OPM | USA Staffing

USA Staffing®

Implementation Guide

November 2024

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Introduction

We are pleased your agency has selected USA Staffing as its federal talent acquisition system. Successful implementation of any recruitment tool requires planning, communication, and change management. To help your agency transition to USA Staffing, we have created this Implementation Guide for your use. It provides recommendations and best practices from over 50 years of Office of Personnel Management (OPM) experience helping agencies automate their staffing processes. It is designed to help you communicate the benefits of the system to key stakeholders, build awareness of the transition project, develop, and implement change management strategies and design agency specific configurations. While we strongly suggest your agency incorporate the full range of recommendations outlined in this guide, we recognize you have unique agency challenges and opportunities that will define your implementation strategy. Your USA Staffing Account Manager is your primary OPM point of contact for any questions you have about implementation and will work with you to help determine the best strategies for transitioning your organization.

Step 1: Prepare your Team

Criteria for Success

Before you begin, we recommend you define what a successful USA Staffing implementation means to your agency. **Criteria that other agencies have used to define their success include**:

- Widespread adoption and use of the system by key stakeholders including HR users and Hiring Officials
- Reducing the time from the announcement closing to issuing certificates
- Reducing the number of re-announcements due to poor quality applicants
- Increasing the number of highly qualified candidates
- Increasing the number of selections made by Hiring Officials
- Increasing the number of vacancies each HR user can concurrenlty process
- Reducing the number of applicant questions
- Completion of the online USA Staffing training modules
- Building a comprehensive library of valid assessments & announenments including competencies, items, eligibilities, & PDs
- Creating standard operating procedures (SOPs) for using the system

Roles and Responsibilities

Every agency will have a unique implementation approach for USA Staffing. Therefore, your Account Manager will help guide you through this transition and provide guidance and assistance throughout the life of your USA Staffing partnership. Your Account Manager has reach-back capability to other groups within OPM including HR Specialists, Business Analysts, IT Professionals, and Personnel Research Psychologists (also called I/O Psychologists) who can help provide holistic implementation recommendations and services.

Role	Responsibilities
USA Staffing Account Manager	✓ Provide USA Staffing subject matter expert (SME) knowledge ✓ Suggest business process improvements to ensure best possible system use ✓ Provide change management and implementation support ✓ Provide a sample project plan, risk register, and Responsible, Accountable, Consulted, Informed (RACI) framework ✓ Provide you with the latest information on schedule, functionality, and availability of resource materials for the USA Staffing system ✓ Act as a liaison between your team and the Development and User Support teams within the USA Staffing Program Office, as well as other OPM programs ✓ Communicate and discuss system changes and new features & their impact to your organization ✓ Document and communicate user needs and pain points to the USA Staffing Program Office ✓ Coordinate the Interagency Agreement Process and any other financial processes between OPM and your agency related to the USA Staffing system
Agency	✓ Identify a person to serve as the implementation lead/project manager ✓ Identify the Implementation Team for your agency ✓ Engage all your internal stakeholders (e.g., HR users, hiring managers, executives, unions and internal applicants) to determine the best way to transition from your current system to USA Staffing ✓ Use USA Staffing-provided materials to develop and communicate about the implementation with stakeholders ✓ Identify, create, and test content and configurations desired for all USA Staffing environments ✓ Inform your Account Manager of your intended implementation schedule ✓ Document agency processes and provide a copy to your Account Manager for awareness ✓ Develop a training plan for end users ✓ Schedule training in coordination with your Account Manager

Designate a USA Staffing Implementation Team and Timeline

We have found USA Staffing implementation is most successful when there is strong support from agency leadership. This includes dedicating the necessary program resources to successfully manage the agency's use of USA Staffing.

Implementation Lead/Project Manager (PM)

As mentioned earlier, we recommend identifying an implementation lead/project manager to serve as your agency's primary point of contact (POC) for USA Staffing. This POC will meet regularly with the USA Staffing Account Manager. Having dedicated POCs allows both organizations to communicate in a structured and effective manner. We recommend the individual in this role have HR staffing experience.

The time commitment for your implementation lead will depend on numerous factors including your timeline for implementing USA Staffing, the number of new users, your USA Staffing implementation project plan, the size of your Implementation Team, and your unique business needs. Based on our experiences with current customers, primary POCs generally dedicate between 25% and 100% of their time to this role during the implementation phase and 10% to 25% of their time once the agency has fully implemented USA Staffing. Depending on your agency's size and needs, the primary POC may need to dedicate 100% of their time to this role after implementation is complete. Examples of responsibilities for the PM include:

- Collaborate closely with your agency's change management lead
    - The PM is responsible for partnering with the change manager (described as a role in the Implementation Team below) to identify and address the cultural and operational shifts required for successful implementation of the new staffing system. This involves sharing insights on the organization's existing culture, facilitating stakeholder discussions, and ensuring that change initiatives are aligned with employee needs. By working together, the POC and change manager can develop strategies that promote acceptance and minimize resistance, ultimately fostering a smooth transition and enhancing organizational buy-in.
- Communicate information and progress of the Implementation Team to key stakeholders
    - The PM serves as the primary liaison between the Implementation Team and all stakeholders within the agency. This involves regularly updating stakeholders on project milestones, timelines, and overall progress. Effective communication ensures that everyone is informed and aligned with the agency's staffing goals.

- Relay comments and concerns from agency users
  - Gathering and synthesizing feedback from agency users is critical. The PM must actively engage with users to understand their experiences, concerns, and suggestions regarding the new staffing system. This two-way communication builds trust and encourages collaboration, allowing users to feel valued and involved in the change process. The PM should also facilitate discussions to address these concerns, ensuring they are relayed promptly to the Implementation Team.
- Communicate specific business practices and agency hiring information to aid in tailoring the implementation to your specific needs
  - The PM must clearly articulate the unique business practices and hiring processes of the agency to tailor the implementation of the new system effectively. This includes sharing insights into current workflows, identifying areas for improvement, and providing detailed documentation that aligns the system capabilities with the agency's needs. This collaborative approach helps to create a customized solution that enhances efficiency and user satisfaction.
- Manage the USA Staffing Implementation Project Plan and Risk Register
  - The PM is responsible for overseeing the implementation project plan, which includes setting deadlines, assigning tasks, and tracking progress against established benchmarks. Additionally, managing the risk register is crucial to identify potential obstacles early on. The PM should foster a collaborative environment where team members feel empowered to share concerns about risks and suggest mitigation strategies, ensuring a proactive approach to project management.
- Coordinate agency participation in customer workgroups
  - The PM plays a vital role in organizing and facilitating agency participation in relevant workgroups. This involves identifying key representatives from various departments, scheduling meetings, and ensuring that the right voices are heard in discussions. Effective coordination fosters a collaborative approach and allows for diverse perspectives, ultimately leading to more informed decisions that reflect the needs of the entire agency.
- Oversee the creation and testing of system configurations
  - The PM must ensure that the development of system configurations aligns with the defined requirements and agency practices. This includes overseeing testing phases to validate that configurations work as intended and meet user expectations. Collaboration with technical teams and end-users during testing is crucial, as it enables the identification of any issues early in the process and encourages a culture of continuous improvement.

The Implementation Team

We recommend establishing an Implementation Team with the responsibility to create a USA Staffing implementation plan with associated milestones, timelines, resources, and costs. The unique strategy and approach your agency will take is dependent upon numerous factors, such as the amount and type of staffing workload your agency processes; the size of your HR staff; and the assessment methodology your agency uses. Examples of roles/tasks for the Implementation Team include:

Executive Sponsor

The Executive Sponsor authorizes the change initiative, actively participates throughout the project, and builds a coalition of support among peers and managers to gain buy-in.

Change Management Lead

The Change Management Lead applies a structured approach to change, enables and equips other team members, and collaborates with the Project Manager to ensure alignment of change strategies with agency goals.

Communication Liaison

The Communications Liaison develops and implements a communication strategy to keep stakeholders informed and engaged, working closely with the Change Management Lead and Training Coordinator to keep consistent messaging throughout the implementation process.

IT Liaison for Interconnections and Browser Configurations

The IT Liaison ensures the agency's IT and browser configurations meet USA Staffing requirements and communicates any concerns. Can serve as the in between for USA Staffing technical system set-up questions.

Classification Lead

The Classification Lead guides the agency's process around Classification including developing standard operating procedures and transitioning existing position descriptions (PDs) to USA Staffing.

Onboarding Lead

The Onboarding Lead guides the agency's process around New Hires including identifying gaps in the current Onboarding process and coordinating with other parts of HR partners like Benefits, Payroll, Security, etc.

Program Analyst/Reporting Lead

The Program Analyst/Reporting Lead analyzes information to ensure that agency needs are effectively communicated and met, including providing data for reporting purposes, assessing the effectiveness of current hiring processes, and determining how data from USA Staffing will be integrated into the agency's reporting strategy.

