Referral Training Exercise 4: Auditing a Certificate and Issuing Disposition Letters

Now that you have completed the online portion of training for Referral, it is time to log into the Training environment of USA Staffing to practice what you have learned. Use this step-by-step guide to help you practice this lesson. Retain your notes to assist you with other lessons.

This practice exercise will walk you through auditing a certificate and issuing disposition letters to applicants. Auditing a certificate requires you to have a certificate. If you already have certificate that can be audited, complete the information below. If not, you can access the entire practice training series on the USA Staffing Training Resources page at: https://help.usastaffing.gov/ResourceCenter/index.php/USA_Staffing_Training_Resources. You will then need to complete the Request, Vacancy, Assessment, Announcement, and Referral (Exercises 1-3) exercises before proceeding with this exercise.

My Vacancy Number: ____________________________

1. Go into your **Vacancy Number**. There are several ways to access a Vacancy Number:
   a. If you know your number, you can type it directly in the **Go To** box at the top of the page and click **Enter**.
   b. You can locate your request in the Requests tab of your dashboard. Once in your request, there is a direct access link under the **Vacancy Created** section.
   c. If you have recently gone into this Vacancy Number, it will show up in your dashboard drop-down list

2. Once in your Vacancy, navigate to the **Certificates** tab. If the Certificates tab does not automatically display, use the **+** to select Certificates.

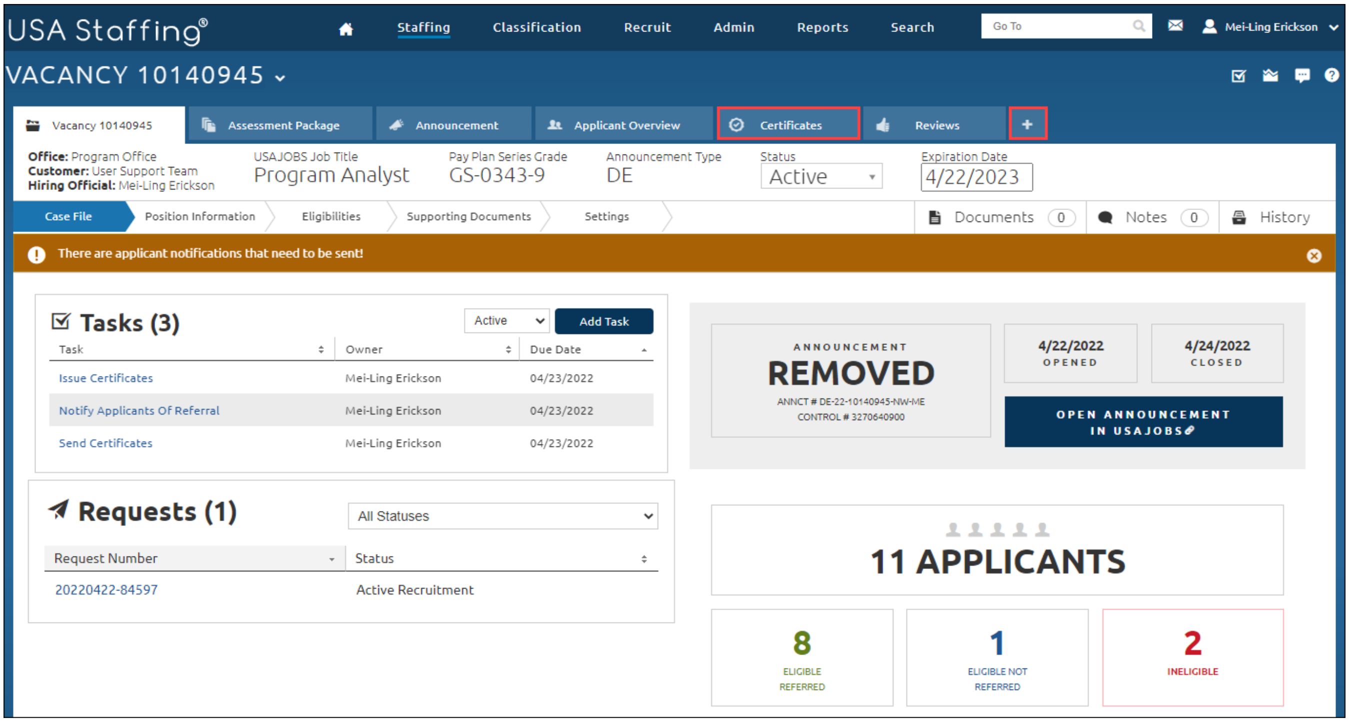

Image 1: Vacancy Case File page with the Certificate and the + tab highlighted. It is located near the top of the page.

