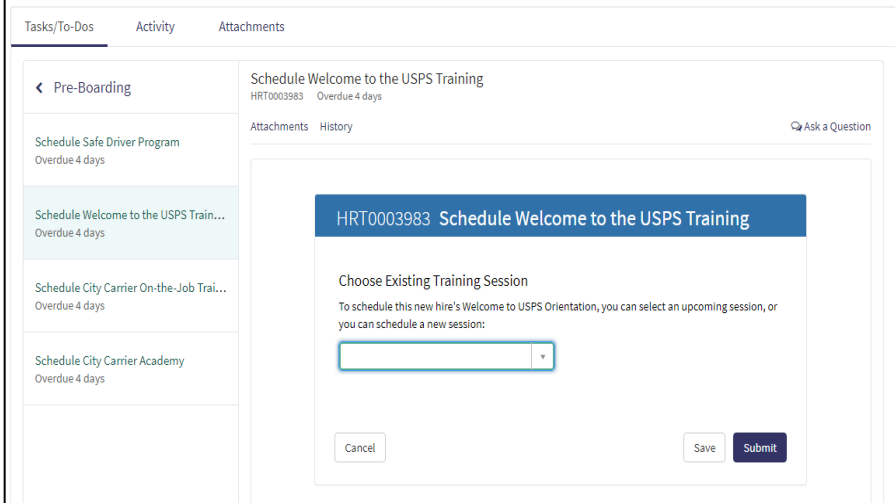
Save (Ctrl + S)

## Schedule a Training Session Individually

**Navigation:** Home > New Hire Case > Training To-Do

How to schedule a training session for a single new hire.

Trainers can create and schedule new hires to training sessions through the HR Onboarding Pilot. Limited to notifying the new hire via email with the training session details.

Important Step	Visual Aid
<p>1. (When logged in and with the New Hire Case open). Navigate to the specific training To-Do you want to schedule (Ex: "Schedule New Hire for Welcome to USPS Training"). The To-Do will open.</p> <p><b>Note:</b> You will first need to click on the activity set that the training session belongs to. The "Welcome to USPS Training" training session belongs to the <i>Pre-Boarding</i> activity set.</p>	 <p>The screenshot shows a list of training sessions under the heading "Training Sessions". The list includes:</p> <ul style="list-style-type: none"> <li>ARC Academy 123 23d ago • 03033-BROOKLINE-1356020</li> <li>TGest about a month ago • 03033-BROOKLINE-1356020</li> <li>City Carrier Academy 7d ago • 03034-CANDIA-1356848</li> <li>Test Welcome to USPS [Jim Fitzsimmons] 8d ago • 03031-AMHERST-1352973</li> <li>Sales and Services Associate Training (07/24/2021) 13d ago • 03031-AMHERST-1352973</li> </ul> <p>At the bottom, it says "First 5 of 32" and a "View all" link.</p>
<p>2. Click on the dropdown to "Choose Existing [training title] Session" Where [training title] is the name of the training session.</p> <p>3. Click the Submit button. The new hire should be assigned to the training session.</p>	 <p>The screenshot shows the "Schedule Welcome to the USPS Training" form. The form has tabs for "Tasks/To-Dos", "Activity", and "Attachments". The "Activity" tab is selected, showing a list of activities under "Pre-Boarding". The "Schedule Welcome to the USPS Training" activity is highlighted. The form also shows a "Choose Existing Training Session" dropdown menu and "Cancel", "Save", and "Submit" buttons.</p>

## Record Training Attendance in Bulk

**Navigation:** Home > Training Sessions > [Training Session]

How to bulk record training attendance.

Trainers can record attendance to training sessions through the HR Onboarding Pilot.

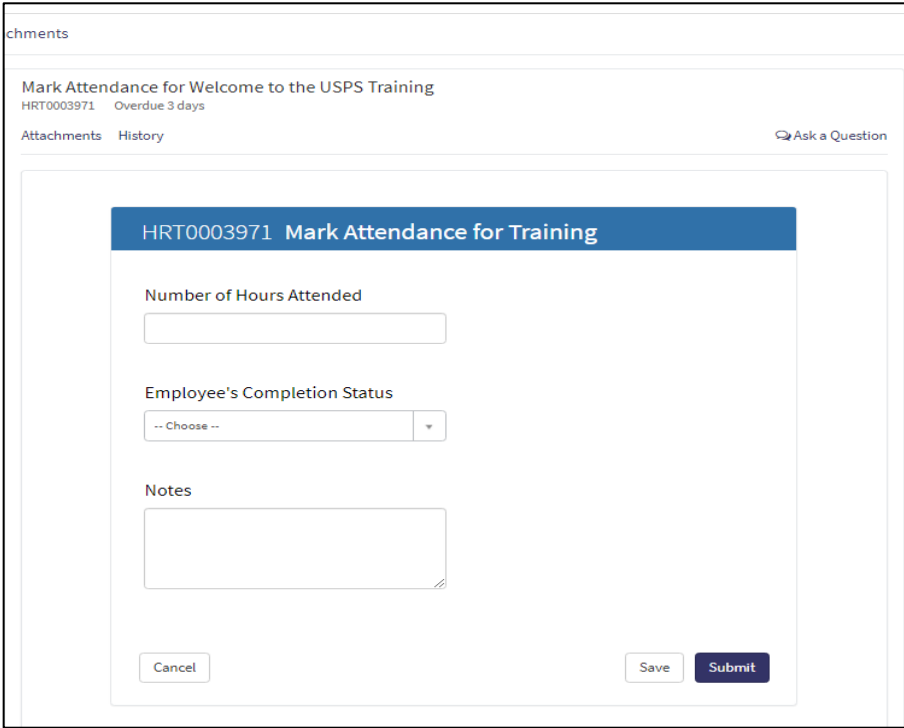
<div>Important Step</div> <div>1. (When logged in) From the Home Screen click on a Training Session or click on “View All” to view all training sessions. The training session details will open.</div>	<div>Visual Aid</div> <div><div>Training Sessions</div><div>ARC Academy 123</div><div>23d ago • 03033-BROOKLINE-1356020</div><div>TGest</div><div>about a month ago • 03033-BROOKLINE-1356020</div><div>City Carrier Academy</div><div>7d ago • 03034-CANDIA-1356848</div><div>Test Welcome to USPS [Jim Fitzsimmons]</div><div>8d ago • 03031-AMHERST-1352973</div><div>Sales and Services Associate Training (07/24/2021)</div><div>13d ago • 03031-AMHERST-1352973</div><div>First 5 of 32</div><div>View all</div></div>																																				
<div>2. Enter the attendance for each new hire: number of hours attended, status and notes.</div>	<div><div>Attendees</div><table><tr><td>Nick Perez</td><td>04101-ME-NH-VT-1434697</td><td>Effective 2021-05-30</td><td>hrs</td><td></td><td>Notes</td></tr><tr><td>Lisa Samuel City Carrier Assistant 1</td><td>03033-BROOKLINE-1356020</td><td>Effective 2021-05-22</td><td>hrs</td><td></td><td>Notes</td></tr><tr><td>Tyra Banks RURAL CARR ASSOC/SRV REG RTE</td><td>03042-EPPING-1362675</td><td>Effective 2021-06-05</td><td>hrs</td><td></td><td>Notes</td></tr><tr><td>Twyla Cordova PSE SALES &amp; SVCS/DISTRIBUTION ASSOCIATE</td><td>51006-BATTLE CREEK-1354205</td><td>Effective 2021-05-31</td><td>hrs</td><td></td><td>Notes</td></tr><tr><td>Hsiailin Allen ASSISTANT RURAL CARRIER (ARC)</td><td>29045-ELGIN-1362260</td><td>Effective 2021-04-28</td><td>hrs</td><td></td><td>Notes</td></tr><tr><td>Jia Saloni City Carrier Assistant 2</td><td>03049-HOLLIS-1367208</td><td>Effective 2021-05-07</td><td>hrs</td><td></td><td>Notes</td></tr></table><div><div>Edit Attendees</div><div>Log Attendance and Close Training</div></div></div>	Nick Perez	04101-ME-NH-VT-1434697	Effective 2021-05-30	hrs		Notes	Lisa Samuel City Carrier Assistant 1	03033-BROOKLINE-1356020	Effective 2021-05-22	hrs		Notes	Tyra Banks RURAL CARR ASSOC/SRV REG RTE	03042-EPPING-1362675	Effective 2021-06-05	hrs		Notes	Twyla Cordova PSE SALES & SVCS/DISTRIBUTION ASSOCIATE	51006-BATTLE CREEK-1354205	Effective 2021-05-31	hrs		Notes	Hsiailin Allen ASSISTANT RURAL CARRIER (ARC)	29045-ELGIN-1362260	Effective 2021-04-28	hrs		Notes	Jia Saloni City Carrier Assistant 2	03049-HOLLIS-1367208	Effective 2021-05-07	hrs		Notes
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<div>3. Click “Log Attendance and Close Training” button. Each New Hire Case will be updated with the attendance details set.</div>																																					

