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Reviews 101 for HR Users

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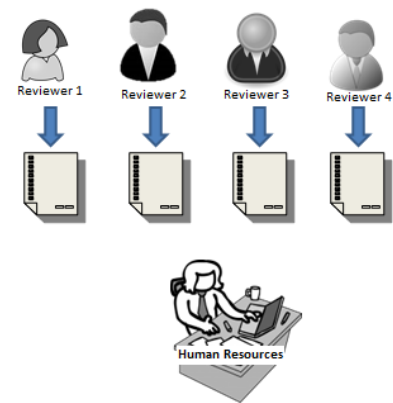
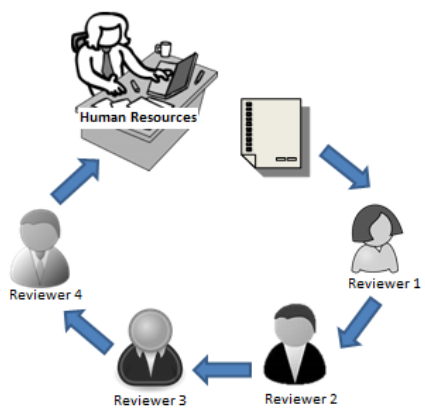
OPM HR SOLUTIONS
by government, for government

U.S. Office of Personnel Management
1900 E Street, NW, Washington, DC 20415

Overview

This document provides an overview on 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 assessments, announcements 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.

You can set up Reviews in different ways depending on the needs and business processes of your organization. Think about a Review like the traditional inter-office memo that had to be passed around an office to obtain approval/signatures. There are/were two distinct ways to do this:



OPTION 1: I have a form that requires 4 signatures. The final product must have all 4 signatures on the same version. I give the form to the first person, who signs and hands it off to the next, until all 4 have signed it. They must coordinate the passing of the form as it changes hands. The last person to sign is in charge of giving it back to me (or HR) but none of the others can return it before that final Review.

OPTION 2: I have a form that requires 4 signatures, but the final product does not need all signatures on the same copy. I make 4 copies of the form and give one to each person. Each signer then reviews and returns their version of the form back to me (or HR) when they are finished.

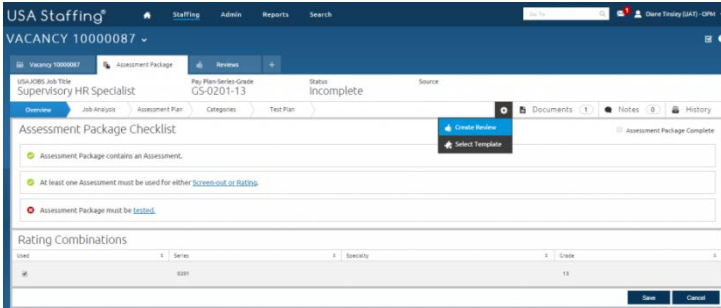
The option you choose may vary depending on what you're sharing in the Review. **Option 1** works well when multiple selections are being made from a single certificate, because Reviewers can coordinate between each other to ensure the same applicant isn't selected by two people. **Option 2** works well when multiple people are reviewing a draft of the announcement content, because each Reviewer can see the changes suggested by others.

It is important for the HR Team to understand the differences in these options, and manage the process according to your agency's business needs. Each Reviewer also needs to understand their role, especially those with the ability to "Return to HR" who are also monitoring the feedback of other team members.