3. Click the **Certificate Number** next to the certificate you want to audit.

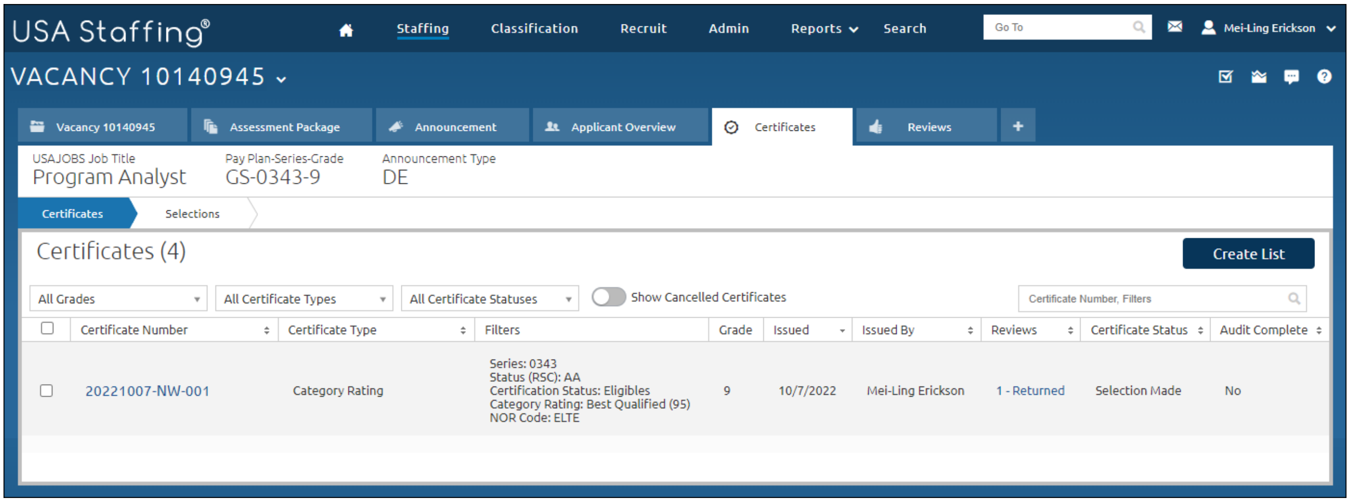

Image 2: Certificates page with a certificate. To access the certificate, click on the Certificate Number.

4. If the certificate was returned from a Hiring Manager, some or all of the **Audit Codes** may be completed. Hiring Managers are not required to complete all **Audit Codes** before returning the certificate to HR.

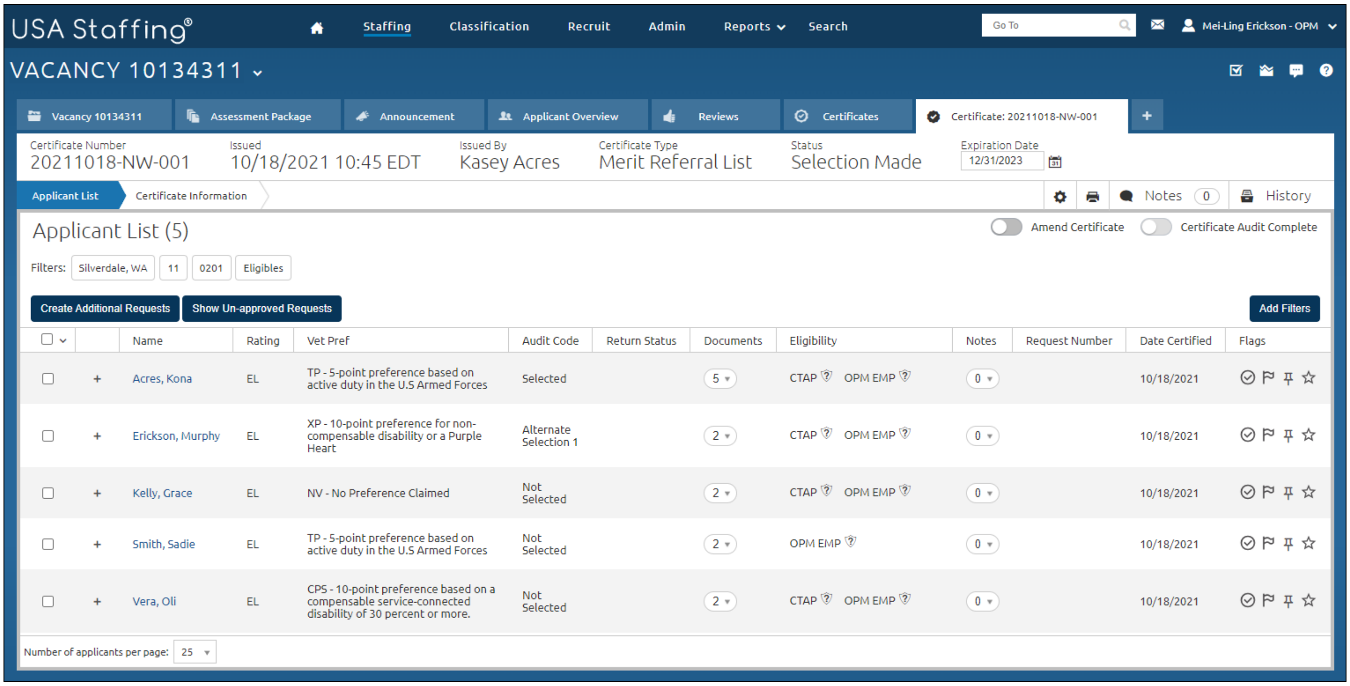

Image 3: A certificate returned from a Hiring Manager. All of the Audit Codes have been filled in but the Return Status column is blank for all applicants.

5. To complete the audit, ensure all applicants on the certificate have an **Audit Code** and **Return Status**.
   a. Designate any not selected applicants as a Return Status of **Available**.

b. Any decline applicants should have their status set based on the conditions of the declination. For example, if the applicant **Declined Location** and the announcement had only 1 location, the applicant should be **Unavailable**. If there were multiple locations, the applicant would be **Available**.
c. Any **Selected** applicants should be marked as **Hired**.

You can assign Audit Codes and Return Status two ways:

a. Click the **Edit** icon ( ) next to a name.
b. Check the box next to the name(s) and use the **Set Return Status** button.