Training Coordinator

The Training Coordinator utilizes USA Staffing resources to develop agency-specific training materials and ensures a comprehensive training plan for new and existing users, including managing prerequisites for system access, coordinating online training modules, facilitating best practices assessment classes, and communicating agency naming conventions.

Office Administrator(s)

Office Administrators create Standard Operating Procedures (SOPs) and agency-specific policies for implementing and utilizing USA Staffing, leveraging their high proficiency in federal staffing, examining, and agency-specific business practices, along with strong oral and written communication skills.

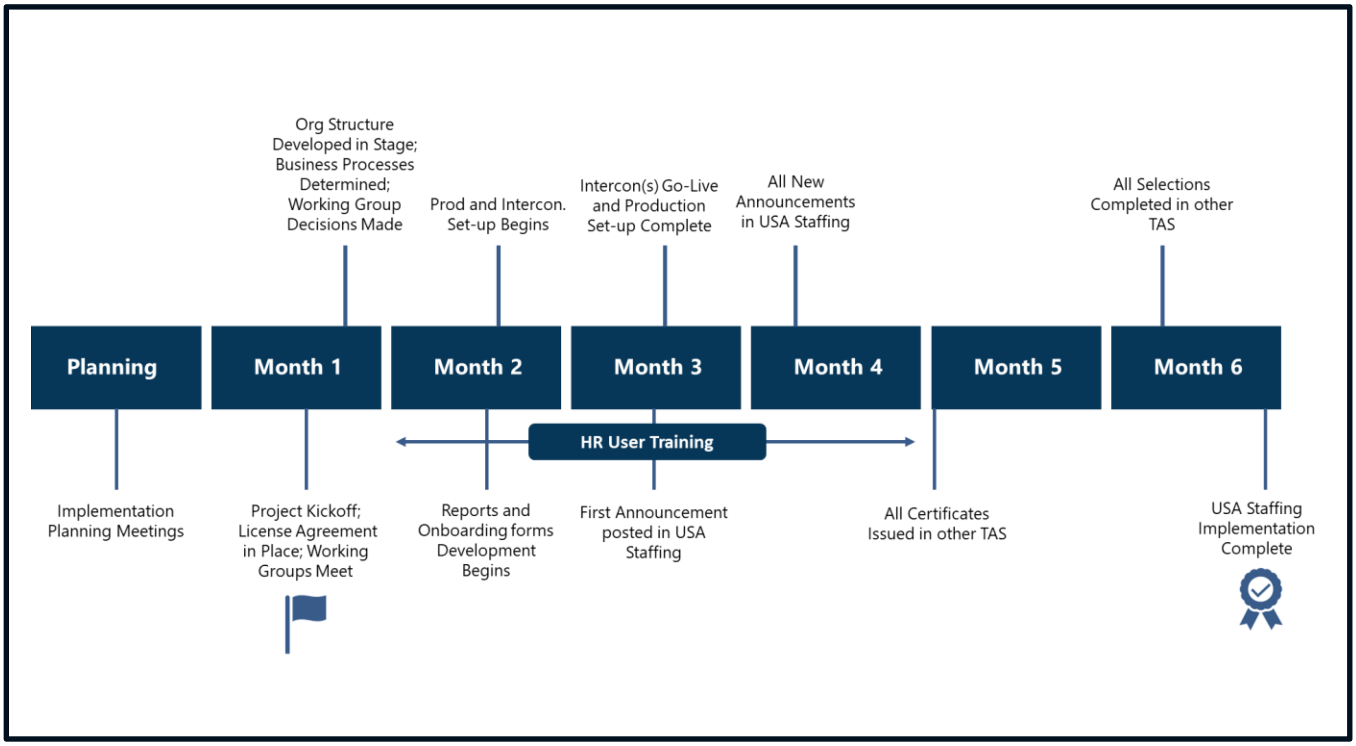
Super Users

Super Users are tech-savvy individuals with expertise in Federal staffing who serve as Subject Matter Experts (SMEs) for USA Staffing, supporting their office by answering basic questions, consolidating system needs requests, ensuring users complete online training, identifying coaching topics, training new staff, and liaising with their agency's USA Staffing Advisory Board members.

TIP: USA Staffing was created by OPM to help automate the hiring process and offers several flexibilities that allow HR Specialists to issue certificates for delegated examining, merit promotion, and all non-competitive Federal hiring authorities. Because of this, to fully understand how the USA Staffing system works and the purpose of the various options in the system, we recommend ensuring your HR Specialists are highly proficient in Federal staffing rules and regulations prior to using USA Staffing. Employees should have completed prerequisite courses and have on-the-job experience in Basic Staffing and Placement, as well as other relevant HR courses or training prior to using USA Staffing. Examples of these include: Delegated Examining Certification/Recertification, Merit Promotion Hiring, Category Rating, Qualifications Analysis, Adjudicating Veterans' Preference, Job Analysis and Assessment Development. It is also helpful if your employees are comfortable navigating the Internet and using Web-based applications to complete their work.

Timeline

All agencies are responsible for determining their own implementation timeline. Implementation teams should closely consult with their Account Manager on their implementation timelines and plans. Shown below is a sample timeline.



Step 2: Prepare your Organization

Communication is one of the most essential elements to a successful transition to USA Staffing. As with any major change, employees may be reluctant to adopt new technology or change familiar business practices. Collaboration of the executive leadership team, HR Specialists, Hiring Officials, internal applicants, union representatives, and others specific to your agency will help build awareness of the transition project, meet legal requirements, secure the buy-in of system users and customers, and support implementation goals.

Identify Stakeholders

We recommend agencies complete a stakeholder analysis (Appendix A – Stakeholder Analysis) as one of the first steps for developing a communication plan. A stakeholder analysis is a technique of systematically gathering and analyzing information to determine whose interests should be considered throughout the USA Staffing implementation project. It is critical for project success to identify those people early in the project and to analyze their levels of interest, expectations, importance, and influence.

Determine What/How to Communicate with Each Stakeholder Group

The communication plan should identify the needs of your stakeholders and identify who needs what information, when they will need it, how it will be given to them, and by whom it will be given. Communication activities can take many shapes and forms. We recommend looking for types of communication that can cover more than one stakeholder's needs.

Key stakeholders may include but are not limited to:

- Senior Leadership
- Unions
- HR Users
- Hiring Officials
- Applicants
- Selectees
- Onboarding Partners

Examples of communications designed to build buy-in and enthusiasm for the project could include:

- Meeting 1-on-1 with key stakeholders (e.g., users, leadership, union officials) on an ongoing basis
- Traveling to various field locations and departments to explain benefits of USA Staffing (e.g., town hall meetings)
- Providing testimonials from individuals who have used USA Staffing
- Planning celebrations to bring visibility to the completion of major milestones

- Publicizing accomplishments across the agency
- Providing USA Staffing implementation status reports for leadership
- Conducting ongoing meetings (in person, conference calls, videoconferences) with the Implementation Team
- Providing ongoing metrics (e.g., number of announcements posted, number of certificates created, number of selections made)

It is essential to include your Account Manager in your communication plan. Your Account Manager can assist with sample communications.

Highlight Benefits

In developing your communications strategy or plan, we recommend focusing key messages on the benefits of the change specific to each stakeholder group at your agency. An effective communications strategy provides transparency and a shared vision for the various audiences.

Example Benefits to Using USA Staffing
✓ Increased timeliness and efficiency in filling positions ✓ Larger pool of well-qualified applicants ✓ Positive first impression about the agency to the applicants ✓ Better tracking of the hiring process ✓ Elimination of paper case files ✓ Accurate application of hiring authorities and veterans' preference ✓ Real-time electronic status updates to applicants ✓ Ability to combine Delegated Examining and Merit Promotion announcements ✓ Ability to reuse announcement and assessment templates ✓ Reduction/elimination of paper applications ✓ Ability for the Hiring Official to view applicant materials and make selections electronically ✓ Ability to collaborate with Hiring Officials through reviews and notes ✓ Ability to classify positions directly from the tool and have PD information flow into the Request