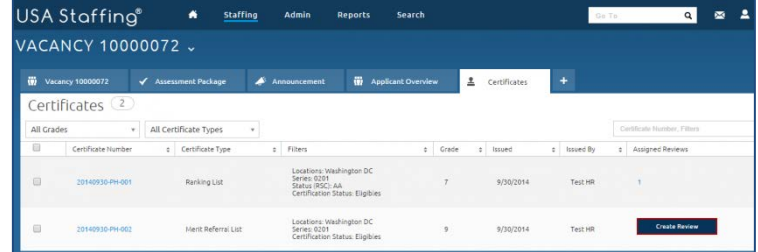
Accessing Reviews

Reviews are a new module within USA Staffing that open in a unique tab, just like Assessment Packages, Announcement and Certificates. HR users can also trigger a Review from multiple places within the system:

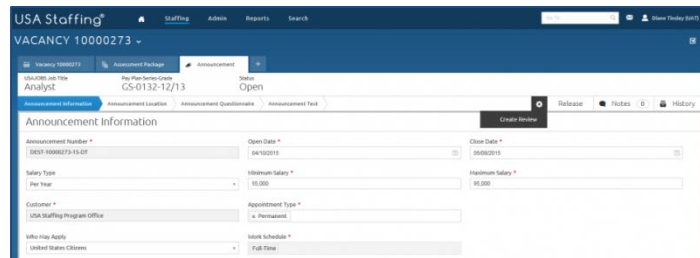
Within Assessments by clicking the gear icon