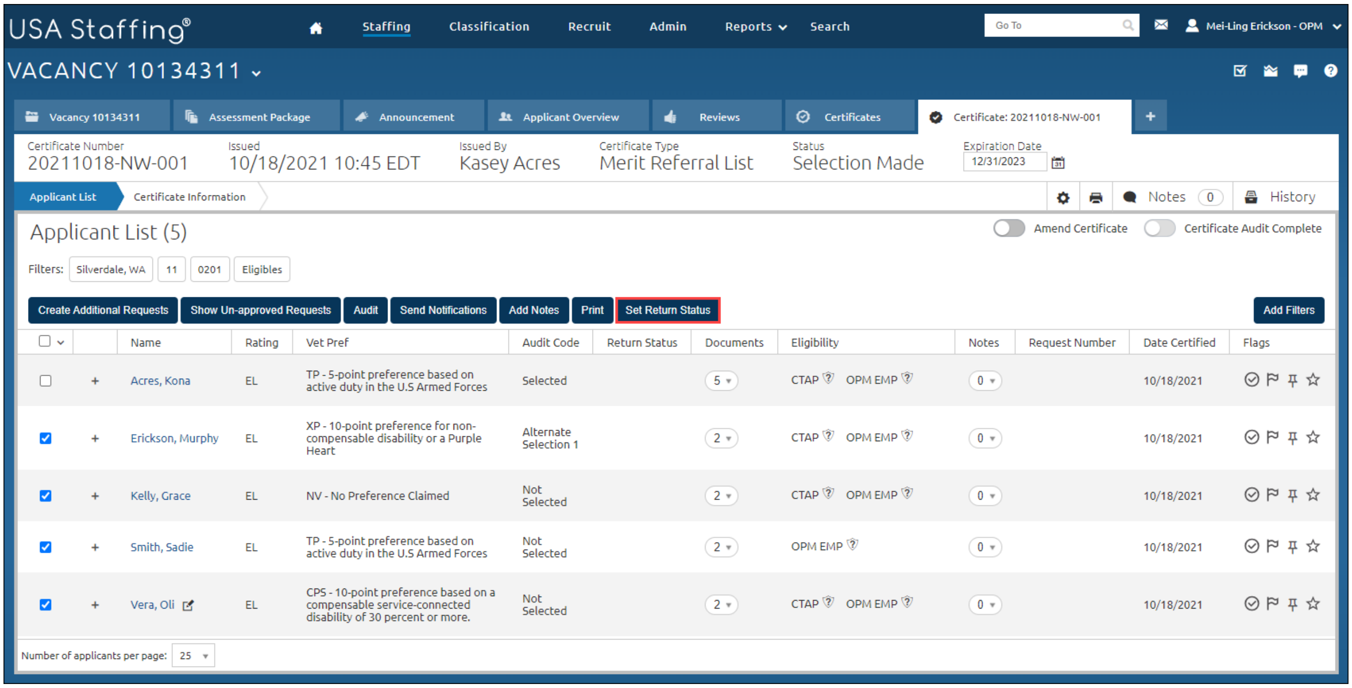

Image 4: Several applicants with the box next to their name checked and the ***Set Return Status*** *highlighted.*

6. Once you complete the audit for any Selected, Hired applicants and designate the Request Number, Location, and other required information for that applicant.
   a. After completing the required fields, select **Save and Close**.

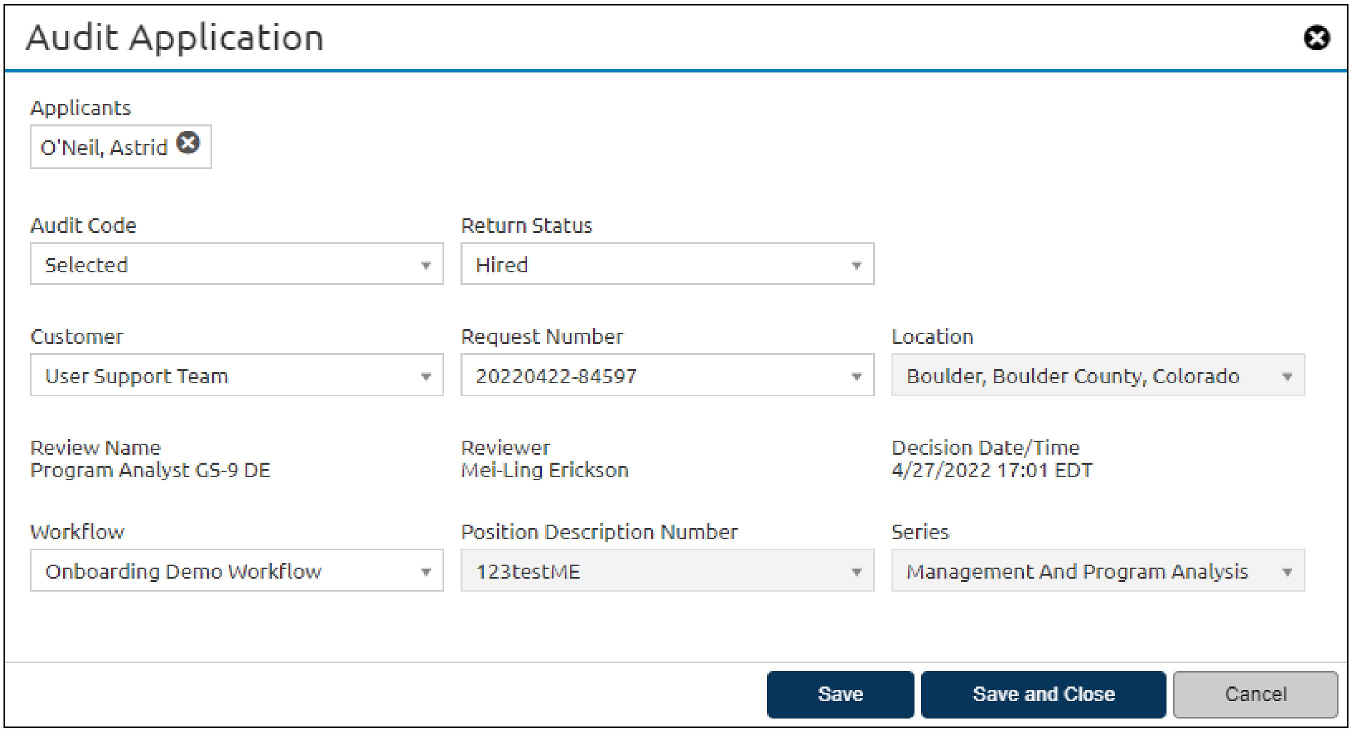

Image 5a: Audit Application pop up for a Selected, Hired applicant.

b. The system will display a **Save Audit Create New Hire Process** pop-up. If you don't see that pop-up, image 5a below, it means you did not complete all fields in the Audit Application screen.

c. A green check-mark will display as the system completes each item.

