



USA Staffing®
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USA Staffing Upgrade

HR Users Guide to Hiring Manager User Collaboration



OPM HR SOLUTIONS
by government, for government

U.S. Office of Personnel Management
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Introduction

This document provides an overview of how USA Staffing HR Users can collaborate with their Hiring Managers or other SMEs on how to effectively use the USA Staffing Upgrade system. Also included are system specific frequently asked questions an HR User may expect to hear, as well as best practices and a sample checklist to use when providing guidance on the use of the system.

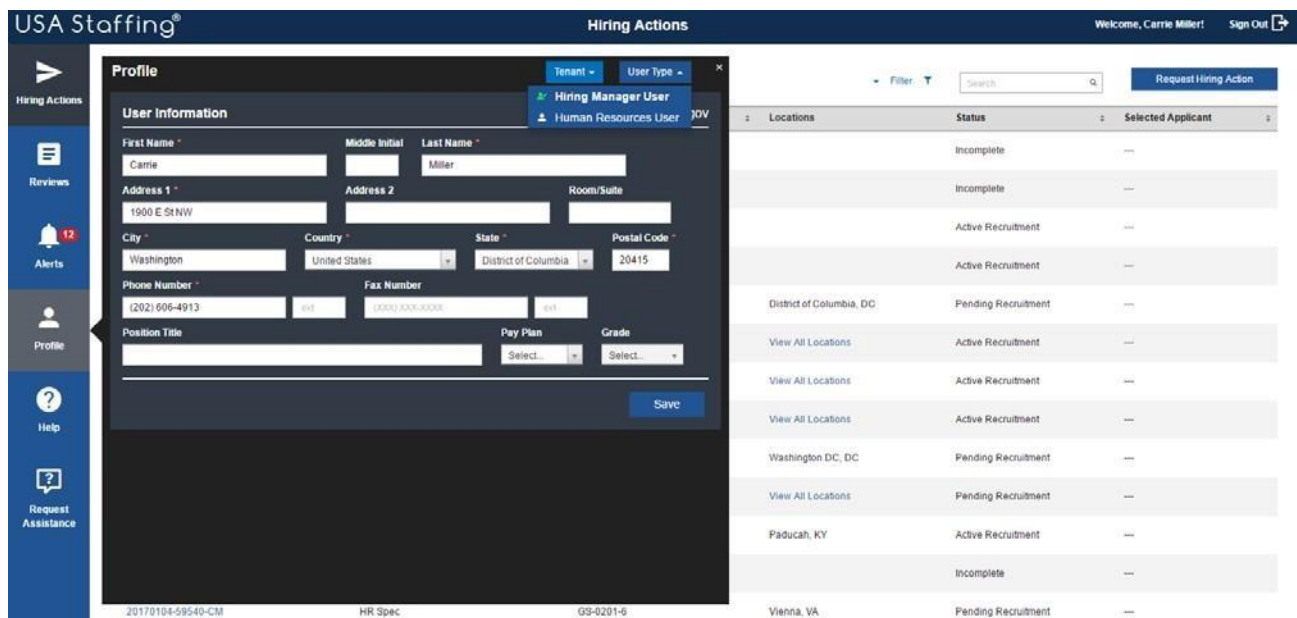
The USA Staffing system allows HR Users to connect and share information with Hiring Manager Users who need to provide feedback on work within USA Staffing. Through this interface, HR and Hiring Manager Users are able to share notes, review assessment and announcement information, review applicant documents, and collaborate on certificates/new hires all within one system. Use of the system can vary by Agency and can be adapted to meet the needs of your Agency and comply with your internal business processes.

Best Practices

It is recommended that Agencies develop an internal business process that outlines how to orient Hiring Manager (HM) Users to the USA Staffing system. For example, a session can be added to any required New Supervisor training curriculum and/or an orientation to the system can be accomplished on an as-needed basis when each HM User is ready

to submit their first request or complete their first review within the system. Regardless of how your Agency decides to do this, the following best practices will assist the HM User in understanding how to navigate and work in USA Staffing.

- ✦ Develop guides on Agency-specific business processes HM Users should follow the processes for the submission of requests and the completion of reviews.
- ✦ Create HM User accounts on an as-needed basis; if given access to the system too early, it may cause unnecessary confusion or rework.
- ✦ Learn how the system works from the perspective of a HM User:
 - Ask your Office Administrator to assign HM User access to your profile in the USA Staffing Upgrade Stage environment.
 - Test your Agency's internal processes while in the USA Staffing Upgrade Stage environment by accessing the system as an HR User and assign yourself reviews for assessments, announcements and applicant lists. Then access the system as an HM User and create new requests, respond to your review tasks, etc. To switch between the HR User and HM User Types, access your profile within the navigation pane on the left side of the screen. Type "Select User Type" at the top right corner of the Profile Window, and select the Hiring Manager User or Human Resources User type as appropriate.