Within Certificates by clicking the Create Review button

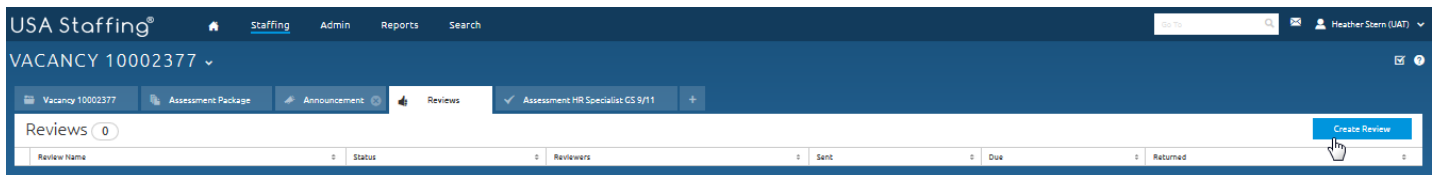


Within Announcements by clicking the gear icon

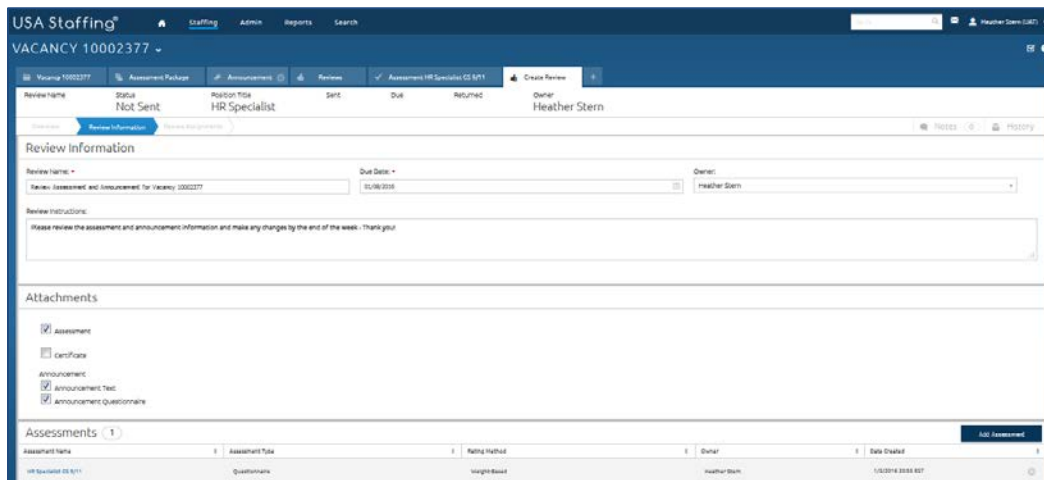


Create a Review

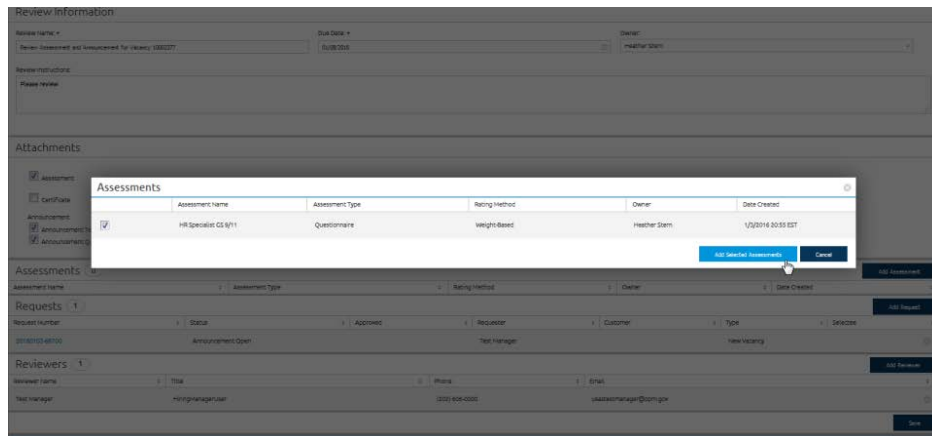
- From the **Reviews** tab- Click the Create Review button.



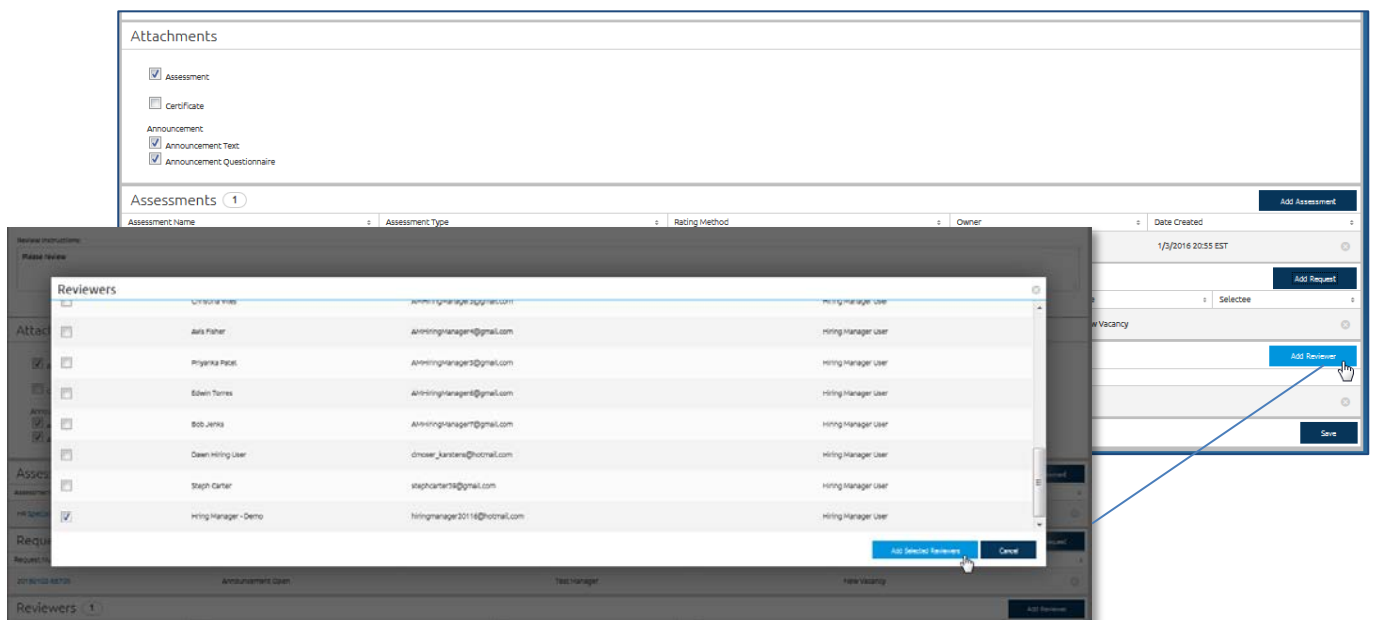
- Enter the **Review Name**. The name is the Hiring Manager's primary method of identification, so a best practice here is to include the vacancy or Request number in the Review name for tracking purposes and some description of the content. For example, "Announcement and Assessment Review - Request 1234-ABC"