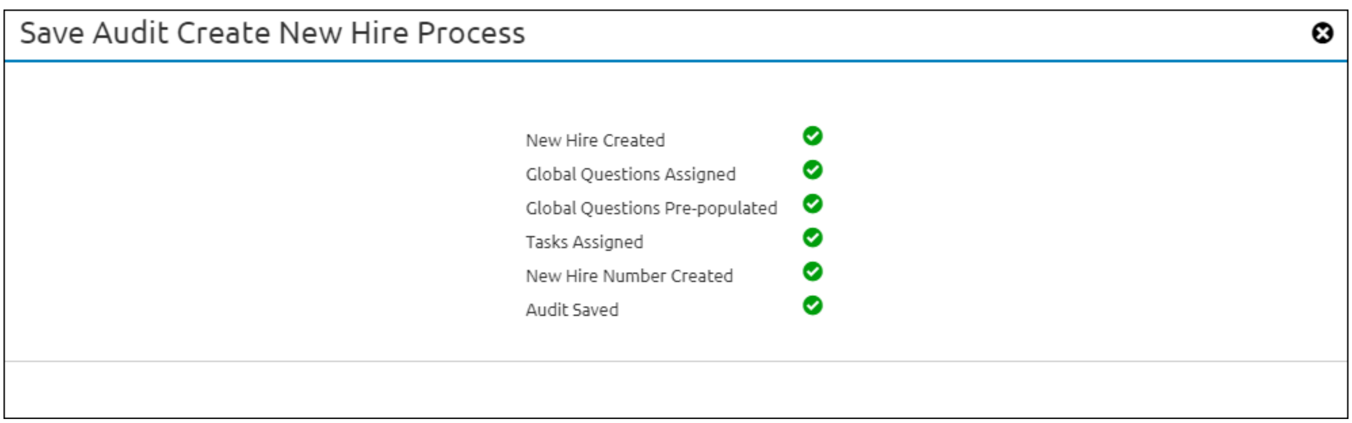

Image 5b: The Save Audit Create New Hire Process box with completed icons for some of the tasks.

7. Once all applicants have an Audit Code and Return Status, the system will ask you if you want to toggle the Certificate Audit Complete button. Completing the audit will lock the certificate so you won't be able to add or remove any applicants from the certificate. Click on the **Complete Audit** button.

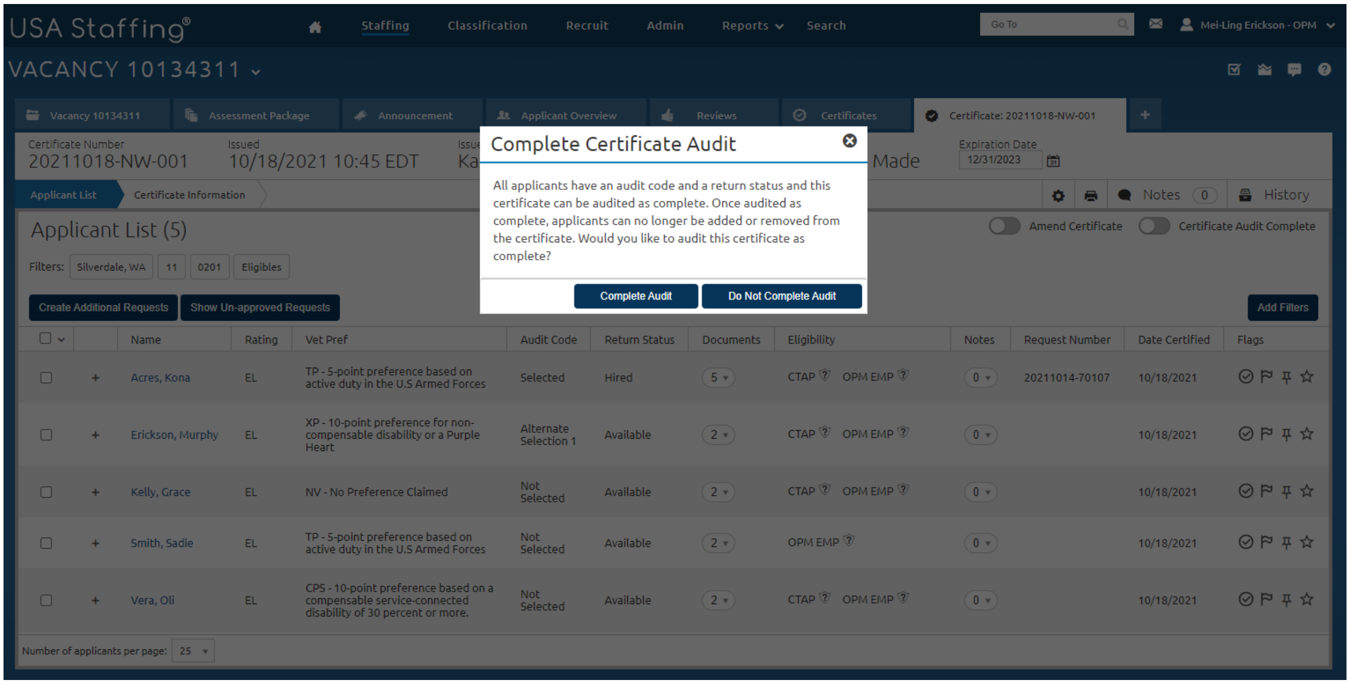

Image 6: The Complete Audit/ Do Not Complete Audit box.

8. You will return to the certificate and the **Certificate Audit Complete** toggle will be selected. If you need to make a change to any audit codes, you will need to un-toggle the **Certificate Audit Complete** first.

