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
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!
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

<table>
<thead>
<tr>
<th>Module</th>
<th>Topic Covered</th>
<th>Est. Time (min)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Portal (Homepage widgets, My Requests Page, My To-Dos Page, My Team Page, Helpful Links)</td>
<td>5</td>
</tr>
<tr>
<td>2.</td>
<td>Dashboard &amp; Reporting (Navigating to Dashboard, Dashboard tabs, Dashboard filters)</td>
<td>5</td>
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<td>3.</td>
<td>Workflow – Supervisor Tasks</td>
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<td>5.</td>
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<td>6.</td>
<td>Cancelling a case</td>
<td>5</td>
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<td>7.</td>
<td>Communications (Creating quick messages &amp; using them from Actions UI)</td>
<td>10</td>
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<tr>
<td>8.</td>
<td>Reassignment</td>
<td>5</td>
</tr>
<tr>
<td>9.</td>
<td>Submitting a Support Request</td>
<td>5</td>
</tr>
</tbody>
</table>
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**

<table>
<thead>
<tr>
<th>FY21</th>
<th>FY22</th>
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</thead>
<tbody>
<tr>
<td></td>
<td>SEP</td>
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<tr>
<td>Pilot Training (9/7-16)</td>
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<td>Pilot (9/17 – 12/31)</td>
<td></td>
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<tr>
<td>Analyze Results and Feedback</td>
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</tr>
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</table>
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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
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60 DAY
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NOTE: Shadow Days only apply to newly hired city and rural carriers. If the Shadow Day is not applicable to a newly hired employee, you do not need to complete the action in the HR Onboarding Pilot System.

NOTE: RCA/ARCs will end System Process at the end of Week 2.
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.
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
The HR Onboarding “Training Widget” provides a convenient method for Trainers to create, schedule, and mark attendance for orientation and training sessions in bulk

Schedule a Training Session:
- Trainers can use this functionality to schedule/create various training sessions

Add Attendees:
- Trainers can add attendees while they are creating the training as well as at a later time
The HR Onboarding “Training Widget” provides a convenient method for Trainers to create, schedule, and mark attendance for orientation and training sessions in bulk.

**Edit Session Details:**
- Trainers can change details of the session (e.g., in case of rescheduling a training)

**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

![Dashboard & Reporting – Active To-Dos](image)

**NOTE:** HR Onboarding Pilot fulfiller users (Supervisors, Trainers, HR Representatives) can create their own reports and share the report with specific users and/or groups. Instructions in the corresponding Lab.
Module 3

Workflow - Supervisor Tasks
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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
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**Workflow – Preboarding Tasks**

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

**NOTE:** If the task is completed prior to the New Hire’s effective date, a system generated email containing the relevant information will be sent. However, if the task is completed past the New Hire’s effective date, no system generated email will be sent to the New Hire and it will be the responsibility of the Supervisor to communicate the relevant information to the New Hire outside the HR Onboarding Pilot system.
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.
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Schedule Shadow Day:
If applicable Supervisors can use this task to schedule the date a New Hire has to attend Shadow Day. Once the task is marked complete by the Supervisor, an email is sent to the New Hire with the information to prepare for Shadow Day including the date and location.

**NOTE:** If the task is completed prior to the New Hire’s effective date, a system generated email containing the relevant information will be sent. However, if the task is completed past the New Hire’s effective date, no system generated email will be sent to the New Hire and it will be the responsibility of the Supervisor to communicate the relevant information to the New Hire outside the HR Onboarding Pilot system.
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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.
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.
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.
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**WEEK 2**
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**60 DAY**
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**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.
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.
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30 DAY
My Supervisor has provided me with very clear feedback, and I was able to clarify my questions and expectations without issue.
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

#### Process Description
- **Populated from the Enter Ratings Task**
- **Populated from the New Hire’s HR Profile**

<table>
<thead>
<tr>
<th>Factor</th>
<th>Examples of Satisfactory Performance Levels</th>
</tr>
</thead>
<tbody>
<tr>
<td>A. Work Quantity</td>
<td>- Works at a sufficient speed to keep up with the amount of work required for the position.</td>
</tr>
<tr>
<td>B. Work Quality</td>
<td>- Completes tasks in an efficient and timely manner.</td>
</tr>
<tr>
<td>C. Dependability</td>
<td>- Takes responsibility for completing his/her own work.</td>
</tr>
<tr>
<td>D. Work Relations</td>
<td>- Maintains positive working relationships with others.</td>
</tr>
<tr>
<td>E. Work Methods</td>
<td>- Handles equipment and work materials in an appropriate manner.</td>
</tr>
<tr>
<td>F. Personal Conduct</td>
<td>- Demonstrates flexibility in moving from one task to another as needed.</td>
</tr>
</tbody>
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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.

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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.

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

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

38
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

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 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.

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Workflow – Day 80 Tasks

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

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Module 4

Workflow - Trainer Tasks
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Schedule New Hire for Welcome to USPS Orientation (if applicable):
Trainees 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.*
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NOTE: RCA/ARCs will end System Process at the end of Week 2

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

*NOTE: Depending on the New Hire’s occupation code and training plan, this may include more than one task.*
I accepted my offer and 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 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.

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.

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

NOTE: RCA/ARCs will end System Process at the end of Week 2.
Workflow – Week 2 Tasks

Mark Attendance for ___ Training:
This task will allow the Trainer to capture attendance and hours of attendance for the New Hire’s various training(s).

**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
I accepted my offer and am looking forward to receiving information on next steps. I was able to complete the “Welcome to USPS” training without issue. The Orientation team was very helpful and well-coordinated. 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.