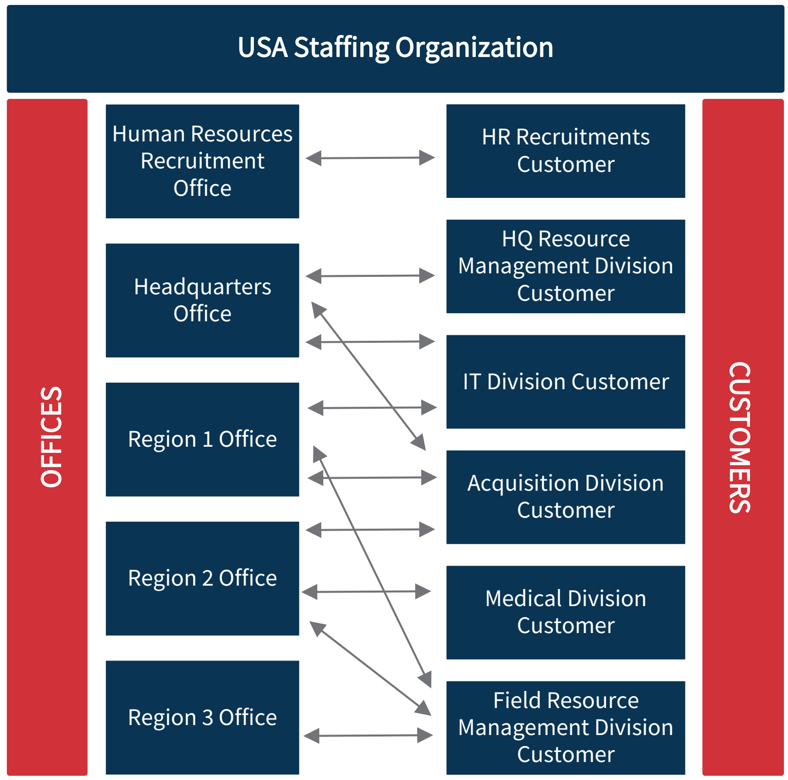
Step 3: Review Functionality and Configure your System Settings

One of the most important steps to implementation is setting up your Organization/Office/ Customer designation. An **office** is a group of HR users working together, sharing authority to perform work, and possibly having the same job function. Typically, the office mirrors physical or organization locations of the HR users. A **customer** is a group of Hiring Manager users with the potential to share assignments. Offices can be organized by location or hiring functions.

Keep in mind some common rules when considering the ideal office structure:

- If an HR user should be able to view another HR user's staffing work, then the HR users should be assigned to the same office(s). Users can be assigned to multiple offices.
- If the HR user should not be able to view another's work, the HR users should be assigned to different offices. Vacancies cannot be moved or shared across offices.

For additional information on configuring your office set-up, reach out to your Account Manager.



Office and Customer Requests

Completing the New Office and New Customer Requests is one of the first steps in setting up your access to USA Staffing. These documents allow the USA Staffing team to create the live and test office(s) and customer(s) for your organization. Please visit the [USA Staffing Resource Center]() to download the New Office and New Customer Requests.

After the New Office and New Customer Requests are completed, OPM will create your office(s) and customer(s), and one **Office Administrator** account. The Administrator is typically responsible for creating all the licensed user accounts for your organization and assigning permission profiles to each one after their online training has been completed. The Administrator has broad access to USA Staffing. They manage templates and other functions that will affect an entire office. Your agency may create and assign as many Office Administrators as necessary for you to effectively address your workload. The number of Administrators you assign will be dependent on your internal business practices. The Administrator(s) will learn more about their role when they complete the online training. The Account Manager is also available to assist the Administrator(s) as needed.

Create Business Process Rules and/or Standard Operating Procedures

USA Staffing operates on a single platform, meaning all USA Staffing customer agencies have access to all the system's features. This flexibility ensures your agency can use USA Staffing to complete a broad range of hiring actions. Depending on the needs of your agency, some system features may not be necessary for your users to complete their work. In addition, not all your users need access to modify information stored in the system. Your Account Manager can help you determine which USA Staffing features best meet your needs and how to best configure the system to meet your needs.

If your agency currently has documented Business Process Rules and/or SOPs in place for your classification and staffing processes, these procedures will likely require some modification when implementing a new talent acquisition system.

We strongly recommend reviewing and updating your Business Process Rules and/or SOP's and ensuring the following topics are addressed:

User Permission Profiles

It is important to determine how your agency will control access to various parts of the system. USA Staffing permission profiles reside at the individual user level and your agency is responsible for determining the permission profile for each user. We strongly recommend creating Business Process Rules and/or an SOP to determine what level of permission each user will have when accessing USA Staffing.

USA Staffing offers many flexibilities for user accounts and permission profile management. The system contains default system level permission profiles; however, agencies can create their own custom permission profiles. User profiles are divided into two types of permissions: Paid and Unpaid.

Human Resource Users (HR Users) who complete tasks focused around creating and editing of 6 core functions within USA Staffing: Vacancies, Announcements, Assessments, Qualifications Review and Adjudication, Certificates and Reviews will require a paid permission.

There are 4 user types in USA Staffing:

1. **Human Resources (HR) Users:** Users with this user type are granted access at the office level to classify positions, create hiring requests, make announcements, develop assessment packages, evaluate candidates, issue certificates, onboard new hires, and run reports. System level permission profiles included in this type are:
   - Office Administrator
   - Standard HR User

- HR Assistant
- HR View Only
- Onboarding Only User*
  **This permission allows Onboarding users to be granted access at the office level, rather than the customer level.*

2. **Hiring Manager (HM) Users:** Create hiring requests or review hiring information such as recruitment actions, job analysis, assessments, announcements, and certificates to make selection decisions. System level permission profiles include this type are:
   - Standard Hiring Manager User
   - Hiring Manager Assistant
   - Hiring Manager View Only
3. **Onboarding Users:** Will have access to new hire requests and records for their assigned Customers. System level permission profiles included in this type are:
   - Standard Onboarding User
   - Onboarding View Only
4. **Reports Only and Applicant Flow Data Users:** Access only granted to the reporting tool; do not need permission profiles because they do not have access to core USA Staffing.

For a full list of available permissions please visit the [USA Staffing Resource Center].

Reviews

Reviews are HR's mechanism for connecting and sharing information with hiring managers or other SMEs who need to provide feedback on work HR is performing in USA Staffing, like classification, assessments, announcements, panels, structured resume review, and certificates. Reviews use can vary by agency and can be utilized to best fit the needs of your HR office and agency's business processes. Reviews are a great way to share information to increase and document collaboration between the Hiring Manager and the HR Office. Utilize the resources available on the Resource Center to create an SOP that makes the most sense for your office/organization.

Requests

Requests begin the staffing process within the USA Staffing system, equivalent to an SF-39 or an SF-52 (Please note: a SF-39 and SF-52 is not generated in USA Staffing). Vacancies are created based on the request information entered and a vacancy number is then assigned.

The request and all associated information (examples are linked requests, assessment packages, announcements, applicants, certificates, and notifications) are retained in USA Staffing based on records retention policies and/or guidelines. Request numbers can be system generated, transmitted from an interconnected request processing system or manually entered based on agency specific protocol.

Classification

USA Staffing has classification functionality that allows HR users to classify positions using a variety of classification systems and formats. We understand that many Classifiers are Specialists and do not need access to recruitment tools, therefore permissioned HR users can take advantage of this functionality with a non-paid license. Classifiers can leverage the “Reviews” feature to electronically collaborate with Hiring Managers during the classification process.

Classifiers can publish final position descriptions (PDs) in USA Staffing. PDs are published in an electronic library that can be pulled into your recruitment request. The PD library allows for inactive PDs to be retired. Hiring Managers have direct access to published PDs, based on their access, in the Hiring Manager Interface. Agencies will need to decide to what capacity they will utilize the Classification feature.

Hiring Policies

Review your agency’s merit promotion and category rating policies and associated procedures. Are there parts of the policy or procedures that can be modified because of USA Staffing features adopted by your agency? In some cases, the policy itself may need to be updated to reflect the current operating environment and to remove outdated requirements that inhibit the potential success for automating the hiring process. Decisions made at the beginning can affect reporting implications in the end, so it is important to evaluate this section from many perspectives within the organization.

Because of the range in customer needs and flexibilities in the USA Staffing system, there may be times where the system allows for functionality, but your business process does not. Examples may include the processing of late applications or HR staff modifying Announcement or Assessment questionnaires.

Eligibilities

USA Staffing allows specialists to easily include questions to assess applicants’ eligibilities. Eligibilities are defined as the questions that address the standard and/or custom hiring eligibilities applicants are considered for during the referral process. By enabling eligibilities when creating a vacancy, the system will automatically place a corresponding question into the application. Applicants view the eligibility questions as Yes/No questions in the online application and the HR Specialist will then be able to adjudicate and/or pull ranking lists based on them.

Your Account Manager can provide sample eligibility language, if needed.

Creating Standardized Announcement Templates

One way USA Staffing promotes consistency and efficiency is through the use of shared, reusable announcement templates. We recommend developing an SOP on the process your agency will use to create and use the announcement templates.

USA Staffing has tools such as data inserts, placeholder text, announcement number formatting, etc. to assist agencies in building standardized announcement templates. The USA Staffing Program Office has created sample announcement templates for your agency to use and modify that are accessible on the USA Staffing Resource Center.

Assessment Package Options

Another way USA Staffing promotes consistency and efficiency is through the use of shared, reusable assessment package templates, competency network library, manual assessments, multiple hurdles, etc. Competency Networks are the collection of job analysis and assessment data for a position or group of positions. Because they can be organized in multiple ways (i.e. by PD, by series etc.) we recommend developing an SOP on the process your agency will use. Some agencies prefer to have a central library of assessments created by an assessment team rather than having assessments created by individual HR users to manage the quality of what is available to re-use for future announcements. Please refer to Appendix C and the Advisory Board Resource Center for additional information around Assessments.

