

# USA Staffing

# Shared Certificate

# Guide

**A guide to using shared certificates in alignment with  
the Competitive Service Act**

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**Table of Contents**

Introduction ..... 4

Roles and Responsibilities ..... 4

    Agency ..... 4

    Original Agency ..... 4

        Talent Pool Manager ..... 4

    Receiving Agency ..... 5

        Shared Certificate Coordinator ..... 5

        General Agency Talent Portal User ..... 6

Preparing Vacancy to Share Applicants (*Original Agency*) ..... 7

    USA Staffing Admin Area Setup ..... 7

        Add the appropriate language into your announcement template ..... 7

        Add an item to your announcement item library that will allow applicants to opt in or opt out ..... 7

        Create a shared customer that will allow you to provide receiving agencies access to review(s) ..... 8

Announce Vacancy (*Original Agency*) ..... 8

    Add Vacancy Tag to help with tracking and reporting ..... 8

    Add the “Shared Certificates – Opt In” announcement item ..... 9

    Use the Shared Certificates Announcement Template ..... 9

Determine if a Certificate is Eligible to be Shared ..... 9

    Identify a list of Applicants to share ..... 10

Create and Publish USAJOBS Talent Pool ..... 10

    Create a Talent Pool - (*Talent Pool Manager*) ..... 10

    Copy a Talent Pool - (*Shared Certificate Coordinator*) ..... 11

Documentation Reminder ..... 12

Request Access Shared Certificate ..... 12

    Indicate interest in viewing a shared certificate and request access (*Shared Certificate Coordinator*) ..... 12

    Create Hiring Manager account in USA Staffing (*Original Agency*) ..... 13

        Original Agency sends the shared certificate to Receiving Agency ..... 13

Documentation Reminder ..... 14

Announce Internally ..... 15

    Return the Applicant List Review to the Original Agency ..... 15

    Notify applicants of non-selection ..... 15

Creating a Request in USA Staffing..... 16

- If the Receiving Agency makes a selection from the Shared Certificate.....16
- If the Receiving Agency does not make a selection from the Shared Certificate .....16

Documentation Reminder ..... 16

Update Copied Talent Pool - (*Shared Certificate Coordinator*)..... 17

Required Documentation ..... 17

- Maintain case file documentation of the shared certificate(s) .....17

## Introduction

On March 18, 2016, the Competitive Service Act of 2015 was enacted as Public Law 114-137. The “Act” allows an “appointing authority” to share a competitive certificate issued under delegated examining procedures with one or more “appointing authorities” to make an appointment to a position that is in the same occupational series, grade level (or equivalent), full performance level, and duty location during the 240-day period beginning on the date of issuance of the certificate of eligibles. To view the Competitive Service Act, please visit <https://www.congress.gov/114/crpt/hrpt367/CRPT-114hrpt367.pdf>.

This guide is intended to provide Federal agencies with guidance on how to use shared certificates in the USA Staffing® Talent Acquisition System, in accordance with the Competitive Service Act. It draws on staffing processes and system terminology that should be familiar to Federal HR Specialists.

Also included in this guide are steps to incorporate USAJOBS’ Talent Pool feature to help “advertise” available candidates on shared certificates who have opted in to having their application materials shared with multiple agencies across government under the Competitive Service Act (CSA). Talent Pools allow hiring managers and HR specialists to quickly view resumes and determine if they want access to the certificate in the Talent Acquisition System (TAS).

## Roles and Responsibilities

### Agency

The term agency is used throughout this guide and is defined the cabinet-level department.

### Original Agency

The agency that owns the vacancy and certificate(s) that will be shared as part of the Competitive Service Act (CSA). The original agency’s HR Specialist is responsible for ensuring their vacancy is set up properly (see Preparing Vacancy to Share Applicants steps) and follows all requirements for sharing a DE certificate under the CSA.

