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UNITED STATES
POSTAL SERVICE

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,

David E. Mills
Director
Labor Relations Policies and Programs

Enclosures

475 L'ENFANT PLAZA SW
WASHINGTON DC 20260-4101
WWW.USPS.COM

HR Onboarding Pilot

HR Coordinator

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

- 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

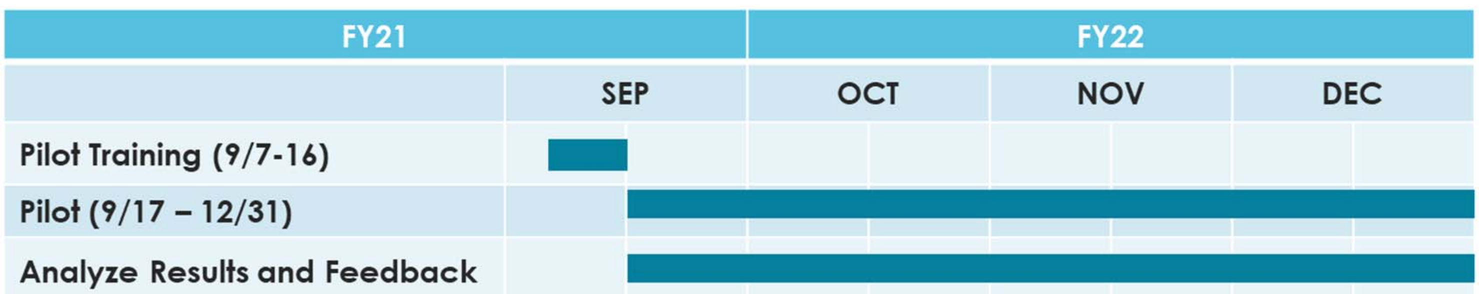
Click to add text

Project Overview – HR Onboarding Pilot

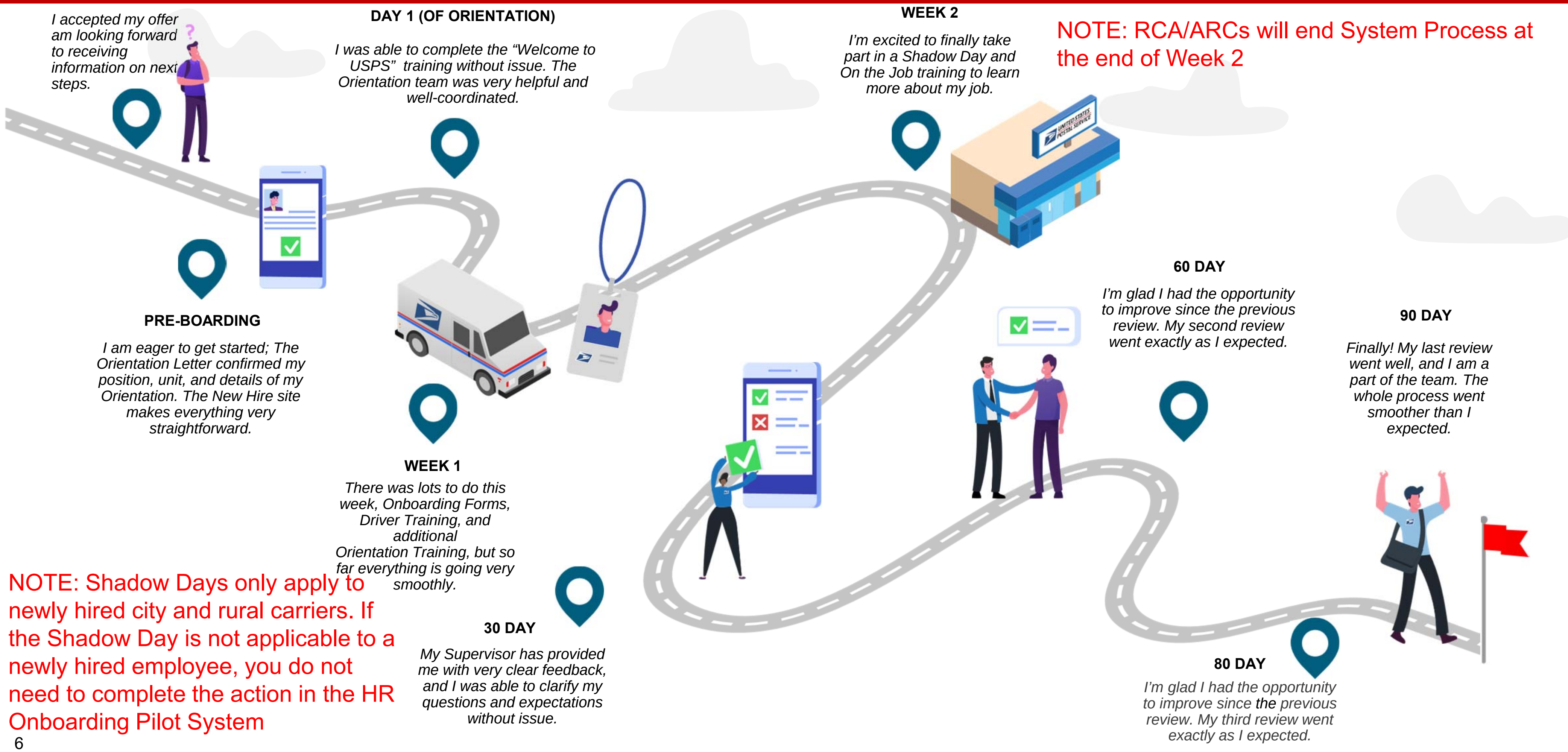
Project Overview

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



Project Overview - USPS HR Onboarding Pilot Journey Map



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

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.

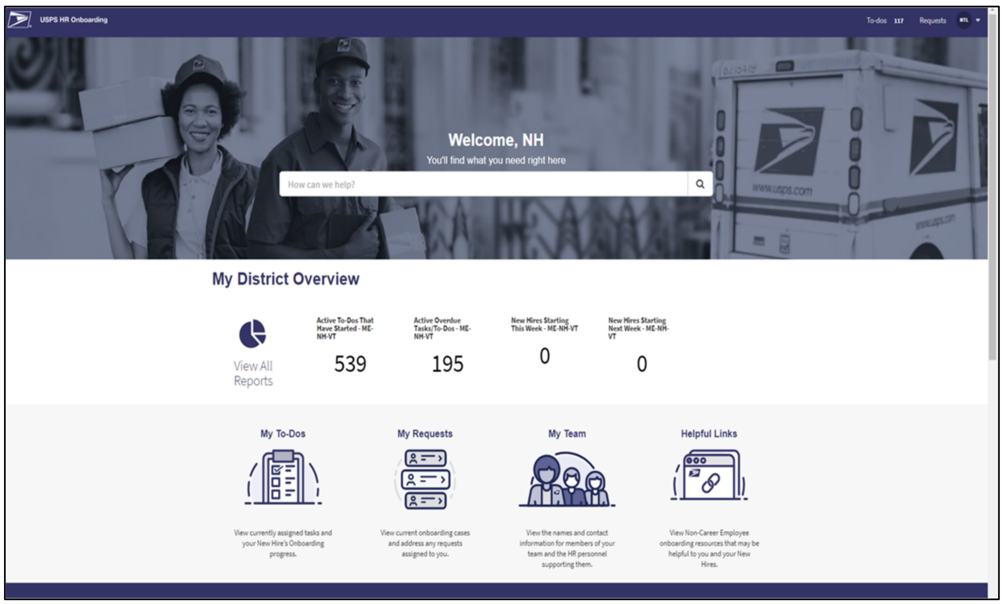
Portal

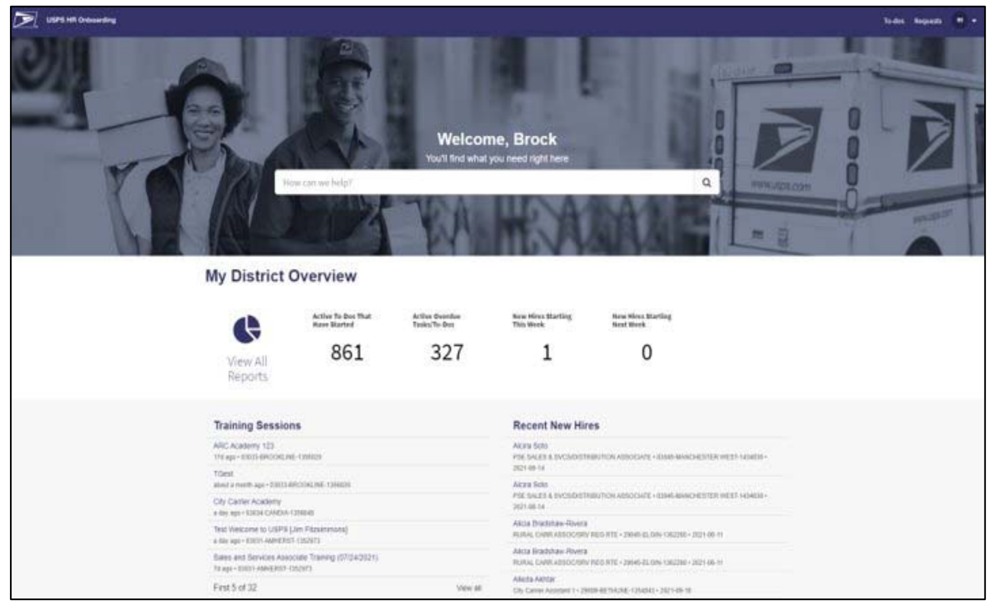
Onboarding Portal

Supervisors will access the Pilot through the Onboarding Portal

Training Portal

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



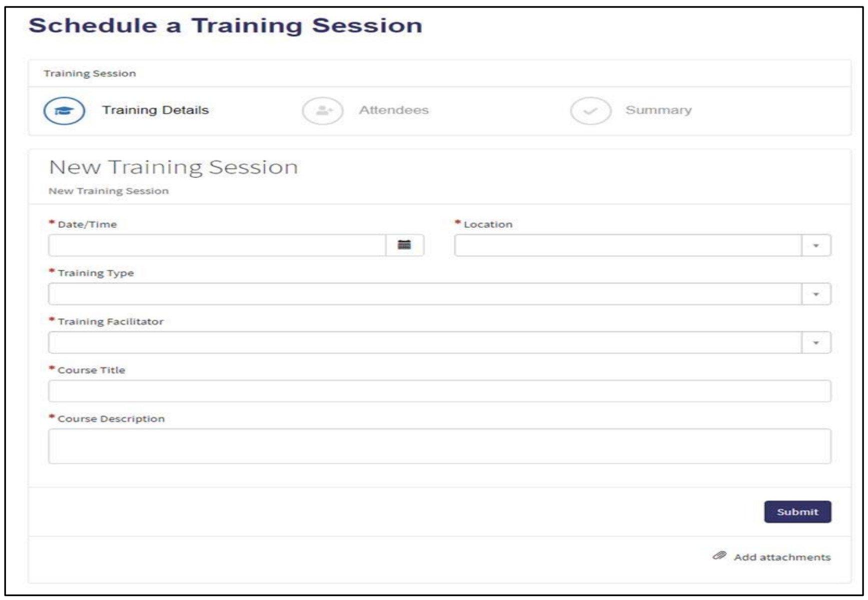


Training Widget – Scheduling a Session

The HR Onboarding "Training Widget" provides a convenient method for Trainers to create, schedule, and mark attendance for orientation and training sessions <u>in bulk</u>

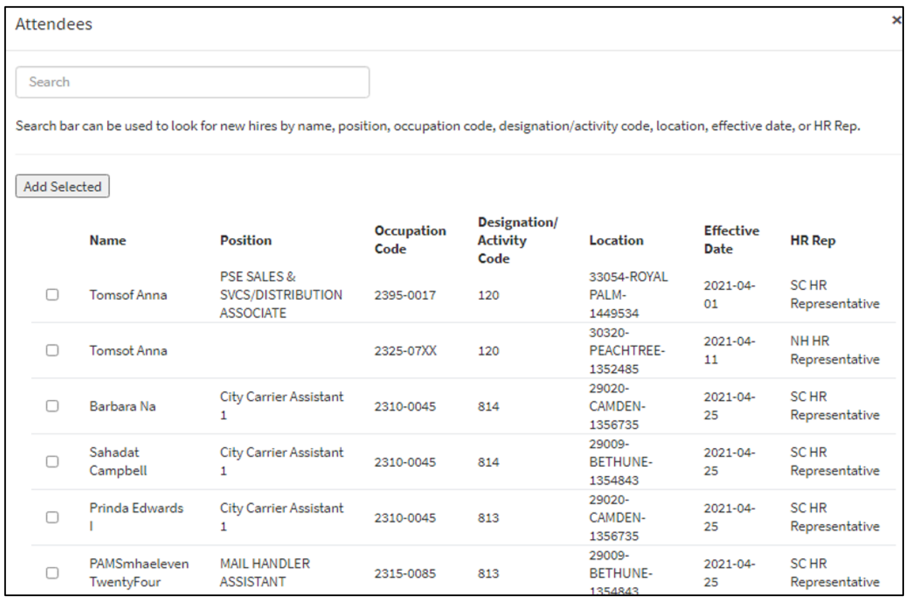
Schedule a Training Session:

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



Add Attendees:

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


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
☐	Tomsof Anna	PSE SALES & SVCS/DISTRIBUTION ASSOCIATE	2395-0017	120	33054-ROYAL PALM-1449534	2021-04-01	SC HR Representative
☐	Tomsot Anna		2325-07XX	120	30320-PEACHTREE-1352485	2021-04-11	NH HR Representative
☐	Barbara Na	City Carrier Assistant 1	2310-0045	814	29020-CAMDEN-1356735	2021-04-25	SC HR Representative
☐	Sahadat Campbell	City Carrier Assistant 1	2310-0045	814	29009-BETHUNE-1354843	2021-04-25	SC HR Representative
☐	Prinda Edwards I	City Carrier Assistant 1	2310-0045	813	29020-CAMDEN-1356735	2021-04-25	SC HR Representative
☐	PAMSmhaeleven TwentyFour	MAIL HANDLER ASSISTANT	2315-0085	813	29009-BETHUNE-1354843	2021-04-25	SC HR Representative

Training Widget – Managing Sessions & Attendance

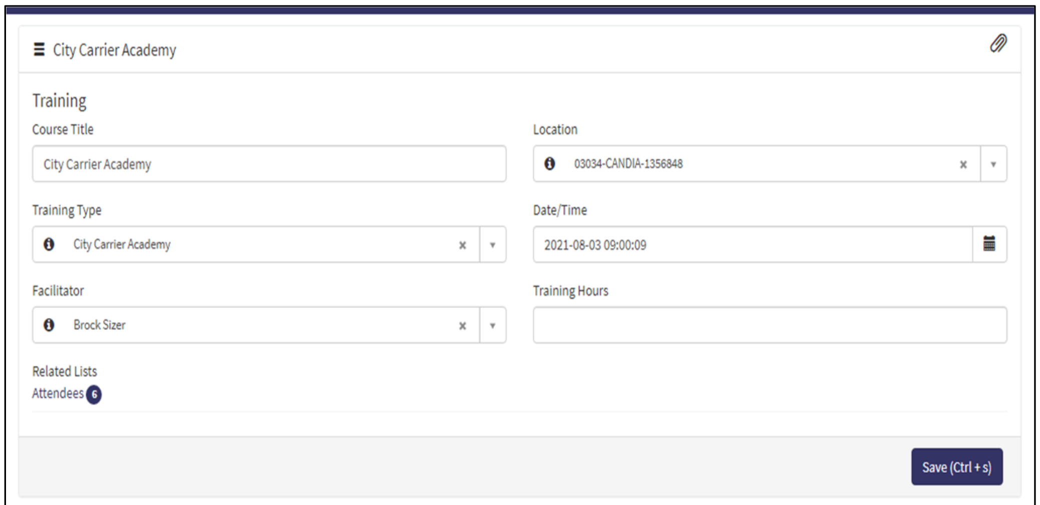
The HR Onboarding “Training Widget” provides a convenient method for Trainers to create, schedule, and mark attendance for orientation and training sessions <u>in bulk</u>

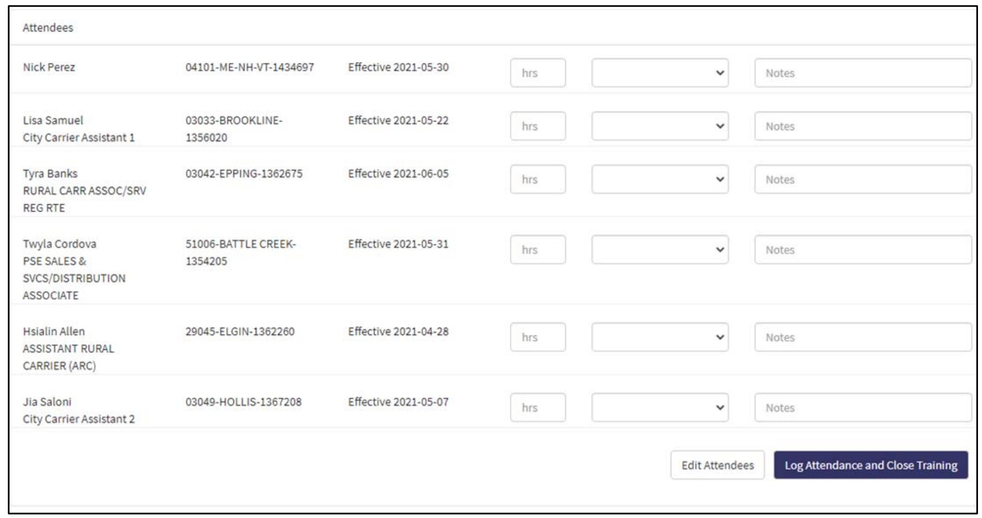
Edit Session Details:

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

Mark Attendance:

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



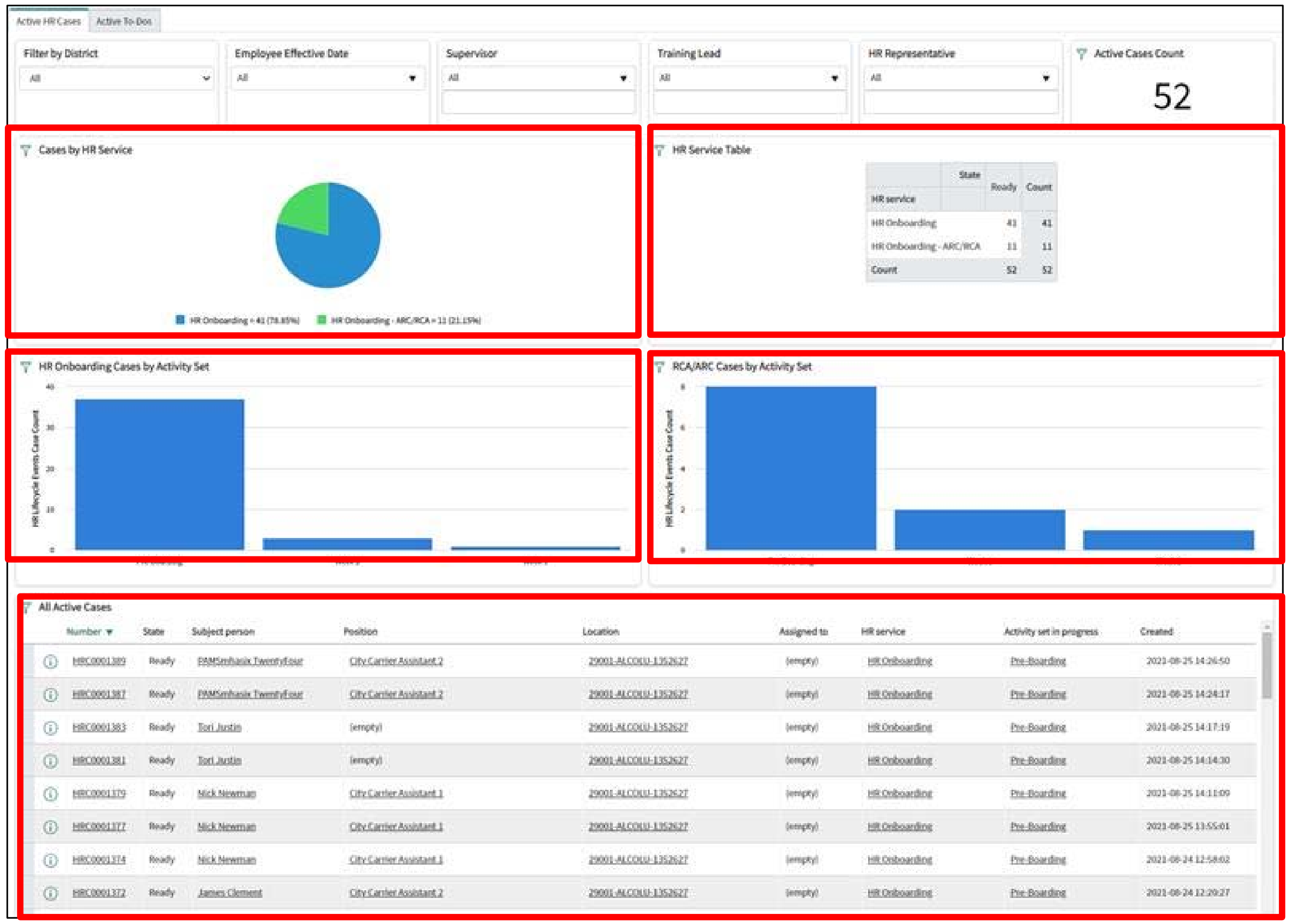


Module 2

Dashboard & Reporting

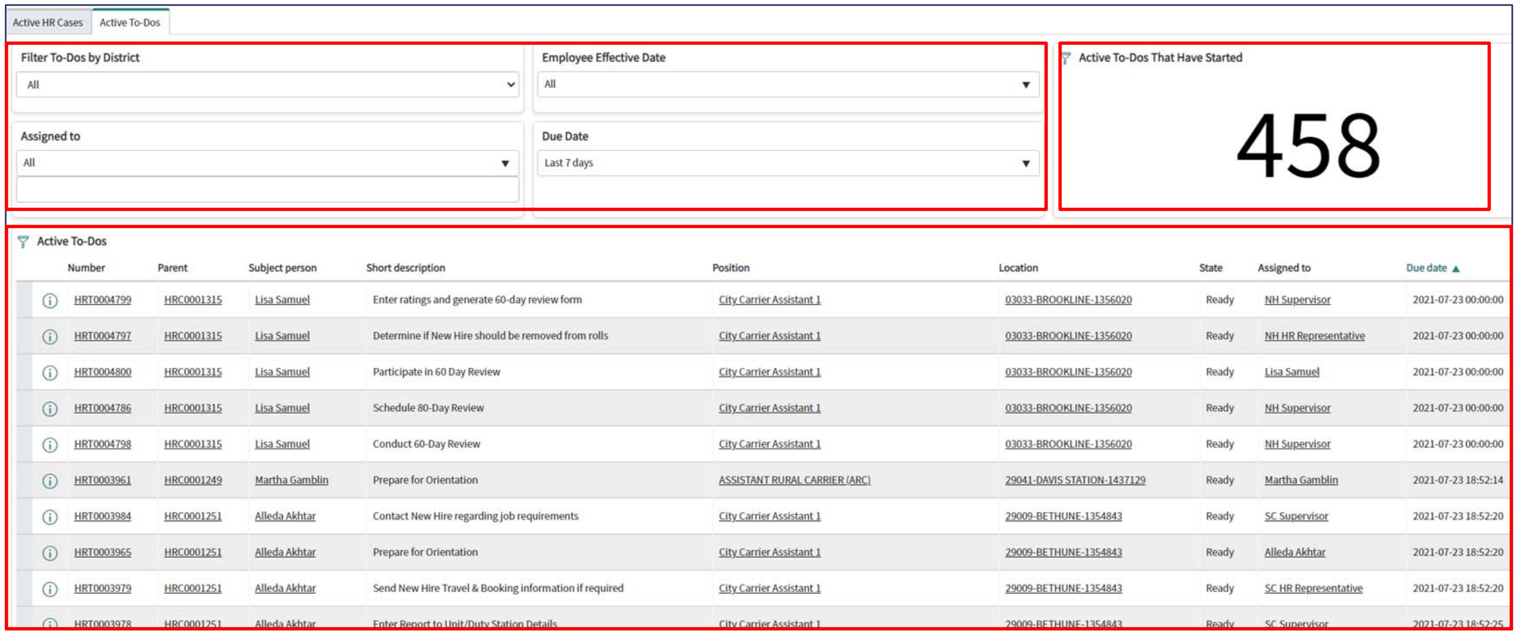
Dashboard & Reporting – Active HR Cases

- **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

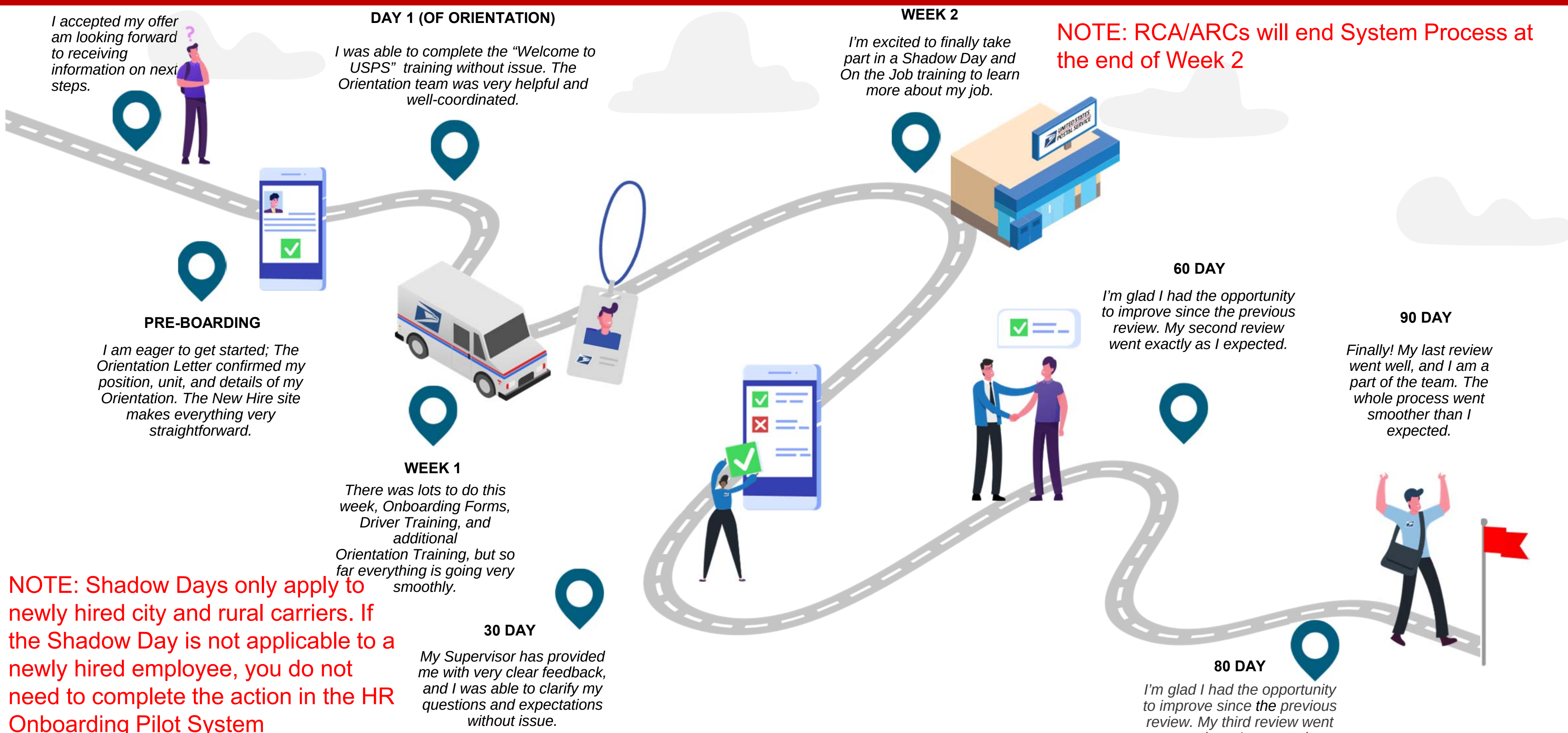


NOTE: *HR Onboarding Pilot fulfiller users (Supervisors, Trainers, HR Representatives) can create their own reports and share the report with specific users and/or groups. Instructions in the corresponding Lab.*

Module 3

Workflow - Supervisor Tasks

Project Overview - USPS HR Onboarding Pilot Journey Map

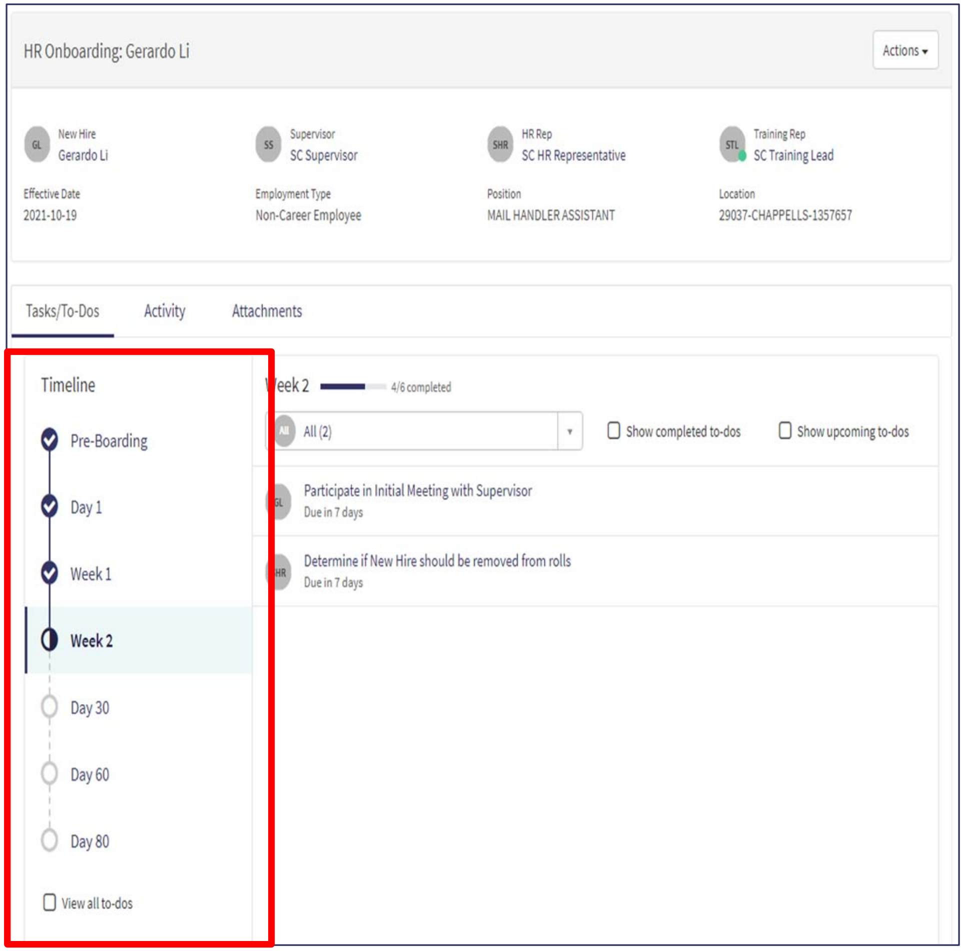


Workflow – Activity Sets

Activity Sets:

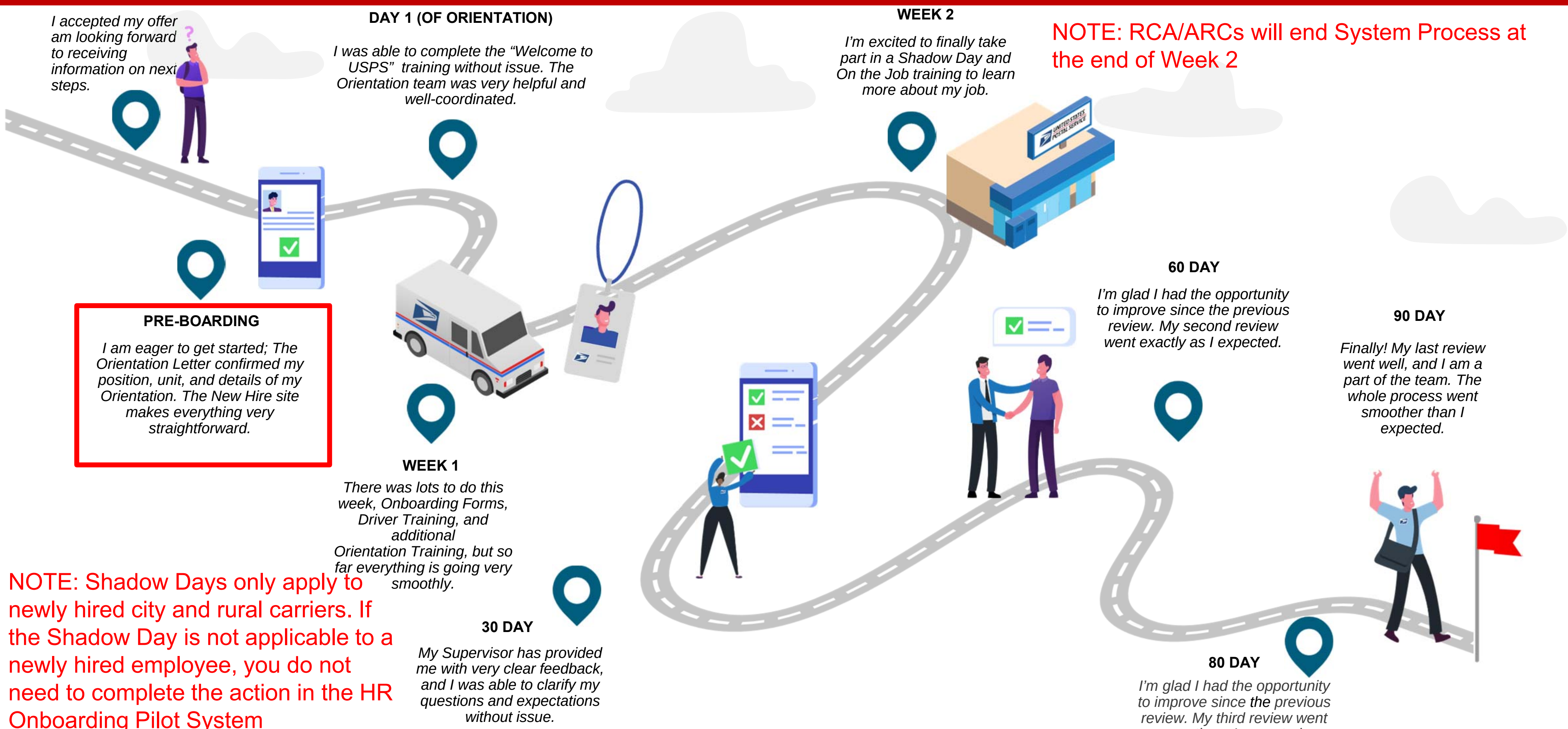
Depict the stages of the onboarding process, they can include:

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



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

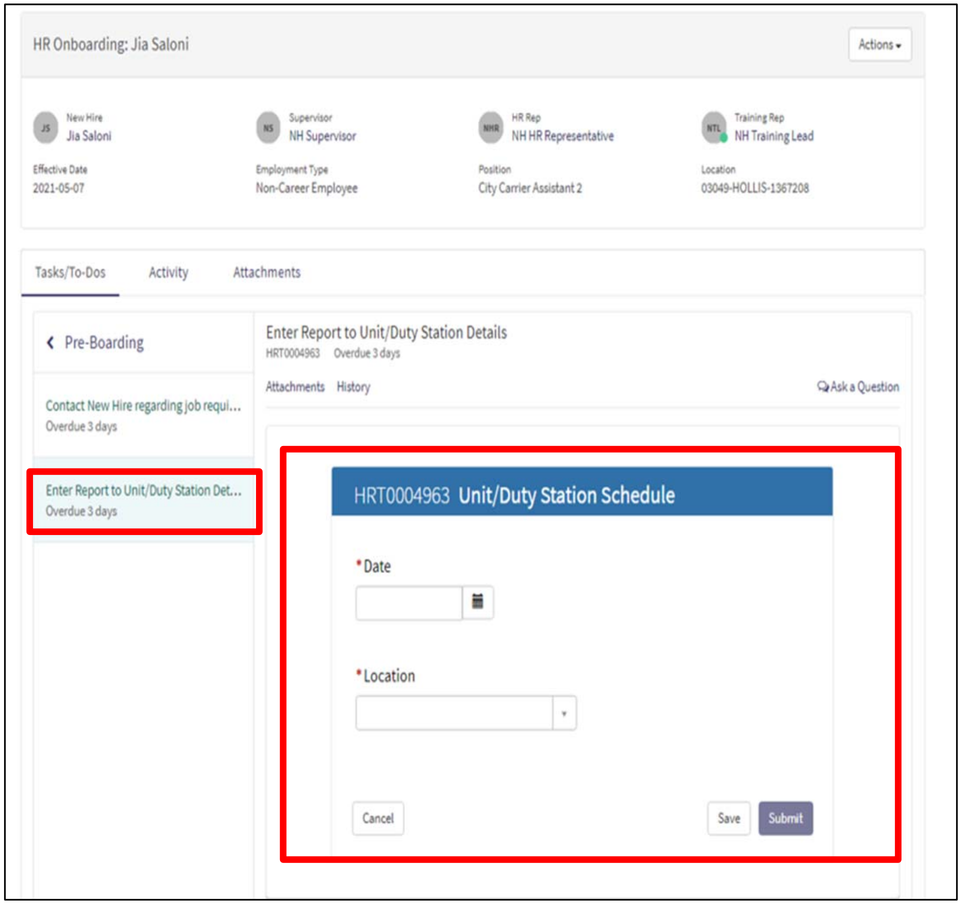
Project Overview - USPS HR Onboarding Pilot Journey Map



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

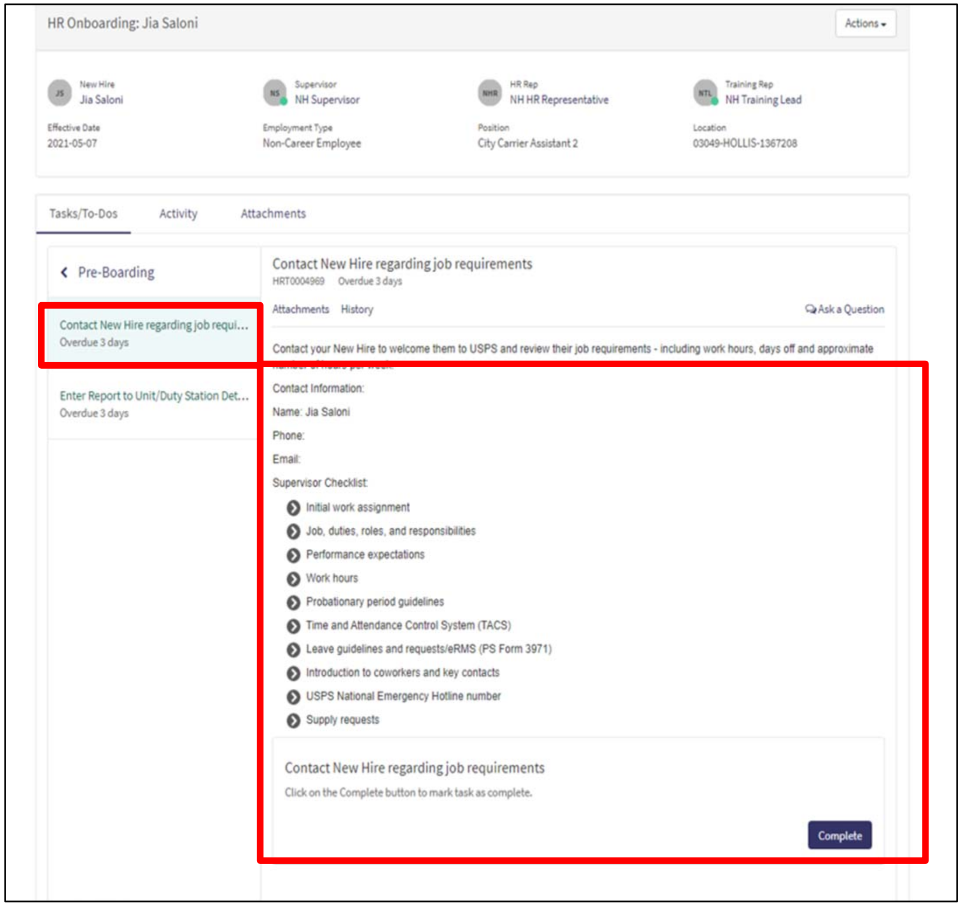


NOTE: *If the task is completed prior to the New Hire's effective date, a system generated email containing the relevant information will be sent. However, if the task is completed past the New Hire's effective date, no system generated email will be sent to the New Hire and it will be the responsibility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

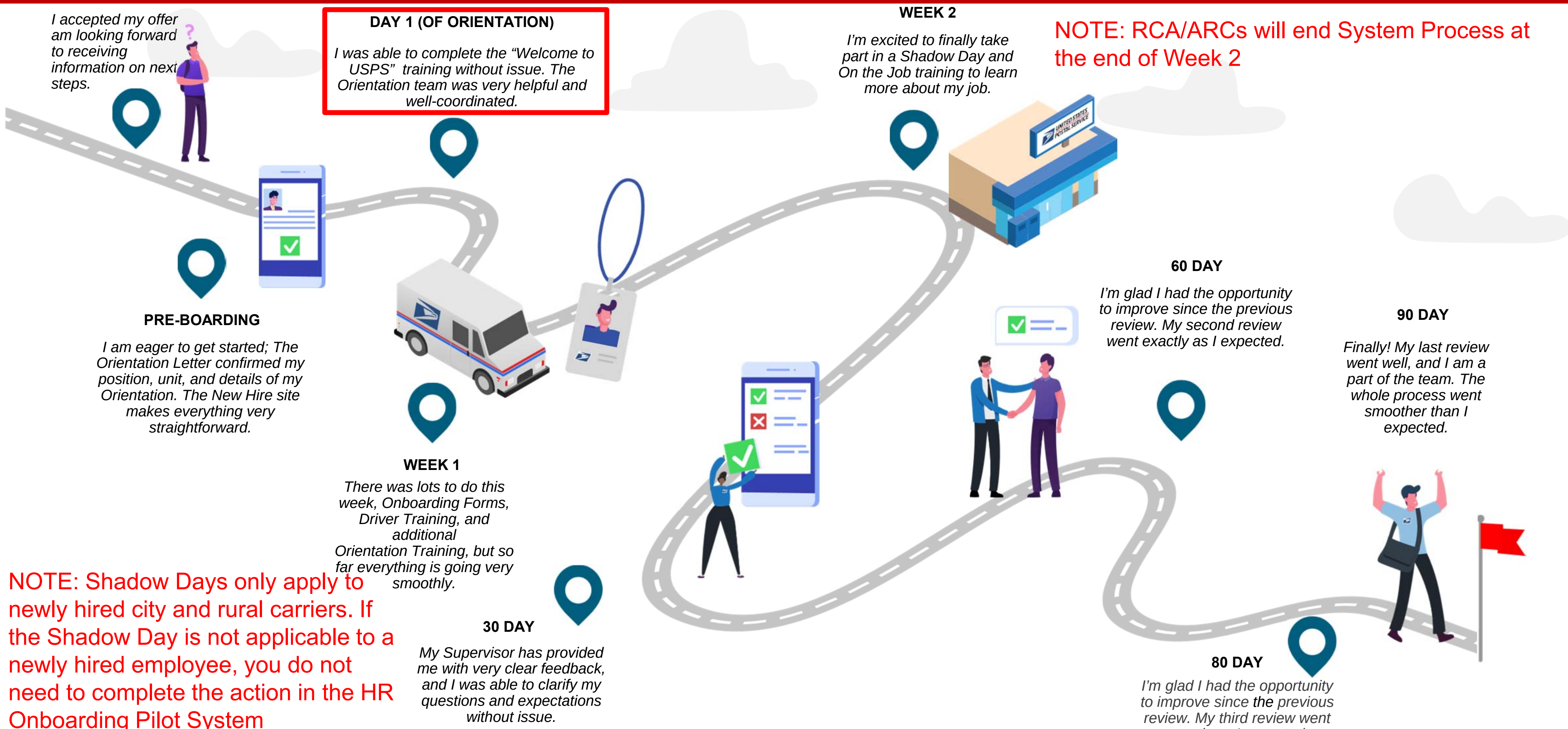
Workflow – Preboarding Tasks

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

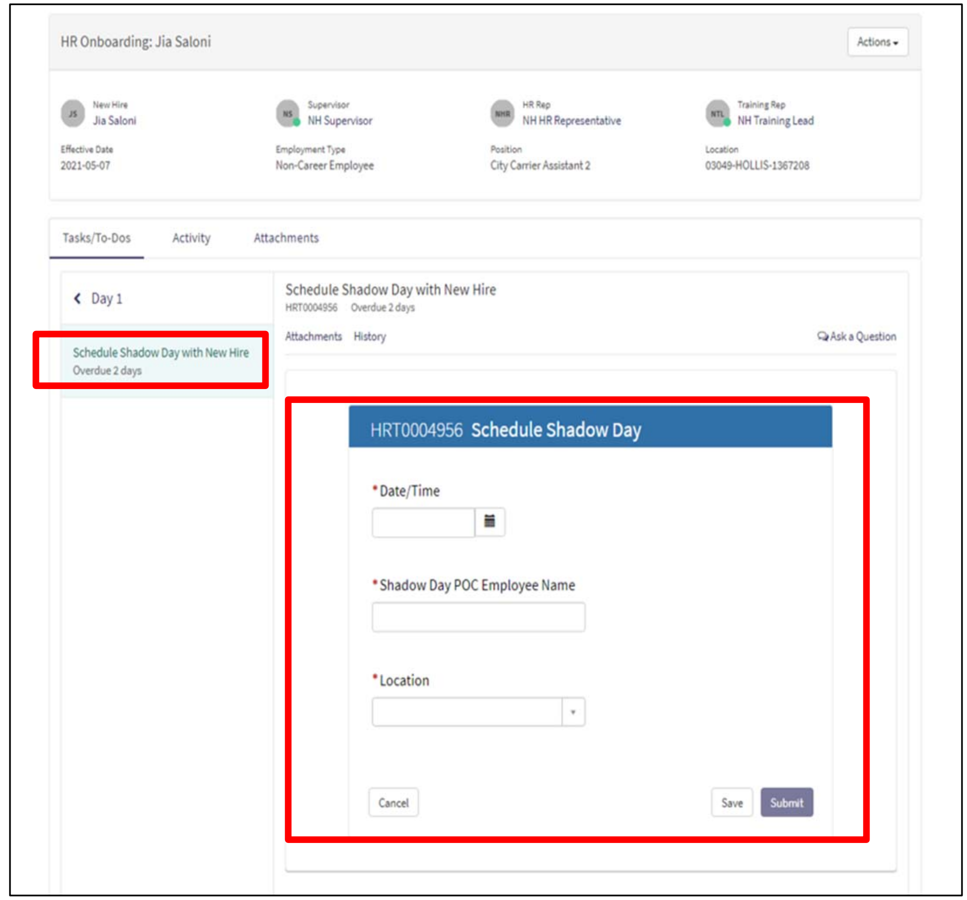


Project Overview - USPS HR Onboarding Pilot Journey Map



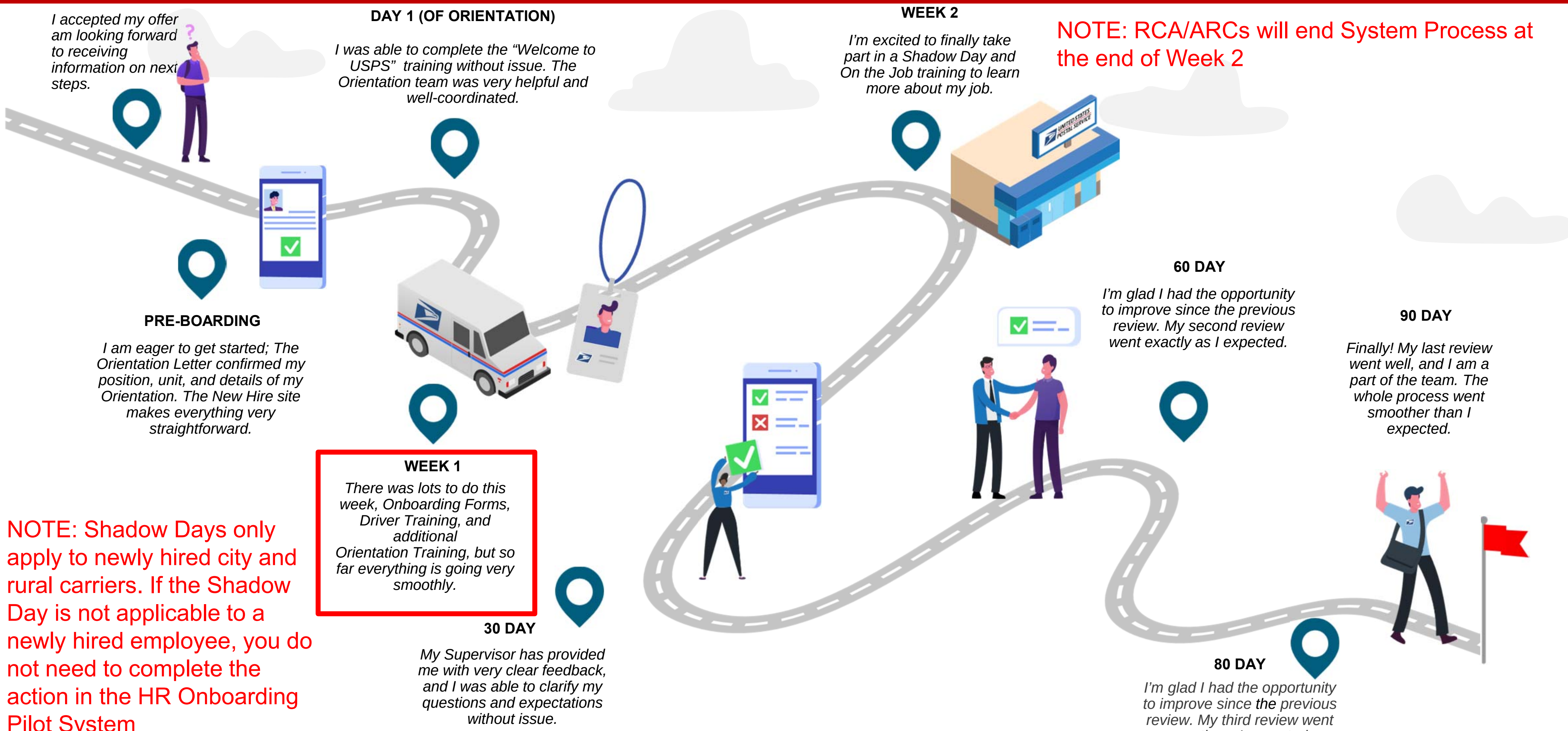
Schedule Shadow Day:

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*

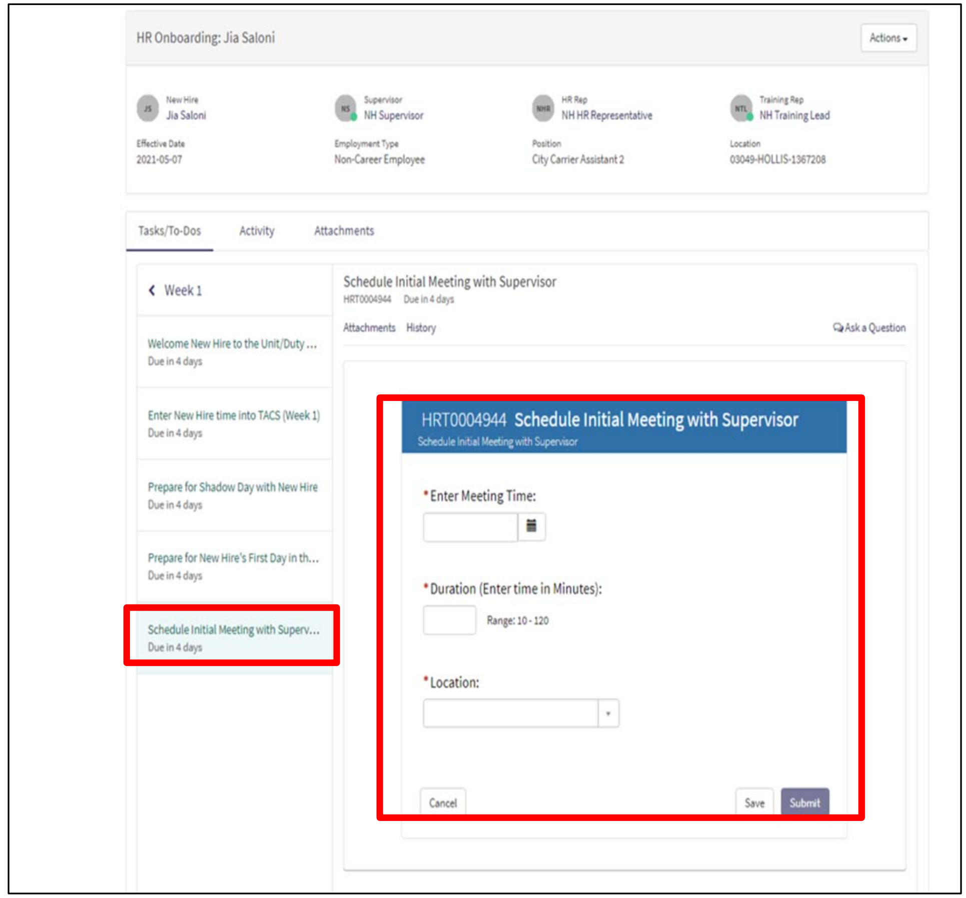
Project Overview - USPS HR Onboarding Pilot Journey Map



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

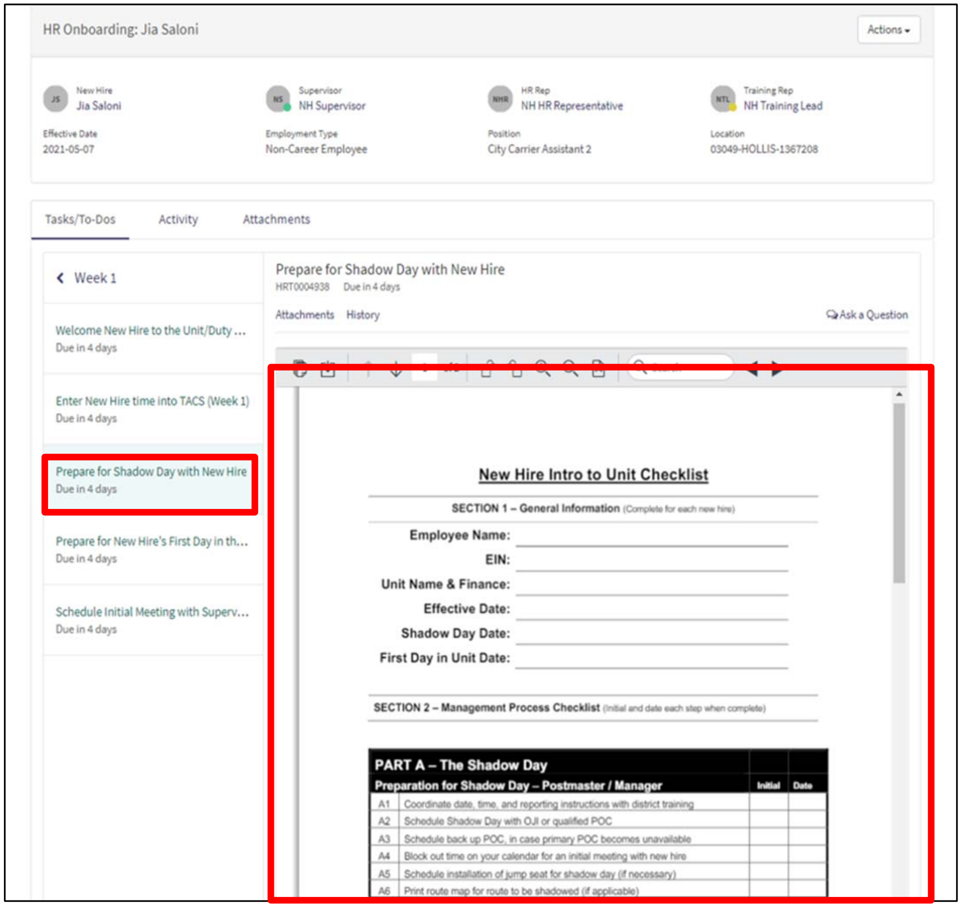


***NOTE:** If the task is completed prior to the New Hire's effective date, a system generated email containing the relevant information will be sent. However, if the task is completed past the New Hire's effective date, no system generated email will be sent to the New Hire and it will be the responsibility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

Workflow – Week 1 Tasks

Shadow Day Checklist:

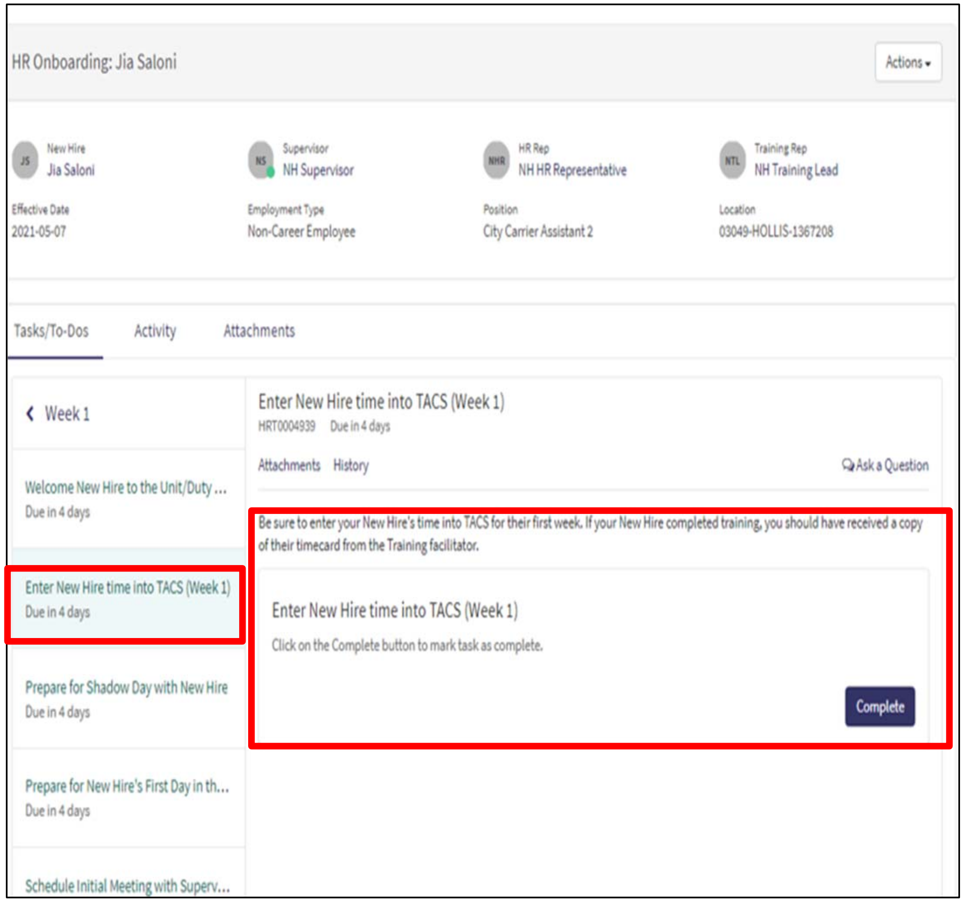
If applicable Supervisors can use this checklist to view how they can prepare for the New Hire's Shadow Day. Supervisors can download the checklist displayed in the task



Workflow – Week 1 Tasks

Enter Time in TACs:

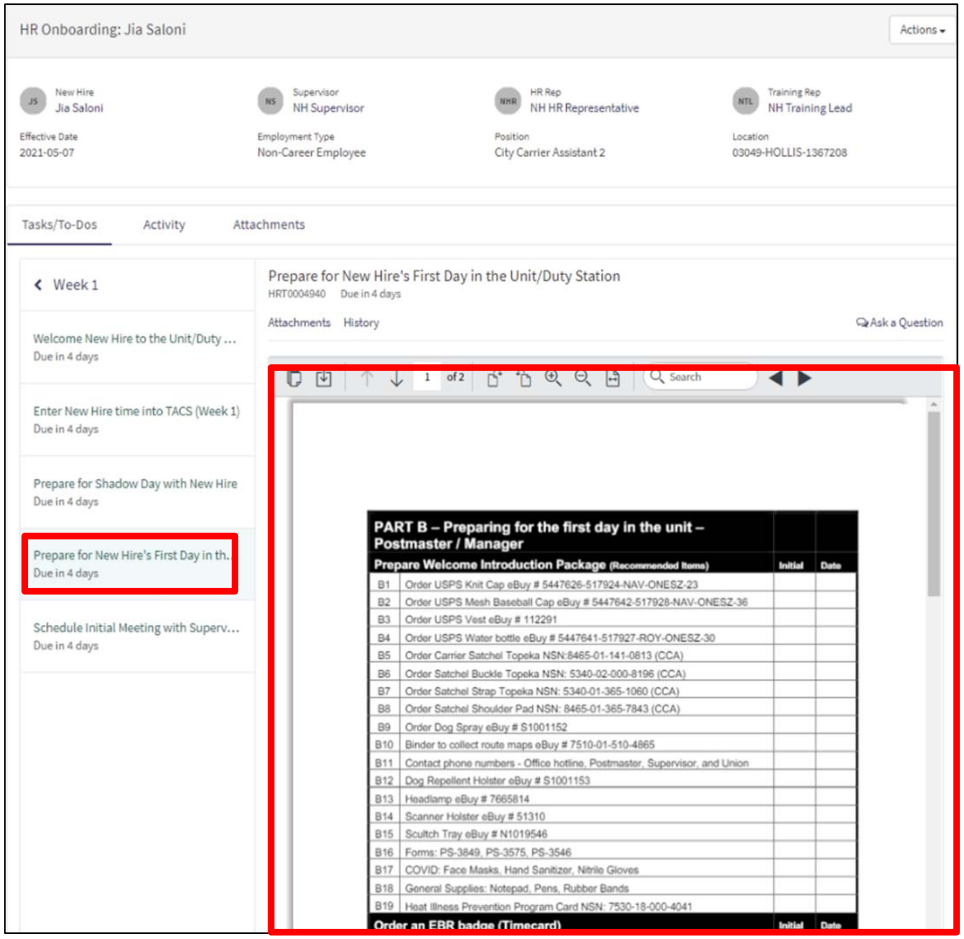
This task is a reminder for Supervisor's to enter the New Hire's time in the Time and Attendance System (TACs) outside of the HR Onboarding Pilot system



Workflow – Week 1 Tasks

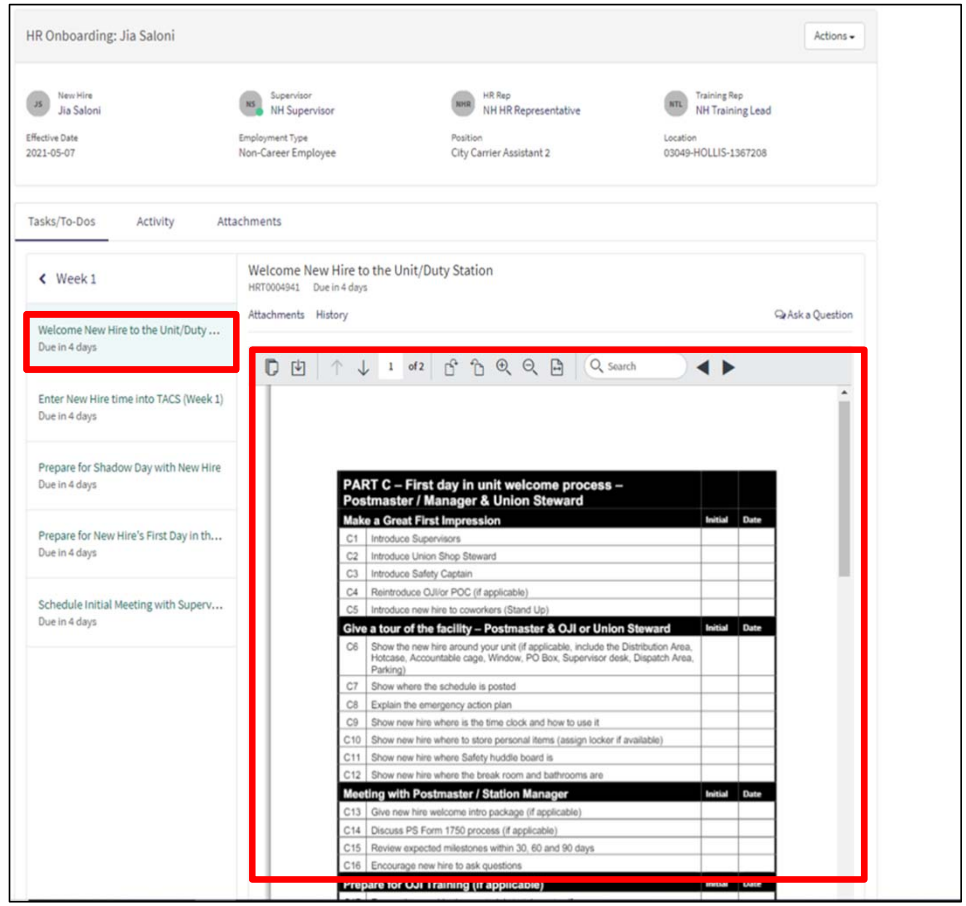
Prepare for New Hire's first day Unit/Duty Station:

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

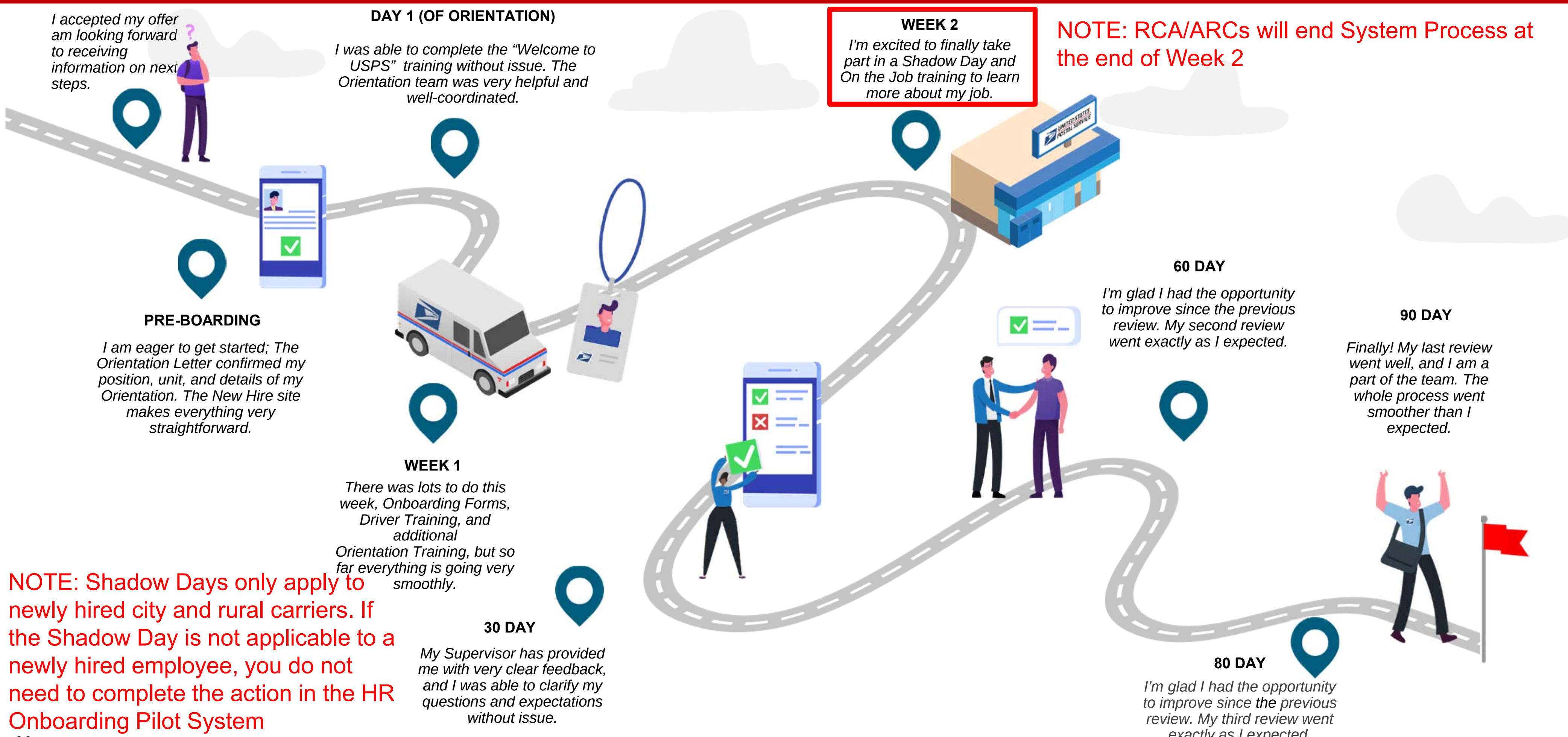


Welcome New Hire to Unit/Duty Station:

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



Project Overview - USPS HR Onboarding Pilot Journey Map



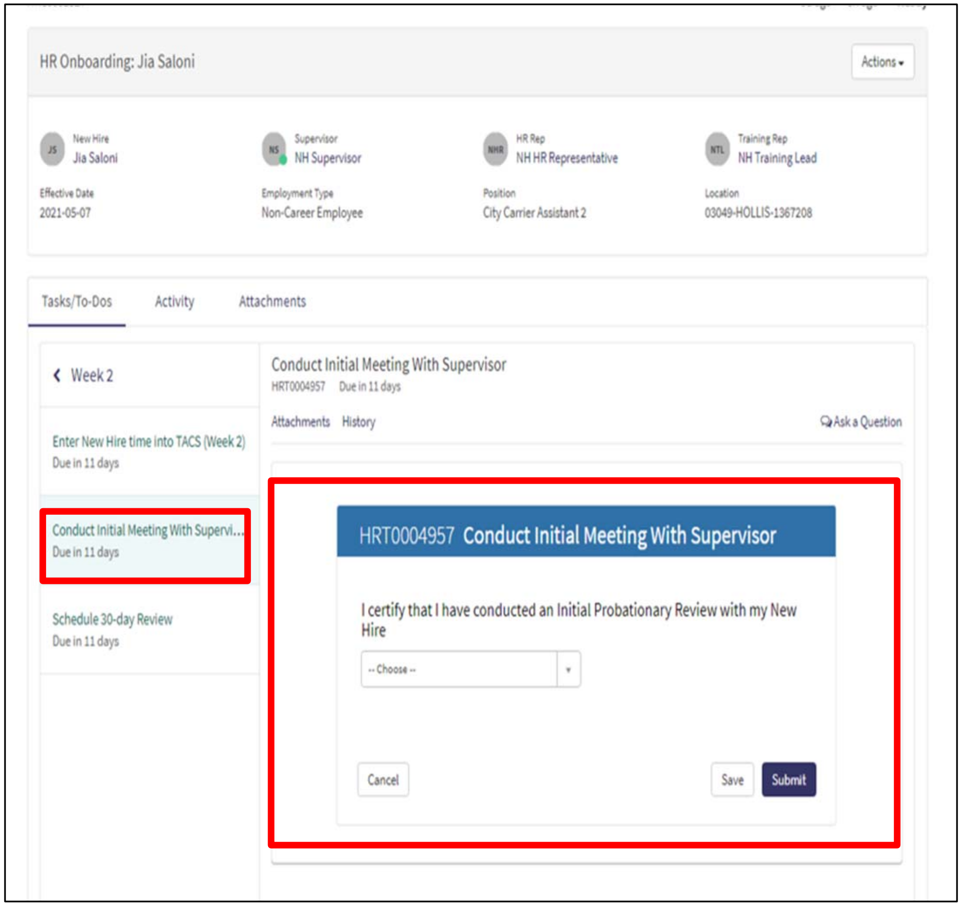
NOTE: RCA/ARCs will end System Process at the end of Week 2

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:

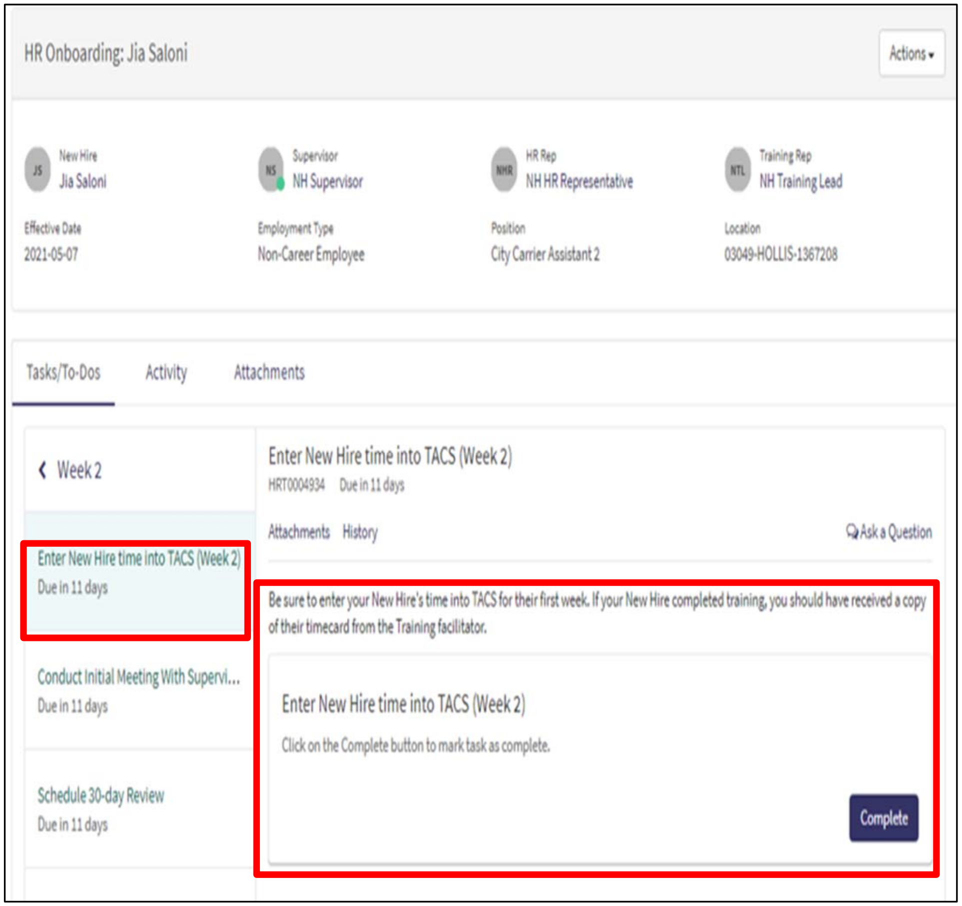
Through this task Supervisors confirm they have conducted the initial probationary meeting with the New Hire.