## Record Training Attendance Individually

**Navigation:** Home > New Hire Case > [Training Session To-Do]

How to individually record training attendance.

Trainers can record attendance to training sessions through the HR Onboarding Pilot.

Important Step	Visual Aid
<p>1. (When logged in and with the New Hire Case open). Click on the “Submit Hours &amp; Attendance for [training session]” To-Do where [training session] is the name of the training session. The To-Do will open.</p> <p><b>Note:</b> You will first need to click on the activity set that the training session belongs to. The “Mark Attendance for Training” to-do belongs to the <i>Week 1</i> activity set.</p>	
<p>2. Enter the number of hours attended, status and notes. Then click “Submit”. The training attendance will be applied to the New Hire Case.</p> <p><b>Note:</b> The Trainer can select a completion status of “<b>Partial Attendance</b>” and indicate in the notes the reason (“Has a family emergency”, etc.). <b><u>DO NOT ENTER ANY MEDICAL INFORMATION.</u></b> Trainers can also select “<b>No Show</b>” status to indicate that the new hire did not show up to the training session.</p> <p>Separate action can then be taken to either close the new hire case due to separation or reschedule a new training session.</p>	



## Prepare for Shadow Day, First Day on Job

**Navigation:** Home > To-Do > Prepare for Shadow Day

How to prepare for the new hire's shadow day, where applicable.

You can prepare for the new hire's shadow day through the HR Onboarding Pilot.

## Important Step

1. (When logged in and with the New Hire Case open). Navigate to a “Prepare for Shadow Day with New Hire” To-Do on a New Hire Case.

**Note:** You will first need to click on the activity set that the to-do belongs to. The “Prepare for Shadow Day with New Hire” to-do belongs to the *Week 1* activity set.

**Note:** Shadow Day tasks are optional. If not applicable to specific New Hire, they do not need to be completed within the Pilot system

2. View on screen or download the Shadow Day Checklist.

## Visual Aid

HR Onboarding: Jia Saloni

Actions

25

New Hire

Jia Saloni

Effective Date

2021-05-07

MS

Supervisor

NH Supervisor

Employment Type

Non-Career Employee

MSR

HR Rep

NH HR Representative

Position

City Carrier Assistant 2

NTL

Training Rep

NH Training Lead

Location

03049-HOLLIS-1367208

Tasks/To-Dos

Activity

Attachments

< Week 1

Welcome New Hire to the Unit/Duty ...

Enter New Hire time into TACS (Week 1)

Prepare for Shadow Day with New Hire

Prepare for New Hire's First Day in th...

Schedule Initial Meeting with Superv...

Due in 4 days

Due in 4 days

Due in 4 days

Due in 4 days

Due in 4 days

Due in 4 days

Prepare for Shadow Day with New Hire

HRT0004938

Due in 4 days

Attachments

History

Ask a Question

Download

Print

Share

1

of 2

Search

Search

New Hire Intro to Unit Checklist

SECTION 1 – General Information (Complete for each new hire)

Employee Name: \_\_\_\_\_

EIN: \_\_\_\_\_

Unit Name & Finance: \_\_\_\_\_

Effective Date: \_\_\_\_\_

Shadow Day Date: \_\_\_\_\_

First Day in Unit Date: \_\_\_\_\_

SECTION 2 – Management Process Checklist (Initial and date each step when complete)

PART A – The Shadow Day

Preparation for Shadow Day – Postmaster / Manager

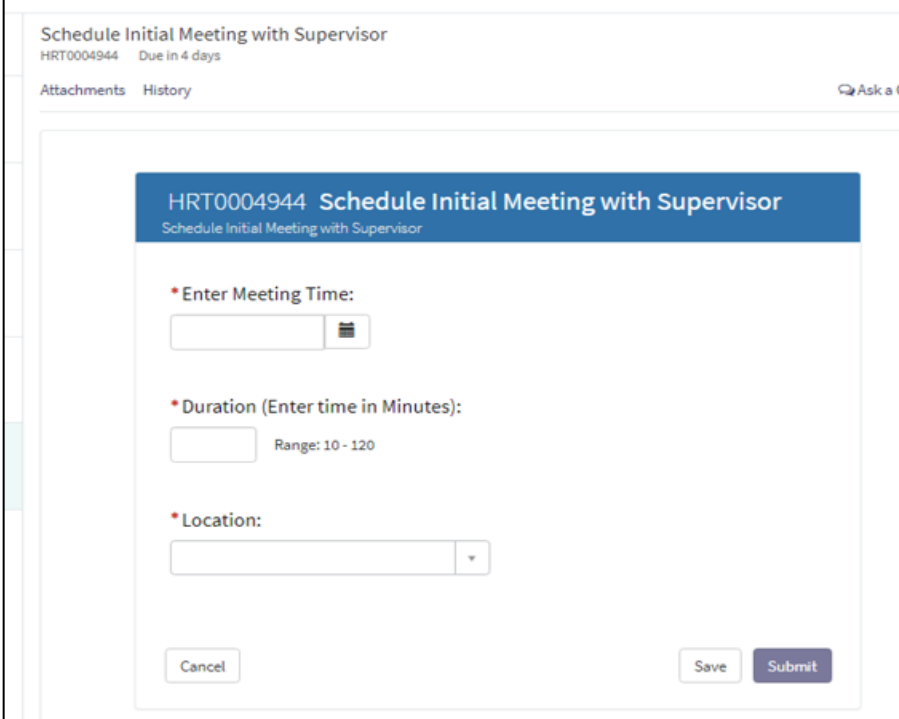
	Initial	Date
A1 Coordinate date, time, and reporting instructions with district training		
A2 Schedule Shadow Day with OUI or qualified POC		
A3 Schedule back up POC, in case primary POC becomes unavailable		
A4 Block out time on your calendar for an initial meeting with new hire		
A5 Schedule installation of jump seat for shadow day (if necessary)		
A6 Print route map for route to be shadowed (if applicable)		

## Schedule a Probationary Review

### Navigation: Home > New Hire Case

How to schedule a probationary review.