### Talent Pool Manager

An HR Specialist from the original agency that is Delegated Examining certified and is the individual who worked on the CSA announcement and issued the certificate(s) of eligibles.

The primary responsibility of the Talent Pool Manager is to create the Talent Pools in the USAJOBS Agency Talent Portal. The Talent Pool Manager is the one to provide or coordinate access with the receiving agency’s requests through their Shared Certificate Coordinator for

the actual certificate in the TAS and provide the receiving agency's Shared Cert Coordinator with a copy of all documentation pertaining to the creation of that certificate (e.g., the job analysis, JOA, rating schedule/crediting plan, application materials of those certified and opting-in to having their information shared, etc.). Talent Pool Managers will be assigned the role in the USAJOBS Agency Talent Portal with approval from OPM's Hiring Experience Group.

In USAJOBS, the Talent Pool Manager will:

- Create a CSA talent pool that includes only those referred candidates who have opted in to having their application materials shared with other Federal agencies not related to the original agency and have not been selected for a position with the original agency.
- Serve as the Point of Contact for receiving agency's Shared Cert Coordinators and General Agency Users.
- Be the sole owner of the original agency's talent pools and will be the only individual who would be able to archive talent pools either because all candidates from that talent pool have already been selected or that talent pools were created in error.

## Receiving Agency

The agency who is using the original agency's shared certificate(s) for their own hiring needs.

Receiving agencies consist of two different user types, Shared Certificate Coordinator(s) and General Agency Talent Portal user(s).

### Shared Certificate Coordinator

An HR Specialist at the receiving agency who understands their agency's hiring needs, is Delegated Examining certified, and will be the one to manage their agency's copy of the talent pool. Shared Certificate Coordinators must attend a USAJOBS training on using Talent Pools before gaining access to the role. This person also coordinates the receipt and selection decision process of shared certificates within USA Staffing.

In the USAJOBS Agency Talent Portal, the Shared Certificate Coordinator will:

- Copy a talent pool that matches the hiring needs of their agency.
- Contact each candidate on the list to confirm if they are interested in positions at their agency.
- Share the list of candidates with their agency's Agency Talent Portal users
- Update the list based on who is selected or declined.

In USA Staffing, the Shared Certificate Coordinator will:

- Create requests to fill.
- Act as Reviewer or liaison for the Hiring Manager when making official selection(s) from an Applicant List review.
- Ensure all appropriate documentation is uploaded to the official vacancy case file to link the selection on the shared certificate to the Talent Pool.
- Facilitate the kickoff of the onboarding process for the selectee.

### **General Agency Talent Portal User**

HR Specialist, Hiring Manager or Recruiter at Receiving Agency that will be using the agency copy of the talent pool shared by their Shared Certificate Coordinator.

If you wish to use USAJOBS' Agency Talent Portal, you can email the USAJOBS help desk at [recruiter-help@usajobs.gov](mailto:recruiter-help@usajobs.gov) to request one of these roles. NOTE: Talent Pool Manager role requires approval from OPM's Hiring Experience (HX) Group ([HX@opm.gov](mailto:HX@opm.gov)) and the Shared Certificate Coordinator role require training before the role can be assigned.

## Preparing Vacancy to Share Applicants (Original Agency)

Agencies should have a shared certificate Standard Operating Procedure in place before designating a job opportunity announcement as shared.

### USA Staffing Admin Area Setup

#### Add the appropriate language into your announcement template

1. Go to the Admin section of the system.
2. In the Templates section, select Manage Announcement Templates.
3. Select the template you will use when announcing a vacancy that may ultimately be shared with another agency. At this point you may also choose to create a new template or copy an existing template.
4. Add the following language into the “How You Will Be Evaluated” section of the announcement:

*When [Customer CPDF Agency Data Insert] completes its hiring, the remaining list of qualified candidates may be shared with additional federal agencies. You will have an opportunity to opt-in if you would like your name, application material, and assessment results shared to be considered for employment with additional agencies. There is no guarantee of further consideration, and you can continue to explore other job opportunity announcements.*

