UNITED STATES OFFICE OF PERSONNEL MANAGEMENT

USA Staffing®
Training Manual

Version 1401

USA STAFFING®
Great Government Starts Here®

Proprietary Information

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HUMAN RESOURCES SOLUTIONS

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U.S. Office of Personnel Management
https://eshelp.opm.gov

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Section 1

System Overview

USA STAFFING®
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USA Staffing® System

SECTION 1 – SYSTEM OVERVIEW

USA Staffing is the U.S. Office of Personnel Management's (OPM) hiring software solution for Federal agencies. USA Staffing positions you to recruit, assess, certify, and select qualified candidates precisely, efficiently, and cost effectively. USA Staffing has features designed to support you at each phase of the staffing process.

- USA Staffing System Benefits and Features
- USA Staffing Areas
- USA Staffing System Users

USA Staffing System Benefits and Features

USA Staffing has the following features and benefits. It:

- Has a client/server architecture that allows users nationwide to access and share a common database.
- Provides full integration with USAJOBS.
- Supports flexible certification and referral needs.
- Provides an interface to import assessment tools.
- Supports case examinations and standing registers.
- Supports competitive and merit promotion vacancies.
- Supports permanent and temporary/term positions.
- Supports Veterans' Preference.
- Supports online application via USAJOBS and Application Manager.
- Supports Occupational Questionnaire – OPM Form 1203-FX. This alternate image-based form allows applicants to apply by completing and submitting their responses to the questionnaire via fax.
- Supports document upload and electronic case files.
- Accepts supporting documents, such as resumes, transcripts, and veterans documentation, by fax, provided applicants use the appropriate cover page.

USA Staffing is fully integrated with USAJOBS. Once job announcements are created and released through USA Staffing, they are automatically posted on USAJOBS. Applicants can view the job announcements through USAJOBS, and when they click the Apply Online button they are transferred to the Application Manager site to complete the questionnaire, upload supporting documents, and submit their application package online.

This is an example of a job announcement posted on USAJOBS.

See Appendix A for a sample job announcement created through USA Staffing and posted on USAJOBS.

USA Staffing Areas

USA Staffing consists of three work areas:

- **Staffing.** This work area comprises five sections that allow you to create vacancies; develop assessments to evaluate applicants; craft job announcements and advertise them on USAJOBS; review applicants for qualifications; and, through the referral section, certify the best qualified candidates.

- **Reports.** This work area provides a variety of standard reports and applicant correspondence related to the "applicant status touch points."

- **Administration.** This work area is where users with the appropriate permission profile can create and maintain user accounts, customers and contacts, announcement and assessment templates, system preferences, and default text for a variety of reports.

USA Staffing System Users

There are typically two types of personnel who use the system:

- Standard Users are primarily responsible for staffing job vacancies, performing work associated with announcing a vacancy, performing a job analysis, creating assessment tools, evaluating and referring candidates, and developing reports for the hiring officials and applicants.

- Office Administrators (OAs) perform all of the functions that Standard Users perform. In addition, OAs can set up, add, and maintain user accounts, announcement and assessment templates, and a variety of other system configuration options.

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Login and Logout

- Uniform Resource Locators (URLs)
- User Names and Passwords
- Initial Login
- Password Security
- Changing Your Password

Uniform Resource Locators (URLs)

To use OPM's USA Staffing System, you need a user name, a password, and the correct URL:

- USA Staffing "Training" URL: http://usastraining.opm.gov
  - User Name:_____
- USA Staffing "Production" URL: https://usastaffing.opm.gov
  - User Name: _____

User Names and Passwords

The USA Staffing Program Office assigns Office Administrators (OAs) user names. User names typically use the following conventions: first initial and/or middle initial followed by the first eight characters of your last name. For example, Dennis E. Harp would have a user name of DEHARP and Lisa M. Robinson would be LMROBINSON.

Note: Each user name is unique throughout the system. If another USA Staffing user already has the same combination of letters as your user name, then an alternative or variation of this convention must be used.

HOT TIP! USA Staffing user names are not case sensitive. This means that you can write your user name in all uppercase letters, in all lowercase letters, or in any combination of upper- and lowercase letters.

USA Staffing passwords must be complex so that they are not easily guessed. Here are the rules that apply:

- Your password must have a minimum of eight and a maximum of 20 characters.

