Referral Training Exercise 2: Issuing a Certificate

Now that you have completed the online portion of training for Referral, it is time to log into the Stage 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 issuing a certificate and sending applicant notifications. Issuing a certificate requires you to have a vacancy that has applicants. If you already have vacancy that is ready to review applicants and issue a certificate, 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 Application (or Key Entering an Applicant) exercises before proceeding with this exercise.

My Request Number: _____

My Vacancy Number: _____

If possible, you may want to work with others in your office to get additional applicants added to your vacancy. We suggest having 6-10 eligible applicants in your practice vacancy before proceeding with this lesson. If you need to add some applicants without creating a USAJOBS account for each, you can download **Applicant/Referral: Exercise 1** from the USA Staffing Training Resources page.

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. If you have recently gone into this Vacancy Number it will show up in your dashboard drop-down list.

Once in your Vacancy, navigate to the Applicant Overview tab. If the Applicant Overview tab does not automatically display, use the + to select Applicant Overview.
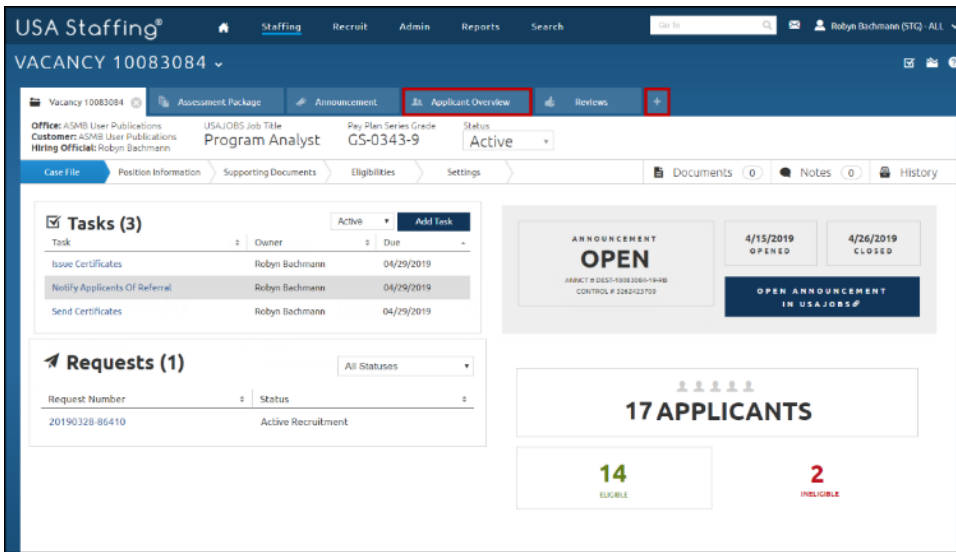
Image 1: Vacancy Case File page with the Applicant Overview and + tabs highlighted.

2. Check for merge applicants. Merge applicants will have a **Resolve Now** button next to the applicant name on the Applicant Overview page. If your vacancy has any applicants marked as merged applicants, click the **Resolve Now** button to resolve the potential merged records. If not, continue to step 3. For additional information see online help at: https://help.usastaffing.gov/USAS/index.php?title=Resolving_potential_applicant_matches .

Note: Since this is a test scenario, if you have merge applicants we recommend selecting the **Consider as Separate Records** button at the bottom of the page in order to keep as many test records as possible for your certificate.
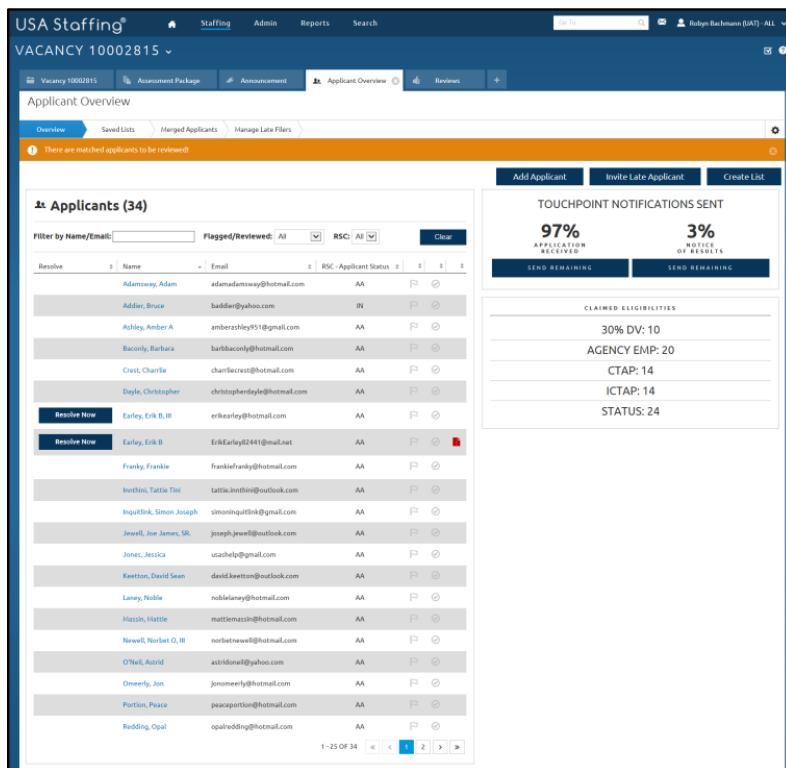
Image 2: Sample Applicant Overview page with merge applicants. The records that need resolution have a Resolve Now button to the left of the applicant name.