#### Add an item to your announcement item library that will allow applicants to opt in or opt out

NOTE: It is highly important when creating the announcement item the item header, item stem and item responses

1. Go to the Admin section of the system.
2. In the Libraries section, select Manage Announcement Items.
3. Click Create New Item.
4. Enter “Shared Certificates – Opt In” as the Item Header.
5. In the Required drop down, select Yes.
6. Select your office from the Owning Office dropdown options.
7. Add any additional Tags, as applicable.
8. In the Item Stem, insert the following language:

*When **{{Customer CPDF Agency Placeholder}}** completes its hiring, the remaining list of qualified candidates may be shared with hiring managers and Human Resources specialists at additional agencies who are hiring for similar positions. Please opt-in here if you would like your name, application material, and assessment results shared with additional agencies.*

*There is no guarantee of further consideration, and you can continue to explore other job opportunity announcements.*

9. In the Response Type dropdown, select Multiple Choice – Single Select
10. In the Response text, enter:
  - a. *I consent to having my name, application materials, and assessment results shared with other agencies. I opt in to having this information shared with additional agencies who are hiring for similar positions.*
  - b. *I only want to be considered by this agency. I opt-out of having my name, application materials, and assessment results shared with additional agencies.*

### **Create a shared customer that will allow you to provide receiving agencies access to review(s)**

If certificates will be shared with multiple agencies, you may choose to create a separate customer for each agency, or to create a single shared customer which will be used to link all the Hiring Manager user accounts for the requesting agency points of contact.

1. Go to the Admin section of the system.
2. In the Maintenance section, select Manage Customers.
3. Click Create Customer.
4. In the Customer Information section,
  - a. Enter your agency name followed by “Shared Customer” as the Internal and External Customer Name.
  - b. Enter your agency information in the Address, City, State, Zip Code, Country, and Phone Number fields.
5. In the Organization Details section,
  - a. Select your USA Staffing Organization and Office from the dropdown items.
  - b. In the CDPF Organization, select your organization.
  - c. In the CDPF Agency, select your agency.
6. Leave the information in the Onboarding Defaults subtab blank.

## **Announce Vacancy (Original Agency)**

### **Add Vacancy Tag to help with tracking and reporting**

On the Vacancy tab, Settings page, within the Vacancy Tags area, select the “Shared Recruitment” tag from the Appointing Authority drop down. Note: This should be added as soon as you confirm a certificate(s) will be shared from the vacancy.

### Add the “Shared Certificates – Opt In” announcement item

1. On the Announcement tab, Announcement Questionnaire page, click the Add to Preferences drop down that appears on the far right side of the Preferences section.
2. Select Item from Library.
3. Select the Shared Certificates – Opt In item from the list.
4. Click Add Items to Preferences.
5. Click Save Sections.

### Use the Shared Certificates Announcement Template

1. When clicking into the Announcement Text subtab of the Announcement tab, the Choose Template prompt appears.
2. Select the applicable template containing the shared certificates language in the How You Will Be Evaluated section.

## Determine if a Certificate is Eligible to be Shared

If an agency is interested in receiving a certificate(s) from one of your existing announcements, ensure the announcement meets the following criteria before doing so.

The announcement must have:

- Been opened through a Delegated Examining Authority;
- Been for a vacancy that is in the same occupational series, grade level (or equivalent), full performance level, and duty location of the one being filled by the receiving agency;
- Provided notice that the resulting list of candidates may be used by one or more agencies;
- Provided an opportunity for applicants to “opt in” to have their application material shared; and,
- It cannot be beyond 240 calendar days from the original certificate issue date.

All of the above must be met in order for sharing to occur; if not all met, any certificate from the announcement is not eligible to be shared under the provisions of the Act.