Workflow – Week 2 Tasks

Enter Time in TACs:

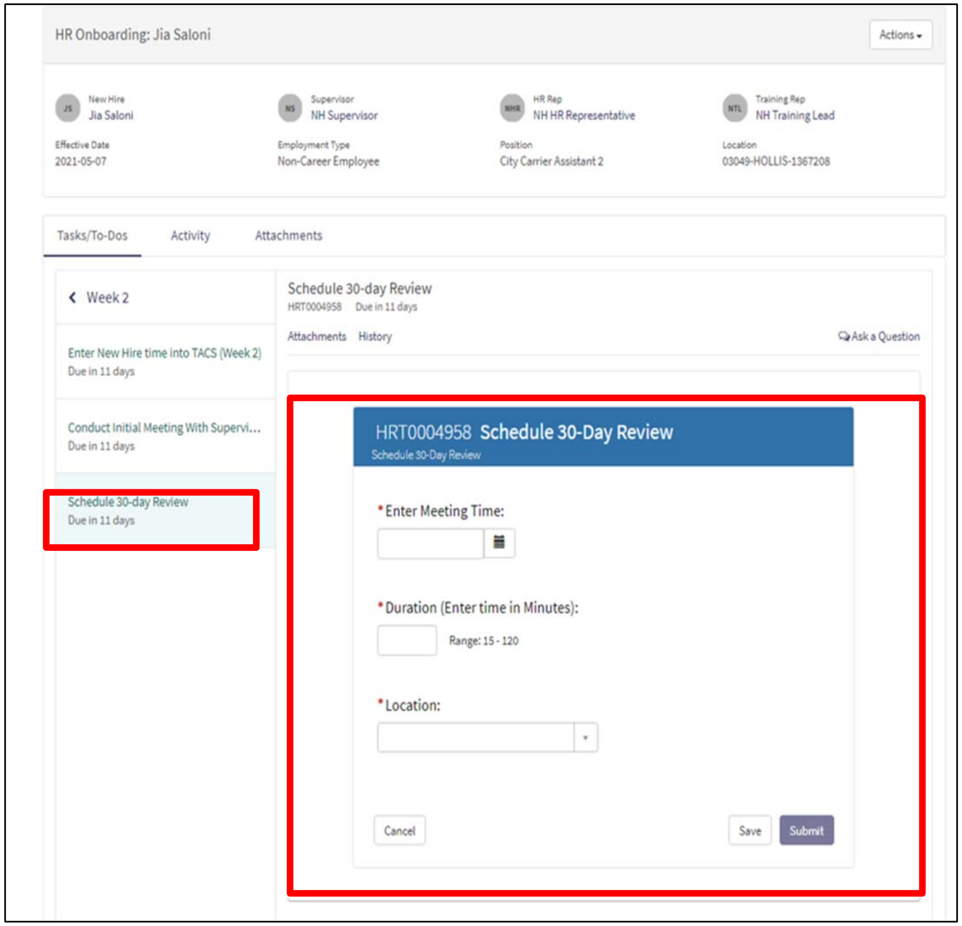
This task is a reminder for Supervisor's to enter the New Hire's time in the Time and Attendance System (TACs) outside of the HR Onboarding Pilot system.



Workflow – Week 2 Tasks

Scheduling 30-Day Review:

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

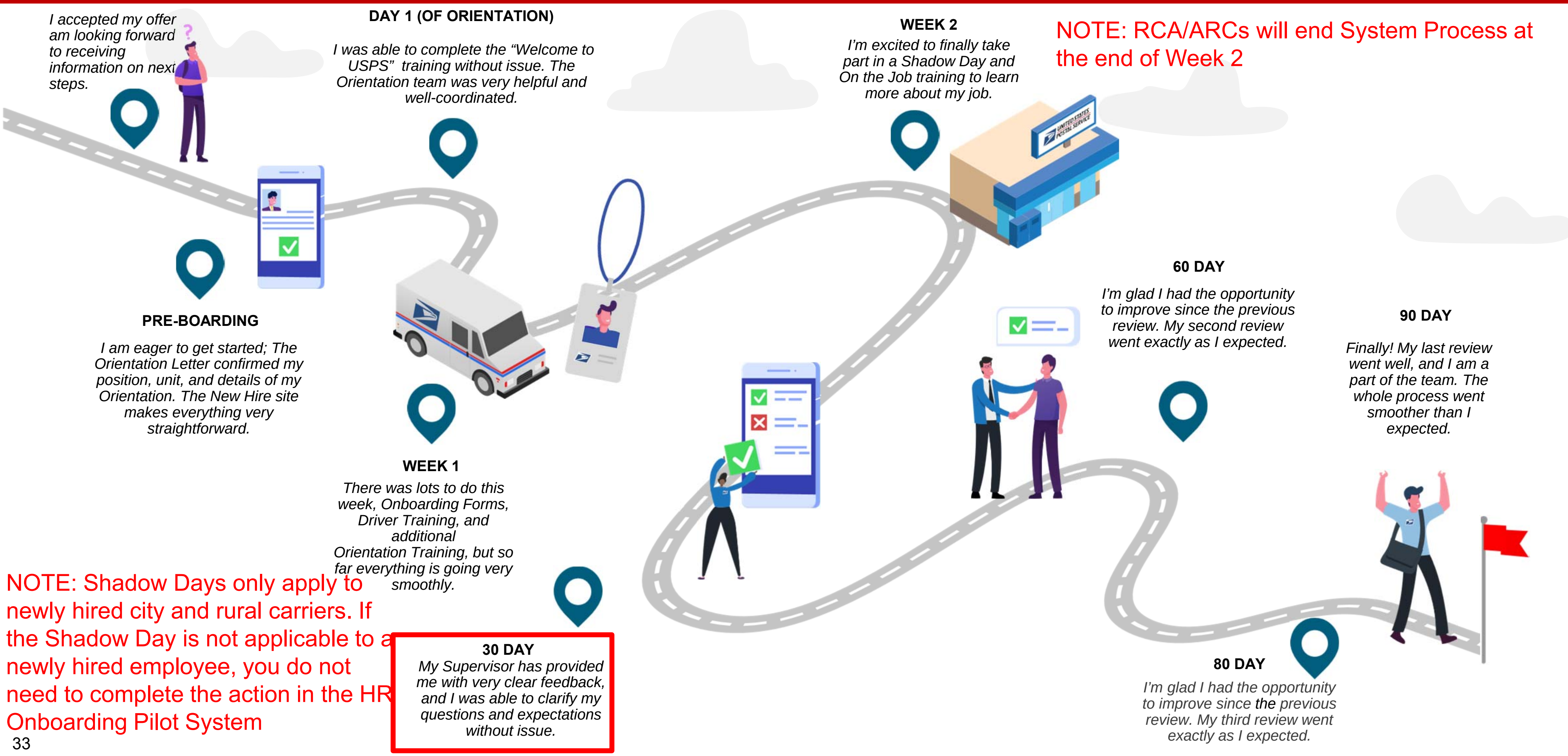


***NOTE**: There are no additional tasks past this point for Supervisors associated to a RCA/ARC case. The following tasks and activity sets will ONLY be triggered for non-RCA/ARC New Hires.*

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.

Project Overview - USPS HR Onboarding Pilot Journey Map

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

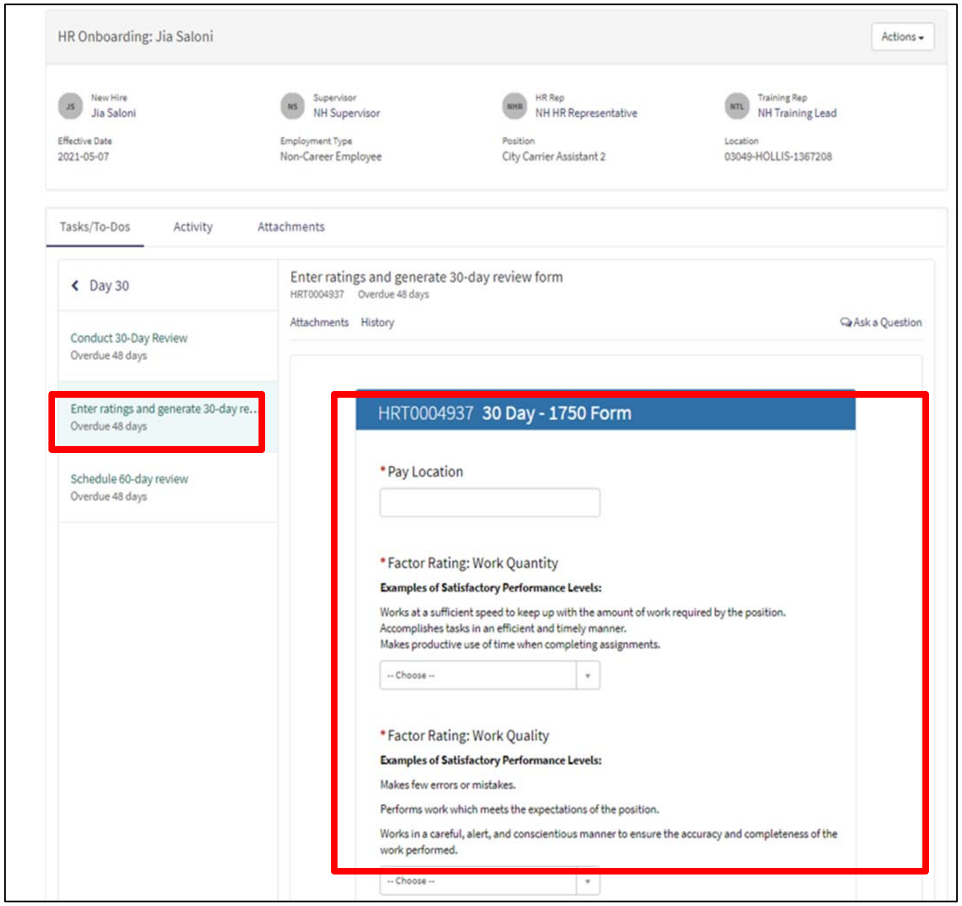


NOTE: Shadow Days only apply to newly hired city and rural carriers. If the Shadow Day is not applicable to a newly hired employee, you do not need to complete the action in the HR Onboarding Pilot System

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.*

Workflow – Day 30

UNITED STATES POSTAL SERVICE

Employee Evaluation and/or Probationary Report

(See Instructions on Reverse)

1. Employee's Name *(First, MI, Last)*			2. Employee Social Security Number	
Jia Saloni			061359902	
3. Title		4. Pay Location	5. Appointment Date	6. Date Probationary Period Ends
City Carrier Assistant 2		123	2021-05-07	2021-08-05

7a. Complete 30-Day Report By:	8a. Complete 60-Day Report By:	9a. Complete 80-Day Report By:	10a. Complete Year End Report By:
2021-06-05	2021-07-05	2021-07-25	2022-05-06
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 O B O C S D O E S F S	A ___ B ___ C ___ D ___ E ___ F ___	A ___ B ___ C ___ D ___ E ___ F ___	A ___ B ___ C ___ D ___ E ___ F ___
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)*

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)*.

O = *OUTSTANDING* S = *SATISFACTORY* U = *UNACCEPTABLE* NO = *NOT OBSERVED*

Factor	Examples of Satisfactory Performance Levels
A. Work Quantity	■ 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.
B. Work Quality	■ 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.
C. Dependability	■ Completes work assignments without unnecessary supervision. ■ Takes responsibility for completing his/her own work. ■ Reports to work on time. ■ Demonstrates satisfactory attendence.
D. Work Relations	■ Maintains positive working relationships with others. ■ Works harmoniously with others in getting the work done. ■ Cooperates well with co-workers, supervisors, and others with whom he/she comes into contact.
E. Work Methods	■ Handles equipment and/or work materials in an appropriate manner. ■ Consistently observes proper safety rules and practices. ■ Understands and follows oral and/or written instructions.
F. Personal Conduct	■ Conducts himself/herself in a manner appropriate to the work setting. ■ Maintains an appropriate appearance for the position. ■ Demonstrates a positive approach toward work, co-workers, and supervisors. ■ Demonstrates a willingness to handle all assignments. ■ Demonstrates flexibility in moving from one task to another as needed.

Have Expectations Been Jointly Discussed?
☒ Yes ☐ No Initials: ________ *(Supervisor)* ________ *(Employee)*

Would You Recommend This Person for Retention or Rehire?
☒ Yes ☐ No Initials: ________ *(Supervisor)*

Please Explain or Provide Additional Comments Below:

PS Form **1750**, August 1994 **1 - Forward to Designated Postal Official**

Populated from the Enter Ratings Task

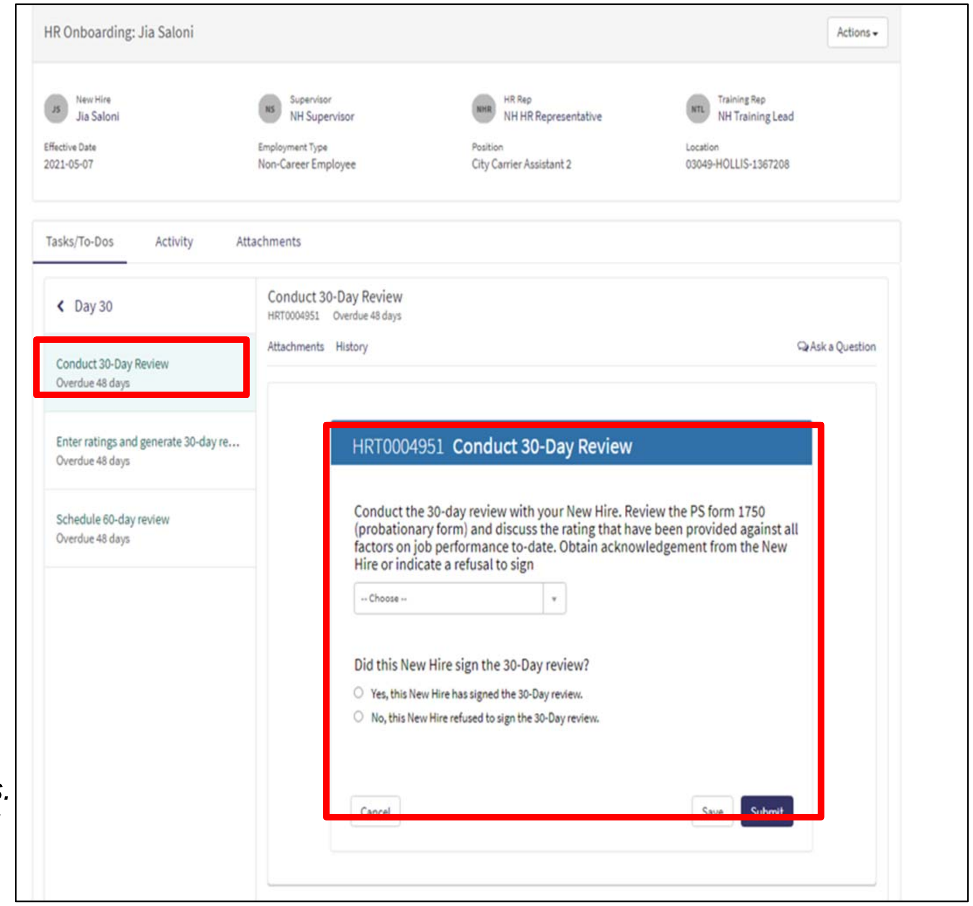
Populated from the New Hire's HR Profile

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 30 Tasks

Conduct Review:

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

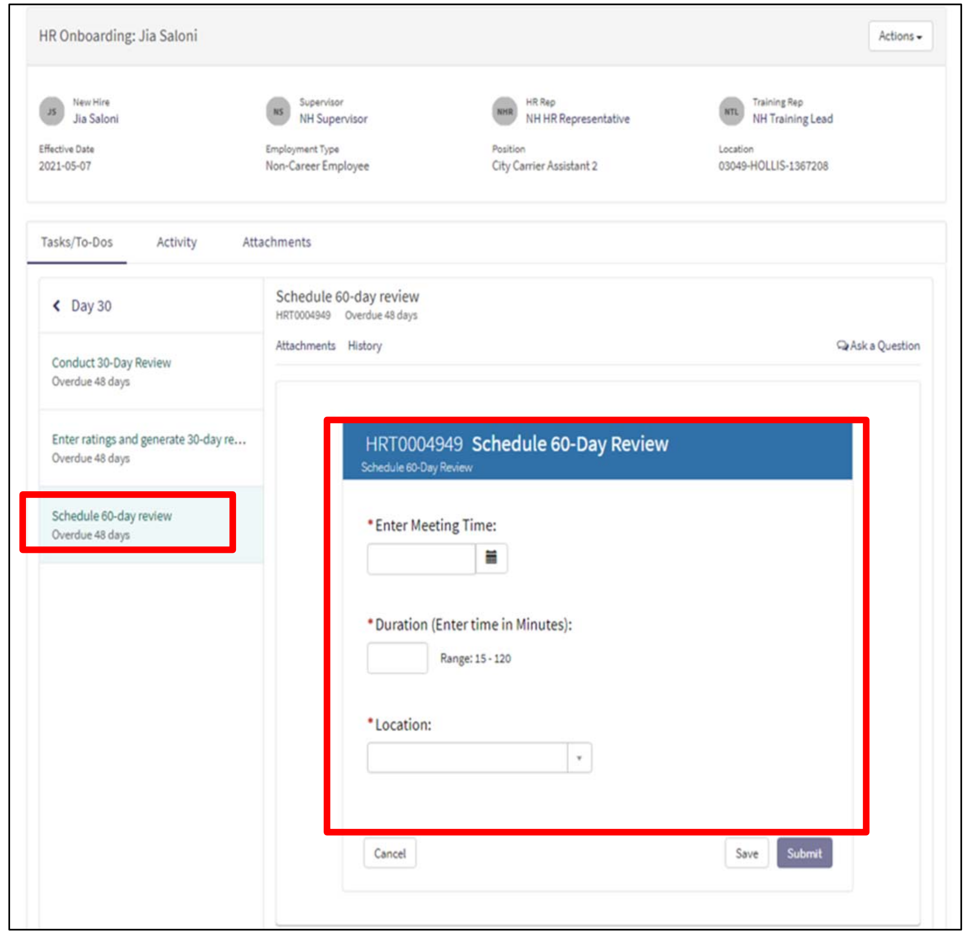


NOTE: *RCAs/ARCs will be excluded from the scheduling and completion of automated PS Form 1750 evaluations at the 30, 60, and 80-Day reviews. They will continue to be evaluated using the same process used today and their reviews will not be captured within the HR Onboarding Pilot tool.*

Workflow – Day 30 Tasks

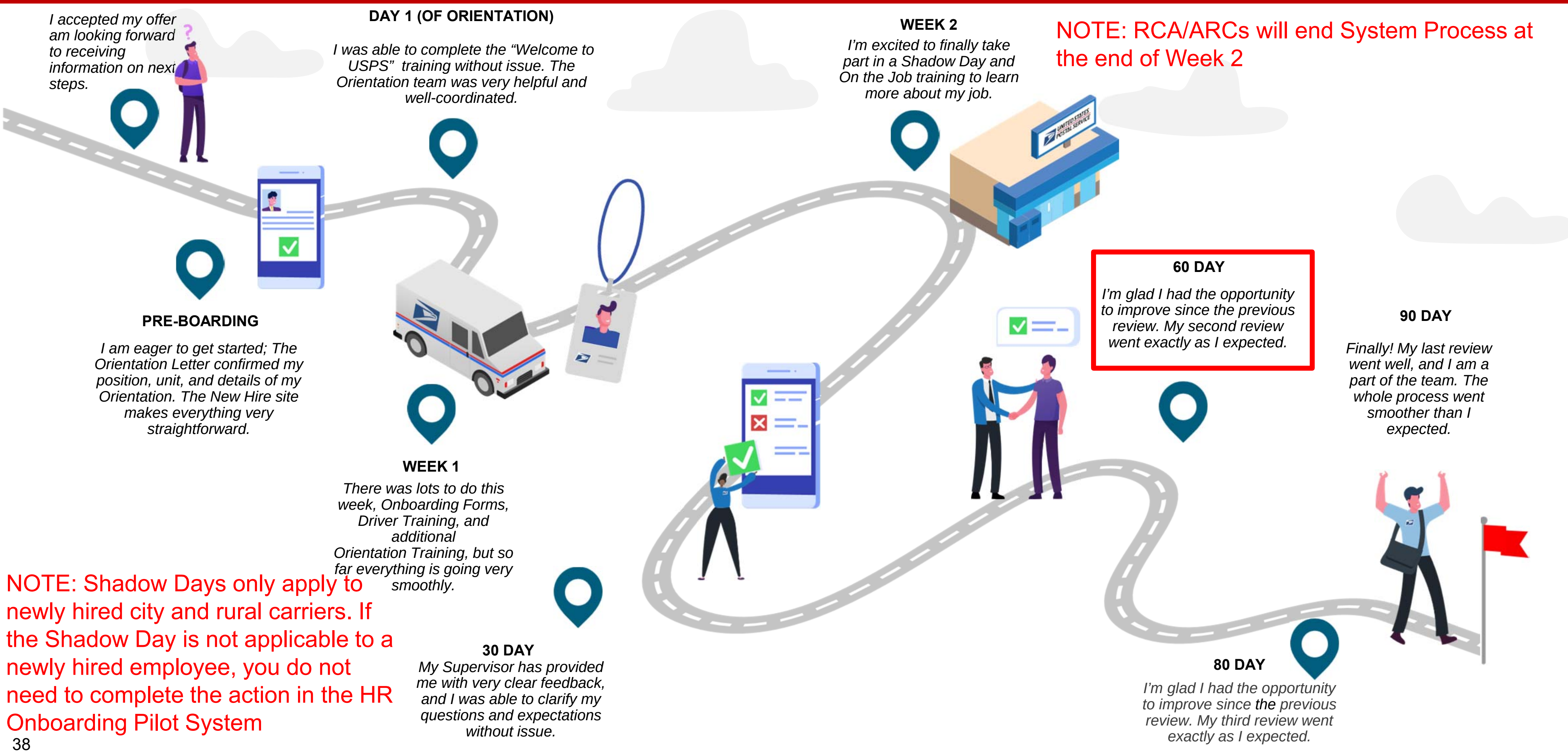
Schedule 60-Day Review:

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.*

Project Overview - USPS HR Onboarding Pilot Journey Map

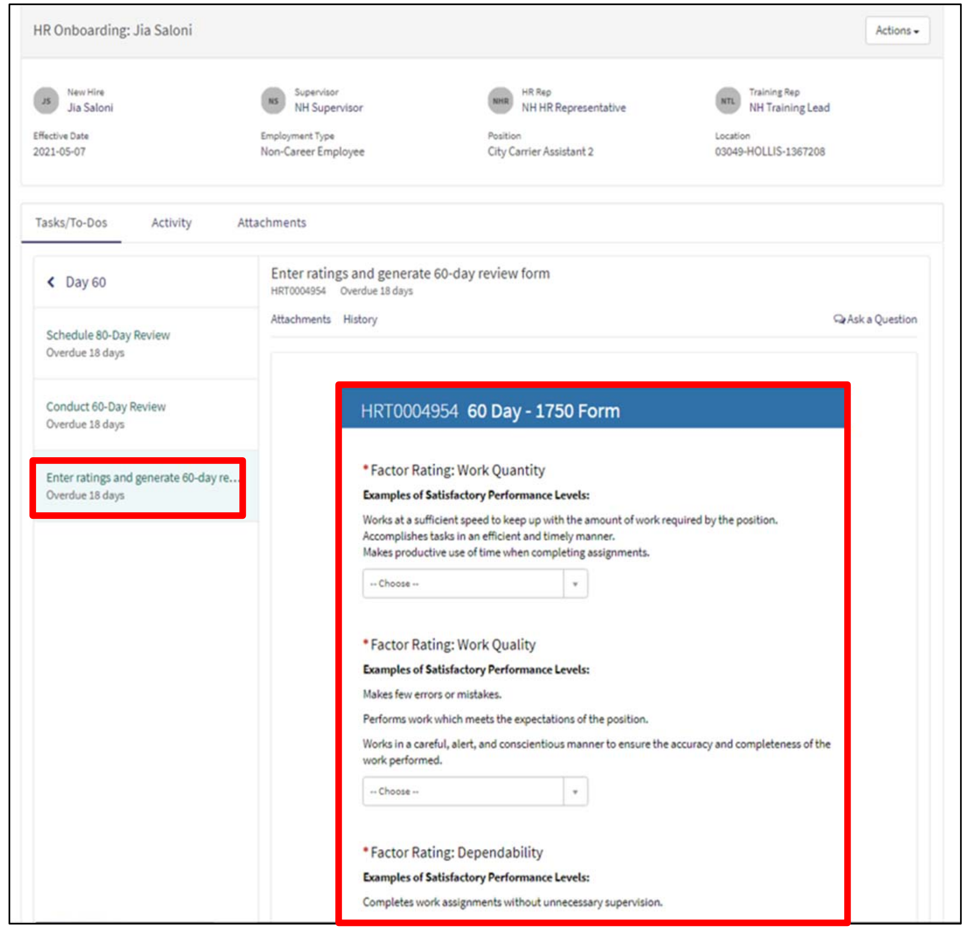


NOTE: RCA/ARCs will end System Process at the end of Week 2

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

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.*

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)* Jia Saloni		2. Employee Social Security Number 061359902	
3. Title City Carrier Assistant 2	4. Pay Location 123	5. Appointment Date 2021-05-07	6. Date Probationary Period Ends 2021-08-05
7a. Complete 30-Day Report By: 2021-06-05	8a. Complete 60-Day Report By: 2021-07-05	9a. Complete 80-Day Report By: 2021-07-25	10a. Complete Year End Report By: 2022-05-06
7b. Enter Factor Rating (O, S, U, NO) A O B O C S D O E S F S	8b. Enter Factor Rating (O, S, U, NO) A S B O C S D O E O F O	9b. Enter Factor Rating (O, S, U, NO) A __ B __ C __ D __ E __ F __	10b. Enter Factor Rating (O, S, U, NO) A __ B __ C __ D __ E __ F __
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)*	

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)*.

O = OUTSTANDING S = SATISFACTORY U = UNACCEPTABLE NO = NOT OBSERVED

Factor	Examples of Satisfactory Performance Levels
A. Work Quantity	■ 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.
B. Work Quality	■ 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.
C. Dependability	■ Completes work assignments without unnecessary supervision. ■ Takes responsibility for completing his/her own work. ■ Reports to work on time. ■ Demonstrates satisfactory attendence.
D. Work Relations	■ Maintains positive working relationships with others. ■ Works harmoniously with others in getting the work done. ■ Cooperates well with co-workers, supervisors, and others with whom he/she comes into contact.
E. Work Methods	■ Handles equipment and/or work materials in an appropriate manner. ■ Consistently observes proper safety rules and practices. ■ Understands and follows oral and/or written instructions.
F. Personal Conduct	■ Conducts himself/herself in a manner appropriate to the work setting. ■ Maintains an appropriate appearance for the position. ■ Demonstrates a positive approach toward work, co-workers, and supervisors. ■ Demonstrates a willingness to handle all assignments. ■ Demonstrates flexibility in moving from one task to another as needed.

Have Expectations Been Jointly Discussed?
☒ Yes ☐ No Initials: *(Supervisor)* *(Employee)*

Would You Recommend This Person for Retention or Rehire?
☒ Yes ☐ No Initials: *(Supervisor)*

Please Explain or Provide Additional Comments Below:

PS Form **1750**, August 1994 **1 - Forward to Designated Postal Official**

Populated from the Enter Ratings Task

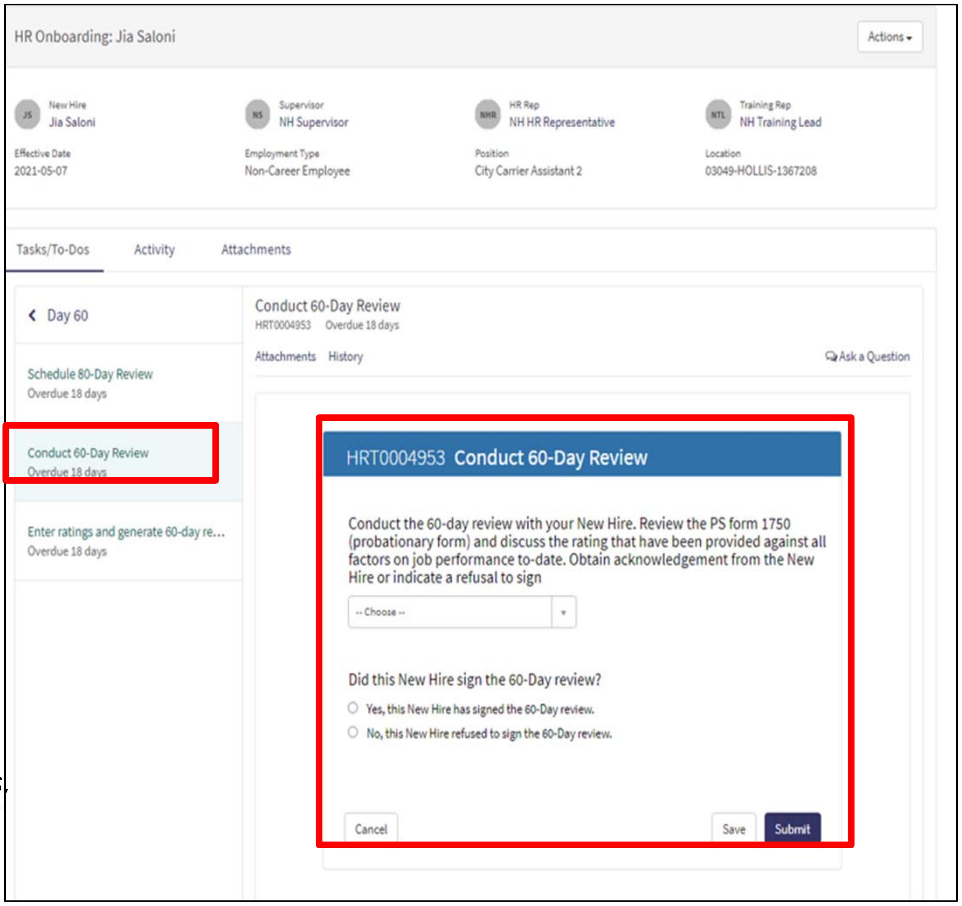
Populated from the New Hire's HR Profile

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.

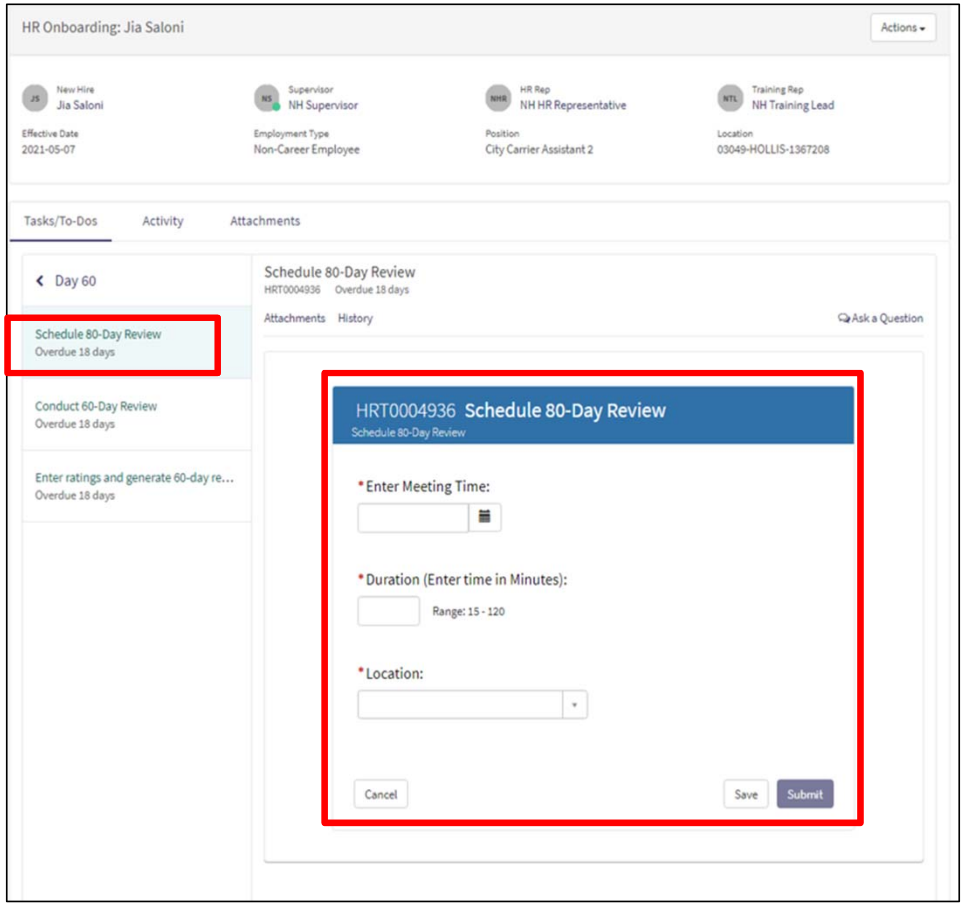


NOTE: *RCAs/ARCs will be excluded from the scheduling and completion of automated PS Form 1750 evaluations at the 30, 60, and 80-Day reviews. They will continue to be evaluated using the same process used today and their reviews will not be captured within the HR Onboarding Pilot tool.*

Workflow – Day 60 Tasks

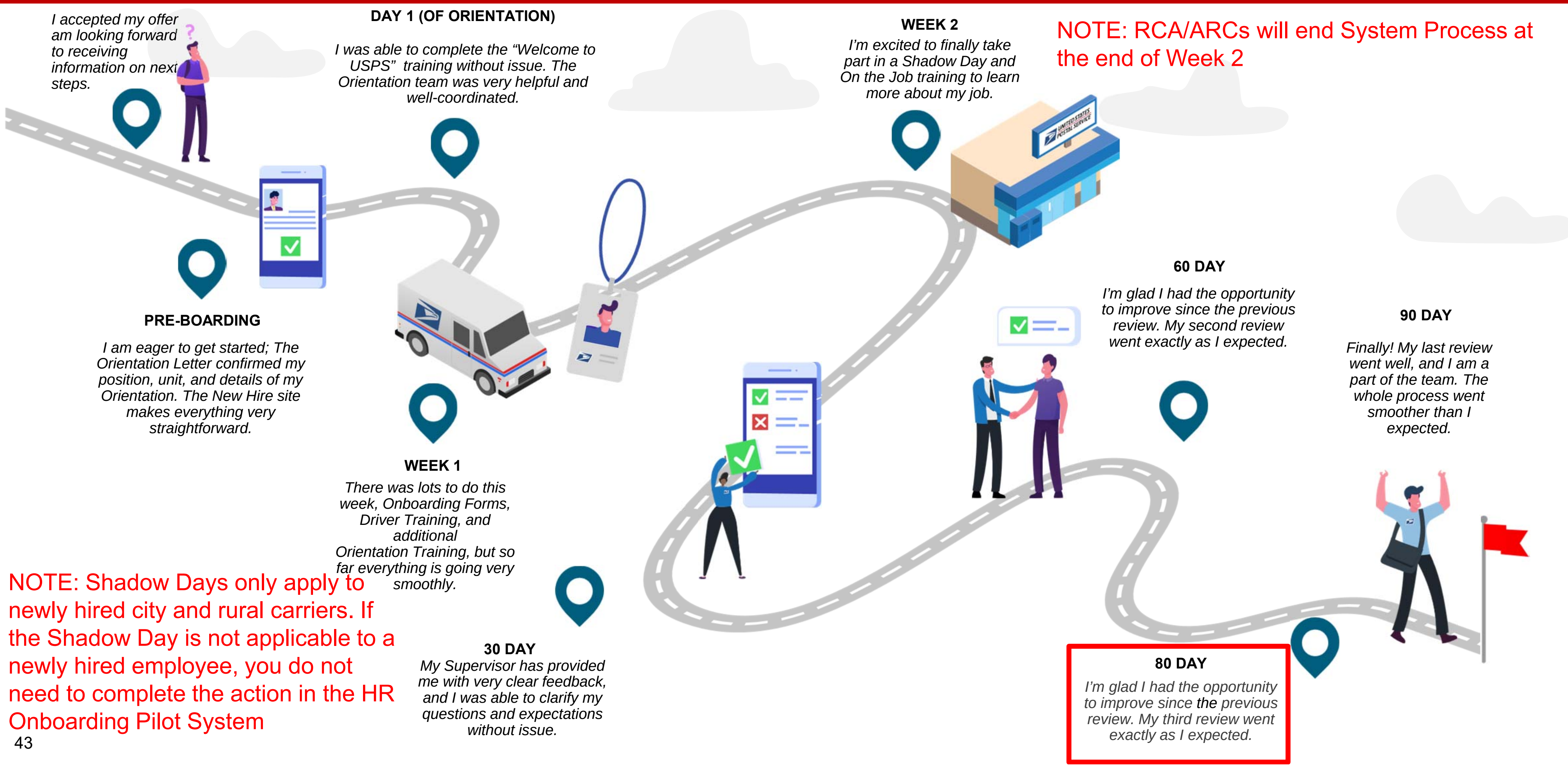
Schedule 80-Day Review:

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.*

Project Overview - USPS HR Onboarding Pilot Journey Map



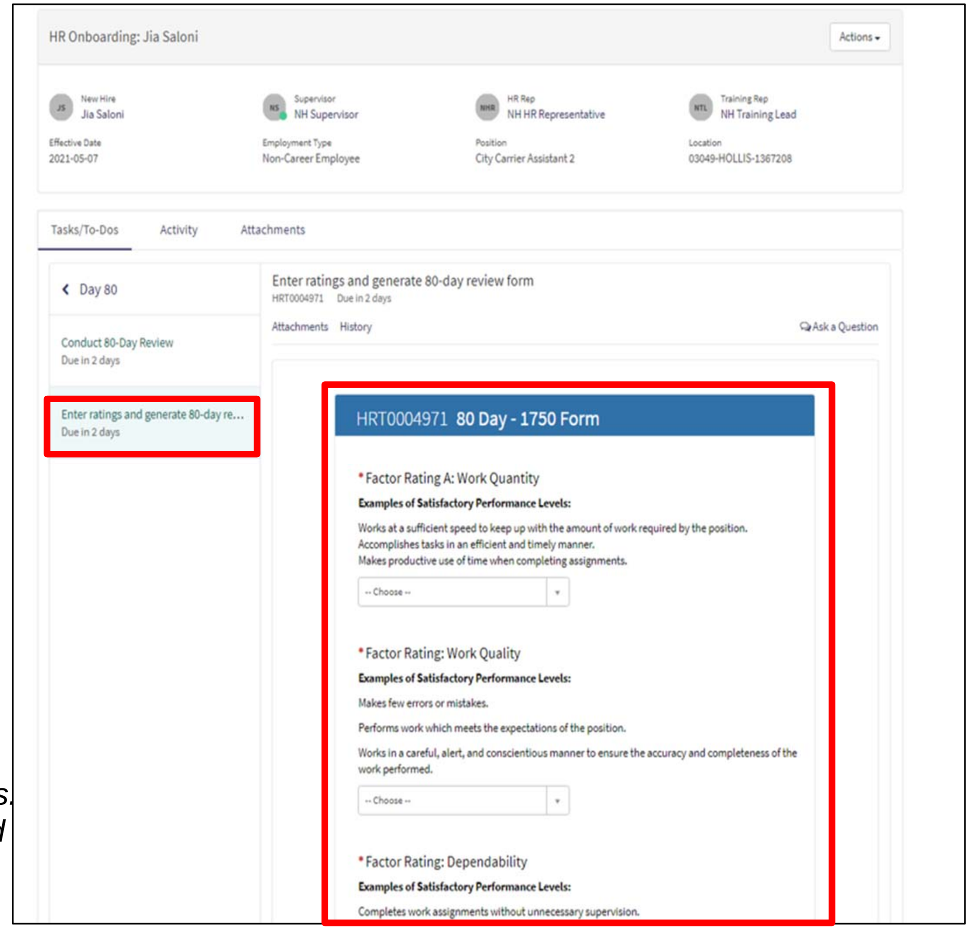
NOTE: RCA/ARCs will end System Process at the end of Week 2

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.*

Workflow – Day 80 Tasks

UNITED STATES POSTAL SERVICE

Employee Evaluation and/or Probationary Report
(See Instructions on Reverse)

1. Employee's Name *(First, MI, Last)*			2. Employee Social Security Number	
Jia Saloni			061359902	
3. Title		4. Pay Location	5. Appointment Date	6. Date Probationary Period Ends
City Carrier Assistant 2		123	2021-05-07	2021-08-05

7a. Complete 30-Day Report By:	8a. Complete 60-Day Report By:	9a. Complete 80-Day Report By:	10a. Complete Year End Report By:
2021-06-05	2021-07-05	2021-07-25	2022-05-06
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 O B O C S D O E S F S	A S B O C S D O E O F O	A O B O C O D S E O F O	A __ B __ C __ D __ E __ F __
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 P... d or Year End)*	12. Employee's Signature and Date *(Does Not Indicate Agreement)*

Listed below are the fact... which you are to evaluate the employee. Next to each factor are examples of behaviors that would describe performance at the S...CTORY level. These are provided as reference points for evaluating performance. Performance substantially above the performance ... at the *SATISFACTORY* level would be rated *OUTSTANDING*, while performance substantially below the *SATISFACTORY* level would ... *UNACCEPTABLE*. Please indicate your rating of *OUTSTANDING, SATISFACTORY*, or *UNACCEPTABLE* for each factor by entering ...ate 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 ... is not relevant to the position which you are rating, enter "NO" *(NOT OBSERVED)*.

O = *OUTSTANDING*   S = *SATISFACTORY*   U = *UNACCEPTABLE*   NO = *NOT OBSERVED*

Factor	Examples of Satisfactory Performance Levels
A. Work Quantity	■ 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.
B. Work Quality	■ 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.
C. Dependability	■ Completes work assignments without unnecessary supervision. ■ Takes responsibility for completing his/her own work. ■ Reports to work on time. ■ Demonstrates satisfactory attendence.
D. Work Relations	■ Maintains positive working relationships with others. ■ Works harmoniously with others in getting the work done. ■ Cooperates well with co-workers, supervisors, and others with whom he/she comes into contact.
E. Work Methods	■ Handles equipment and/or work materials in an appropriate manner. ■ Consistently observes proper safety rules and practices. ■ Understands and follows oral and/or written instructions.
F. Personal Conduct	■ Conducts himself/herself in a manner appropriate to the work setting. ■ Maintains an appropriate appearance for the position. ■ Demonstrates a positive approach toward work, co-workers, and supervisors. ■ Demonstrates a willingness to handle all assignments. ■ Demonstrates flexibility in moving from one task to another as needed.

Have Expectations Been Jointly Discussed?
☒ Yes ☐ No   Initials: ______ *(Supervisor)* ______ *(Employee)*

Would You Recommend This Person for Retention or Rehire?
☒ Yes ☐ No   Initials: ______ *(Supervisor)*

Please Explain or Provide Additional Comments Below:

PS Form **1750**, August 1994   **1 - Forward to Designated Postal Official**

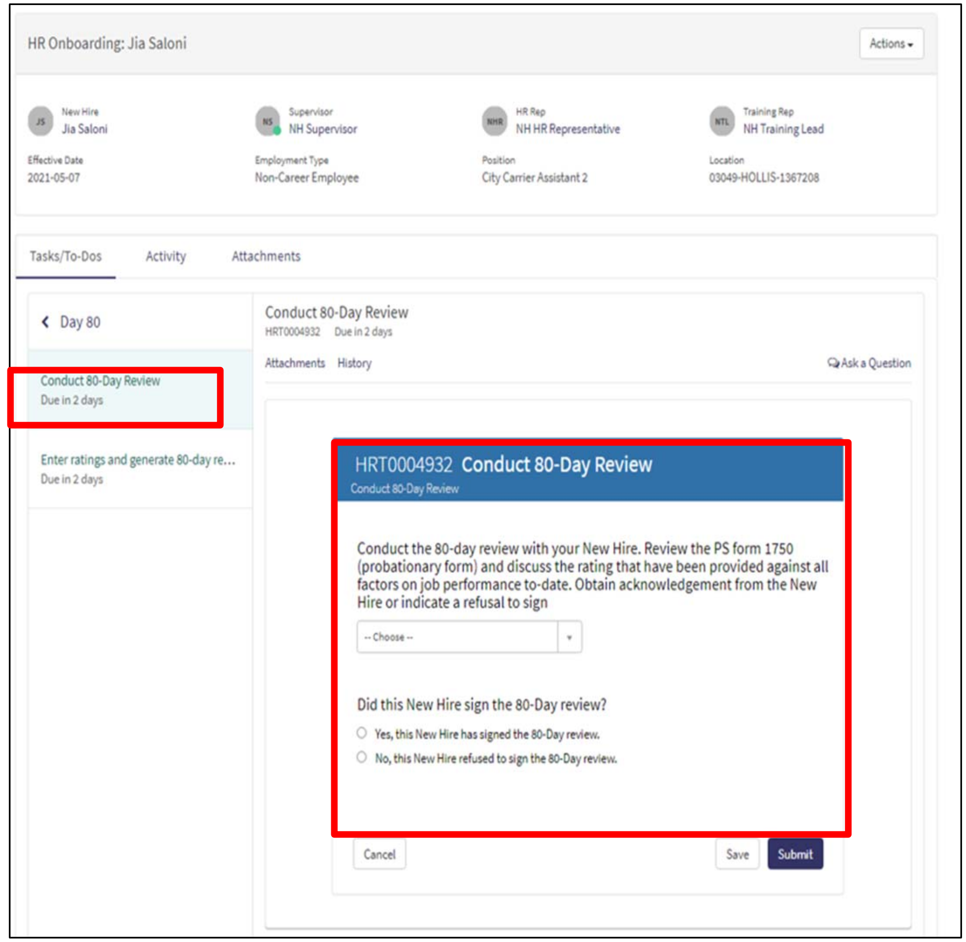
Populated from the Enter Ratings Task

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.*

Conduct Review:

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

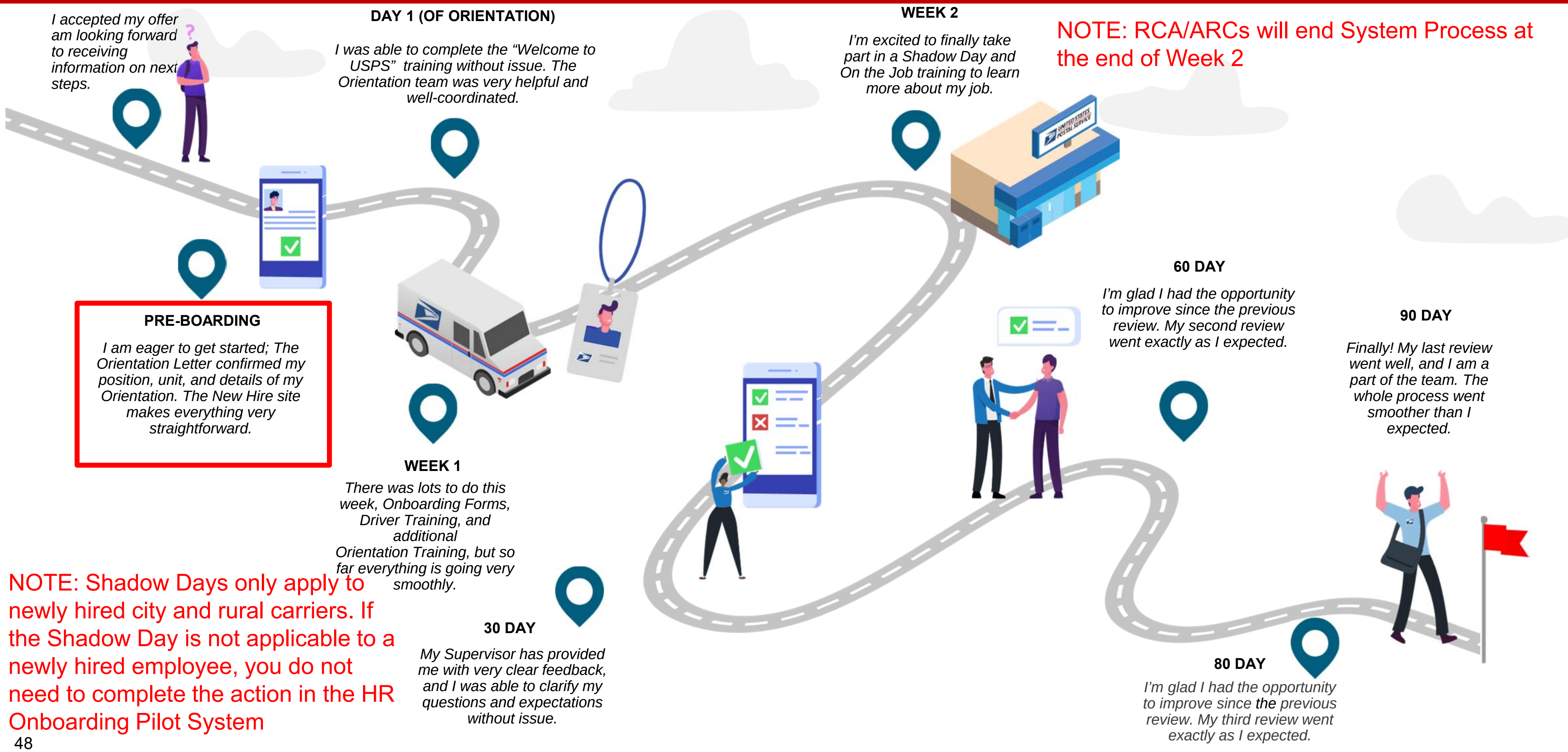


***NOTE:** RCAs/ARCs will be excluded from the scheduling and completion of automated PS Form 1750 evaluations at the 30, 60, and 80-Day reviews. They will continue to be evaluated using the same process used today and their reviews will not be captured within the HR Onboarding Pilot tool.*

Module 4

Workflow - Trainer Tasks

Project Overview - USPS HR Onboarding Pilot Journey Map



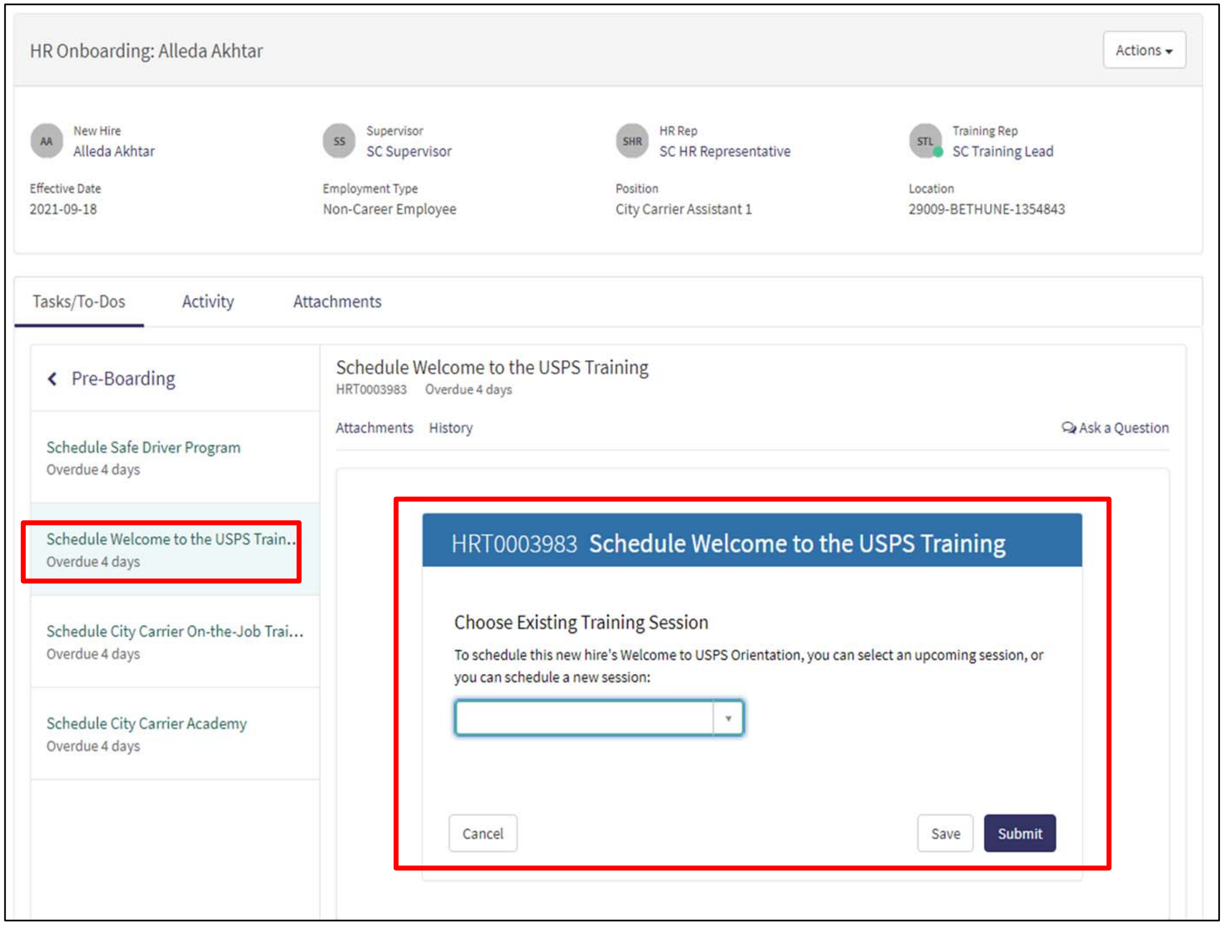
NOTE: RCA/ARCs will end System Process at the end of Week 2

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

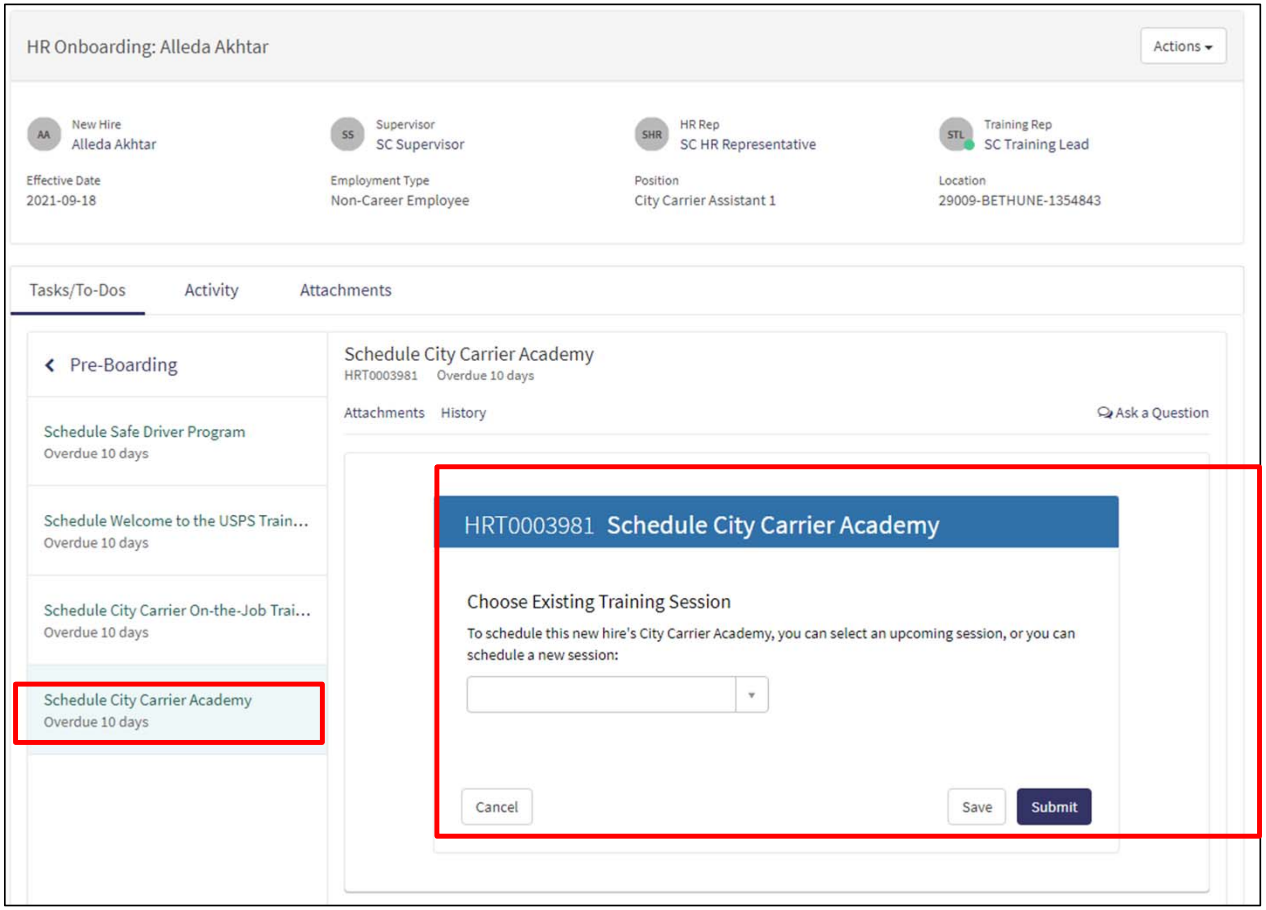
Schedule New Hire for Welcome to USPS Orientation (if applicable):

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



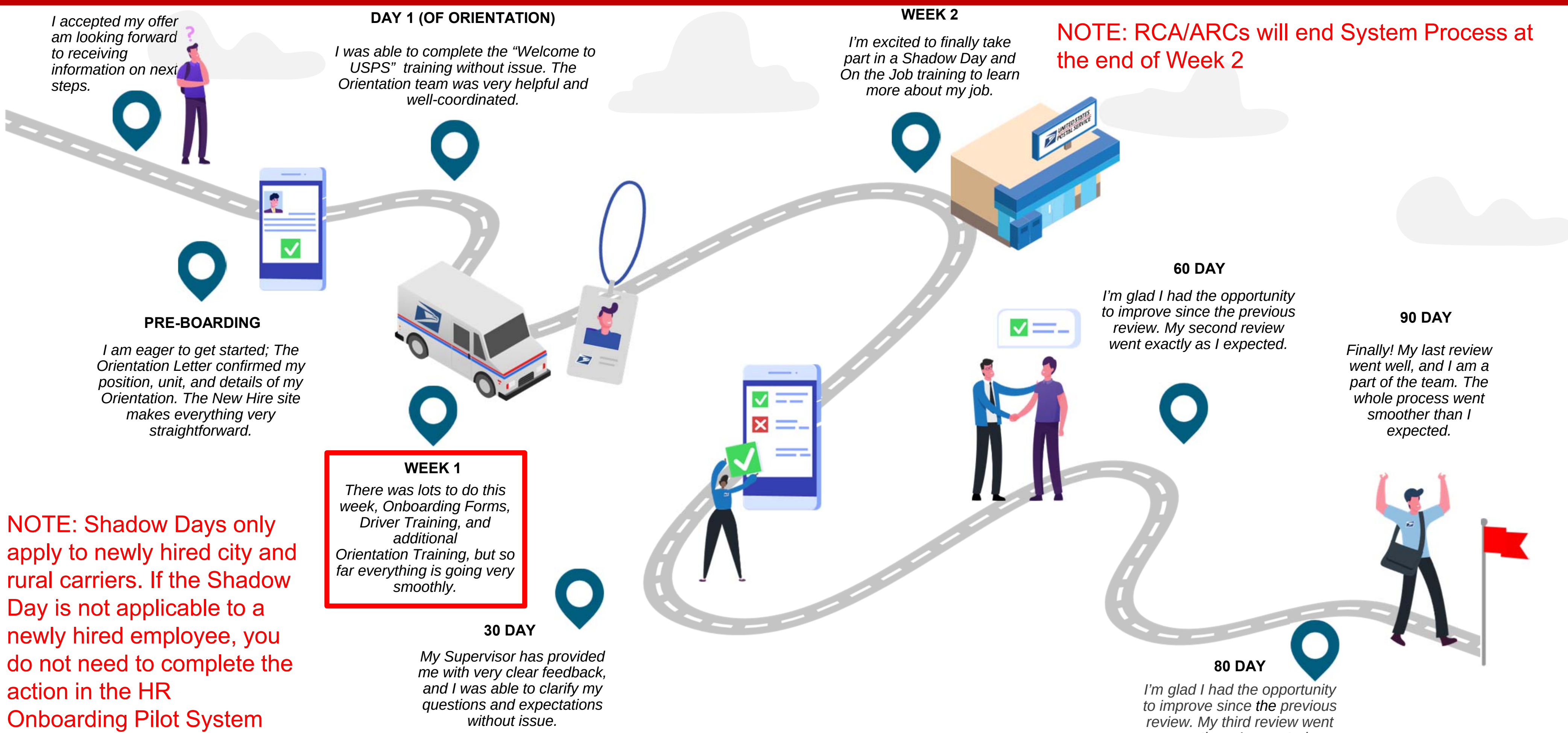
Schedule New Hire ___ Training:

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



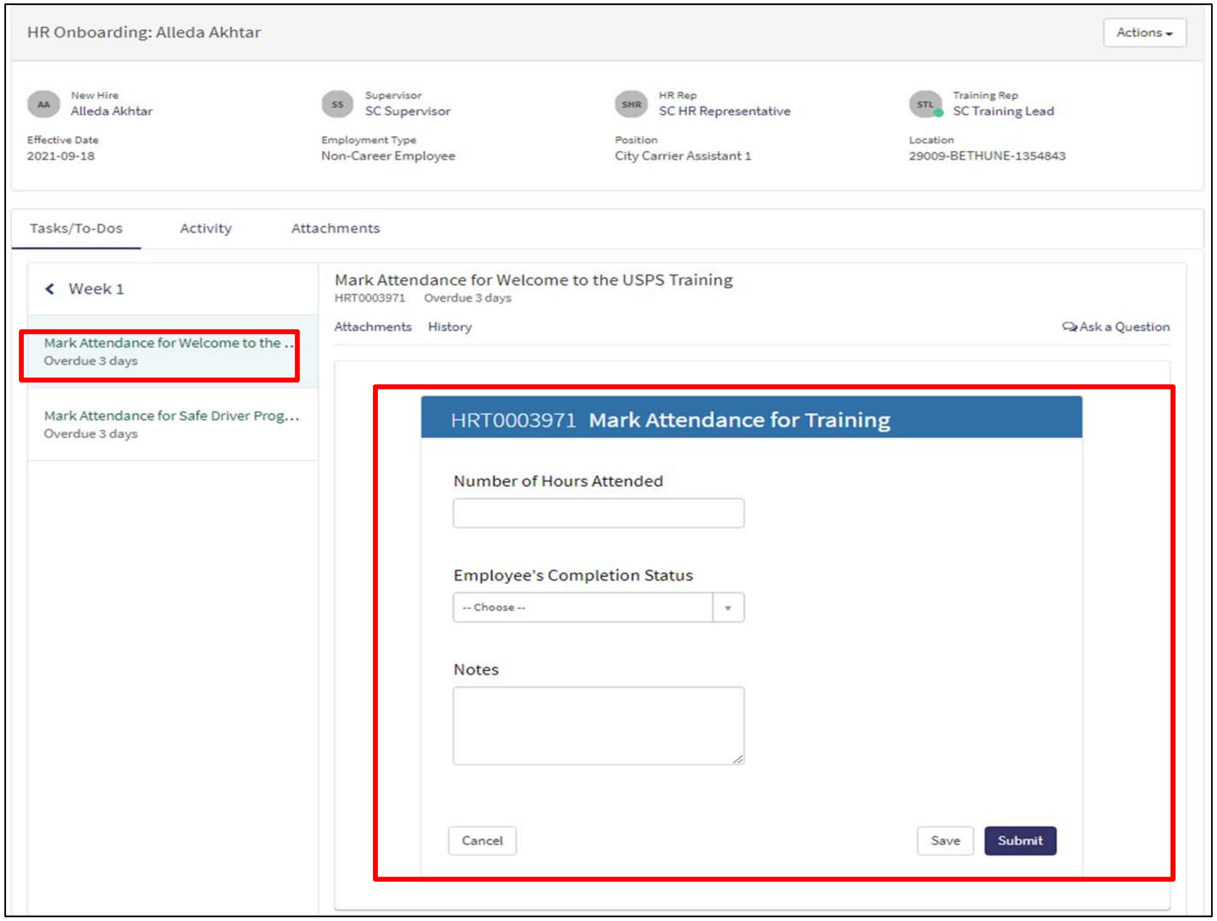
***NOTE**: Depending on the New Hire's occupation code and training plan, this may include more than one task.*

Project Overview - USPS HR Onboarding Pilot Journey Map



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.