Reviewing Applicants and Creating Referral Lists

USA Staffing makes the evaluation of candidates more manageable for agency HR staff, as it automatically rates and ranks candidates based on their respective scores on the assessment questionnaires and/or other assessment tools. Through USA Staffing, HR Specialists will find it easier to handle large applicant pools while still maintaining strict compliance with all regulatory requirements.

USA Staffing is fully integrated with USAJOBS therefore applicants apply through their USAJOBS account. Through USAJOBS they also receive status updates and can maintain all their documents.

Notifications

Notification templates can be used to streamline and maintain consistent language for all applicant or new hire correspondence. Hiring Reform encourages HR to send applicant notifications at four phases of the hiring process:

- Application (Acknowledgement letter)
- Rating (Notice of Results)

- Referred/Not referred (Notification letter)
- Selected/Not selected (Disposition letter)

Applicant notifications created in USA Staffing are sent electronically to the applicants' email address. These notifications are also linked to the applicant's USAJOBS account. Notification templates are created at the office level but can be tagged so it's available to the entire Organization. Sample language can be found on the USA Staffing Advisory Board Resource Center.

Onboarding

Onboarding functionality is a part of USA Staffing capabilities. Automating the onboarding process allows selectees to fill out an "ask once use many" style questionnaire instead of spending their first day buried under paper. It provides a streamlined process and includes flexibilities to accommodate unique office needs. Many agencies find incredible time saving capabilities having this engagement so early in the process.

The system can also communicate with eOPF and we provide a certification guide in order to set up the necessary steps with Enterprise Human Resource Integration (EHRI) guidelines. You will also want to identify requirements and forms that your new hires will need as part of the onboarding process. There are numerous standard government wide forms (including state tax forms) that have already been created and can be populated quickly. Those that are agency specific will need to go through a process of automating which your Account Manager will help you with. More information on Onboarding Implementation can be found in the Onboarding Implementation Guide located on the USA Staffing Advisory Board Resource Center.

Reporting

We know reporting is essential to federal HR today, therefore USA Staffing offers a multi-layer approach to address a range of your agency's reporting needs. The USA Staffing Data Resource Center provides a wealth of information about all the ways customer agencies can access their USA Staffing data.

- **Cognos:** USA Staffing uses the IBM Cognos® Business Intelligence Tool to provide customer agencies with robust reporting capabilities on activities performed within USA Staffing. Report Author permissions are provided with no extra charge, at customer agency request. Agencies will need to decide what reports are important to their business processes as well as who will have the ability to run these reports.
- **USA Staffing Data APIs:** The library of USA Staffing Data APIs makes it easy for customer agencies to complete bulk data requests on staffing and onboarding data from USA Staffing. The APIs are REST-style APIs that will return data and links to associated data endpoints for a particular resource entity.

- **Power BI:** The USA Staffing Reporting teams are in the process of implementing Microsoft's Power BI as the new tool customer agencies will use to access their USA Staffing data. At maturity, Power BI will replace the IBM Cognos tool. Users will eventually be able to access the same robust data and similar reports that are currently available via Cognos and will also be involved in the development of interactive reports that incorporate visualizations and drill-through capabilities to better facilitate data-driven decisions at all levels. All Power BI users will, by default, have authoring capabilities as Power BI Business users. At agency request, Pro Licenses can be granted at no additional cost to customer agency users that will enable publishing of custom reports to agency-specific shared workspaces.

Step 4: Develop/Refine your Assessment Strategy

Assessments, also called assessment tools, are a critical component of any automated staffing system. They are used to screen, rate, rank and refer applicants. In a hiring context, the term "assessment" refers to any method of collecting information on individuals for the purpose of making a selection decision. Agencies using USA Staffing are responsible for developing their own assessments (or partnering with either OPM or a third-party vendor) to develop content.

A key success factor for USA Staffing implementation is to have an assessment strategy. Development of the assessment strategy should take place early in the implementation process and include both long and short-term approaches for building and managing libraries. This will help ensure that individual USA Staffing users have assessments or assessment templates ready to use once the system goes live, particularly for high-volume and mission-critical positions.

Elements of the strategy will depend on the assessments being used but should include:

- A management plan that outlines priorities and timelines
- An owner (person or group) who has expert knowledge of assessment principles and employment law and who has ultimate responsibility for the quality of the assessment process
- A team of experienced assessment and/or HR professionals to develop the assessments and coach others in the process
- Business processes and standard operating procedures surrounding various aspects of assessment development, implementation, oversight, and use

There are many factors when selecting or developing an assessment tool and an overall selection strategy. The appropriate assessment(s) depends on variables such as the number and level of vacant positions, the applicant pool, and the anticipated number of applicants based on recent experience when announcing similar positions.

Other key factors to be considered in selecting or developing an assessment strategy include:

- Critical competencies to be assessed
- Number of positions to be filled in relation to the number of applicants anticipated
- Reliability and validity evidence associated with the assessment tool
- Potential for adverse impact against race, gender, national origin, or other subgroups in the applicant population
- Cost, time, and expertise needed to develop the assessment tool
- Cost and feasibility of implementing the tool
- Costs or consequences of a bad hiring decision
- Acceptability of assessment process and tools to applicants

Identifying the most appropriate assessment tool requires careful consideration of the costs and benefits associated with each option in relation to the needs and priorities of the user. An organization may use one or multiple assessments (i.e., combined or in succession) as part of an overall assessment strategy for a given position. Your Account Manager is available to facilitate discussions between your agency and OPM's Personnel Research Psychologists to help determine the best assessment strategy based on your needs and priorities.

Training and Experience Based Questionnaires

The most commonly used assessment in USA Staffing is a training-and-experience (T&E)-based questionnaire, referred to here as an assessment questionnaire. Assessment questionnaires are designed to systematically assess applicants' previous job-related experience, education, and training using closed-ended (e.g., multiple choice) questions scored by the system. More specifically, the goal of the assessment questionnaire is to establish an initial candidate review process that screens out those without appropriate training, education, experience, or other requirements to be minimally qualified to perform the duties of the job.

Strengths	Challenges
• Low development costs • Ease with which they can be administered to large volumes of applicants • Range of competencies that can be assessed • Applicant acceptance (typically not associated with adverse impact or legal challenges) • Speed with which positions can be filled	• Low validity • Response distortion • Adequate engagement from SMEs needed • Applicant apathy

Questions are designed to cover basic entry qualifications and conditions of employment related to the position. In addition, competency- and task-based items are developed to allow candidates to identify their relevant training and experience related to critical selection competencies. Questions are based on critical job requirements and competencies identified through a job analysis.

Although USA Staffing customers have tended to rely on assessment questionnaires, Executive Order 13932 encourages agencies to consider a wide variety of assessment options as part of a strategic hiring process. In addition to assessment questionnaires, the USA Staffing system can support numerous proctored and unproctored assessment methods delivered independently or as part of a multiple-hurdles assessment approach.

Alternative assessment methods may have a particularly high return on investment when recruiting for entry level positions which skills can be learned, mission critical positions where recruitment is high stakes and high frequency, and/or for non-technical/less specialized positions for which the general competencies required for the position (e.g., reasoning and writing) are as critical or more critical than technical competencies that may have been learned through special professional training and experience (e.g., engineering or accounting). Alternate assessment methods and considerations can be found on the OPM website. An agency also may want to consider an alternative assessment method when:

- Managers are dissatisfied with the quality of applicants being referred
- Large volumes of applicants are anticipated relative to the number of positions being filled
- Large numbers of employees will be hired into a given position in the coming months or years

USA Hire: Transforming Government One Hire at a Time

USA Hire is one example of an alternative assessment method which provides Federal agencies with high-quality, cutting-edge assessments designed to help agencies hire the best by incorporating modern technology like computer adaptive questions into the process. Administration is an on-line, unproctored environment, allowing applicants the flexibility to complete competency-based assessments from any location and at a time convenient for them. Proctored testing is also available for high-stakes testing.

What USA Hire Assessments Are Available?

The **USA Hire Standard Assessments** currently covers over 130 occupational series, including Accountant, Contract Specialist, HR Specialist, IT Specialist and many more. The assessment battery for each occupation includes some combination of the following tests depending on the job series and grade:

- Interaction (non-cognitive assessment)
- Judgment
- Reading
- Reasoning
- Mathematical Reasoning

USA Hire also offers **premium and custom assessments** for leadership positions (supervisory and SES), writing, program/project management, and can develop custom assessments for agency-specific mission critical positions. USA Hire also offers an online interviewing platform: USA Hire Interview. The USA Hire Resource Center provides additional resources with detailed descriptions of

USA Hire's capabilities as well as more information on common types of assessments and sample items.

Additional Assessment Related Resources Include:

- Preloaded data within the assessments library from HR Manager, which includes extensive occupational analysis information collected by OPM I/O Psychologists over the last 15 years
- Just in time information and training videos related to hiring reform initiatives
- OPM's interactive Assessment Decision Tool, which provides agencies with customized assessment information and suggestions based on specific hiring needs.