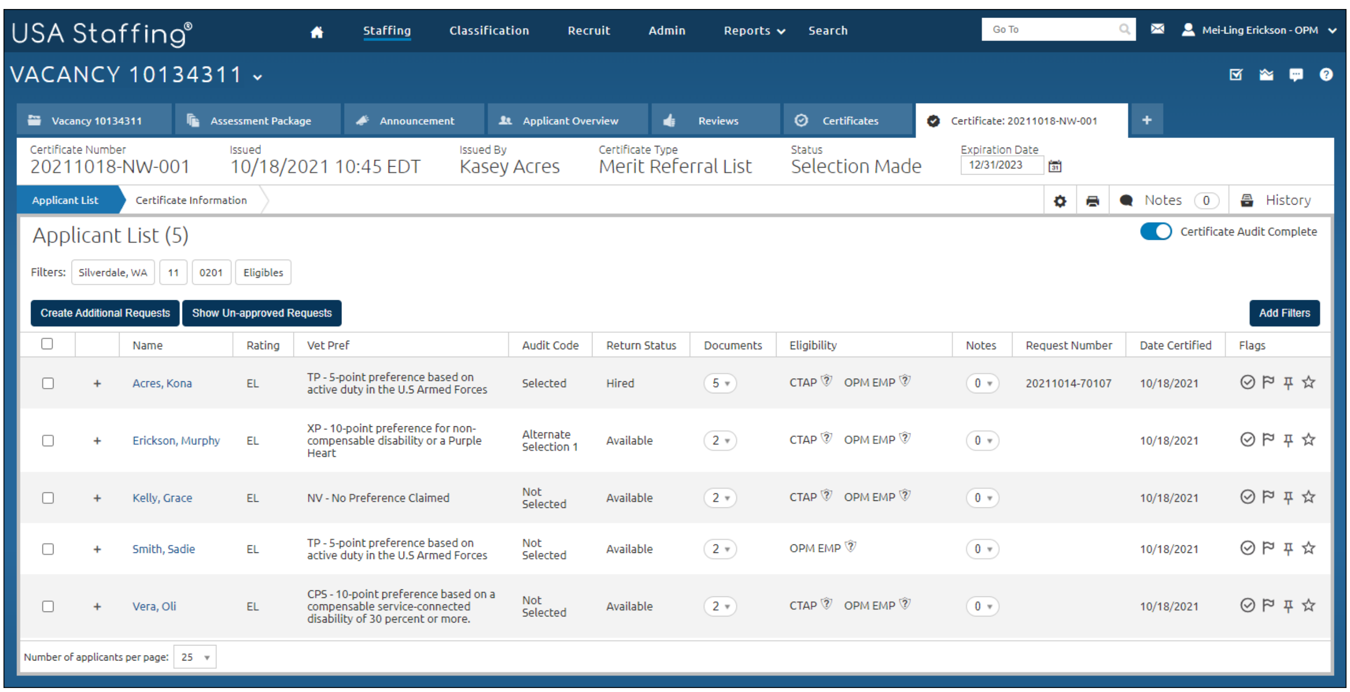

Image 7: A certificate with all Audit Codes and Return Status (codes) completed. The Certificate Audit Complete is checked. The Certificate Audit Complete toggle is located in the upper-right quadrant of the screen.

Your certificate has now been successfully audited.

9. To issue Disposition Letters, return to the **Applicant Overview** tab. Press the **Send Remaining** button in the Final Disposition section.

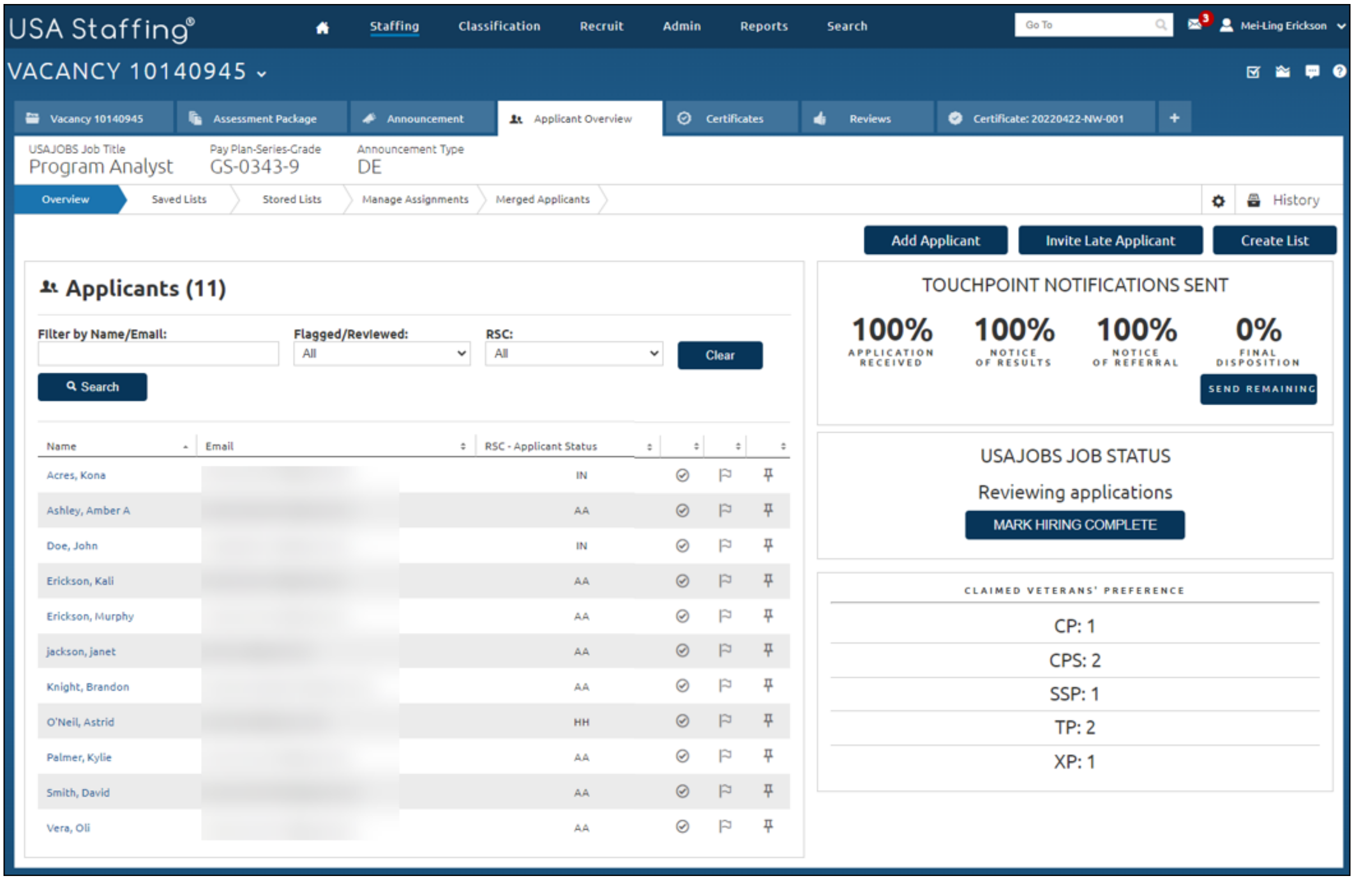

Image 8: Applicant Overview page with the Send Remaining button highlighted for the Final Disposition notifications. The Touchpoint Notifications show 0% for Final Disposition. This button is located on the middle, right side of the page.