3. From Applicant Overview click the **Create List** button.

Image 3: Applicant Overview page. The Create List button is located in the upper-right quadrant of the page.

4. Your applicant List will open in a new tab.

Image 4: Applicant List as it first appears when you arrive on the page.

5. Select a **Certificate Type** from the drop-down list. (The page will refresh with filter options.)
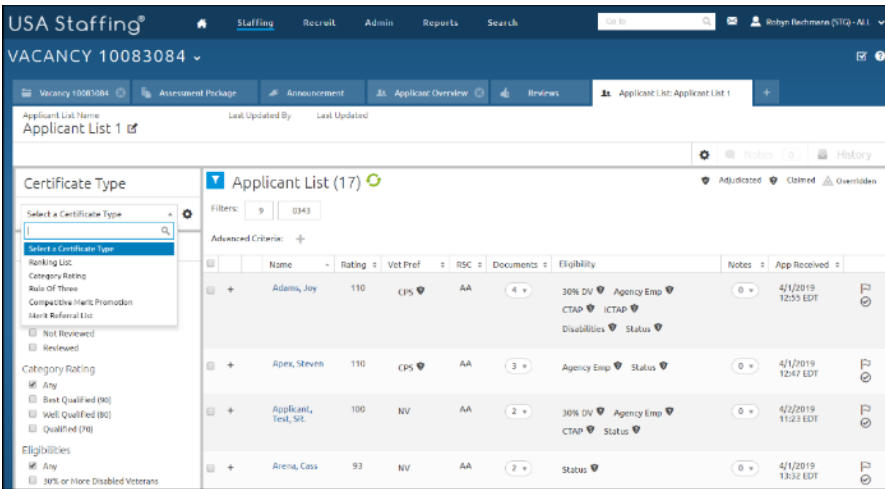
Image 5: Applicant List with the Certificate Type option expanded.

6. Select the Rating Criteria and Filters appropriate to your certificate. You may want to check with your agency to see if they have any established procedures for **Certificate Types** in your organization.
   a. Make sure to include a **CTAP/ICTAP Well Qualified Score** if your list is Category Rating.
   b. If your announcement had multiple locations, select only one from the filters.
   c. Other filters vary based on your announcement.
   d. If desired, try to add an Advanced Criteria by clicking on the + next to Advanced Criteria.

Note that as you select options your list of Applicants automatically refreshes. Once you have your filters applied, give your list a name by clicking the **Save List** button at the bottom of the page or the **Edit** icon next to the name at the top.
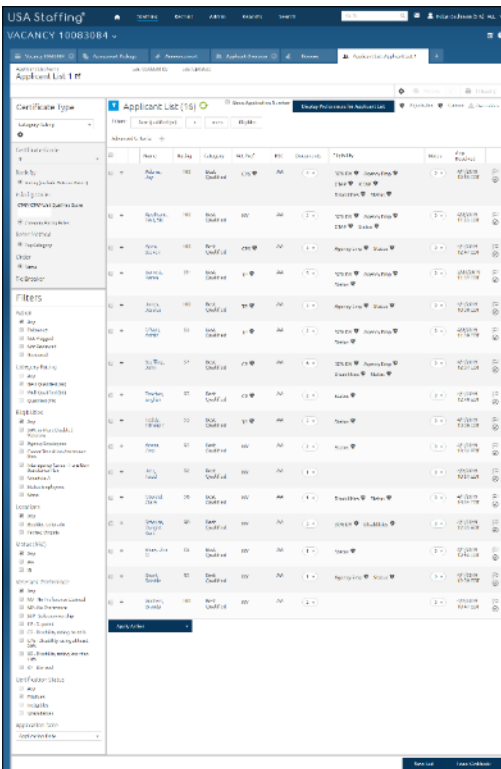
Image 6: Applicant List with filters applied as specified in the instructions above.