Supervisors can schedule their probationary reviews through the HR Onboarding Pilot.

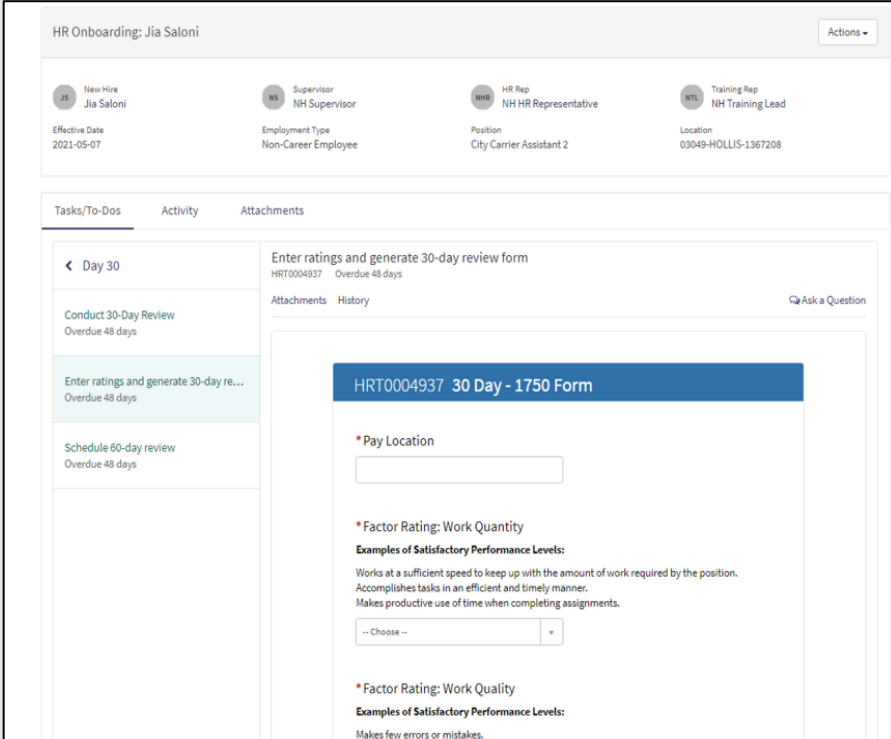
Important Step	Visual Aid
<p>(When logged in and with the New Hire Case open). Navigate to a “Schedule [initial, 30, 60 or 80-Day] Meeting with Supervisor” To-Do.</p> <p><b>Note:</b> You will first need to click on the activity set that the to-do belongs to. The “Schedule Initial Meeting with Supervisor” to-do belongs to the <i>Week 1</i> activity set.</p> <p>RCAs/ARCs will be excluded from the scheduling and completion of an automated PS Form 1750 evaluations at the 30, 60, and 80-Day reviews. They will continue to be evaluated using the same process used today and their reviews will not be captured within the HR Onboarding Pilot tool.</p>	
<ol style="list-style-type: none"> <li>1. Fill out the details of the review and click Submit</li> </ol> <p>Select a Date Select a Time Set duration (minutes) Select Location</p>	

## Prepare and Conduct Probationary Review

**Navigation:** Home > New Hire Case

How to prepare for and certify that you conducted a probationary review for a new hire.

You can complete the probationary form and then certify that the probationary review was conducted all through the HR Onboarding Pilot.

Important Step	Visual Aid
<p>1. (When logged in and with the New Hire Case open). Navigate to a “Enter ratings and generate 30-day review form” To-Do on a New Hire Case.</p> <p><b>Note:</b> these same steps apply for initial, 30-day, 60-day and 80-day reviews. This guide will use 30-day as an example.</p> <p>RCAs/ARCs will be excluded from the scheduling and completion of an automated PS Form 1750 evaluations at the 30, 60, and 80-Day reviews. They will continue to be evaluated using the same process used today and their reviews will not be captured within the HR Onboarding Pilot tool.</p>	 <p>The screenshot displays the HR Onboarding Pilot interface for a new hire case. At the top, it shows the case name 'HR Onboarding: Jia Saloni' and an 'Actions' dropdown. Below this, there are four role cards: 'New Hire Jia Saloni' (Effective Date: 2021-05-07), 'Supervisor NH Supervisor' (Employment Type: Non-Career Employee), 'HR Rep NH HR Representative' (Position: City Carrier Assistant 2), and 'Training Rep NH Training Lead' (Location: 03049-HOLLIS-1367208). The main section is titled 'Tasks/To-Dos' and lists three tasks: 'Conduct 30-Day Review' (Overdue 48 days), 'Enter ratings and generate 30-day re...' (Overdue 48 days), and 'Schedule 60-day review' (Overdue 48 days). The 'Enter ratings and generate 30-day re...' task is selected, showing a detailed view of the 'HRT0004937 30 Day - 1750 Form'. This form includes sections for 'Pay Location' and 'Factor Rating: Work Quantity' and 'Factor Rating: Work Quality', each with a dropdown menu for selection. Examples of satisfactory performance levels are provided for each factor rating section.</p>
<p>2. Complete the 30 Day – 1750 form</p>	