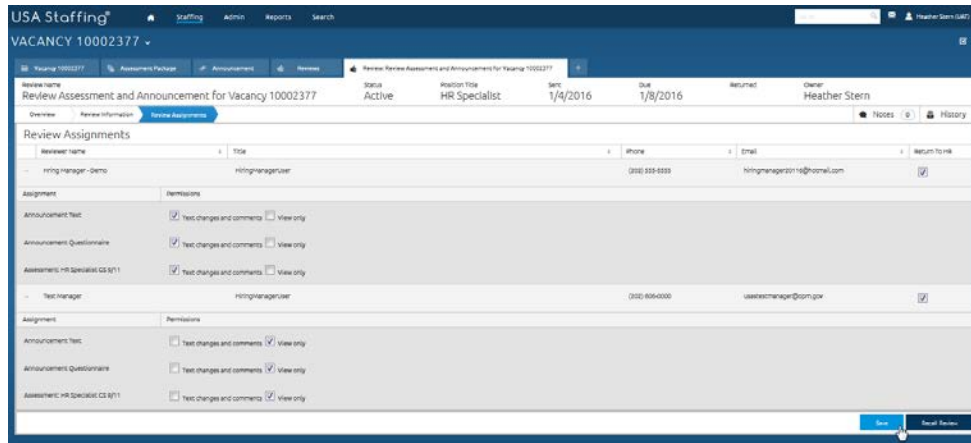
- Select a **Due Date** from the calendar drop down. This is for the Reviewer’s information and reporting purposes only. Reviews are not automatically recalled when the due date is passed.
- Enter **Review Instructions** for the Hiring Manager.
- Check off the **Attachments** relevant to the section of the Vacancy that you want the Hiring Manager to review. As you select the section you want, more information will appear in the box below
 - For example you would click “Add Assessment” below if you wanted the Hiring Manager to review that portion of the Vacancy



- The Request will be automatically populated if there is only one request linked to the vacancy, but you will have to select one or more as applicable if there are multiple requests linked to the vacancy.
- The Reviewer defaults to the Hiring Manager who submitted each request added to the review. Click “Add Reviewer” and choose from the list of Hiring Managers if you would like to add more Reviewers.
- Click **Save** to activate the Review Assignments page.

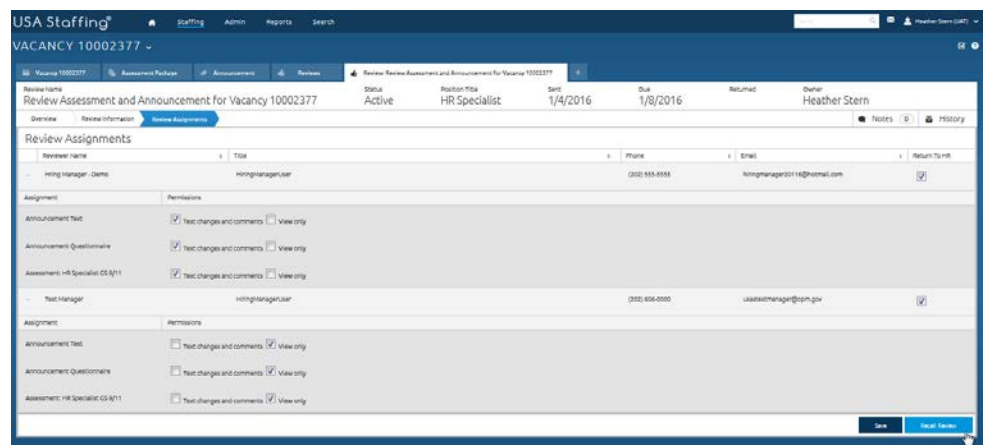


- On the Review Assignments sub-page, you can change permissions for each Hiring Manager (e.g., to enable them to return to HR or make text changes on the sections you have sent).