- ✦ Communicate key features and benefits of the Hiring Manager interface with HM Users such as:
 - Ability to sign in using a PIV enabled smart card.
 - Option to create a recruitment request and send it directly to the HR Office.
 - Capability to share notes between HR and HM Users.
 - Review assessment and announcement information and identify changes in the system that the HR User should make prior to release to USAJOBS, reducing the need for multiple email correspondence.
 - Review applicant documents, identify applicants to be interviewed, make selection decisions, and more all within one system.
- ✦ Spend time reviewing the system with HM Users either in person or virtually, especially first time users. Refer to the Checklist in [Appendix A](#) when providing a review of the system.

- ✦ Review the [resources available for HM Users](#) and encourage their completion of the Online Training Module and use of Online Help.
- ✦ Familiarize yourself with some of the [commons questions](#) you may routinely receive from Hiring Manager Users.

Common Questions

Being aware of commons questions you may receive will ensure you are prepared the next time you engage with a HM User. Sample questions you may expect to receive and general answers are broken down into the categories listed below:

System Access

1. How can I gain access to the system?
 - a. The HR Office will create a USA Staffing account for all Hiring Manager Users. Once an account is created, an email with instructions on activating the account will be sent to the email address tied to the account. Click on the link in the body of the email and follow the on-screen prompts to create a password. The first time logging in, all Users must accept the system's Rules of Behavior in order to access the system.
2. What are the password requirements?
 - a. Must be at least 12 characters;
Must not contain spaces;
Must not contain invalid special characters;
Must match Confirm Password;
Must not contain any four consecutive characters from your email address or your full name; Must include three of the following four attributes: Upper case: A-Z
Lower case: a-z Numbers:
0-9
Special characters: #@\$%&*+=?:(){}[]" 3. Can I create USA Staffing accounts for other Hiring Managers?
 - a. No, only the HR Office can create accounts for Hiring Manager Users. If you want additional people to have access to the system, please contact the HR Office for assistance.

General Reviews

1. How can I share a review with other Hiring Managers?
 - a. Only the HR Office can share a review with other Hiring Manager Users within USA Staffing. If you want to share the review with others in the system, please contact the HR Office for assistance. You may share the information presented in a review outside of the USA Staffing system by copying and pasting the draft assessment and/or announcement into Microsoft Word. For applicant list reviews, you can save and/or print a PDF version of the certificate and share it with others outside of the USA Staffing system.
2. Who determines how much time I have to complete a review and return it to the HR Office?
 - a. The HR Specialist determines the due date.
3. What happens if I do not complete my review by the due date?

- a. You must consult with your HR Office to determine next steps. They may allow you an extension to complete the review or continue on with the recruitment process without the reviewing being completed.

Assessment/Announcement Reviews

1. How do I view and make edits in Microsoft Word for the draft assessment and/or announcement that are sent to me through a review in USA Staffing?
 - a. We recommend making all edits within the review sent to you in USA Staffing. This will allow tracking to be completed and creates a more seamless, automated process. However, there are a few options if you want to make edits in Microsoft Word. These include (1) you can copy and paste the draft found in USA Staffing to Microsoft Word and continue to make your edits; or, (2) you can request a Microsoft Word version of the drafts from the HR Office.
2. Can multiple Hiring Manager Users who are sent the same assessment and/or announcement review make their own distinct edits and return them separately to the HR Office within USA Staffing?
 - a. Yes, the edits from different Hiring Manager Users will appear in different colors and when you hover your cursor over them you will be able to see who made the edit. However, if a Hiring Manager User tries to return their edits to the HR Office, they will see a warning message indicating a return to HR will remove access for all others who are assigned to that review. You may want to designate a main reviewer to ensure only the main reviewer returns the final review to the HR Office.
3. I am an HR Liaison, how can I save the draft assessment and/or announcement in Microsoft Word in order to forward to the Hiring Manager for review?
 - a. There are a few options, including (1) copy and paste the draft found in USA Staffing to Microsoft Word and forward it to the Hiring Manager; or, (2) request a Microsoft Word version of the draft from the HR Office and forward it to the Hiring Manager.
4. How do I review a draft assessment and/or announcement in USA Staffing and 'return' it with the edits to the HR Office?
 - a. When all assignments in the My Assignments list of the Review have a green check mark next to them, and if your permissions allow, click the Return to HR button to return the review. If you do not see this box, you are finished when the all Review statuses are complete.
5. If a review is sent to multiple Hiring Manager Users, and one Hiring Manager User completes their review and returns it to the HR Office, how does that affect others who are still in the process of completing their review?
 - a. If multiple Hiring Manager Users are assigned to a review and one person tries to return their edits to the HR Office, they will see a warning message indicating a return to HR will remove access for all others who are assigned to that review. To mitigate this issue, it is important to develop an internal business process when you allow the HR Office to assign a review to multiple Hiring Manager Users. **Applicant List Reviews**
2. How do I print a certificate?
 - a. Within the applicant list review, open the certificate tab and click the **Print** button to generate the Certificate Overview Report which is a printable PDF version of the certificate. Additionally, there is a page on Online Help that speaks to [generating a printable PDF version of a certificate](#).