3. Verify that generated report matches the values you entered. You can print this form to aid in conducting the review.

UNITED STATES POSTAL SERVICE®		<b>Employee Evaluation and/or Probationary Report</b> <small>(See Instructions on Reverse)</small>																	
1. Employee's Name (First, MI, Last) <b>Jia Saloni</b>			2. Employee Social Security Number <b>061359902</b>																
3. Title <b>City Carrier Assistant 2</b>		4. Pay Location <b>123</b>	5. Appointment Date <b>2021-05-07</b>	6. Date Probationary Period Ends <b>2021-08-05</b>															
7a. Complete 30-Day Report By: <b>2021-06-05</b>	8a. Complete 60-Day Report By: <b>2021-07-05</b>	9a. Complete 90-Day Report By: <b>2021-07-25</b>		10a. Complete Year End Report By: <b>2022-05-06</b>															
7b. Enter Factor Rating (O, S, U, NO) A <u>O</u> B <u>O</u> C <u>S</u> D <u>O</u> E <u>S</u> F <u>S</u>	8b. Enter Factor Rating (O, S, U, NO) A <u>O</u> B <u>O</u> C <u>S</u> D <u>O</u> E <u>S</u> F <u>S</u>	9b. Enter Factor Rating (O, S, U, NO) A <u>O</u> B <u>O</u> C <u>S</u> D <u>O</u> E <u>S</u> F <u>S</u>		10b. Enter Factor Rating (O, S, U, NO) A <u>O</u> B <u>O</u> C <u>S</u> D <u>O</u> E <u>S</u> F <u>S</u>															
7c. Employee's Initials		8c. Employee's Initials		9c. Employee's Initials															
11. Supervisor's Signature and Date (End of Probationary Period or Year End)		12. Employee's Signature and Date (Does Not Indicate Agreement)																	
<p>Listed below are the factors on which you are to evaluate the employee. Next to each factor are examples of behaviors that would describe performance at the SATISFACTORY level. These are provided as reference points for evaluating performance. Performance substantially above the performance described at the SATISFACTORY level would be rated OUTSTANDING, while performance substantially below the SATISFACTORY level would be rated UNACCEPTABLE. Please indicate your rating of OUTSTANDING, SATISFACTORY, or UNACCEPTABLE for each factor by entering the appropriate letters (O, S, or U) in the boxes in items 7b through 10b. If you have not observed how this person performed on a given factor, or if the factor is not relevant to the position which you are rating, enter "NO" (NOT OBSERVED).</p> <p style="text-align: center;"><b>O = OUTSTANDING    S = SATISFACTORY    U = UNACCEPTABLE    NO = NOT OBSERVED</b></p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 30%;">Factor</th> <th>Examples of Satisfactory Performance Levels</th> </tr> </thead> <tbody> <tr> <td><b>A. Work Quantity</b></td> <td> <ul style="list-style-type: none"> <li>Works at a sufficient speed to keep up with the amount of work required by the position.</li> <li>Accomplishes tasks in an efficient and timely manner.</li> <li>Makes productive use of time when completing assignments.</li> </ul> </td> </tr> <tr> <td><b>B. 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Have Expectations Been Jointly Discussed? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No    Initials: _____ (Supervisor) _____ (Employee)																			
Would You Recommend This Person for Retention or Rehire? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No    Initials: _____ (Supervisor)																			
Please Explain or Provide Additional Comments Below:																			
<div style="display: flex; justify-content: space-between;"> <span>PS Form 1750, August 1994</span> <span><b>1 - Forward to Designated Postal Official</b></span> </div>																			

- During or after conducting the probationary review, navigate to the “Conduct 30-Day Review” to-do (or similar to-do depending on the particular review you’re conducting).

**Note:** You will first need to click on the activity set that the to-do belongs to. The “Conduct 30-Day Review” to-do belongs to the *Day 30* activity set.

- Fill out the Conduct 30-Day Review form and click “Submit”

**Note:** Your next step should be scheduling the next review.

The screenshot displays the HR Onboarding Pilot interface for Jia Saloni. At the top, there's a header 'HR Onboarding: Jia Saloni' with an 'Actions' dropdown. Below this, a summary card shows key details: New Hire (Jia Saloni), Supervisor (NH Supervisor), HR Rep (NH HR Representative), and Training Rep (NH Training Lead). It also lists Effective Date (2021-05-07), Employment Type (Non-Career Employee), Position (City Carrier Assistant 2), and Location (03049-HOLLIS-1367208).

The main section is divided into three tabs: 'Tasks/To-Dos', 'Activity', and 'Attachments'. The 'Tasks/To-Dos' tab is active, showing a list of tasks under the 'Day 30' activity set. The first task is 'Conduct 30-Day Review' (Overdue 48 days). Other tasks include 'Enter ratings and generate 30-day re...' (Overdue 48 days) and 'Schedule 60-day review' (Overdue 48 days).

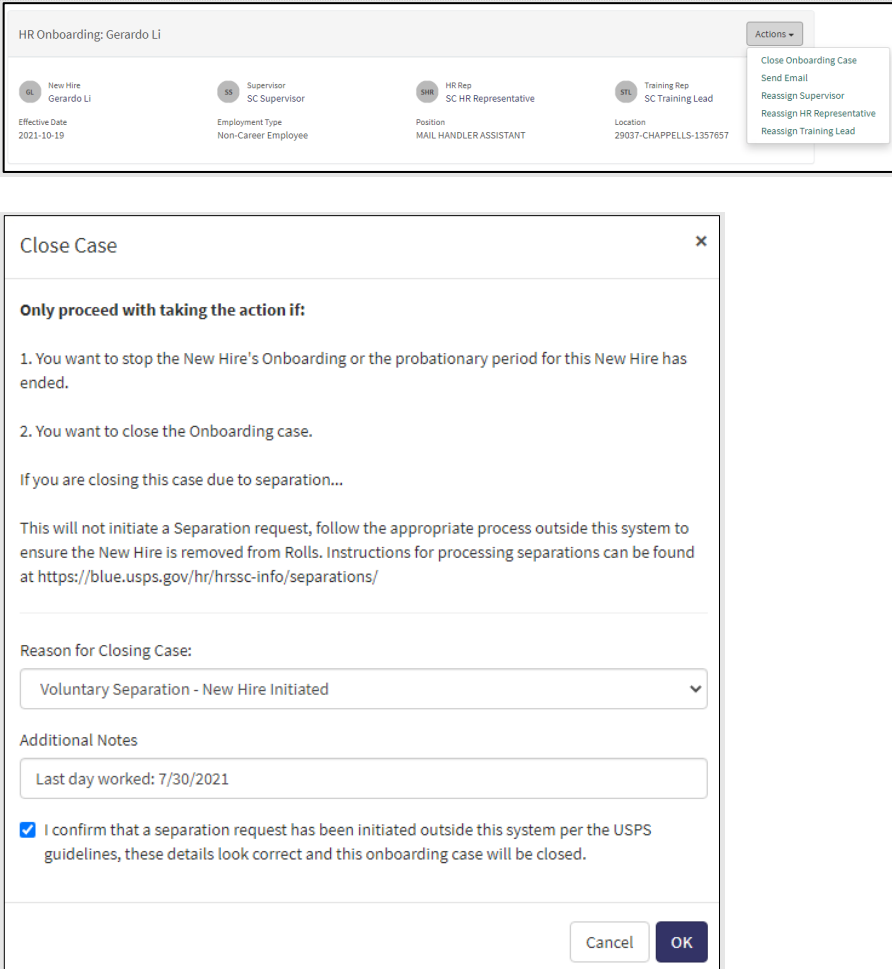
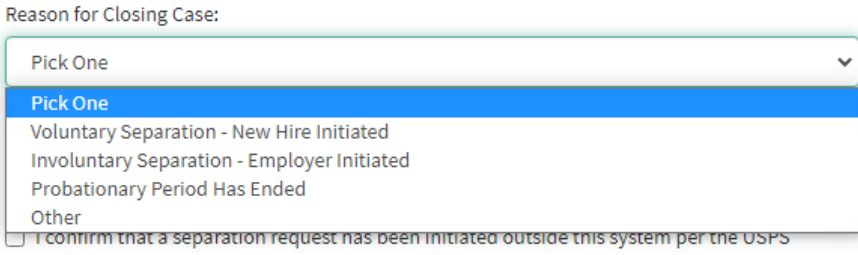
The 'Conduct 30-Day Review' task is expanded, showing a form titled 'HRT0004951 Conduct 30-Day Review'. The form instructions state: 'Conduct the 30-day review with your New Hire. Review the PS form 1750 (probationary form) and discuss the rating that have been provided against all factors on job performance to-date. Obtain acknowledgement from the New Hire or indicate a refusal to sign'. Below the instructions is a dropdown menu labeled '-- Choose --'. The form also includes a question: 'Did this New Hire sign the 30-Day review?' with two radio button options: 'Yes, this New Hire has signed the 30-Day review.' and 'No, this New Hire refused to sign the 30-Day review.' At the bottom of the form are 'Cancel', 'Save', and 'Submit' buttons.