## Identify a list of Applicants to share

As an original agency participating in the CSA, you may not share candidates in a Talent Pool until your agency has completed making selections and has audited the original certificate(s) issued to the original agency's hiring manager(s). Completing the certificate audit for the original agency's certificate(s) will ensure that any applicant(s) already selected by the original agency will not be shared on the Talent Pool.

1. Navigate to the Applicant Overview tab.
2. Click Create List.
3. Select the Category Rating Certificate Type.
4. Select the same Ordering Criteria and Filters used to issue the original Category Rating certificate. Depending on the volume of qualified candidates, you may wish to share both the veterans and the non-veterans in the highest category.
5. Select the Status (RSC) filters for AC.
6. Click the Add button next to Advanced Criteria.
7. Name the filter, e.g., "Opt in applicants only"
8. Select the Shared Certificates – Opt In question from the Item dropdown options.
9. Select Response Option for A. I consent to having my name, application materials, and assessment results shared with other agencies. I opt-in to having this information shared with additional agencies who are hiring for similar positions.
10. Click Apply.
11. Click **Generate Stored List** and use the naming convention outlined below:
  - a. *Original certificate number-SHARED-Agency Talent Pool.*

Repeat the steps above for every certificate you want to share and create a separate Talent Pool for each one using the steps outlined in the next section.

## Create and Publish USAJOBS Talent Pool

### Create a Talent Pool - (*Talent Pool Manager*)

The purpose of Talent Pools is to "advertise" available candidates on shared certificates who have opted in to having their application materials shared with multiple agencies across government from Competitive Service Act (CSA) hiring actions. Talent Pools allow hiring managers and HR specialists to quickly view resumes and determine if they want access to the certificate in the Talent Acquisition System (TAS). Each certificate you want to share with other agencies will require its own Talent Pool be created.

1. While creating a Talent Pool, you will need to refer to the following information from your vacancy and stored list(s) created in the steps above.
  - a. Position title
  - b. USAJOBS control number
  - c. Series

- d. Grade
  - e. Location associated with original certificate (s)
  - f. Original certificate(s) issue date
  - g. The date used for this field will determine the length of time candidates are available in the Talent Pool
  - h. Candidate's full name (sorted in alphabetical order by last name)
  - i. Candidate's email address associated with that application
  - j. Candidate's adjudicated veterans' preference determination
2. Log in to [agencyportal.usajobs.gov](https://agencyportal.usajobs.gov) or click the *Recruit* button on the top menu within USA Staffing.
  3. Click on the Talent Pools menu, then click the *Create new Talent Pool* button.
  4. USAJOBS will populate a list of all applicants who started an application package based on the USAJOBS Control Number you provide. NOTE: Applicants that were key entered in USA Staffing will not appear in the Talent Pool list. If you key-entered applicants, contact USAJOBS for further instructions at [recruiter-help@usajobs.gov](mailto:recruiter-help@usajobs.gov).
    - a. As the Talent Pool Manager, you will need to carefully review the results provided and select only those candidates that appear on the original certificate, were not selected by the originating agency, AND have opt-ed in to have their application shared.
    - b. On the next screen you will have to identify the correct preference eligible or non-preference eligible that matches with the candidate's adjudicate veterans' preference.

Note: If you need to remove or edit a candidate on or off the talent pool once it has been published, you must "Archive" it by clicking the "Archive" button at the bottom of the Published page. You will need to select one of the two options: All candidates have been selected or it was posted in error or has incorrect information.

## Copy a Talent Pool - (Shared Certificate Coordinator)

To request access to a Talent Pool, the receiving agency must identify an individual to serve as a Shared Certificate Coordinator who will receive training from the USAJOBS Program Office. The Shared Certificate Coordinator will request access to available Talent Pools in the USAJOBS Agency Talent Portal (ATP). In order to request an ATP account and become a shared certificate coordinator, please email the USAJOBS help desk at [recruiter-help@usajobs.gov](mailto:recruiter-help@usajobs.gov). The USAJOBS Help Desk will send you an invitation to create an ATP account.