- The suggested changes from each Reviewer will be visible to all and tracked in a unique way. For example, edits to the announcement text will be highlighted in a different color for each Reviewer and time-stamped. Reviewers sharing certificates will see each other’s selections in History as well as any notes made.
- Think back to Options 1 and 2 above when assigning permissions, because the access you grant each Reviewer will depend on which option you are using. If you’re using **Option 1**, you may want to limit the “Return to HR” permission to a single Reviewer. Once a Reviewer returns a review to HR, other Reviewers will not be able to make edits or selections. You can offset this by assigning only one person to the ability to Return to HR – possibly the final level of approval your business process dictates.
- If your business process dictates that each Reviewer is distinct and has no interaction or dependencies on the other Reviewers, you may prefer to use **Option 2**. This means you would create a new Review for each Reviewer (and they would not show on this page together). Each one would be able to return to HR at their convenience and with their own feedback to HR.

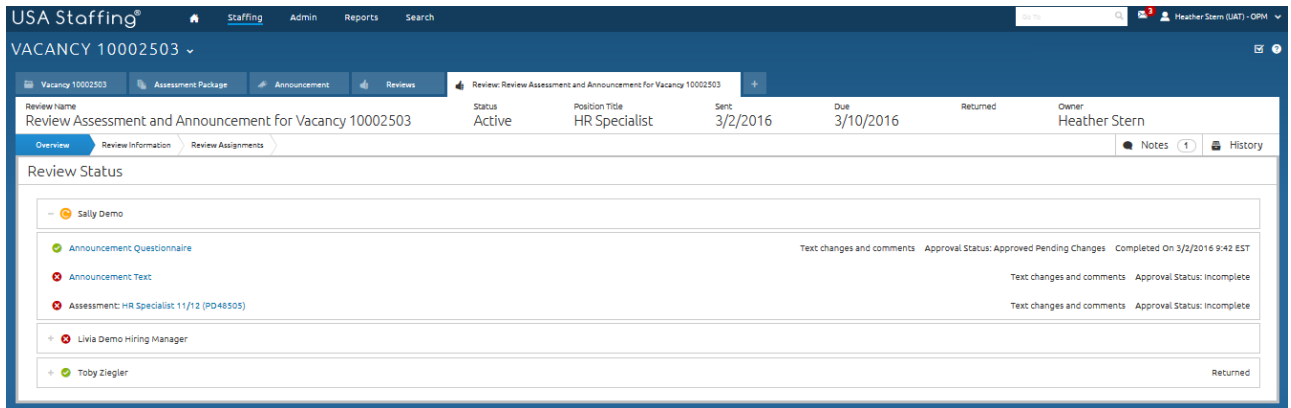
NOTE: If you need to make a change to an Assessment or Announcement you sent for review, you can use the “Recall Review” button. The drafts included in Reviews are a specific snapshot in time, so a new version has to be generated in order for the Reviewers to see updates. The only changes that will show in real time are the certificate changes; otherwise, we retain the authenticity of what was sent to avoid confusion. However, you can add Reviewers and update permissions without recalling a review.