7. Next, review your applicants. Begin by reviewing an applicant's documents.
   a. Click on the number in the Documents column to view the documents.
   b. Click on the **Document Name** to open that document.
   c. Click on the number of documents again to close the Documents box.

Note: Since you are working in a test site, not all applicants may have associated documents. Key entered applicants may not have loaded documents.

Image 7: Applicant List with an applicant's document area expanded. The applicant has several documents.

8. Click the + next to an applicant to open the Rating, Assessment, and Certificates tabs for an applicant.

Image 8: Applicant List with an applicant record expanded to show his Rating, Assessment, and Certificates tabs. The tabs appear below the applicant's name.

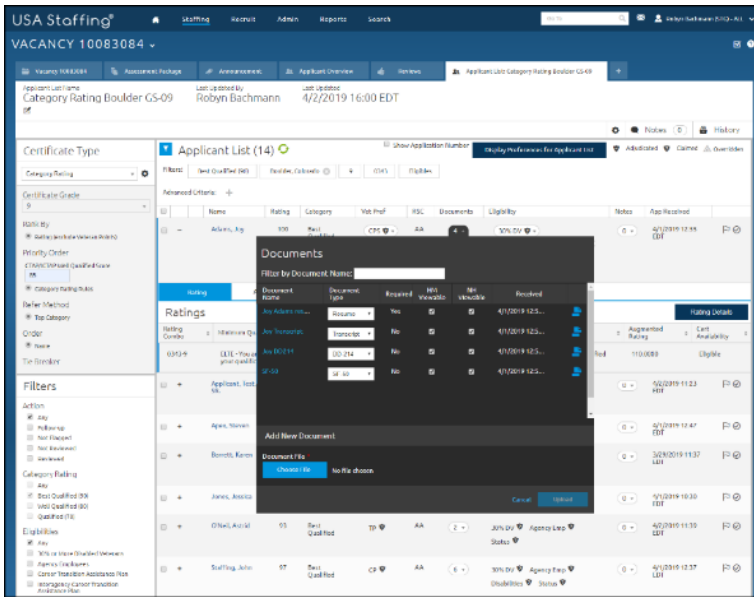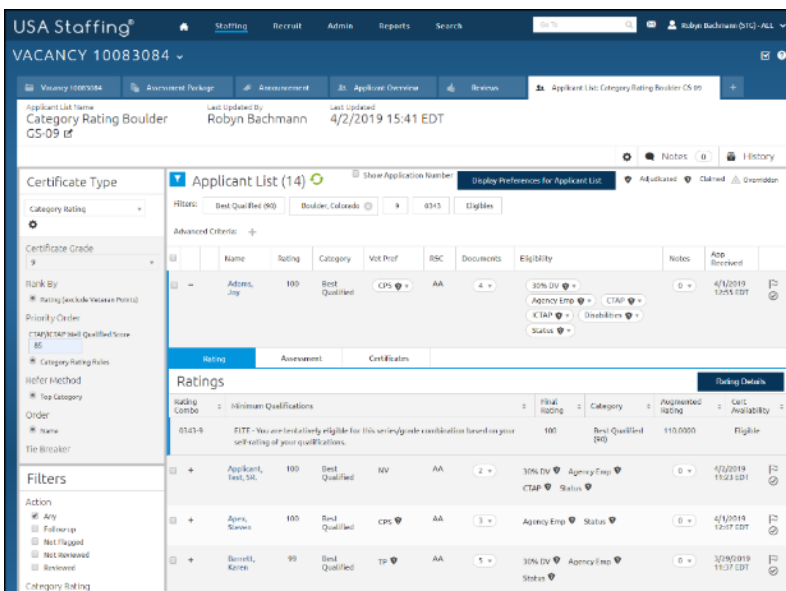9. Verify Eligibilities for the applicants by clicking the drop-down list next to each claimed eligibility and selecting Eligible or Ineligible. If you select Eligible, the ? icon on the shield will change to a check-mark. If you select Ineligible, the Eligibility will be removed from this page. To re-add the eligibility, click the + to the right.