In summary, quality assessment tools and strategies provide an increased ability to select employees who will be successful on the job. Particularly for agencies that have high volumes of applicants and fill large numbers of positions, the additional up-front time and costs associated with mapping out efficient and effective strategies are likely to have a high return on investment in the intermediate and long term. For more information on Assessments please see Appendix C – Assessment Development Questions.

Step 5: Assess your IT Needs

Evaluating your IT needs and requirements prior to implementation allows your agency sufficient time to make any needed adjustments. We recommend your evaluation include:

- Analysis of system network connectivity. USA Staffing is accessed through a secure Internet connection.
- USA Staffing users may only access the system using government-issued equipment such as laptops, tablets, and desktop computers or a virtual desktop infrastructure that is accessed using a PIV/CAC smartcard or RSA token furnished by the Government.
- Ensuring the computers of USA Staffing users have the latest version of Adobe Reader or a similar pdf viewing application.
- Ensuring the computer settings are optimal for USA Staffing use:
    - Allowing pop-ups from any Web address that ends in opm.gov and usastaffing.gov. USA Staffing uses popup windows for some features including reports and applicant materials
    - Adding *usastaffing.gov to list of trusted sites. The * is important to ensure all interfaces display correctly
    - Ensuring the browser security setting is Medium (recommended)
- USA Staffing restricts access through dual-factor authentication process that includes a unique user ID and registered PIV/CAC smartcard for each system user (one account per user). All users must have either a .gov or .mil e-mail address. All users are required to authenticate with their registered PIV/CAC card. For those without a valid permanent PIV/CAC, a temporary exception to allow login.gov authentication may be granted.
- As a security precaution, .com, .net, and .org email addresses may not be used for USA Staffing accounts.
- Ensuring the computers of USA Staffing users have compatible browsers. USA Staffing uses features that are not supported by older browsers. All system users including Human Resources users and Hiring Manager users will need to access the system from a supported browser (applicants and selectees must meet USAJOBS browser requirements). For browser compatibility, visit the USA Staffing Online Help Browser Compatibility page.

Please note: Most versions of Firefox browsers are not able to support PIV/CAC smartcard login from the web interface. You may want to consider a different browser if you anticipate that your users will want to use their PIV/CAC smartcard credentials for system authentication.

IP Address Requirements

Access to USA Staffing Stage and Cognos Stage is restricted by agency-user IP address. USA Staffing Stage and Cognos Stage cannot be accessed from non-Federal IP addresses such as those from home networks, public Wi-Fi access, or various Internet providers.

Agencies will need to provide the public-facing, outbound IP addresses for those employees that will be using the system (HR Users, Onboarding Users, and Hiring Manager Users). For most agencies, this will be a range of IP addresses based on one or more employee geographical locations.

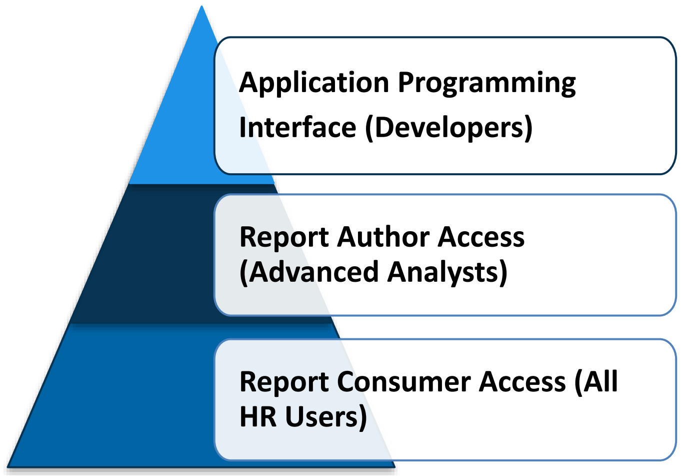
USA Staffing Stage and Cognos Stage require the most restrictive public IP address range due to best security practices so agencies will need to provide only the range that is minimally necessary for agency employees that will be accessing USA Staffing Stage and/or Cognos Stage. For example, 155.10.10.0/24 (255 addresses) is more restrictive and preferred than 155.10.0.0/16 (65,535 addresses).

If your agency has a VPN, you will also need to supply the public facing IP range for the VPN. This will ensure your agency's remote users or teleworkers can access USA Staffing Stage and Cognos Stage from the VPN connection. Users will be required to login to VPN or the agency's network in order to use USA Staffing Stage and Cognos Stage.

TIP: Some USA Staffing customers experience slow system performance due to lack of local network capacity, especially during the middle of the day. An office with low bandwidth can perceive that USA Staffing is performing slowly, when in reality, there is not enough local network capacity to carry their data out to the Internet so USA Staffing's Web servers can receive the data and respond promptly. This circumstance frustrates new users and hiring officials and can erode their confidence in USA Staffing. Sometimes the lack of bandwidth is not known until the new users are in training or trying to use USA Staffing for the first time. If network bandwidth is an issue at your agency, please notify your Account Manager as soon as possible. We can work with your IT department to identify potential bandwidth issues and recommend improvements that your IT department can implement internally to improve your agency system performance.

Step 6: Assess your Reporting Needs

The USA Staffing user interface enables easy access to a library of standard reports covering all steps of the recruitment, staffing, onboarding, and classification processes.



The IBM Cognos Business Intelligence tool is currently in use for USA Staffing reporting capabilities. Through Cognos, all HR users have access to a library of standard reports created by the USA Staffing Program Office and reports developed and maintained by internal agency report authors. These reports can be scheduled and contain defined fields that are easily manipulated and exportable in multiple formats (e.g., HTML, Excel) based on the specific need.

Advanced analysts can be granted report author access to edit and create custom reports to meet agency-specific reporting needs. Cognos report authors can share report templates and results with other Cognos users.

Microsoft Power BI is in the process of being implemented as the eventual replacement for Cognos. Power BI includes interactive report visualization, exporting, and integration features. Power BI software services also offer advanced developer tools and cloud-based servicing to provide reporting users with a more intuitive and performant reporting experience.

Application Programming Interfaces (APIs) are available for the transmission of high-volume data between USA Staffing and agency Business Intelligence systems. See Step 7 for additional details.

Staffing and Onboarding Reporting

USA Staffing maintains several data warehouses accessible via Cognos that are aimed at ensuring users have the capability to run and/or create summary level or detailed reports covering the entire staffing and onboarding process. The Hiring Data Warehouse (HDW) includes details on all major steps of staffing and onboarding, from the creation of a request through a new hire's entry on duty and everything in between.

Time to Hire Reporting

The Time to Hire app accessible via Power BI focuses on reporting on the time required to complete steps in the staffing and onboarding process in support of time to hire reporting requirements as well as the identification of bottlenecks.

Administrative Reporting

The User License data warehouse accessible via Cognos provides office administrators and account managers with data to support the administration and management of user accounts. User License reporting allows for reporting on all details associated with individual users as well as summary metrics at the organization, office, and customer levels.

Applicant Flow Data Reporting

The Applicant Flow Data Warehouse accessible via Cognos combines USAJOBS job seeker demographic data with data from key milestones in the hiring process (e.g., application, qualification, referral, selection) to provide applicant flow data (AFD). AFD allows agencies to analyze hiring process success rates by race, ethnicity, sex, and disability. The data allows agencies to identify barriers and best practices at major stages of the hiring process to support diversity, equity, inclusion, and accessibility as well as to fulfill mandatory Equal Employment Opportunity reporting requirements (e.g., MD-715). AFD does not include any Personally Identifiable Information (PII), nor is it visible to Hiring Managers. Designated AFD users must complete and adhere to Applicant Flow Data Rules of Behavior prior to accessing this sensitive, but anonymous data.