Tracking Reviews

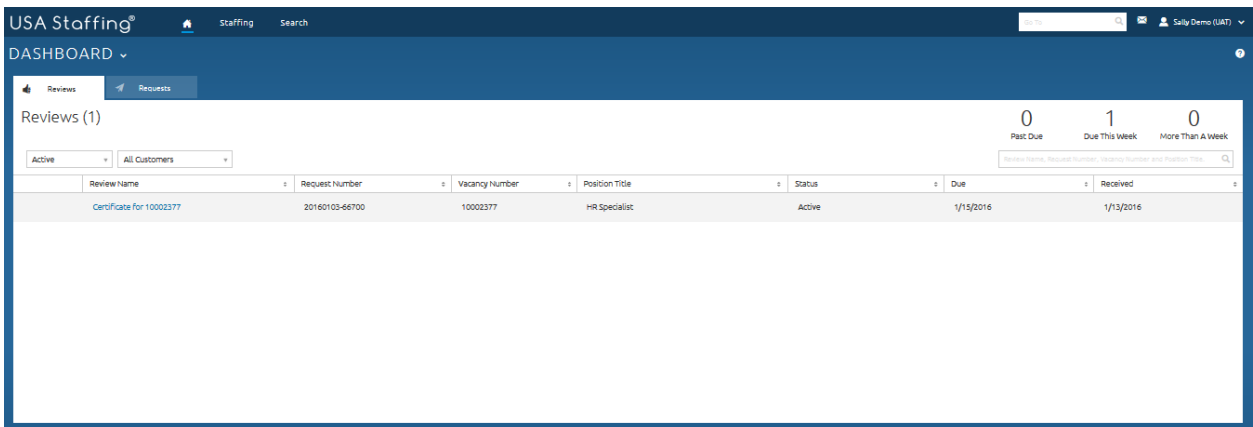
- The Review Overview Page shows the status of each review assignment for each reviewer, as well as tracking when they are returned. Assignment status is designated by

a red X (when the assignment is incomplete), a yellow arrow (when the assignment is in progress) or a green checkmark (when the assignment is complete).