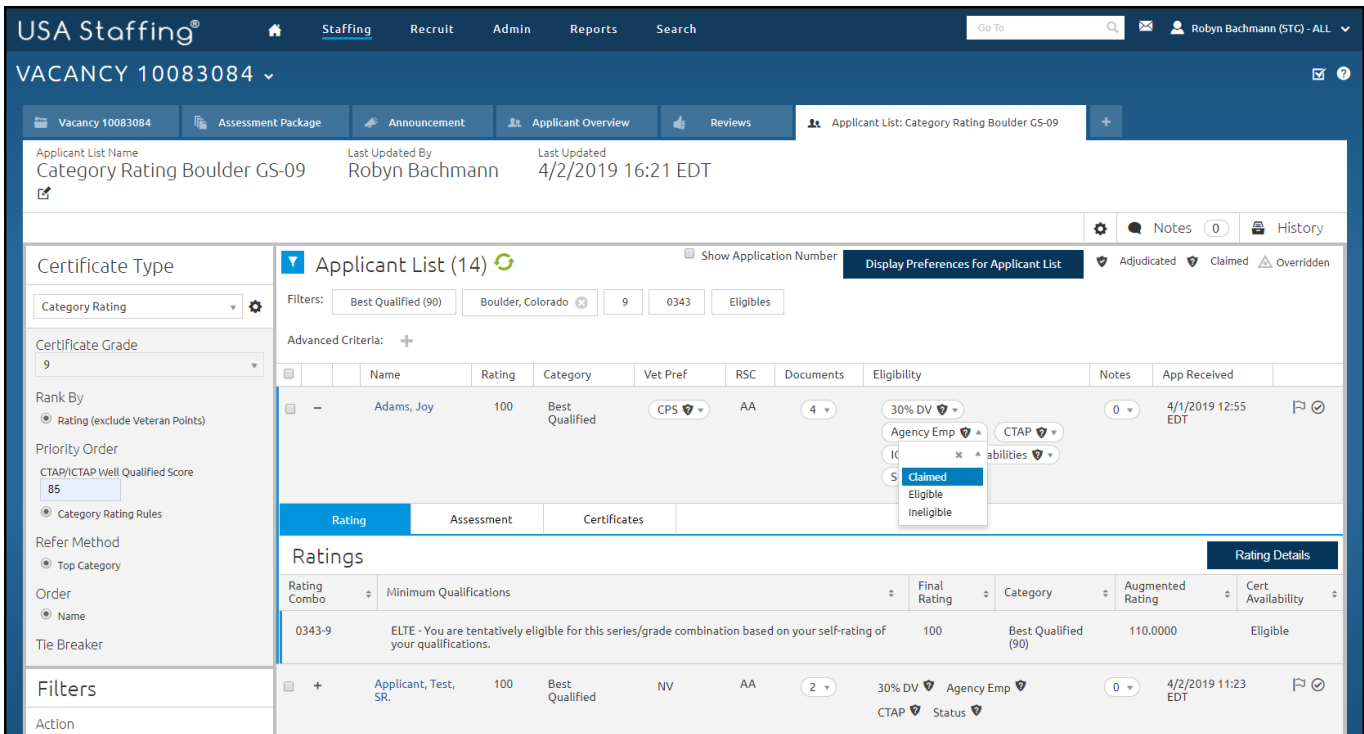*Image 9: Applicant List with an applicant's Eligibility being adjudicated as explained above.*

10. Mark an applicant as ineligible.
    a. Click the + next to an applicant record.
    b. Click the Rating Details button.
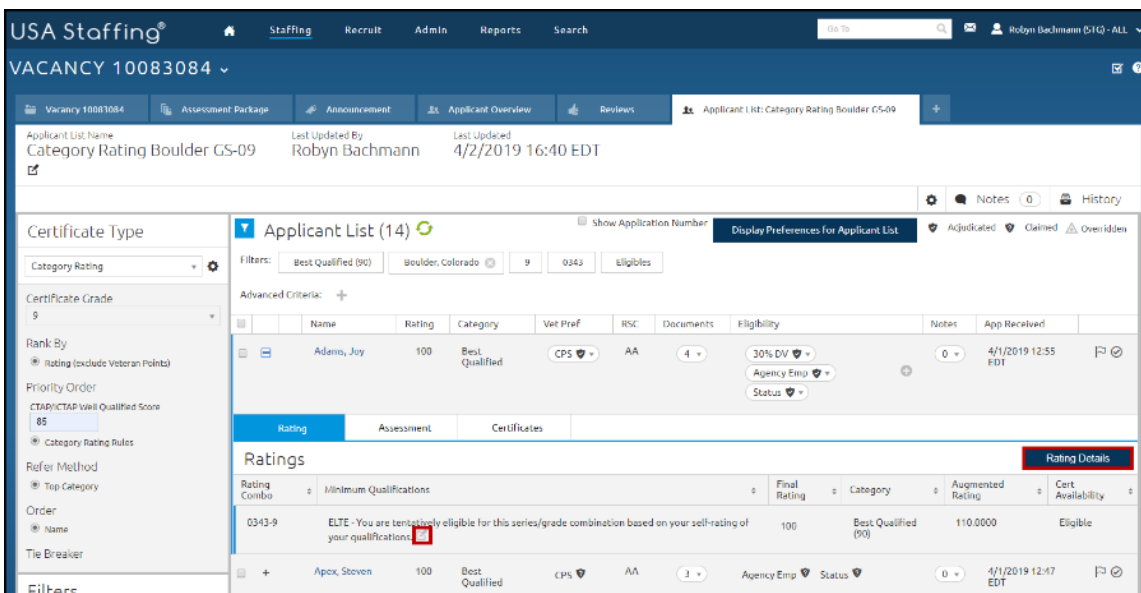
Image 10: Applicant List with the Edit icon highlighted for an applicant. The Edit icon is located on the Ratings tab next to the Minimum Qualifications.