- Your password must contain at least three of the following four attributes:
  - Uppercase (A–Z)
  - Lowercase (a–z)
  - Numbers (0–9)
  - Special characters
    - The special characters include the space ( ) and the following:

@	#	$	%	&
*	_	+	=	{
}	:	<	>	?

- Your password cannot contain your user name or any part of your full name.
- You may re-use a previous password, but only after you have used 24 other passwords.
- You must change your password every 60 days for security reasons. The system will notify you when it is time to change the password.

HOT TIP! Don't forget that USA Staffing passwords are case sensitive.

Initial Login

Using the naming conventions previously described, the USA Staffing Program Office or your Office Administrator (OA) has already assigned you a User Name. This identifies you as a unique individual authorized to use USA Staffing.

Password. To create your password, click the Forgot Password link on the login page. You will receive a system-generated email with a password activation link. Click the link in this email to create your USA Staffing password.

After the initial login you will need to acknowledge the USA Staffing Rules of Behavior. These rules are typical of a system of this type containing personally identifiable information.

HOT TIP! To keep your account secure, choose a good password – one that is difficult for others to guess but is easy for you to remember. Remember that you must keep your password secret.

Password Security

Your password is for your use only; keep it secret. This will help ensure that no one gains unauthorized access to the system or the information in it, which is protected by the Privacy Act.

If you think that someone else may have found out what your password is, change it immediately!

As an added security measure, if you enter your password incorrectly three times in a row, your account will be disabled. When this happens, the following message will display: “Your account has been disabled. Use the Forgot User Name or Forgot Password links on the Login page to continue.” You can use the Forgot Password link located on the login page to recover your password. You will be prompted to enter your email address; a new password activation link will be emailed to the address provided.

Password resets may only occur once within a 24 hour period. If you attempt to reset your password more than once within a 24 hour period you will receive a message that reads, "For security reasons, you may only reset your password once every 24 hours" when you attempt to confirm a second password change within a 24 hour period.

Time-Out. As a security measure, USA Staffing monitors your session to ensure it is active. If your session is inactive for 20 minutes, the system will time out and drop your session. At the 15-minute point, you will receive a popup message asking if you are still working; click OK to keep the session active. If there is still no activity between your session and the server after 5 minutes, you will get the warning again. If you save or move around the screens in USA Staffing, the timer will reset to 15 minutes. Remember, after 20 minutes, the system times out and you cannot do any further work until you log back into the system. Use the Save button often to save your work and keep your session active.

If You Forget Your Password. Use the Forgot Password link located on the login page to recover your password. You will be prompted to enter your email address, and a new password activation link will be emailed to the address provided. Follow the instructions provided within the email to create a new password and log in. Remember, passwords are case sensitive and may only be reset once within a 24 hour period.

Changing Your Password

Change your USA Staffing password at any time by doing the following:

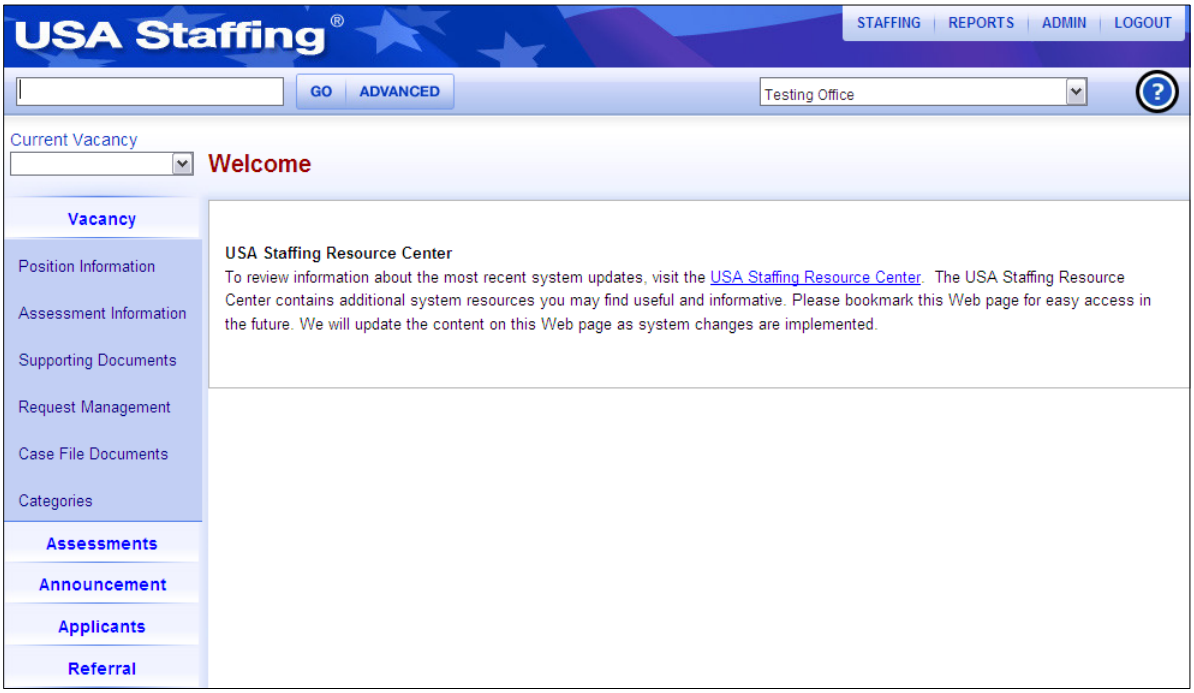
- Click the Administration button on the top navigation bar.
- Click the Maintenance button on the left menu bar.
- Select User Maintenance on the left menu bar.
- Locate your name on the User List. The User List page is arranged alphabetically; the default page lists last names beginning with A, then B, C, D, etc. Select the letter your last name begins with and use the scroll bars to locate your user account.
- Click the Open link on the row next to your user name. This will display the User Edit page.
- Click the Change Password button located on the top right area of the screen.
- Enter your current password in the box provided. Enter your new complex password twice in the boxes provided. Your new password must conform to the Password Rules.

HOT TIP! Since your password must be kept secret, you are the only one who can change your password. Don't share your password with others or let others change your password for you.

Navigation

- Menus: Overview
- Changing Your Office Connection
- Performing Searches: Basic and Advanced
- Performing Partial Searches

Menus: Overview



This screenshot shows the top navigation bar and the left menu bar. When an option from the top navigation bar is selected, the left menu bar displays a submenu of available options.

The top navigation bar includes the following:

- **Staffing.** This button provides access to the Staffing Work Area. When this option is selected, the left menu bar changes to reflect the sections available in the Staffing area. The Staffing area displays automatically when you log into the system.
- **Reports.** This button provides access to the Reports Work Area. When this option is selected, the left menu bar changes to reflect the sections available in the Reports area.
- **Admin.** This button provides access to the Administration Work Area. When this option is selected, the left menu bar changes to reflect the sections available in the Administration area.

- **Logout.** This button ends your USA Staffing session.
- **Go.** This button is used in combination with the text entry box to its left to perform a basic search.
- **Advanced.** This button is used to access the Advanced Search page to perform an advanced search.
- **Office name drop-down list.** This drop-down list allows you to change your office connection and work in another office to which you have access.
- **Question mark icon.** This icon provides access to context-sensitive online help content based on the page where it is clicked.

When you change work areas, the left menu items change to reflect the sections available in that area. By default, the Staffing area displays when you log in.

Changing Your Office Connection

The USA Staffing database stores work under the office it was created in. This provides each office using the system with a work area separate from other offices using the system. All offices share the same interface and functionality, but the database is partitioned to allow each office a separate area. Therefore, when you log into USA Staffing, you will automatically enter your office's electronic work area.

If you have permission to work within another office, you can log in and connect to that office. Once logged in, you can switch between the offices you have permission to access. The office you are logged into will appear in the drop-down list at the top of the page in USA Staffing.

The picture above shows the Testing Office. To change your office, simply select a new Office from the drop-down list on the top navigation bar to the right of the Advanced search button. The page will refresh and you will be able to work within the selected office.

Performing Searches: Basic and Advanced

There are two search levels within OPM's USA Staffing System: basic and advanced.

To perform a basic search:

- On the top navigation bar, click inside the text entry box to the left of Go.

Type a number in the text entry box.

If you type …	USA Staffing will look for …
A six-digit or seven-digit number	A Vacancy ID Number (VIN)
A nine-digit number	A Social Security Number
A fourteen-digit number and letters	An issued Certificate Number

The basic search knows the difference between a Vacancy ID Number (VIN), a Social Security Number, and a Certificate Number.