10. The Choose Notification Template pop-up will display a list of all Notification templates for that touchpoint. In this scenario the type is defaulted to Disposition since we selected **Send Remaining** from Final Disposition. If you do not have any options or the options that you have are not what you need, you will need someone with adequate permissions in Training to create a template. For detailed instructions for creating a notification template see: https://help.usastaffing.gov/USAS/index.php?title=Creating_a_notification_template. Remember, when creating a notification template the Notification Type will control which touchpoint the template is associated with.

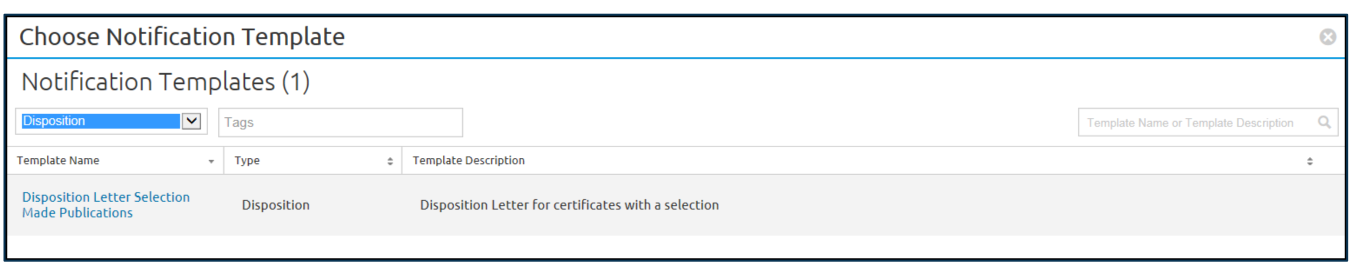

Image 9: The Choose Notification Template page with the notification type of Disposition selected.

11. Select the template you want to use by clicking on the **Template Name**.

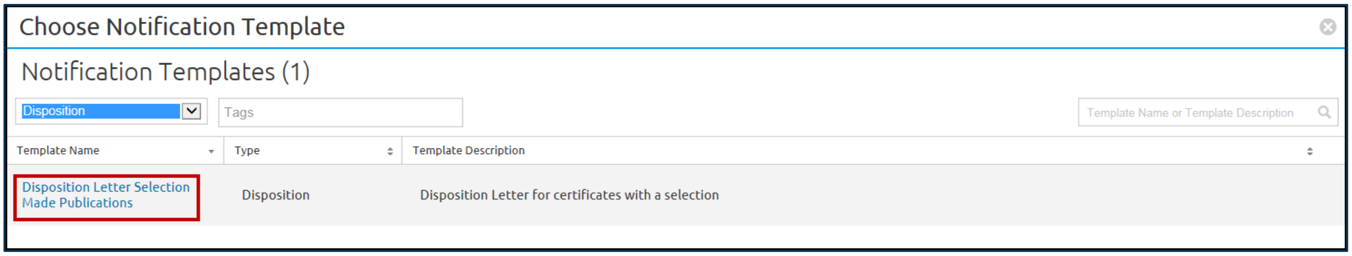

Image 10: Choose Notification Template page with the Template Name highlighted. Clicking on the name of the template selects that template.

12. The Preview Notification page will display a preview of the notifications. You can use the navigation buttons on the lower-right side of the screen to navigate to applicant previews.

Note: If the text of the notifications is not correct or not what you want to send, you, or someone with sufficient permissions in the Training environment, can modify the text of the templates in Admin. Here are instructions: https://help.usastaffing.gov/USAS/index.php?title=Editing_a_notification_template

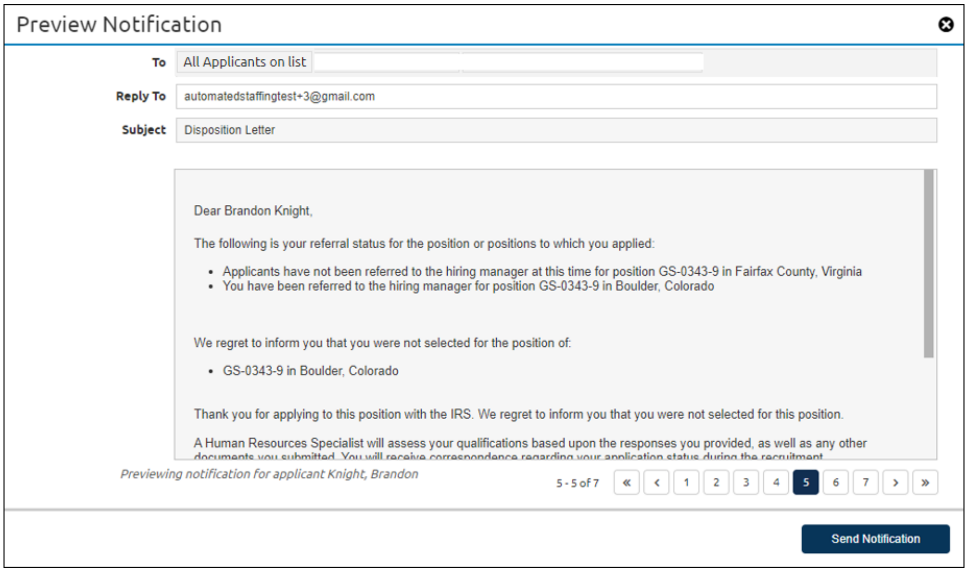

Image 11: Sample Preview Notification page for Disposition Letters.