## Close a New Hire Case

**Navigation:** Home > New Hire Case > Action Menu > Close Case

How to close a new hire case.

The HR Onboarding Pilot allows Supervisors and other users to close new hire cases.

Important Step	Visual Aid
<p>1. (When logged in and with the New Hire Case open). Select the <i>Actions</i> dropdown menu located on the right side of the New Hire Case title, which states “Close Onboarding Case”. The Close Case dialog will open.</p>	 <p>HR Onboarding: Gerardo Li</p> <p>Effective Date: 2021-10-19</p> <p>Supervisor: SC Supervisor</p> <p>Employment Type: Non-Career Employee</p> <p>HR Rep: SC HR Representative</p> <p>Position: MAIL HANDLER ASSISTANT</p> <p>Training Rep: SC Training Lead</p> <p>Location: 29037-CHAPPELLS-1357657</p> <p>Actions</p> <ul style="list-style-type: none"> <li>Close Onboarding Case</li> <li>Send Email</li> <li>Reassign Supervisor</li> <li>Reassign HR Representative</li> <li>Reassign Training Lead</li> </ul> <p><b>Close Case</b></p> <p><b>Only proceed with taking the action if:</b></p> <ol style="list-style-type: none"> <li>You want to stop the New Hire's Onboarding or the probationary period for this New Hire has ended.</li> <li>You want to close the Onboarding case.</li> </ol> <p>If you are closing this case due to separation...</p> <p>This will not initiate a Separation request, follow the appropriate process outside this system to ensure the New Hire is removed from Rolls. Instructions for processing separations can be found at <a href="https://blue.usps.gov/hr/hrssc-info/separations/">https://blue.usps.gov/hr/hrssc-info/separations/</a></p> <p>Reason for Closing Case:</p> <p>Voluntary Separation - New Hire Initiated</p> <p>Additional Notes</p> <p>Last day worked: 7/30/2021</p> <p><input checked="" type="checkbox"/> I confirm that a separation request has been initiated outside this system per the USPS guidelines, these details look correct and this onboarding case will be closed.</p> <p>Cancel OK</p>
<p>2. In the “Reason for Closing Case” dropdown select a reason then provide additional high-level notes if “Other” is selected (example “Duplicate record”).</p>	 <p>Reason for Closing Case:</p> <p>Pick One</p> <p>Pick One</p> <p>Voluntary Separation - New Hire Initiated</p> <p>Involuntary Separation - Employer Initiated</p> <p>Probationary Period Has Ended</p> <p>Other</p> <p><input type="checkbox"/> I confirm that a separation request has been initiated outside this system per the USPS guidelines, these details look correct and this onboarding case will be closed.</p>

3. Check the “confirm closure” checkbox and click “Close Case”. The case will close.

☒ I confirm that a separation request has been initiated outside this system per the USPS guidelines, these details look correct and this onboarding case will be closed.

Cancel


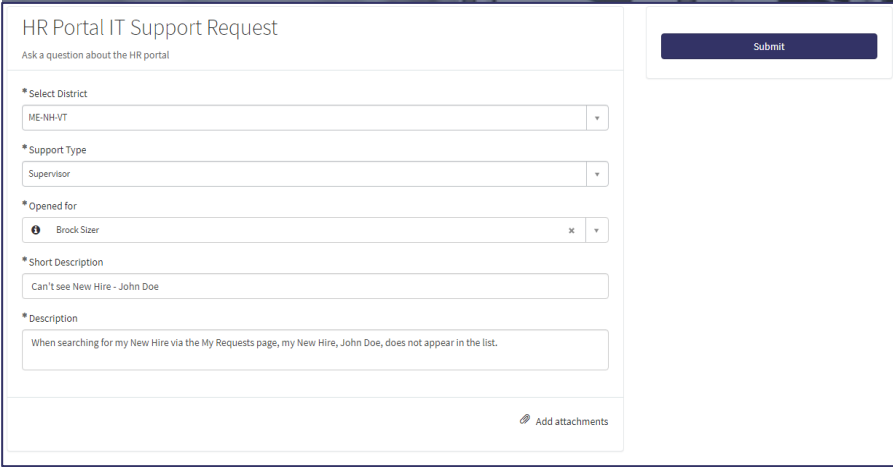
OK

## Submit a Support Request

### Navigation: Home > Submit Requests

How to submit a support request.

You can submit a support request to get help or report an issue through the HR Onboarding Pilot.

Important Step	Visual Aid
<p>2. (When logged in). Select “Support Requests” navigation dropdown then select “Submit a Support Request”</p>	
<p>3. Fill out the HR Portal IT Support Request form with the following details:</p> <ul style="list-style-type: none"> <li>• Your district</li> <li>• Your role (or the role needing support)</li> <li>• The user this request is being opened for (yourself or another user)</li> <li>• A short one sentence description</li> <li>• A longer description of the issue/question with more detail.</li> </ul> <p><b>Note:</b> You can review the status of an existing request by selecting “Support Requests” navigation dropdown then selecting “My Support Requests”</p>	