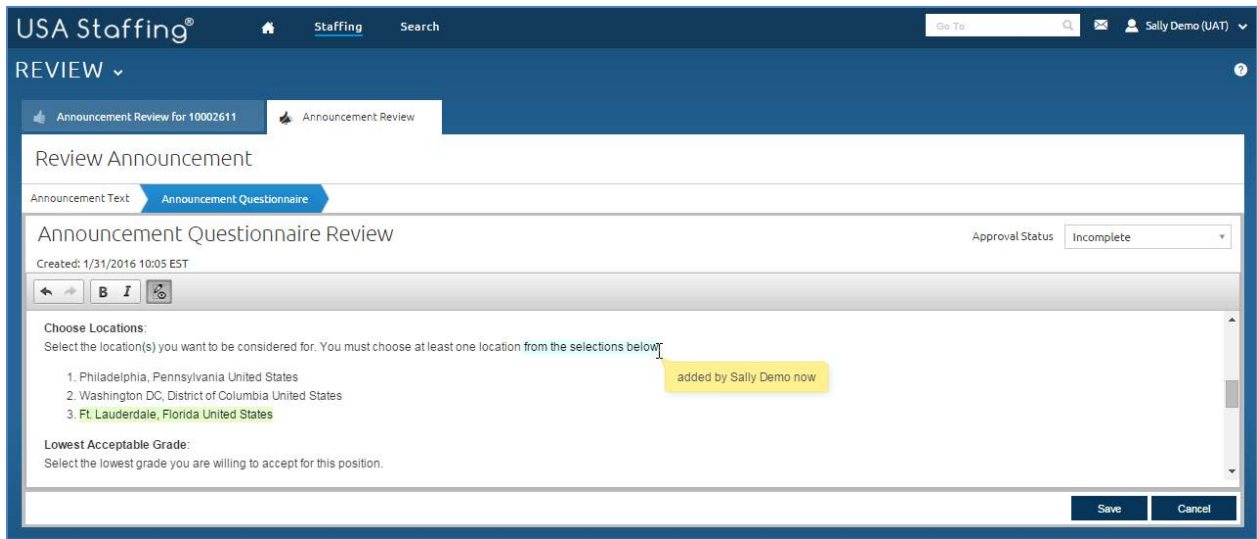


Hiring Manager View

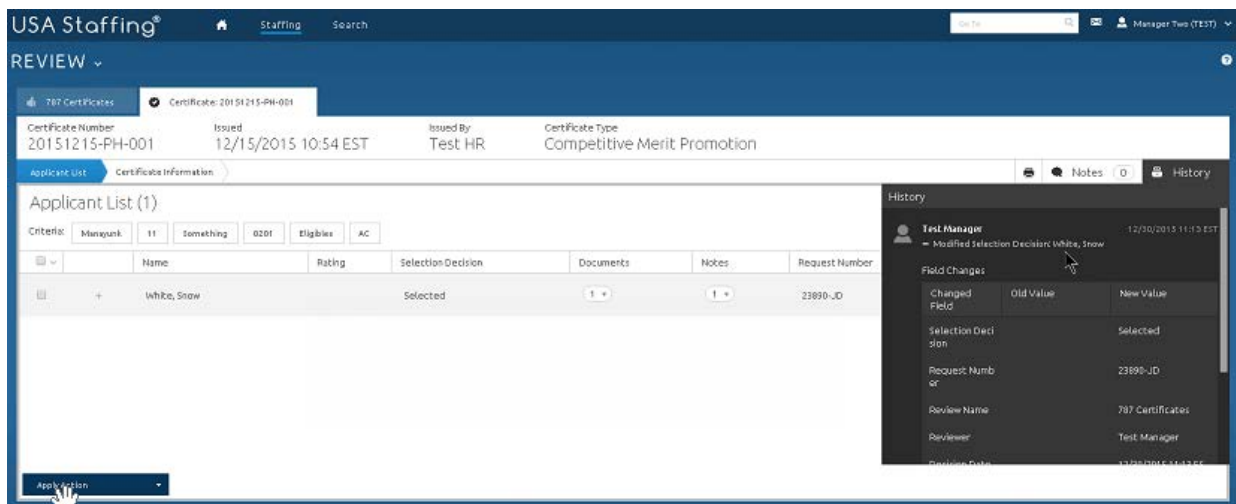
- Reviewers can be any hiring manager with access to the Customer record being serviced by the vacancy. If you don't see the name you're looking for, check to make sure their account exists and is linked to the appropriate customer.
- Once a Review is sent, the Hiring Manager (or other Reviewer) will receive an email inviting them to login for their Review and some basic instructions, including the due date and contact information for the HR point of contact.
- When Reviewers log in, they will see a dashboard similar to what HR sees- but much more limited in scope. We are working on updates to this page that will enhance the look and feel in the coming months; however, the functionality will remain the same.



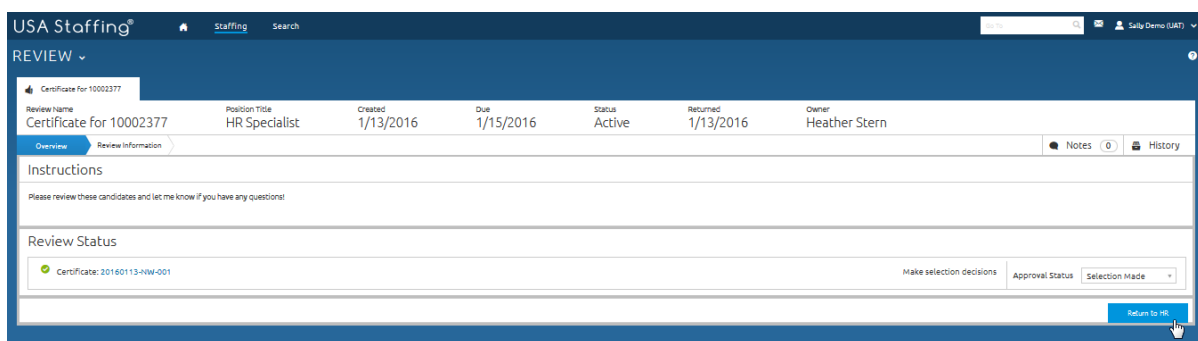
- If the Reviewer used the link included in the email notification, they will be taken directly to the review after logging in. By simply clicking on the items they have been sent to review (i.e., Assessment, Announcement or Certificate) they can provide feedback and/or selections tracked within the system.
- I can also see other Reviewers tracked changes before sending it back to HR. HR can review these suggestions/updates and make the change within the Announcement or Assessment as designated.