13. When ready, click the **Send Notification** button.

Important Note: Before sending the notifications make sure that all e-mail addresses in your applicant list are appropriate to send notifications to. The system will send the notification letter when you press the **Send Notification** button with any text in it. You will not be able to recall these messages. It would not be appropriate to send letters to any real applicants or agency employees not involved in testing this site. Make sure any e-mail addresses that receive a notice are aware that this is for practice only. If in doubt, skip this step. You will still understand how this process works by setting it up to this point.

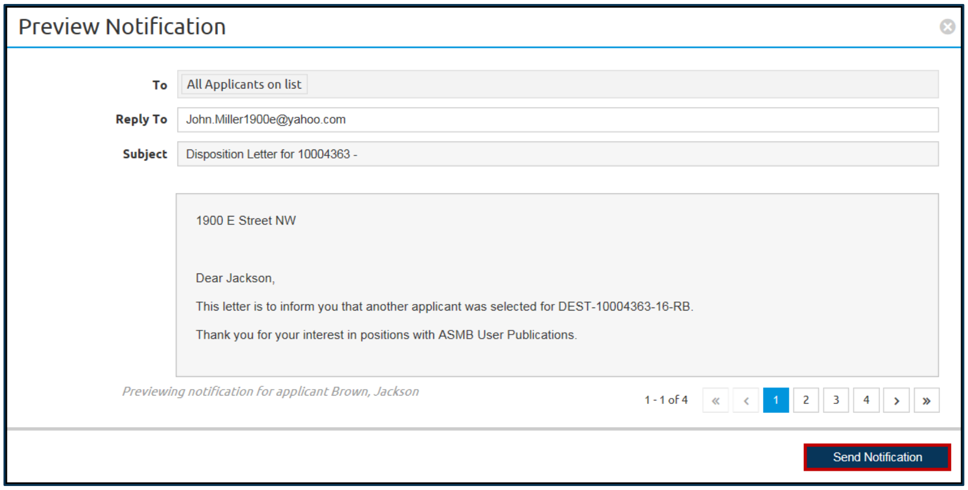

Image 12: Preview Notification page with Send Notification button highlighted.

14. Now that the Disposition Letters have been sent, the Touchpoint Notifications Sent has updated to 100%.

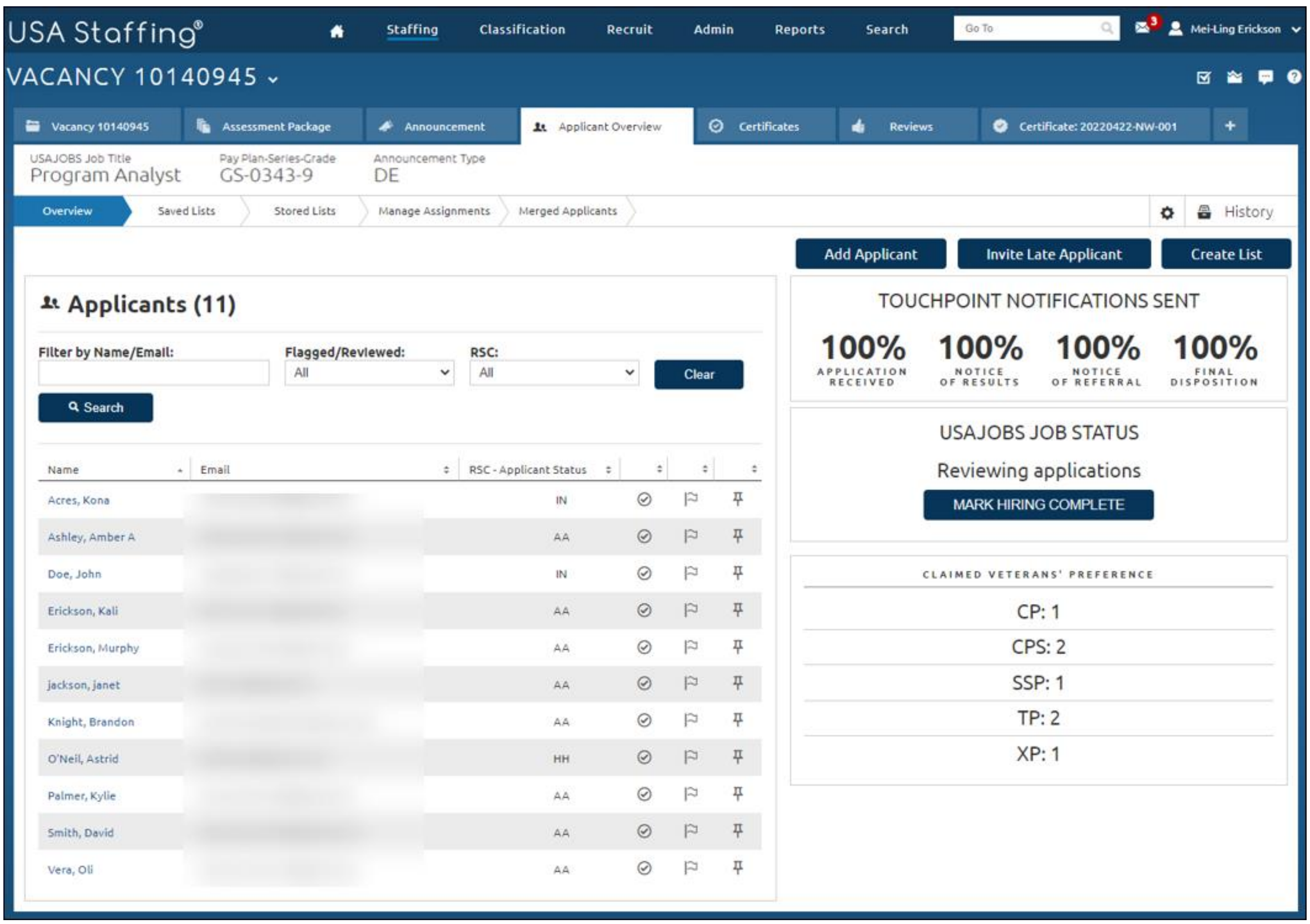

Image 13: Applicant Overview page with 100% for the Final Disposition touchpoint notification.