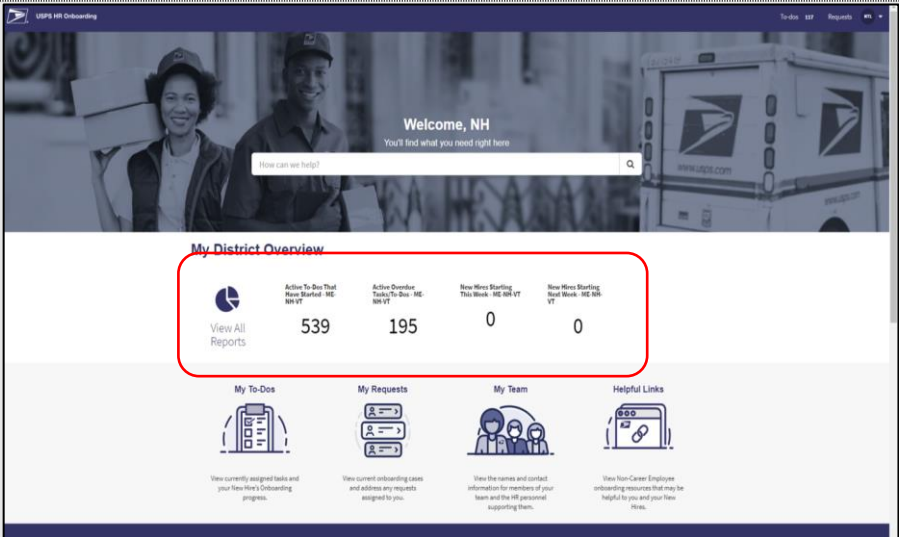
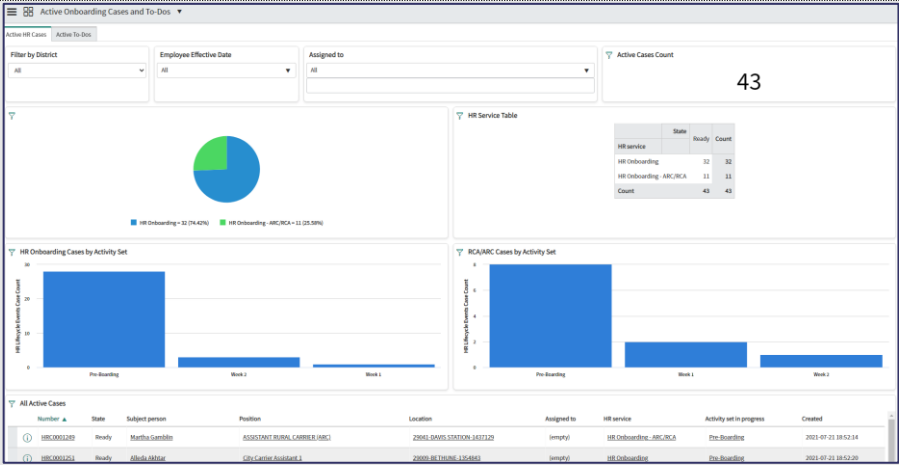


## View Active HR Cases and Active To-Do Reports

### Navigation: ServiceNow > Dashboard and Reporting

How to view reports through ServiceNow interface.

You can view Active HR Cases and Active To-Do Reports for the HR Onboarding Pilot.

Important Step	Visual Aid
<p>1. (When logged in and on the home screen). Click the “View All Reports” icon to view reports</p> <p><b>Note:</b> HR Onboarding Pilot fulfiller users (Supervisors, Trainers, HR Representatives) can create their own reports and share the report with specific users and/or groups.</p>	
<p>2. View the Active HR Cases report</p> <p><b>Metrics</b></p> <ul style="list-style-type: none"> <li>Active Cases Count (Number)</li> <li>Cases by HR Service</li> <li>HR Service Table</li> <li>Onboarding Cases by Activity Set</li> </ul> <p><b>Set</b></p> <ul style="list-style-type: none"> <li>RCA/ARC Cases by Activity Set</li> <li>All Active Cases</li> </ul> <p><b>Filters</b></p> <ul style="list-style-type: none"> <li>District</li> <li>Employee Effective Date</li> <li>Assigned To</li> <li>Due Date</li> </ul>	

3. View the Active To-Dos report

Metrics/Reports

- Active To-Dos That Have Started
- All Active To-Dos

Filters

- District
- Employee Effective Date
- Assigned To
- Due Date

Active HR Cases

Active To-Dos

Filter To-Dos by District

All

Assigned to

All

Employee Effective Date

All

Due Date

Last 7 days

Active To-Dos That Have Started

458

Active To-Dos

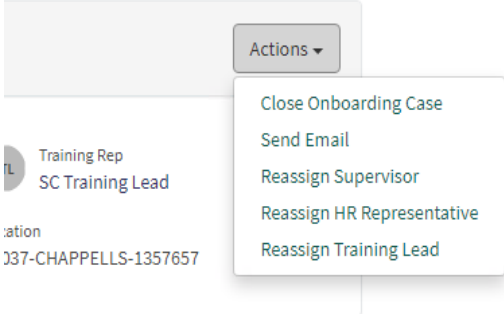
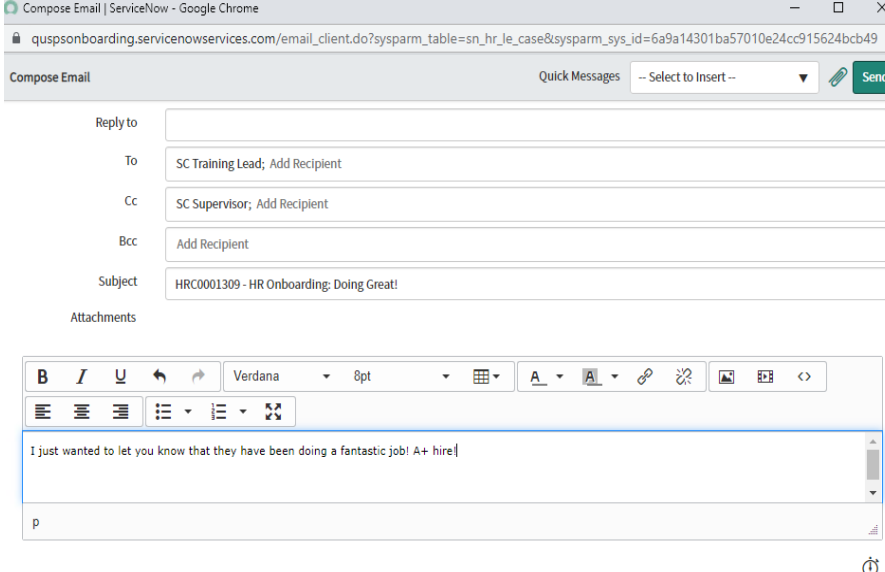
Number	Parent	Subject person	Short description	Position	Location	State	Assigned to	Due date
① HRT0004709	HRT0001115	Lisa Sattm	Enter ratings and generate 60-day review form	City Carrier Assistant, I	03033 BRISOLINE, I 1705020	Ready	NO Supervisor	2021-07-23 00:00:00
① HRT0004752	HRT0001115	Lisa Sattm	Determine if New Hire should be removed from rolls	City Carrier Assistant, I	03033 BRISOLINE, I 1705020	Ready	NO HR Representative	2021-07-23 00:00:00
① HRT0004800	HRT0001115	Lisa Sattm	Participate in 60-Day Review	City Carrier Assistant, I	03033 BRISOLINE, I 1705020	Ready	Lisa Sattm	2021-07-23 00:00:00
① HRT0004706	HRT0001115	Lisa Sattm	Schedule 60-Day Review	City Carrier Assistant, I	03033 BRISOLINE, I 1705020	Ready	NO Supervisor	2021-07-23 00:00:00
① HRT0004700	HRT0001115	Lisa Sattm	Conduct 60-Day Review	City Carrier Assistant, I	03033 BRISOLINE, I 1705020	Ready	NO Supervisor	2021-07-23 00:00:00
① HRT0000961	HRT0001489	Martha Gamble	Prepare for Orientation	ASSISTANT PUBLIC CARRIER (ABC)	29041 DAVIS STATION, I 1417320	Ready	Martha Gamble	2021-07-23 18:52:54
① HRT0001004	HRT0001251	Alveda Abbot	Contact New Hire regarding job requirements	City Carrier Assistant, I	29000 BL THORNE, I 1516043	Ready	SC Supervisor	2021-07-23 18:52:29
① HRT0001205	HRT0001251	Alveda Abbot	Prepare for Orientation	City Carrier Assistant, I	29000 BL THORNE, I 1516043	Ready	Alveda Abbot	2021-07-23 18:52:29
① HRT0001079	HRT0001251	Alveda Abbot	Send New Hire Travel & Booking information if required	City Carrier Assistant, I	29000 BL THORNE, I 1516043	Ready	SC HR Representative	2021-07-23 18:52:29
① HRT0001078	HRT0001251	Alveda Abbot	Enter Report to Work Duty Station Details	City Carrier Assistant, I	29000 BL THORNE, I 1516043	Ready	SC Supervisor	2021-07-23 18:52:29