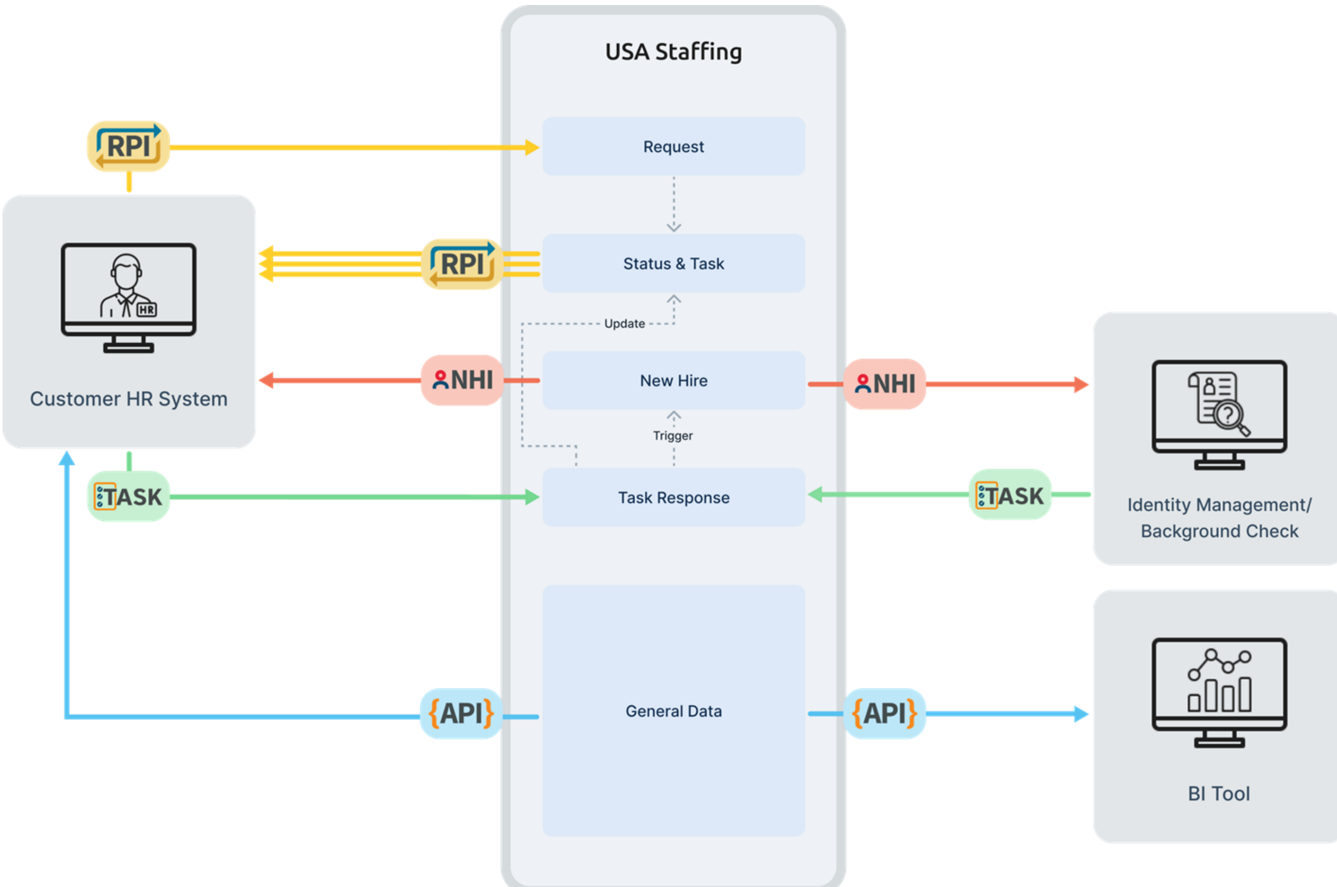
Data Dictionaries

Data Dictionaries providing detailed definitions of each piece of information reportable via the USA Staffing data warehouses are available. These data dictionaries also identify where within a particular data warehouse a piece of data is located. Data Dictionaries for the Hiring Data Warehouse, Applicant Flow Data Warehouse, and the User License data warehouse are available on the Training & Resources page of the USA Staffing Data Resource Center. Data Dictionaries for Cognos-based data warehouses can also be accessed via a Cognos standard report titled “Cognos Package Outline Report.” Data dictionaries for Power BI-based reports and data models are included in each Power BI report.

Step 7: Assess your Interconnection Needs

USA Staffing offers its customers four types of interconnections, which allow two systems to exchange data to facilitate end-to-end processes and provide visibility to key information across systems. USA Staffing customers may choose to implement **one or more agency-specific interconnections** to connect USA Staffing with their HRIT systems. All interconnections are included in your USA Staffing license fee.

Here are the four offerings, and how they could possibly be set up for functional use:



RPI Request Processing Interconnection (RPI)

Description: Bi-directional web services interconnection between agency personnel processing systems and USA Staffing.

- Agency personnel processing system initiates interconnection for a specify request by sending request data to USA Staffing. Transmitted data populates the Request, Vacancy and Announcement.
- USA Staffing sends real-time status and task updates and selectee/hire data throughout the hiring process back to the agency personnel processing system.

Recommended for:

- Agencies who want to populate USA Staffing vacancy announcements with data from their personnel systems that capture recruitment and/or position details.
- Agencies who want to receive real time USA Staffing status and task updates in their personnel system.

NHI New Hire Interconnection (NHI)

Description: Interconnection that utilizes workflows to initiate the push of new hire data from USA Staffing to agency personnel processing system(s) involved in the onboarding process. Systems in scope for the New Hire Interconnection include payroll, identity management, credentialing, provisioning, and personnel security or suitability systems.

Recommended for: Agencies who want to populate new hire data collected in USA Staffing's Onboarding forms (includes customized forms) into the agency's onboarding system(s).

{API} USA Staffing Data Application Programming Interface (Data APIs)

Description: On demand data pull from USA Staffing's Hiring Data Warehouse to agency tracking and Business Intelligence systems.

- To learn more about which Data APIs are available for customer use, visit the Data API page on the USA Staffing Data Resource Center to look through the Data Dictionary and API documentation.

Recommended for: Agencies who want to populate data, from USA Staffing's Hiring Data warehouse, into their tracking and Business Intelligence systems.

Transactional APIs (TAPI)

Description: Provide agencies with access to data across the USA Staffing system. Some TAPIs limit agencies to requesting data, while others allow them to send updates to USA Staffing.

- USA Staffing has the Task Update API (TUAPI) available at this time.

TASK Task update APIs (TUAPI)

Description: USA Staffing receives a status and task result back in the new hire's record in real time.

Recommended for: Agencies who want to populate status and task results from the agency's onboarding system(s), into the USA Staffing new hire record.

For more information: The USA Staffing team is prepared to advise customers on how best to implement interconnections given the unique combination of systems in place in the agency. More information about USA Staffing's interconnection offerings, including technical specifications, can be found on the Data Resource Center. Please direct questions to your account manager.

Establish an eOPF Interconnection

USA Staffing HR users can electronically transmit forms to OPM Enterprise Human Resources Integration (EHRI) electronic Official Personnel Folder (eOPF) system if your agency has an instance with eOPF. Your Account Manager will work with you on the eOPF System Certification SOP that is available for your reference on the USA Staffing Resource Center. This document outlines the process for preparing, testing, self-certifying, and gaining approval to activate the eOPF interconnection for any customer utilizing USA Staffing's onboarding capabilities and eOPF.

Step 8: Assess your Robotic Processing Automation (RPA) Needs

USA Staffing accommodates the use of Robotic Process Automation (RPA) (also known as Bots), encouraging innovative solutions to agency specific functions. While we try our best to continuously enhance and evolve the system, we realize that agencies may have ideas to maximize productivity with manual and repetitive processes, thus freeing up their personnel for higher value tasks.

All RPA solutions are expected to conform with the USA Staffing Statement of Service and Rules of Behavior. Agencies, which administer the RPA solution (requester, sponsor and custodian), have shared responsibility to ensure the RPA solution consistently conforms to these expectations.

The RPA Request Form is available on the USA Staffing Resources Center. The RPA Request Form outlines all RPA considerations and requirements. Please consult with your Account Manager if you have additional RPA questions.

Step 9: Assess Training Needs

Each agency will develop a different training plan based on the size and experience of their users. Resources are provided by the USA Staffing Program Office and Staff Acquisition groups to help tailor this process for your organization. This includes **training modules** broken up by section of the system to help your users become familiar with specific functionality. The USA Staffing Training Catalog and training modules can be accessed from the USA Staffing Resource Center.

The USA Staffing **online training modules** are not intended to teach participants Federal staffing procedures or how to develop quality assessments. USA Staffing allows HR users many flexibilities in collecting, evaluating, ranking, and certifying applicants. Without the wider context of the Federal staffing process, a participant in the USA Staffing online training modules is not equipped to understand the implications of making one choice over another when completing their work in the system.

Agency POCs should:

- Define Training needs for specific stakeholder groups
- Create any needed Job Aids for Users
- Implement your training regimen with your system users using a combination of online training modules, online help content, and your agency's updated business processes
- Determine how and when Hiring Managers will be trained by the agency

Webinars

The USA Staffing Program Office offers free webinars on a variety of topics. OPM USA Staffing experts facilitate webinars that provide in depth guidance on system functionality and provide ample time for discussion and questions. We recommend including webinars as part of your communications strategy with your users. Please work with your Account Manager to determine the time and topics that best meet your needs.

Coaching

Often, agencies choose to supplement user training by providing advanced, in-house coaching focused on applying agency unique business processes to USA Staffing. Your agency can contract with the OPM Staff Acquisition Group to provide virtual and/or onsite coaching from expert USA Staffing users as well as OPM Personnel Research Psychologists for assessment related support. Coaching includes practical, real-world guidance and support for your agency's users as they start implementing USA Staffing. Our customers have found offering a set number of coaching hours helps reduce anxiety and increase buy-in for changing the office business practices. Coaching also expedites the implementation timeline as your HR Specialists quickly become comfortable using the new technology. Coaching hours are priced separately from the USA Staffing license price.