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

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

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

I’m glad I had the opportunity to improve since the previous review. My second review went exactly as I expected. 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.
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.
I accepted my offer and 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.

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.

WEEK 2
I’m excited to finally take part in a Shadow Day and On the Job training to learn more about my job.

60 DAY
I’m glad I had the opportunity to improve since the previous review. My second review went exactly as I expected.

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

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.
I accepted my offer and 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 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.

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.

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.

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.
I accepted my offer and I 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.

**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.

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

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

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

**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.

**90 DAY**
Finally! My last review went well, and I am a part of the team. The whole process went smoother than 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.
I accepted my offer and 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 1
There was lots to do this week, Onboarding Forms, Driver Training, and additional Orientation Training, but so far everything is going very smoothly.

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 2
I’m excited to finally take part in a Shadow Day and On the Job training to learn more about my job.

60 DAY
I’m glad I had the opportunity to improve since the previous review. My second review went exactly as I expected.

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

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.

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.
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

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 any New Hire must be closed manually in the event of a separation from USPS.
Module 7

Communication
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
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.
Automated/System Generated Emails

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

*NOTE: If the task is completed prior to the New Hire’s effective date, a system generated email containing the relevant information will be sent. However, if the task is completed past the New Hire’s effective date, no system generated email will be sent to the New Hire and it will be the responsibility of the Supervisor, Trainer, or HR Representative to communicate the relevant information to the New Hire outside the HR Onboarding Pilot system. Users should not send any email to the New Hire from the system after the New Hire’s effective date.
Module 8

Reassignment
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
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
<table>
<thead>
<tr>
<th>Lab/Activity #</th>
<th>Topic Covered</th>
<th>Est. Time (min)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Onboarding Portal Overview (Homepage widgets, My Requests Page, My To-Dos Page, My Team Page, Helpful Links)</td>
<td>10</td>
</tr>
<tr>
<td>2.</td>
<td>Training Portal Overview (Homepage widgets, My Requests Page, My To-Dos Page, My Team Page, Helpful Links, Training Widget)</td>
<td>10</td>
</tr>
<tr>
<td>3.</td>
<td>Training Widget (Scheduling training, updating training sessions, bulk updates for attendance)</td>
<td>10</td>
</tr>
<tr>
<td>4.</td>
<td>Dashboard (Navigating to Dashboard, Dashboard tabs, Dashboard filters)</td>
<td>5</td>
</tr>
<tr>
<td>5.</td>
<td>Reporting Running/Creating ad-hoc reports</td>
<td>5</td>
</tr>
<tr>
<td>6.</td>
<td>Supervisor Tasks</td>
<td>60</td>
</tr>
<tr>
<td>7.</td>
<td>Trainer Tasks</td>
<td>30</td>
</tr>
<tr>
<td>8.</td>
<td>HR Representative Tasks</td>
<td>20</td>
</tr>
<tr>
<td>9.</td>
<td>Cancelling a case</td>
<td>5</td>
</tr>
<tr>
<td>10.</td>
<td>Communications (Creating quick messages &amp; using them from Actions UI)</td>
<td>10</td>
</tr>
<tr>
<td>11.</td>
<td>Reassignment</td>
<td>5</td>
</tr>
<tr>
<td>12.</td>
<td>Submitting a Support Request</td>
<td>5</td>
</tr>
<tr>
<td>13.</td>
<td>Working a Support Request</td>
<td>5</td>
</tr>
</tbody>
</table>
1. Navigate to the HR Onboarding Portal ([https://quspsonboarding.servicenowservices.com/onboarding](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
   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
1. Navigate to the HR Training Portal ([https://quspsonboarding.servicenowservices.com/training](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
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
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.
   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”
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.
1. Navigate to the HR Onboarding Portal (https://quspsonboarding.servicenowservices.com/onboarding) and click ‘View All Reports’ under ‘My Overview’ to navigate to the backend view of the HR Onboarding Pilot system

2. Type ‘Reporting’ in the filter navigator to navigate to HR Dashboard & Reports > Reports

3. Click through the different tabs to familiarize yourself with the different reports available for you to view in the HR Onboarding Pilot system
   1. My Reports: Reports created by the logged in user
   2. Group: Reports shared with the logged in user via group or user
   3. Global: Reports that are shared as global
   4. All: All reports accessible by the logged in user

4. Create a new report using the ‘Create a Report’ button
   1. Data: Populate a name for the report, select ‘Table’ for data source, and select ‘HR Lifecycle Event Cases’ OR ‘HR Tasks’ to generate a report for the HR Onboarding Pilot data
   2. Type: Select a type of report you would like to use to display the data (e.g. Pie Chart, Bar Graph, etc.)
   3. Configure: Select how you would like to group the data.
   4. Style: Update the color palette, size, and format

5. Click ‘Run’ to generate the report. Make changes as needed and click ‘Save’ to save the report.

6. Click ‘Share’ to share the report with a specific group or user
Lab 6

Supervisor Tasks
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
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
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’
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**
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

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.
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

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.
1. Navigate to the HR Onboarding Portal ([https://guspsonboarding.servicenowservices.com/onboarding](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 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

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
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.
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.
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’


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://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. 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
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. 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
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.
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. 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
1. Navigate to the HR Onboarding Portal (https://gusponboarding.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.
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.
1. Navigate to the HR Onboarding Portal (https://quspsonboarding.servicenowservices.com/onboarding) and click ‘View All Reports’ under ‘My Overview’ to navigate to the HR Onboarding Dashboard.