## Sending an Email to Another System User Through ServiceNow

**Navigation:** Home > New Hire Case > Sending an Email

How to send an email through the HR Onboarding Pilot to another system user.

You can send an email through the HR Onboarding Pilot to another system user.


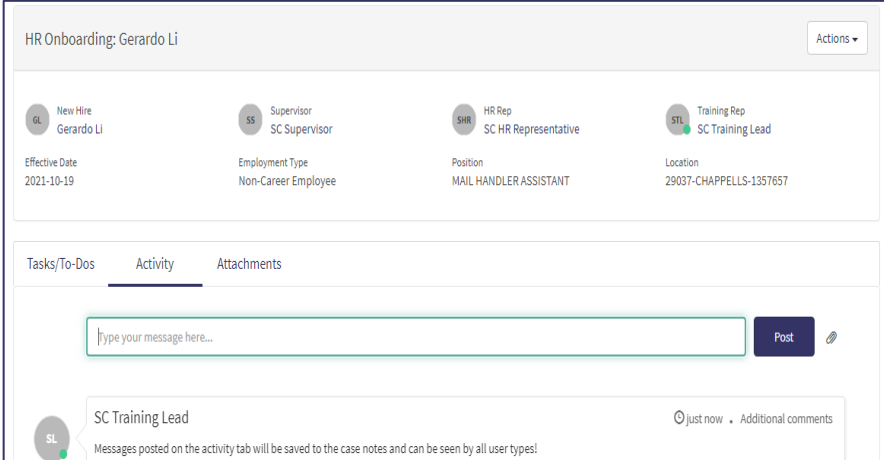
Important Step	Visual Aid
<p>1. (When logged in and with the New Hire Case open). Click the Actions dropdown menu. Then select “Send Email”.</p>	
<p>2. Fill out the Compose Email form. You can use the “Quick Messages” dropdown in the top-right to select a template message.</p>	

## Update a New Hire Case Notes

**Navigation:** Home > New Hire Case > Activity Tab

How to update New Hire Case notes.





You can update New Hire Case notes through the HR Onboarding Pilot.

Important Step	Visual Aid
<p>1. (When logged in and with the New Hire Case open). Click the Activity tab.</p>	 <p>The screenshot shows the 'HR Onboarding: Gerardo Li' page. At the top, there are four user roles: New Hire Gerardo Li, Supervisor SC Supervisor, HR Rep SC HR Representative, and Training Rep SC Training Lead. Below these, there are fields for Effective Date (2021-10-19), Employment Type (Non-Career Employee), Position (MAIL HANDLER ASSISTANT), and Location (29037-CHAPPELLS-1357657). At the bottom, there are three tabs: Tasks/To-Dos, Activity, and Attachments. The 'Activity' tab is selected and highlighted with a red box.</p>
<p>2. Type in your message in the message bar and click Post. You can also attach items to an Activity note. For example, a Trainer and Supervisor might use these notes to coordinate on rescheduling training.</p>	 <p>The screenshot shows the same 'HR Onboarding: Gerardo Li' page, but now the 'Activity' tab is active. Below the tabs, there is a message bar with the placeholder text 'Type your message here...'. To the right of the message bar is a 'Post' button. Below the message bar, there is a comment from 'SC Training Lead' with the text 'Messages posted on the activity tab will be saved to the case notes and can be seen by all user types!'. To the right of the comment is a 'just now' timestamp and a link to 'Additional comments'.</p>

## Onboarding Activities & Activity Sets

### Activity Sets

These are groups of activities that are either performed by the system or the user throughout their onboarding process. Below is a key identifying the types of activities.

-  Automated activity performed by the HR Onboarding Pilot system
-  Manual activity performed by the user
-  Notification email sent by the HR Onboarding Pilot system
-  Activity performed outside the system (included for reference - not all external activities shown)













*The New Hire will not log into the HR Onboarding Pilot tool, rather information pertaining to key Probationary period activities will be provided via email to their Personal email address.*

*New Hires will only receive emails before their effective date.*

*RCAs/ARCs will be excluded from the scheduling and completion of an automated PS Form 1750 evaluations at the 30, 60, and 80-Day reviews. They will continue to be evaluated using the same process used today and their reviews will not be captured within the HR Onboarding Pilot tool.*

### Pre-Boarding Activity Set









Below are activities in this activity set for each type of user in the HR Onboarding Pilot.

New Hire (all)	HR	Supervisors	Trainers
 New Hire is sent a Welcome Email	 New Hire Records created in Service Now	 Supervisor is copied on the Orientation and other training notification email(s) sent to the New Hire	 Coordinate with HR/Supervisor to schedule New Hire for Orientation and other required training
 New Hire is sent an Orientation Notification email so they can prepare for Orientation	 Coordinate with LDD Trainer/Supervisor to schedule New Hire for Orientation and other required training	 Contact New Hire regarding job requirements including work hours, days off and approximate number of hours per week	
 New Hire is sent other required training email notifications	 Book travel/lodging for New Hire Orientation (if new hire must drive more than 50 miles to the training site)	 Enter Report to Unit/Duty Station Details	
  New Hire receives travel and booking info (if required to drive more than 50 miles to training site). <i>Sent manually.</i>			

 Automated
  Manual
  Notification
  External

### Day 1 (of Orientation) Activity Set

Below are activities in this activity set for each type of user in the HR Onboarding Pilot.

New Hire (all)	HR	Supervisors	Trainers
 Report to Welcome to the USPS Orientation	 HR is sent an email notification if the New Hire does not report to Welcome to USPS Orientation	 Supervisor is sent an email notification if the New Hire does not report to Welcome to USPS Orientation	 Trainer reports Welcome to the USPS Orientation Day 1 "No Shows"
 Begin Welcome to the USPS Orientation	 If New Hire does not report for Orientation, HR may Notify HRSSC to remove New Hire from Rolls	 Coordinate with Trainer to schedule Shadow Day with New Hire, where applicable.	 Capture Welcome to the USPS attendance and time



Automated



Manual



Notification



External

## Week 1 Activity Set

Below are activities in this activity set for each type of user in the HR Onboarding Pilot.