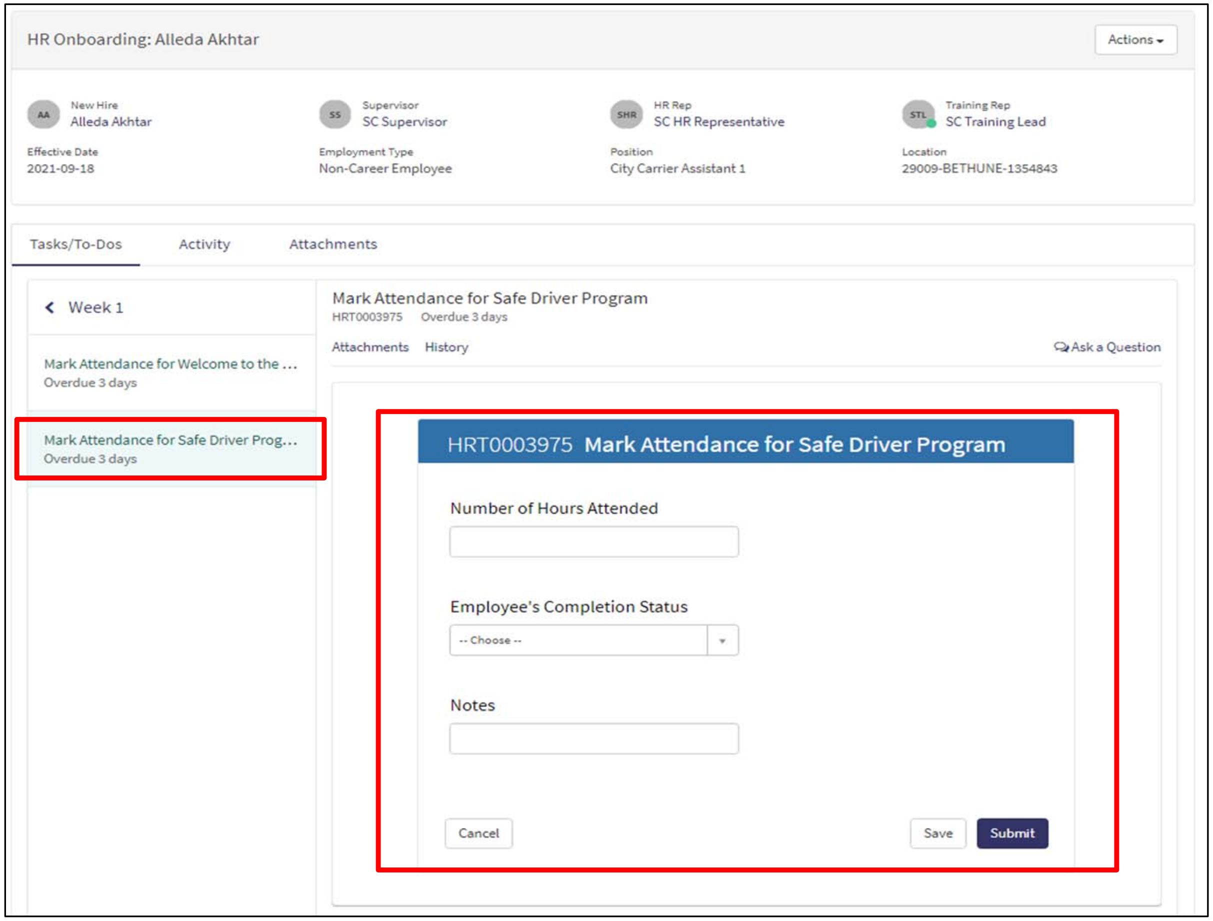


***NOTE**: Depending on the New Hire's occupation code and training plan, this may include more than one task.*

Workflow – Week 1 Tasks

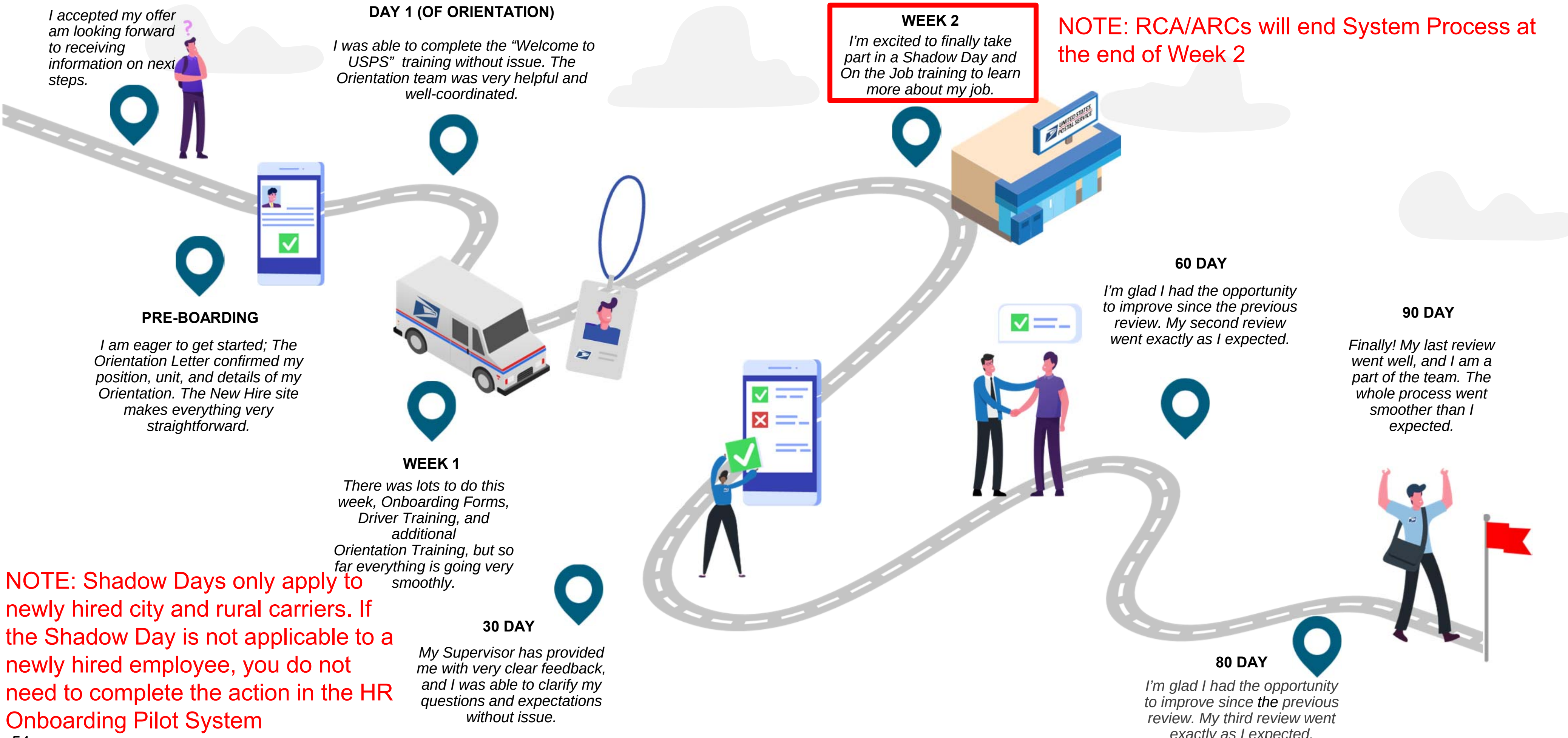
Mark Attendance for ___ Training:

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



__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

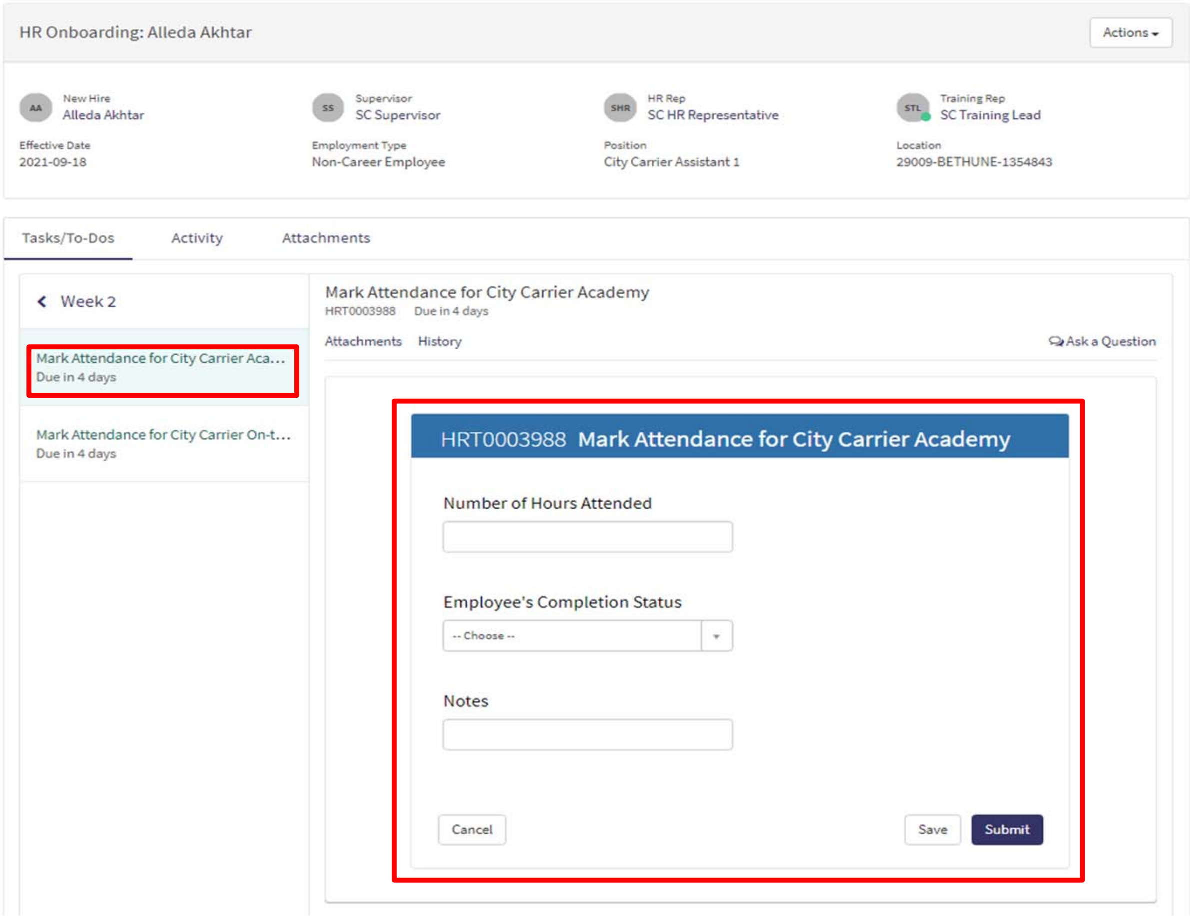


NOTE: RCA/ARCs will end System Process at the end of Week 2

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

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).



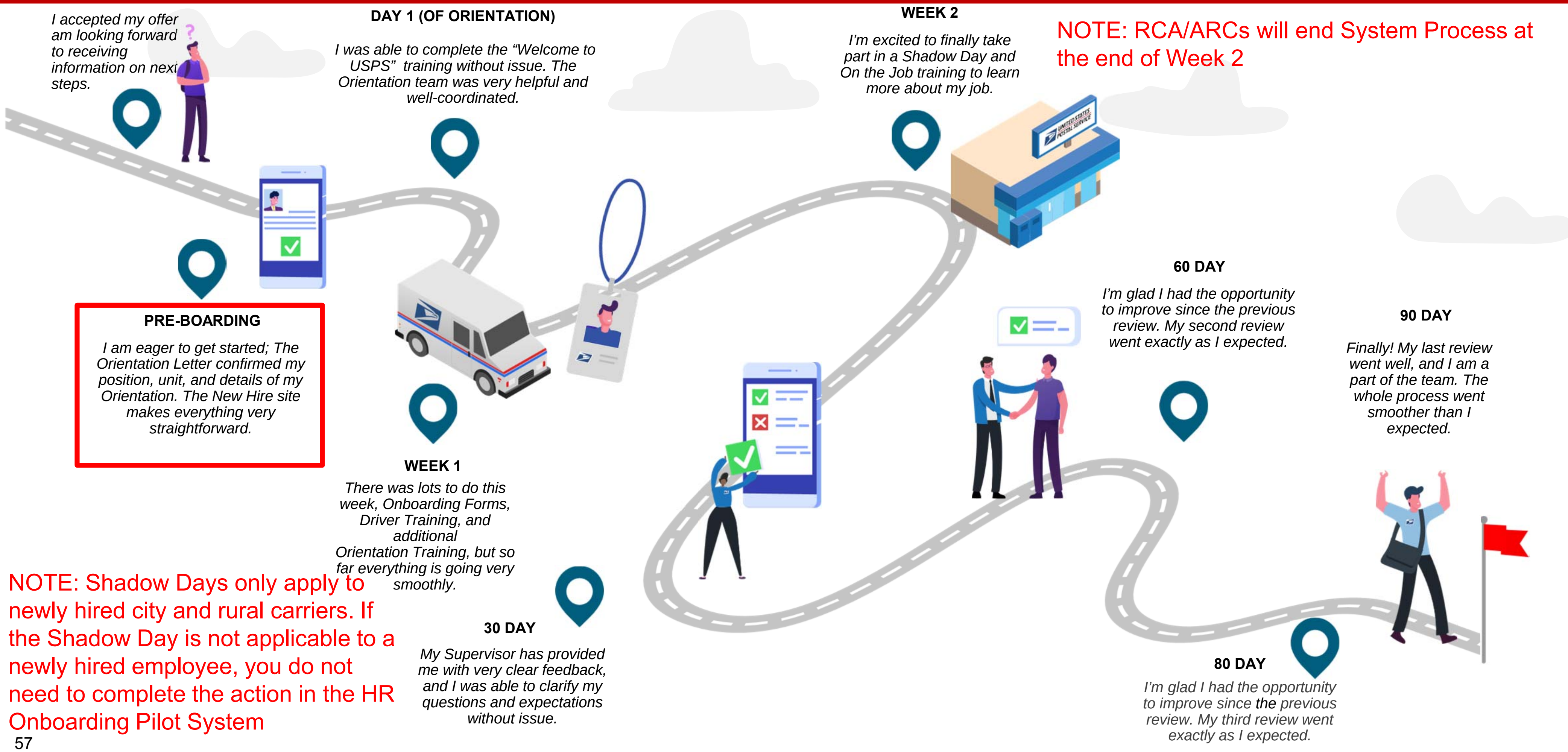
***NOTE**: Depending on the New Hire's occupation code and training plan, this may include more than one task.*

Module 5

Workflow - HR Representative Tasks

Project Overview - USPS HR Onboarding Pilot Journey Map

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

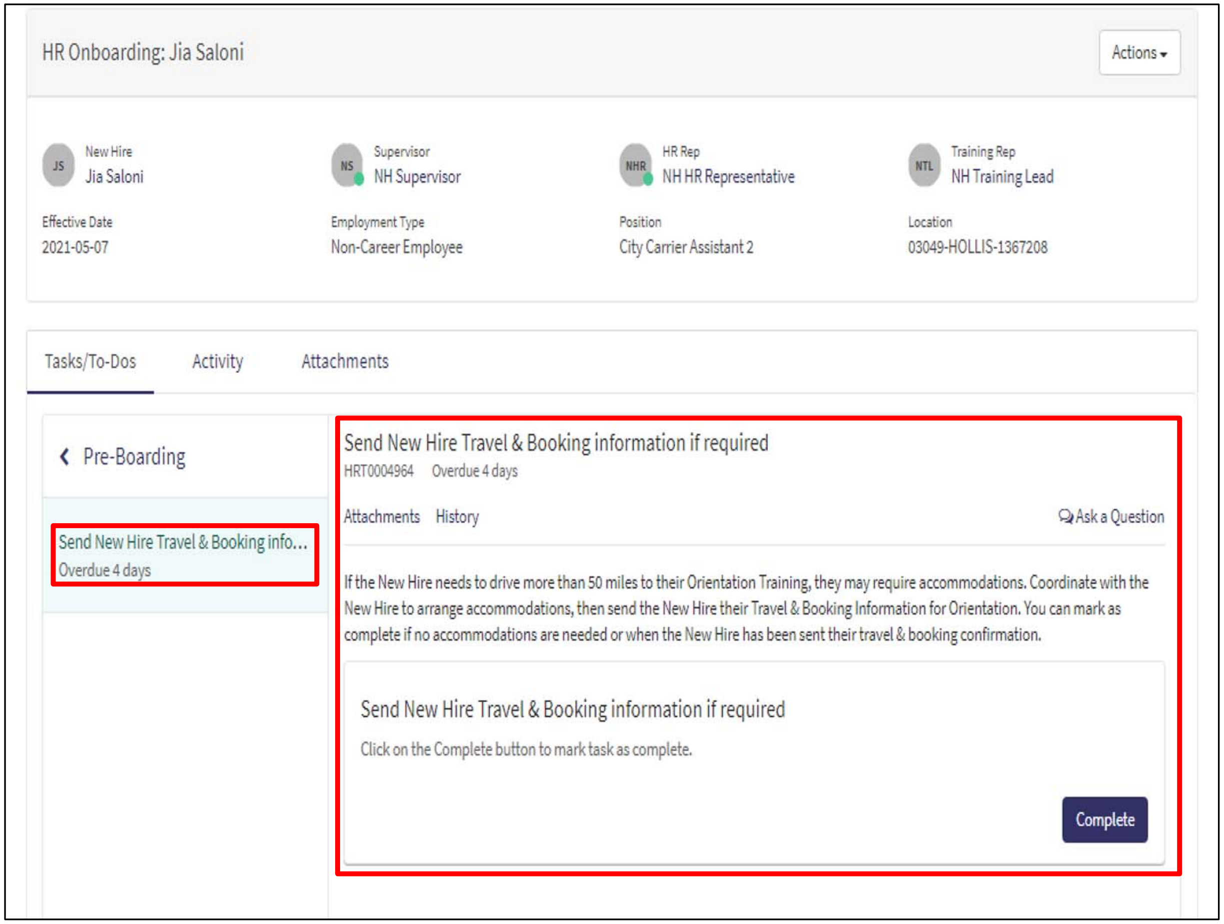


NOTE: Shadow Days only apply to newly hired city and rural carriers. If the Shadow Day is not applicable to a newly hired employee, you do not need to complete the action in the HR Onboarding Pilot System

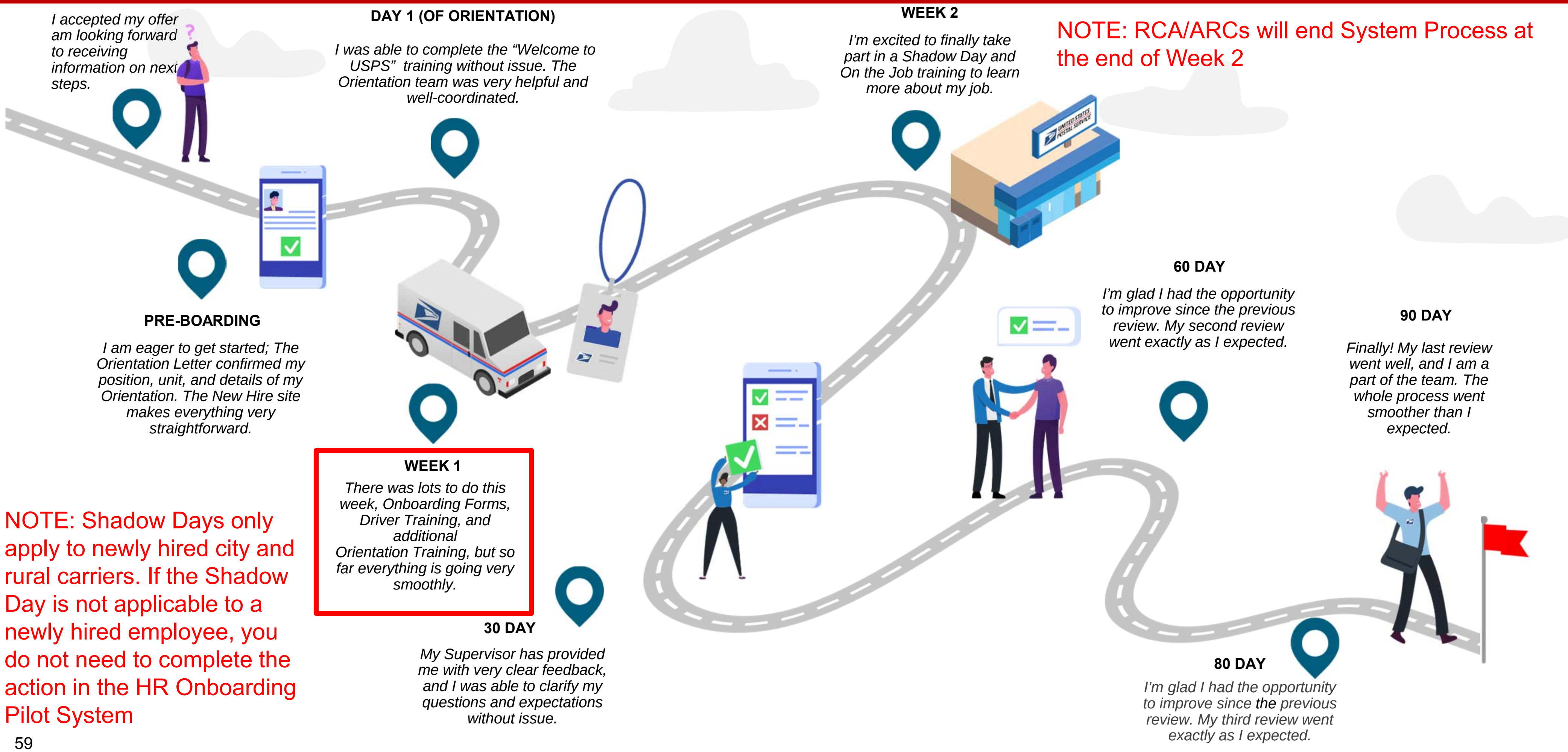
Workflow – Pre-Boarding Tasks

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.



Project Overview - USPS HR Onboarding Pilot Journey Map



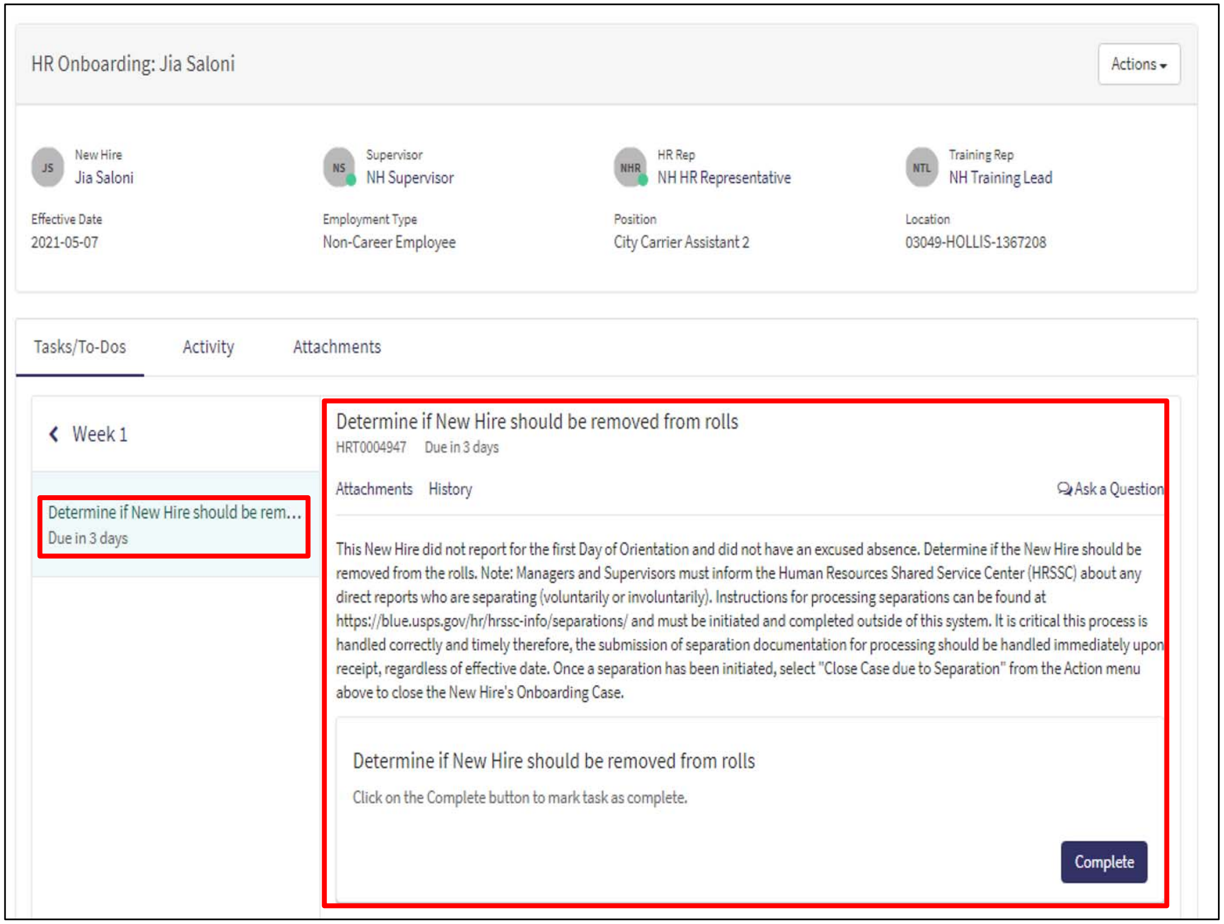
NOTE: RCA/ARCs will end System Process at the end of Week 2

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.



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.

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.

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.

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

30 DAY

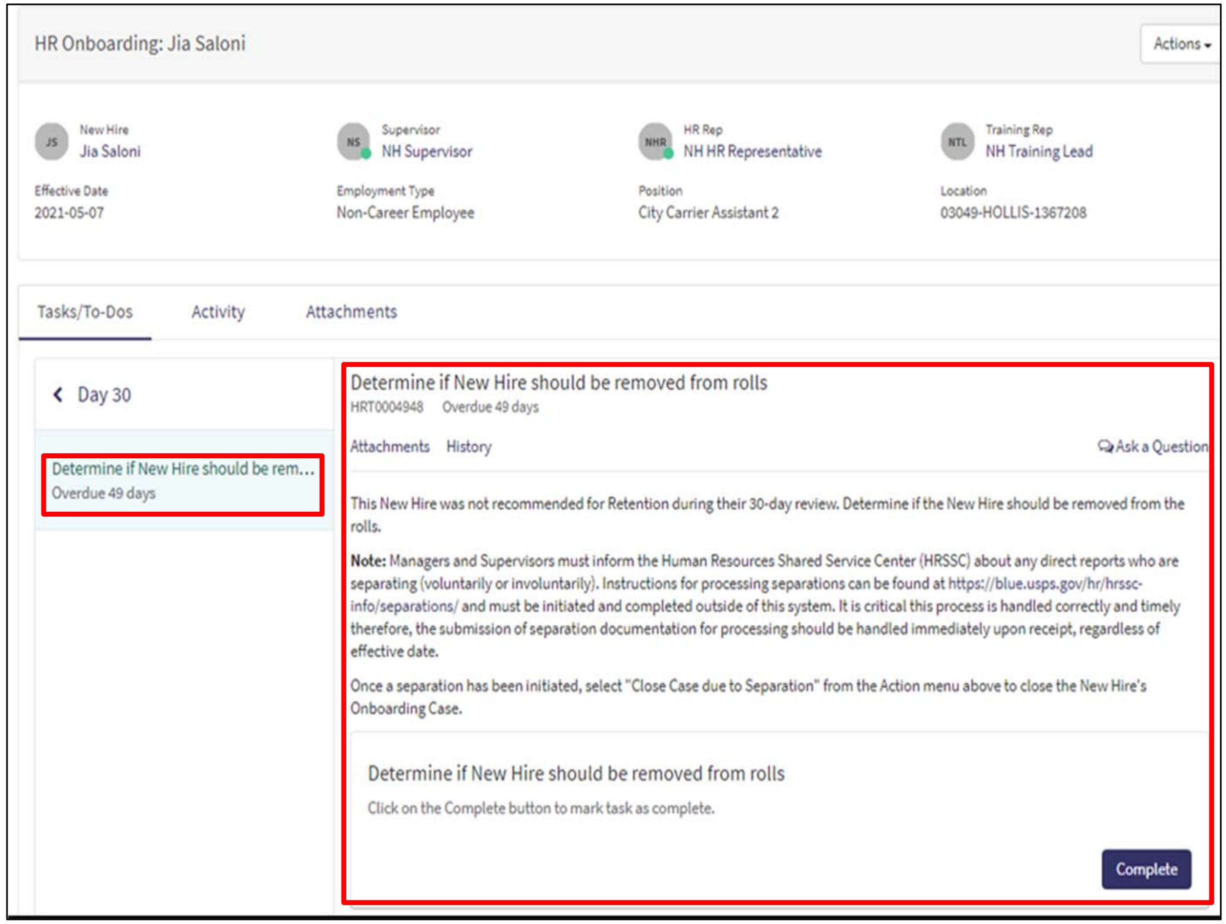
My Supervisor has provided me with very clear feedback, and I was able to clarify my questions and expectations without issue.

80 DAY

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

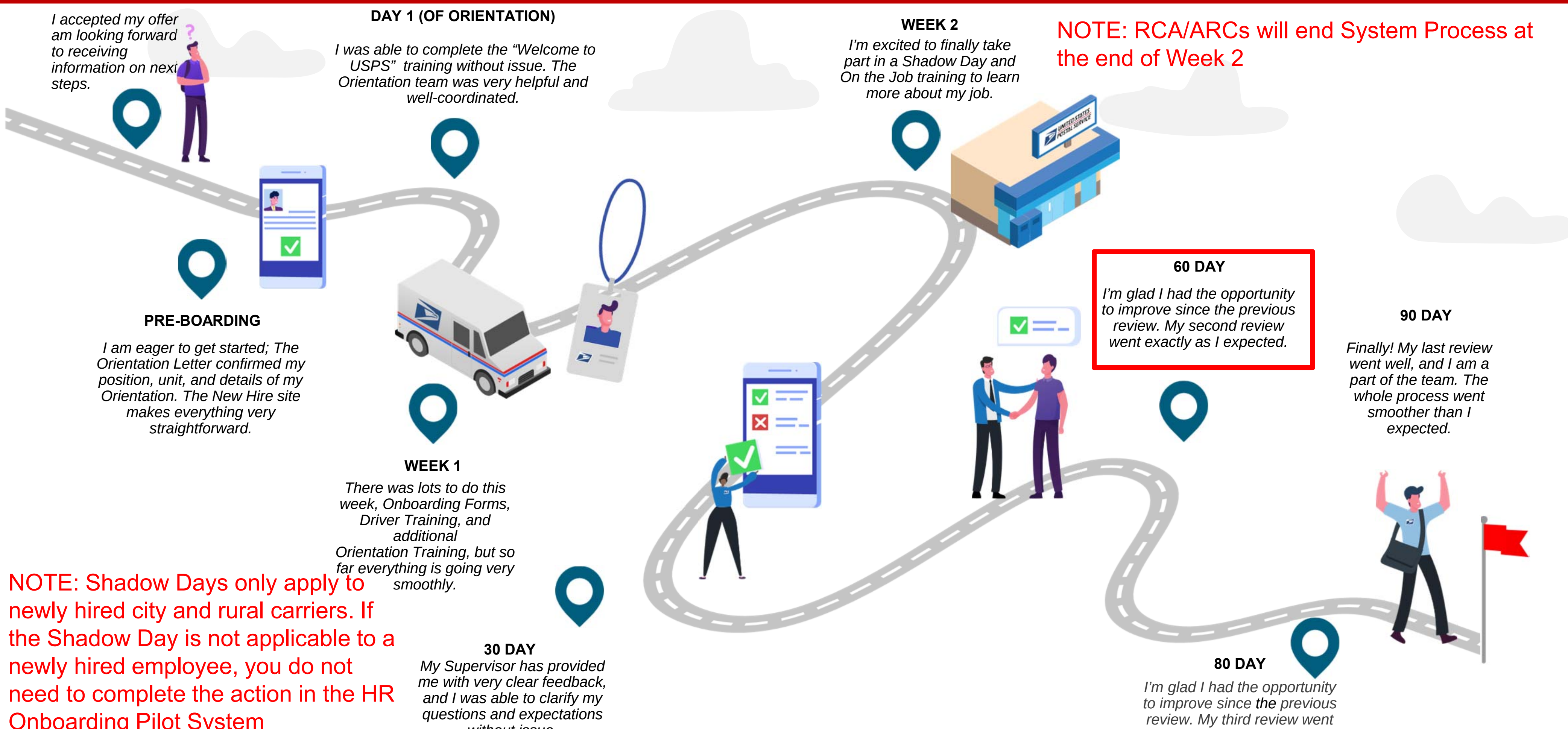
Determine if New Hire should be removed from rolls:

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.*

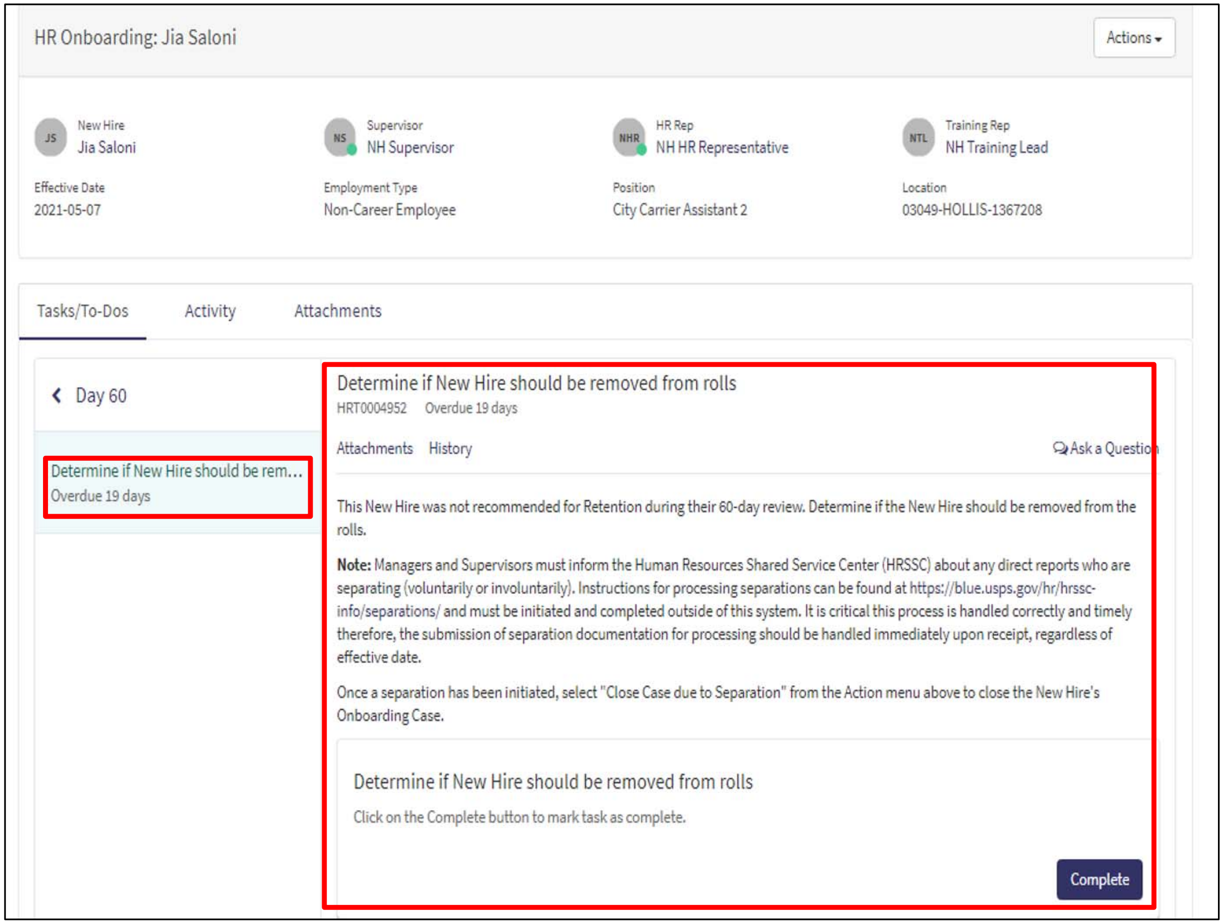
Project Overview - USPS HR Onboarding Pilot Journey Map



Workflow – Day 60 Tasks

Determine if New Hire should be removed from rolls:

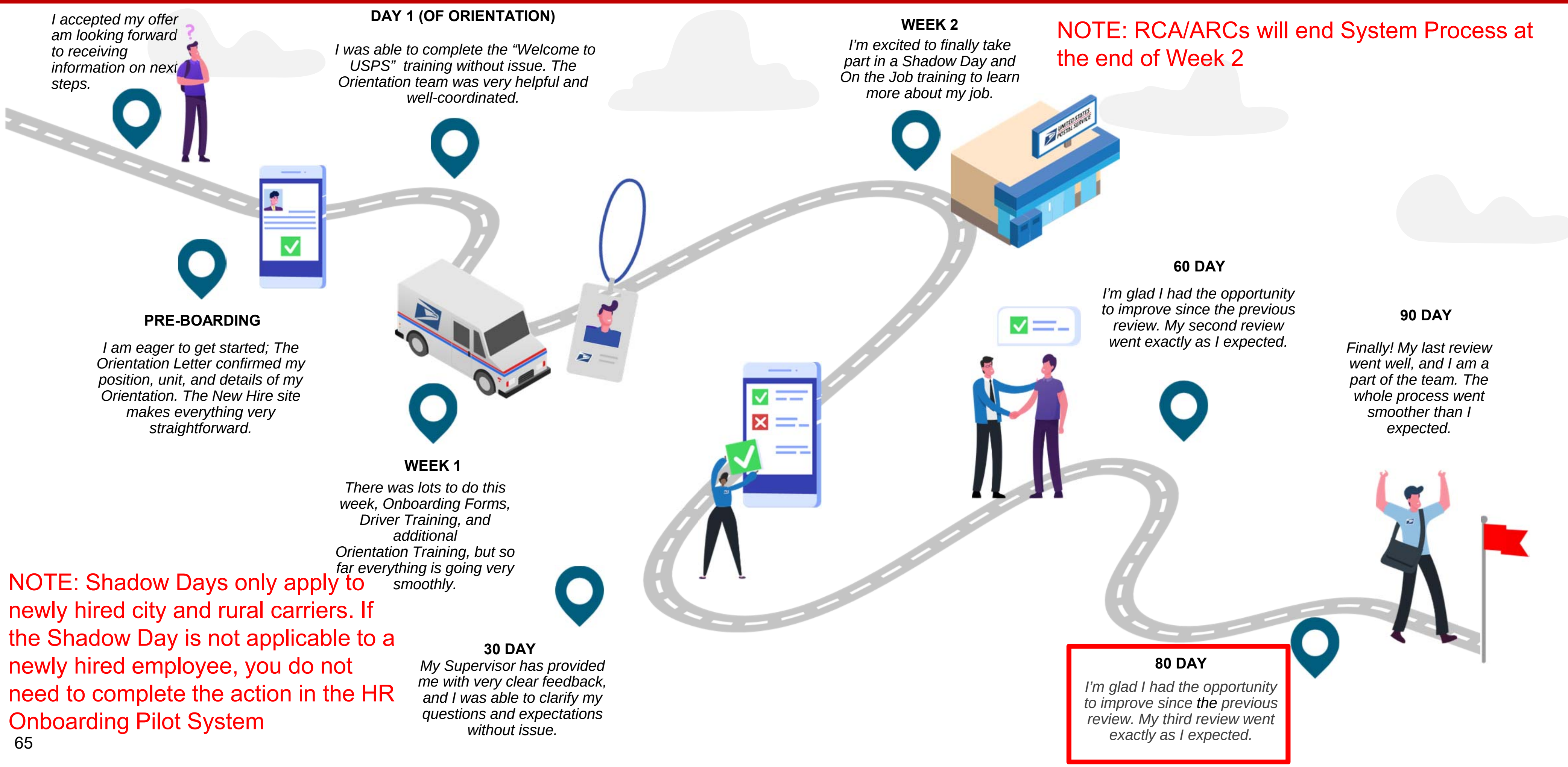
HR Representatives will use this task as a reminder to verify the continued employment of the New Hire and take any “outside-the-system” actions necessary if the New Hire separates from USPS.



***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.*

Project Overview - USPS HR Onboarding Pilot Journey Map

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

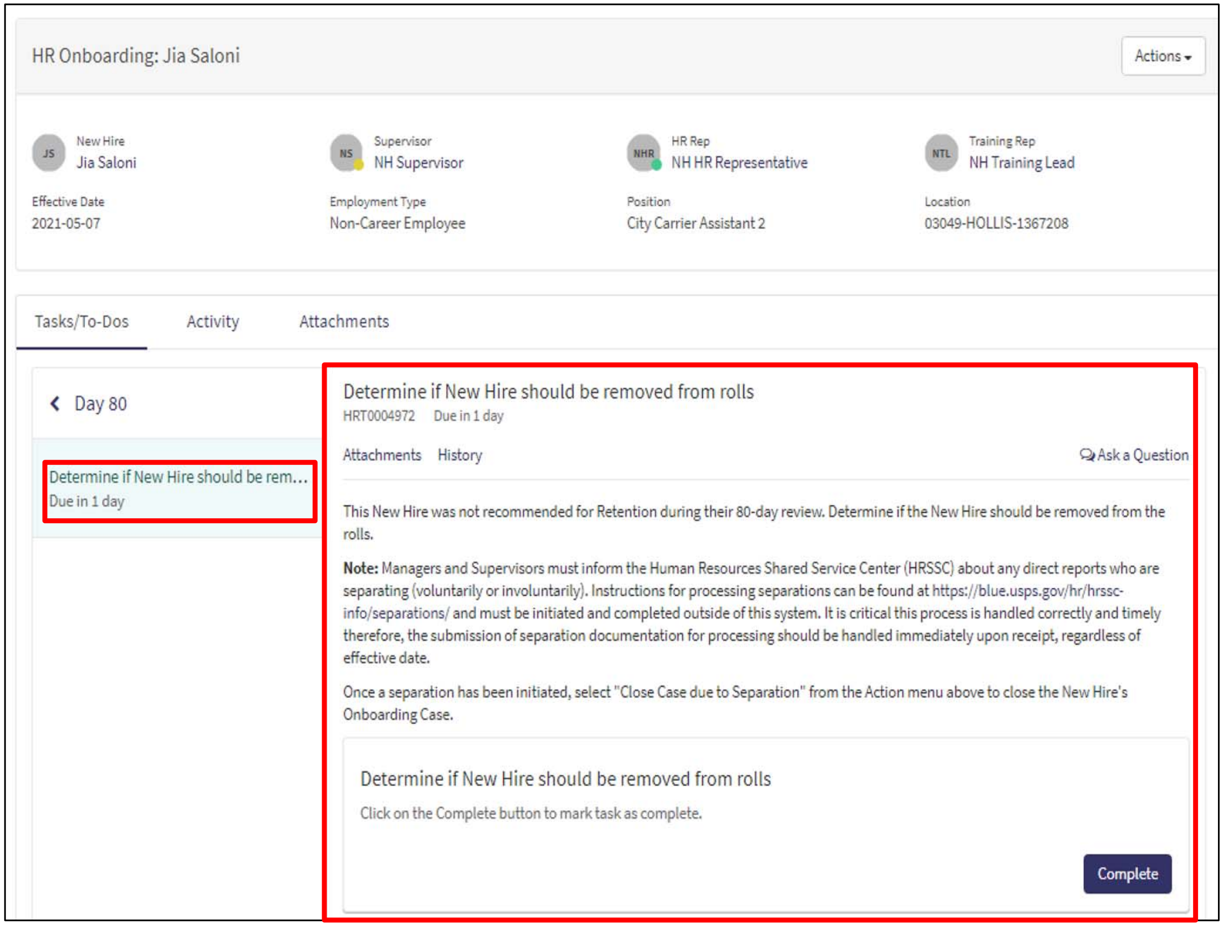


NOTE: Shadow Days only apply to newly hired city and rural carriers. If the Shadow Day is not applicable to a newly hired employee, you do not need to complete the action in the HR Onboarding Pilot System

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.

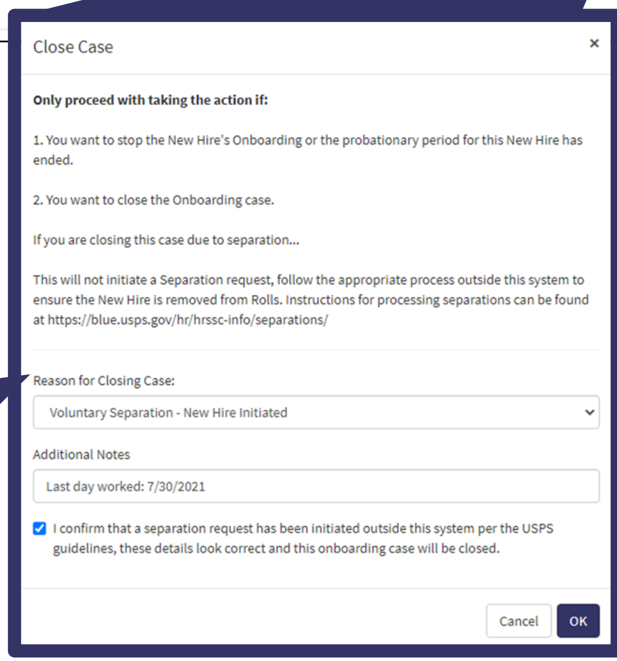


NOTE: *RCAs/ARCs will be excluded from the scheduling and completion of automated PS Form 1750 evaluations at the 30, 60, and 80-Day reviews. They will continue to be evaluated using the same process used today and their reviews will not be captured within the HR Onboarding Pilot tool.*

Module 6

Initiating Separation

Closing a ServiceNow HR Onboarding Case



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/RCAs will close automatically at the end of the New Hire's probationary period.

Manual Closure:

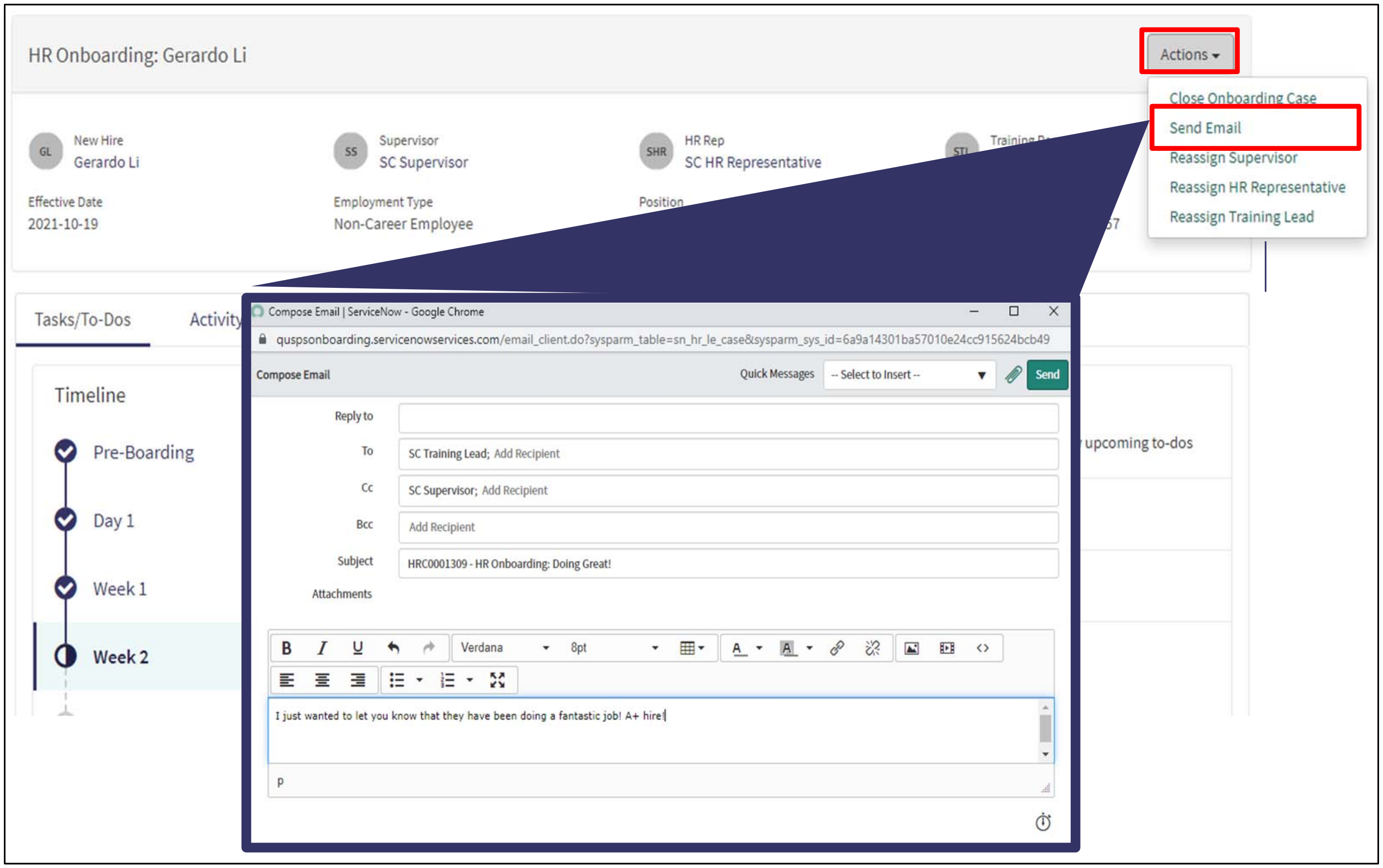
1) ServiceNow HR cases for ARC/RCAs must be closed manually after training is complete.
2) ServiceNow HR cases for <u>any</u> New Hire must be closed manually in the event of a separation from USPS.

Module 7

Communication

Communication – Sending an Email

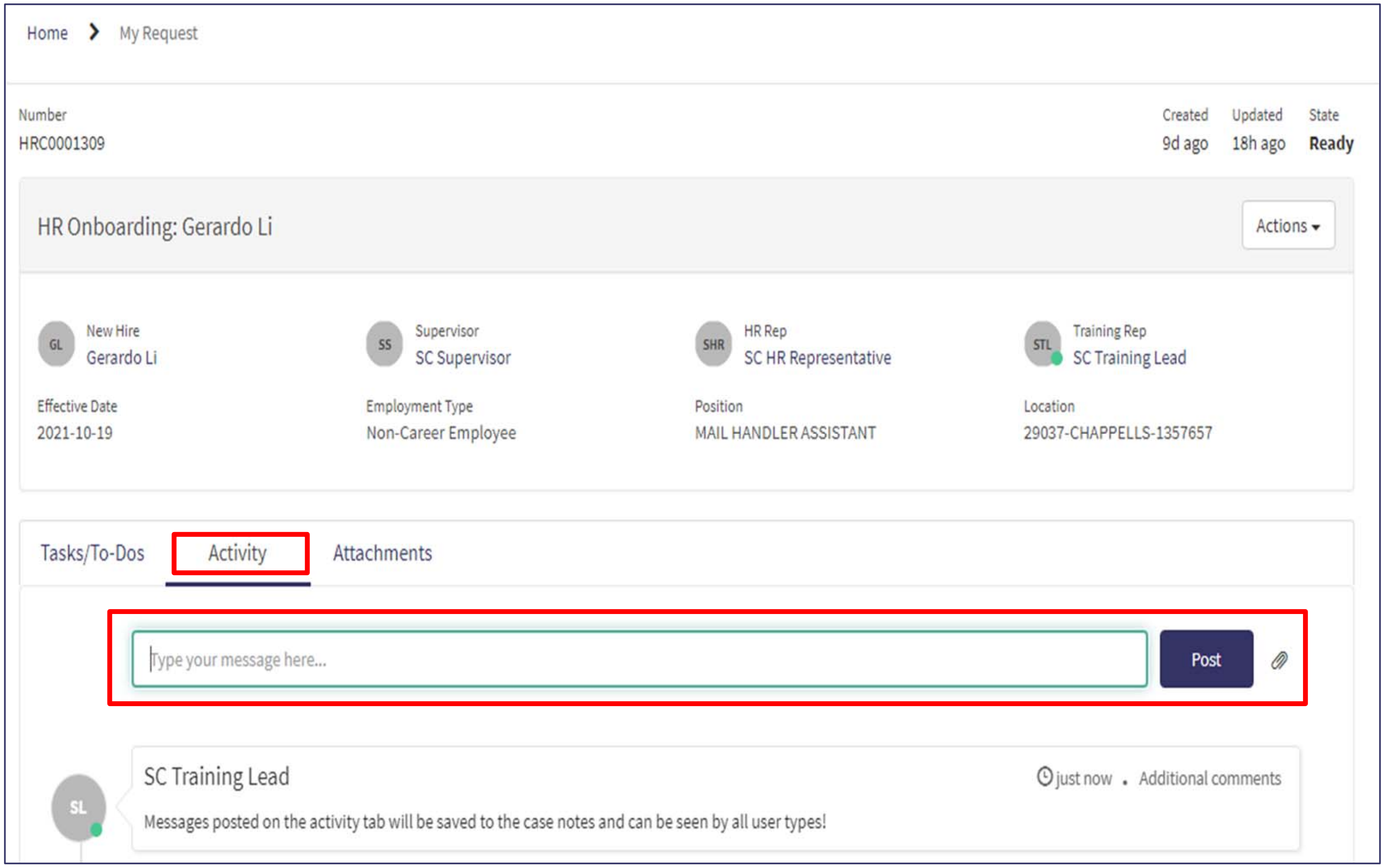
HR Pilot users can send an email to other HR Pilot users, through the case*.The email will be tracked in the case notes.