Additional Training

OPM's Staff Acquisition Group has a portfolio of ready-to-deliver curricula that will teach your staff best practices in staff acquisition. Our HR professionals and personnel psychologists are highly skilled instructors. Sessions range from half-day workshops to one-week courses and can be provided remotely or onsite. They can rapidly develop new sessions or modify existing sessions to meet your particular needs. For a full list of courses offered by the Staff Acquisition Group, please consult your Account Manager.

TIP: Your agency may want to consider implementing USA Staffing in multiple phases if it will be a major change to the organization, if you anticipate resistance from a key stakeholder group, or if not, all employees will be able to begin using the system at the same time. We strongly recommend users access the Stage or Training environment immediately following the online training for a sustained amount of time. We have found that a multi-phased approach works well to establish templates, develop SOPs, and build buy-in for changing business processes before the entire organization begins using the Production system.

Important Resources

During the transition period to USA Staffing, we know you and your users will have a lot of questions about how to use the system and how to apply agency-specific business processes. There are numerous help avenues provided by USA Staffing for your agency's users.

We have found agencies that are most successful at implementing USA Staffing have an SOP in place for escalating user questions. Typically, the escalation pattern is:

Reference the online help system → Reference agency-specific SOPs or how-to guides → Ask for help from another user in your office, preferably your Office Administrator → Submit a Help Desk ticket

Some agencies have chosen to limit the number of users who access the Help Desk to only Super Users or Office Administrators. We have found the majority of user questions are most quickly answered by addressing the agency SOP, the online help system, or their Office Administrator.

Depending on the size of your user base, your agency may want to share Help Desk responsibility with OPM. Your agency may choose to create a Tier I Help Desk to address "how to" questions and refer only Tier II Help Desk questions regarding system performance to the USA Staffing Program Office via Footprints.

USA Staffing Advisory Board Resource Center

The USA Staffing Advisory Board Resource Center (ABRC) provides information about USA Staffing for your system users and implementation team, is updated regularly, and includes:

- ✓ Release Calendar
- ✓ Advisory Board Meeting Materials
- ✓ Workgroup Meeting Materials
- ✓ Product Summary, Release Notes, and Program Roadmap
- ✓ Implementation and Change Management Resources
- ✓ Resources for HR Users, Hiring Managers, and Office Administrators
- ✓ Onboarding and New Hire Resources
- ✓ Assessment Resources
- ✓ Interconnection Resources
- ✓ Reporting & Analytics Resources
- ✓ Training Resources and Dates
- ✓ Links to Stage, Training, and Production
- ✓ Links to USA Hire and USAJOBS Resources

The ABRC is an important tool to support your agency's implementation and ongoing use of USA Staffing.

Online Help Feature

The USA Staffing's online help feature is available 24 hours a day, 7 days a week for all users. The online help icon is available on every screen in USA Staffing and is designated as a question mark located in the upper right hand corner of each screen and can be accessed by selecting Review Online Help. The help text is context sensitive and provides both text and screenshots to help users understand system functionality. Content is updated with each system release.

Help Desk Support

Users can submit tickets to the USA Staffing Help Desk via the system to receive technical support and guidance. Our Help Desk is powered by FootPrints and is fully integrated into the USA Staffing system. Users receive automatic email acknowledgement of Help Desk tickets as soon as the tickets are created. Our Help Desk staff responds during business hours through email. Our Help Desk staff may initiate a phone call and/or screensharing session, if necessary. Tickets are submitted by clicking on the question mark located in the upper right hand corner of each screen and selecting Submit a Help Ticket. The ticket will prefill information based on the user and the area of the system the user is in when they select Submit a Help Ticket.

The USA Staffing Virtual Assistance Now (VAN) Chatbot assists users with the login process. The chatbot is accessed by clicking on the chat bubble located on the main login page. The chatbot provides resolutions for approximately 60 login paths which may be encountered by HR users, Hiring Managers, and Onboarding users.

Step 10: Continue to Engage

The USA Staffing Program Office understands the enduring need for automated staffing technology. We are committed to long-term partnerships with our customer agencies and appreciate that you have chosen USA Staffing to meet your federal hiring needs. We understand each agency has unique business processes and challenges that will impact the strategy you choose to implement and use the system over time. We trust this Implementation Guide will serve as a starting point for your internal discussions but hope that the conversations continue throughout your use of the system. Identifying best practices, refining assessment strategies, and pulling the right data for reports are all examples of areas to continually work on. We welcome participation in our Advisory Board and ad hoc workgroups to ensure your agency is continually informed on the latest federal HR information.

In conclusion, we would like to share several success factors that we have observed over 40 years of implementing automated solutions to federal agencies. We recommend keeping these and their relevant challenges in mind as you customize your implementation strategy to increase the likelihood of success of your organization.

- ✓ **Continue meeting with your Account Manager.** Your Account Manager is available throughout your partnership with USA Staffing and is a valuable resource in helping your agency meet hiring reform guidelines and improve your agency hiring processes.
- ✓ **Determine if a new main USA Staffing POC will be assigned post-implementation.** Your Account Manager will work closely with your main POC(s) throughout your partnership with USA Staffing.
- ✓ **Attend Advisory Board meetings.** USA Staffing customers play an essential role in expressing customer needs and providing feedback on system functionality in alignment with agency hiring goals and priorities. We welcome representatives from each customer agency to participate on our USA Staffing Advisory Board. The Advisory Board acts as the voice of the customer in USA Staffing governance. The purpose of the USA Staffing Advisory Board is to ensure formal, open communication between the USA Staffing Program Office and agency customers regarding system functionality, performance, product strategy, and related services.
  - The USA Staffing Advisory Board meets regularly to discuss items relevant to the entire user community such as the program roadmap, hiring initiatives, and policy updates. During these meetings, USA Staffing provides system demonstrations and collects feedback on new features. In addition, agencies can participate in Advisory Board sub-groups on specific topics such as interconnections, assessments, and reporting to provide real-time input on system functionality.
  - Members of the Advisory Board must be familiar with USA Staffing, its use within their agency, and be positioned to represent their entire agency to the USA Staffing

Program Office. Advisory Board members may be asked to serve in a variety of ways including (but not limited to):

- Lead internal change management activities to communicate, educate and implement new system features within their agencies
- Provide their hiring expertise or connect the USA Staffing team to stakeholder in their agency to share ideas and feedback on new initiatives
- Coordinate license renewal and billing for their agencies
- Disseminate resources and information provided on the USA Staffing Resource Center as appropriate for their system approach
- Oversee the submission of help desk tickets for USA Staffing related items that impact their users
- Respond to the USA Staffing Customer Satisfaction Survey to provide feedback on the status of the partnership
- Nominate expert system users from their agency to participate in USA Staffing workgroups (e.g., joint application design sessions and customer acceptance testing)
- Coordinate responses to requests for information on behalf of their agency
- Connect the USA Staffing Program office with subject matter experts (SMEs) within their agency as needed (e.g., CIO, policy, CFO)

- Each USA Staffing customer agency may have representation on the USA Staffing Advisory Board. In cases where there is more than one Advisory Board member, each agency should designate one Advisory Board member to act as the main point of contact for their agency. Communication with the Advisory Board is bidirectional, meaning members are expected to both share USA Staffing updates with agency stakeholders as well as share feedback from agency SMEs with the USA Staffing Program Office.

✓ **Regularly update your SOPs.** Completing USA Staffing implementation represents the closure of Phase I of the partnership with USA Staffing. Phase II, ongoing support, requires regular communication and evaluation to ensure lasting success. As Federal hiring guidelines and agency policies change, USA Staffing is dedicated to providing system changes and new features to help you meet your requirements. We recommend creating a recurring update schedule to ensure your SOPs reflect the most current processes used by your agency, taking into account applicable USA Staffing system changes and new features.

✓ **Ensure Office Administrator(s) keep abreast of system changes.** Office Administrators should continuously update announcement templates, ensure system configurations are accurate, and keep users informed. Office Administrators should ensure inactive users, including hiring official accounts, are deleted (if they are no longer needed) on a regular basis.

✓ **Continue providing regular communication to your stakeholders.**
Communication is the #1 KEY to success!!

Success Factors

- Strong Implementation planning & coordination from agency Implementation Team
- Regular communications to all stakeholders
- Centralized training coordination
- Development of a quality assessment strategy
- Beginning with a phased implementation of USA Staffing and applying lessons learned
- Close collaboration between the agency Implementation Team & USA Staffing Account Manager to continually improve the implementation process

Challenges

- Lack of sufficient staffing workload to sustain learning the new process of using USA Staffing
- Lack of an assessment development strategy and measurement expertise
- Lack of communication/coordination with stakeholder groups within the agency (e.g., system users, Hiring Officials, senior leadership, union representatives, and applicants)
- Suboptimal information technology (IT) infrastructure at agency locations
- High rate of HR users with a lack of Federal staffing knowledge/experience

Helpful Links

- [USA Staffing Resource Center]
- [USA Staffing Production]
- [USA Staffing Stage]
- [USA Staffing Training]
- [eOPF Test Environment]
- [USAJOBS Test]
- [USAJOBS Production]
- [USA Staffing Online Course Portal]

Appendix A – Stakeholder Analysis

Below are some questions to help your implementation team develop a stakeholder analysis.