c. On the Rating Details page, use the Minimum Qualification drop-down to change the applicant from ELTE (eligible) to the ineligible code, IQID. Ineligible codes begin with the letter "I".

Image 10b: Rating Details page.

d. **Save and Close** when done.

11. Once you have finished reviewing your applicants and making changes, **Refresh** your list by clicking on the green circle icon at the top of the page. Note that the applicant you previously rated IQID is now removed from the list.

Image 11: The Applicant List. The Refresh button is located in the upper-left quadrant of the page.

12. Now save your list using the button at the bottom of the page. Once saved, issue the certificate by clicking the **Issue Certificate** button at the bottom of the page.

Image 12: The Applicant List. This button is located in the lower-right quadrant of the page.

13. Once the certificate has been issued, the certificate will display as **Processing** on the Certificates tab. Click the Refresh button on your browser or navigate to another system page and back to the Certificate page to view the newly created **Certificate Number**. Click the **Certificate Number** to access the certificate.
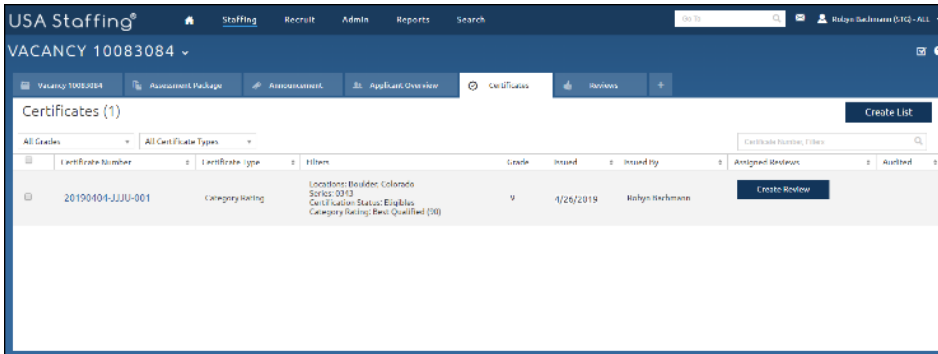

Image 13: Certificates tab with one certificated listed.

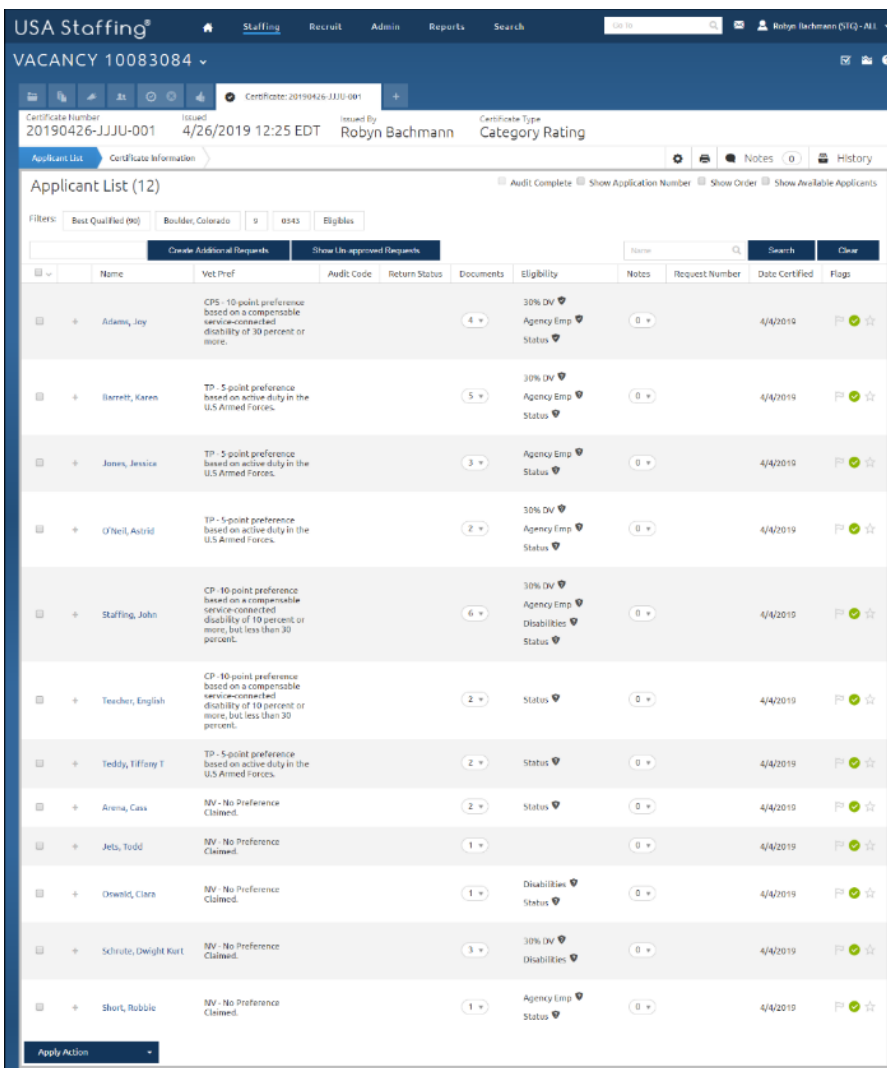14. Your certificate will open in a new tab. Click the Certificate Information tab.