New Hire (all)	HR	Supervisors	Trainers
➤ Complete and Sign Onboarding forms	➤ File Onboarding Forms from PEDC Trainer	➤ Enter New Hire's time into the Time & Attendance Collection System (TACS)	➤ Trainer facilitates New Hire training
➤ Get ID Badge Picture taken	➤ Notify HRSSC Onboarding forms are available for upload to eOPF	👤 Prepare for New Hire's First Day in the Unit/Duty Station (checklist)	➤ Trainer assists New Hire with completion of onboarding forms
➤ Complete and Sign Oath of Office form		👤 Welcome New Hire to Unit/Duty Station (checklist)	➤ Trainer takes ID Badge Photo
➤ Complete Driver Training (if applicable)		👤 Prepare for Shadow Day with New Hire (checklist), where applicable.	👤 Capture attendance and time (daily) for required training
🔔 New Hire is sent an email regarding day 1 at Unit		👤 Schedule Initial Probationary Review meeting with New Hire	➤ Trainer sends New Hire Timecard to Unit Supervisor
➤ Report to Unit/Duty station (PSE/MHA)			➤ Trainer updates Training in HERO to identify which training courses have been completed
➤ Participate in Shadow Day (if applicable)			➤ Trainer mails completed hard copy Onboarding Forms to HR



Automated



Manual



Notification



External

## Week 2 Activity Set

Below are activities in this activity set for each type of user in the HR Onboarding Pilot.

New Hire (all)	HR	Supervisors	Trainers
<ul style="list-style-type: none"> <li>Complete 4-day Rural or City Carrier Academy Training (if applicable)</li> </ul>	<ul style="list-style-type: none"> <li>File Onboarding Forms from PEDC Trainer</li> </ul>	<ul style="list-style-type: none"> <li>Enter New Hire's time into TACS</li> </ul>	<ul style="list-style-type: none"> <li>Trainer facilitates New Hire training</li> </ul>
<ul style="list-style-type: none"> <li>Complete Sales and Services Associate (Window) Training (if applicable)</li> </ul>	<ul style="list-style-type: none"> <li>Notify HRSSC Onboarding when forms are available for upload to eOPF</li> </ul>	<ul style="list-style-type: none"> <li>Supervisor sent an email reminder prior to Initial Probationary Review meeting</li> </ul>	<ul style="list-style-type: none"> <li>Capture attendance and time (daily) for required training</li> </ul>
<ul style="list-style-type: none"> <li>Report to Unit/Duty station (RCA/CCA)</li> </ul>		<ul style="list-style-type: none"> <li>Conduct Initial Probationary Review meeting with New Hire</li> </ul>	<ul style="list-style-type: none"> <li>Trainer sends New Hire Timecard to Unit Supervisor</li> </ul>
<ul style="list-style-type: none"> <li>Complete On the Job Training (OJT) (if applicable)</li> </ul>		<ul style="list-style-type: none"> <li>Supervisor sent an email reminder to schedule the 30-Day Review</li> </ul>	<ul style="list-style-type: none"> <li>Trainer updates Training in HERO to identify which training courses have been completed</li> </ul>
<ul style="list-style-type: none"> <li>Participate in Initial Probationary Review meeting</li> </ul>		<ul style="list-style-type: none"> <li>Schedule 30-Day Review w/ New Hire</li> </ul>	<ul style="list-style-type: none"> <li>Trainer mails completed hard copy Onboarding Forms to HR</li> </ul>



Automated



Manual



Notification

















External



### 30-Day Activity Set

Below are activities in this activity set for each type of user in the HR Onboarding Pilot.

New Hire (non-RCA/ARC)	HR	Supervisors	Trainers
 Participate in 30-Day Review	 HR is sent an email notification if the New Hire is not recommended for retention following their review	 Enter ratings and generate 30-Day review form (PS Form 1750)	No Activities
 Acknowledge 30-Day Review	 If New Hire is not recommended for retention, remove from rolls per Supervisor recommendation	 Conduct 30-Day Review w/ New Hire	
 Complete additional training (if required)	 HRSSC is sent an email notification if the New Hire's case is closed in Service Now	 Acknowledge review was held and indicate whether employee signed	
 New Hire receives Written Notification if released		 File hardcopy form until next review	
		 Supervisor sent an email reminder to schedule the 60-Day Review	
		 Schedule 60-Day Review w/ New Hire	
		 Close case due to separation if New Hire is not recommended for retention	



Automated



Manual

















Notification



External

## 60-Day Activity Set

Below are activities in this activity set for each type of user in the HR Onboarding Pilot.

New Hire (non-RCA/ARC)	HR	Supervisors	Trainers
 Participate in 60-Day Review	 HR is sent an email notification if the New Hire is not recommended for retention following their review	 Enter ratings and generate 60-Day review form (PS Form 1750)	No Activities
 Acknowledge 60-Day Review	 If New Hire is not recommended for retention, remove from rolls per Supervisor recommendation	 Conduct 60-Day Review w/ New Hire	
 Complete additional training (if required)	 HRSSC is sent an email notification if the New Hire's case is closed in Service Now	 Acknowledge review was held and indicate whether employee signed	
 New Hire receives Written Notification if released		 File hardcopy form until next review	
		 Supervisor sent an email reminder to schedule the 80-Day Review	
		 Schedule 80-Day Review w/ New Hire	
		 Close case due to separation if New Hire is not recommended for retention	



Automated



Manual



Notification



External

## 80-Day Activity Set

Below are activities in this activity set for each type of user in the HR Onboarding Pilot.

New Hire (non-RCA/ARC)	HR	Supervisors	Trainers
<p>➤ Participate in 80-Day Review</p>	<p>🔔 HR is sent an email notification if the New Hire is not recommended for retention following their review</p>	<p>👤 Enter ratings and generate 80-Day review form (PS Form 1750)</p>	No Activities
<p>➤ Acknowledge 80-Day Review</p>	<p>➤ If New Hire is not recommended for retention, remove from rolls per Supervisor recommendation</p>	<p>➤ Conduct 80-Day Review w/ New Hire</p>	
<p>➤ Complete additional training (if required)</p>	<p>🔔 HRSSC sent an email if the New Hire's case is closed in Service Now</p>	<p>👤 Acknowledge review was held and indicate whether employee signed</p>	
<p>➤ New hire receives a copy of Form 1750 Page 2</p>	<p>🔔 HR is sent an email when the New Hire case is closed</p>	<p>➤ Mail HR complete forms &amp; provide copy to New Hire</p>	
<p>➤ Probationary Period Ends</p>	<p>➤ Notify HRSSC when Probationary forms are available for upload to eOPF</p>	<p>👤 Close case due to separation if New Hire is not recommended for retention</p>	
<p>➤ New Hire receives Written Notification if released</p>		<p>🔔 Supervisor sent an email when the New Hire case is closed</p>	

 Automated
  Manual
  Notification
  External