- What are the goals of the communications strategy?
- What information do you want to convey to each stakeholder group about implementing USA Staffing?
- Who is the executive-level champion for this project?
- What groups, individuals, and organizations are impacted by the transition to USA Staffing?
- Which stakeholder groups need to approve the implementation?
- Who should represent and/or speak for each stakeholder group?
- What does each stakeholder group need to know about the transition?
- What motivations and interests are impacted by the transition to USA Staffing?
- What types of communication tools (e.g., web sites, emails, town hall meetings, and flyers) are appropriate or effective for each group?
- What communications capacity does your group have internally? Does your agency have a communications department you can leverage? Can you use outside support to help with this effort?
- Have you completed similar communication efforts in the past? What approaches were effective? What lessons can you apply from past experience?
- What is your timeline for implementation? When will the first posting be announced? If transitioning from a previous automated tool, when will you discontinue work in there?
- Who should communicate this information? When and how will they do this?
- How will you evaluate your efforts?

Sample Template

Name of Stakeholder/ Group	Department	Needs	Can help by…	Can hinder by…	Communication Tools

Your Account Manager can provide additional templates (e.g., RACI).

Appendix B – Decisions for your Agency

Part of your role in USA Staffing may be making decisions that have implications at the Organization, Office or even agency wide. Please consult with your Account Manager on which decisions may apply to you. Examples include (but are not limited) to the following areas:

Decision Point	Areas of the System	Your Agency's Approach
Naming Conventions: areas of the system where you can create a streamlined approach to names	• Position Description Numbers • Request Numbers • Announcement Number • Announcement Templates • Assessment Questionnaires • Assessment Package Templates • External Contacts • Customers • Reviews	
Case File Approach: Review your policy for retaining these materials	Determine what information needs to be stored in the electronic case file in USA Staffing (e.g., Position Description, SF-52, system-generated Vacancy Identification Number, customer communications), specific naming conventions for case file documents, and if you also need to keep a paper copy.	
General contacts: Created in Administration	They can be assigned as the points of contact for announcements posted to USAJOBS and onboarding related questions or issues.	
Requests: How will users utilize Request? How will assignments of Requests be handled?	(1) HR users will enter requests directly in USA Staffing based on Hiring Manager needs determined outside of the system. (2) Hiring Manager Users will generate requests directly in USA Staffing and submit the requests to HR users to approve. (3) Requests will be sent electronically to USA Staffing from another system through a Request Processing Interconnection.	

Decision Point	Areas of the System	Your Agency's Approach
Classification/PD Library Decisions: Will your agency utilize the classification functionality within USA Staffing?	USA Staffing allows Classifiers to manage the process of building PDs, capturing Hiring Manager/Authorizer feedback through Reviews, capturing electronic signatures, and grant access to the PD library to Hiring Managers. You can also capture basic information such as a PD reference number, title, pay plan, series, and grade for a PD.	
Eligibility Library: Who will populate this information/have permissions to?	USA Staffing has sample language for 14 standard government-wide eligibilities. Eligibilities are limited to yes/no responses and will require an HR user to verify an applicant's claim during the applicant review/referral/selection process. Eligibilities are most commonly utilized if a claim by an applicant needs to be verified and adjudicated by an HR user prior to certification of the applicant.	
Assessment Library/ Competency Network:	The reuse of Competencies, Items, and Templates should provide a rich set of data that will enable you to refine your assessment process to find the highest qualified set of candidates in the future. Assessment Items can be linked to competencies as part of a competency network or within an Assessment Package Template if they are to be used as screen outs, determine minimum qualifications, or be otherwise rated by an assessment.	
Reviews: When will Review be utilized in your office?	HR users can send a review of the announcement text and/ or the announcement questionnaire to a Hiring Manager prior to releasing to USAJOBS. HR users can send a review of one or more hiring certificates to a Hiring Manager following the certification of submitted applications.	

Decision Point	Areas of the System	Your Agency's Approach
Onboarding/New Hire Decisions:	The USA Staffing Onboarding Feature Implementation Guide on the USA Staffing Resource Center outlines agency decision points such as user access, tasks, workflows, and user permissions. This guide is essential to a successful deployment Onboarding for your agency.	
Permissions	• Who will oversee permissions? • Do you need custom permission profiles?	

Appendix C – Assessment Development Questions

Considerations in Developing an Assessment Strategy

Organizations using quality assessments are better able to hire individuals with the competencies and skills they seek and to ensure that time spent by both applicants and agency personnel adds value to the decision-making process. Additionally, selection errors can have serious financial and other business impacts on organizations. The consequences of even a single selection error can create problems for an entire work unit, and some selection errors can have organization-wide consequences such as customer service complaints, poor work quality, or damage to the reputation of the agency.

Quality assessments also benefit employees to the extent that they are matched to jobs for which they are well-suited. In addition, using carefully developed assessment tools often results in more favorable applicant reactions to the selection process. Such perceptions have lasting consequences for the agency, including promoting a positive image of the organization, increasing the likelihood of the applicant accepting a job offer, increasing the number of job referrals, and reducing the risk of legal challenges and complaints.

When developing the assessment strategy your agency will use in USA Staffing, we recommend considering the following types of questions:

- Will you use assessment questionnaires and/or other assessment options? Are there particular positions for which other assessment options may have a higher return on investment?
- How might you be able to utilize a multiple-hurdles assessment strategy (e.g., combining an assessment questionnaire with a structured interview or written demonstration) to maximize hiring outcomes?
- Who will create the assessments for your agency?
- Do you have in-house expertise to develop the questionnaires and/or other assessments? Do you want to centralize assessment questionnaire development?
- How are you going to maintain consistency and quality in your assessments?
- Do you want to contract with OPM or another group to create the assessments?
- To what extent will you utilize assessment templates?
- Will assessments be available across offices?
- How can you best coordinate with your SMEs to conduct job analysis and carry out assessment questionnaire development as part of the workforce planning phase?
- Will you work with SMEs to develop customized rating scales?
- Do you want to keep applicants from being able to edit assessment responses after they submit an online application?

- Do you want to force an applicant to respond to all questions marked as required before they are allowed to submit an online application?
- Do you want to ensure that all questions are marked as required for an application?
- Will you use warning/verification statements for applicants to discourage score inflation?
- Will you use eligibilities to distinguish different types of applicants?
- What will be your methodology for scoring the assessment questionnaires (e.g., task-based scoring, KSA-based scoring, weighting of items and factors)?
- How will scores be weighted when using a multiple assessment approach?
- How will you evaluate how well your assessments are working in order to make adjustments as needed?
- Does your agency have delegated authority to administer the Administrative Careers with America (ACWA) exam? (If yes, the USA Staffing Program Office will import the appropriate ACWA exams into USA Staffing for your agency's use.

Helpful hints to make the most out of Assessment Questionnaires:

- ✓ Start the assessment development process during the workforce planning stage (i.e., prior to the start of OPM's 80-day hiring process)
- ✓ Use only up-to-date and high-quality job analysis information as a starting point for questionnaire development
- ✓ Implement business processes that promote quality assessments and accountability, including:
    - Establishing clear standards of quality based on assessment/measurement legal guidelines, standards, and principles
    - Training HR professionals and subject matter experts (SMEs) in good assessment and item writing practices
    - Assigning experienced questionnaire developers to the development and review of assessment questionnaire templates
    - Arranging for SME involvement in the development and review of all assessment questionnaires
- ✓ Develop procedures related to documentation, storage, and retrieval of assessments, taking advantage of the USA Staffing assessment library capabilities
- ✓ Have a process for requesting, developing and implementing new templates
- ✓ Incorporate a verification process whereby qualifications of referred applicants are verified by trained HR professionals based on a manual review of their supporting documents and/or other independent sources
- ✓ Evaluate the questionnaires to ensure they are making meaningful distinctions among applicants and that their use is resulting in quality hires

For additional help with Assessments check out OPM's Assessment and Evaluation page.

Appendix D – Alternative Application Questions

- Determine who applicants will contact to request an alternative application process for non-USA Hire announcements.
- Consider who may apply via an alternative application process – this process should only be used for applicants that are unable to apply online and as a last resort. Applying online, through their USAJOBS account will expedite the application process and allow applicants to check their application status as well as verify the documentation submitted with your application. If they utilize the Alternate Application method, their USAJOBS account will not display this application and they will not receive status updates.
- Be sure to include instructions in announcement templates.
- Develop operating procedures to receive and upload custom forms and supporting documents.