Image 14: Certificate.

15. On the Certificate Information page:
    a. Un-check any Display Preferences you don't want your Hiring Manager to view for this certificate. Check with your agency's procedures to determine what you should be allowing Hiring Managers to view for each certificate type.
    b. Either type instructions or use the gear icon to pick **Select Instructions** if your agency has instructions templates.
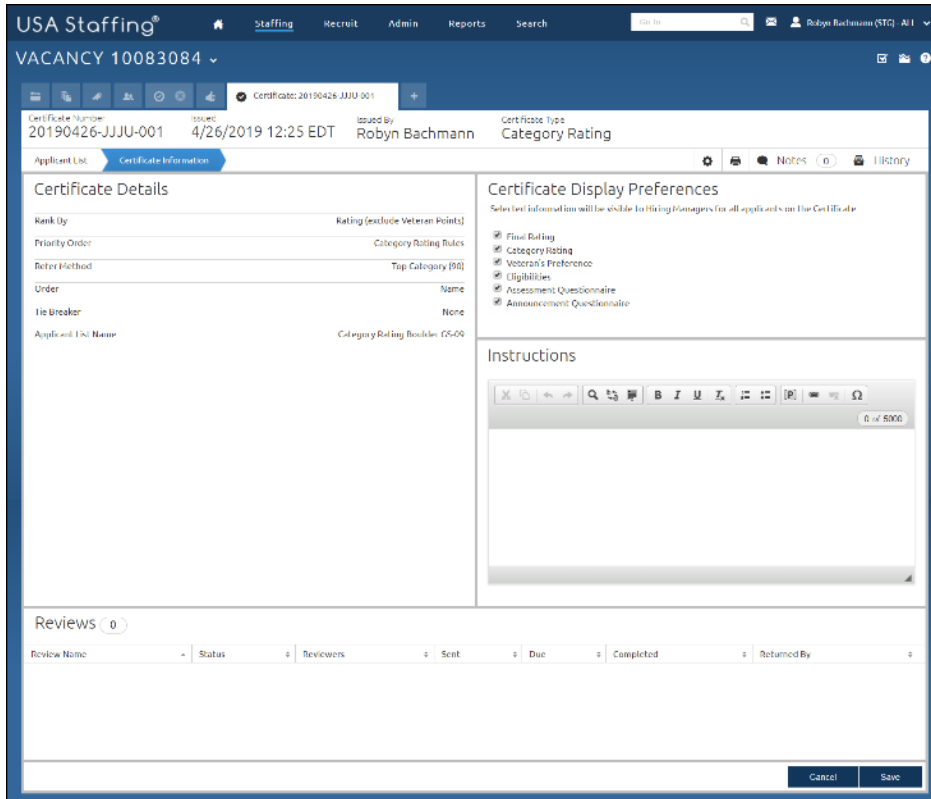
Image 15: Certificate Information page.

Now that you have a certificate you will want to notify your applicants.

16. Go to the Applicant Overview page. Click the **Send Remaining** button under the type of applicant Touchpoint Notifications that you want to issue.