2. Type ‘Quick Messages’ in the filter navigator
   1. Select Email Client > Quick Messages
   2. Click ‘New’
   3. Populate the mandatory fields, make sure the 'active' field is checked and the table field is populated with 'HR Lifecycle Events Case', and click 'Submit'.

3. Navigate to the HR Onboarding Portal (https://quspsonboarding.servicenowservices.com/onboarding) and click ‘My Requests’ to view a list of all open HR Onboarding Requests.

4. Select a request that is not closed or cancelled.
5. Click the ‘Actions’ button on the HR case view. The drop-down is expanded and the following values are displayed:
   1. Send Email
   2. Close Onboarding Case
   3. Reassign Supervisor
   4. Reassign HR Representative
   5. Reassign Training Lead

6. Click ‘Send Email’
   1. Click the Quick Messages drop-down on top right
   2. Populate the ‘To’ field and click ‘Send’

7. Click 'Activity' tab near middle of page to confirm an entry was added to indicate the email was sent
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’
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’
1. Navigate to the HR Onboarding Portal (https://quspsonboarding.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!
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

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

<table>
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<tr>
<th></th>
<th>FY21</th>
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<tbody>
<tr>
<td></td>
<td>SEP</td>
<td>OCT</td>
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<tr>
<td>Pilot Training (9/7-16)</td>
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<td>Pilot (9/17 – 12/31)</td>
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<tr>
<td>Analyze Results and Feedback</td>
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</table>
I accepted my offer and 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 1
There was lots to do this week, Onboarding Forms, Driver Training, and additional Orientation Training, but so far everything is going very smoothly.

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

WEEK 2
I’m excited to finally take part in a Shadow Day and On the Job training to learn more about my job.

60 DAY
I’m glad I had the opportunity to improve since the previous review. My second review went exactly as I expected.

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.

90 DAY
Finally! My last review went well, and I am a part of the team. The whole process went smoother than I expected.
HR Representative Roles & Responsibilities

- Make travel and accommodation arrangements if necessary
- Ensure necessary processes are followed in case of a separation
- Coordinate with trainers and supervisors to complete and file onboarding paperwork
Module 1

HR Onboarding Portal
• **Environment URL and Access:**
  • Onboarding Portal
    • CAT URL: [https://quspsonboarding.servicenowservices.com/onboarding](https://quspsonboarding.servicenowservices.com/onboarding)
    • PROD URL: [https://uspsonboarding.servicenowservices.com/onboarding](https://uspsonboarding.servicenowservices.com/onboarding)
  • Training Portal
    • CAT URL: [https://quspsonboarding.servicenowservices.com/training](https://quspsonboarding.servicenowservices.com/training)
    • PROD URL: [https://uspsonboarding.servicenowservices.com/training](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.
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
• **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
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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.

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.

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

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

NOTE: RCA/ARCs will end System Process at the end of Week 2.
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.
I accepted my offer and 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 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

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

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

80 DAY
I'm glad I had the opportunity to improve since the previous review. My third review went exactly as I expected.
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.
I accepted my offer and 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 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: 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.

60 DAY
I’m glad I had the opportunity to improve since the previous review. My second review went exactly as I expected.

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

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

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

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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

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 any New Hire must be closed manually in the event of a separation from USPS.

Closure Reason:
When closing a case, the user must identify a reason. Provide additional high-level notes if “Other” is selected (example “Duplicate record”).
Module 5

Communications
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.
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.
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
<table>
<thead>
<tr>
<th>Lab/Activity #</th>
<th>Topic Covered</th>
<th>Est. Time (min)</th>
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<tbody>
<tr>
<td>1.</td>
<td>Portal (Homepage widgets, My Requests Page, My To-Dos Page, My Team Page, Helpful Links, Training Widget (High Level ONLY))</td>
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<td>Dashboard (Navigating to Dashboard, Dashboard tabs, Dashboard filters)</td>
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<td>3.</td>
<td>Reporting (Running/Creating) ad-hoc reports</td>
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<tr>
<td>4.</td>
<td>Pre-Boarding Tasks (Send New Hire Travel &amp; Booking Information)</td>
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<tr>
<td>5.</td>
<td>Week 1 Tasks (Remove New Hire from Rolls if Applicable)</td>
<td>5</td>
</tr>
<tr>
<td>6.</td>
<td>Day 30 Tasks (Remove New Hire from Rolls if Applicable)</td>
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<td>7.</td>
<td>Day 60 Tasks (Remove New Hire from Rolls if Applicable)</td>
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<tr>
<td>8.</td>
<td>Day 80 Tasks (Remove New Hire from Rolls if Applicable)</td>
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<tr>
<td>9.</td>
<td>Closing a ServiceNow HR Onboarding cases</td>
<td>5</td>
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<tr>
<td>10.</td>
<td>Communications (Creating quick messages &amp; using them from Actions UI)</td>
<td>10</td>
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<tr>
<td>11.</td>
<td>Reassignment</td>
<td>5</td>
</tr>
<tr>
<td>12.</td>
<td>Submitting a Support Request</td>
<td>5</td>
</tr>
</tbody>
</table>
1. Navigate to the HR Onboarding Portal ([https://quspsonboarding.servicenowservices.com/onboarding](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
1. Navigate to the HR Onboarding Portal (https://quspsonboarding.servicenowservices.com/onboarding) and click ‘View All Reports’ under ‘My Overview’ to navigate to the backend view of the HR Onboarding Pilot system.