3. How do I return an applicant list review in USA Staffing?
 - a. When all assignments in the My Assignments list of the Review have a green check mark next to them, and if your permissions allow, click the Return to HR button to return the review. If you do not see this box, you are finished when the all Review statuses are complete.
4. How do I view each applicant's supporting documents?
 - a. Within the applicant list review, open the certificate tab to view the actual list of applicants who have been referred for selection consideration. From the Documents column, click the number identified which indicates the number of documents that are available for viewing. You can then select the document you wish to view. Additionally, there is a page on Online Help that speaks to [viewing an applicant's supporting documents](#).
5. When making my selections, who adds the action codes on the candidates' records within USA Staffing?
 - a. You must consult with your HR Office to determine the internal processes for this task. If you are required to assign the appropriate decision codes, in order to document your selection decision, you must click the value in the Selection Decision column of the applicant for which you want to assign an appropriate code. You will then select the appropriate option from the Decision Code drop-down list. If known, also select the appropriate option from the Request Number drop-down list. Additionally, there is a page on Online Help that speaks to [documenting the selection decision for multiple applicants with the same decision code](#).
6. Do all Hiring Manager Users have access to the same supporting documents applicants submit?
 - a. Yes, all Hiring Manager Users have access to the same applicant documents.

Resources for Hiring Manager Users

1. Hiring Manager Quick Reference Guide found on the [USA Staffing Resource Center](#).
2. To troubleshoot issues with system functionality, access the [Online help for Hiring Manager's](#). Online help is also accessible directly within the system by clicking on the Question Mark icon.
3. For technical issues and questions, submit a Help Desk Ticket to the OPM USA Staffing Program Office when in USA Staffing by clicking the Request Assistance link on the left edge of the USA Staffing window. Although it may seem like better customer service to submit a help desk ticket for the Hiring Manager User, it is more beneficial for the Hiring Manager User to submit the ticket themselves. The ticket will populate their information and will collect information about their session behind the scenes which will in turn help identify and solve issue.
4. Coming in the future will be a webinar for Hiring Manager Users. Contact your USA Staffing Account Manager for additional information on how to access the webinar.

Appendix A

It is important to spend time reviewing the system with Hiring Manager Users, especially if it is their first time working in the system. This checklist is designed to assist you in conducting this review and ensuring the HM User has a thorough understanding of how the system works.

	Task
	<p>Share all internal processes your Agency has developed with regard to how HM Users should operate within USA Staffing, for example:</p> <ul style="list-style-type: none"> • Submitting a request – whether this should be accomplished through an interconnected system, by the HM user themselves, by another POC (such as an HR liaison), or someone in the HR Office <ul style="list-style-type: none"> • Permission profile assigned to a specific HM User • Timelines the HM User must comply with in regards to reviews and what happens when they do not submit a review by the assigned due date
	<p>Utilize the USA Staffing Stage Environment to do a short demo on the key features of the system :</p> <ul style="list-style-type: none"> • Sign-in using a PIV enabled smart card • If applicable, create a recruitment request and send it directly to the HR Office • Access and complete an assessment and announcement review including making edits to any drafts <ul style="list-style-type: none"> • Access and complete an applicant list review including: <ul style="list-style-type: none"> ○ Add notes to individual applicants and to multiple applicants <ul style="list-style-type: none"> ○ Review applicant supporting documents and how to print applicant documents in a single PDF ○ Review applicant questionnaire responses <ul style="list-style-type: none"> ○ Utilize the toggle icons for “reviewed” and “to follow-up” ○ Make selection decisions • Return a review to HR
	<p>Review all Resources available to the HM Users:</p> <ul style="list-style-type: none"> • Once created and available, encourage their review of the webinar for Hiring Manager Users • Show them how to access the Online help for Hiring Manager's both when logged in and out of USA Staffing (i.e., clicking the Question Mark icon when logged in) <ul style="list-style-type: none"> ○ Walk through all of the topics covered in Online help • Show them how to access the Hiring Manager Quick Reference Guide from both the USA Staffing Resource Center and in Online help for Hiring Manager's • Explain when it may be appropriate to submit a Help Desk Ticket <ul style="list-style-type: none"> ○ Show them how to submit a Help Desk Ticket by clicking the Question Mark icon