Note: The system will automatically send the **Application Received** touchpoint for all applicants that have applied online. (Based on the Vacancy> Settings page.) Since this is a test environment and you may have Key Entered applicants, you may need to start with the **Application Received** touchpoint first if it is not displaying as 100%. If **Application Received** is at 100%, you can begin with the **Notice of Results**.

Image 16: Applicant Overview page. The notification buttons are in the upper-right quadrant of the page.

17. 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 Notice of Results since we selected **Send Remaining** from Notice of Results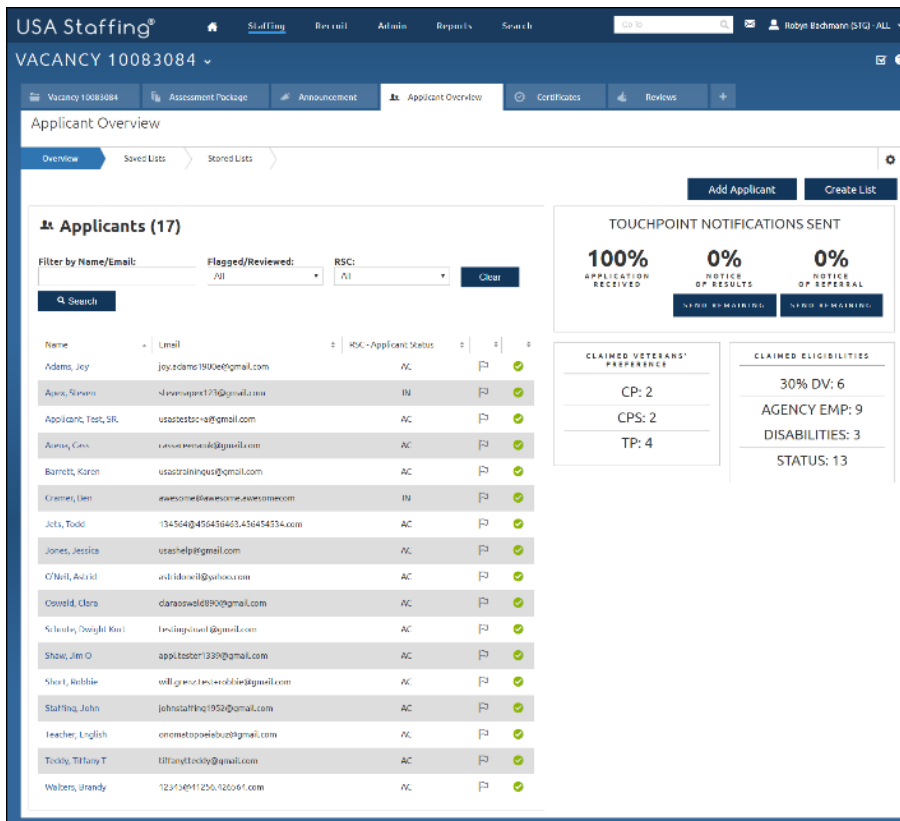. If you do not have any options or the options that you have are not what you need, you will need someone with adequate permissions in Stage to create a template. For detailed instructions for creating a notification template see: https://help.usastaffing.gov/USAS/index.php?title=Creating_a_notification_template . Remember, when creating a notification template the **Notification Type** will control which touchpoint the template is associated with.

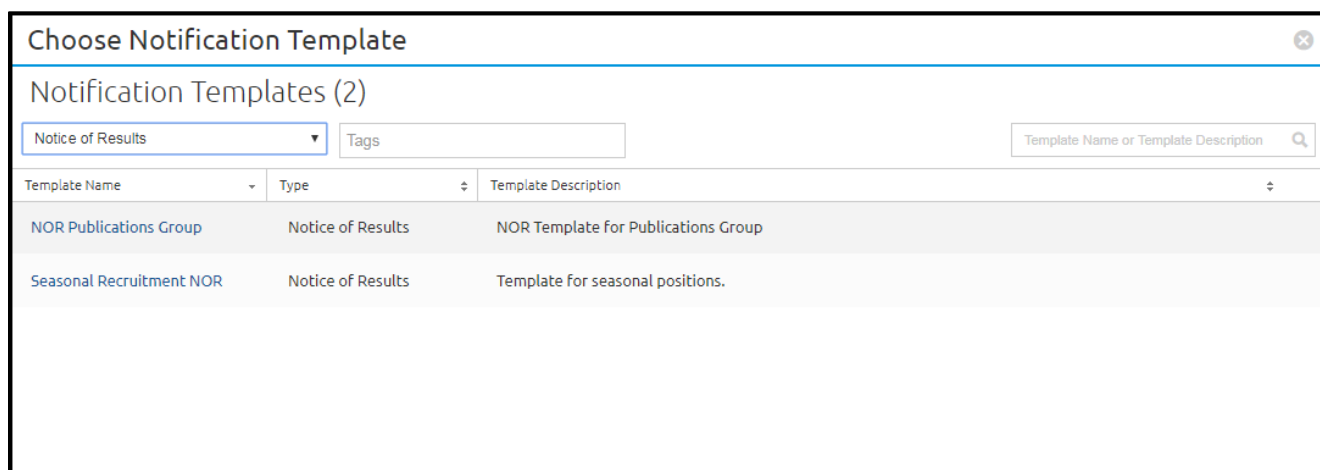Select the template you want to use by clicking on the **Template Name**.