2. Type ‘Reporting’ in the filter navigator to navigate to HR Dashboard & Reports > Reports.

3. Click through the different tabs to familiarize yourself with the different reports available for you to view in the HR Onboarding Pilot system:
   1. My Reports: Reports created by the logged in user
   2. Group: Reports shared with the logged in user via group or user
   3. Global: Reports that are shared as global
   4. All: All reports accessible by the logged in user

4. Create a new report using the ‘Create a Report’ button:
   1. Data: Choose a name for the report, select ‘Table’ for data source, and select ‘HR Lifecycle Event Cases’ OR ‘HR Tasks’ to generate a report for the HR Onboarding Pilot data
   2. Type: Select a type of report you would like to use to display the data (e.g., Pie Chart, Bar Graph, etc.)
   3. Configure: Select how you would like to group the data
   4. Style: Update the color palette, size, and format

5. Click ‘Run’ to generate the report. Make changes as needed and click ‘Save’ to save the report.

6. Click ‘Share’ to share the report with a specific group or user.
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. 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.
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
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.
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. 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
1. Navigate to the HR Onboarding Portal (https://gusps-onboarding.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
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.
1. Navigate to the HR Onboarding Portal (https://quspsonboarding.servicenowservices.com/onboarding) and click ‘View All Reports’ under ‘My Overview’ to navigate to the HR Onboarding Dashboard

2. Type ‘Quick Messages’ in the filter navigator
   1. Select Email Client > Quick Messages
   2. Click ‘New’
   3. Populate the mandatory fields, make sure the 'active' field is checked and the table field is populated with 'HR Lifecycle Events Case', and click ‘Submit’

3. Navigate to the HR Onboarding Portal (https://quspsonboarding.servicenowservices.com/onboarding) and click ‘My Requests’ to view a list of all open HR Onboarding Requests

4. Select a request that is not closed or cancelled.

5. Click the ‘Actions’ button on the HR case view. The drop-down is expanded and the following values are displayed:
   1. Send Email
   2. Close Onboarding Case
   3. Reassign Supervisor
   4. Reassign HR Representative
   5. Reassign Training Lead

6. Click ‘Send Email’
   1. Click the Quick Messages drop-down on top right
   2. Populate the ‘To’ field and click ‘Send’

7. Click 'Activity' tab near middle of page to confirm an entry was added to indicate the email was sent
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

<table>
<thead>
<tr>
<th>Module</th>
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<tbody>
<tr>
<td>1. Portal (Homepage widgets, My Requests Page, My To-Dos Page, My Team Page, Helpful Links)</td>
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<tr>
<td>2. Dashboard &amp; Reporting (Navigating to Dashboard, Dashboard tabs, Dashboard filters)</td>
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<tr>
<td>3. Workflow</td>
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<tr>
<td>3.1 Day 1 Tasks</td>
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<tr>
<td>3.2 Week 1 Tasks</td>
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<tr>
<td>3.3 Week 2 Tasks</td>
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<tr>
<td>3.4 Day 30 Tasks</td>
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<tr>
<td>3.5 Day 60 Tasks</td>
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<tr>
<td>3.6 Day 80 Tasks</td>
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<tr>
<td>4. Cancelling a case</td>
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<tr>
<td>5. Communications (Creating quick messages &amp; using them from Actions UI)</td>
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<tr>
<td>6. Reassignment</td>
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<td>7. Submitting a Support Request</td>
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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

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<thead>
<tr>
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<th>FY21</th>
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<tr>
<td></td>
<td>SEP</td>
<td>OCT</td>
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<tr>
<td>Pilot Training (9/7-16)</td>
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<td>Pilot (9/17 – 12/31)</td>
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<td>Analyze Results and Feedback</td>
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I accepted my offer and 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.

**PRE-BOARDING**

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

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**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.

NOTE: RCA/ARCs will end System Process at the end of Week 2.
Supervisor Roles & Responsibilities

- Supervisors manage the new hire during day-to-day operations.
- Set the schedule for new hire’s onboarding.
- Manage work expectations for the new hire.
- Responsible for completing the 30/60/80-day reviews/paperwork with the new hire and for.
- Coordinating with HR local services regarding recommendations for retention or release.
Module 1

Portal Overview
Portal – URL and Access

• Environment URL and Access:
  • Onboarding Portal
    • CAT URL: https://quspsonboarding.servicenowservices.com/onboarding
    • PROD URL: https://uspsonboarding.servicenowservices.com/onboarding
  • Training Portal
    • CAT URL: https://quspsonboarding.servicenowservices.com/training
    • PROD URL: https://uspsonboarding.servicenowservices.com/training

• All HR Pilot users will have access prior to go-live. However, if users need access to the system after go-live, they can request access following these steps:
  • To request access, email the HR coordinators. HR Coordinators will submit a Support Request in the HR Onboarding Pilot system. The HR Onboarding Pilot Tier 2 team will grant access and notify the HR coordinators. HR Coordinators will notify the users.
**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

**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
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---

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Workflow – Activity Sets

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

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

Note: ARCs/RCAs will not have Day 30, 60, or 80 Activity Sets
I accepted my offer and looking forward to receiving information on next steps.

**DAY 1 (OF ORIENTATION)**

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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 – 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.
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.
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DAY 1 (OF ORIENTATION)
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WEEK 1
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WEEK 2
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Finally! My last review went well, and I am a part of the team. The whole process went smoother than I expected.

80 DAY
I’m glad I had the opportunity to improve since the previous review. My third review went exactly as I expected.
Workflow – Day 1 Tasks

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

NOTE: If the task is completed prior to the New Hire’s effective date, a system generated email containing the relevant information will be sent. However, if the task is completed past the New Hire’s effective date, no system generated email will be sent to the New Hire and it will be the responsibility of the Supervisor to communicate the relevant information to the New Hire outside the HR Onboarding Pilot system.
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NOTE: RCA/ARCs will end System Process at the end of Week 2

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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 – 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.
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.
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.
I accepted my offer and 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 1
There was lots to do this week, Onboarding Forms, Driver Training, and additional Orientation Training, but so far everything is going very smoothly.