This completes this lesson. Your vacancy is now complete!

If at any time, in the site, you have questions:

Click the help icon in the upper corner to launch online help. It will open in a separate tab.

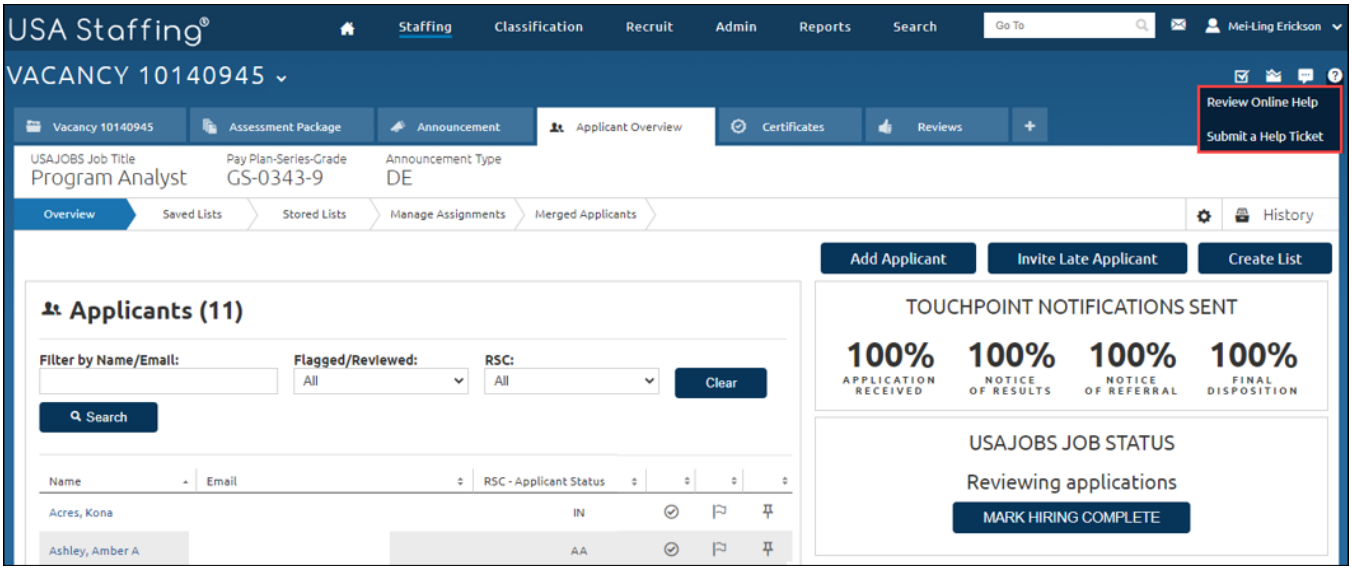

Image 14: Applicant Overview page with the help icon expanded. The two options listed are Review Online Help and Submit a Help Ticket. This is located in the upper-right quadrant of the page.

If you need additional help, click the **Home** button on online help. Then select **Help for USA Staffing HR Users**.

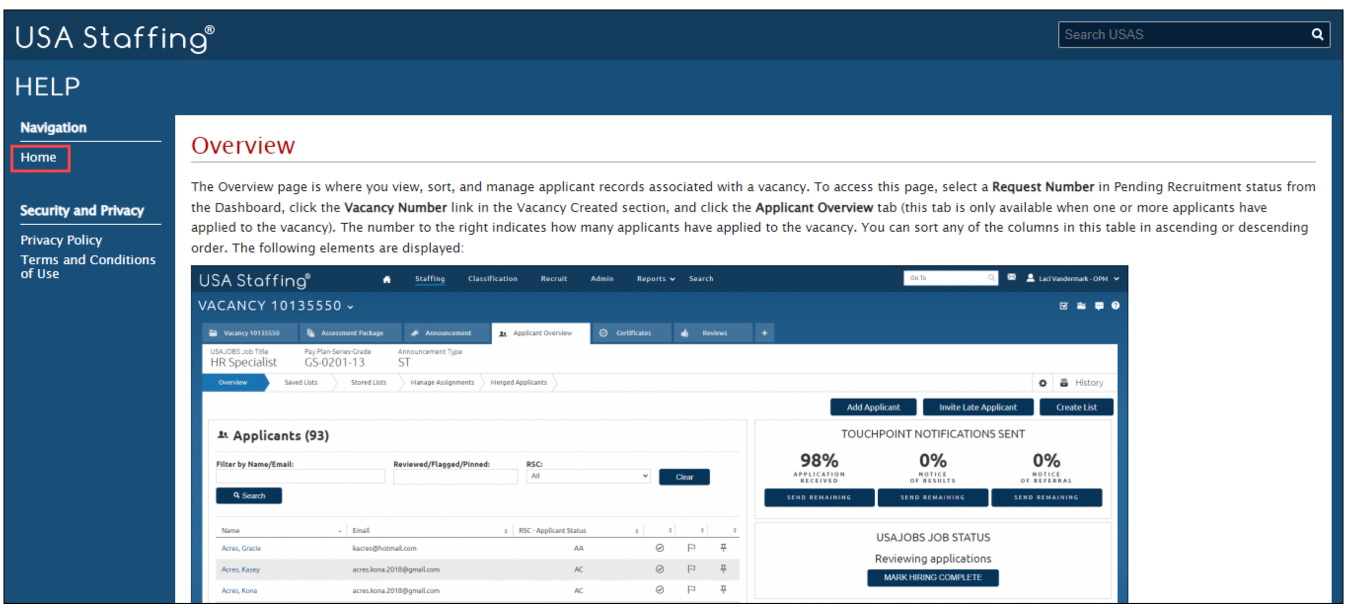

Image 15: Applicant Overview page of Online Help. The Home button is highlighted. Home is located in the upper-left quadrant of the page.