1. Once a Talent Pool is created in the USAJOBS ATP, you will receive an email that the Talent Pool is available and which agency created it.
2. Log in to [agencyportal.usajobs.gov](https://agencyportal.usajobs.gov) or click the *Recruit* button on the top menu within USA Staffing.
3. Click on the Talent Pools menu, then click Available CSA Pools.
4. Select the box(es) for the Talent Pools you want to copy and enter the number of Estimated Vacancies and then click the Submit Request button at the bottom of the page.
5. Navigate to the *Copied CSA pools* tab to open your copied Talent Pool.

6. Once a Shared Certificate Coordinator has requested a copy of an available Talent Pool in ATP, they must complete the *Next Steps* shown on the top of the page which includes contacting all candidates within that talent pool to confirm they are still interested in positions at the receiving agency.
  - a. The receiving agency will need to establish a deadline for receiving applicant responses for interest in remaining in the Talent Pool. If the applicant does not respond within the established deadline, then the Shared Certificate Coordinator can mark them *Failed to Reply*. This deadline must be determined prior to sharing the Talent Pool with the receiving agency's agency talent portal users. Note, applicant marked as Failed to Reply or Not Interested will not appear on Talent Pool once it is shared.
7. Once all these steps are completed, your copied Talent Pool can now be shared and available to all Agency Admin or Agency General User of USAJOBS' Agency Talent Portal at your agency.
8. The Talent Pool will remain active in your *Copied CSA pools* tab and will allow the SCC to update applicant responses to Selected or Declined, as needed.

## Documentation Reminder

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Once your Talent Pool has been shared on the Agency Talent Portal, click the Export talent pool report (PDF) link to download a copy for your case file.

## Request Access Shared Certificate

### Indicate interest in viewing a shared certificate and request access (*Shared Certificate Coordinator*)

Contact the original agency's Talent Pool Manager through the USAJOBS ATP and indicate interest in receiving shared certificates from them. You may wish to request a copy of the announcement, job analysis, and assessment(s) to confirm the positions are similar.

- You can contact the original agency by clicking the name of the individual showing as *Created by* on the top left corner of the Talent Pool.
- Be sure to include the Job Announcement number list for the Talent Pool of interest so the original agency can find the associated shared certificate in USA Staffing.
- If you do not currently have a Hiring Manager User account with the original agency, they will need to create one for you at this time.

## Create Hiring Manager account in USA Staffing (Original Agency)

The Talent Pool Manager or other HR User from the Original Agency with access to the shared certificate will need to verify if Hiring Manager accounts already exist for the Receiving Agency users.

1. Search the Manage Users area for the Receiving Agency users by email.
  - a. If a user account exists make sure the user has access Hiring Manager permissions to the Shared Customer created in previous steps.
  - b. If a user account does not exist, create a Hiring Manager user account and grant permission to the Shared Customer created above.
2. Complete the same process for all additional Receiving Agency Hiring Managers received on the initial request for access.

After the access is granted, log into the USA Staffing system. If you have an account in multiple tenants or with multiple user types, be sure you are logging in to the original agency's tenant as a **Hiring Manager User**.

## Original Agency sends the shared certificate to Receiving Agency

### Create Applicant List Review & Send to Shared Certificate Coordinator

1. Navigate to the Applicant Overview tab.
2. Click Create List.
3. Select the Category Rating Certificate Type.
4. Select the same Ordering Criteria and Filters used to issue the original Category Rating certificate. Depending on the volume of qualified candidates, you may wish to share both the veterans and the non-veterans in the highest category.
5. Select the Status (RSC) filters for AC.
6. Click the Add button next to Advanced Criteria.
7. Name the filter, e.g., "Opt in applicants only"
8. Select the Shared Certificates – Opt In question from the Item dropdown options.
9. Select Response Option for A. I consent to having my name, application materials, and assessment results shared with other agencies. I opt-in to having this information shared with additional agencies who are hiring for similar positions.
10. Click Apply.
11. Issue the certificate.
12. Open certificate and navigate to Certificate Information tab.
  - a. Within top header for certificate, change the expiration date to match the date on your original certificate (the one issued to the original hiring manager).
  - b. In the Certificate Details section, select the edit icon for the Applicant List Name.
    - i. Name the Applicant List with the *original certificate number – SHARED-Agency*