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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.

NOTE: RCA/ARCs will end System Process at the end of Week 2.
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.
I accepted my offer and 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.

PRE-BOARDING
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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

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.
I accepted my offer and 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 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: 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.

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

60 DAY
I’m glad I had the opportunity to improve since the previous review. My second review went exactly as I expected.

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

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 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.
I accepted my offer and 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 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.

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.

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.

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

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

**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 any New Hire must be closed manually in the event of a separation from USPS.

**Closure Reason:**
When closing a case, the user must identify a reason. Provide additional high-level notes if “Other” is selected (example “Duplicate record”).
Module 5

Communication
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.
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.
Automated/System Generated Emails

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

*NOTE: If the task is completed prior to the New Hire’s effective date, a system generated email containing the relevant information will be sent. However, if the task is completed past the New Hire’s effective date, no system generated email will be sent to the New Hire and it will be the responsibility of the Supervisor, Trainer, or HR Representative to communicate the relevant information to the New Hire outside the HR Onboarding Pilot system. Users should not send any email to the New Hire from the system after the New Hire’s effective date.
Module 6

Reassignment
Reassigning a Case

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

Tasks are assigned to one of three types of users:
1. Supervisors
2. HR Representatives
3. Training Leads
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
<table>
<thead>
<tr>
<th>Lab/Activity #</th>
<th>Topic Covered</th>
<th>Est. Time (min)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Portal (Homepage widgets, My Requests Page, My To-Dos Page, My Team Page, Helpful Links)</td>
<td>10</td>
</tr>
<tr>
<td>2.</td>
<td>Dashboard (Navigating to Dashboard, Dashboard tabs, Dashboard filters)</td>
<td>5</td>
</tr>
<tr>
<td>3.</td>
<td>Reporting (Running/Creating) ad-hoc reports</td>
<td>5</td>
</tr>
<tr>
<td>4.</td>
<td>Pre-Boarding Tasks Scheduling Report to Duty Station, Supervisor Checklist</td>
<td>10</td>
</tr>
<tr>
<td>5.</td>
<td>Day 1 Tasks (Scheduling Shadow Day)</td>
<td>5</td>
</tr>
<tr>
<td>6.</td>
<td>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)</td>
<td>10</td>
</tr>
<tr>
<td>7.</td>
<td>Week 2 Tasks (Schedule 30-Day Review, Conduct Initial Meeting With Supervisor, Enter New Hire Time into TACS (Week 2))</td>
<td>10</td>
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<tr>
<td>8.</td>
<td>Day 30 Tasks (Form 1750, Scheduling Day 60 Review)</td>
<td>10</td>
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<tr>
<td>9.</td>
<td>Day 60 Tasks (Form 1750, Scheduling Day 80 Review)</td>
<td>10</td>
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<tr>
<td>10.</td>
<td>Day 80 Tasks (Form 1750)</td>
<td>5</td>
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<tr>
<td>11.</td>
<td>Cancelling a case</td>
<td>5</td>
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<tr>
<td>12.</td>
<td>Communications (Creating quick messages &amp; using them from Actions UI)</td>
<td>10</td>
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<tr>
<td>13.</td>
<td>Reassignment</td>
<td>5</td>
</tr>
<tr>
<td>14.</td>
<td>Submitting a Support Request</td>
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</tr>
</tbody>
</table>
1. **Navigate to the HR Onboarding Portal** ([https://quspsonboarding.servicenowservices.com/onboarding](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
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.
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
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
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’
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**
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
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
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

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
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

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.
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
1. Navigate to the HR Onboarding Portal (https://quspsonboarding.servicenowservices.com/onboarding) and click ‘View All Reports’ under ‘My Overview’ to navigate to the HR Onboarding Dashboard

2. Type ‘Quick Messages’ in the filter navigator
   1. Select Email Client > Quick Messages
   2. Click ‘New’
   3. Populate the mandatory fields, make sure the 'active' field is checked and the table field is populated with 'HR Lifecycle Events Case', and click 'Submit'

3. Navigate to the HR Onboarding Portal (https://quspsonboarding.servicenowservices.com/onboarding) and click ‘My Requests’ to view a list of all open HR Onboarding Requests

4. Select a request that is not closed or cancelled.
5. Click the ‘Actions’ button on the HR case view. The drop-down is expanded and the following values are displayed:
   1. Send Email
   2. Close Onboarding Case
   3. Reassign Supervisor
   4. Reassign HR Representative
   5. Reassign Training Lead

6. Click ‘Send Email’
   1. Click the Quick Messages drop-down on top right
   2. Populate the ‘To’ field and click ‘Send’

7. Click ‘Activity’ tab near middle of page to confirm an entry was added to indicate the email was sent
1. Navigate to the HR Onboarding Portal (https://quspsonboarding.servicenow.services.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’
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 emails) 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
<table>
<thead>
<tr>
<th>Module</th>
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<td>3.</td>
<td>Workflow</td>
<td>15</td>
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<tr>
<td></td>
<td>3.1 Pre-Boarding</td>
<td></td>
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<tr>
<td></td>
<td>3.2 Week 1 Tasks</td>
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<td></td>
<td>3.3 Week 2 Tasks</td>
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<tr>
<td>4.</td>
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<td>8.</td>
<td>Labs/Activities</td>
<td>65</td>
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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

<table>
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<th>FY21</th>
<th>FY22</th>
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<tr>
<td></td>
<td>SEP</td>
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<tr>
<td>Pilot Training (9/7-16)</td>
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<tr>
<td>Pilot (9/17 – 12/31)</td>
<td></td>
</tr>
<tr>
<td>Analyze Results and Feedback</td>
<td></td>
</tr>
</tbody>
</table>
I accepted my offer and 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 1**
There was lots to do this week, Onboarding Forms, Driver Training, and additional Orientation Training, but so far everything is going very smoothly.