****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.



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 <u>personal</u> email address.
  - **Emails will not be sent to the New Hire <u>on or after</u> their effective date.**
- Users can validate that these emails have been sent out via the Activity tab of the case.
- System generated emails will <u>not</u> 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

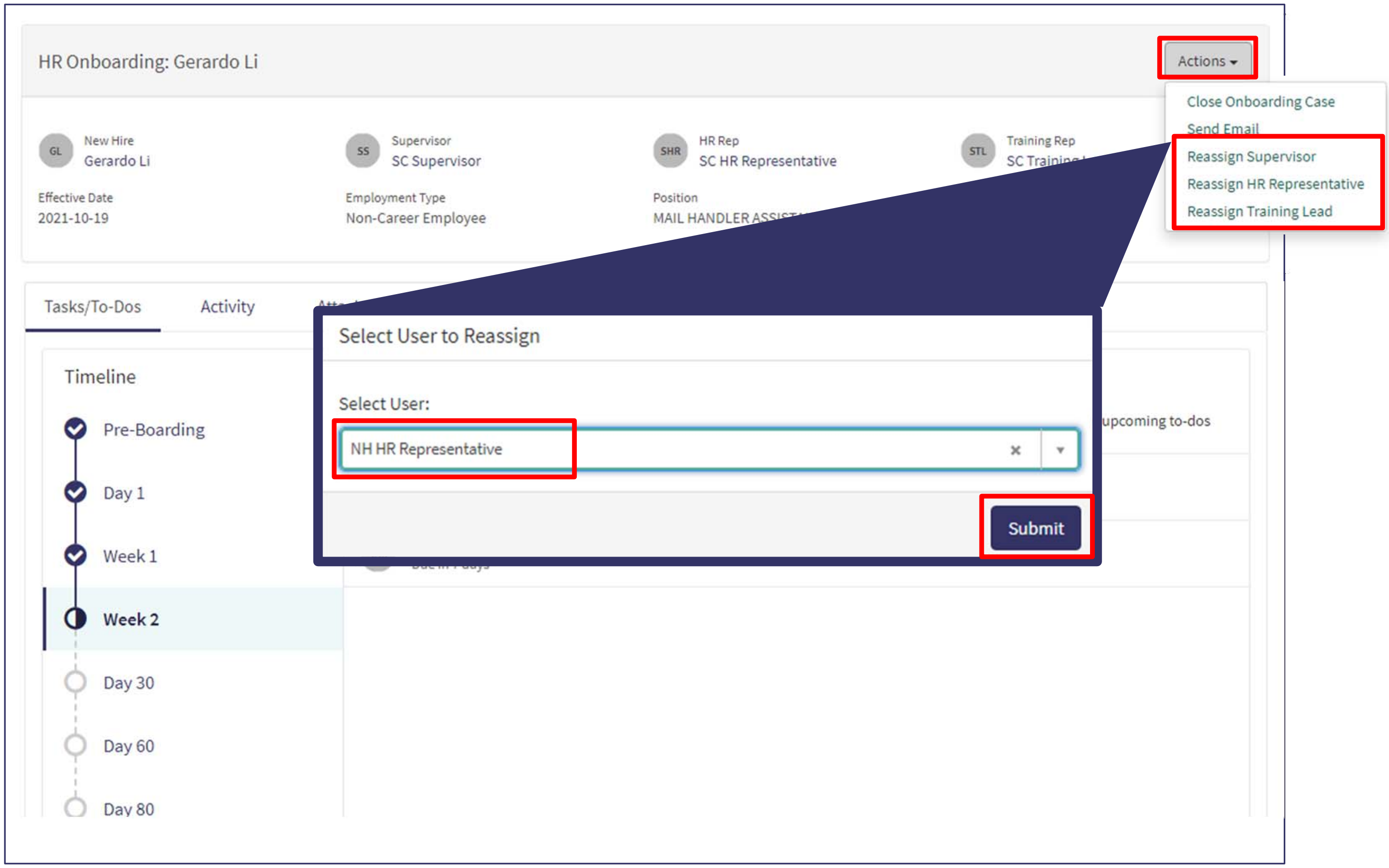
NOTE: *If the task is completed prior to the New Hire's effective date, a system generated email containing the relevant information will be sent. However, if the task is completed past the New Hire's effective date, no system generated email will be sent to the New Hire and it will be the responsibility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

Module 9

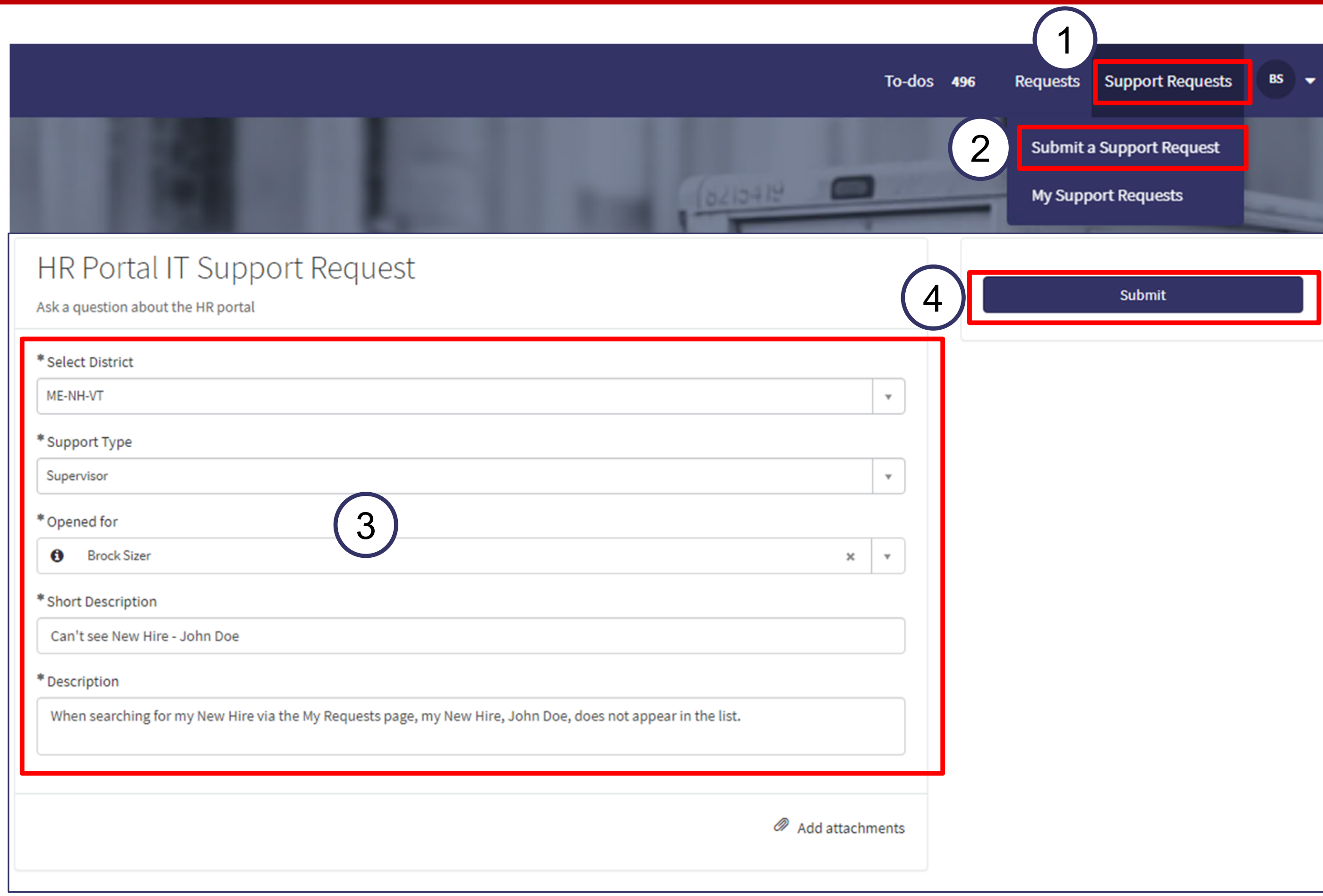
Submitting a Support Request

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



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://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 – 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://qguspsonboarding.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://guspsonboarding.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://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 '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://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. 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://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. 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://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 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'**

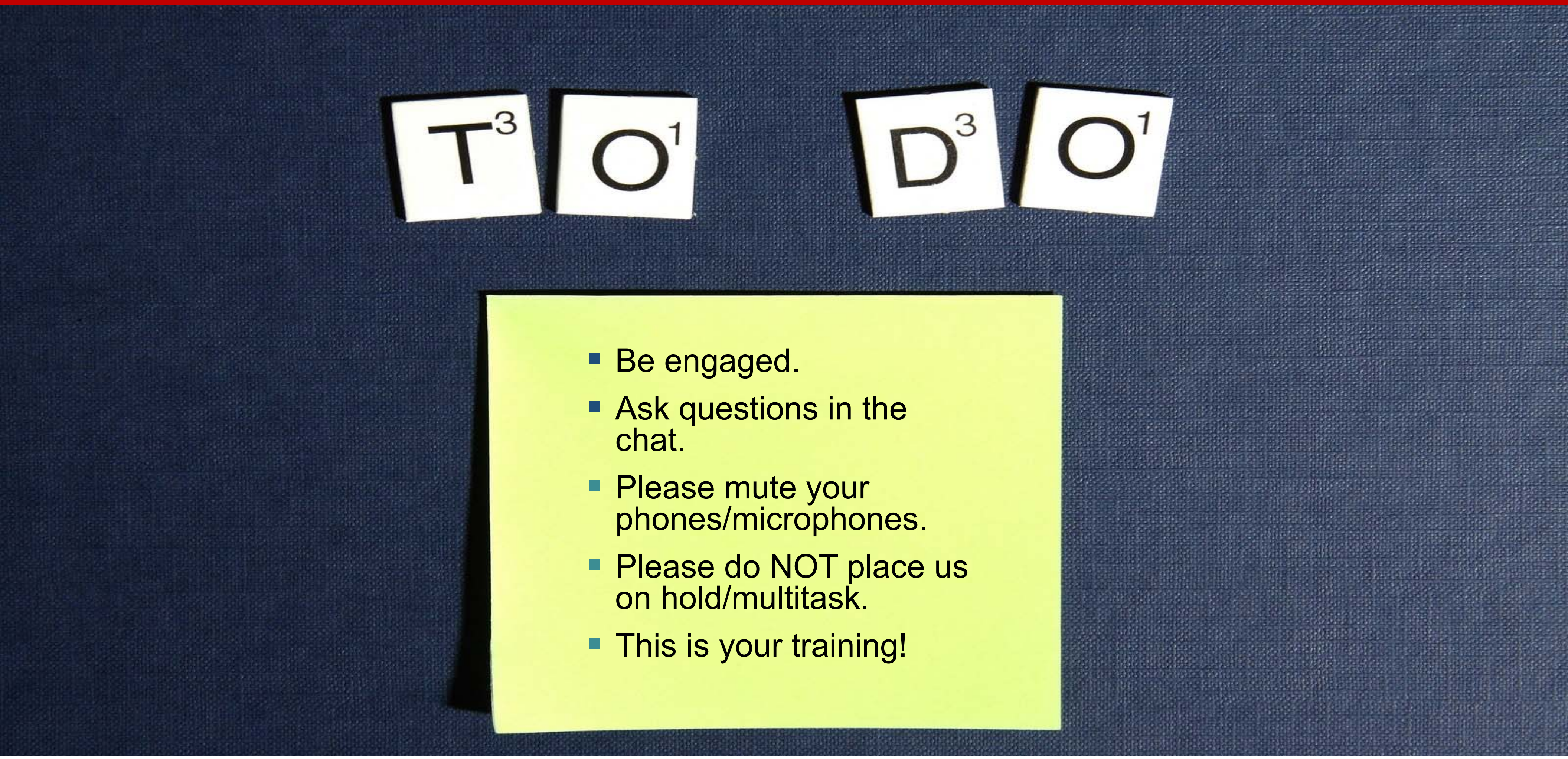
Lab 13 – Working a Support Request

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

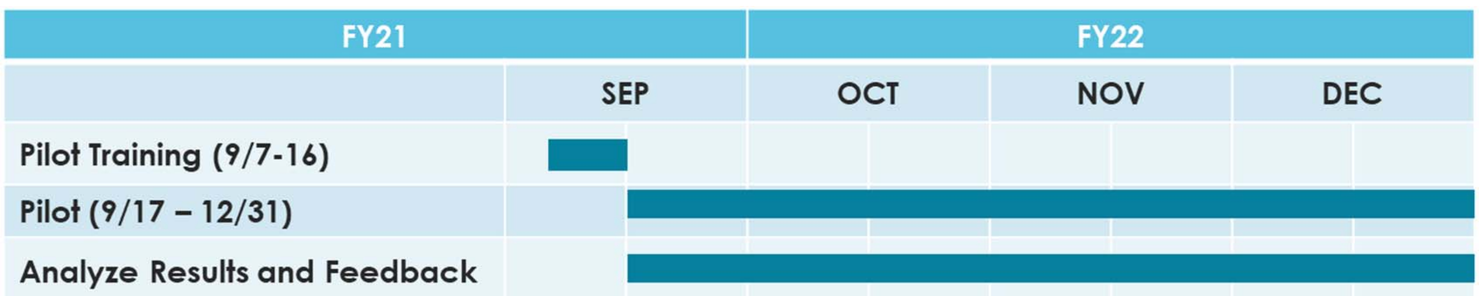
Module	Topic Covered	Est. Time (min)
1.	Portal (Homepage widgets, My Requests Page, My To-Dos Page, My Team Page, Helpful Links)	10
2.	Dashboard & Reporting (Navigating to Dashboard, Dashboard tabs, Dashboard filters)	5
3.	Workflow	25
	3.1 Pre-Boarding	
	3.2 Week 1 Tasks	
	3.3 Day 30 Tasks	
	3.4 Day 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

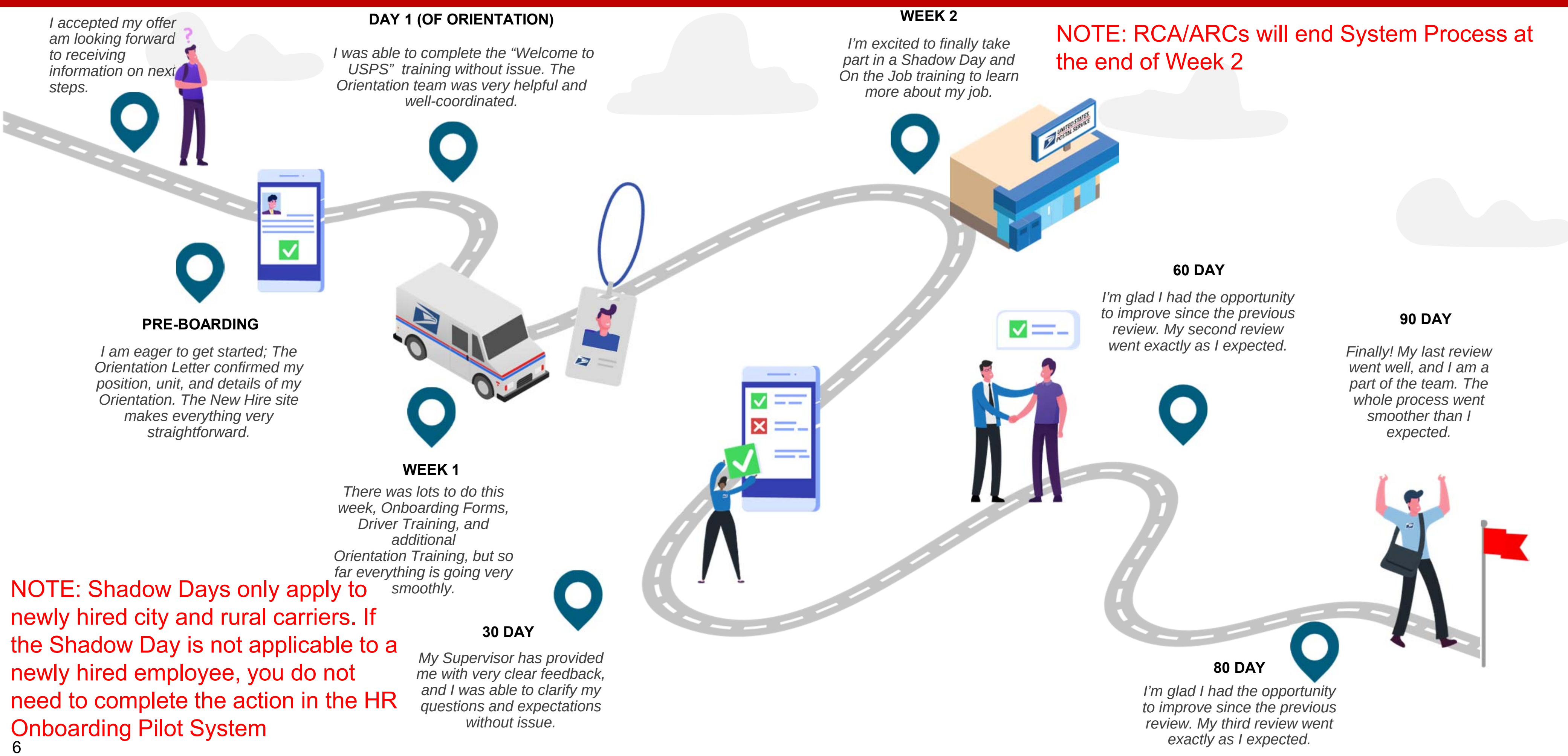
Project Overview

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



Project Overview – HR Onboarding Pilot



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

7

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.

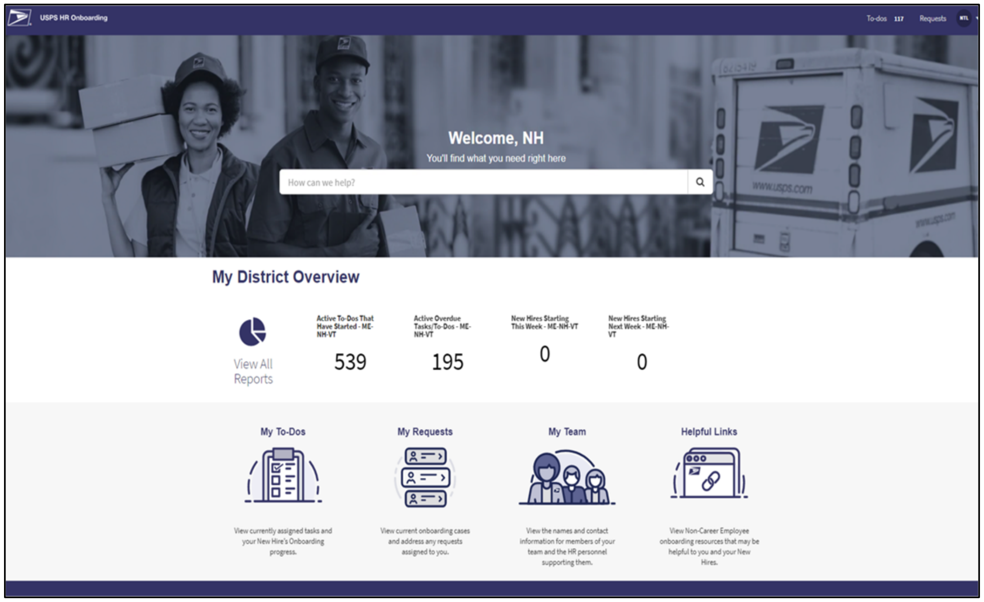
Portal

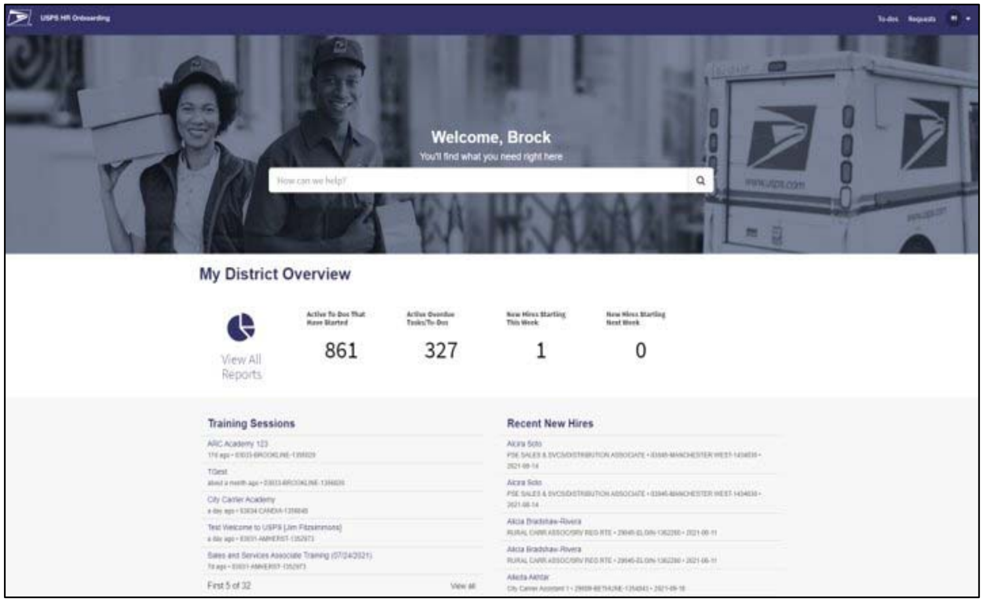
Onboarding Portal

Supervisors will access the Pilot through the Onboarding Portal

Training Portal

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



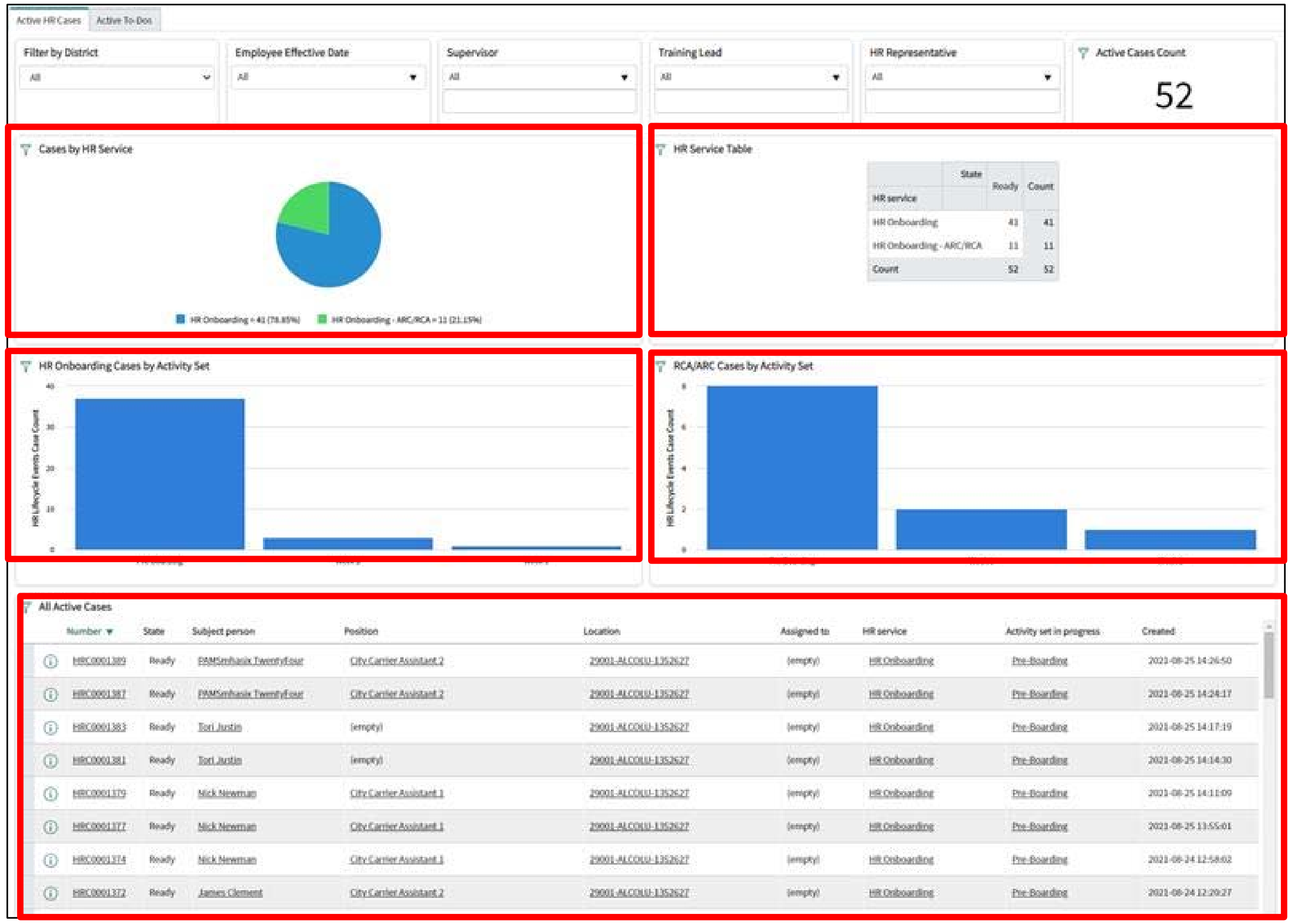


Module 2

Dashboard & Reporting

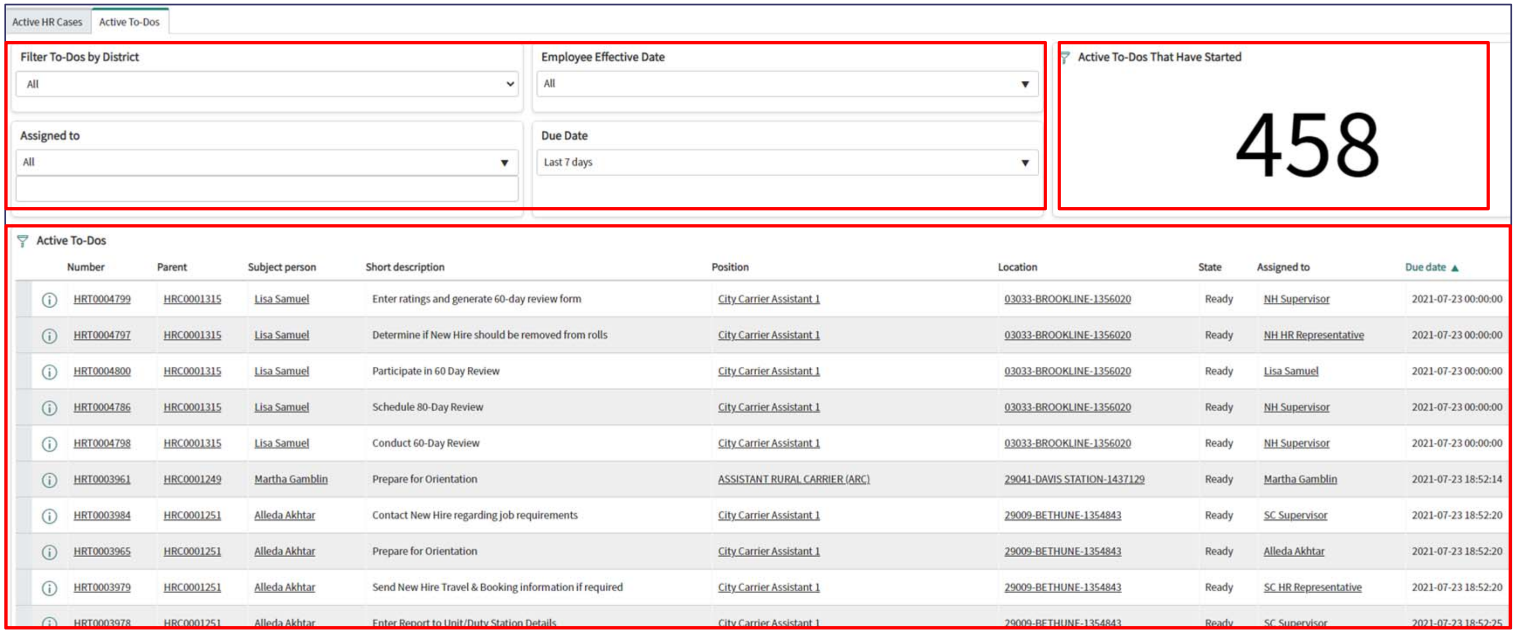
Dashboard & Reporting – Active HR Cases

- **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



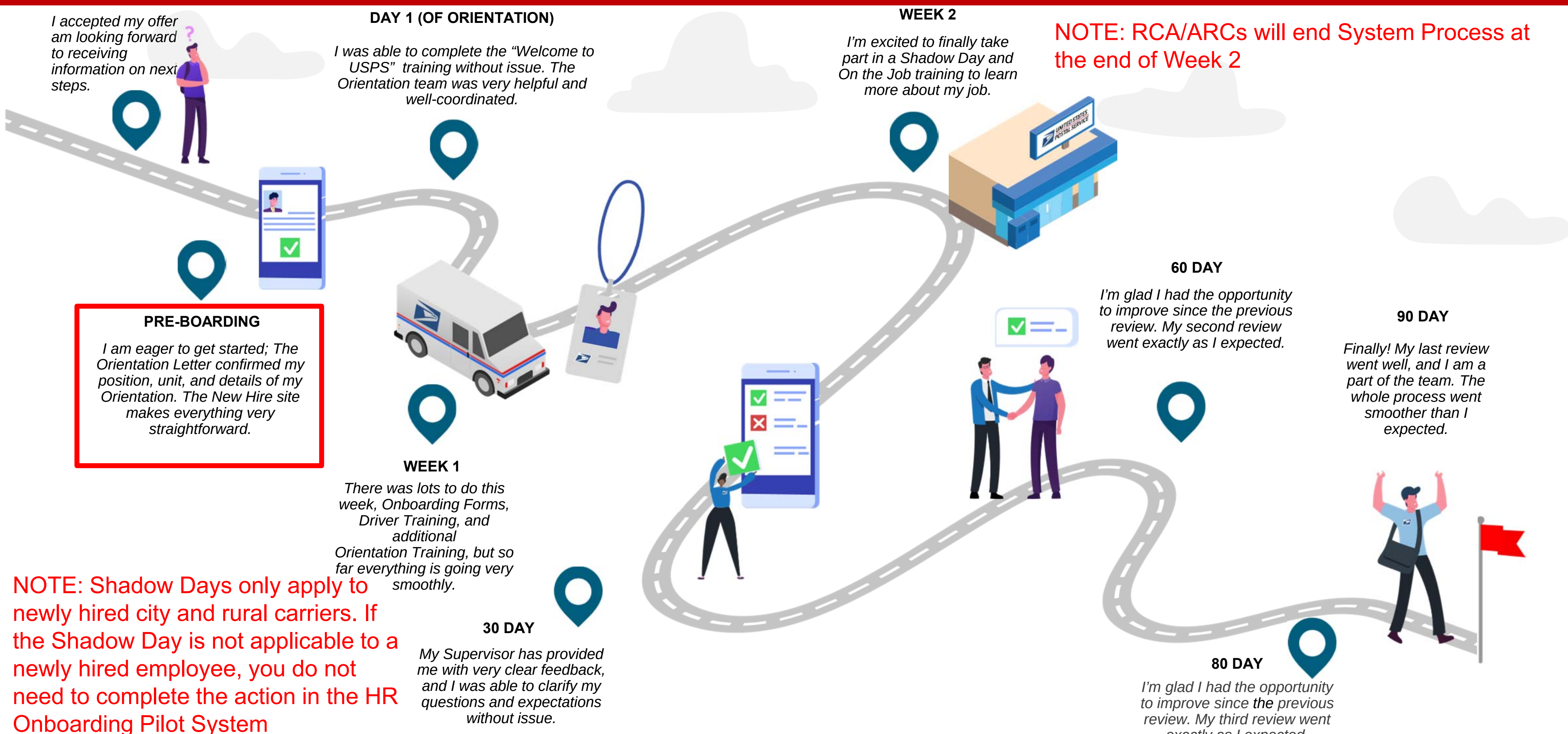
Number	Parent	Subject person	Short description	Position	Location	State	Assigned to	Due date ▲
HRT0004799	HRC0001315	Lisa Samuel	Enter ratings and generate 60-day review form	City Carrier Assistant 1	03033-BROOKLINE-1356020	Ready	NH Supervisor	2021-07-23 00:00:00
HRT0004797	HRC0001315	Lisa Samuel	Determine 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
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
HRT0004786	HRC0001315	Lisa Samuel	Schedule 80-Day Review	City Carrier Assistant 1	03033-BROOKLINE-1356020	Ready	NH Supervisor	2021-07-23 00:00:00
HRT0004798	HRC0001315	Lisa Samuel	Conduct 60-Day Review	City Carrier Assistant 1	03033-BROOKLINE-1356020	Ready	NH Supervisor	2021-07-23 00:00:00
HRT0003961	HRC0001249	Martha Gamblin	Prepare for Orientation	ASSISTANT RURAL CARRIER (ARC)	29041-DAVIS STATION-1437129	Ready	Martha Gamblin	2021-07-23 18:52:14
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
HRT0003965	HRC0001251	Alleda Akhtar	Prepare for Orientation	City Carrier Assistant 1	29009-BETHUNE-1354843	Ready	Alleda Akhtar	2021-07-23 18:52:20
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
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

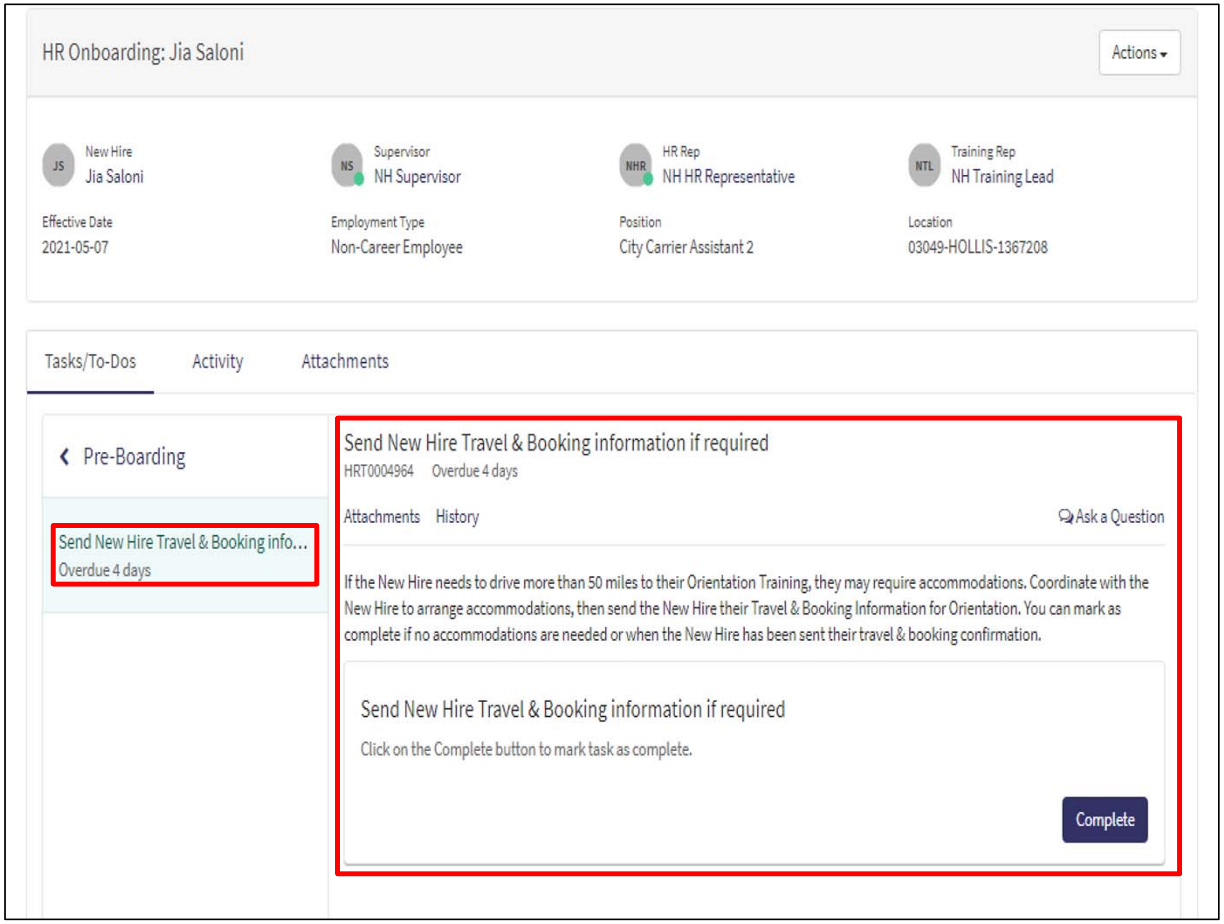
Project Overview - USPS HR Onboarding Pilot Journey Map



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.



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.

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

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.

80 DAY

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

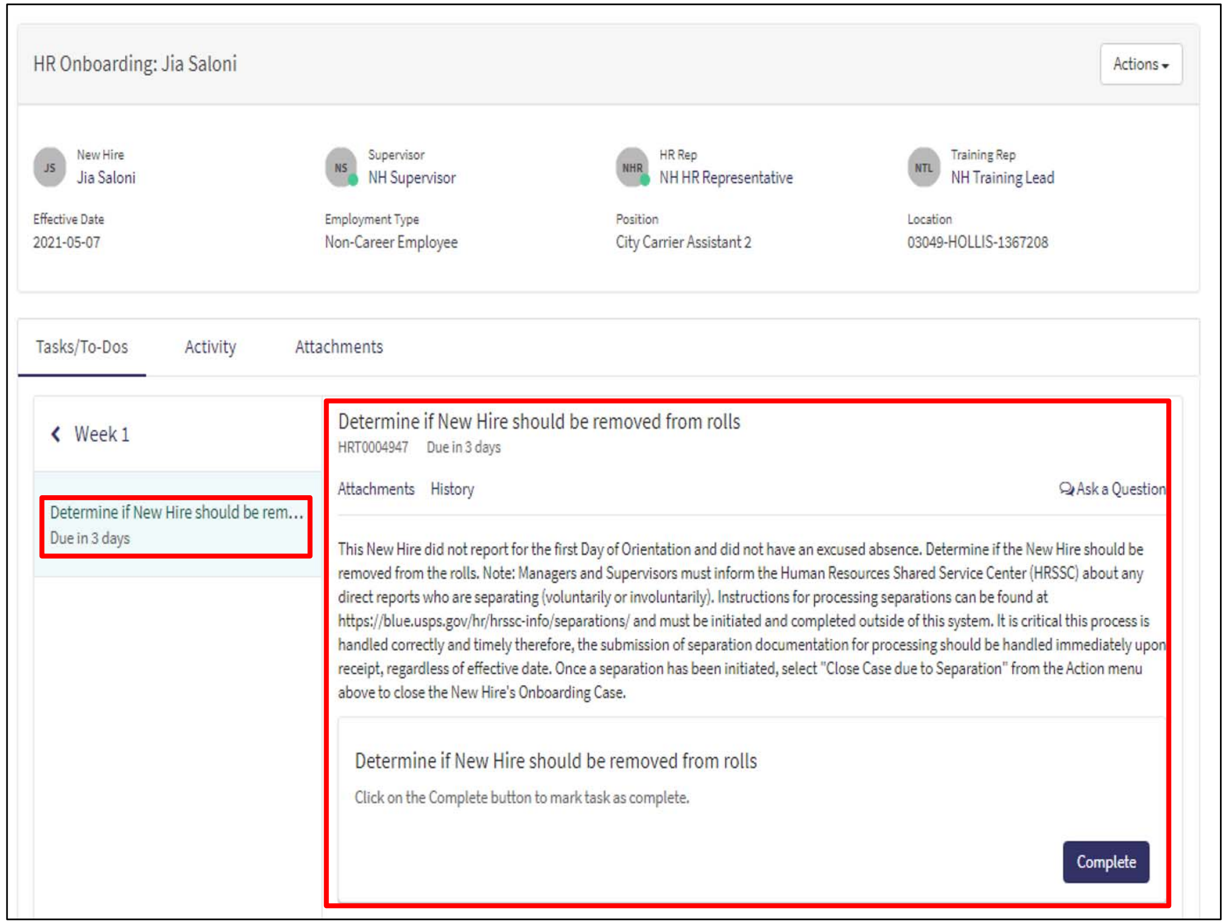
90 DAY

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

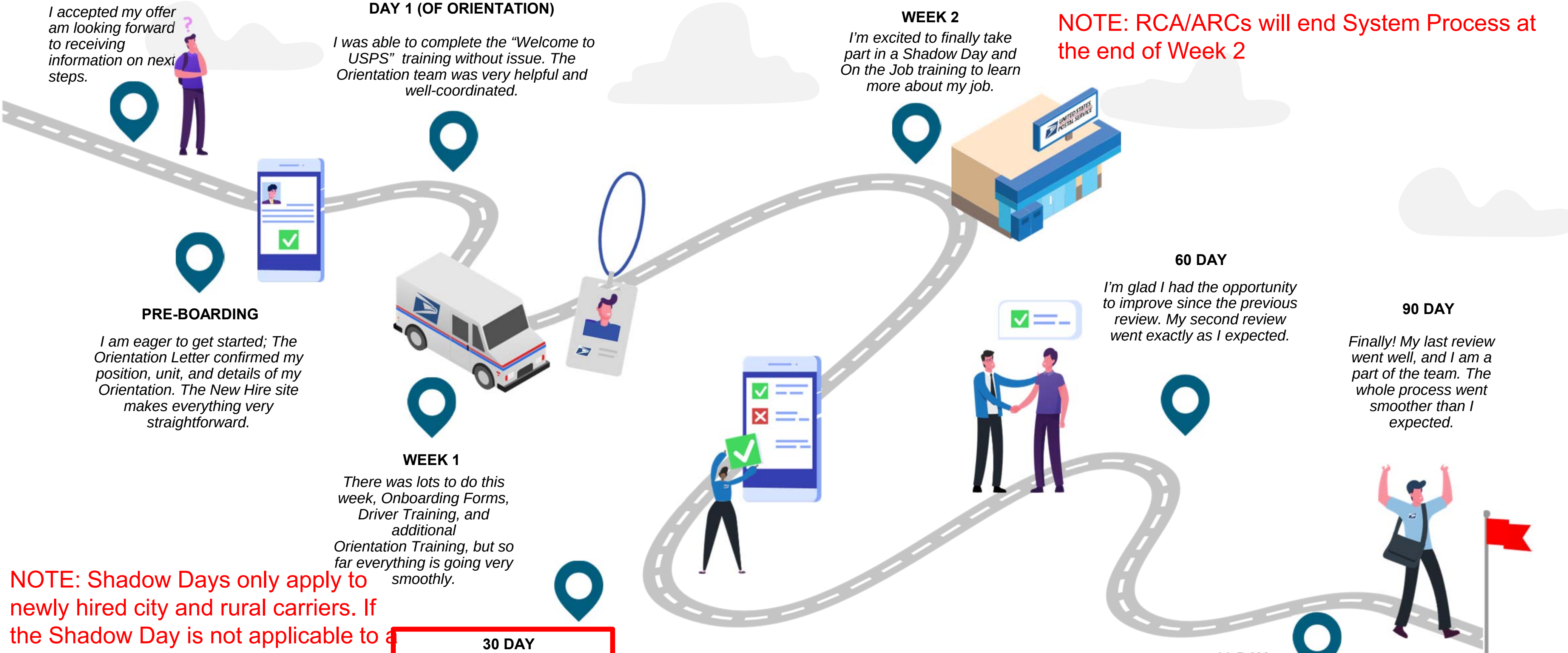
NOTE: Shadow Days only apply to newly hired city and rural carriers. If the Shadow Day is not applicable to a newly hired employee, you do not need to complete the action in the HR Onboarding Pilot System

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.



Project Overview - USPS HR Onboarding Pilot Journey Map



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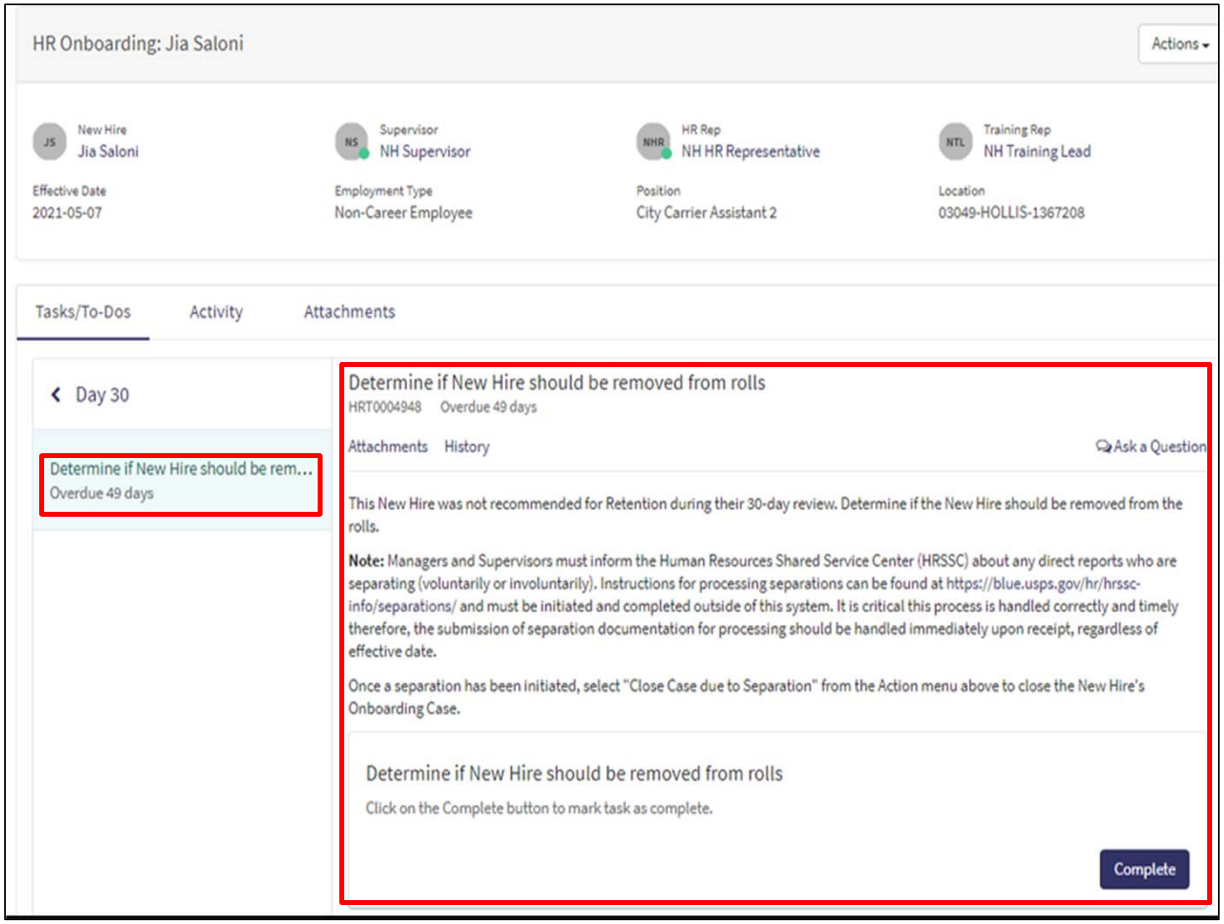
Workflow – Day 30 Tasks

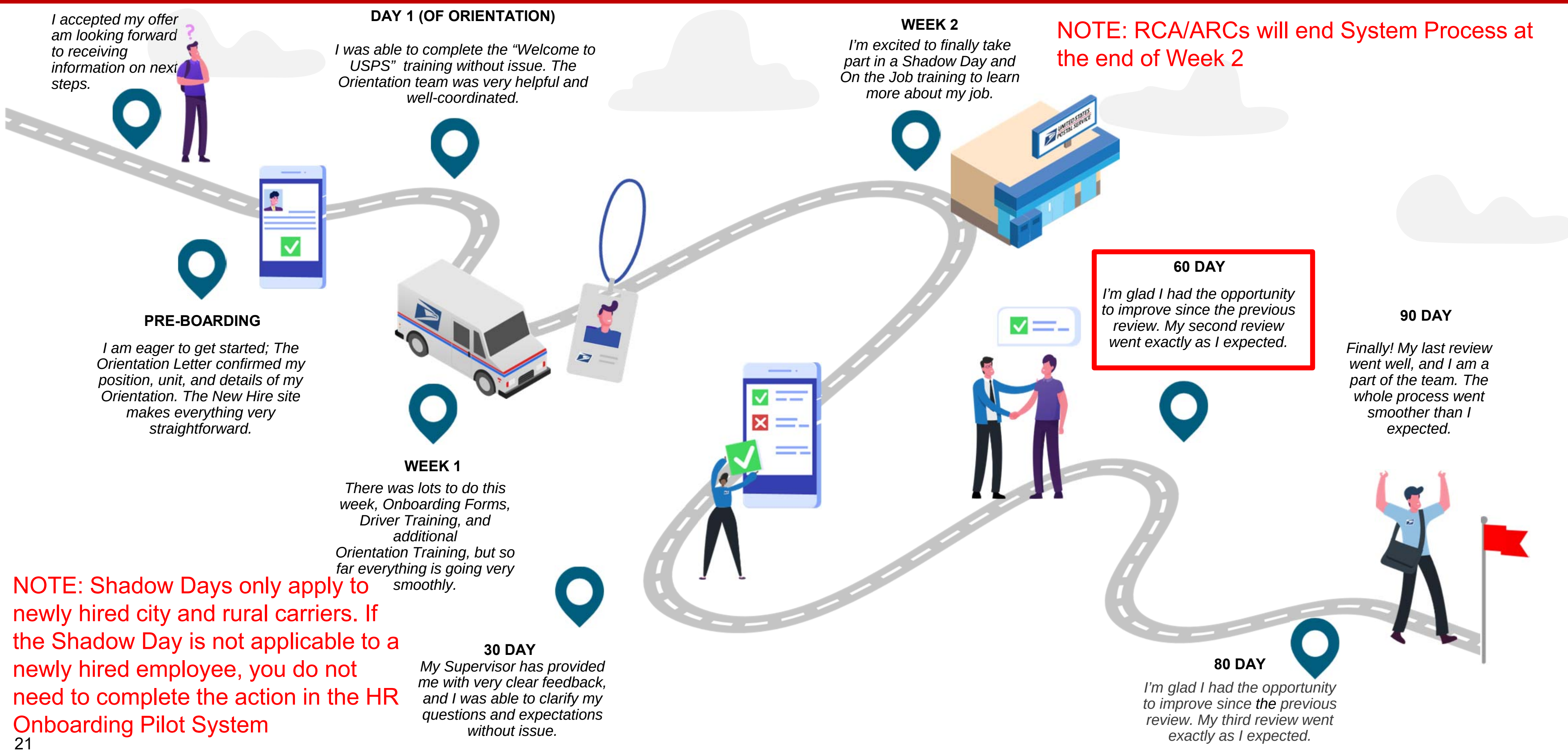
Determine if New Hire should be removed from rolls:

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.*

Project Overview - USPS HR Onboarding Pilot Journey Map



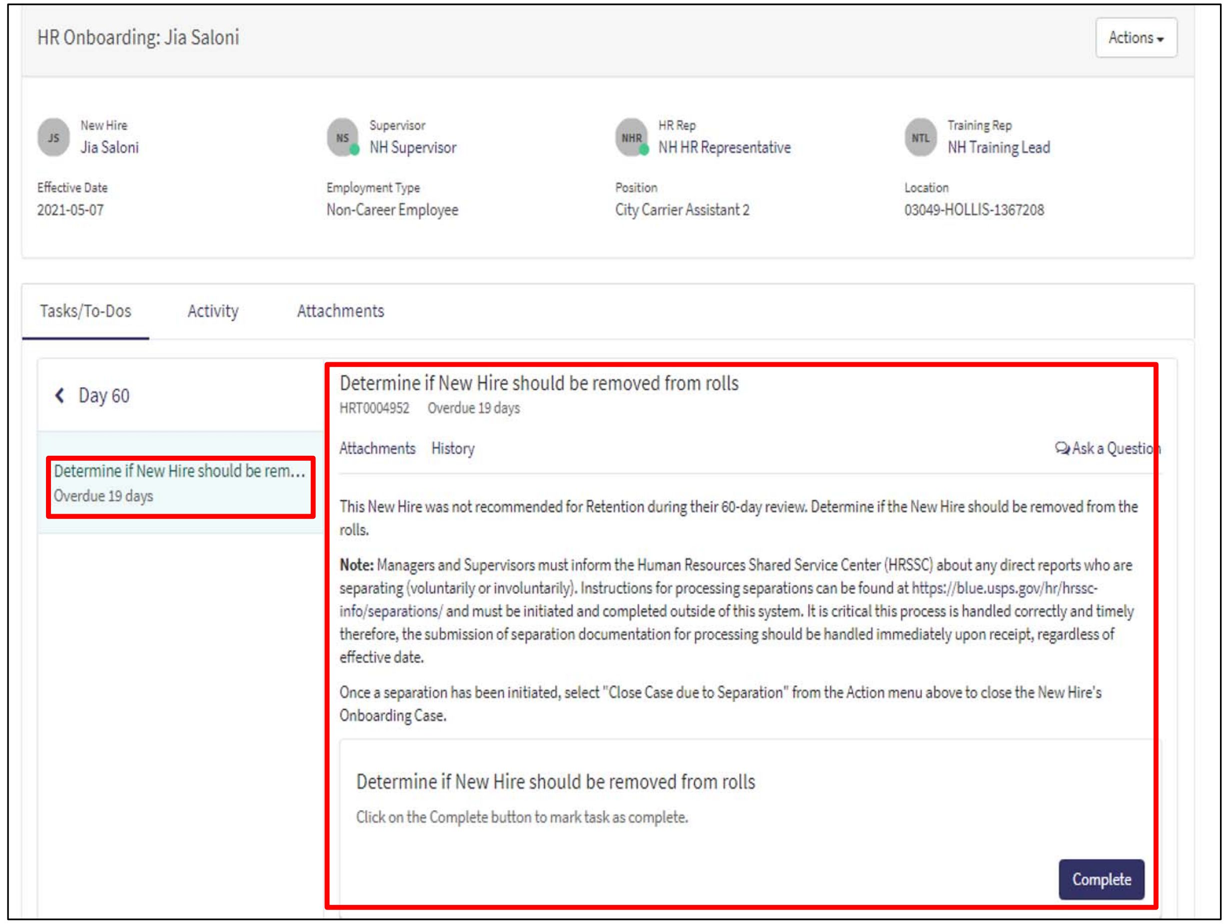
NOTE: RCA/ARCs will end System Process at the end of Week 2

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.



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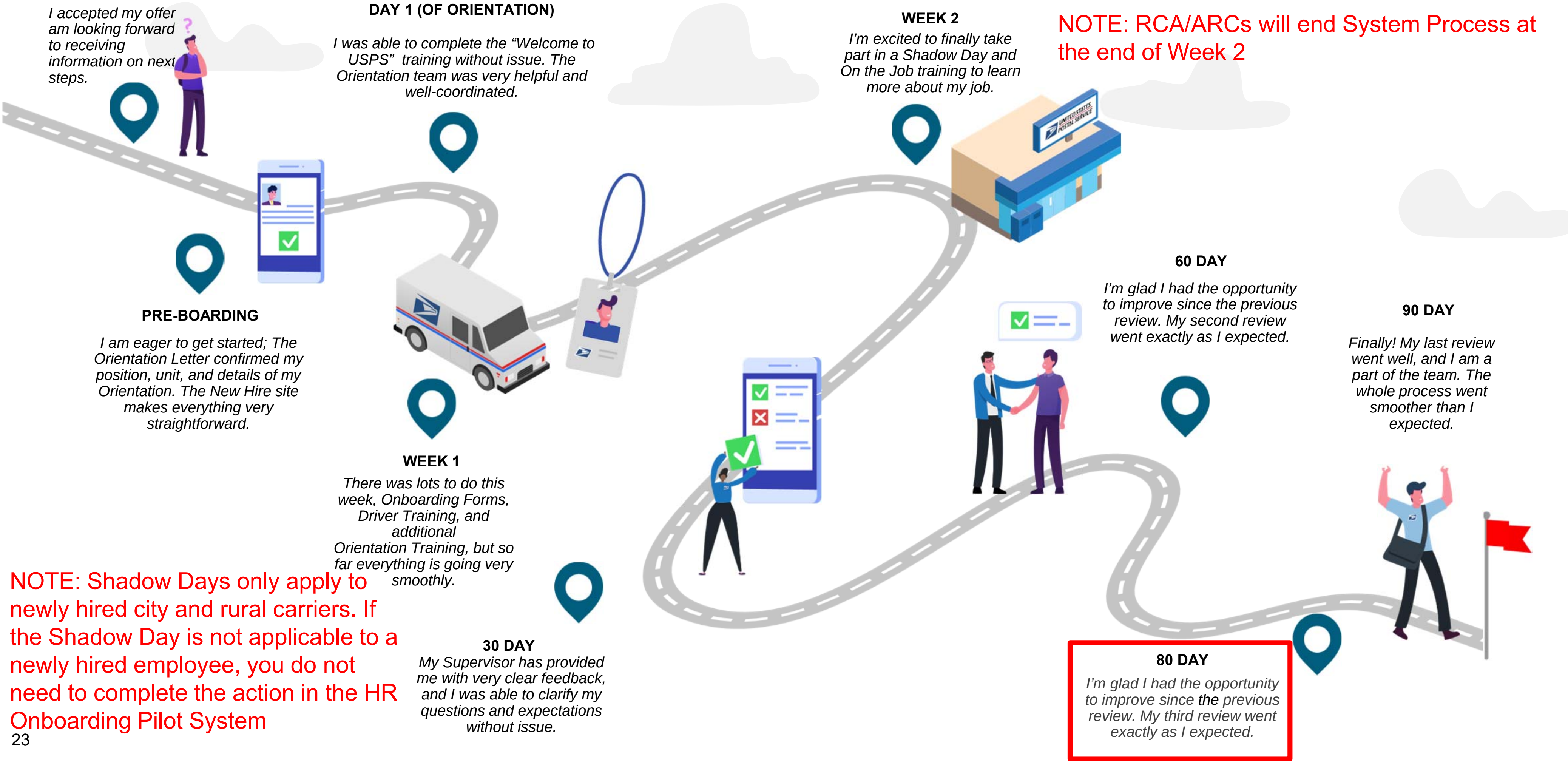
Project Overview - USPS HR Onboarding Pilot Journey Map



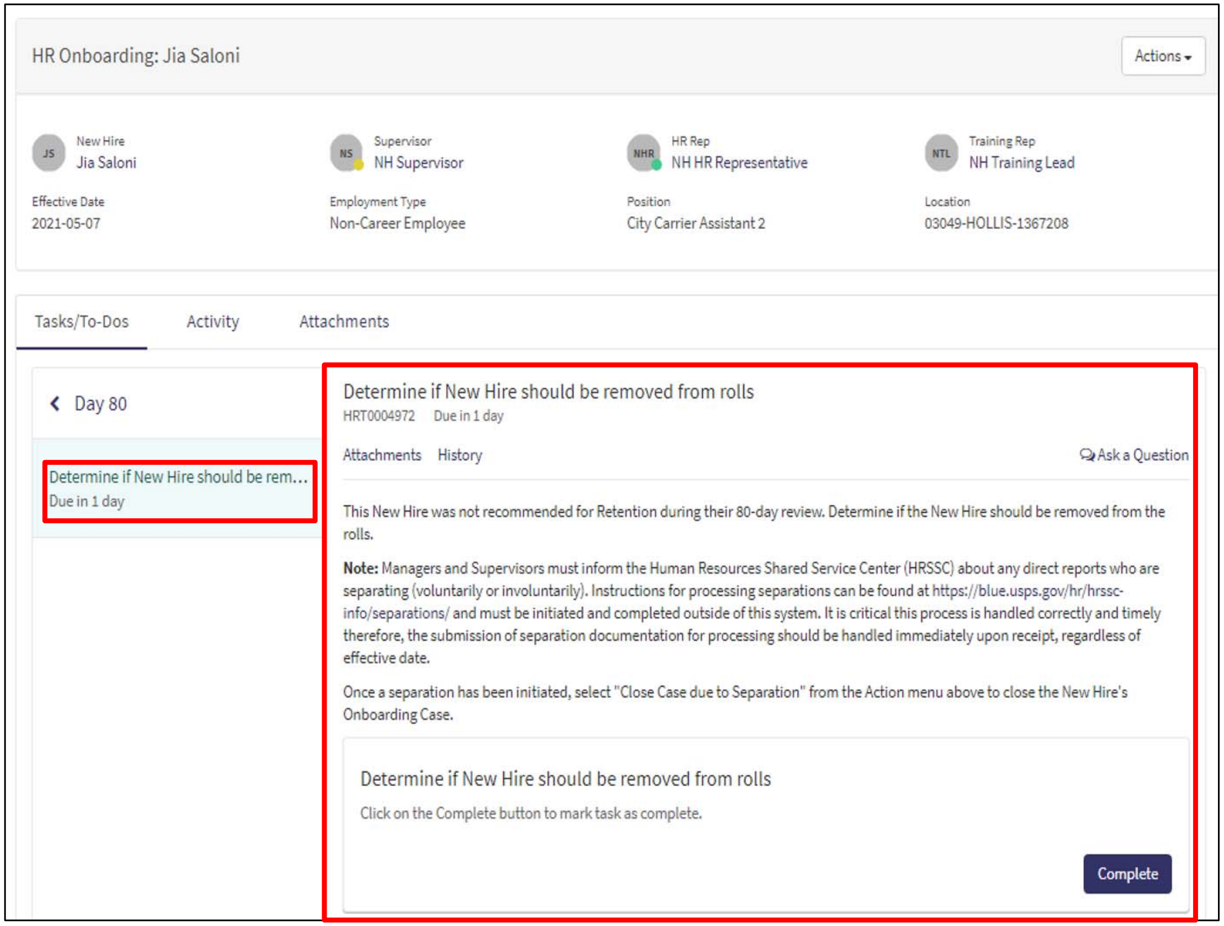
NOTE: RCA/ARCs will end System Process at the end of Week 2

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.

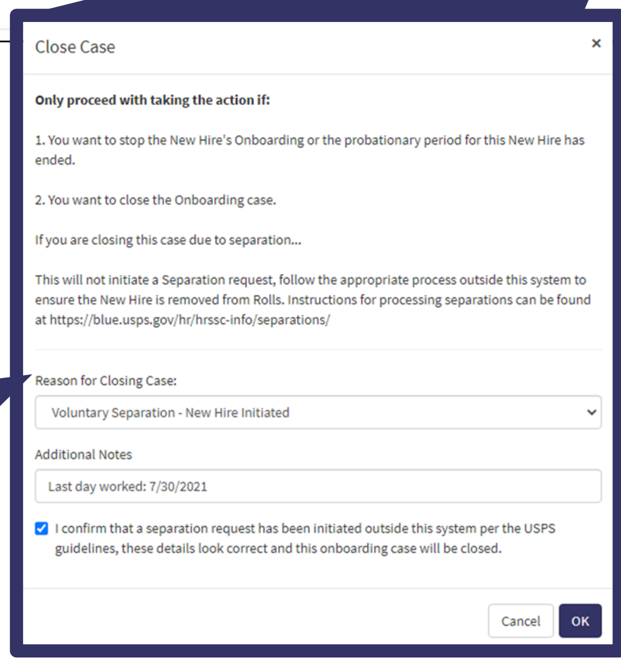


NOTE: *RCAs/ARCs will be excluded from the scheduling and completion of automated PS Form 1750 evaluations at the 30, 60, and 80-Day reviews. They will continue to be evaluated using the same process used today and their reviews will not be captured within the HR Onboarding Pilot tool.*

Module 4

Initiating Separation

Closing a ServiceNow HR Onboarding Case



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/RCAs will close automatically at the end of the New Hire's probationary period.

Manual Closure:

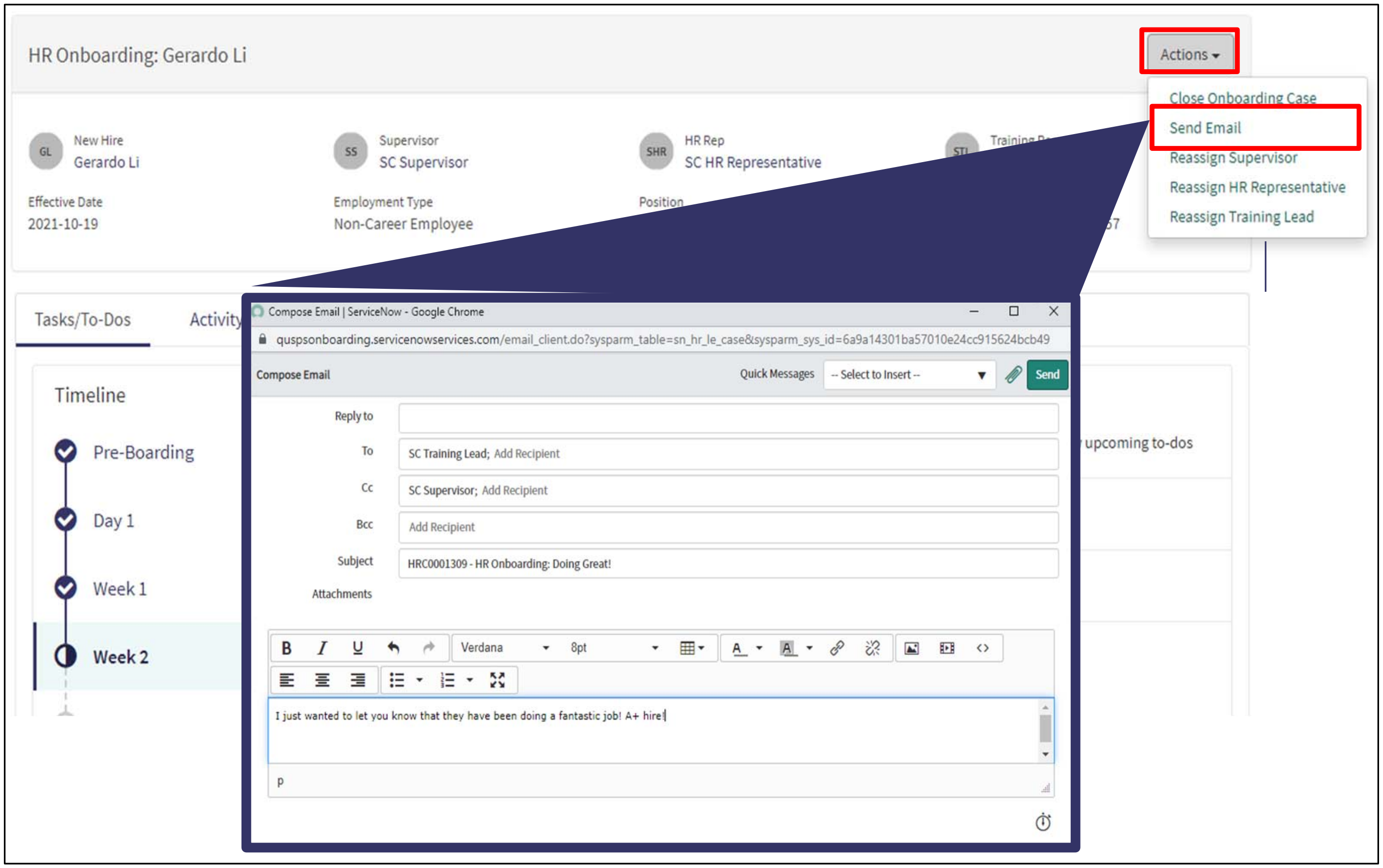
1) ServiceNow HR cases for ARC/RCAs must be closed manually after training is complete.
2) ServiceNow HR cases for <u>any</u> New Hire must be closed manually in the event of a separation from USPS.