Repeat the steps above for every certificate you want to share.

Use this link to find instructions on Creating an Applicant List Review from your shared certificate:  
[https://help.usastaffing.gov/USAS/index.php?title=Creating a review from a certificate](https://help.usastaffing.gov/USAS/index.php?title=Creating_a_review_from_a_certificate)

## Documentation Reminder

To ensure the Receiving Agency has all required documentation for their case files, the Original Agency must include a copy of the Job Analysis documentation associated with their Vacancy. This documentation should be in the Documents area of the Applicant List Review.

### Receiving Agency accesses shared certificate

#### Access the shared certificate(s) that were sent to you

1. Log into USA Staffing
  - a. For individuals who use USA Staffing for their own recruitment actions (different than the shared certificate program), you will want to make sure you are in the tenant assigned by the original agency who is sharing the certificate. Also, if you hold another user type (HR User or Onboarding User) within USA Staffing you will want to make sure you are logged into the Hiring Manager interface to review the shared certificate.
2. Locate the review in the Reviews section.
3. Click the review name to open the review.
4. Click the certificate(s) you want to review.

#### Review the referred applicants on the shared certificate(s) and make selection decision

- As soon as the Shared Certificate Coordinator receives the Applicant List Review the applicants on the shared certificate and annotate the appropriate Return Status Code based on the information provided on the exported talent pool report. This will ensure the other Hiring Manager Users will clearly see who is available for potential selection.
  - For applicants who Failed to Respond to email sent through the Agency Talent Pool mark them Failed to Reply
  - For applicants who responded to email sent through the Agency Talent Pool 'Not Interested', mark them as either Withdrawn from Consideration or Declined Interview/Assessment, whichever is most appropriate.
- Within the Applicant List Review, Hiring Manager users can review applicant documentation, add applicant notes and toggles, view applicant assessment questionnaire responses, eligibility claims and adjudications. If an applicant is selected from the shared certificate mark their Return Status Code as 'Selected'.

## Return the Applicant List Review to the Original Agency

### Announce Internally

If a selection is envisioned from the shared certificate(s), they first must provide notice of the available vacancy to its own employees, give them up to 10 days to apply, and review their qualifications before a selection can be made from the certificate from an outside agency. Please follow the internal announcement guidance outlined in your agency's shared certificate Standard Operating Procedure.

**Note:** *The announcement open period may not exceed 10 days. The law does not permit an internal application period beyond 10 days to satisfy this requirement. Store all documents and selection decisions related to the shared certificate in the vacancy case file for audit purposes.*

Prior to taking the steps below, be sure to print a copy of the Certificate of Eligibles and Job Opportunity Announcement from the Applicant List Review. These documents will need to be uploaded into a centralized case file in later steps.

1. Return to the Review Overview tab.
2. Select an approval status from the dropdown.
3. Click the Return to HR button.

Note: Once the review is returned by a user, no other users with access to the review can make any changes to the certificate. If the review is not returned, it will automatically be recalled once it reaches 240 days from the original certificate issue date.

### Notify applicants of non-selection

The Receiving Agency will need to establish a process for notifying applicants of their non-selection. All applicant email addresses can be found on the Certificate of Eligible document downloaded in previous steps outlined in the Applicant List Review section of this document. See sample language below:

Subject: Disposition for Application Shared for [Position Title], [Pay Plan]-[Series]-[Grade(s)], location with [Receiving Agency Name]

Body Text:

Hello,

## Documentation Reminder

All Required Documentation listed in the next section will need to be uploaded into the Documents area of the Request created within the Receiving Agency's tenant in USA Staffing.