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

**WEEK 2**
I’m excited to finally take part in a Shadow Day and On the Job training to learn more about my job.

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

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

**80 DAY**
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**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.

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

- Schedule and maintain training sessions
- Orientation and training of new hires
- Coordinating with HRSSC, HR representatives, and supervisors to track onboarding progress
Module 1

HR Onboarding Portal
Portal – URL and Access

- **Environment URL and Access:**
  - **Onboarding Portal**
    - CAT URL: [https://quspsonboarding.servicenowservices.com/onboarding](https://quspsonboarding.servicenowservices.com/onboarding)
    - PROD URL: [https://uspsonboarding.servicenowservices.com/onboarding](https://uspsonboarding.servicenowservices.com/onboarding)
  - **Training Portal**
    - CAT URL: [https://quspsonboarding.servicenowservices.com/training](https://quspsonboarding.servicenowservices.com/training)
    - PROD URL: [https://uspsonboarding.servicenowservices.com/training](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.
The HR Onboarding “Training Widget” provides a convenient method for Trainers to create, schedule, and mark attendance for orientation and training sessions in bulk.

**Schedule a Training Session:**
- Trainers can use this functionality to schedule/create various training sessions.

**Add Attendees:**
- Trainers can add attendees while they are creating the training as well as at a later time.
The HR Onboarding “Training Widget” provides a convenient method for Trainers to create, schedule, and mark attendance for orientation and training sessions in bulk.

**Edit Session Details:**
- Trainers can change details of the session (e.g., in case of rescheduling a training)

**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

**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
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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.

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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.
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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.
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.
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**Workflow – Week 2 Tasks**

**Mark Attendance for ___ Training:**
This task will allow the Trainer to capture attendance and hours of attendance for the New Hire’s various training(s).

**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

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 any New Hire must be closed manually in the event of a separation from USPS.

Closure Reason:
When closing a case, the user must identify a reason. Provide additional high-level notes if “Other” is selected (example "Duplicate record").
Module 5

Communications
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
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.
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
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
<table>
<thead>
<tr>
<th>Lab/Activity #</th>
<th>Topic Covered</th>
<th>Est. Time (min)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Portal (Homepage widgets, My Requests Page, My To-Dos Page, My Team Page, Helpful Links)</td>
<td>10</td>
</tr>
<tr>
<td>2.</td>
<td>Training Widget (Scheduling training, updating training sessions, bulk updates for attendance)</td>
<td>10</td>
</tr>
<tr>
<td>3.</td>
<td>Dashboard (Navigating to Dashboard, Dashboard tabs, Dashboard filters)</td>
<td>5</td>
</tr>
<tr>
<td>4.</td>
<td>Reporting (Running/Creating ad-hoc reports)</td>
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</tr>
<tr>
<td>5.</td>
<td>Pre-Boarding Tasks (Scheduling Training)</td>
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<td>6.</td>
<td>Week 1 Tasks (Training Attendance)</td>
<td>10</td>
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<td>7.</td>
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<td>10</td>
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<td>8.</td>
<td>Closing a ServiceNow HR Onboarding cases</td>
<td>5</td>
</tr>
<tr>
<td>9.</td>
<td>Communications (Creating quick messages &amp; using them from Actions UI)</td>
<td>10</td>
</tr>
<tr>
<td>10.</td>
<td>Reassignment</td>
<td>5</td>
</tr>
<tr>
<td>11.</td>
<td>Submitting a Support Request</td>
<td>5</td>
</tr>
</tbody>
</table>
1. **Navigate to the HR Onboarding Portal** ([https://quspsonboarding.servicenowservices.com/onboarding](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
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
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”
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.
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.
1. Navigate to the HR Onboarding Portal (https://guspsgonboarding.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.


5. Select ‘Assigned to Me’ under the drop-down in the center of the page. No tasks should be displayed.
1. Navigate to the HR Onboarding Portal (https://guspsonorboarding.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.
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.
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
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
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   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
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’
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
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Document purpose and overview:

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<td>Schedule a Training Session in Bulk</td>
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<td>Onboarding Activities &amp; Activity Sets</td>
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</tbody>
</table>
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

1. Go to [https://uspsonboarding.servicenow.services.com/onboarding](https://uspsonboarding.servicenow.services.com/onboarding) to login for Supervisors and HR. [https://uspsonboarding.servicenow.services.com/training](https://uspsonboarding.servicenow.services.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.
Reassign a New Hire Case

**Navigation:** Home > New Hire Case

How to reassign a New Hire Case.

Supervisors, HR and Trainers can reassign a new hire’s record to another person in their same role.

**Important Step**

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.

**Visual Aid**

**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>
<thead>
<tr>
<th>Important Step</th>
<th>Visual Aid</th>
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<tbody>
<tr>
<td>1. Go to <a href="https://uspsonboarding.servicenow.com/onboarding">https://uspsonboarding.servicenow.com/onboarding</a> to login.</td>
<td>![Visual Aid Image]</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>![Visual Aid Image]</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>![Visual Aid Image]</td>
</tr>
</tbody>
</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.