Image 17: Choose Notification Template. The Notice of Results type is defaulted.

18. 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.
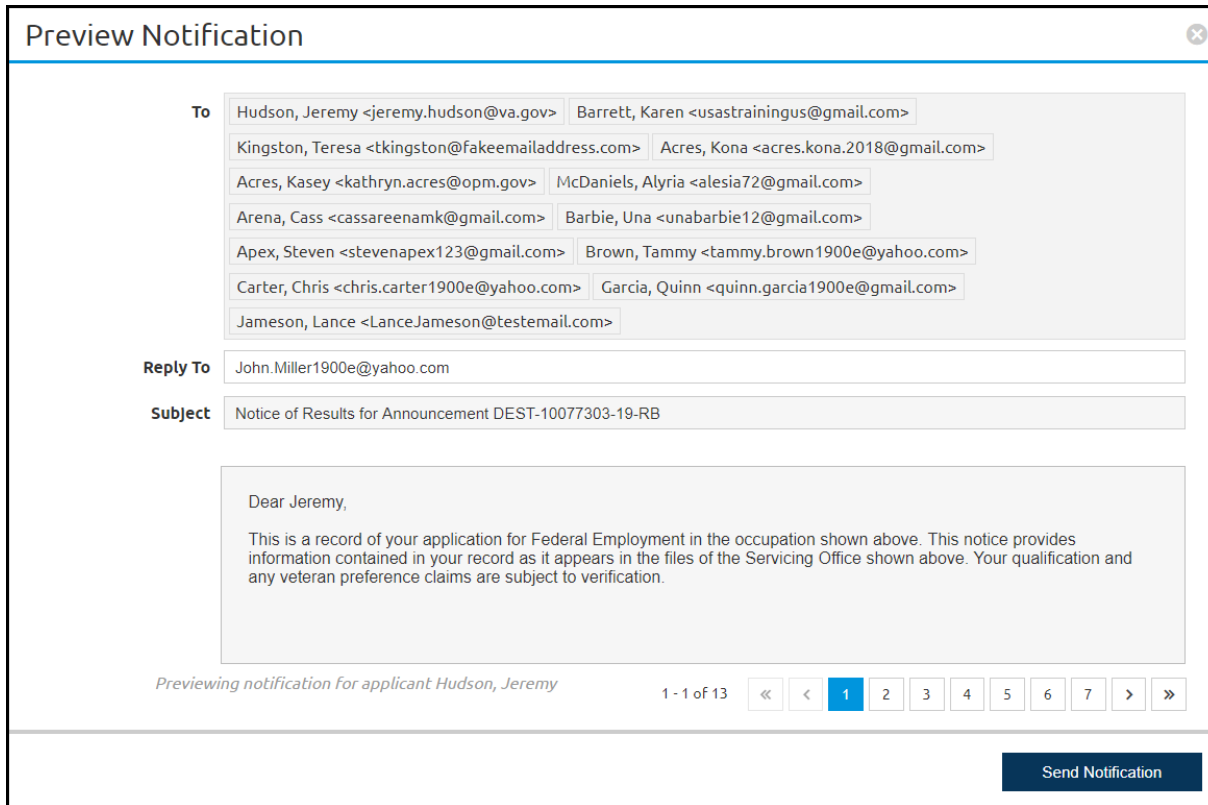

Image 18: Preview Notifications for Notice of Results.

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

19. 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. Even in the Stage environment, the system will send the notification letter when you press the **Send Notification** button. You will not be able to recall these messages. It would not be appropriate to send letters to 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.

20. Now that the notices have been sent, the Touchpoint Notifications Sent section will update. If all applicants have received a notification, the percentage will show 100% and the Send Remaining button will not display.
21. Repeat the process for any other types of notifications not yet at 100%.

This completes the lesson on creating a certificate.

Notes for Referral

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