Module 5

Communications

Communication – Sending an Email

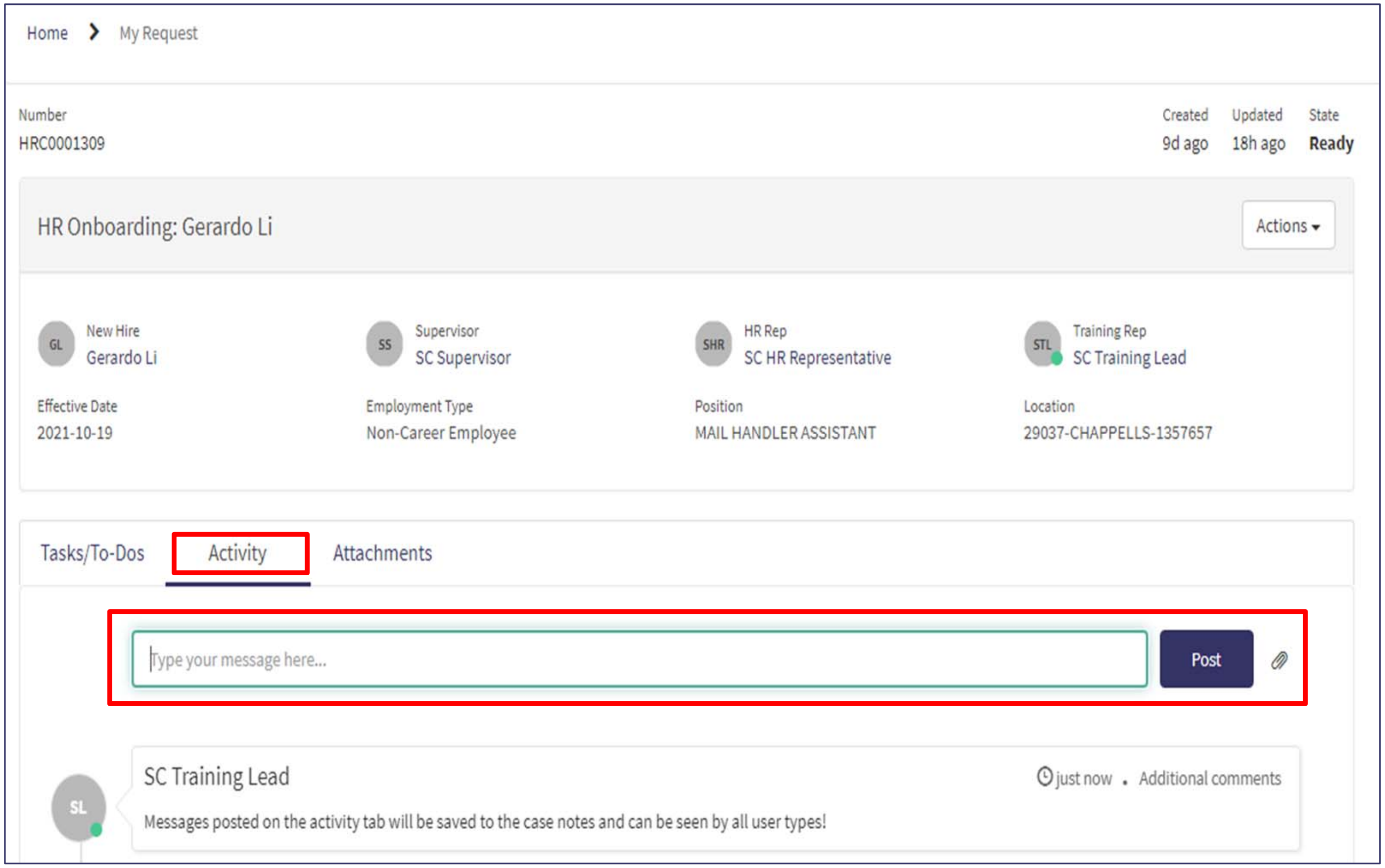
HR Pilot users can send an email to other HR Pilot users, through the case*.The email will be tracked in the case notes.



***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.



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 <u>personal</u> email address.
  - **Emails will not be sent to the New Hire <u>on or after</u> their effective date.**
- Users can validate that these emails have been sent out via the Activity tab of the case.
- System generated emails will <u>not</u> 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

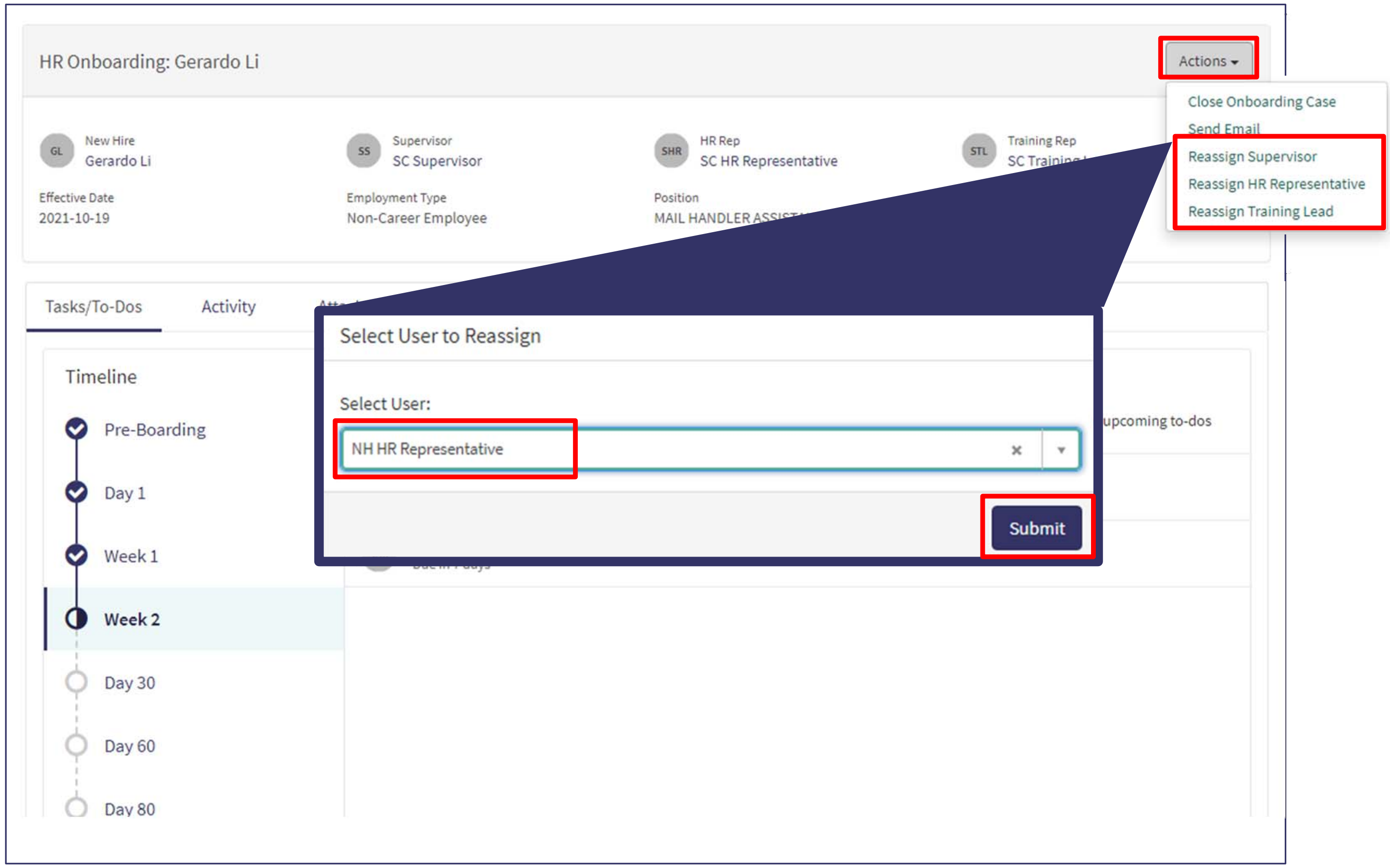
***NOTE:** *If the task is completed prior to the New Hire's effective date, a system generated email containing the relevant information will be sent. However, if the task is completed past the New Hire's effective date, no system generated email will be sent to the New Hire and it will be the responsibility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

Module 7

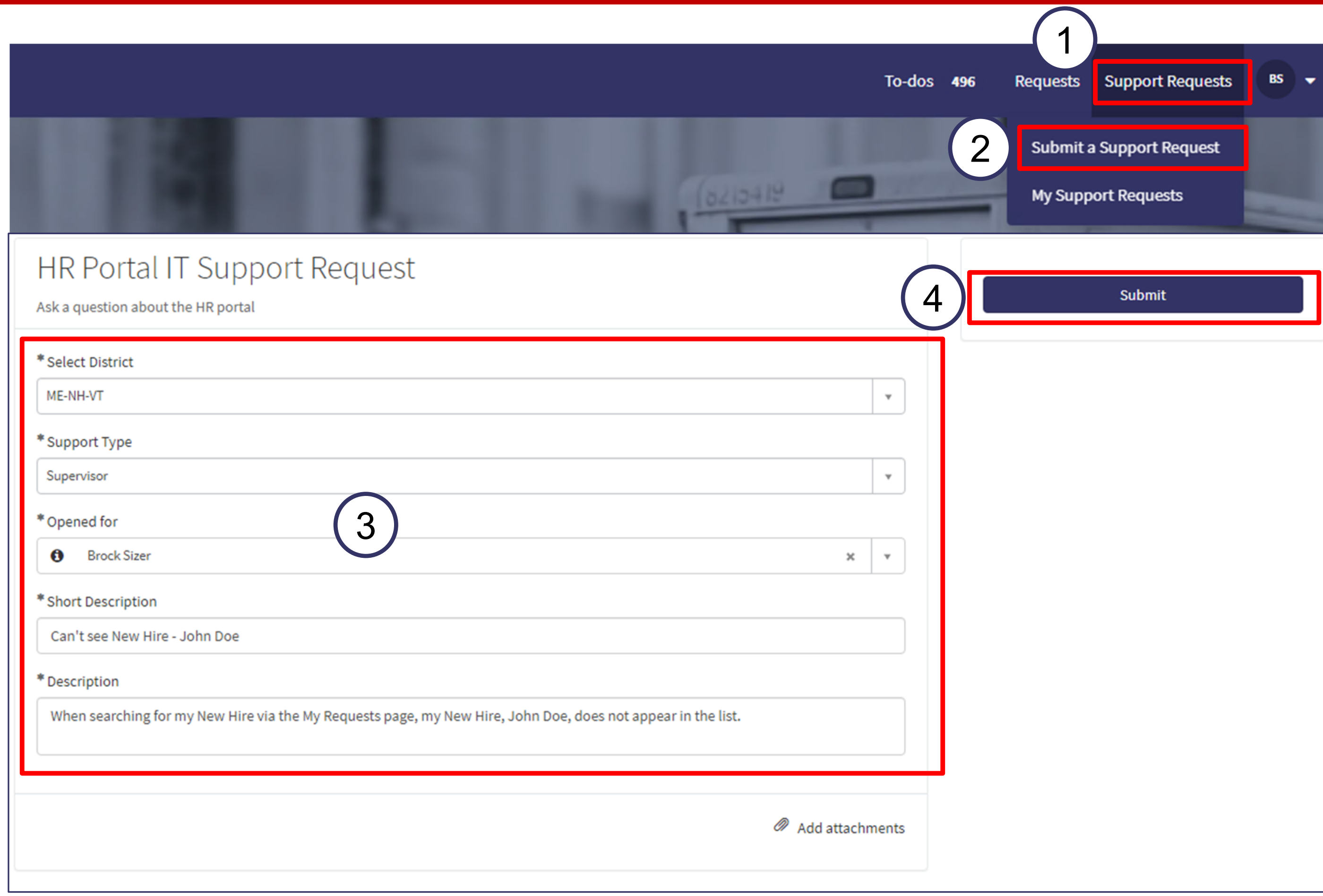
Submitting a Support Request

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



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://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 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://qupsonboarding.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://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 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://guspsonboarding.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://guspsonboarding.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

- 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

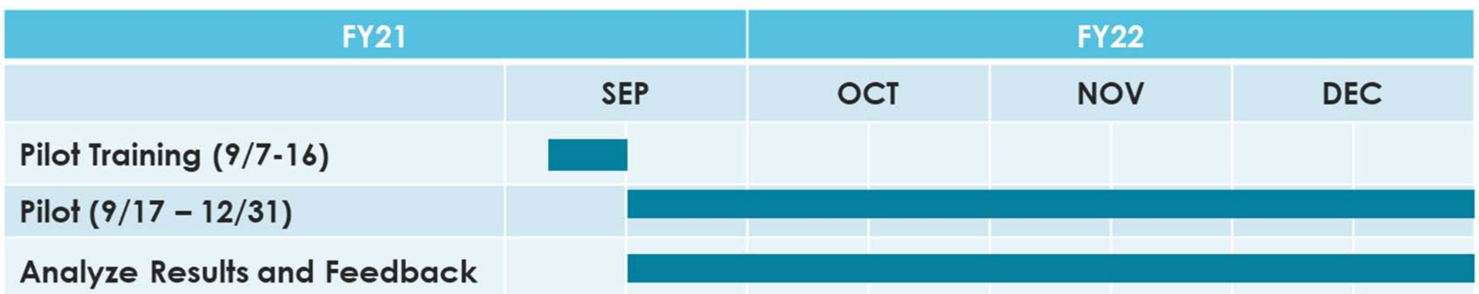
Module	Topic Covered	Est. Time (min)
1.	Portal (Homepage widgets, My Requests Page, My To-Dos Page, My Team Page, Helpful Links)	5
2.	Dashboard & Reporting (Navigating to Dashboard, Dashboard tabs, Dashboard filters)	5
3.	Workflow	30
	3.1 Day 1 Tasks	
	3.2 Week 1 Tasks	
	3.3 Week 2 Tasks	
	3.4 Day 30 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

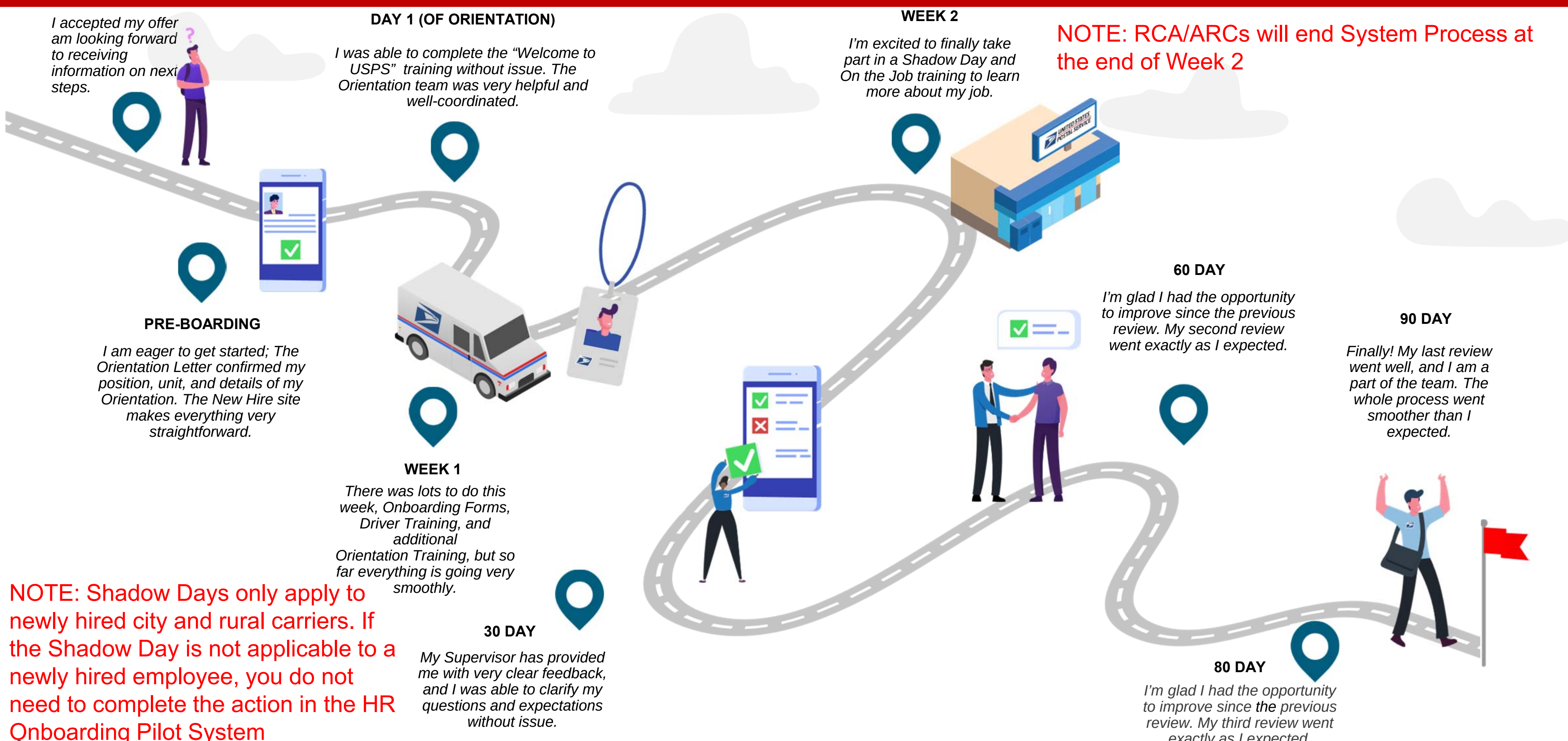
Project Overview

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



Project Overview - USPS HR Onboarding Pilot Journey Map



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

7

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.

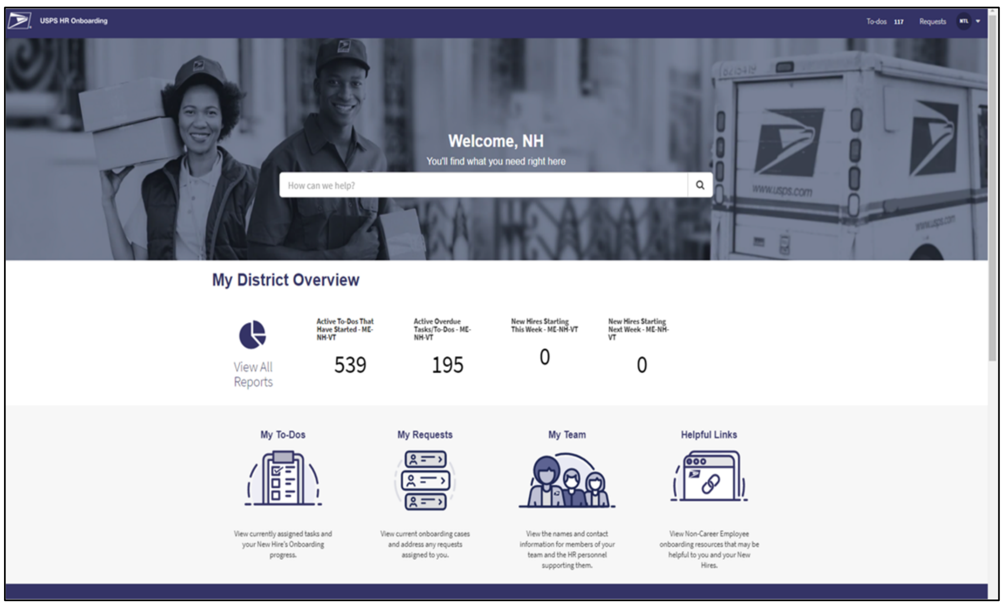
Portal

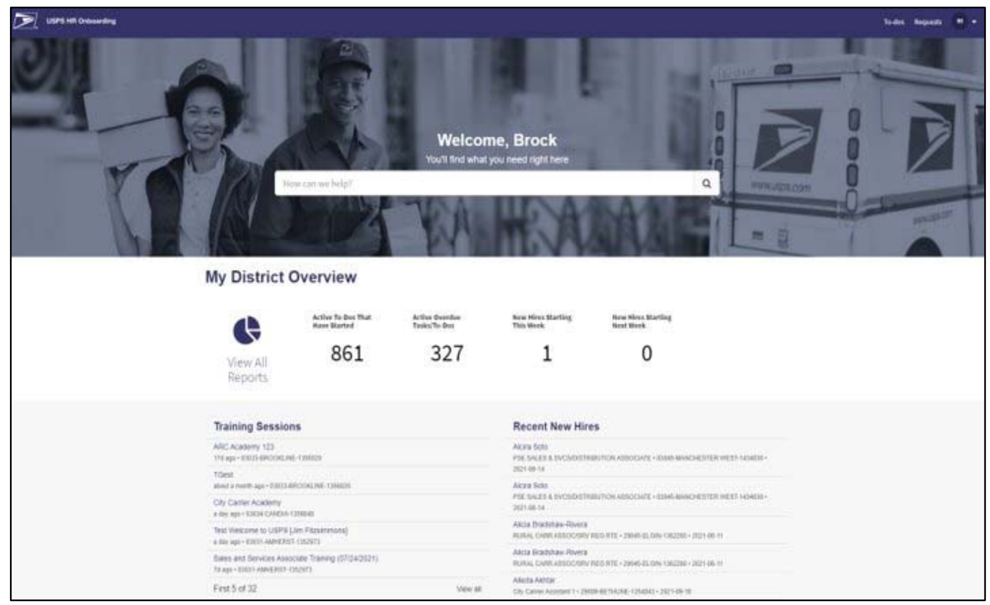
Onboarding Portal

Supervisors will access the Pilot through the Onboarding Portal

Training Portal

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



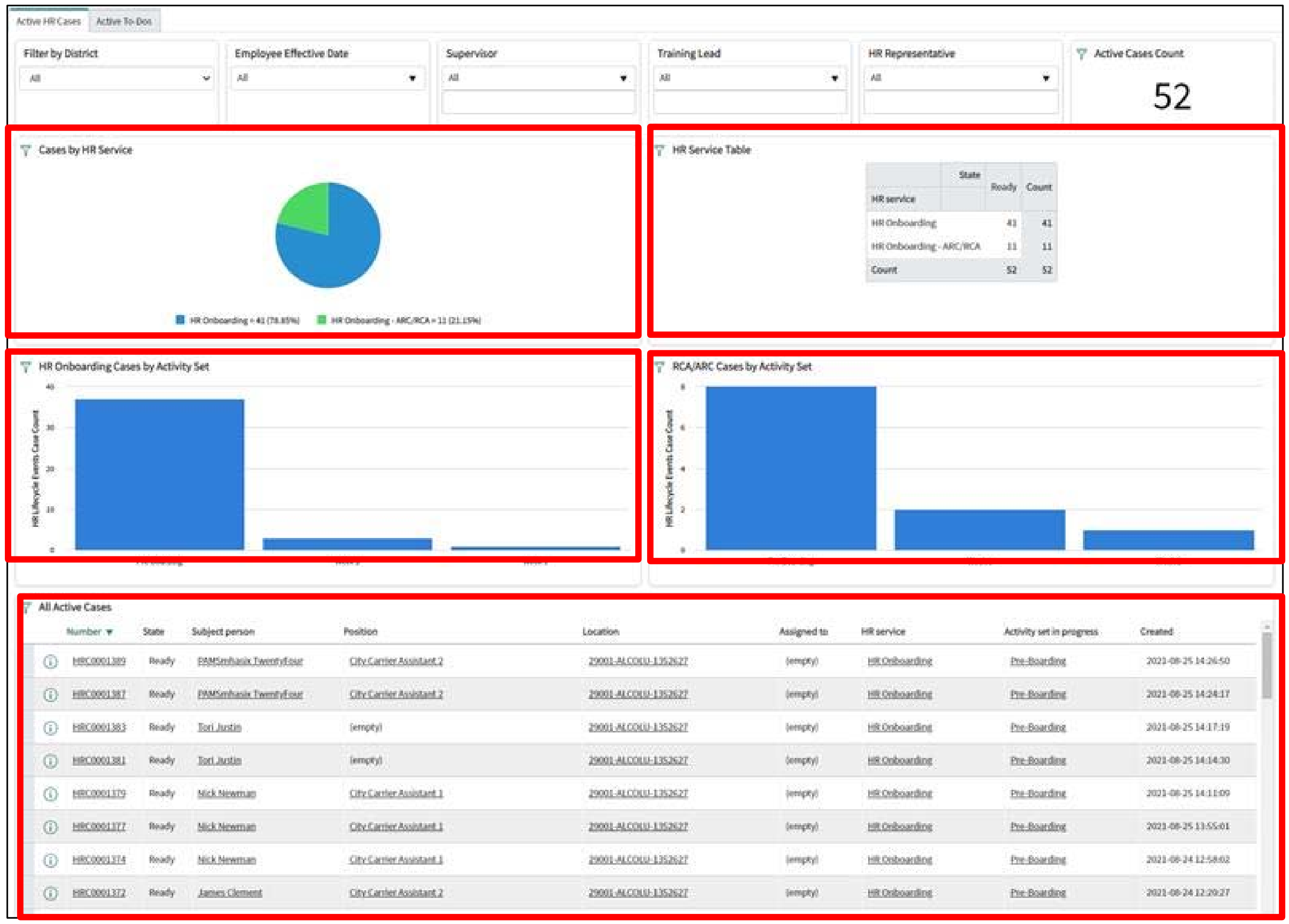


Module 2

Dashboard & Reporting

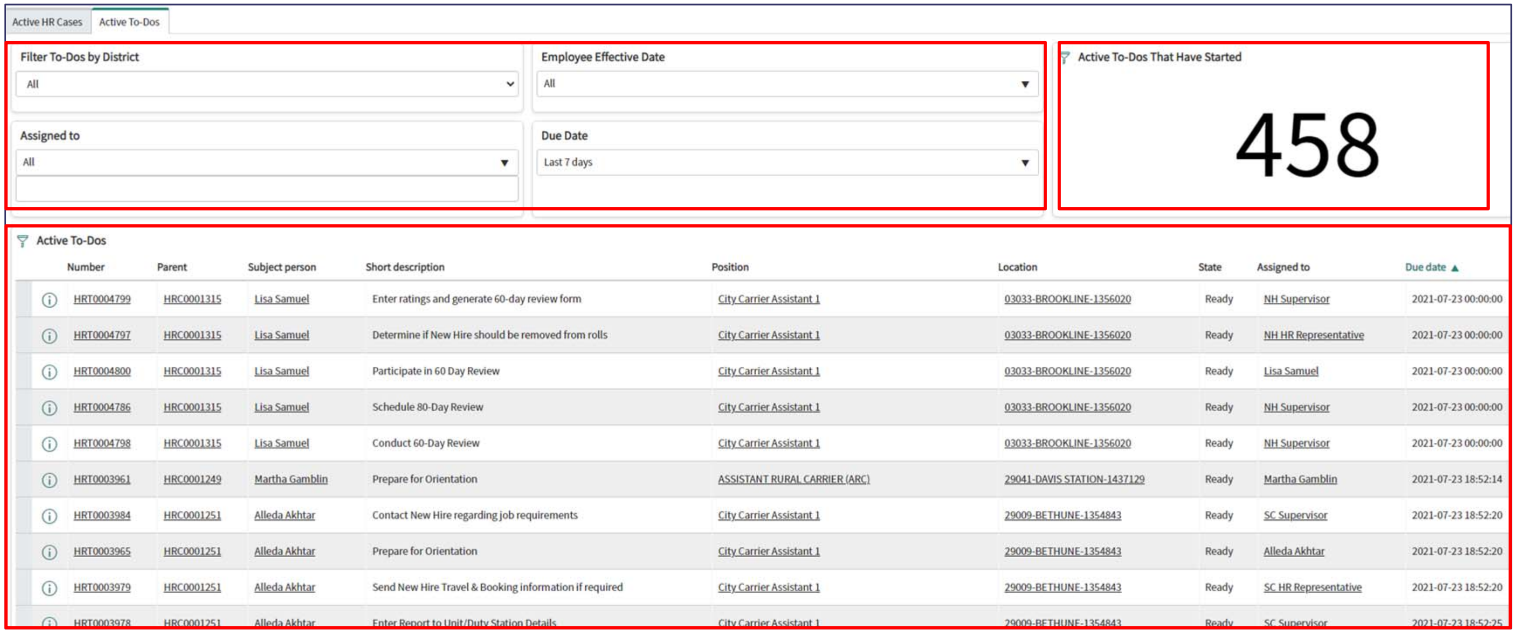
Dashboard & Reporting – Active HR Cases

- **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



Number	Parent	Subject person	Short description	Position	Location	State	Assigned to	Due date ▲
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
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
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
HRT0004786	HRC0001315	Lisa Samuel	Schedule 80-Day Review	City Carrier Assistant 1	03033-BROOKLINE-1356020	Ready	NH Supervisor	2021-07-23 00:00:00
HRT0004798	HRC0001315	Lisa Samuel	Conduct 60-Day Review	City Carrier Assistant 1	03033-BROOKLINE-1356020	Ready	NH Supervisor	2021-07-23 00:00:00
HRT0003961	HRC0001249	Martha Gamblin	Prepare for Orientation	ASSISTANT RURAL CARRIER (ARC)	29041-DAVIS STATION-1437129	Ready	Martha Gamblin	2021-07-23 18:52:14
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
HRT0003965	HRC0001251	Alleda Akhtar	Prepare for Orientation	City Carrier Assistant 1	29009-BETHUNE-1354843	Ready	Alleda Akhtar	2021-07-23 18:52:20
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
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.

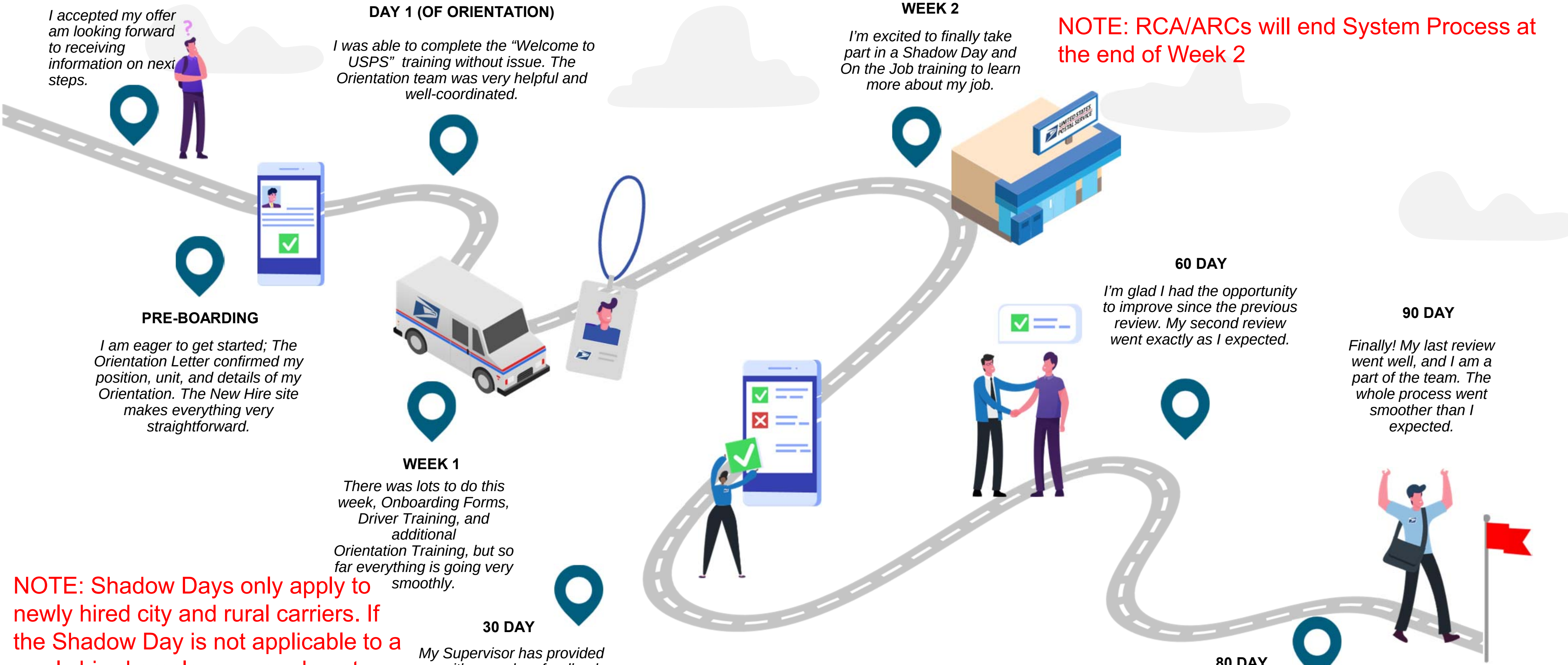
DAY 1 (OF ORIENTATION)

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.

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.

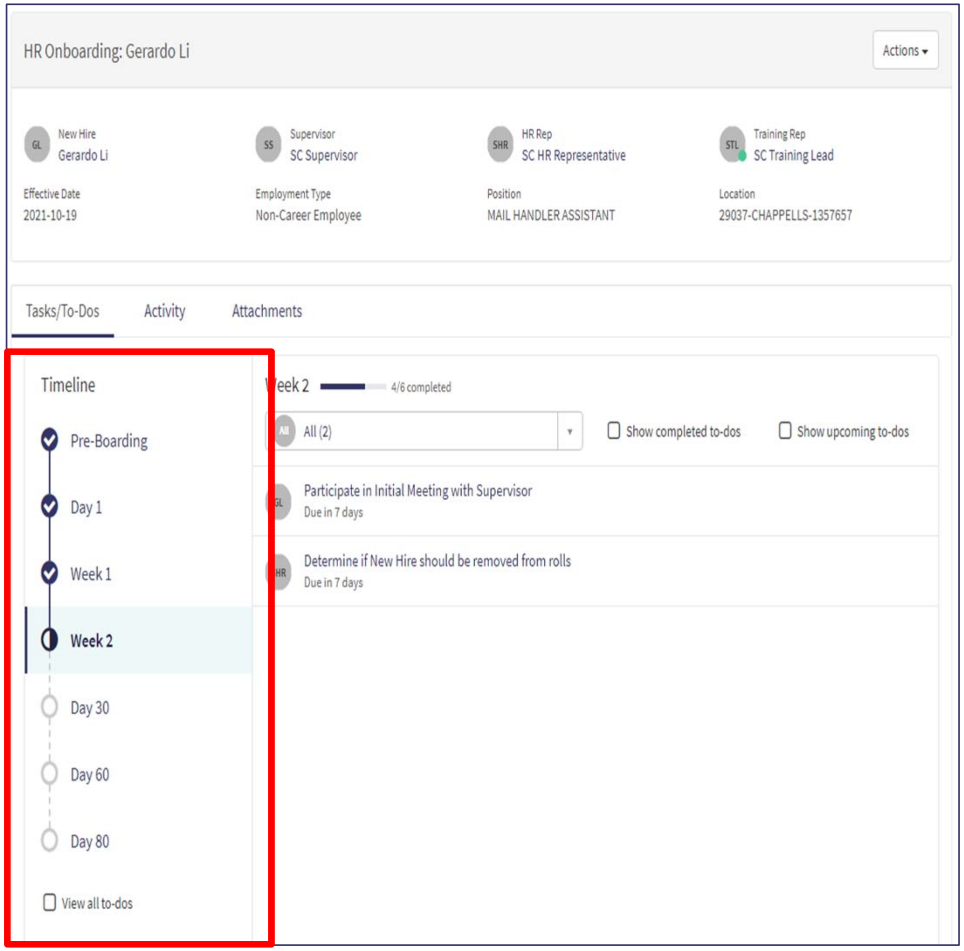
NOTE: Shadow Days only apply to newly hired city and rural carriers. If the Shadow Day is not applicable to a newly hired employee, you do not need to complete the action in the HR Onboarding Pilot System

Workflow – Activity Sets

Activity Sets:

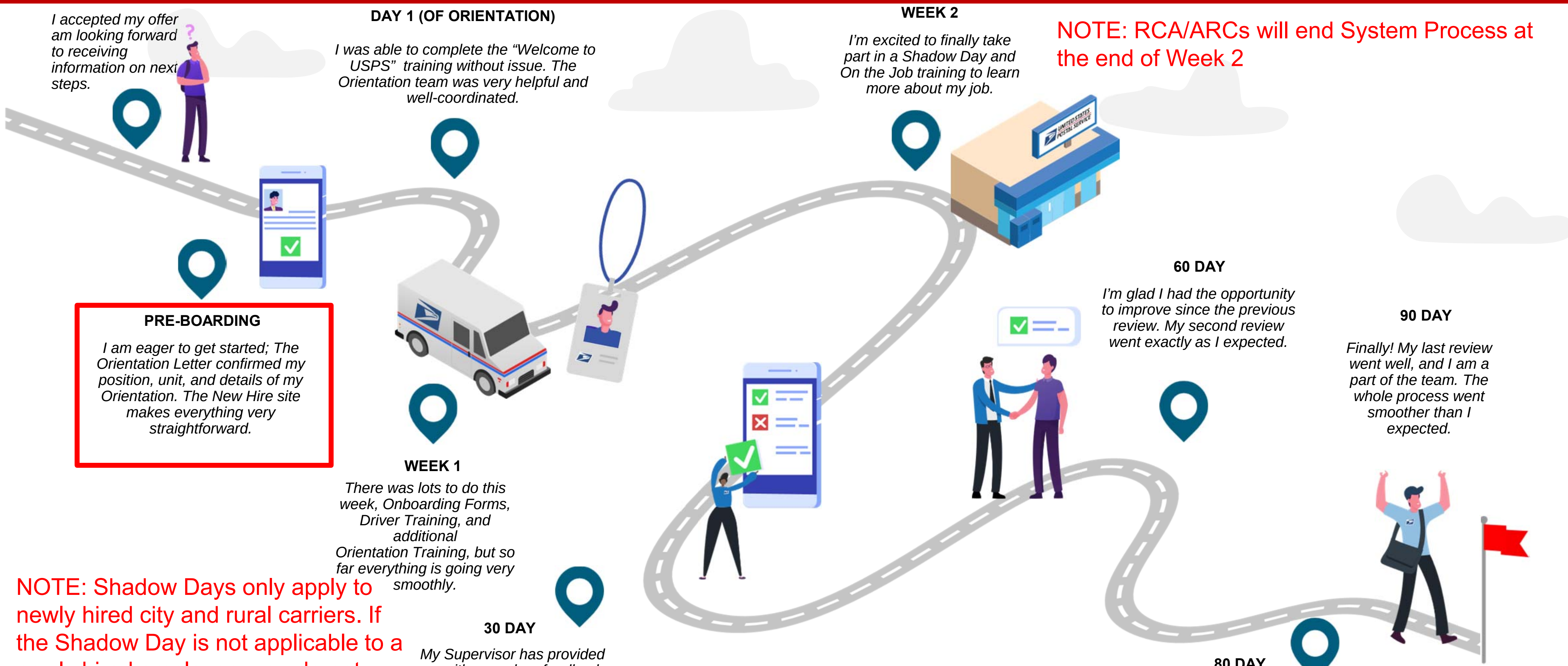
Depict the stages of the onboarding process, they can include:

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



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

Project Overview - USPS HR Onboarding Pilot Journey Map



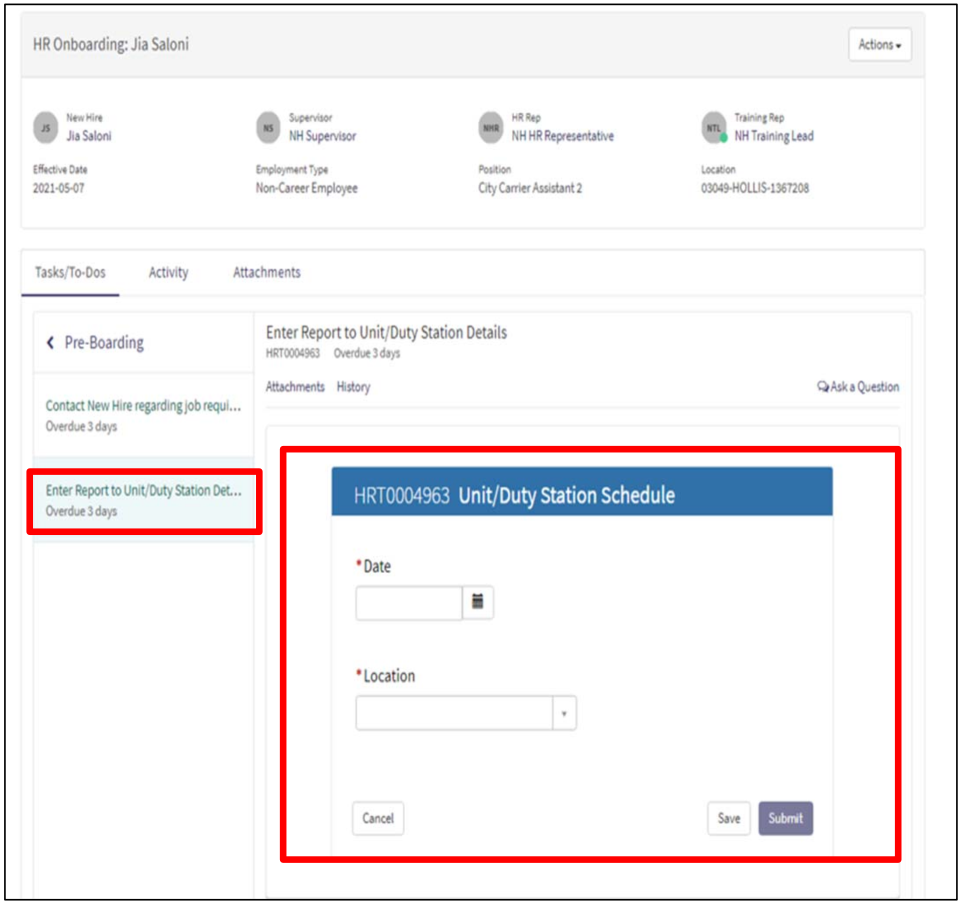
NOTE: RCA/ARCs will end System Process at the end of Week 2

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

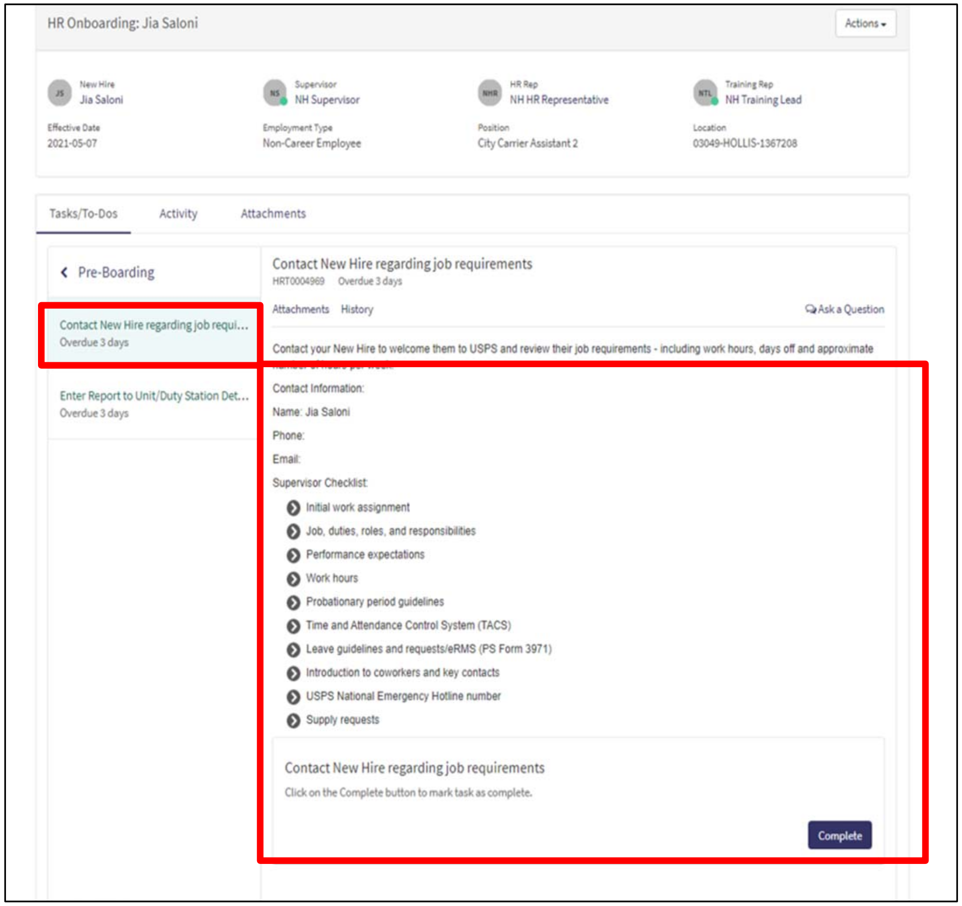


NOTE: *If the task is completed prior to the New Hire's effective date, a system generated email containing the relevant information will be sent. However, if the task is completed past the New Hire's effective date, no system generated email will be sent to the New Hire and it will be the responsibility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

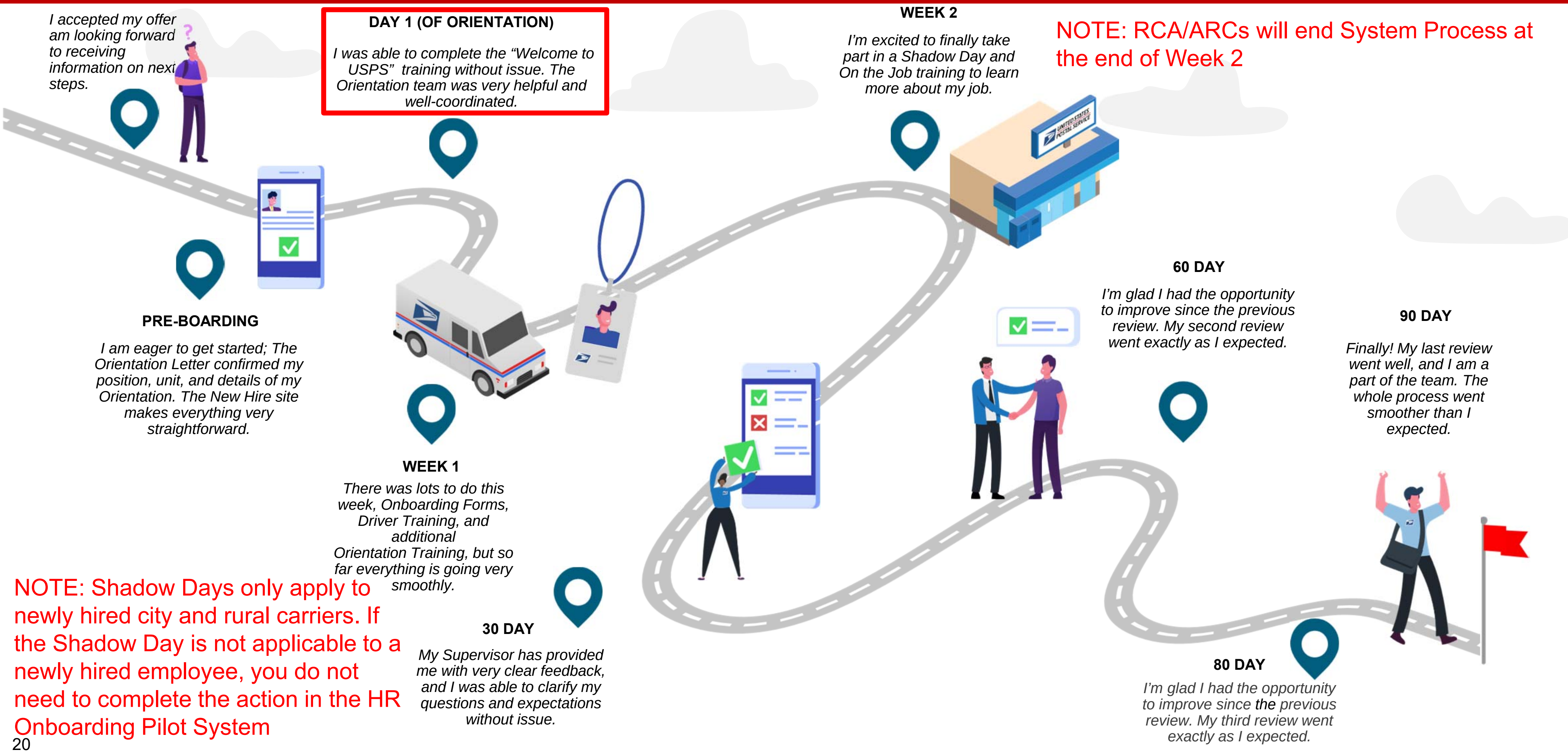
Workflow – Preboarding Tasks

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



Project Overview - USPS HR Onboarding Pilot Journey Map



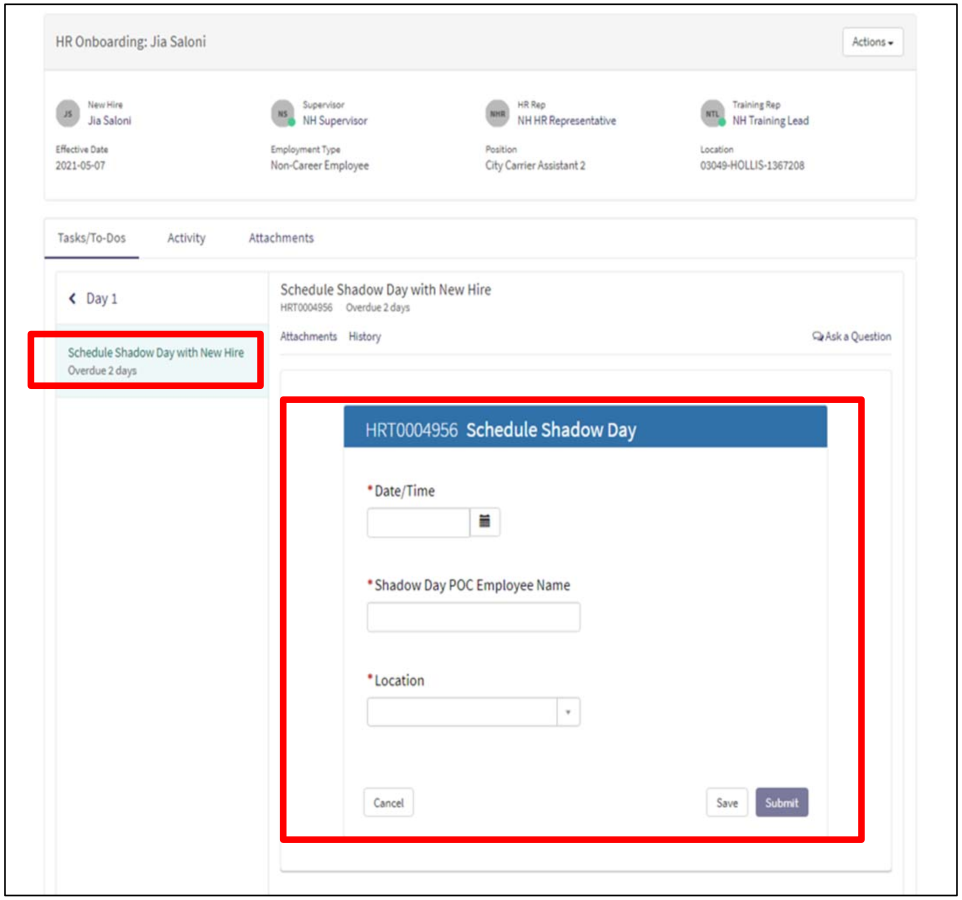
NOTE: RCA/ARCs will end System Process at the end of Week 2

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

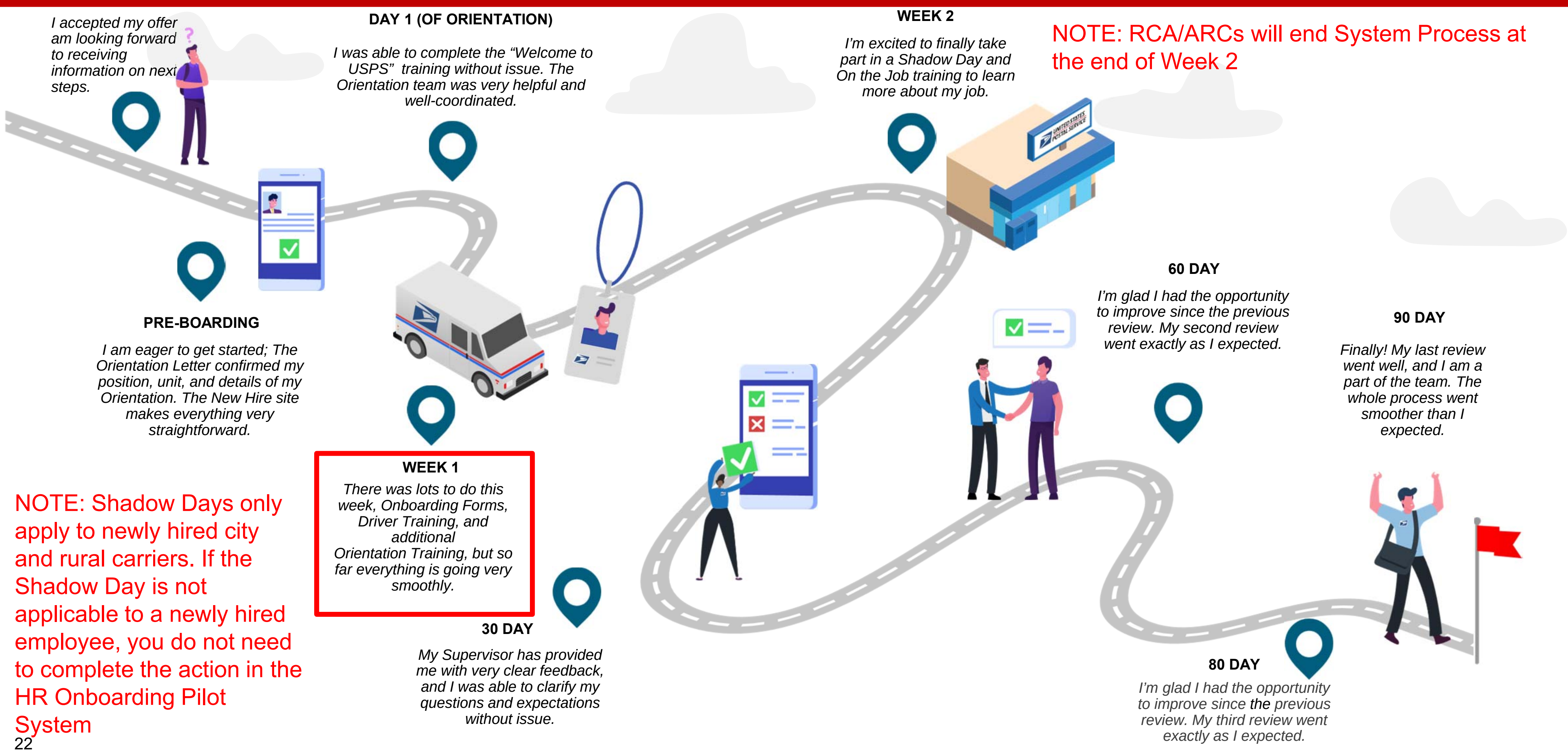
Schedule Shadow Day:

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*

Project Overview - USPS HR Onboarding Pilot Journey Map



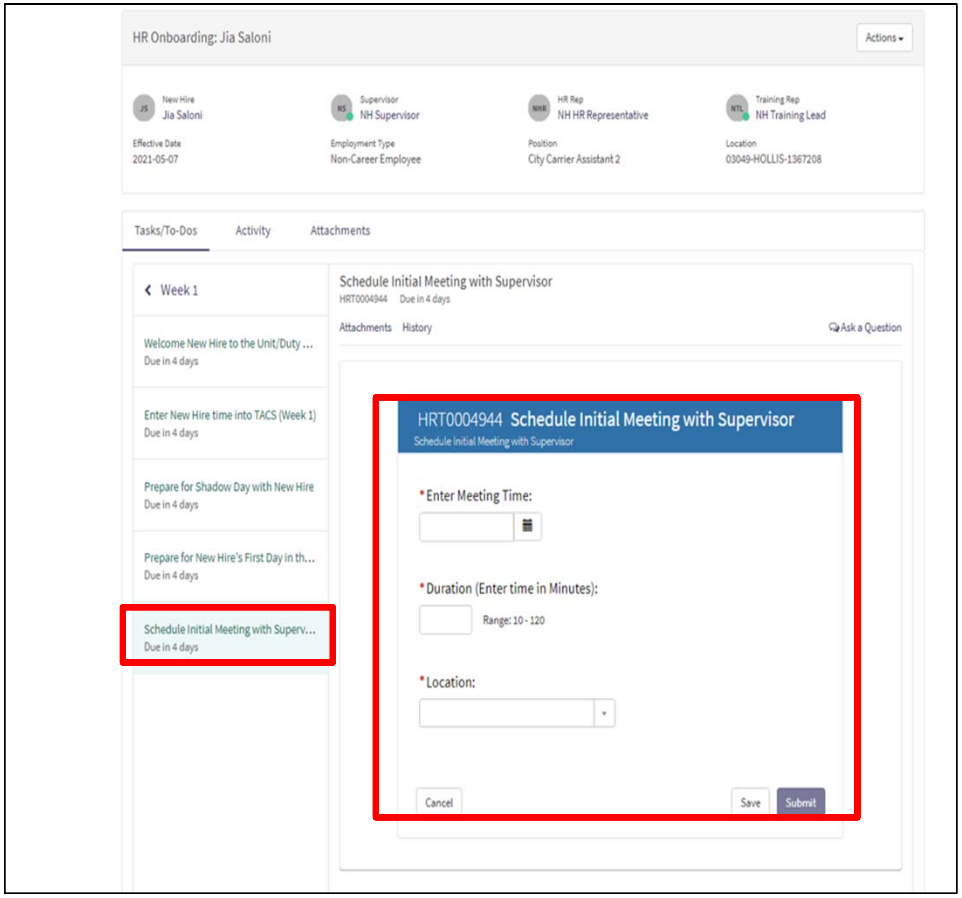
NOTE: RCA/ARCs will end System Process at the end of Week 2

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:

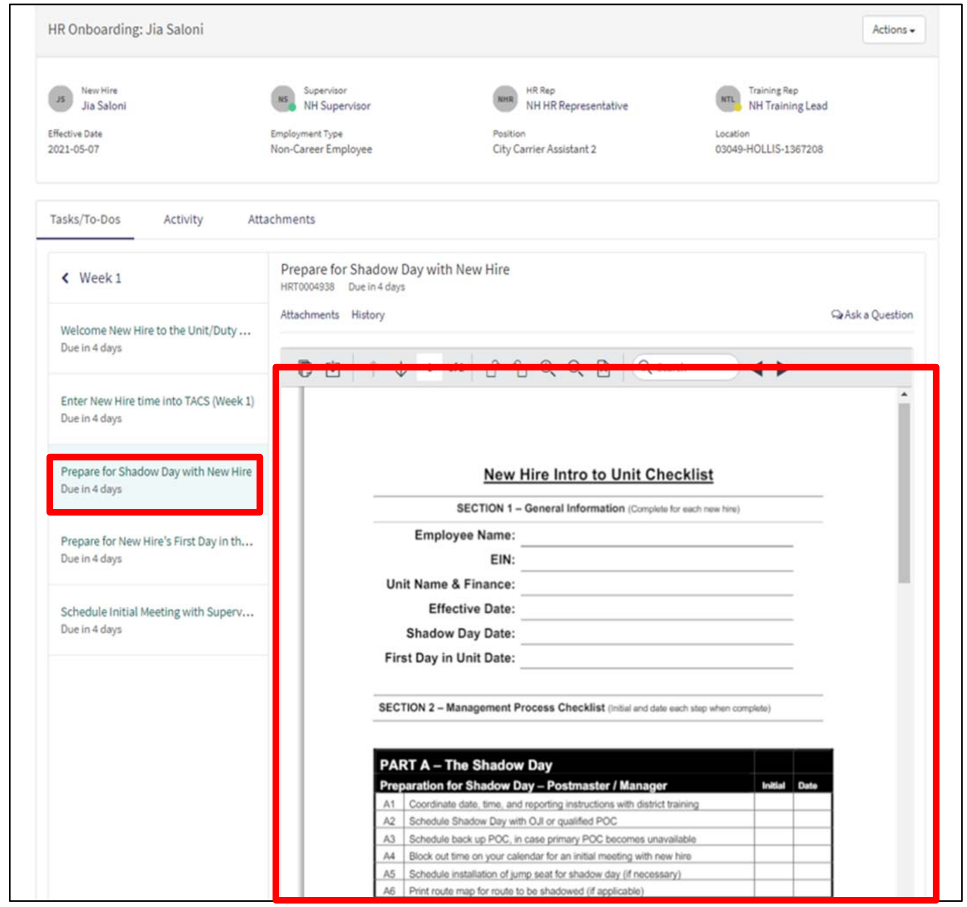
Supervisors will use this task to schedule the date a New Hire has their initial probationary meeting with the Supervisor. Once the task is marked complete by the Supervisor, an email is sent to the New Hire with the information needed for the meeting including the date and location of the meeting as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

Shadow Day Checklist:

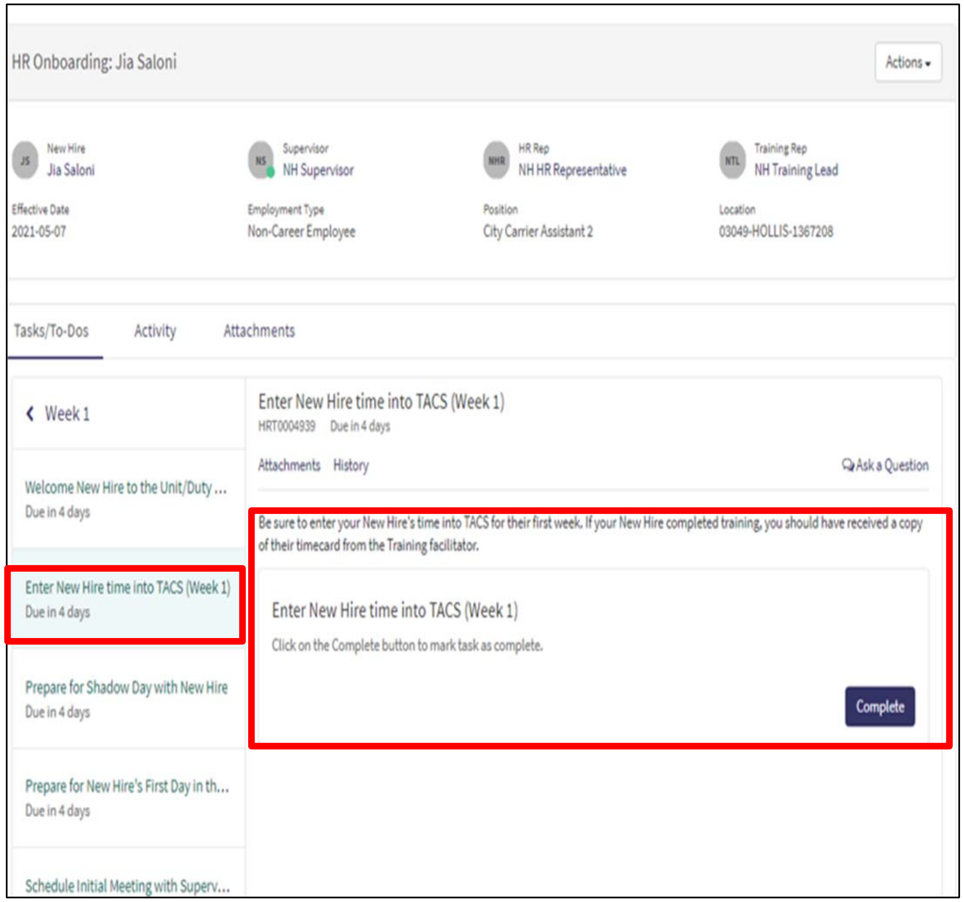
If applicable Supervisors can use this checklist to view how they can prepare for the New Hire's Shadow Day. Supervisors can download the checklist displayed in the task



Workflow – Week 1 Tasks

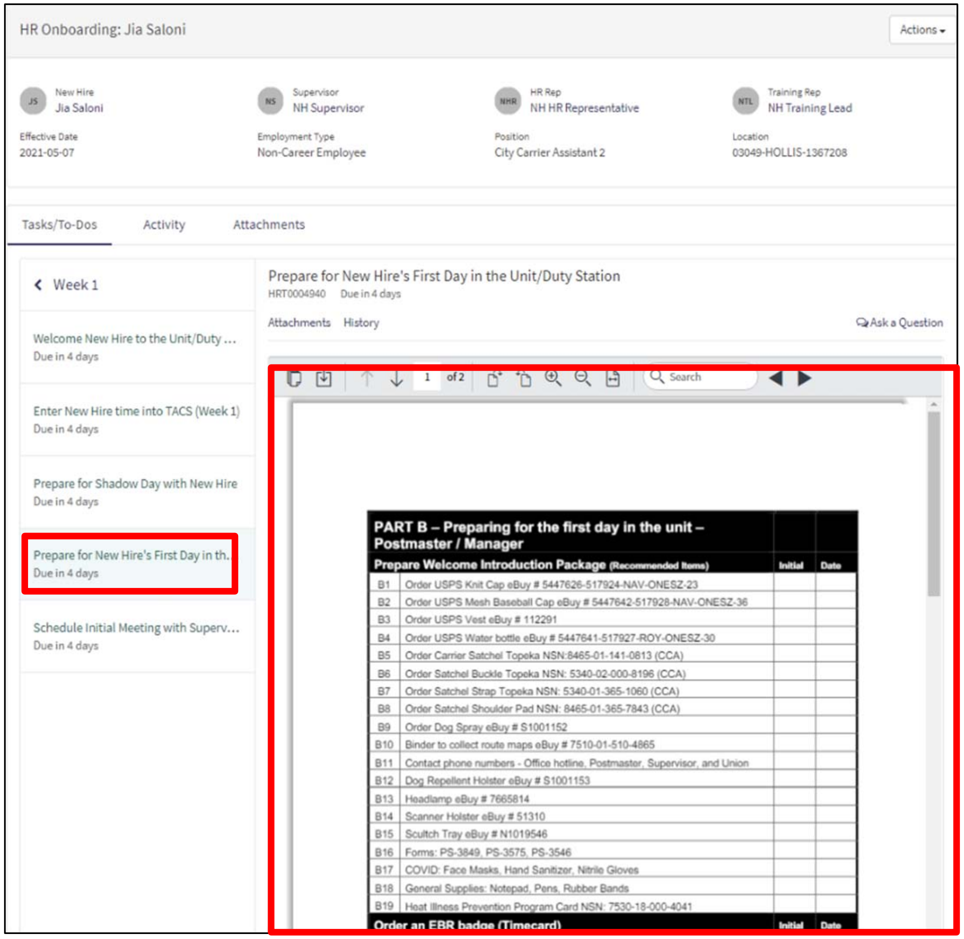
Enter Time in TACs:

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



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

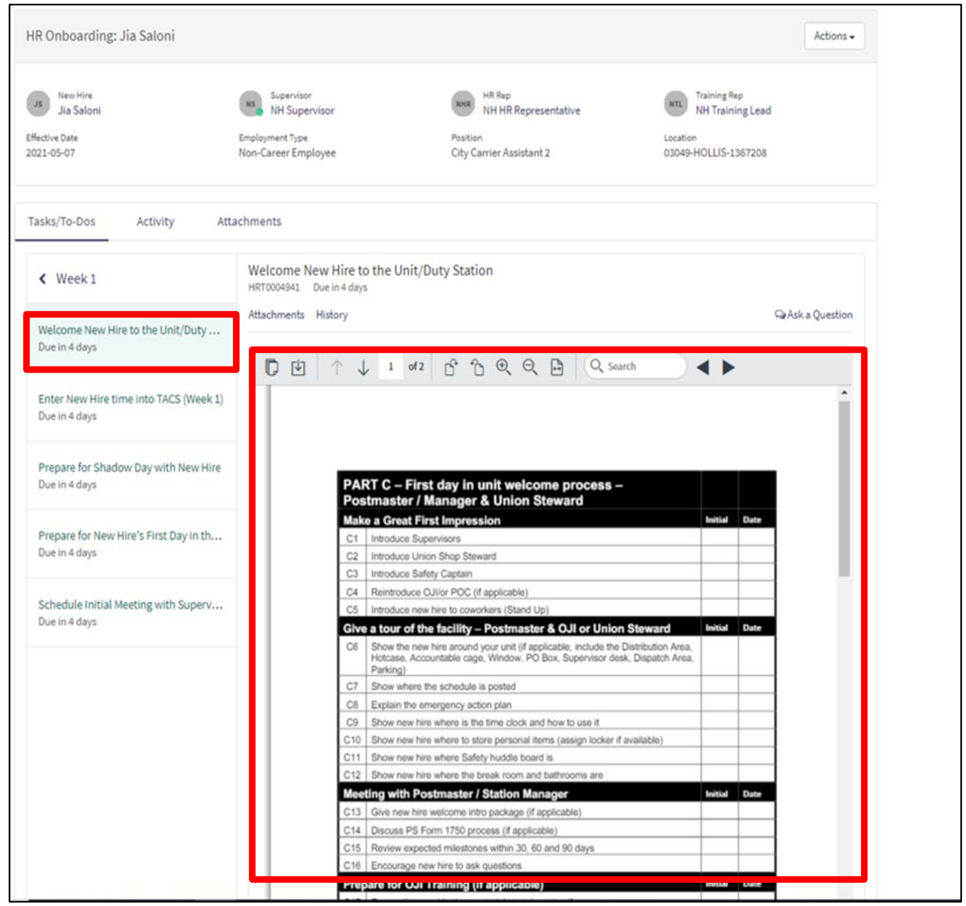
A checklist is available for Supervisors through this task outlining how they can prepare for the New Hire's first day at Unit/Duty Station. Supervisors can download the checklist displayed in the task



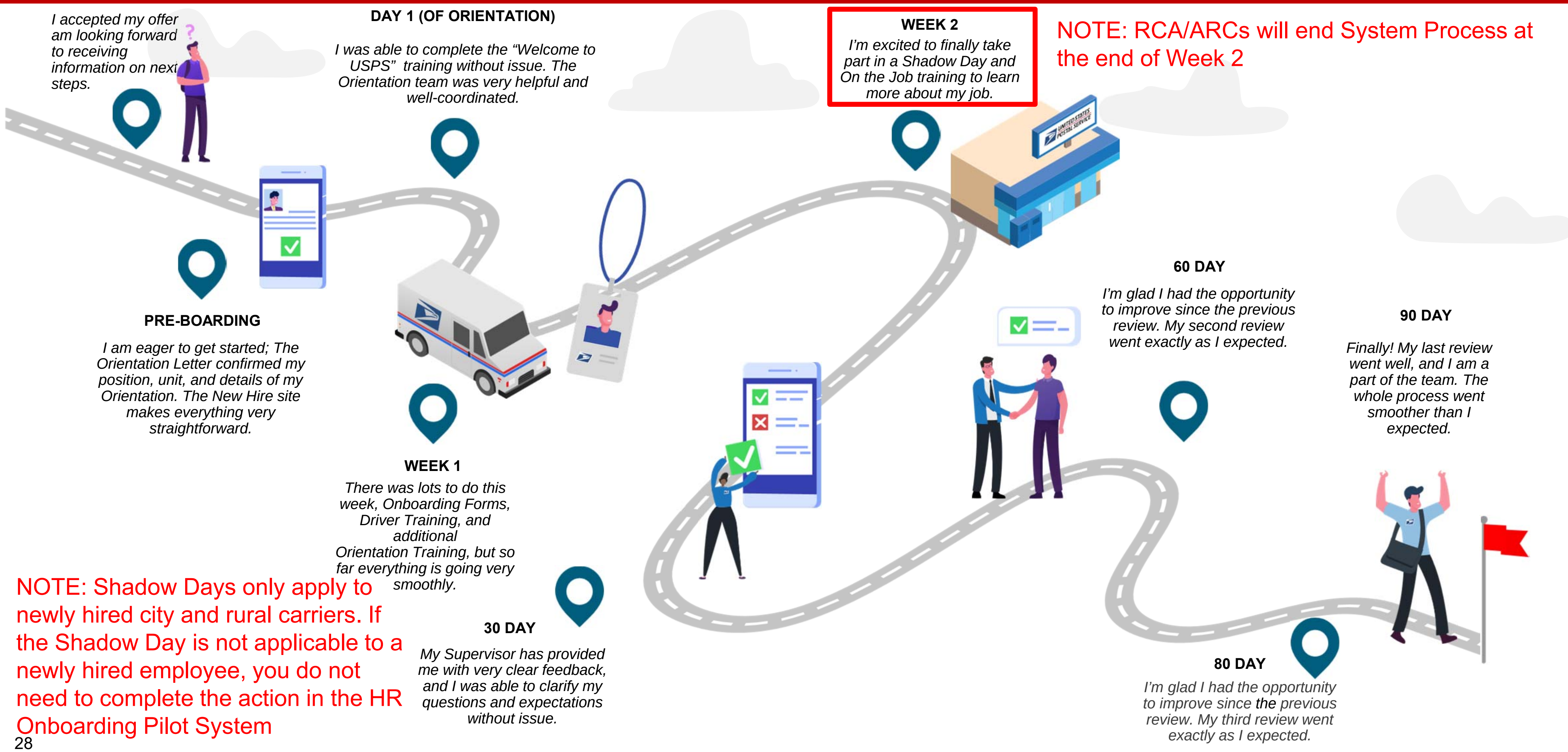
PART B – Preparing for the first day in the unit – Postmaster / Manager			
Prepare Welcome Introduction Package (Recommended Items)		Initial	Date
B1	Order USPS Knit Cap eBuy # 5447626-517924-NAV-ONESZ-23		
B2	Order USPS Mesh Baseball Cap eBuy # 5447642-517928-NAV-ONESZ-36		
B3	Order USPS Vest eBuy # 112291		
B4	Order USPS Water bottle eBuy # 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: 5340-01-365-1060 (CCA)		
B8	Order Satchel Shoulder Pad NSN: 8465-01-365-7843 (CCA)		
B9	Order Dog Spray eBuy # S1001152		
B10	Binder to collect route maps eBuy # 7510-01-510-4865		
B11	Contact phone numbers - Office hotline, Postmaster, Supervisor, and Union		
B12	Dog Repellent Holster eBuy # S1001153		
B13	Headlamp eBuy # 7665814		
B14	Scanner Holster eBuy # 51310		
B15	Scultch Tray eBuy # 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 EBR badge (Timecard)		Initial	Date

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



Project Overview - USPS HR Onboarding Pilot Journey Map



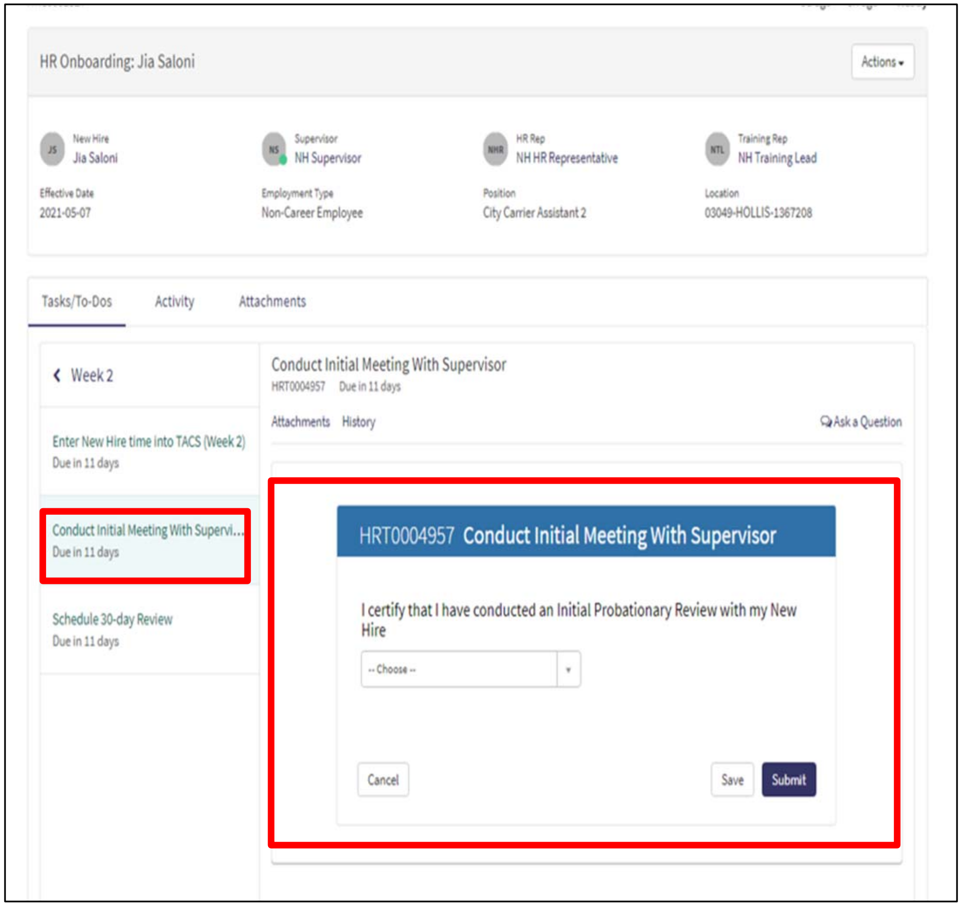
NOTE: RCA/ARCs will end System Process at the end of Week 2

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:

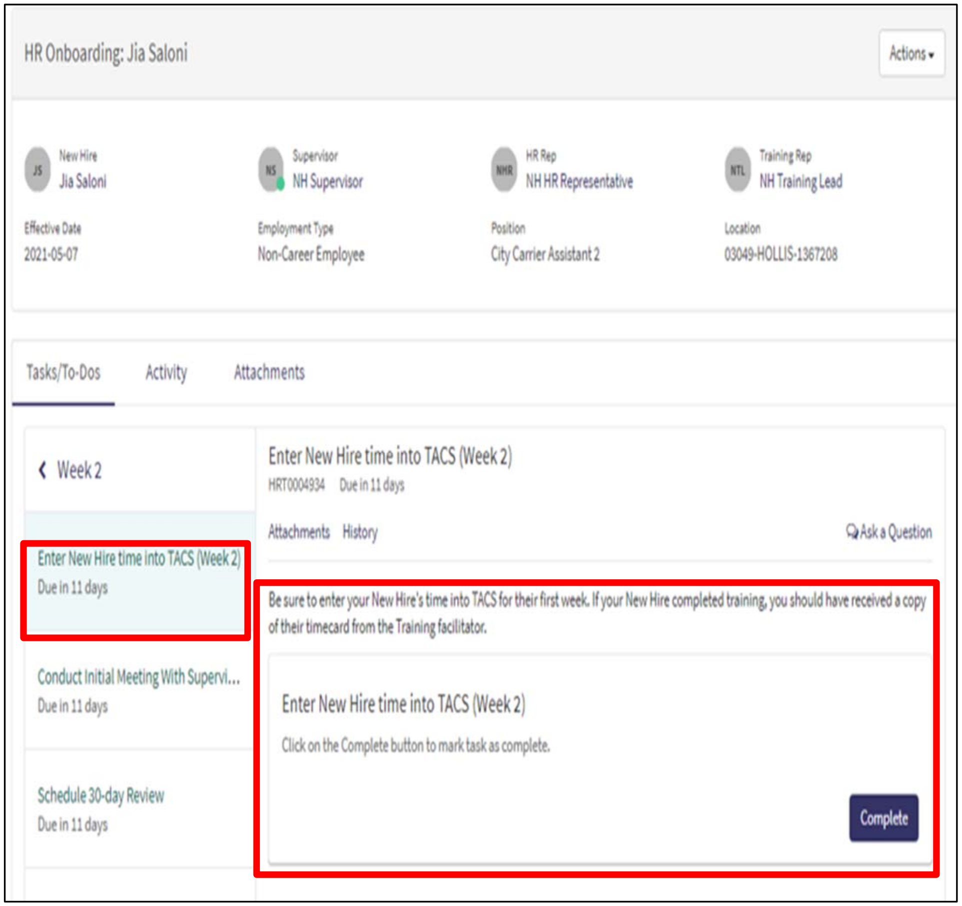
Through this task Supervisors confirm they have conducted the initial probationary meeting with the New Hire.



Workflow – Week 2 Tasks

Enter Time in TACs:

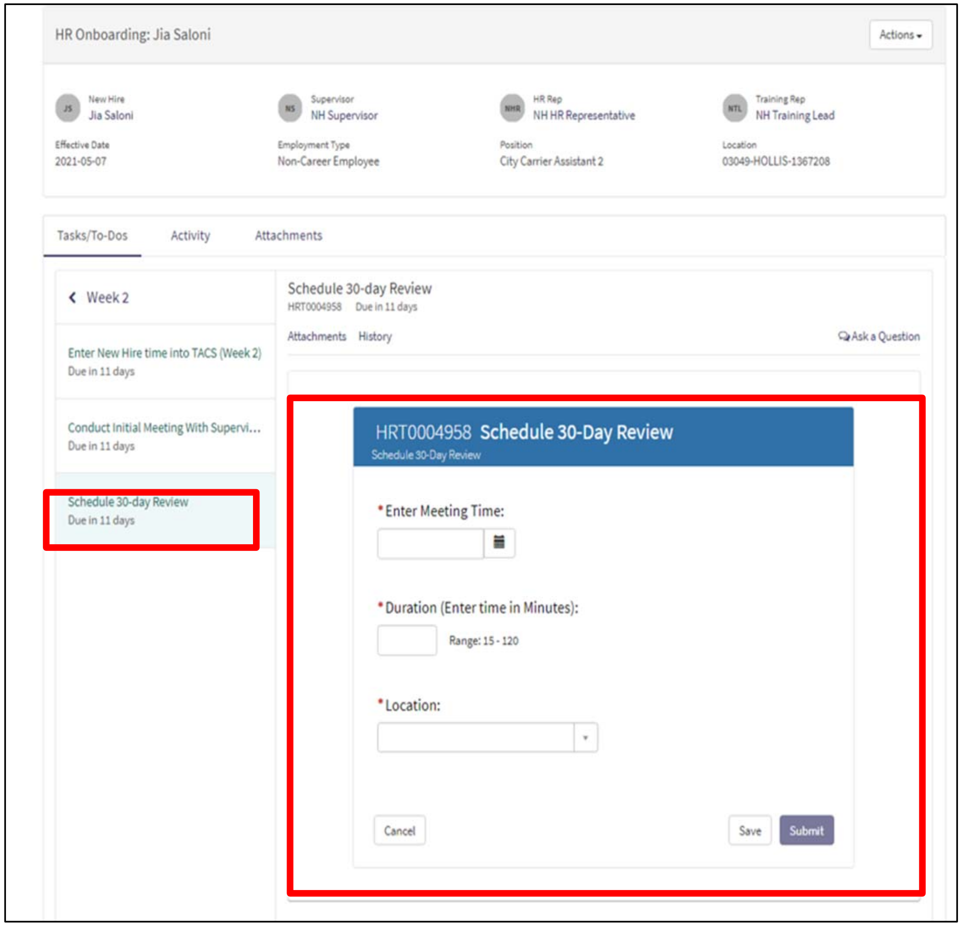
This task is a reminder for Supervisor’s to enter the New Hire’s time in the Time and Attendance System (TACs) outside of the HR Onboarding Pilot system.



Workflow – Week 2 Tasks

Scheduling 30-Day Review:

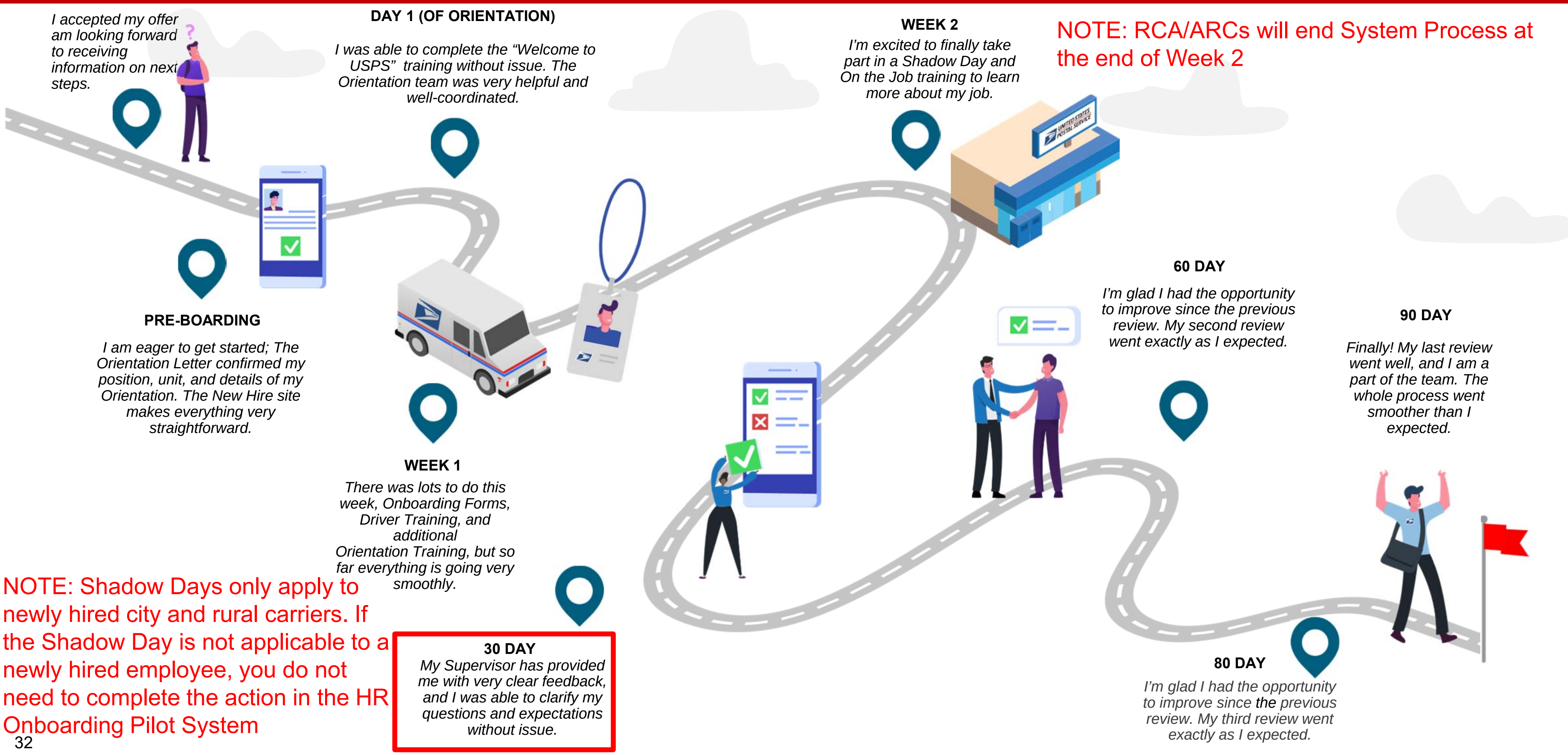
Supervisors will use this task to schedule the 30-day evaluation for the New Hire.



***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.

Project Overview - USPS HR Onboarding Pilot Journey Map



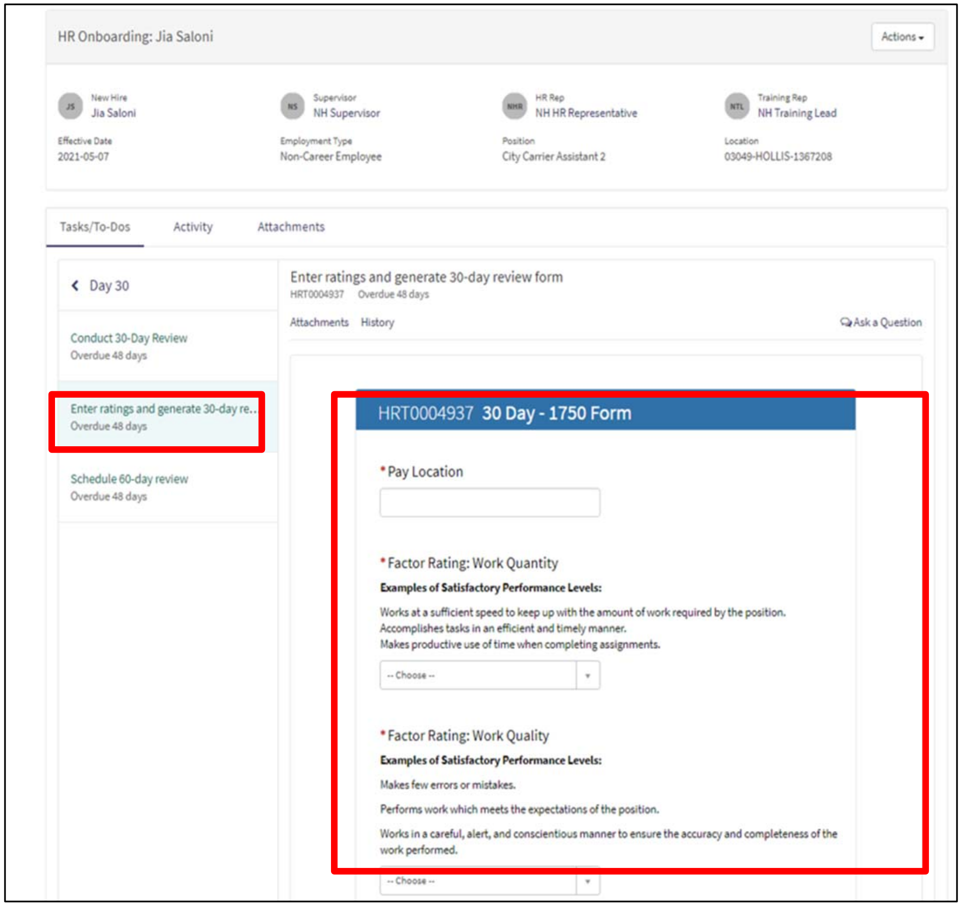
NOTE: RCA/ARCs will end System Process at the end of Week 2

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.*

Workflow – Day 30

Populated from the Enter Ratings Task

UNITED STATES POSTAL SERVICE

Employee Evaluation and/or Probationary Report

(See Instructions on Reverse)

1. Employee's Name *(First, MI, Last)*			2. Employee Social Security Number	
Jia Saloni			061359902	
3. Title		4. Pay Location	5. Appointment Date	6. Date Probationary Period Ends
City Carrier Assistant 2		123	2021-05-07	2021-08-05

7a. Complete 30-Day Report By:	8a. Complete 60-Day Report By:	9a. Complete 80-Day Report By:	10a. Complete Year End Report By:
2021-06-05	2021-07-05	2021-07-25	2022-05-06
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 O B O C S D O E S F S	A__ B__ C__ D__ E__ F__	A__ B__ C__ D__ E__ F__	A__ B__ C__ D__ E__ F__
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)*

Populated from the New Hire's HR Profile

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)*.

O = *OUTSTANDING* S = *SATISFACTORY* U = *UNACCEPTABLE* NO = *NOT OBSERVED*

Factor	Examples of Satisfactory Performance Levels
A. Work Quantity	■ 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.
B. Work Quality	■ 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.
C. Dependability	■ Completes work assignments without unnecessary supervision. ■ Takes responsibility for completing his/her own work. ■ Reports to work on time. ■ Demonstrates satisfactory attendence.
D. Work Relations	■ Maintains positive working relationships with others. ■ Works harmoniously with others in getting the work done. ■ Cooperates well with co-workers, supervisors, and others with whom he/she comes into contact.
E. Work Methods	■ Handles equipment and/or work materials in an appropriate manner. ■ Consistently observes proper safety rules and practices. ■ Understands and follows oral and/or written instructions.
F. Personal Conduct	■ Conducts himself/herself in a manner appropriate to the work setting. ■ Maintains an appropriate appearance for the position. ■ Demonstrates a positive approach toward work, co-workers, and supervisors. ■ Demonstrates a willingness to handle all assignments. ■ Demonstrates flexibility in moving from one task to another as needed.

Have Expectations Been Jointly Discussed?
☒ Yes ☐ No Initials: ______ *(Supervisor)* ______ *(Employee)*

Would You Recommend This Person for Retention or Rehire?
☒ Yes ☐ No Initials: ______ *(Supervisor)*

Please Explain or Provide Additional Comments Below:

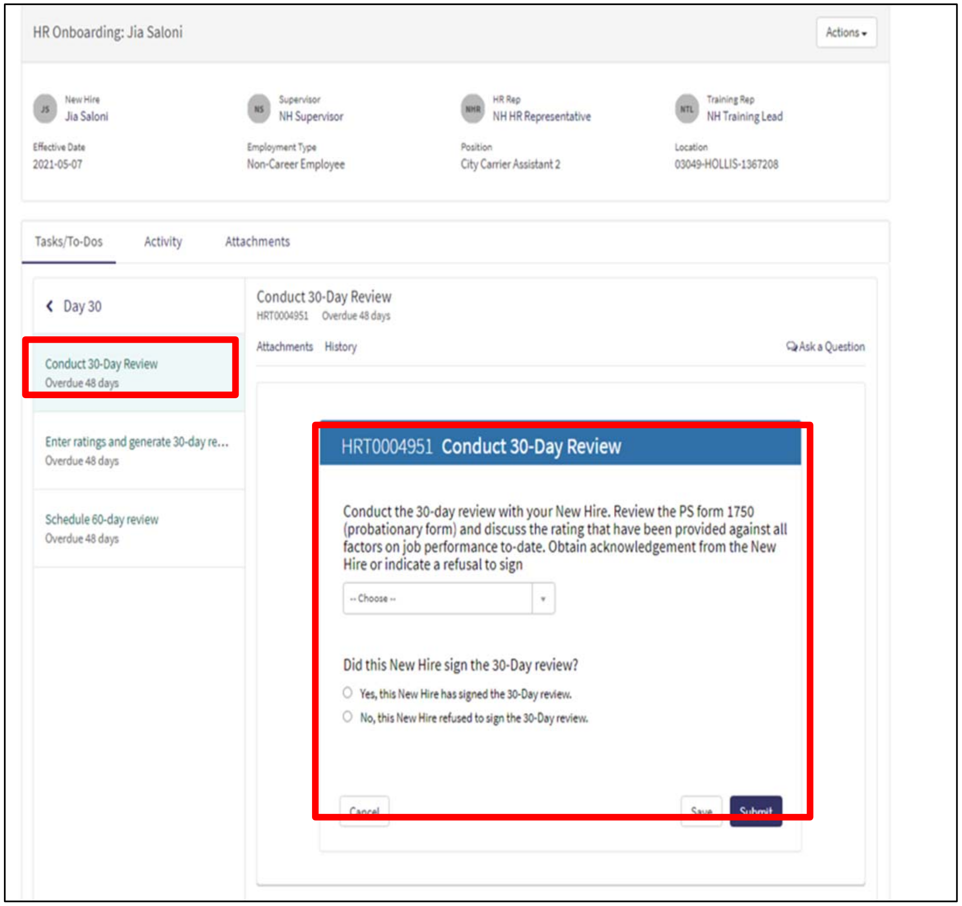
PS Form **1750**, August 1994 **1 - Forward to Designated Postal Official**

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:

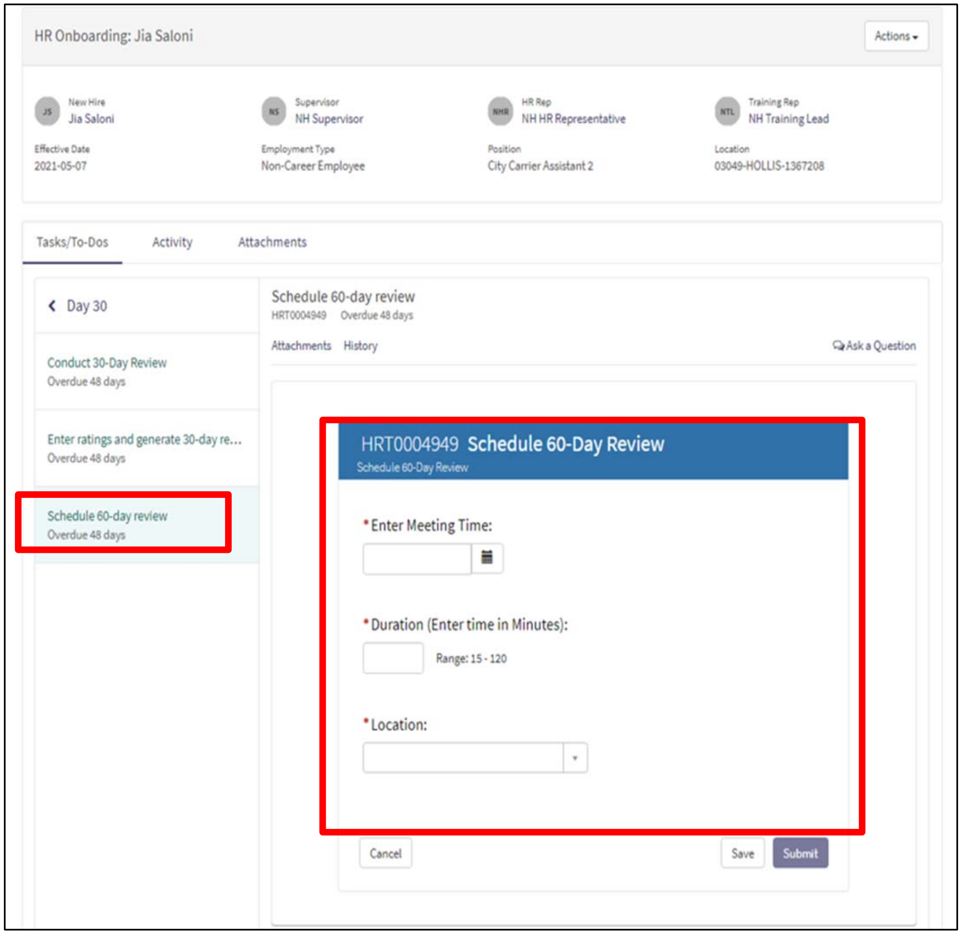
Through this task Supervisors confirm they have conducted the 30-day probationary meeting with the New Hire.



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.*

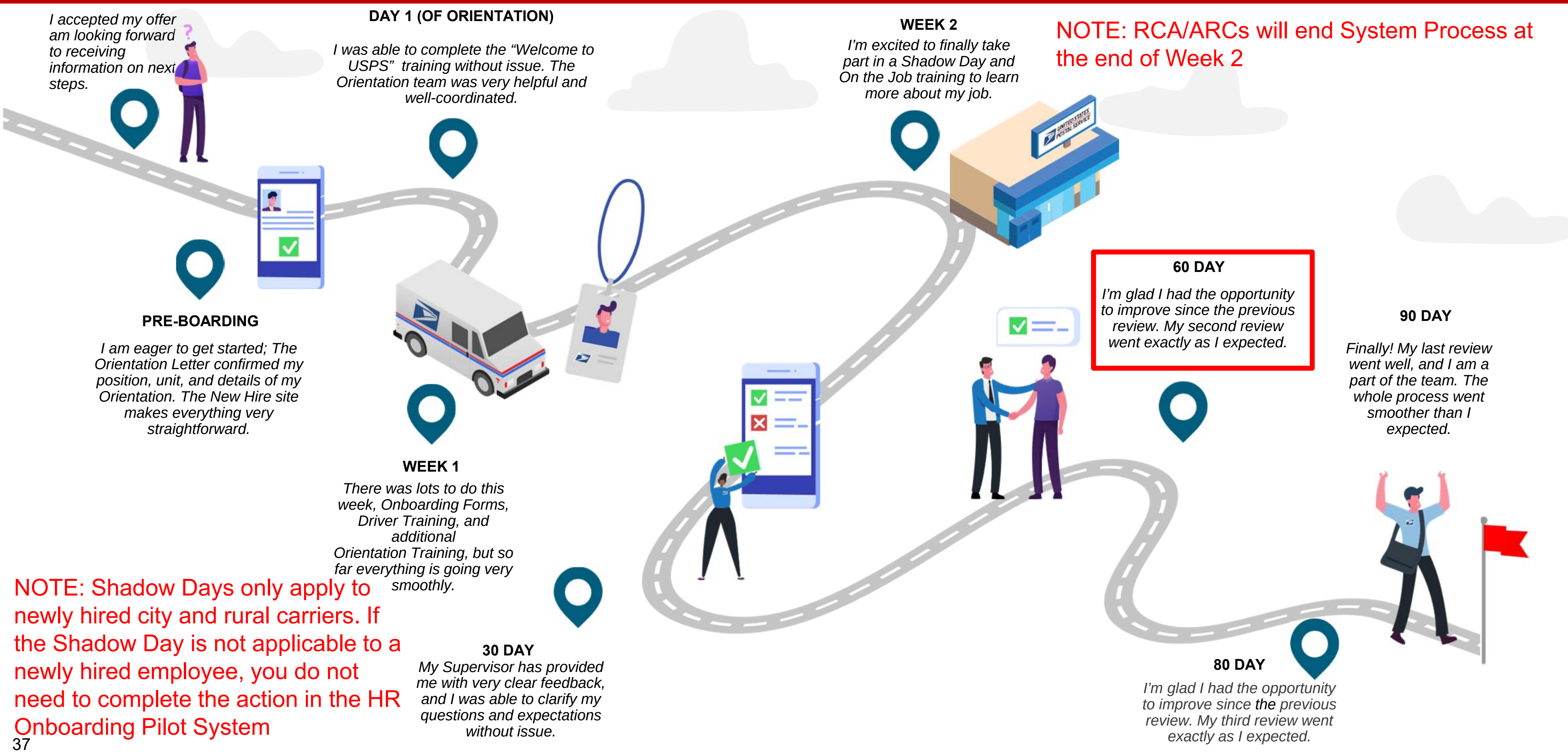
Schedule 60-Day Review:

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.*

Project Overview - USPS HR Onboarding Pilot Journey Map

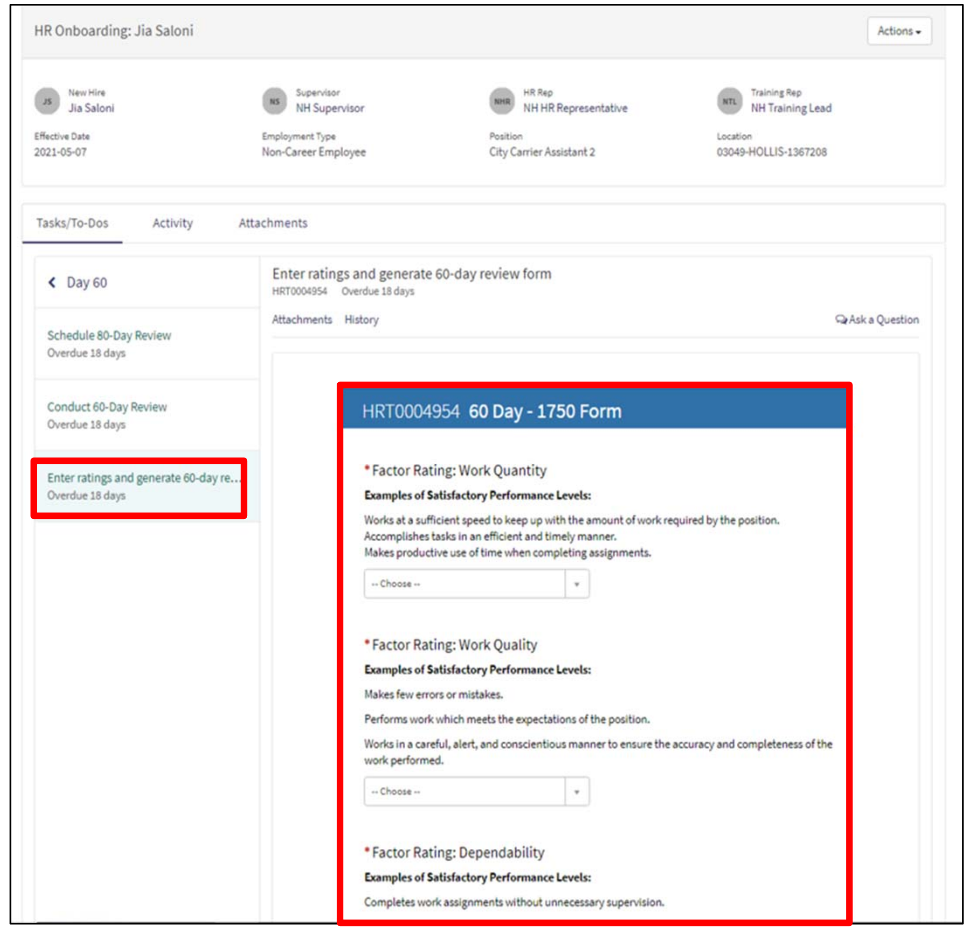


NOTE: RCA/ARCs will end System Process at the end of Week 2

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

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.*

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)* Jia Saloni		2. Employee Social Security Number 061359902	
3. Title City Carrier Assistant 2	4. Pay Location 123	5. Appointment Date 2021-05-07	6. Date Probationary Period Ends 2021-08-05
7a. Complete 30-Day Report By: 2021-06-05	8a. Complete 60-Day Report By: 2021-07-05	9a. Complete 80-Day Report By: 2021-07-25	10a. Complete Year End Report By: 2022-05-06
7b. Enter Factor Rating (O, S, U, NO) A O B O C S D O E S F S	8b. Enter Factor Rating (O, S, U, NO) A S B O C S D O E O F O	9b. Enter Factor Rating (O, S, U, NO) A__ B__ C__ D__ E__ F__	10b. Enter Factor Rating (O, S, U, NO) A__ B__ C__ D__ E__ F__
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)*	

List[illegible]ow are the factors on which you are to evaluate the employee. Next to each factor are examples of behaviors that would describe [illegible]mance at the *SATISFACTORY* level. These are provided as reference points for evaluating performance. Performance substantially above the [illegible]formance 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)*.

O = *OUTSTANDING* S = *SATISFACTORY* U = *UNACCEPTABLE* NO = *NOT OBSERVED*

Factor	Examples of Satisfactory Performance Levels
A. Work Quantity	■ 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.
B. Work Quality	■ 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.
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D. Work Relations	■ Maintains positive working relationships with others. ■ Works harmoniously with others in getting the work done. ■ Cooperates well with co-workers, supervisors, and others with whom he/she comes into contact.
E. Work Methods	■ Handles equipment and/or work materials in an appropriate manner. ■ Consistently observes proper safety rules and practices. ■ Understands and follows oral and/or written instructions.
F. Personal Conduct	■ Conducts himself/herself in a manner appropriate to the work setting. ■ Maintains an appropriate appearance for the position. ■ Demonstrates a positive approach toward work, co-workers, and supervisors. ■ Demonstrates a willingness to handle all assignments. ■ Demonstrates flexibility in moving from one task to another as needed.

Have Expectations Been Jointly Discussed? ☒ Yes ☐ No Initials: ______ *(Supervisor)* ______ *(Employee)*

Would You Recommend This Person for Retention or Rehire? ☒ Yes ☐ No Initials: ______ *(Supervisor)*

Please Explain or Provide Additional Comments Below:

PS Form **1750**, August 1994 **1 - Forward to Designated Postal Official**

Populated from the Enter Ratings Task

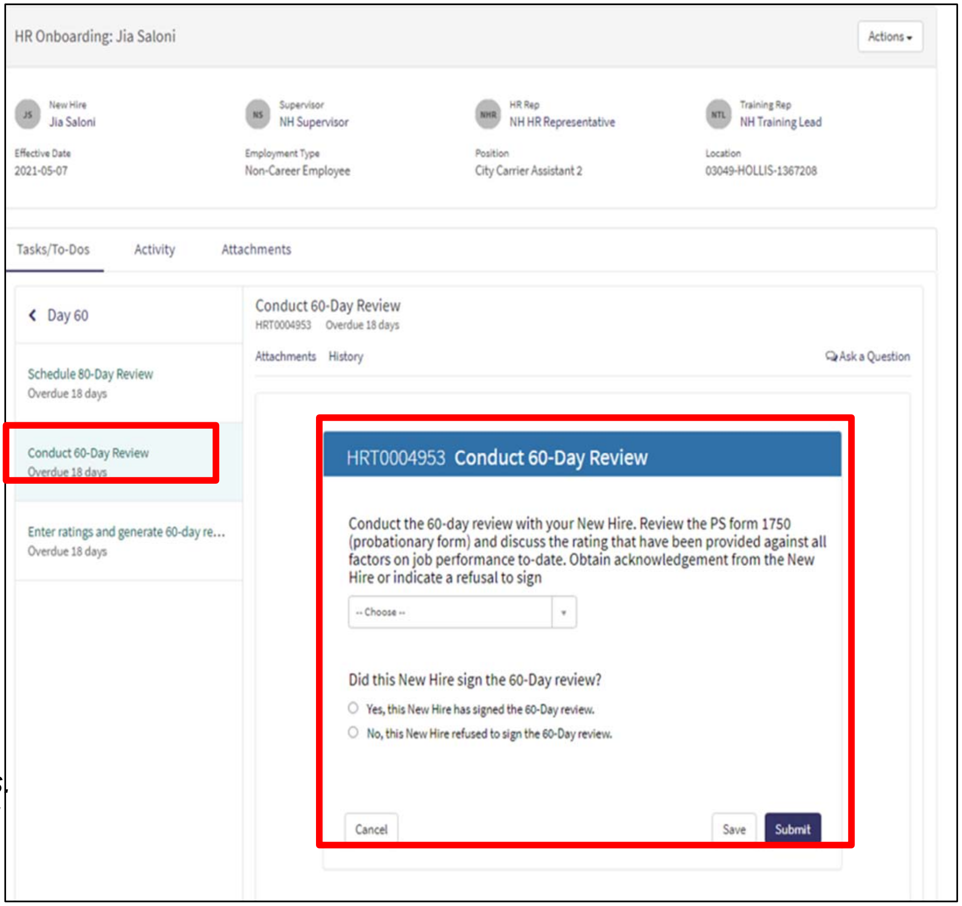
Populated from the New Hire's HR Profile

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.

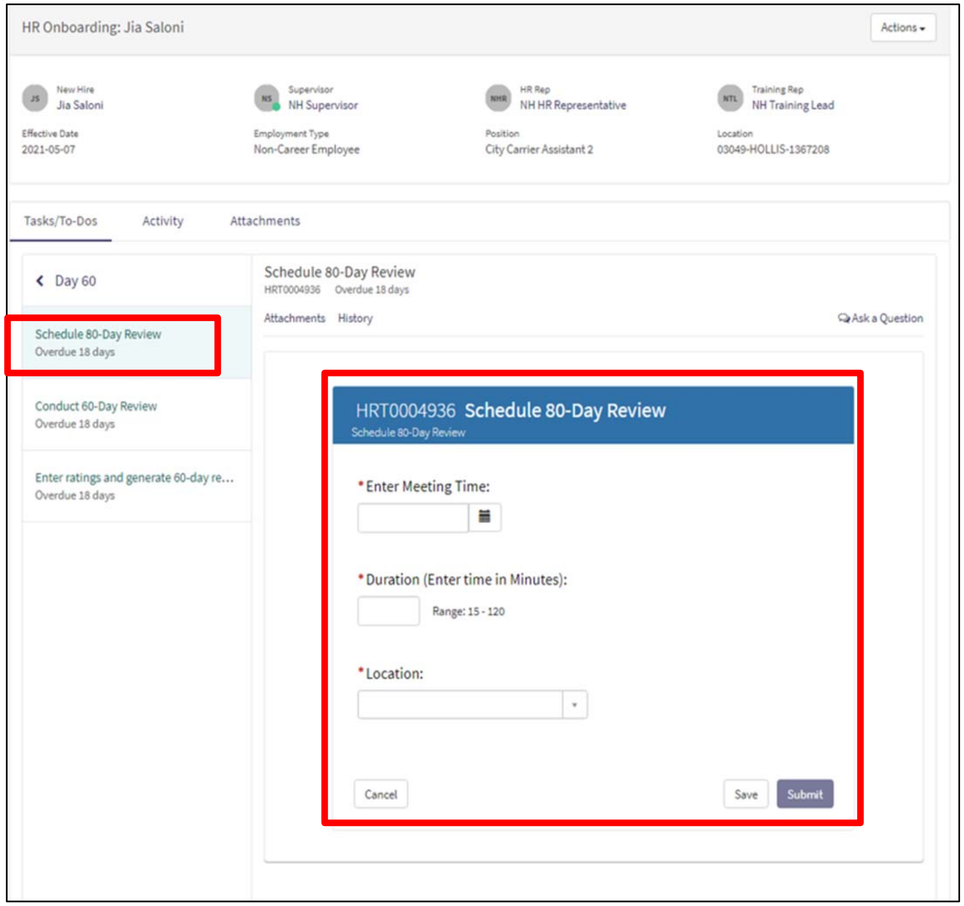


NOTE: *RCAs/ARCs will be excluded from the scheduling and completion of automated PS Form 1750 evaluations at the 30, 60, and 80-Day reviews. They will continue to be evaluated using the same process used today and their reviews will not be captured within the HR Onboarding Pilot tool.*

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.*

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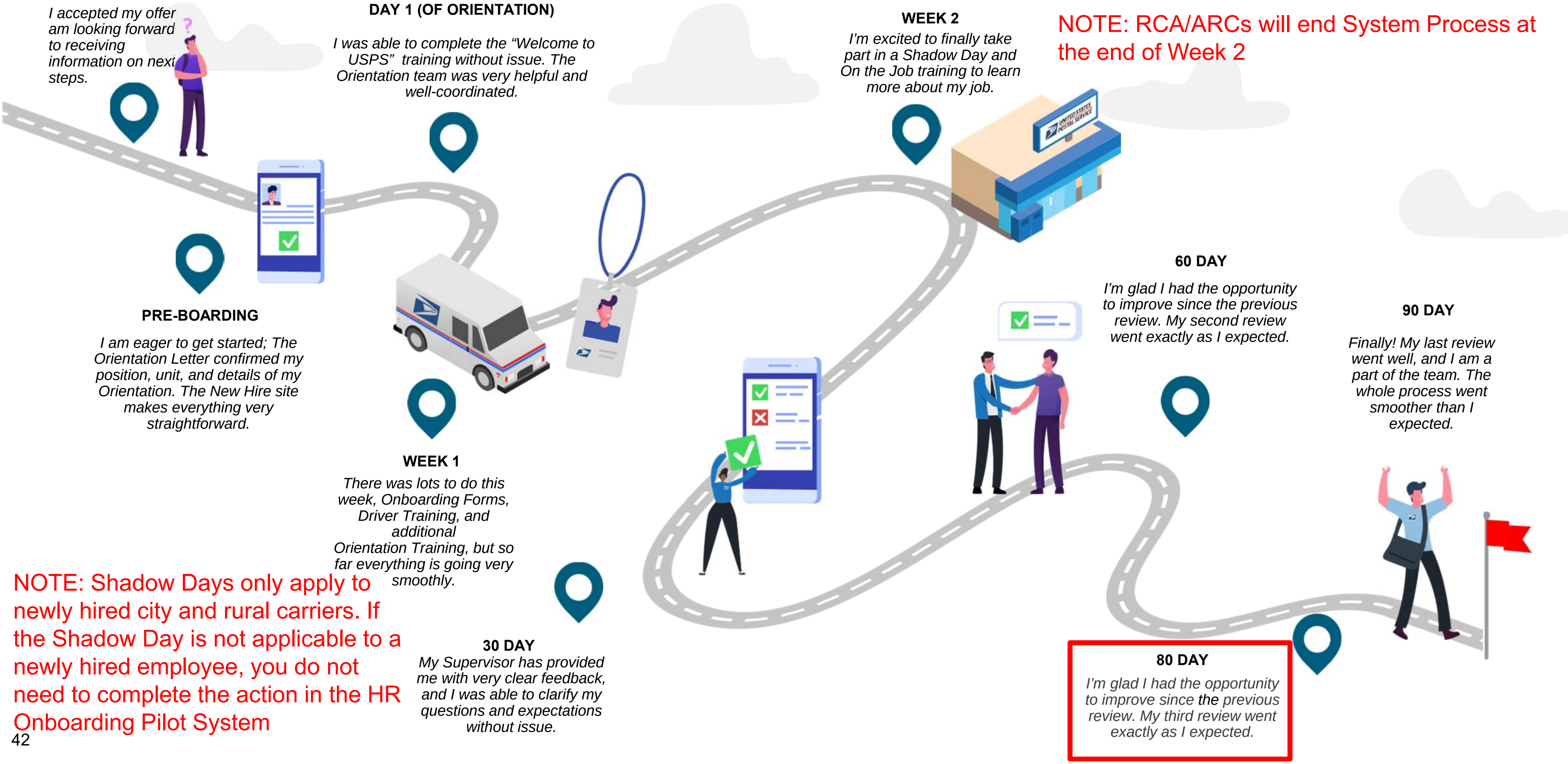
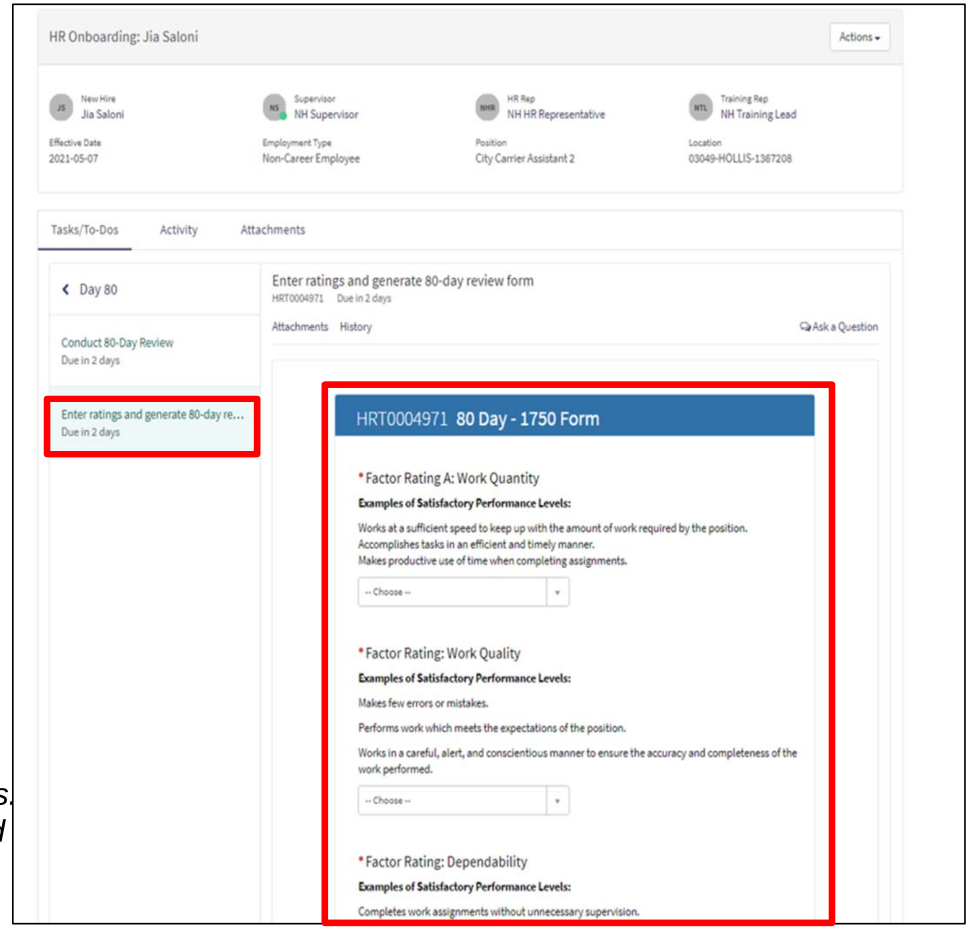


Workflow – Day 80 Tasks

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.



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Workflow – Day 80 Tasks

UNITED STATES POSTAL SERVICE

Employee Evaluation and/or Probationary Report
(See Instructions on Reverse)

1. Employee's Name *(First, MI, Last)* Jia Saloni			2. Employee Social Security Number 061359902
3. Title City Carrier Assistant 2	4. Pay Location 123	5. Appointment Date 2021-05-07	6. Date Probationary Period Ends 2021-08-05
7a. Complete 30-Day Report By: 2021-06-05	8a. Complete 60-Day Report By: 2021-07-05	9a. Complete 80-Day Report By: 2021-07-25	10a. Complete Year End Report By: 2022-05-06
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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)*	

Listed below are the fact[illegible] which you are to evaluate the employee. Next to each factor are examples of behaviors that would describe performance at the [illegible]ACTORY level. These are provided as reference points for evaluating performance. Performance substantially above the performance [illegible] at the *SATISFACTORY* level would be rated *OUTSTANDING*, while performance substantially below the *SATISFACTORY* level would [illegible]*NACCEPTABLE*. Please indicate your rating of *OUTSTANDING*, *SATISFACTORY*, or *UNACCEPTABLE* for each factor by entering [illegible]ate 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 [illegible] is not relevant to the position which you are rating, enter "NO" *(NOT OBSERVED)*.

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Have Expectations Been Jointly Discussed?
☒ Yes ☐ No Initials: ____ *(Supervisor)* ____ *(Employee)*

Would You Recommend This Person for Retention or Rehire?
☒ Yes ☐ No Initials: ____ *(Supervisor)*

Please Explain or Provide Additional Comments Below:

PS Form **1750**, August 1994 **1 - Forward to Designated Postal Official**

Populated from the Enter Ratings Task

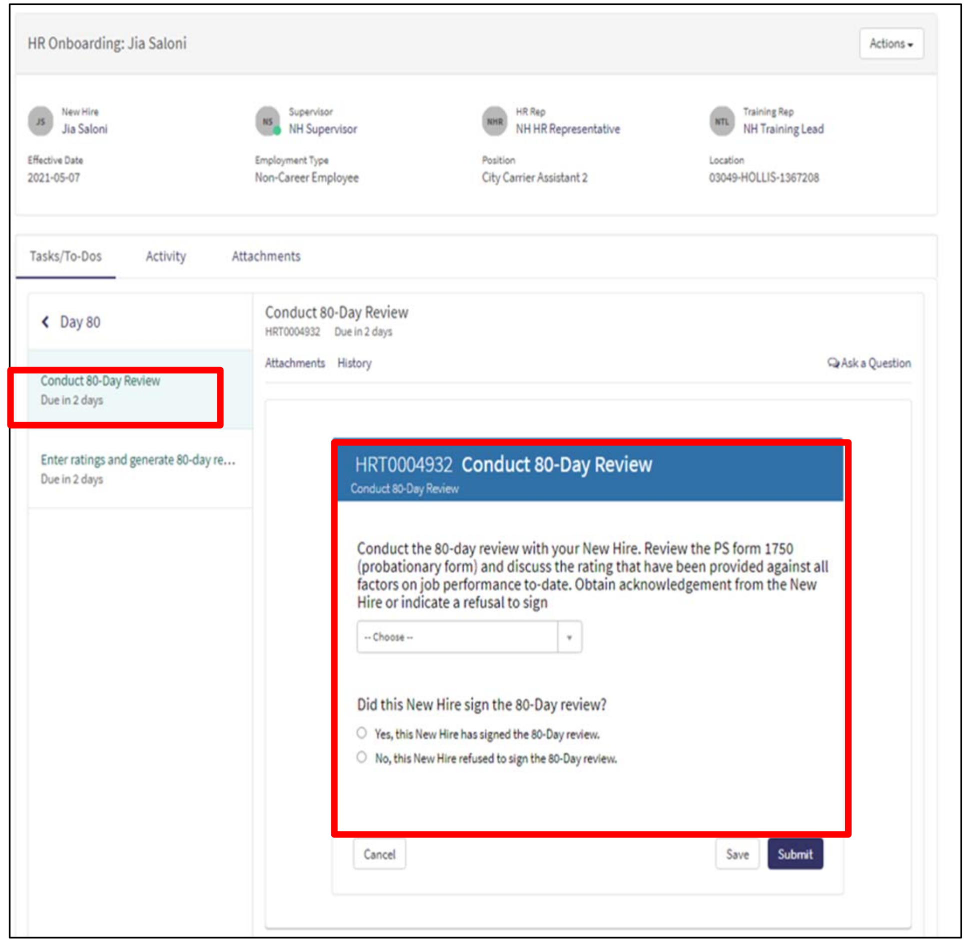
Populated from the New Hire's HR Profile

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.

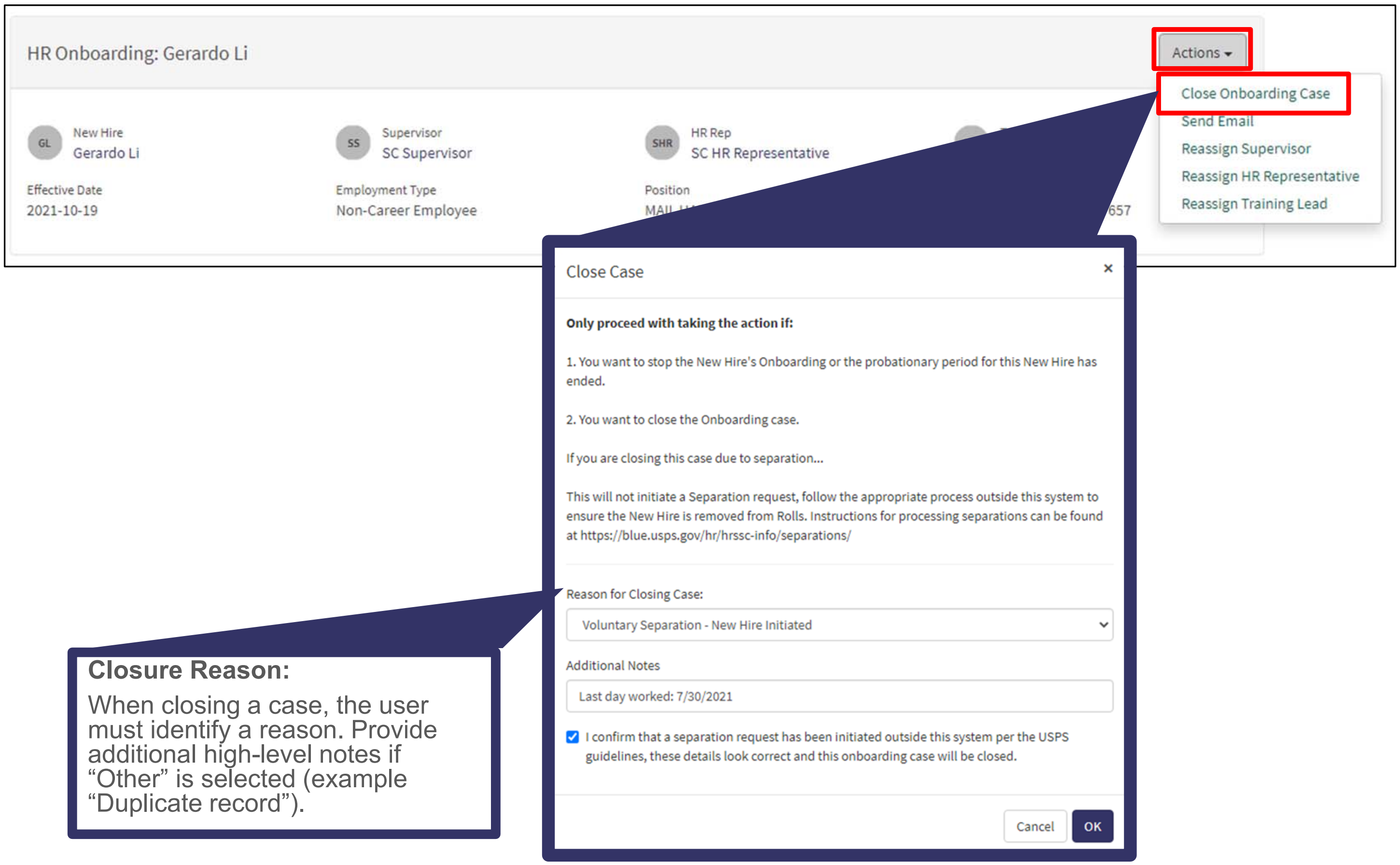


NOTE: *RCAs/ARCs will be excluded from the scheduling and completion of automated PS Form 1750 evaluations at the 30, 60, and 80-Day reviews. They will continue to be evaluated using the same process used today and their reviews will not be captured within the HR Onboarding Pilot tool.*

Module 4

Initiating Separation

Closing a ServiceNow HR Onboarding Case



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/RCAs will close automatically at the end of the New Hire's probationary period.

Manual Closure:

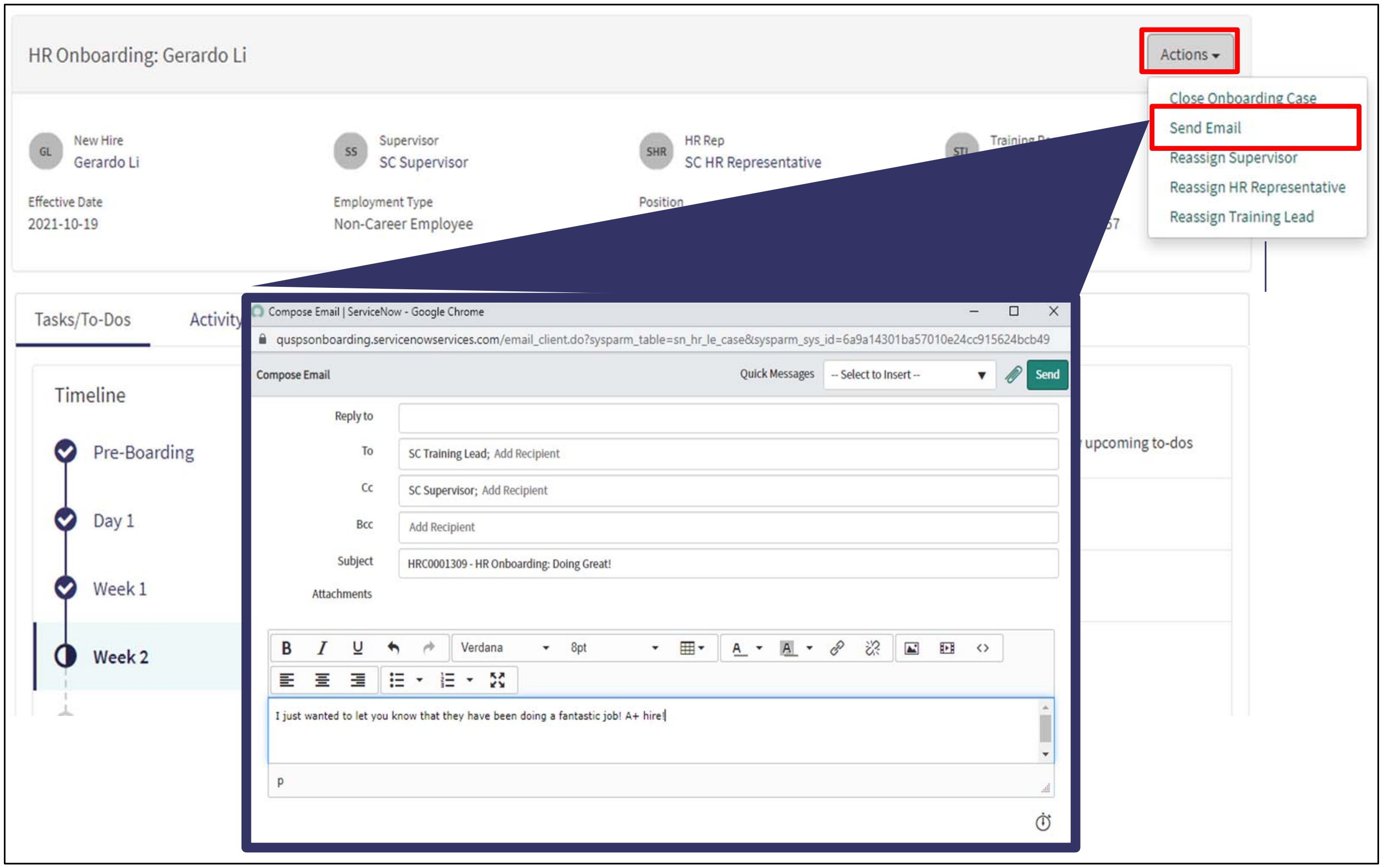
1) ServiceNow HR cases for ARC/RCAs must be closed manually after training is complete.
2) ServiceNow HR cases for <u>any</u> New Hire must be closed manually in the event of a separation from USPS.