<table>
<thead>
<tr>
<th>Important Step</th>
<th>Visual Aid</th>
</tr>
</thead>
</table>
| 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. | **Training Sessions**
ARC Academy 123  
23d ago • 03033-BROOKLINE-1356020
TGest  
about a month ago • 03033-BROOKLINE-1356020
City Carrier Academy  
7d ago • 03034-CANDIA-1355848
Test Welcome to USPS [Jim Fitzsimmons]  
8d ago • 03031-AMHERST-1352973
Sales and Services Associate Training (07/24/2021)  
13d ago • 03031-AMHERST-1352973
First 5 of 32 View all |

2. Enter the Training Details and click “Submit”. The Attendees step loads next. | **Schedule a Training Session**
New Training Session

- **Data/Time:**
- **Location:**
- **Training Type:**
- **Training Facilitator:**
- **Course Title:**

Submit Add attachments
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>
<thead>
<tr>
<th>Important Step</th>
<th>Visual Aid</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>1.</strong> (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. <strong>Note:</strong> 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 <strong>Pre-Boarding</strong> activity set.</td>
<td></td>
</tr>
<tr>
<td><strong>2.</strong> Click on the dropdown to “Choose Existing [training title] Session” Where [training title] is the name of the training session.</td>
<td></td>
</tr>
</tbody>
</table>
| **3.** Click the Submit button. The new hire should be assigned to the training session. | ![Visual Aid](image1.png) ![Visual Aid](image2.png)
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.

---

**Important Step**

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.

2. Enter the attendance for each new hire: number of hours attended, status and notes.

3. Click “Log Attendance and Close Training” button. Each New Hire Case will be updated with the attendance details set.

---

**Visual Aid**

**Training Sessions**

<table>
<thead>
<tr>
<th>Training Session</th>
<th>Date of Event</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>ARC Academy 123</td>
<td>23d ago</td>
<td>03033-BROOKLINE-1356020</td>
</tr>
<tr>
<td>TGest</td>
<td>about a month ago</td>
<td>03033-BROOKLINE-1356020</td>
</tr>
<tr>
<td>City Carrier Academy</td>
<td>7d ago</td>
<td>03034-CANDIA-1356848</td>
</tr>
<tr>
<td>Test Welcome to USPS [Jim Fitzsimmons]</td>
<td>8d ago</td>
<td>03031-AMHERST-1352973</td>
</tr>
<tr>
<td>Sales and Services Associate Training (07/24/2021)</td>
<td>13d ago</td>
<td>03031-AMHERST-1352973</td>
</tr>
</tbody>
</table>

First 5 of 32  View all
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.

<table>
<thead>
<tr>
<th>Important Step</th>
<th>Visual Aid</th>
</tr>
</thead>
</table>
| 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. | ![Visual Aid](image) |
| 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.). **DO NOT ENTER ANY MEDICAL INFORMATION.**  
   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**

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.

(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**

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.
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>
<thead>
<tr>
<th>Important Step</th>
<th>Visual Aid</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. (When logged in and with the New Hire Case open). Select the <strong>Actions</strong> 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><img src="https://example.com/visual-aid.png" alt="Visual Aid Image" /></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><img src="https://example.com/visual-aid.png" alt="Visual Aid Image" /></td>
</tr>
</tbody>
</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.

<table>
<thead>
<tr>
<th>Important Step</th>
<th>Visual Aid</th>
</tr>
</thead>
<tbody>
<tr>
<td>2. (When logged in). Select “Support Requests” navigation dropdown then select “Submit a Support Request”</td>
<td><img src="image_url" alt="Visual Aid" /></td>
</tr>
<tr>
<td>3. Fill out the HR Portal IT Support Request form with the following details:</td>
<td></td>
</tr>
<tr>
<td>• Your district</td>
<td></td>
</tr>
<tr>
<td>• Your role (or the role needing support)</td>
<td></td>
</tr>
<tr>
<td>• The user this request is being opened for (yourself or another user)</td>
<td></td>
</tr>
<tr>
<td>• A short one sentence description</td>
<td></td>
</tr>
<tr>
<td>• A longer description of the issue/question with more detail.</td>
<td></td>
</tr>
</tbody>
</table>

**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.

### Important Step

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.

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
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.

<table>
<thead>
<tr>
<th>Important Step</th>
<th>Visual Aid</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. (When logged in and with the New Hire Case open). Click the Actions dropdown menu. Then select “Send Email”.</td>
<td><img src="image1.png" alt="Actions dropdown" /></td>
</tr>
<tr>
<td>2. Fill out the Compose Email form. You can use the “Quick Messages” dropdown in the top-right to select a template message.</td>
<td><img src="image2.png" alt="Compose Email" /></td>
</tr>
</tbody>
</table>
**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>
<thead>
<tr>
<th>Important Step</th>
<th>Visual Aid</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. (When logged in and with the New Hire Case open). Click the Activity tab.</td>
<td><img src="image" alt="Visual Aid Image" /></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><img src="image" alt="Visual Aid Image" /></td>
</tr>
</tbody>
</table>
# Onboarding Activities & Activity Sets

**Activity Sets**

These are groups of activities that are either performed by the system or the user throughout their onboarding process. Below is a key identifying the types of activities.

- 🔴 Automated activity performed by the HR Onboarding Pilot system
- 🔺 Manual activity performed by the user
- 🚨 Notification email sent by the HR Onboarding Pilot system
- ➤ Activity performed outside the system (included for reference - not all external activities shown)

## Pre-Boarding Activity Set

Below are activities in this activity set for each type of user in the HR Onboarding Pilot.

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

- 🔴 Automated
- 🔺 Manual
- 🚨 Notification
- ➤ External

---

**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.**
Day 1 (of Orientation) Activity Set
Below are activities in this activity set for each type of user in the HR Onboarding Pilot.