When applying for Announcement [Announcement Number from original JOA], you opted-in to have your application shared with other agencies interested in filling similar positions. Your application was shared with our agency, [Receiving Agency name].

We regret to inform you that you were not selected for the position of [Position Title], [Pay Plan]-[Series]-[Grade(s)], located in [location].

## Creating a Request in USA Staffing

### If the Receiving Agency makes a selection from the Shared Certificate

If a selection was made from the shared certificate, the Receiving Agency can initiate an Onboard New Hire request in their own USA Staffing tenant to manually onboard the selected individual(s). Following the steps outlined in this link for [Creating a Onboard New Hire Request](#).

[https://help.stage.usastaffing.gov/USAS/index.php?title=New\\_Hires\\_Request](https://help.stage.usastaffing.gov/USAS/index.php?title=New_Hires_Request)

Once the request is approved, click the "View New Hire" button, and complete the process according to your agency standards.

### If the Receiving Agency does not make a selection from the Shared Certificate

If the Receiving Agency does not find a viable applicant for selection from the Shared Certificate they will need to initiate a New Vacancy Request in USA Staffing to ensure all required documentation listed below is stored in a central location for audit purposes.

1. Click the Create Request button from the Request Dashboard
2. Fill in all required information on the Request Information tab
3. Upload all required documentation listed in the Required Documentation section of this guide
4. Hit Save, then navigate back to the top of the screen and in the Status drop down select Request Cancelled, with the appropriate reason.

## Update Copied Talent Pool - (*Shared Certificate Coordinator*)

Once a Receiving Agency has completed all the previous actions above, the Shared Certificate Coordinator will need to go back into their copy of the Talent Pool and ensure all the applicant status are updated based on the outcome of the certificate review.

### Required Documentation

#### **Maintain case file documentation of the shared certificate(s)**

It is important that the Receiving Agency retain copies of all required documentation associated with the case, including copies of the certificate of eligibles and actions taken, job analysis, job opportunity announcement, and assessment materials developed by the original agency. After the Applicant List Review is returned to the original agency, you may not be able to access this information in USA Staffing again, so it's important to download a copy prior to returning the Review.

1. Job Analysis
  - a. This information should be included as a document in the Applicant List Review sent by the Original Agency. If they do not include it, you will need to request a copy via email.
    - i. Click Documents menu in Applicant List Review
    - ii. Open Job Analysis file
    - iii. Download a copy to be used in later steps
2. Job Opportunity Announcement
  - a. In the Applicant List Review, click the View Announcement
  - b. When announcement is rendered click the print button and save for later steps
3. Certificate of Eligibles (shared certificate)
  - a. Within Certificate of Eligible, click the print button
  - b. Download a copy to be used in later steps
  - c. Repeat this step for each Certificate of Eligible associated with the Applicant List Review
4. Receiving Agency Position Description
5. Documentation that the CSA requirement to announce internally before using shared certificate was completed
6. Declination and/or Failure to Reply documentation from applicants
7. Export of Talent Pool
  - a. To download the talent pool report:
    - i. Sign into ATP
    - ii. Open the Talent Pool in USAJOBS Agency Talent Portal
    - iii. Open a talent pool you've copied
    - iv. On the right-hand side under next steps, you will see a link to Export Talent

Pool file to (PDF)

To upload into Request

1. Open the request.
2. Click the Documents button.
3. Click Choose File.
4. Select a File.
5. Click Upload.
6. Once the file has been processed, it will be viewable by anyone who has access to the request.

**If you have any additional questions about the shared certificates process that were not addressed in this guide, please contact your USA Staffing Account Manager.**