Module 5

Communication

Communication – Sending an Email

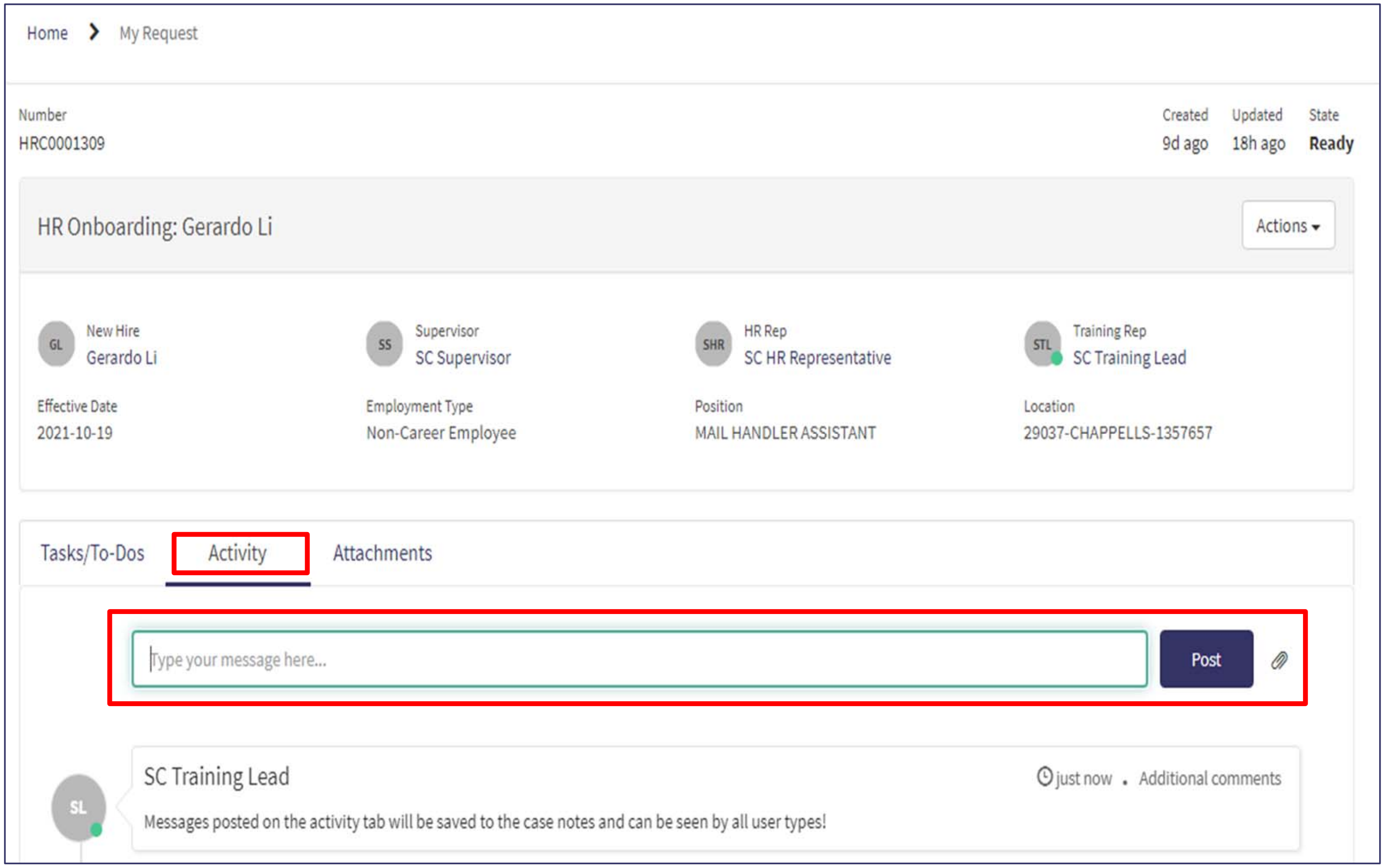
HR Pilot users can send an email to other HR Pilot users, through the case*.The email will be tracked in the case notes.



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.



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 <u>personal</u> email address.
  - **Emails will not be sent to the New Hire <u>on or after</u> their effective date.**
- Users can validate that these emails have been sent out via the Activity tab of the case.
- System generated emails will <u>not</u> 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

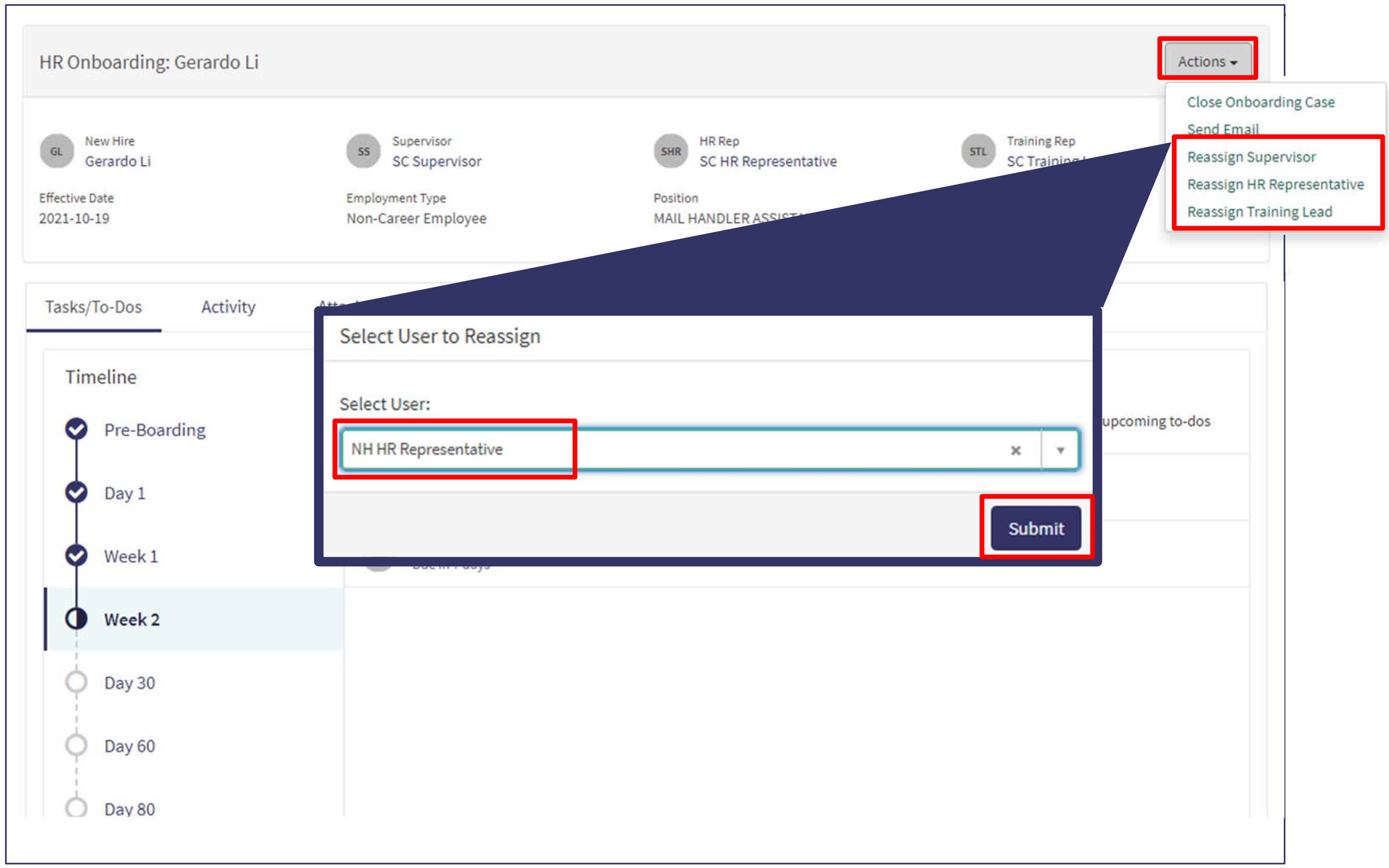
***NOTE:** *If the task is completed prior to the New Hire's effective date, a system generated email containing the relevant information will be sent. However, if the task is completed past the New Hire's effective date, no system generated email will be sent to the New Hire and it will be the responsibility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

Module 7

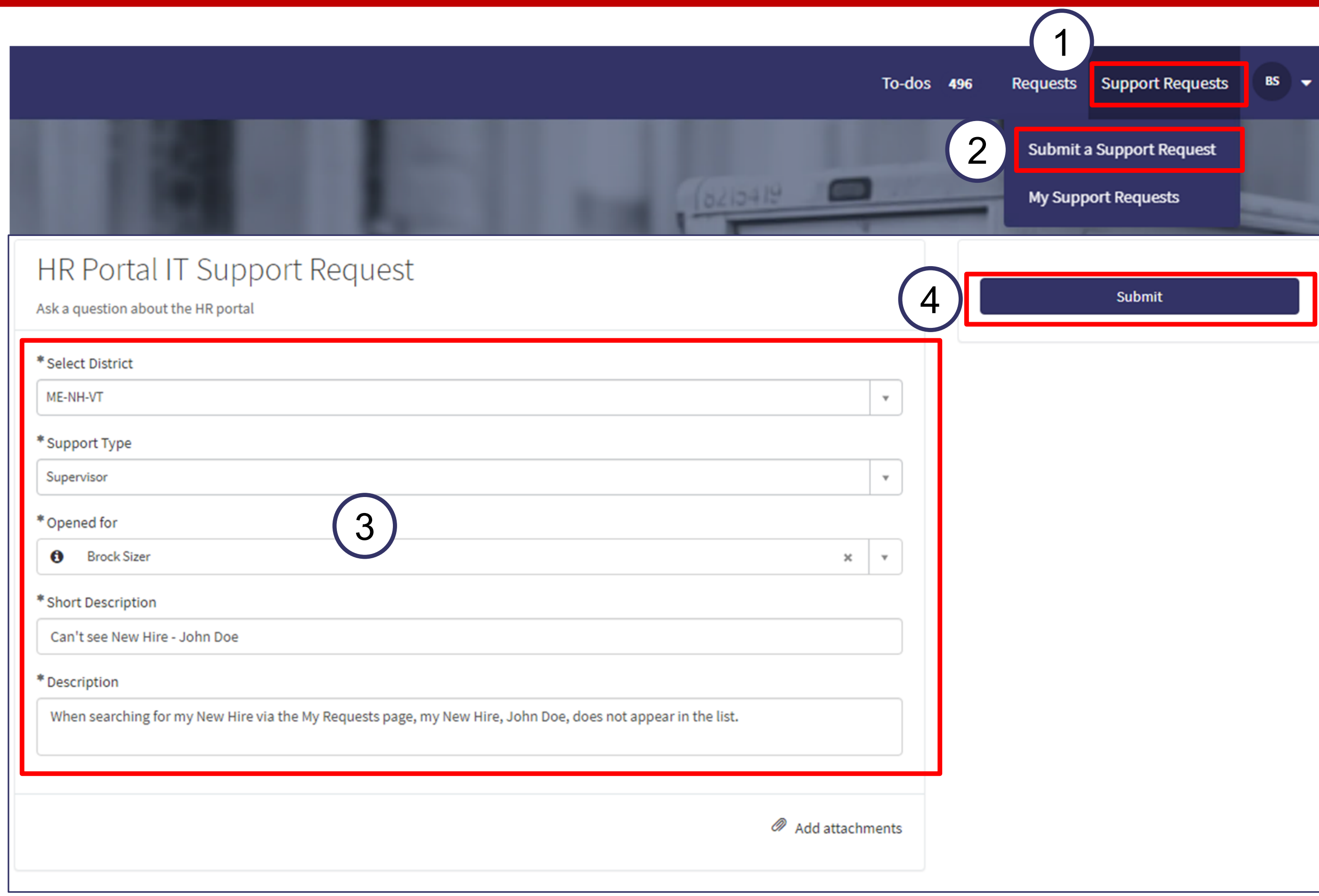
Submitting a Support Request

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



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://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 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

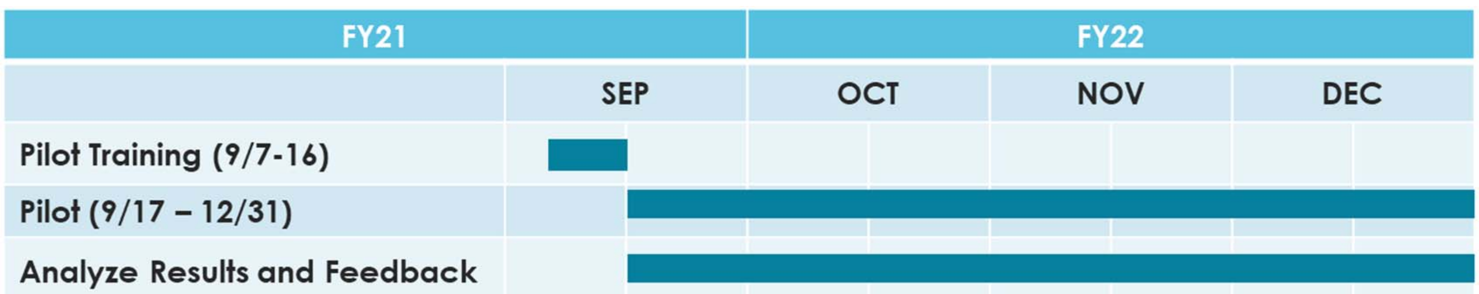
Module	Topic Covered	Est. Time (min)
1.	Portal (Homepage widgets, My Requests Page, My To-Dos Page, My Team Page, Helpful Links, Training Widget)	10
2.	Dashboard & Reporting (Navigating to Dashboard, Dashboard tabs, Dashboard filters)	5
3.	Workflow 3.1 Pre-Boarding 3.2 Week 1 Tasks 3.3 Week 2 Tasks	15
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



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.

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.

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: 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

7

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://qusponboarding.servicenowservices.com/training
    - PROD URL: https://uspsonboarding.servicenowservices.com/training

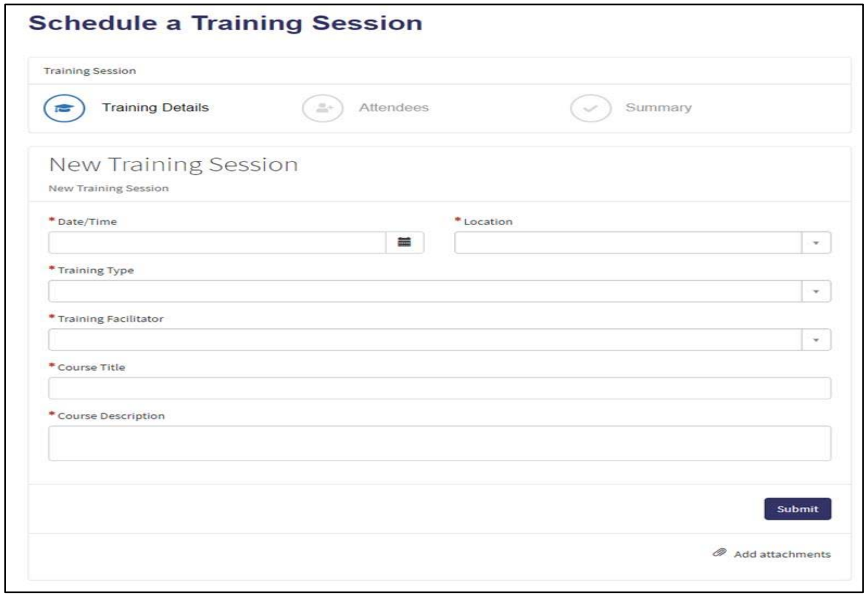
  - All HR Pilot users will have access prior to go-live. However, if users need access to the system after go-live, they can request access following these steps:
    - To request access, email the HR coordinators. HR Coordinators will submit a Support Request in the HR Onboarding Pilot system. The HR 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 <u>in bulk</u>

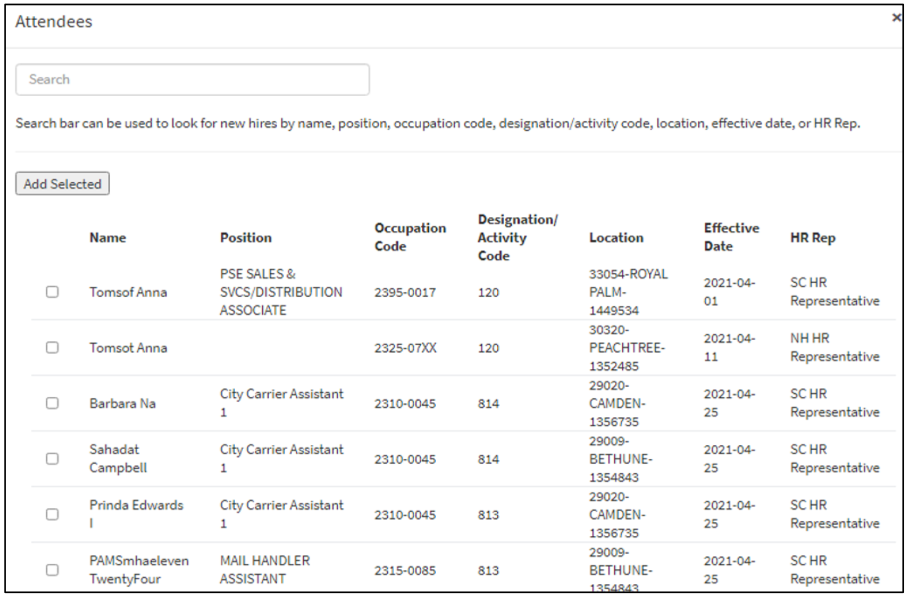
Schedule a Training Session:

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



Add Attendees:

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



Training Widget – Managing Sessions & Attendance

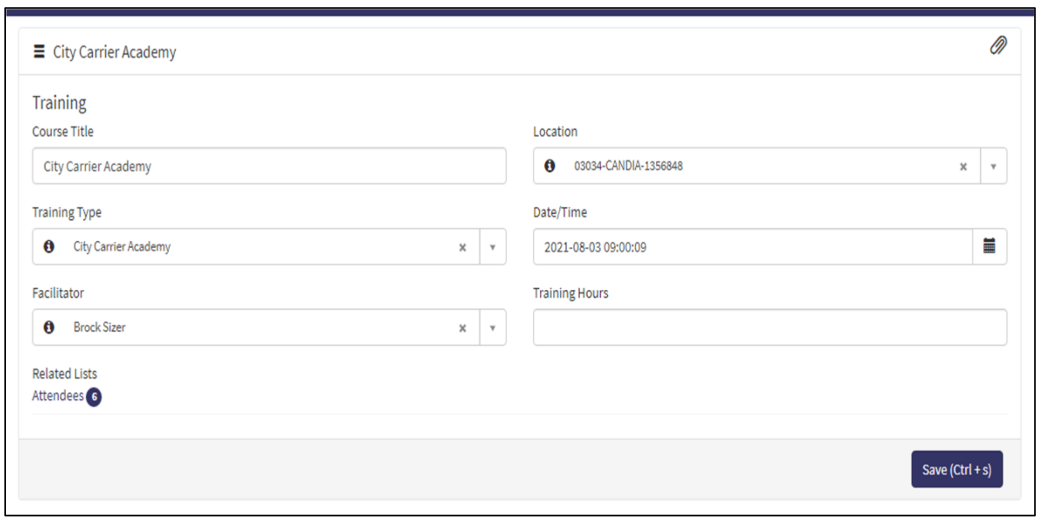
The HR Onboarding "Training Widget" provides a convenient method for Trainers to create, schedule, and mark attendance for orientation and training sessions <u>in bulk</u>

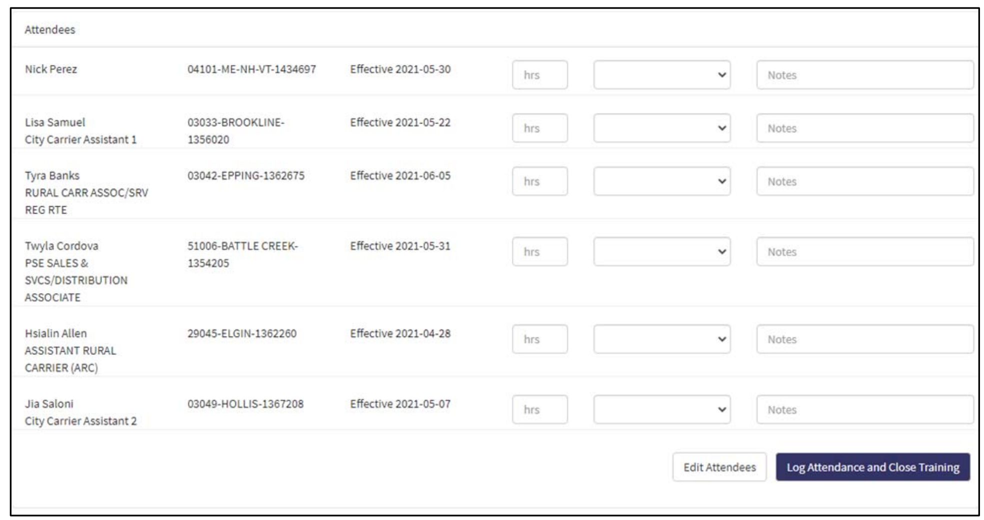
Edit Session Details:

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

Mark Attendance:

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

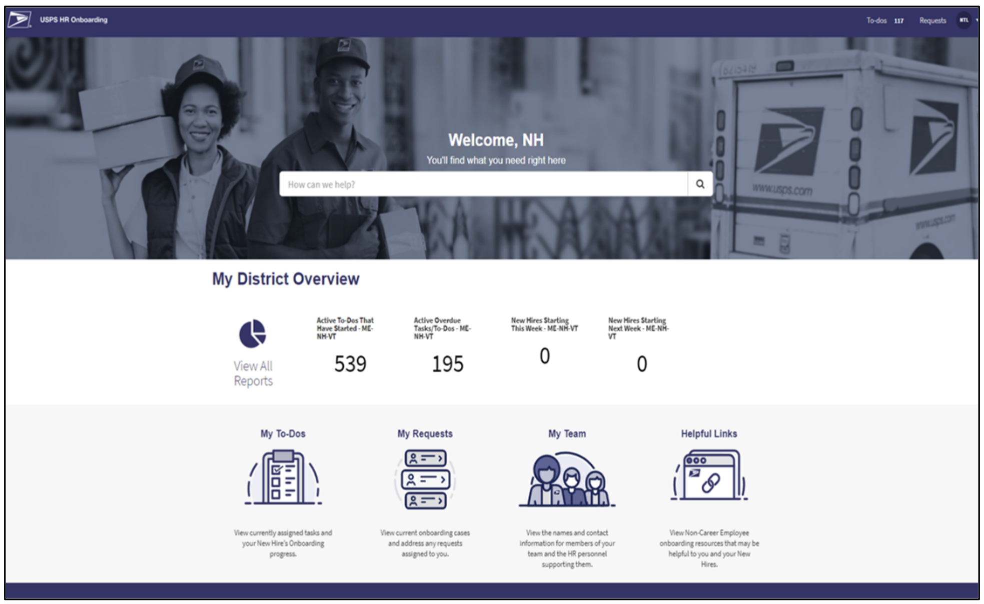




Portal

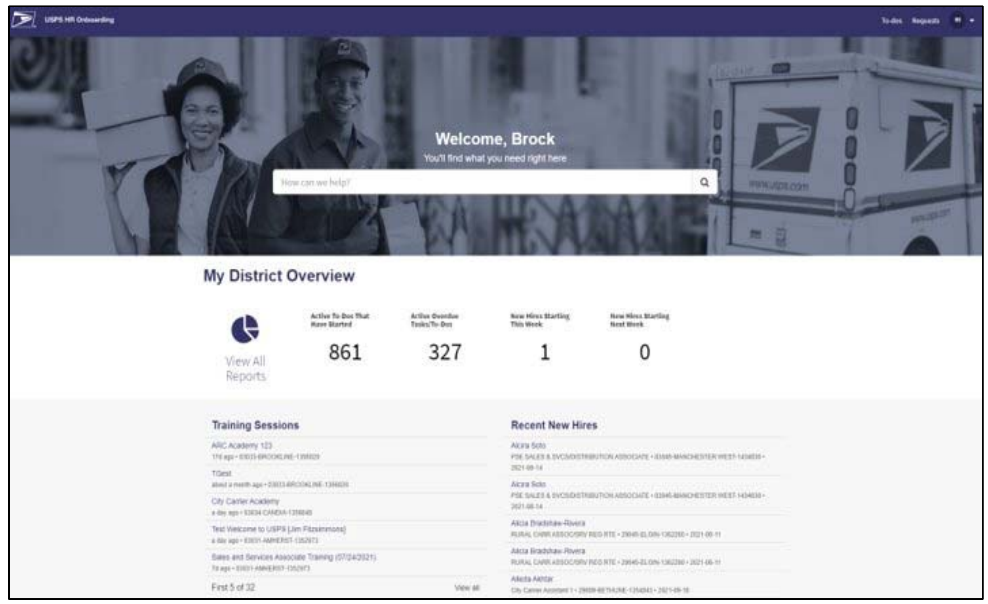
Onboarding Portal

Supervisors will access the Pilot through the Onboarding Portal



Training Portal

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

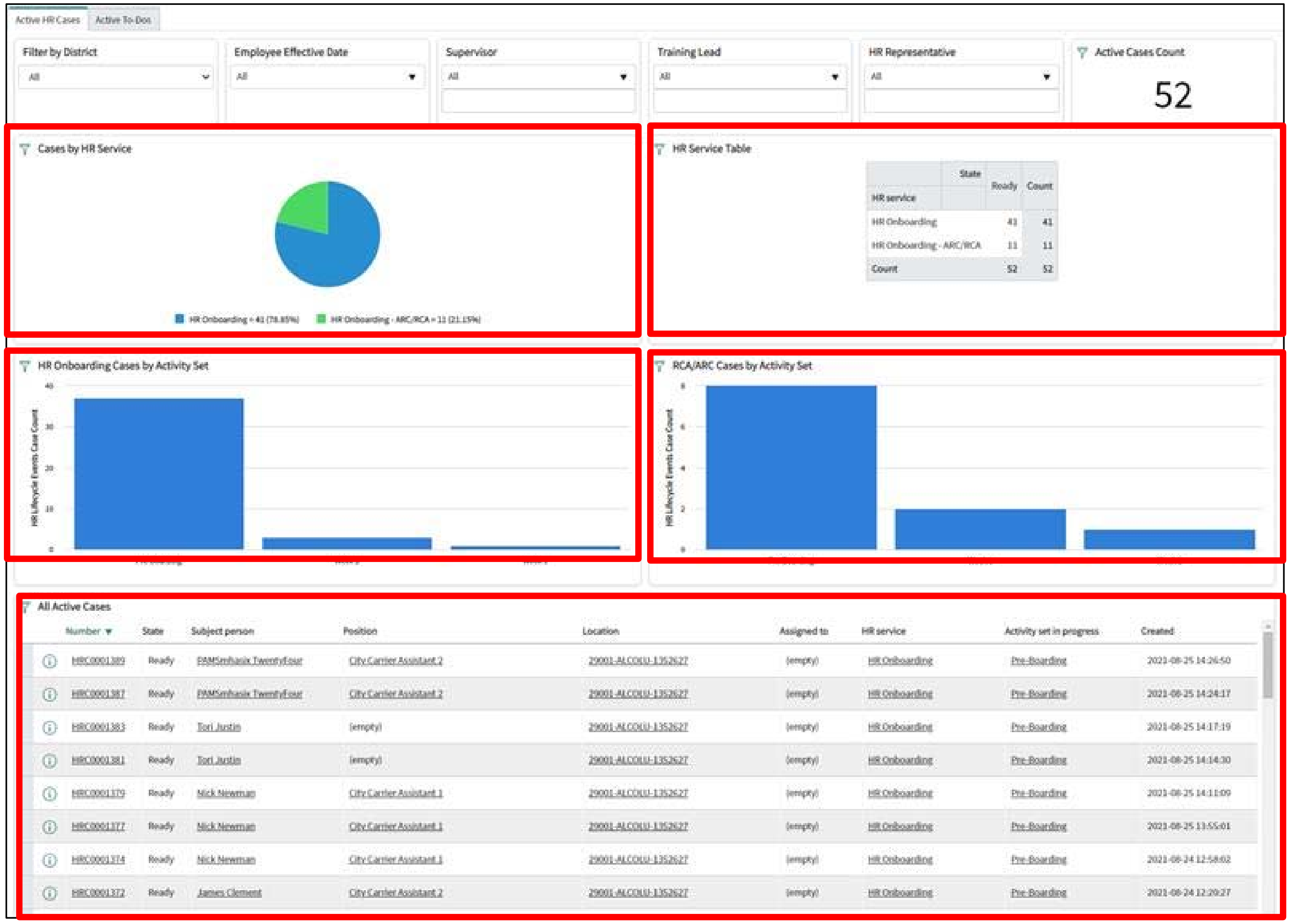


Module 2

Dashboard & Reporting

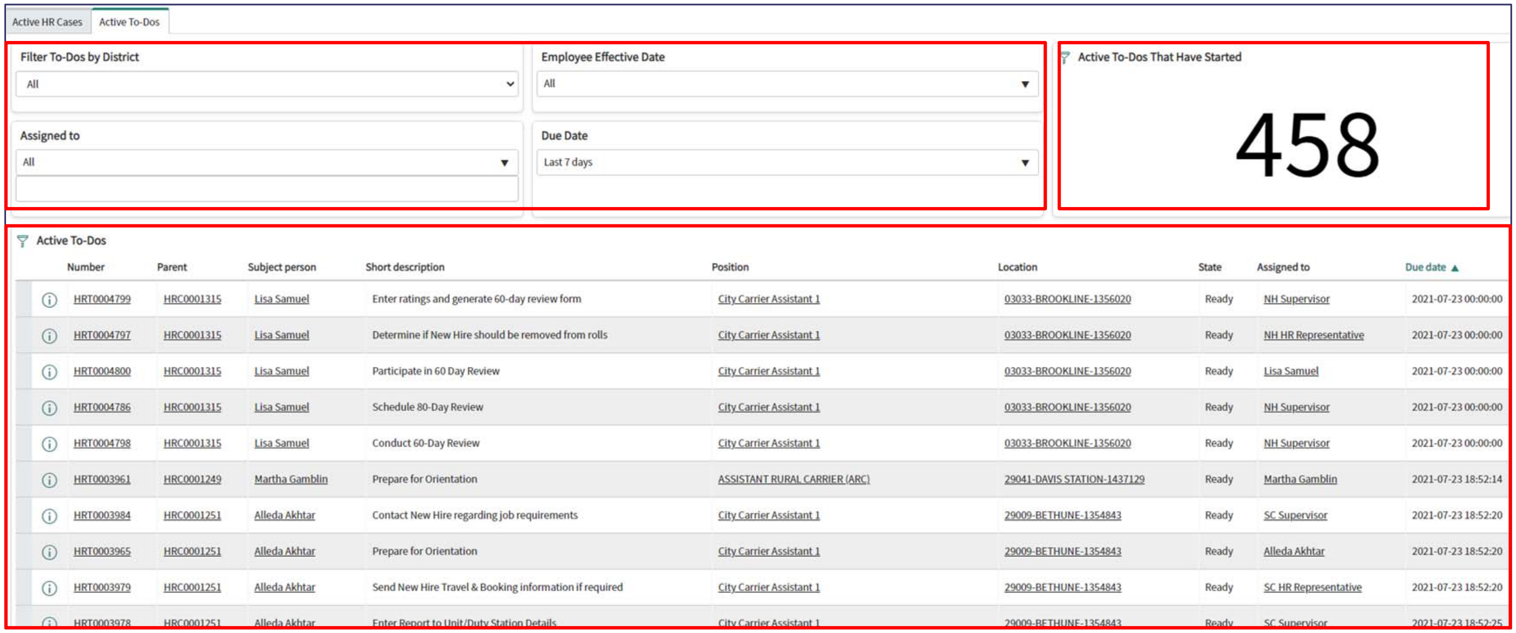
Dashboard & Reporting – Active HR Cases

- **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



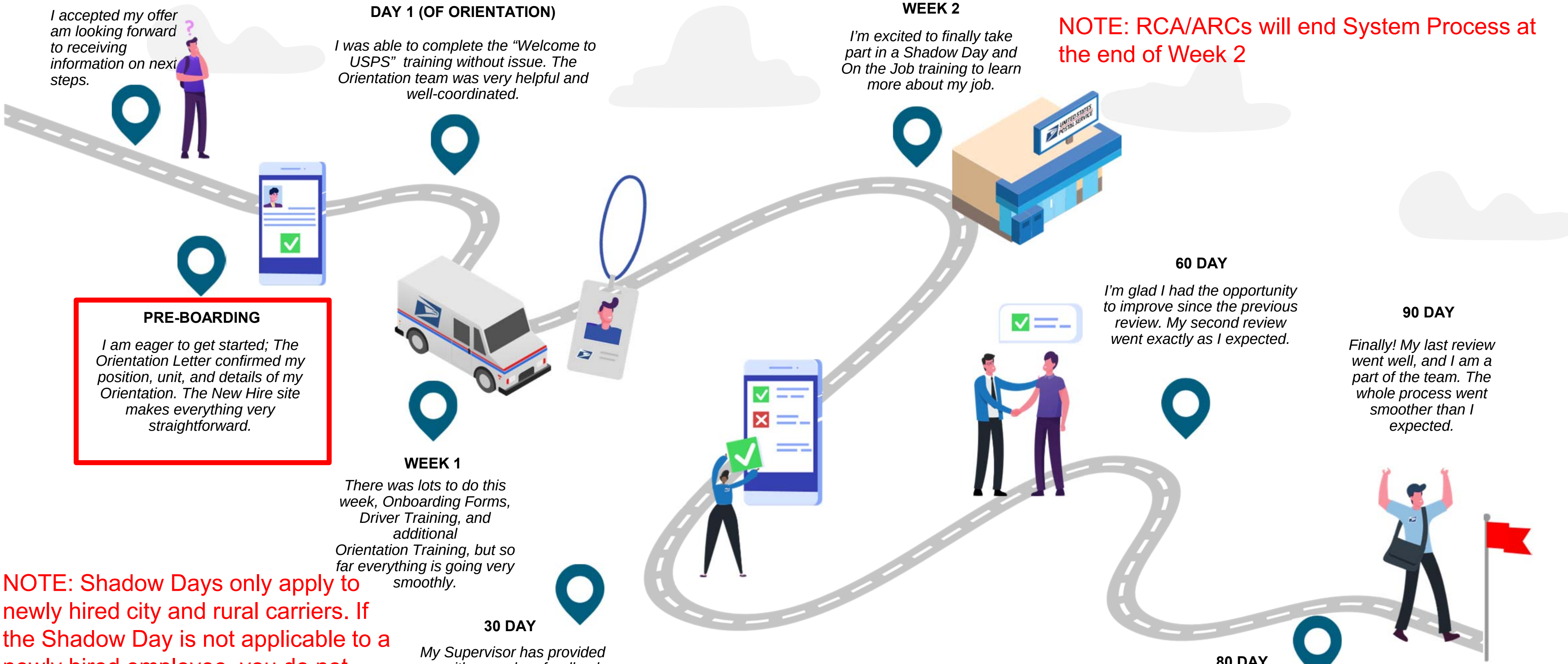
Number	Parent	Subject person	Short description	Position	Location	State	Assigned to	Due date ▲
HRT0004799	HRC0001315	Lisa Samuel	Enter ratings and generate 60-day review form	City Carrier Assistant 1	03033-BROOKLINE-1356020	Ready	NH Supervisor	2021-07-23 00:00:00
HRT0004797	HRC0001315	Lisa Samuel	Determine 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
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
HRT0004786	HRC0001315	Lisa Samuel	Schedule 80-Day Review	City Carrier Assistant 1	03033-BROOKLINE-1356020	Ready	NH Supervisor	2021-07-23 00:00:00
HRT0004798	HRC0001315	Lisa Samuel	Conduct 60-Day Review	City Carrier Assistant 1	03033-BROOKLINE-1356020	Ready	NH Supervisor	2021-07-23 00:00:00
HRT0003961	HRC0001249	Martha Gamblin	Prepare for Orientation	ASSISTANT RURAL CARRIER (ARC)	29041-DAVIS STATION-1437129	Ready	Martha Gamblin	2021-07-23 18:52:14
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
HRT0003965	HRC0001251	Alleda Akhtar	Prepare for Orientation	City Carrier Assistant 1	29009-BETHUNE-1354843	Ready	Alleda Akhtar	2021-07-23 18:52:20
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
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.

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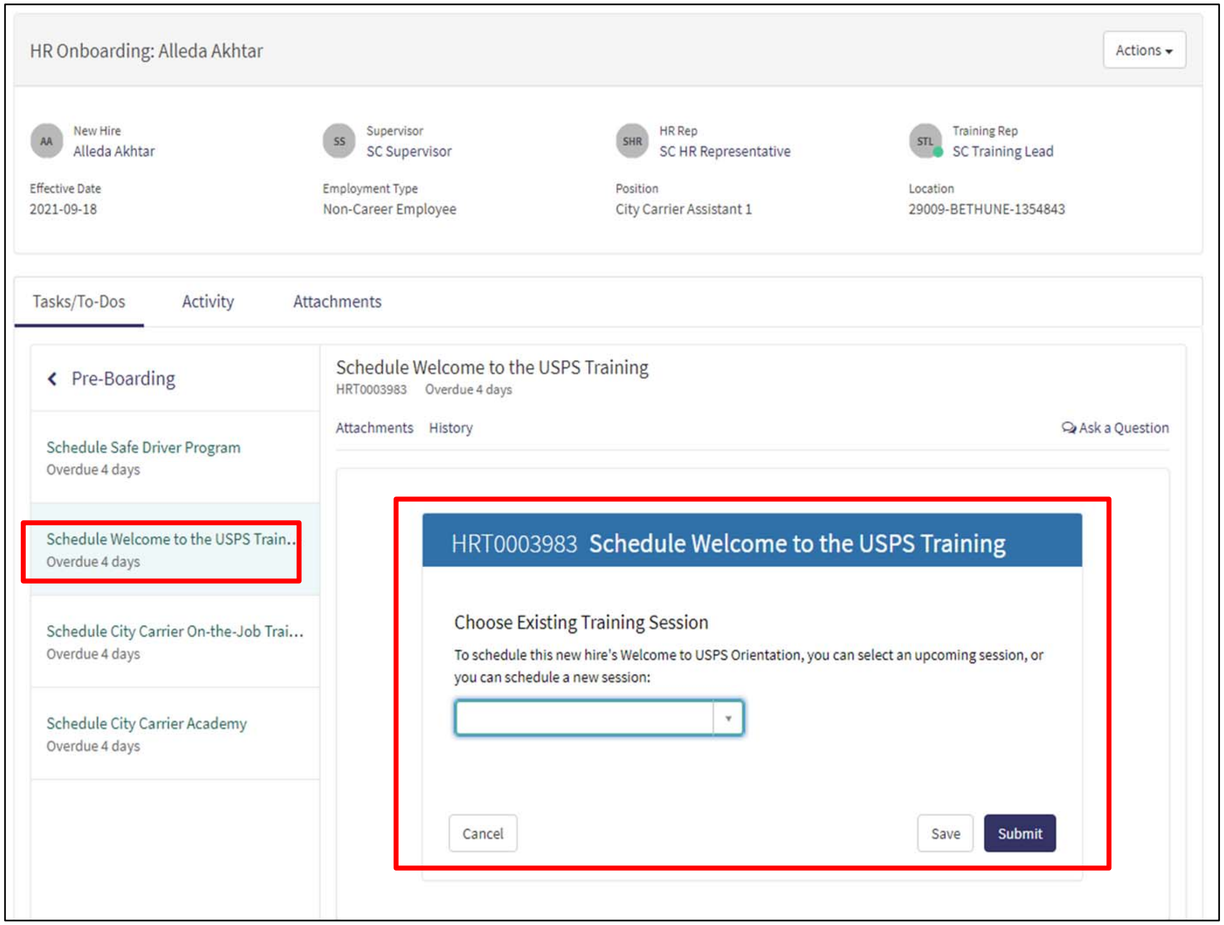
NOTE: Shadow Days only apply to newly hired city and rural carriers. If the Shadow Day is not applicable to a newly hired employee, you do not need to complete the action in the HR Onboarding Pilot System

Workflow – Pre-Boarding Tasks

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

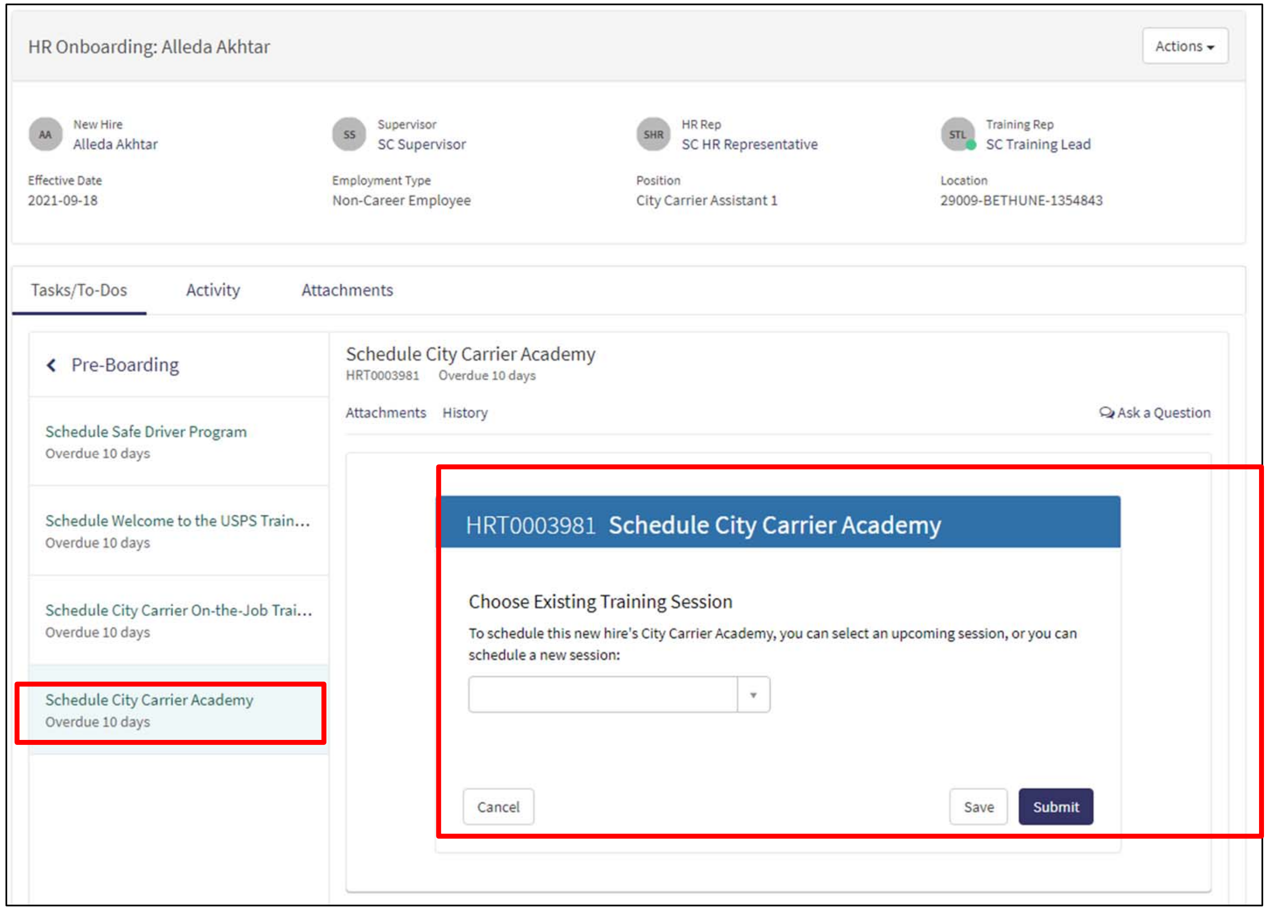
Trainers will use this task to schedule the date a New Hire has their Welcome to USPS Orientation.



Workflow – Pre-Boarding Tasks

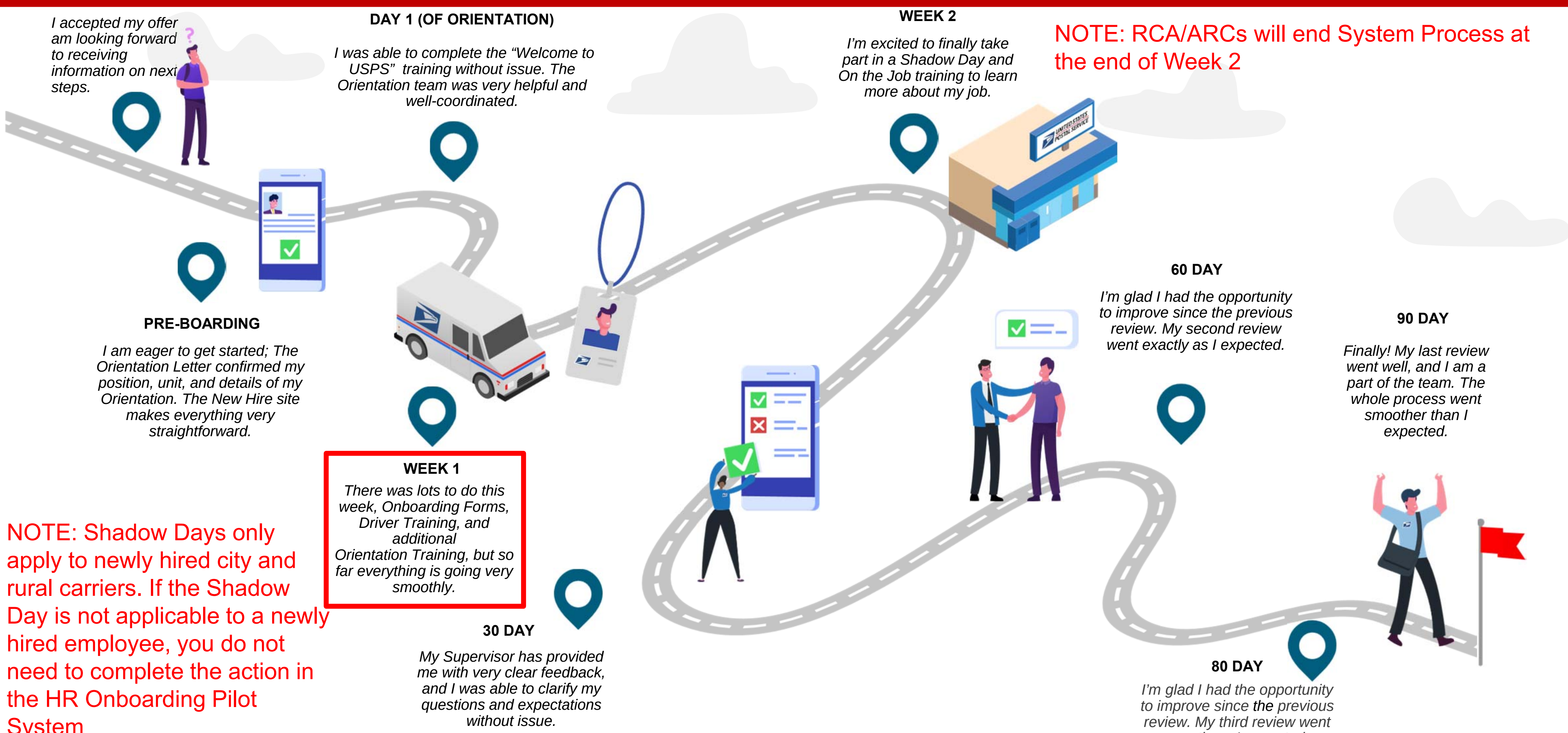
Schedule New Hire ___ Training:

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



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

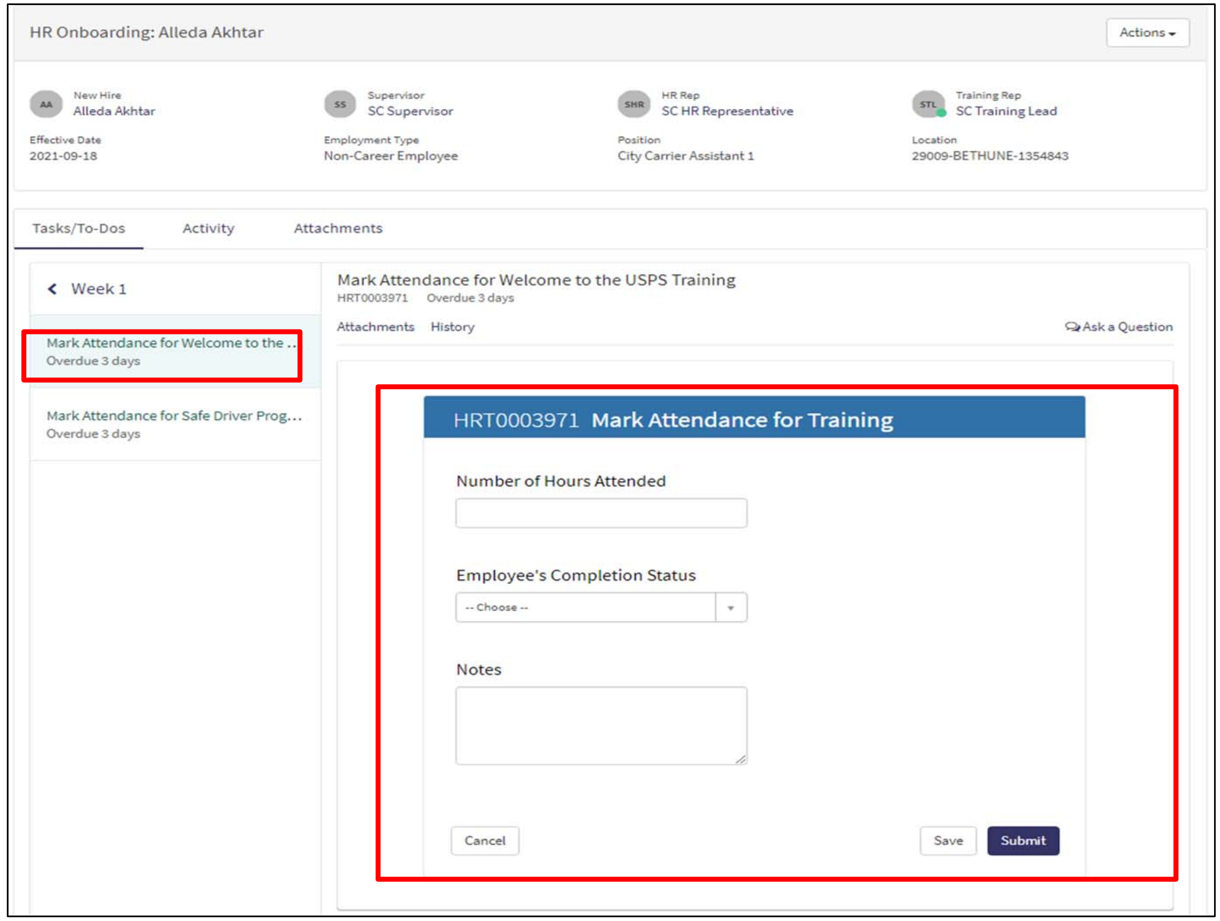
Project Overview - USPS HR Onboarding Pilot Journey Map



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.

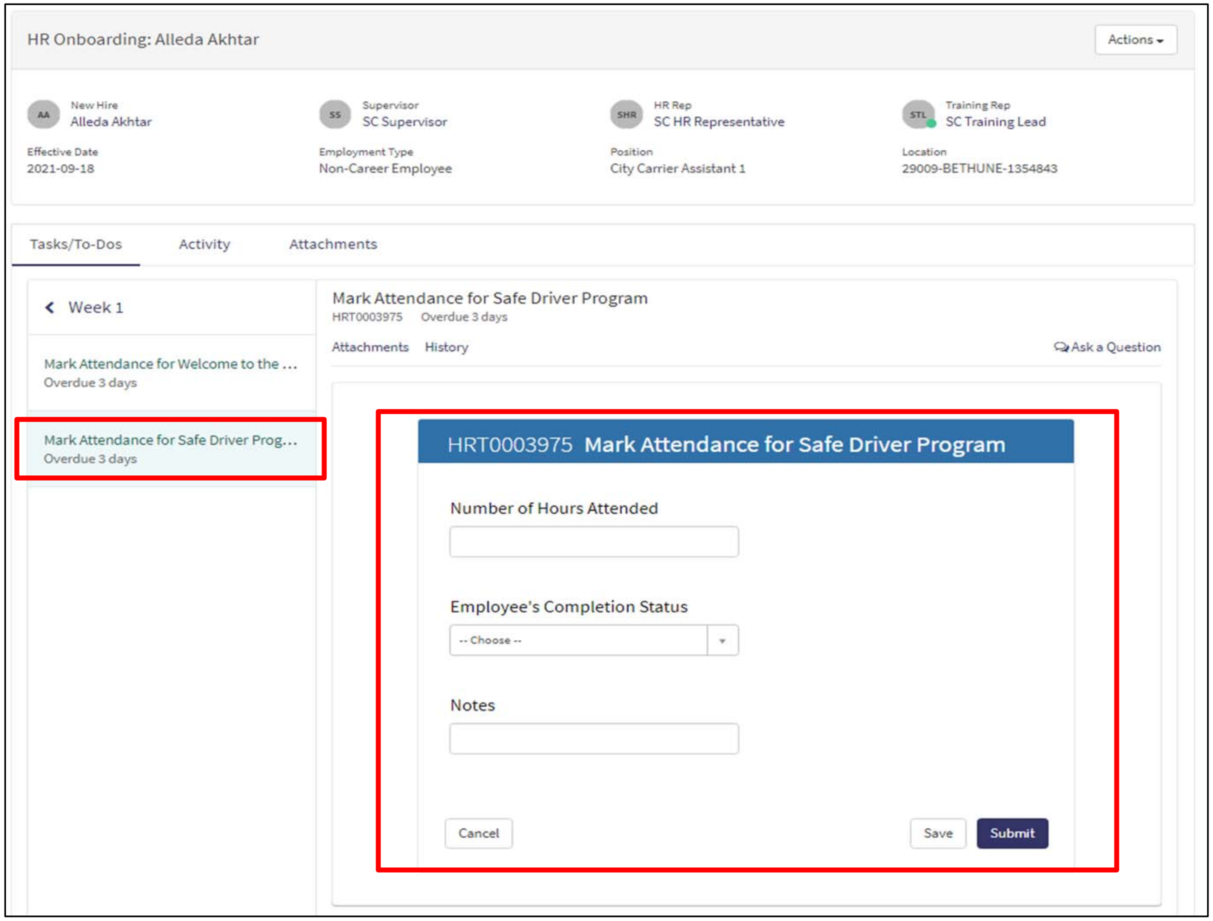


NOTE: Depending on the New Hire's occupation code and training plan, this may include more than one task.

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).



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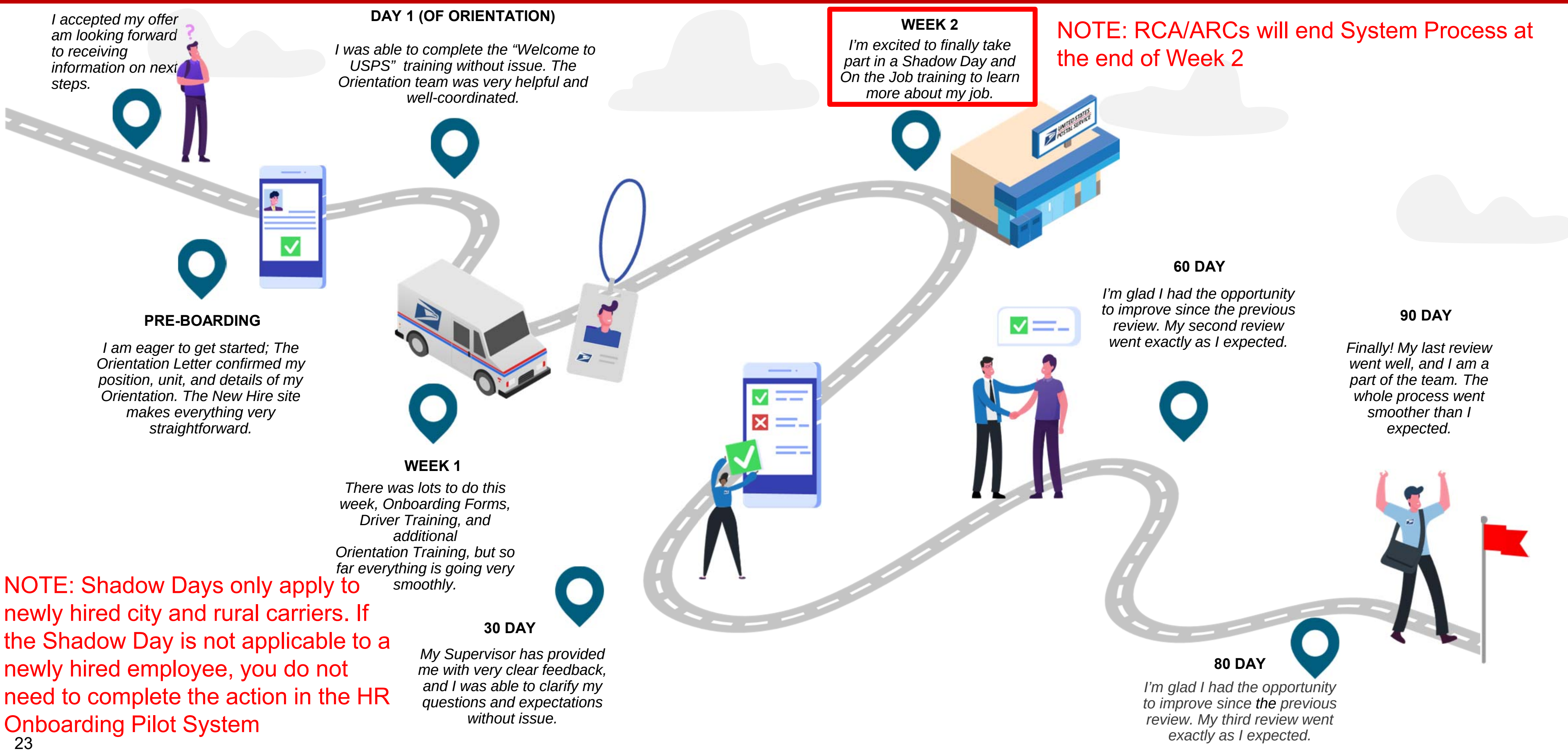
Project Overview - USPS HR Onboarding Pilot Journey Map



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Mark Attendance for ___ Training:

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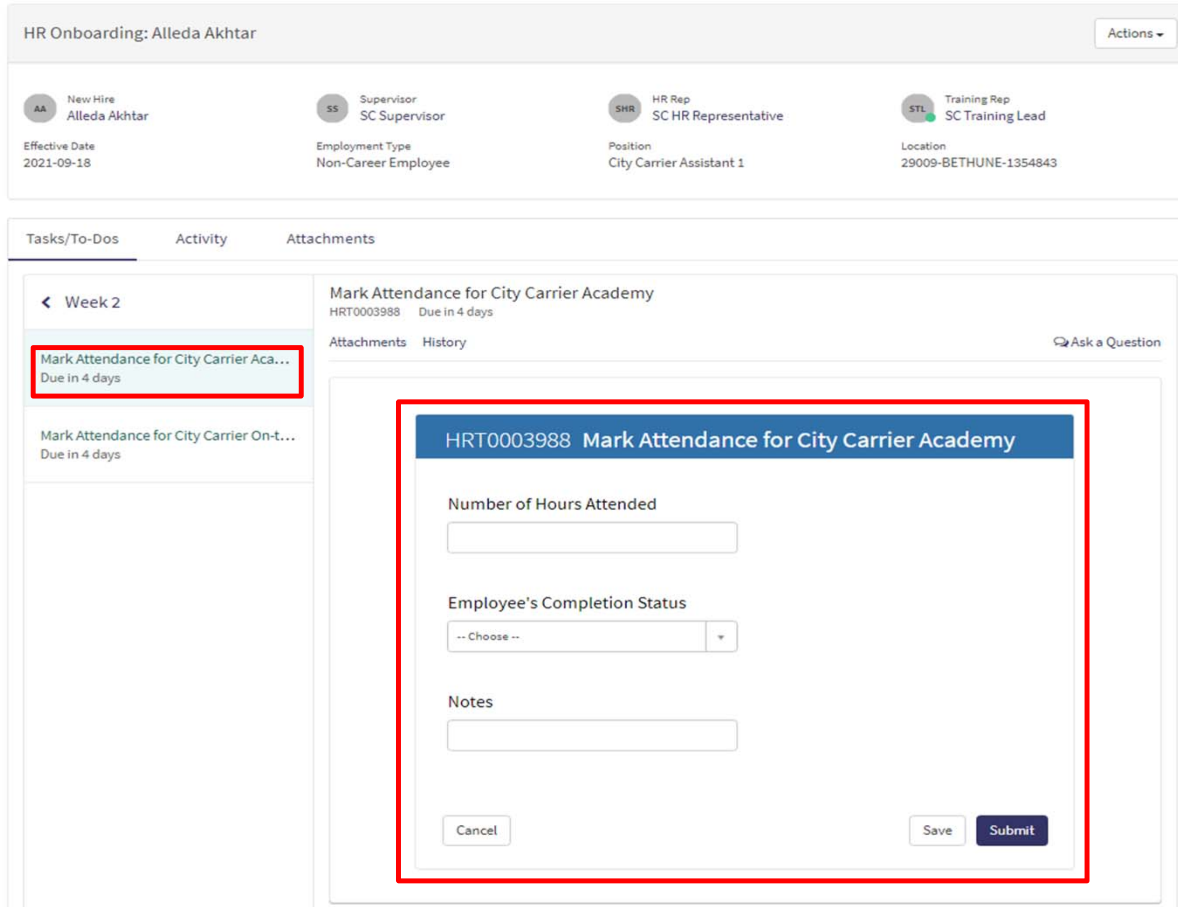
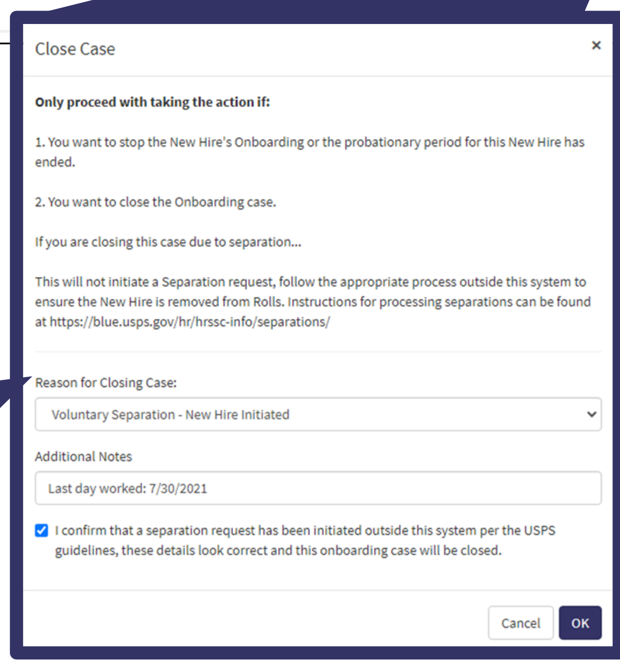


NOTE: Depending on the New Hire's occupation code and training plan, this may include more than one task.

Module 4

Initiating Separation

Closing a ServiceNow HR Onboarding Case



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/RCAs will close automatically at the end of the New Hire’s probationary period.