<table>
<thead>
<tr>
<th>New Hire (all)</th>
<th>HR</th>
<th>Supervisors</th>
<th>Trainers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Report to Welcome to the USPS Orientation</td>
<td>HR is sent an email notification if the New Hire does not report to Welcome to USPS Orientation</td>
<td>Supervisor is sent an email notification if the New Hire does not report to Welcome to USPS Orientation</td>
<td>Trainer reports Welcome to the USPS Orientation Day 1 “No Shows”</td>
</tr>
<tr>
<td>Begin Welcome to the USPS Orientation</td>
<td>If New Hire does not report for Orientation, HR may Notify HRSSC to remove New Hire from Rolls</td>
<td>Coordinate with Trainer to schedule Shadow Day with New Hire, where applicable.</td>
<td>Capture Welcome to the USPS attendance and time</td>
</tr>
</tbody>
</table>

- 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.

<table>
<thead>
<tr>
<th>New Hire (all)</th>
<th>HR</th>
<th>Supervisors</th>
<th>Trainers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Complete and Sign Onboarding forms</td>
<td>File Onboarding Forms from PEDC Trainer</td>
<td>Enter New Hire’s time into the Time &amp; Attendance Collection System (TACS)</td>
<td>Trainer facilitates New Hire training</td>
</tr>
<tr>
<td>Get ID Badge Picture taken</td>
<td>Notify HRSSC Onboarding forms are available for upload to eOPF</td>
<td>Prepare for New Hire's First Day in the Unit/Duty Station (checklist)</td>
<td>Trainer assists New Hire with completion of onboarding forms</td>
</tr>
<tr>
<td>Complete and Sign Oath of Office form</td>
<td></td>
<td>Welcome New Hire to Unit/Duty Station (checklist)</td>
<td>Trainer takes ID Badge Photo</td>
</tr>
<tr>
<td>Complete Driver Training (if applicable)</td>
<td></td>
<td>Prepare for Shadow Day with New Hire (checklist), where applicable.</td>
<td>Capture attendance and time (daily) for required training</td>
</tr>
<tr>
<td>New Hire is sent an email regarding day 1 at Unit</td>
<td></td>
<td>Schedule Initial Probationary Review meeting with New Hire</td>
<td>Trainer sends New Hire Timecard to Unit Supervisor</td>
</tr>
<tr>
<td>Report to Unit/Duty station (PSE/MHA)</td>
<td></td>
<td></td>
<td>Trainer updates Training in HERO to identify which training courses have been completed</td>
</tr>
<tr>
<td>Participate in Shadow Day (if applicable)</td>
<td></td>
<td></td>
<td>Trainer mails completed hard copy Onboarding Forms to HR</td>
</tr>
</tbody>
</table>

**Symbols:**
- 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.

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

- 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.

<table>
<thead>
<tr>
<th>New Hire (non-RCA/ARC)</th>
<th>HR</th>
<th>Supervisors</th>
<th>Trainers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Participate in 30-Day Review</td>
<td>HR is sent an email notification if the New Hire is not recommended for retention following their review</td>
<td>Enter ratings and generate 30-Day review form (PS Form 1750)</td>
<td>No Activities</td>
</tr>
<tr>
<td>Acknowledge 30-Day Review</td>
<td>If New Hire is not recommended for retention, remove from rolls per Supervisor recommendation</td>
<td>Conduct 30-Day Review w/ New Hire</td>
<td></td>
</tr>
<tr>
<td>Complete additional training (if required)</td>
<td>HRSSC is sent an email notification if the New Hire’s case is closed in Service Now</td>
<td>Acknowledge review was held and indicate whether employee signed</td>
<td></td>
</tr>
<tr>
<td>New Hire receives Written Notification if released</td>
<td></td>
<td>File hardcopy form until next review</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Supervisor sent an email reminder to schedule the 60-Day Review</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Schedule 60-Day Review w/ New Hire</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Close case due to separation if New Hire is not recommended for retention</td>
<td></td>
</tr>
</tbody>
</table>

- 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.

<table>
<thead>
<tr>
<th>New Hire (non-RCA/ARC)</th>
<th>HR</th>
<th>Supervisors</th>
<th>Trainers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Participate in 60-Day Review</td>
<td>HR is sent an email notification if the New Hire is not recommended for retention following their review</td>
<td>Enter ratings and generate 60-Day review form (PS Form 1750)</td>
<td>No Activities</td>
</tr>
<tr>
<td>Acknowledge 60-Day Review</td>
<td>If New Hire is not recommended for retention, remove from rolls per Supervisor recommendation</td>
<td>Conduct 60-Day Review w/ New Hire</td>
<td></td>
</tr>
<tr>
<td>Complete additional training (if required)</td>
<td>HRSSC is sent an email notification if the New Hire’s case is closed in Service Now</td>
<td>Acknowledge review was held and indicate whether employee signed</td>
<td></td>
</tr>
<tr>
<td>New Hire receives Written Notification if released</td>
<td></td>
<td>File hardcopy form until next review</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Supervisor sent an email reminder to schedule the 80-Day Review</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Schedule 80-Day Review w/ New Hire</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Close case due to separation if New Hire is not recommended for retention</td>
<td></td>
</tr>
</tbody>
</table>

### Notes
- **Automated**: Process initiated automatically.
- **Manual**: Process initiated by user.
- **Notification**: Communication sent via email.
- **External**: Communication sent to external parties.
### 80-Day Activity Set

Below are activities in this activity set for each type of user in the HR Onboarding Pilot.

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

- Automated
- Manual
- Notification
- External