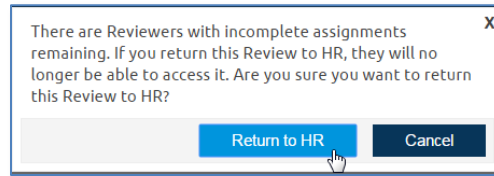
- As a Reviewer I can also see notes that were saved (these are permission based so that HR can decide which notes should be shared with a Hiring Manager and which should stay internal to HR)



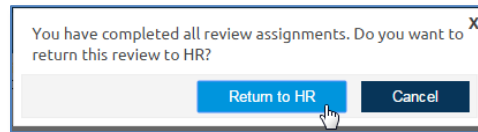
- Once a Reviewer is finished with the item(s) sent (Assessment, Announcement or Certificate), they can return the review to HR (assuming they have "Return to HR" permission).



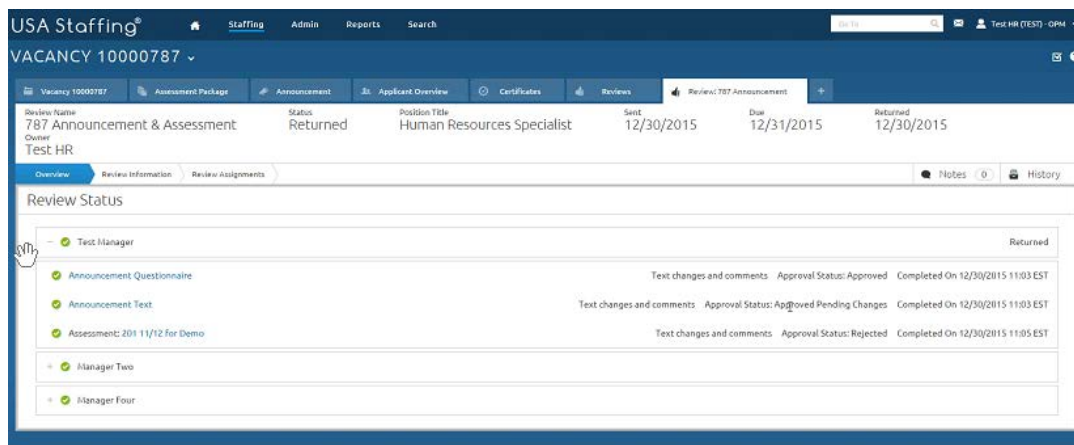
- If others have the Review assigned to them, and have not completed their assignments, they will receive a warning message



- If not, they will receive a confirmation message



- The HR user who “owns” the review will receive an automated email and user alert notifying them that a review has been returned. From the Review Information page, you can see the status of each assignment for each Reviewer.



A few important final reminders about Reviews:

- HR Specialists manage the Review process, assigning roles and permissions based on an agency’s business protocol.
- While the tracked changes feature may appear similar to Microsoft Word’s “track changes”, there is no “Accept” feature. Instead, specialists can utilize the tabs functionality to navigate between the open Review tab and the other Announcement or Assessment tabs to review and create the appropriate modifications.
- You may recall Reviews at any time to make changes and/or modify the Review. Once Reviews are recalled or Returned to HR, they will no longer appear on the Reviewer’s dashboard.