Manual Closure:

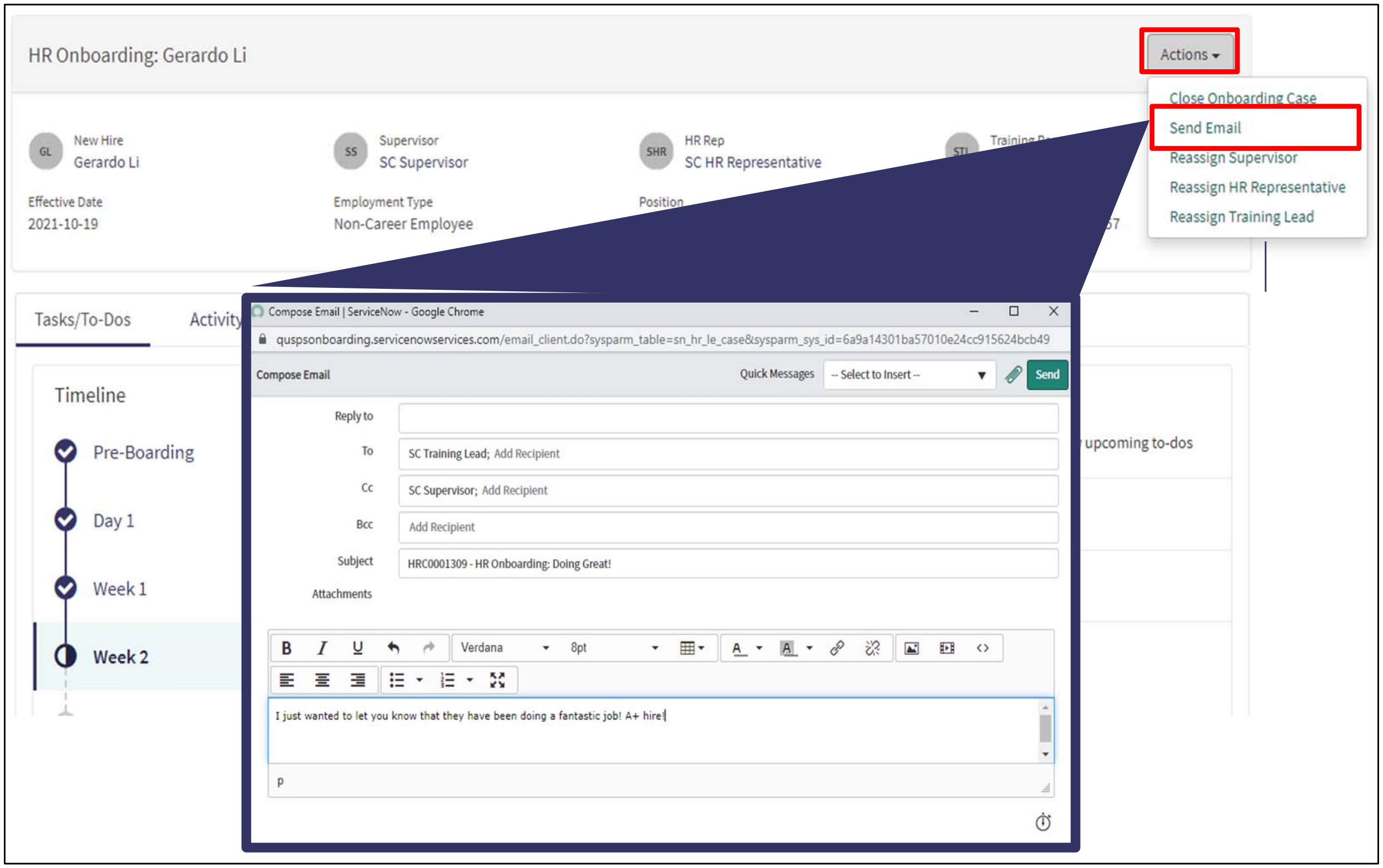
1) ServiceNow HR cases for ARC/RCAs must be closed manually after training is complete.
2) ServiceNow HR cases for <u>any</u> New Hire must be closed manually in the event of a separation from USPS.

Module 5

Communications

Communication – Sending an Email

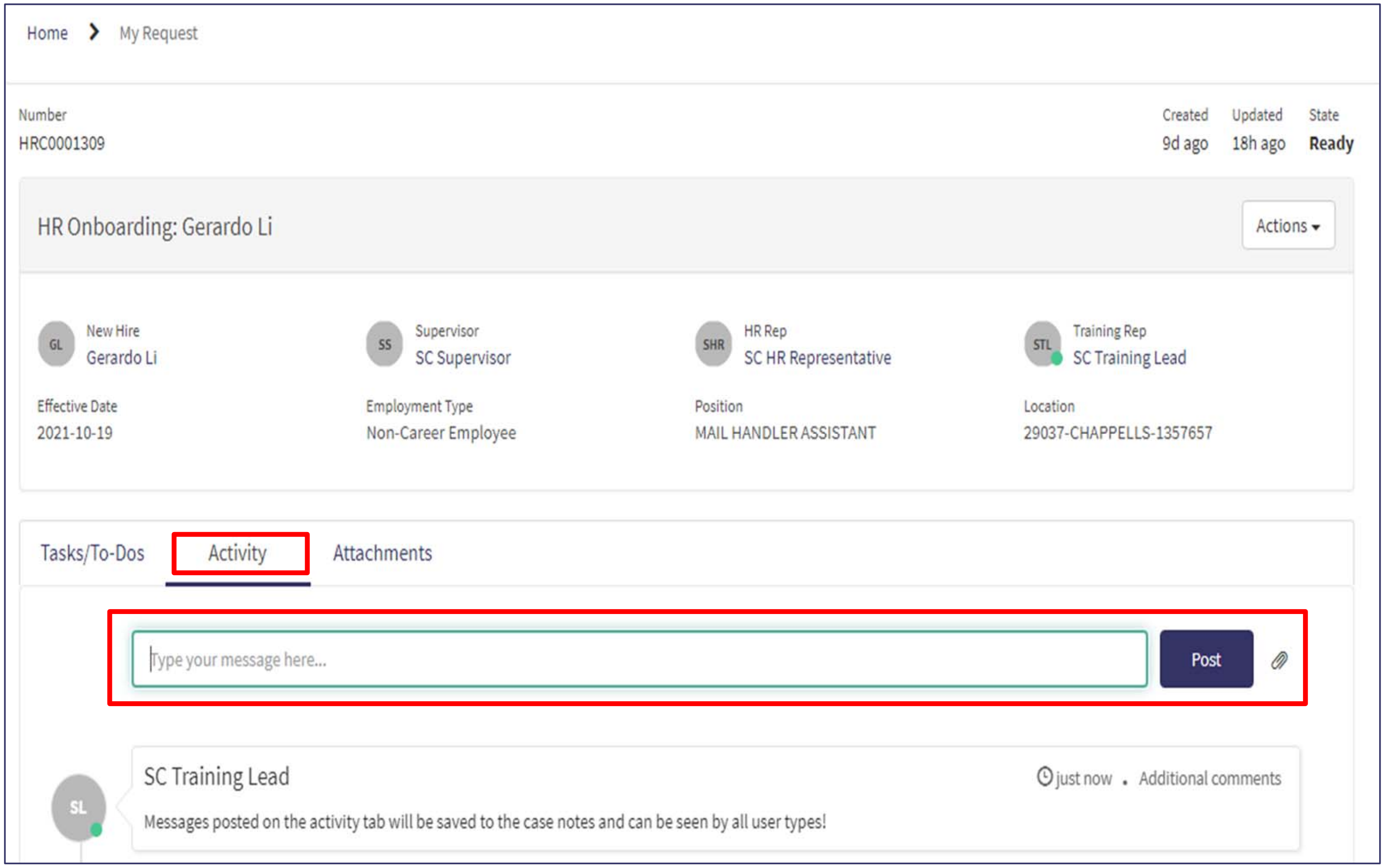
HR Pilot users can send an email to other HR Pilot users, through the case*.The email will be tracked in the case notes.



***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.



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

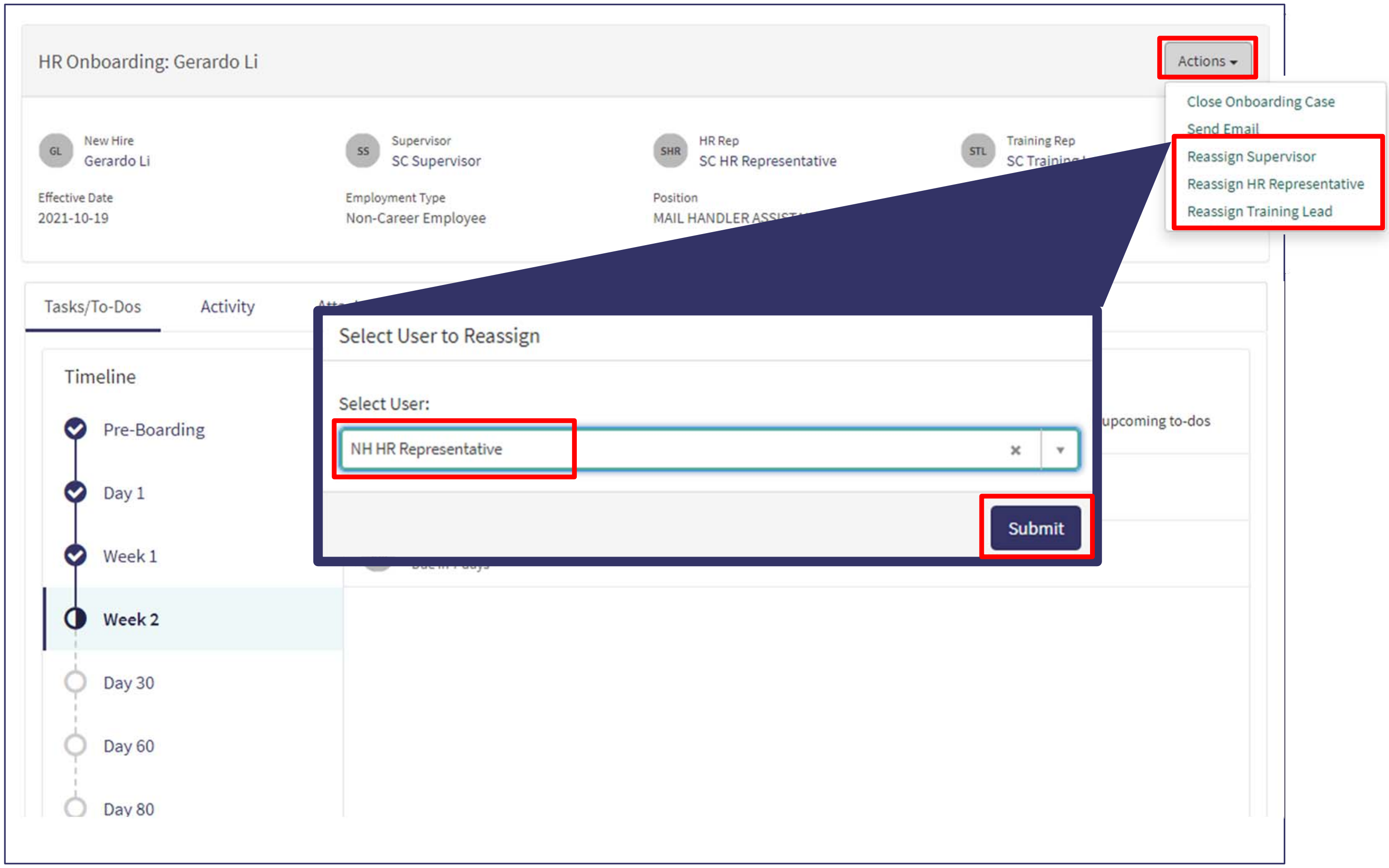
***NOTE:** If the task is completed prior to the New Hire's effective date, a system generated email containing the relevant information will be sent. However, if the task is completed past the New Hire's effective date, no system generated email will be sent to the New Hire and it will be the responsibility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

Module 7

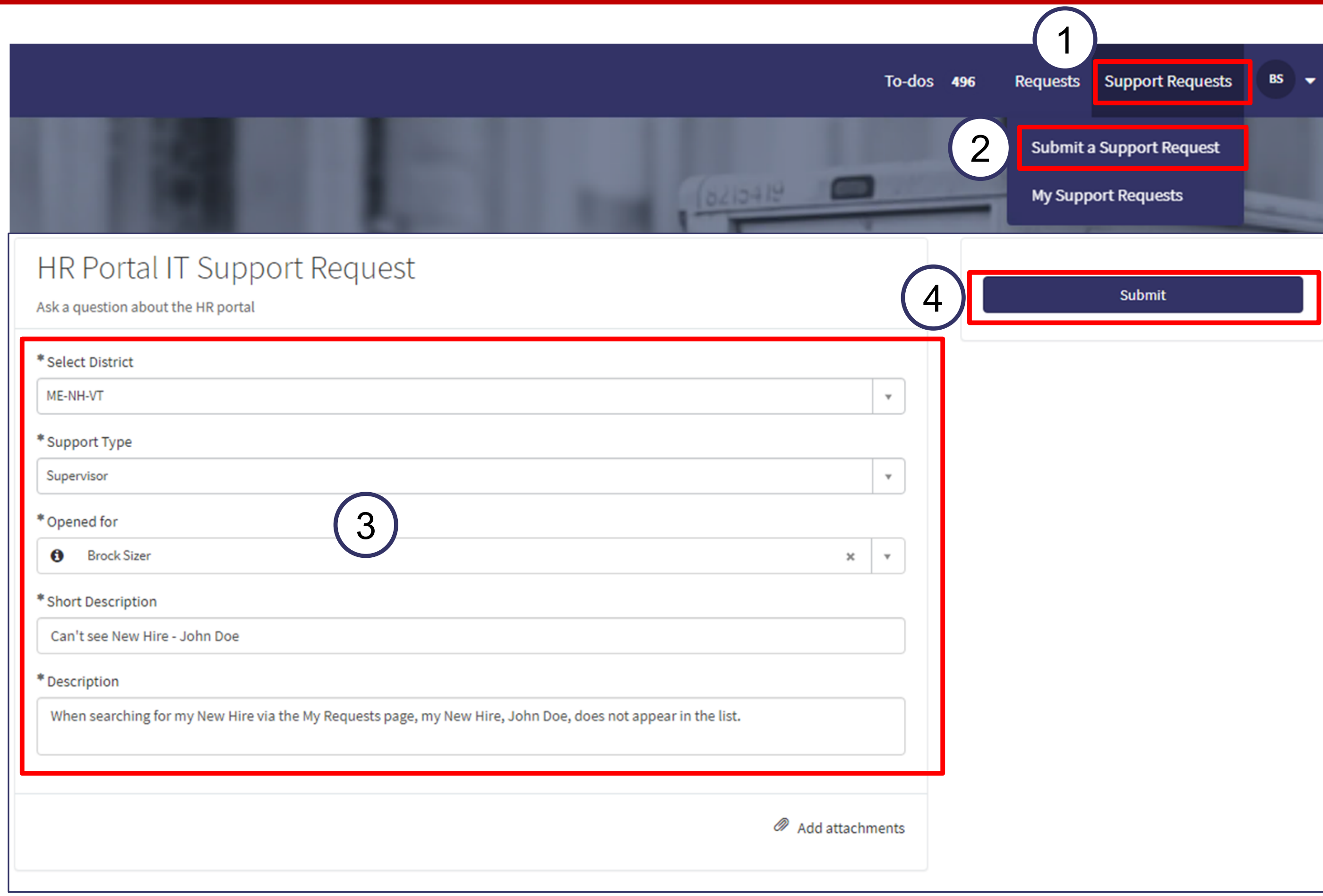
Submitting a Support Request

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



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://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 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://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 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

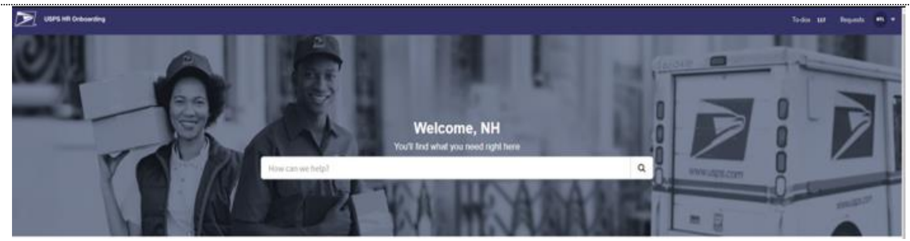
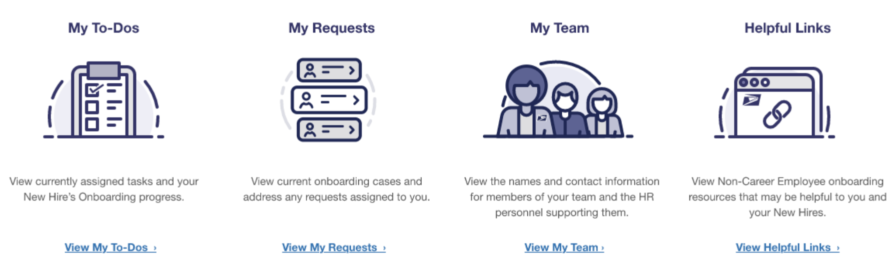
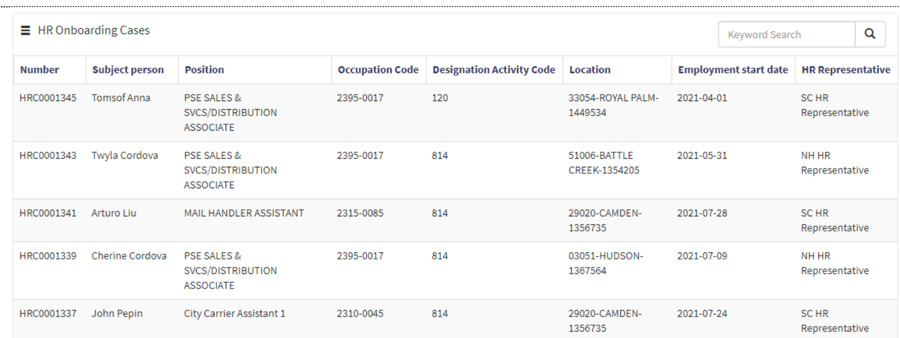
Document purpose and overview:

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 https://uspsonboarding.servicenowservices.com/onboarding to login for Supervisors and HR. https://uspsonboarding.servicenowservices.com/training 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 View *My Requests* located between the *My To-Dos* and *My Team* links. The *My Requests* screen should load.	
4. In the *My Requests* screen, click on the name of the New Hire Case you want to view. The new hire's record should load.	

HR Onboarding Cases

Keyword Search

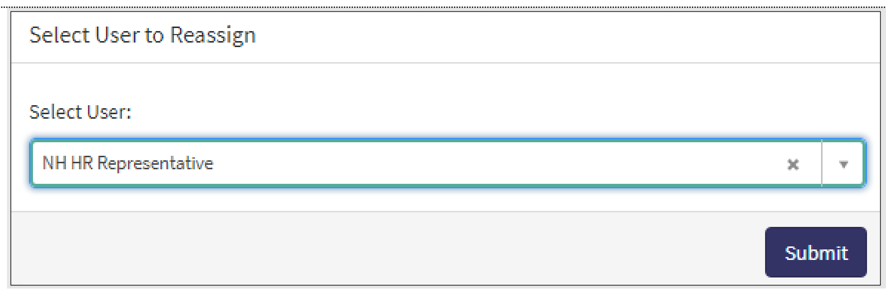
Number	Subject person	Position	Occupation Code	Designation Activity Code	Location	Employment start date	HR Representative
HRC0001345	Tomsof Anna	PSE SALES & SVCS/DISTRIBUTION ASSOCIATE	2395-0017	120	33054-ROYAL PALM-1449534	2021-04-01	SC HR Representative
HRC0001343	Twyla Cordova	PSE SALES & SVCS/DISTRIBUTION 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

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 *Actions* 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.	

Other notes on reassignment:

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).

- A user who is assigned to the case can transfer it to someone else.
- A user who is not assigned to the case can transfer it to themselves ("claim" it), OR
- A user who is not assigned to the case can transfer it from person A to person B ("manage" or "administer" it).

View and Complete a To-Do

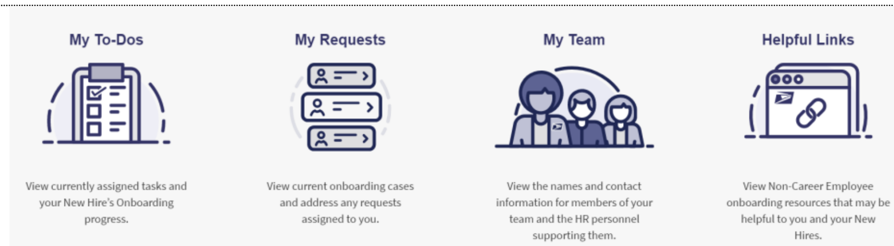
Navigation: **Home > My To-Dos**

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.

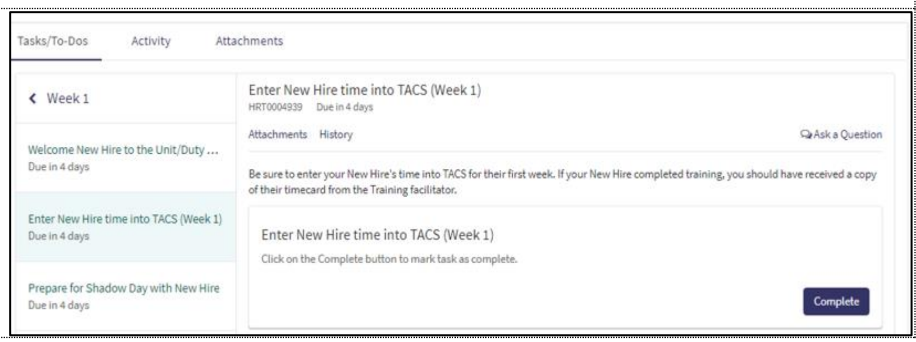
<table>
<tr><th>Important Step</th><th>Visual Aid</th></tr>
<tr><td>1. Go to https://uspsonboarding.servicenowservices.com/onboarding to login.</td><td></td></tr>
<tr><td>2. Login to the HR Onboarding Pilot with your ACE ID. The home screen should load.</td><td></td></tr>
<tr><td>3. On the home screen, 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.</td><td>



</td></tr>
<tr><td>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.</td><td>



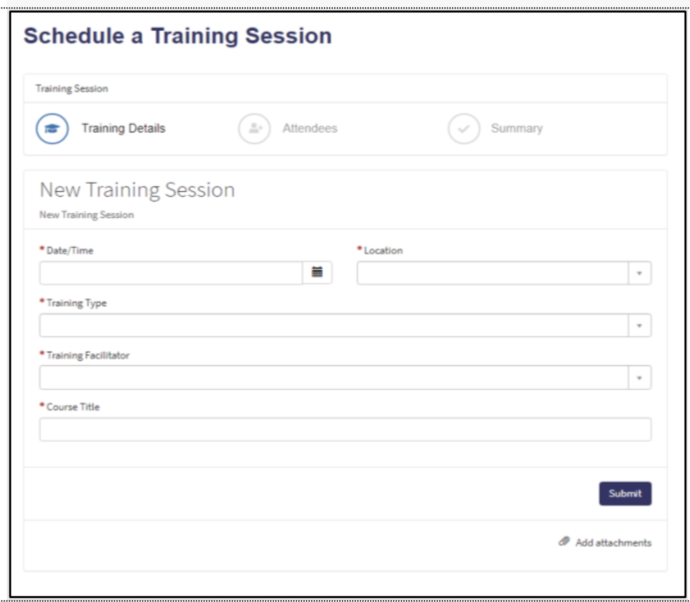
</td></tr>
</table>

Schedule a Training Session in Bulk

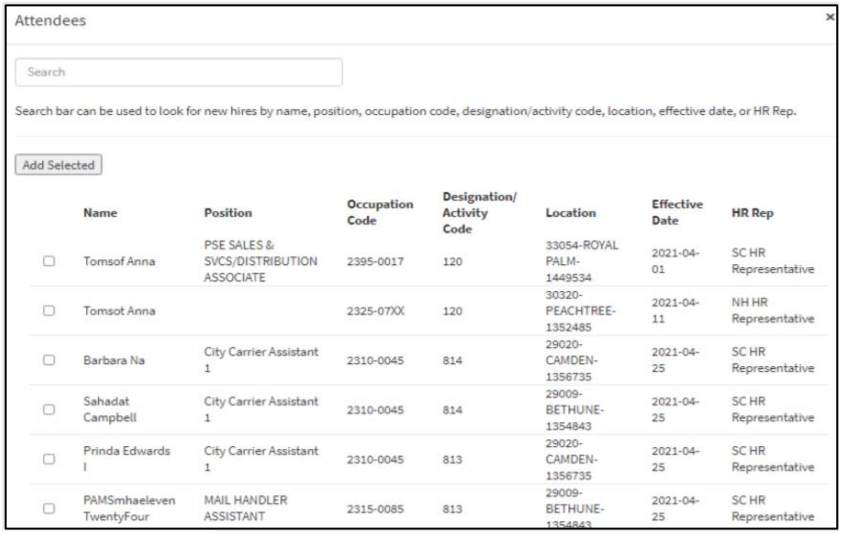
Navigation: **Home > Training Sessions > Schedule a Training Session**

How to schedule a training session for multiple new hires.

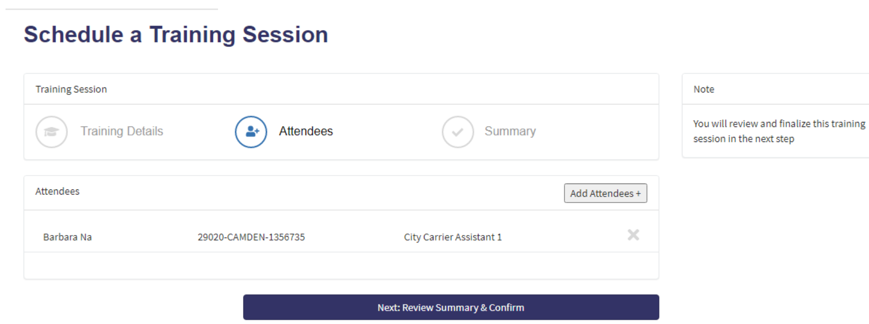
Trainers can create and schedule new hires to training sessions through the HR Onboarding Pilot. Limited to notifying the new hire via email with the training session details.

Important Step	Visual Aid
1. (When logged in) From the Home screen click on “Schedule a New Training” button under *Training Sessions*. The *Schedule a Training* screen loads on the *Training Details* step.	
2. Enter the Training Details and click “Submit”. The *Attendees* step loads next.	

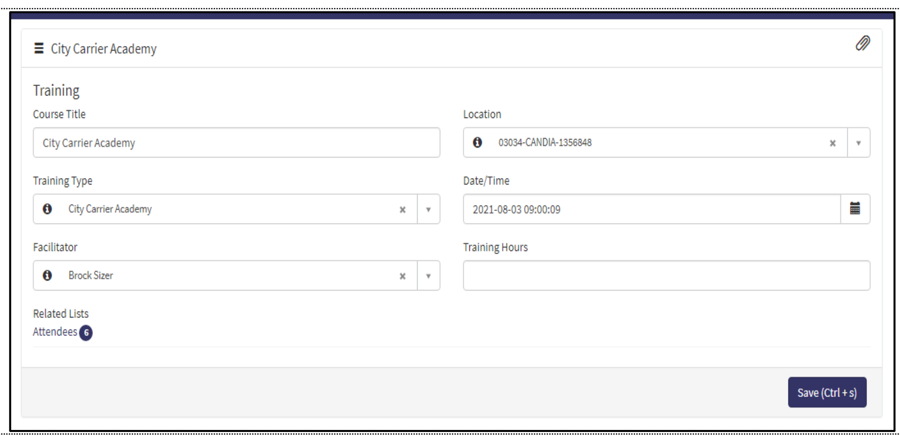
3. Click the *Add Attendees* button. A list of pre-filtered attendees will load.



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.



5. Review the summary details and click "Save" when done.



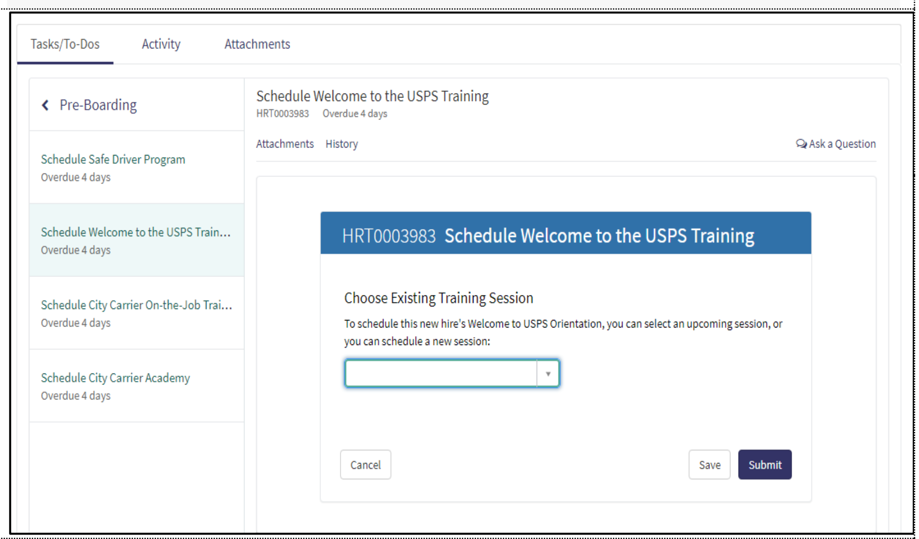
Schedule a Training Session Individually

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.

<table>
<tr><th>Important Step</th><th>Visual Aid</th></tr>
<tr><td>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.

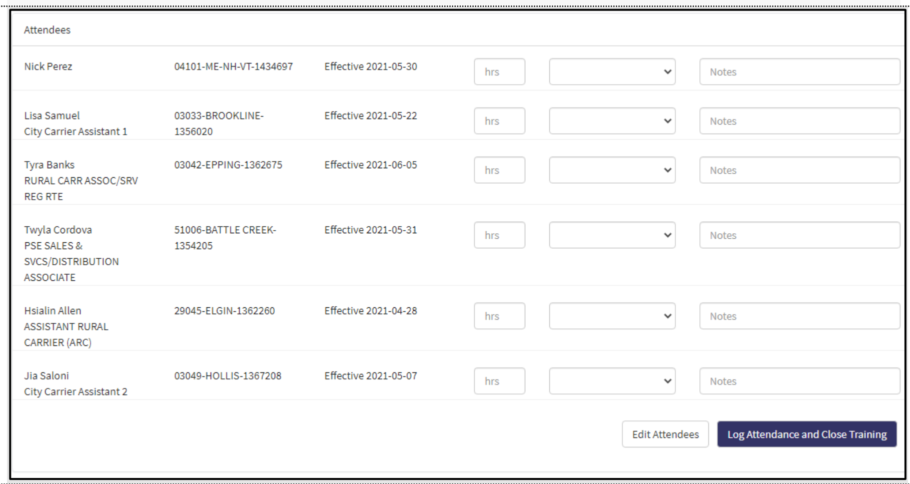
Note: You will first need to click on the activity set that the training session belongs to. The “Welcome to USPS Training” training session belongs to the Pre-Boarding activity set.</td><td>
</td></tr>
<tr><td>2. Click on the dropdown to “Choose Existing [training title] Session” Where [training title] is the name of the training session.</td><td rowspan="2">
</td></tr>
<tr><td>3. Click the Submit button. The new hire should be assigned to the training session.</td></tr>
</table>

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.

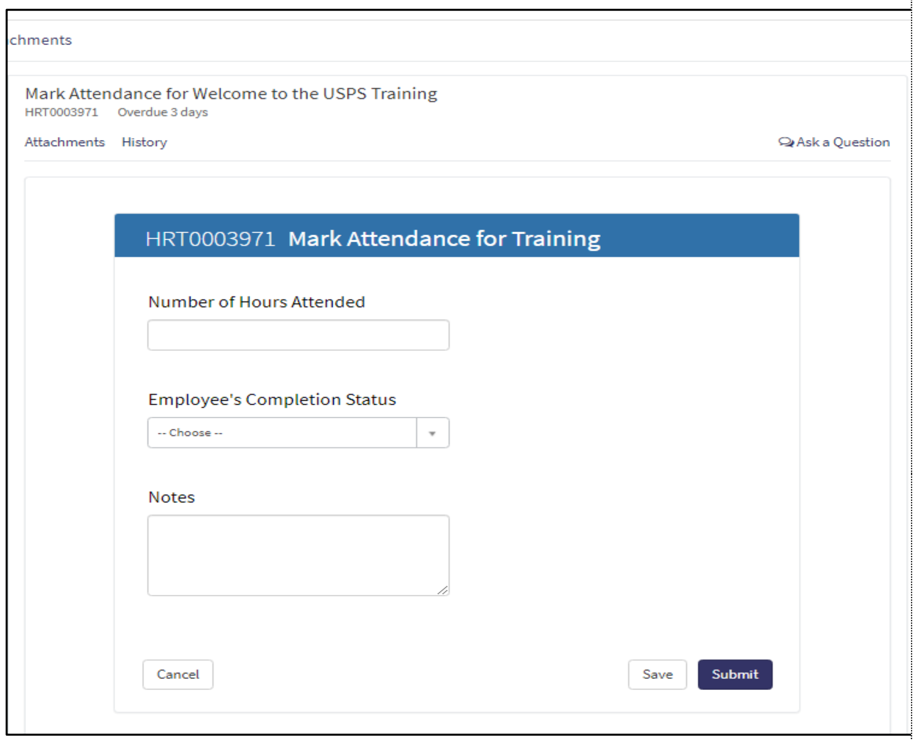
<table>
<tr><th>Important Step</th><th>Visual Aid</th></tr>
<tr><td>1. (When logged in) From the Home Screen click on a Training Session or click on “View All” to view all training sessions. The training session details will open.</td><td>
</td></tr>
<tr><td>2. Enter the attendance for each new hire: number of hours attended, status and notes.</td><td rowspan="2">
</td></tr>
<tr><td>3. Click “Log Attendance and Close Training” button. Each New Hire Case will be updated with the attendance details set.</td></tr>
</table>

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.

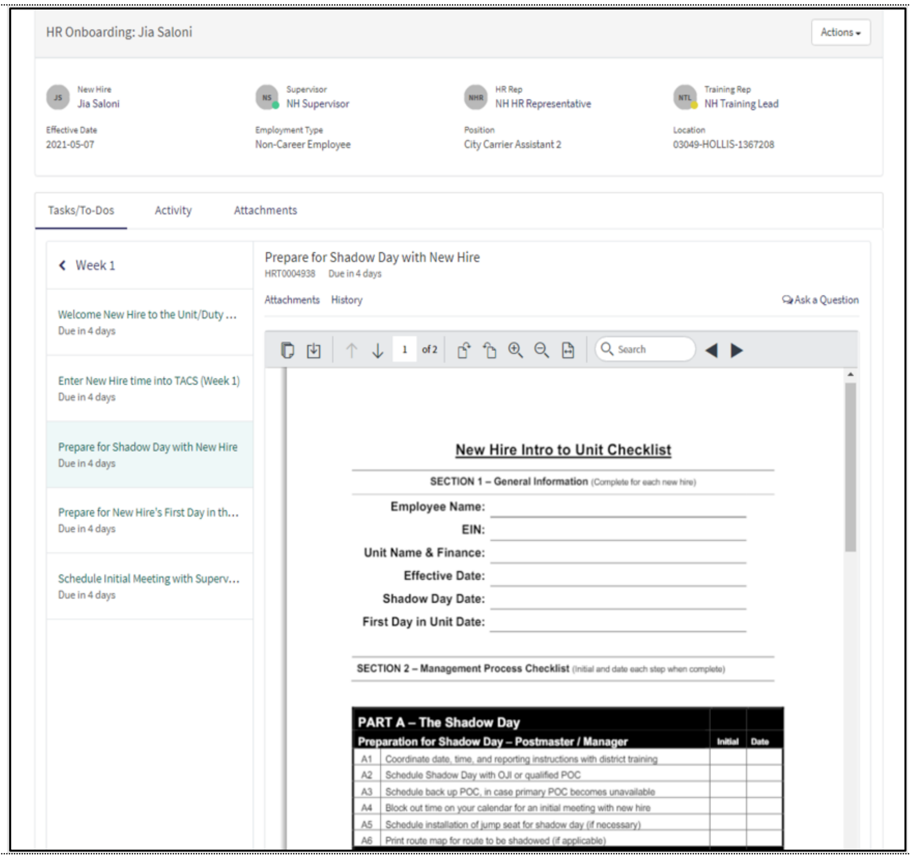
Important Step	Visual Aid
1. (When logged in and with the New Hire Case open). Click on the “Submit Hours & Attendance for [training session]” To-Do where [training session] is the name of the training session. The To-Do will open. **Note**: You will first need to click on the activity set that the training session belongs to. The “Mark Attendance for Training” to-do belongs to the *Week 1* activity set.	
2. Enter the number of hours attended, status and notes. Then click “Submit”. The training attendance will be applied to the New Hire Case. **Note:** The Trainer can select a completion status of “**Partial Attendance**” and indicate in the notes the reason (“Has a family emergency”, etc.). <u>**DO NOT ENTER ANY MEDICAL INFORMATION.**</u> Trainers can also select “**No Show**” status to indicate that the new hire did not show up to the training session. Separate action can then be taken to either close the new hire case due to separation or reschedule a new training session.	

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.

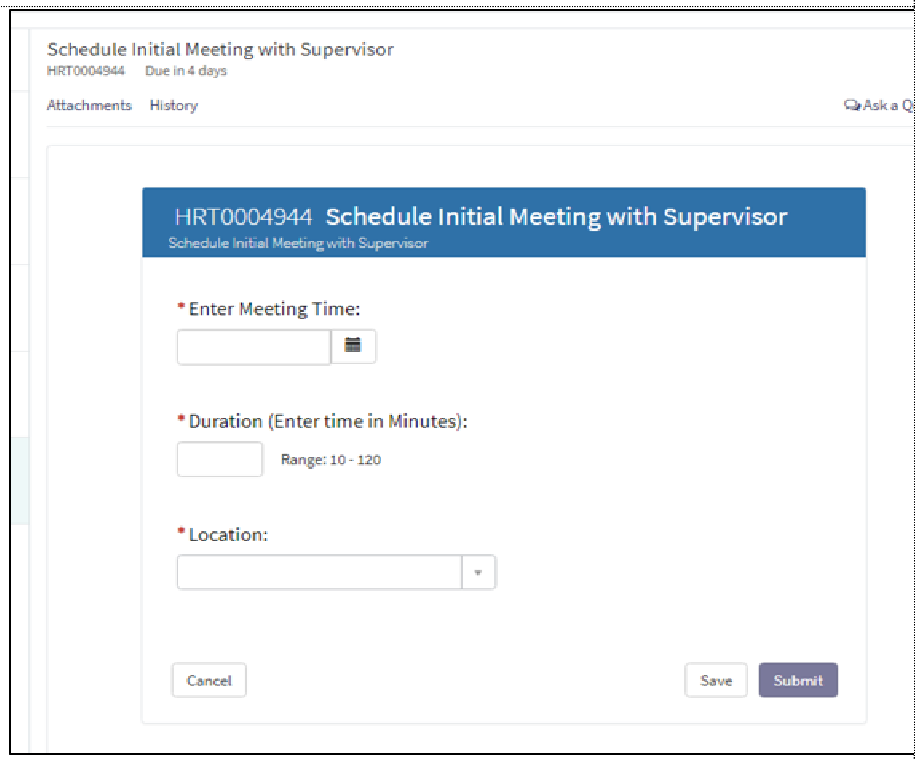
Important Step	Visual Aid
1. (When logged in and with the New Hire Case open). Navigate to a "Prepare for Shadow Day with New Hire" To-Do on a New Hire Case. **Note**: You will first need to click on the activity set that the to-do belongs to. The "Prepare for Shadow Day with New Hire" to-do belongs 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.	

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.

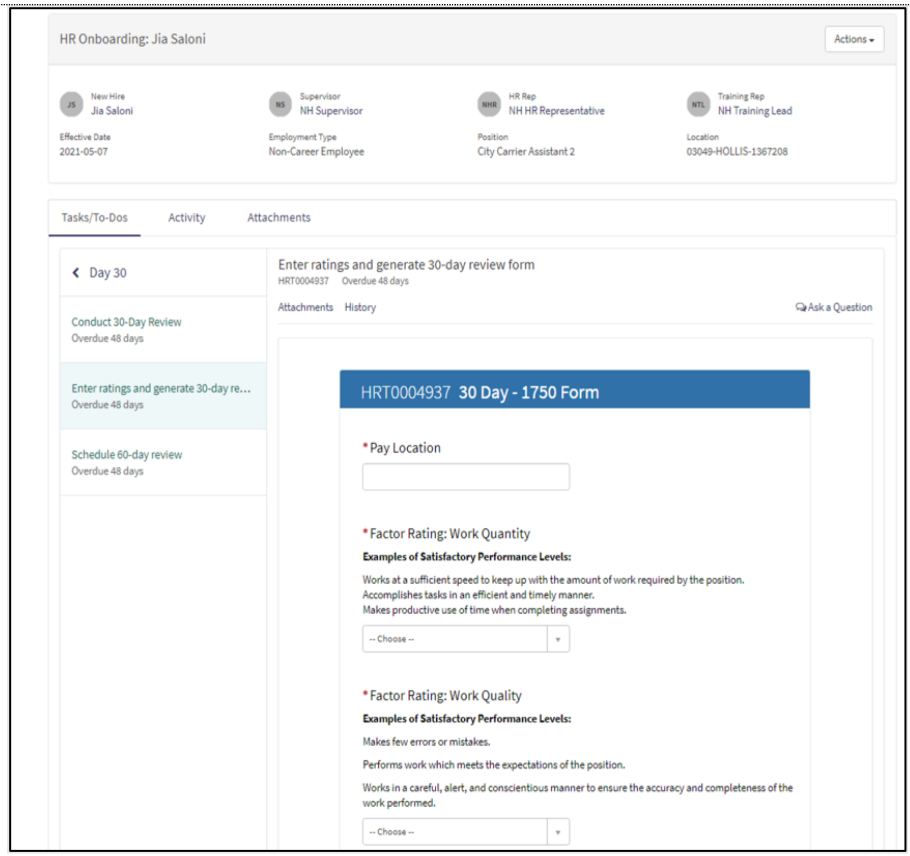
Important Step	Visual Aid
(When logged in and with the New Hire Case open). Navigate to a "Schedule [initial, 30, 60 or 80-Day] Meeting with Supervisor" To-Do. **Note**: You will first need to click on the activity set that the to-do belongs to. The "Schedule Initial Meeting with Supervisor" to-do belongs to the *Week 1* activity set. 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.	
1. Fill out the details of the review and click Submit Select a Date Select a Time Set duration (minutes) Select Location	

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
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. **Note**: these same steps apply for initial, 30-day, 60-day and 80-day reviews. This guide will use 30-day as an example. 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.	
2. Complete the 30 Day – 1750 form	

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®

Employee Evaluation and/or Probationary Report
(See Instructions on Reverse)

1. Employee's Name *(First, MI, Last)* Jia Saloni			2. Employee Social Security Number 061359902	
3. Title City Carrier Assistant 2		4. Pay Location 123	5. Appointment Date 2021-05-07	6. Date Probationary Period Ends 2021-08-05

7a. Complete 30-Day Report By: 2021-06-05	8a. Complete 60-Day Report By: 2021-07-05	9a. Complete 80-Day Report By: 2021-07-25	10a. Complete Year End Report By: 2022-05-06
7b. Enter Factor Rating *(O, S, U, NO)* A O B O C S D O E S F S	8b. Enter Factor Rating *(O, S, U, NO)* A__ B__ C__ D__ E__ F__	9b. Enter Factor Rating *(O, S, U, NO)* A__ B__ C__ D__ E__ F__	10b. Enter Factor Rating *(O, S, U, NO)* A__ B__ C__ D__ E__ F__
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)*	

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)*.

O = *OUTSTANDING*   S = *SATISFACTORY*   U = *UNACCEPTABLE*   NO = *NOT OBSERVED*

Factor	Examples of Satisfactory Performance Levels
A. Work Quantity	■ 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.
B. Work Quality	■ 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.
C. Dependability	■ Completes work assignments without unnecessary supervision. ■ Takes responsibility for completing his/her own work. ■ Reports to work on time. ■ Demonstrates satisfactory attendence.
D. Work Relations	■ Maintains positive working relationships with others. ■ Works harmoniously with others in getting the work done. ■ Cooperates well with co-workers, supervisors, and others with whom he/she comes into contact.
E. Work Methods	■ Handles equipment and/or work materials in an appropriate manner. ■ Consistently observes proper safety rules and practices. ■ Understands and follows oral and/or written instructions.
F. Personal Conduct	■ Conducts himself/herself in a manner appropriate to the work setting. ■ Maintains an appropriate appearance for the position. ■ Demonstrates a positive approach toward work, co-workers, and supervisors. ■ Demonstrates a willingness to handle all assignments. ■ Demonstrates flexibility in moving from one task to another as needed.

Have Expectations Been Jointly Discussed?
☒ Yes ☐ No Initials: ______ *(Supervisor)* ______ *(Employee)*

Would You Recommend This Person for Retention or Rehire?
☒ Yes ☐ No Initials: ______ *(Supervisor)*

Please Explain or Provide Additional Comments Below:

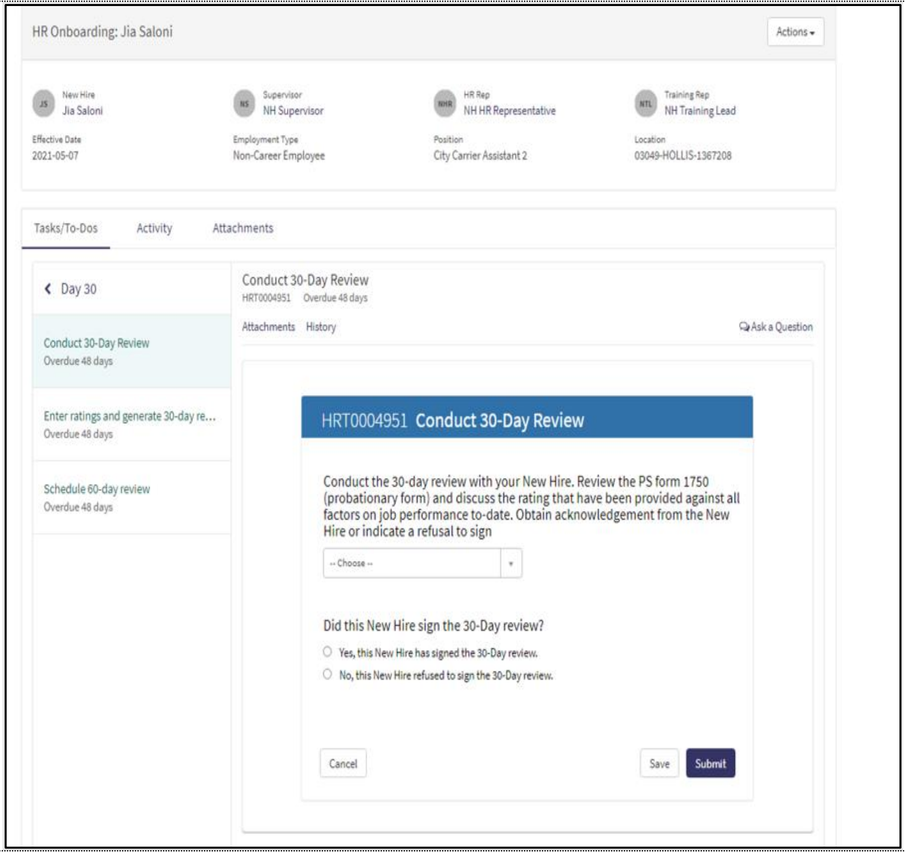
PS Form **1750**, August 1994 **1 - Forward to Designated Postal Official**

4. 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.

5. Fill out the Conduct 30-Day Review form and click "Submit"

   Note: Your next step should be scheduling the next review.



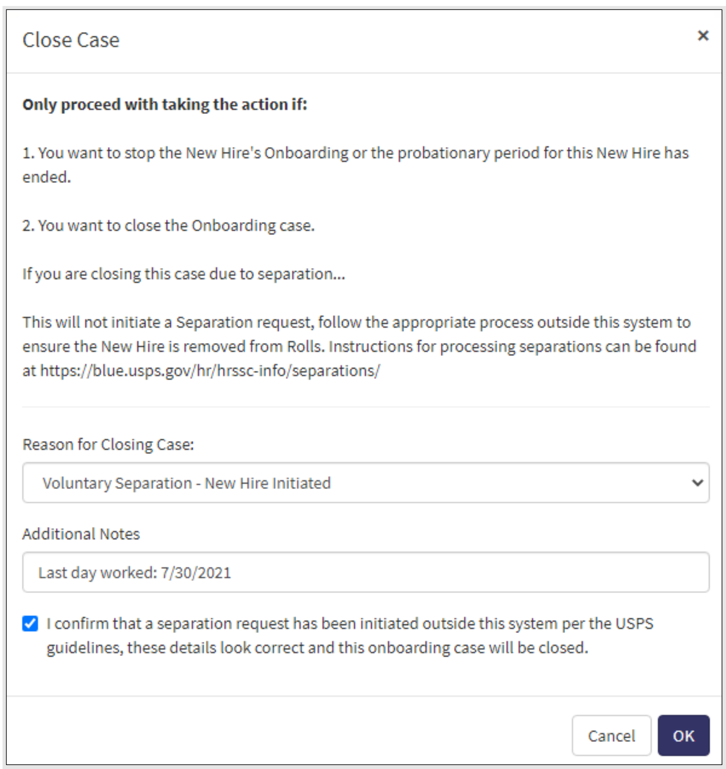
Close a New Hire Case

Navigation: **Home > New Hire Case > Action Menu > Close Case**

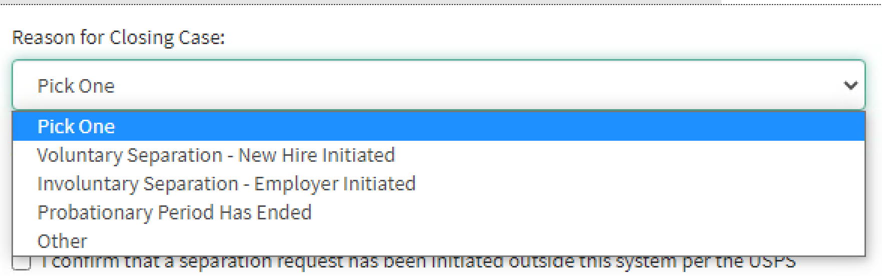
How to close a new hire case.

The HR Onboarding Pilot allows Supervisors and other users to close new hire cases.

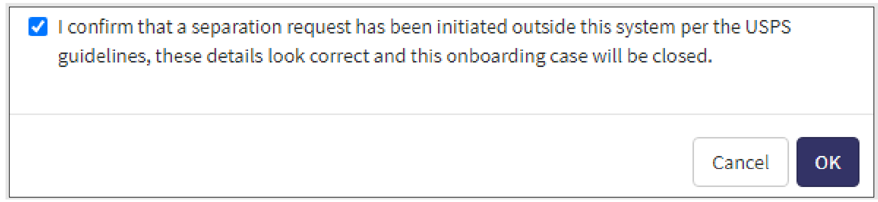
<table>
<tr><th>Important Step</th><th>Visual Aid</th></tr>
<tr><td>1. (When logged in and with the New Hire Case open). Select the Actions dropdown menu located on the right side of the New Hire Case title, which states “Close Onboarding Case”. The Close Case dialog will open.</td><td>



</td></tr>
<tr><td>2. In the “Reason for Closing Case” dropdown select a reason then provide additional high-level notes if “Other” is selected (example “Duplicate record”).</td><td>



</td></tr>
</table>

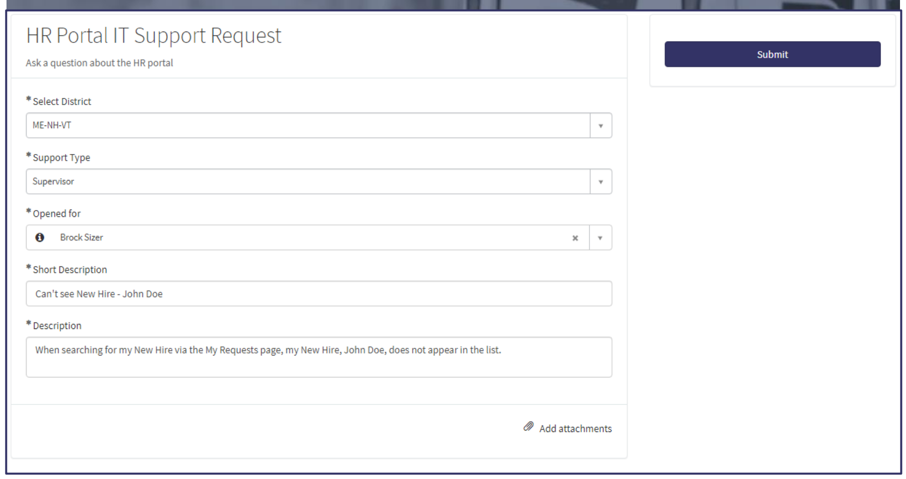
3. Check the “confirm closure” checkbox and click “Close Case”. The case will close.	

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
2. (When logged in). Select “Support Requests” navigation dropdown then select “Submit a Support Request”	
3. Fill out the HR Portal IT Support Request form with the following details: • Your district • Your role (or the role needing support) • The user this request is being opened for (yourself or another user) • A short one sentence description • A longer description of the issue/question with more detail. **Note:** You can review the status of an existing request by selecting “Support Requests” navigation dropdown then selecting “My Support Requests”	

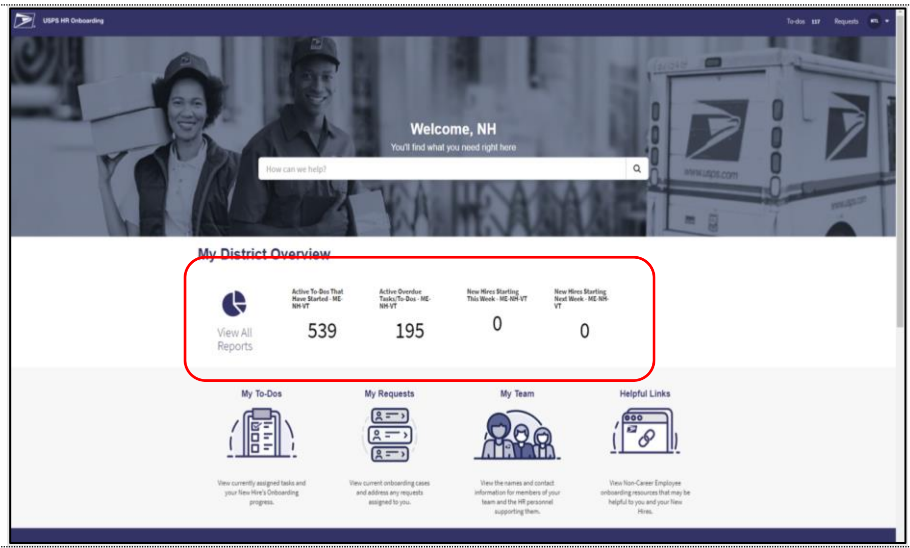
View Active HR Cases and Active To-Do Reports

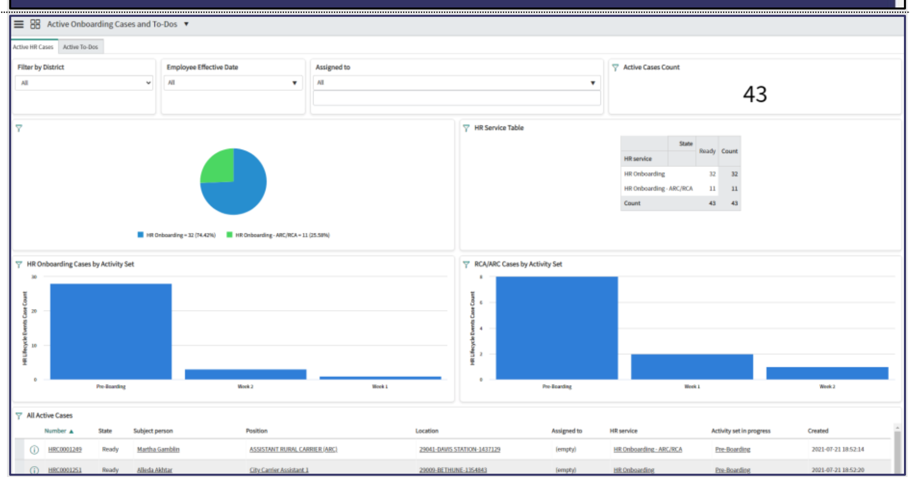
Navigation: **ServiceNow > Dashboard and Reporting**

How to view reports through ServiceNow interface.

You can view Active HR Cases and Active To-Do Reports for the HR Onboarding Pilot.

<table>
<tr><th>Important Step</th><th>Visual Aid</th></tr>
<tr><td>1. (When logged in and on the home screen). Click the “View All Reports” icon to view reports

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.</td><td>
</td></tr>
<tr><td>2. View the Active HR Cases report

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
Assigned To
Due Date</td><td>
</td></tr>
</table>

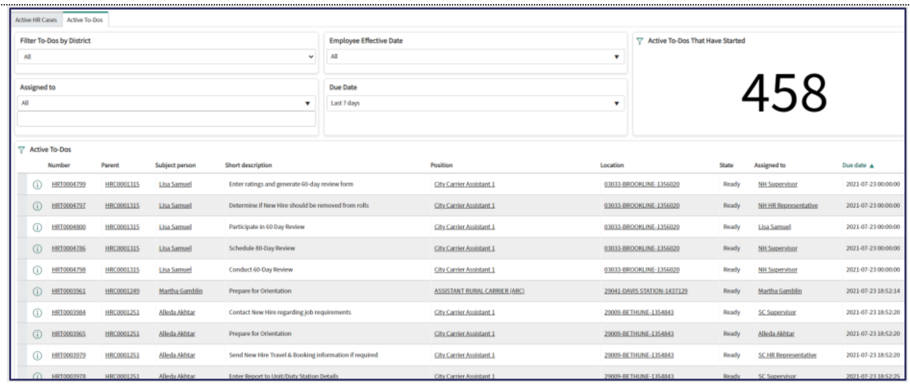
3. View the Active To-Dos report

Metrics/Reports

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

Filters

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

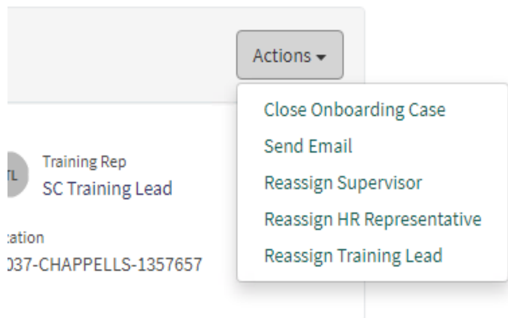
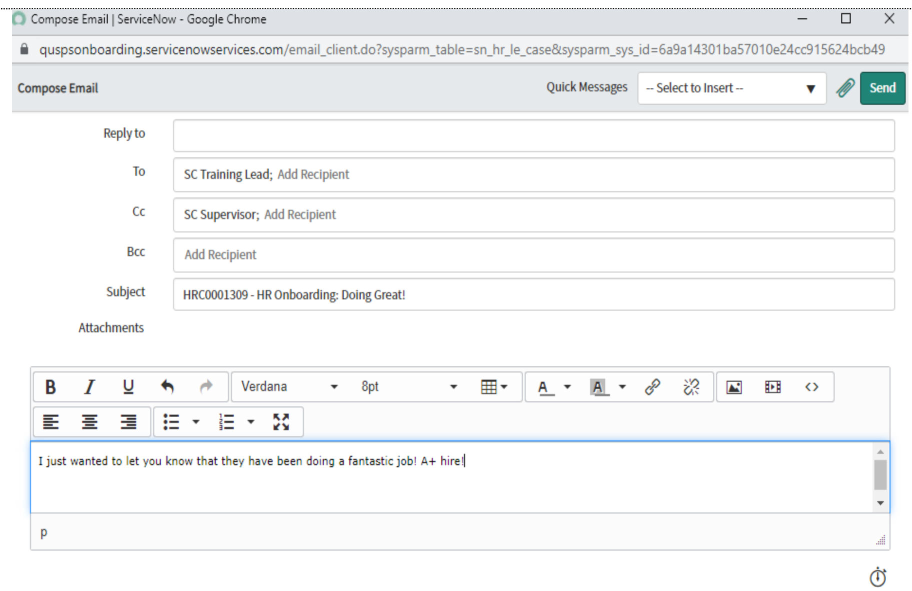


Sending an Email to Another System User Through ServiceNow

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.

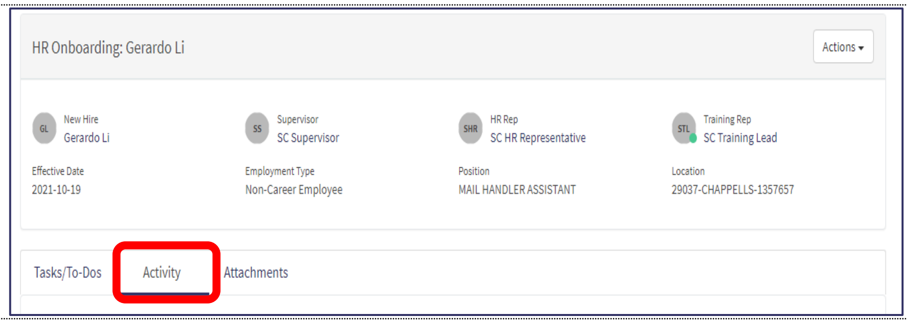
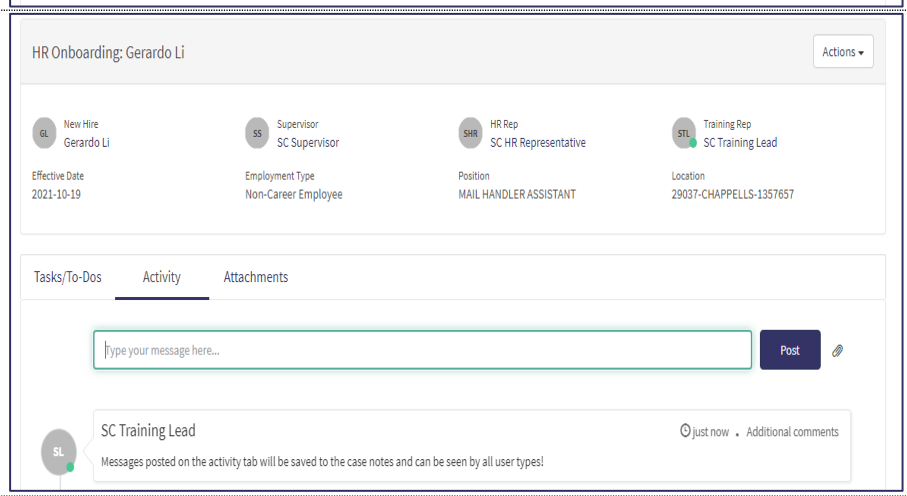
Important Step	Visual Aid
1. (When logged in and with the New Hire Case open). Click the Actions dropdown menu. Then select “Send Email”.	
2. Fill out the Compose Email form. You can use the “Quick Messages” dropdown in the top-right to select a template message.	

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.

<table>
<tr><th>Important Step</th><th>Visual Aid</th></tr>
<tr><td>1. (When logged in and with the New Hire Case open). Click the Activity tab.</td><td>
</td></tr>
<tr><td>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.</td><td>
</td></tr>
</table>

Onboarding Activities & Activity Sets

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.

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)

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
(Notification) New Hire is sent a Welcome Email	(Automated) New Hire Records created in Service Now	(Notification) Supervisor is copied on the Orientation and other training notification email(s) sent to the New Hire	(Manual) Coordinate with HR/Supervisor to schedule New Hire for Orientation and other required training
(Notification) New Hire is sent an Orientation Notification email so they can prepare for Orientation	(Manual) Coordinate with LDD Trainer/Supervisor to schedule New Hire for Orientation and other required training	(Manual) Contact New Hire regarding job requirements including work hours, days off and approximate number of hours per week	
(Notification) New Hire is sent other required training email notifications	(Manual) Book travel/lodging for New Hire Orientation (if new hire must drive more than 50 miles to the training site)	(Manual) Enter Report to Unit/Duty Station Details	
(Manual) (Notification) New Hire receives travel and booking info (if required to drive more than 50 miles to training site). *Sent manually.*			

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
Complete 4-day Rural or City Carrier Academy Training (if applicable)	File Onboarding Forms from PEDC Trainer	Enter New Hire's time into TACS	Trainer facilitates New Hire training
Complete Sales and Services Associate (Window) Training (if applicable)	Notify HRSSC Onboarding when forms are available for upload to eOPF	Supervisor sent an email reminder prior to Initial Probationary Review meeting	Capture attendance and time (daily) for required training
Report to Unit/Duty station (RCA/CCA)		Conduct Initial Probationary Review meeting with New Hire	Trainer sends New Hire Timecard to Unit Supervisor
Complete On the Job Training (OJT) (if applicable)		Supervisor sent an email reminder to schedule the 30-Day Review	Trainer updates Training in HERO to identify which training courses have been completed
Participate in Initial Probationary Review meeting		Schedule 30-Day Review w/ New Hire	Trainer mails completed hard copy Onboarding Forms to HR

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
Participate in 80-Day Review	HR is sent an email notification if the New Hire is not recommended for retention following their review	Enter ratings and generate 80-Day review form (PS Form 1750)	No Activities
Acknowledge 80-Day Review	If New Hire is not recommended for retention, remove from rolls per Supervisor recommendation	Conduct 80-Day Review w/ New Hire	
Complete additional training (if required)	HRSSC sent an email if the New Hire's case is closed in Service Now	Acknowledge review was held and indicate whether employee signed	
New hire receives a copy of Form 1750 Page 2	HR is sent an email when the New Hire case is closed	Mail HR complete forms & provide copy to New Hire	
Probationary Period Ends	Notify HRSSC when Probationary forms are available for upload to eOPF	Close case due to separation if New Hire is not recommended for retention	
New Hire receives Written Notification if released		Supervisor sent an email when the New Hire case is closed	

Automated Manual Notification External