- Click the Go button to the right of the search text entry box.

For example, if you know the Vacancy ID Number for the Vacancy record you want to use, simply type it in the basic search text entry box and click the Go button.

Note: Searches are limited to your office's data. If you want to look for data belonging to another office, change your Office Connection. Remember that you can only change your Office Connection to offices from which you have received permissions.

To perform an advanced search:

- On the top navigation bar, click the Advanced button to go to the Advanced Search page. On the Advanced Search page, specify in the Look In drop-down list where you want USA Staffing to look. The page will refresh with a form containing the proper fields for the selection you make.

- Type the search criteria into any of the search fields: Series, Beginning Grade, Ending Grade, Job Type, or Vacancy Type. Use any field or combination to narrow your search. At least one field must contain data.

- Click the Go button.

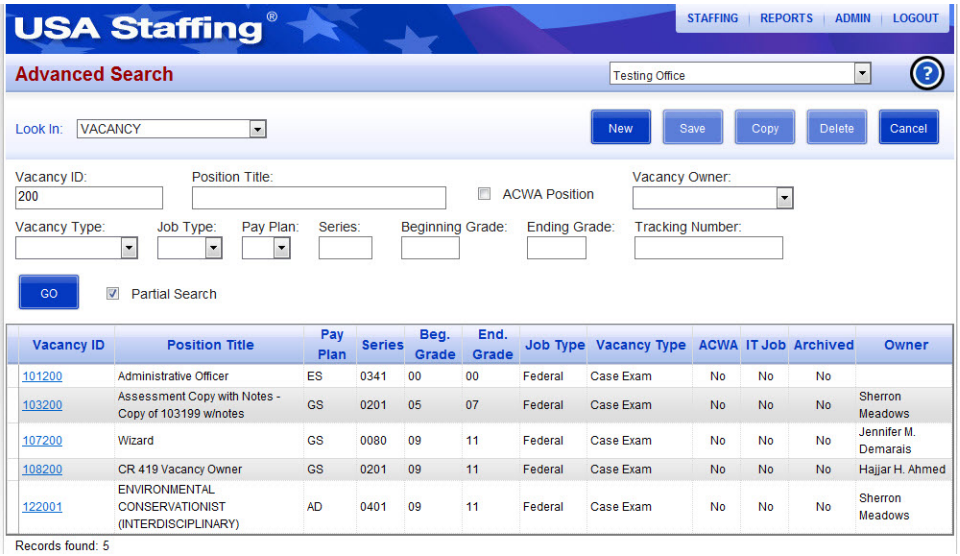
Performing Partial Searches

Partial Search is useful when you know part of the information for which you are looking. When you use the Partial Search option, your search results will include records that partially, but do not exactly, match your search criteria. For example, on the Vacancy search screen if you type *man* in the Position Title field as your search string, your search results will include both Human Resource Specialist and Office Manager. It does not matter where in the Position Title the search string *man* occurs.

To perform a partial search:

- On the top navigation bar, click the Advanced button to go to the Advanced Search page. On the Advanced Search page, specify in the Look In drop-down list where you want USA Staffing to look.
- Type the search criteria you want to use into any of the search fields. This example uses the last name of Smith.
- The Partial Search box is checked by default.
- Click the Go button to the left of the Partial Search box.

  Note: If the Partial Search box is unchecked, the system will look for exact matches to what you type in the search fields. Every letter and space must match exactly. When any matches are found, the system will display them in a table below the search form.



If multiple records are found, a list will appear on the table. This picture shows the search results for “Vacancy 200.” To open a record in the table, click the Vacancy ID number link to the left of the record. If only one record is found, the system will automatically open the record.

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Customer Maintenance

If your permissions profile gives you access, you can use the Customer Maintenance pages to add, edit, or delete customer records, and view the contact records for your customers. Most Standard User profiles have this capability.

Customers are components of offices within your organization or agency. Contacts are individuals who are associated with your customers.

- Customer List
- Customer Edit
- Creating or Modifying a Customer Record
- Customer Contact
- Creating or Editing a Contact
- Deleting a Contact

Customer List

To access the Customer List page:

- Click the Administration button on the top navigation bar.

Note: The Maintenance section on the left menu bar will default to open.

- Select Customer Maintenance within the Maintenance section.

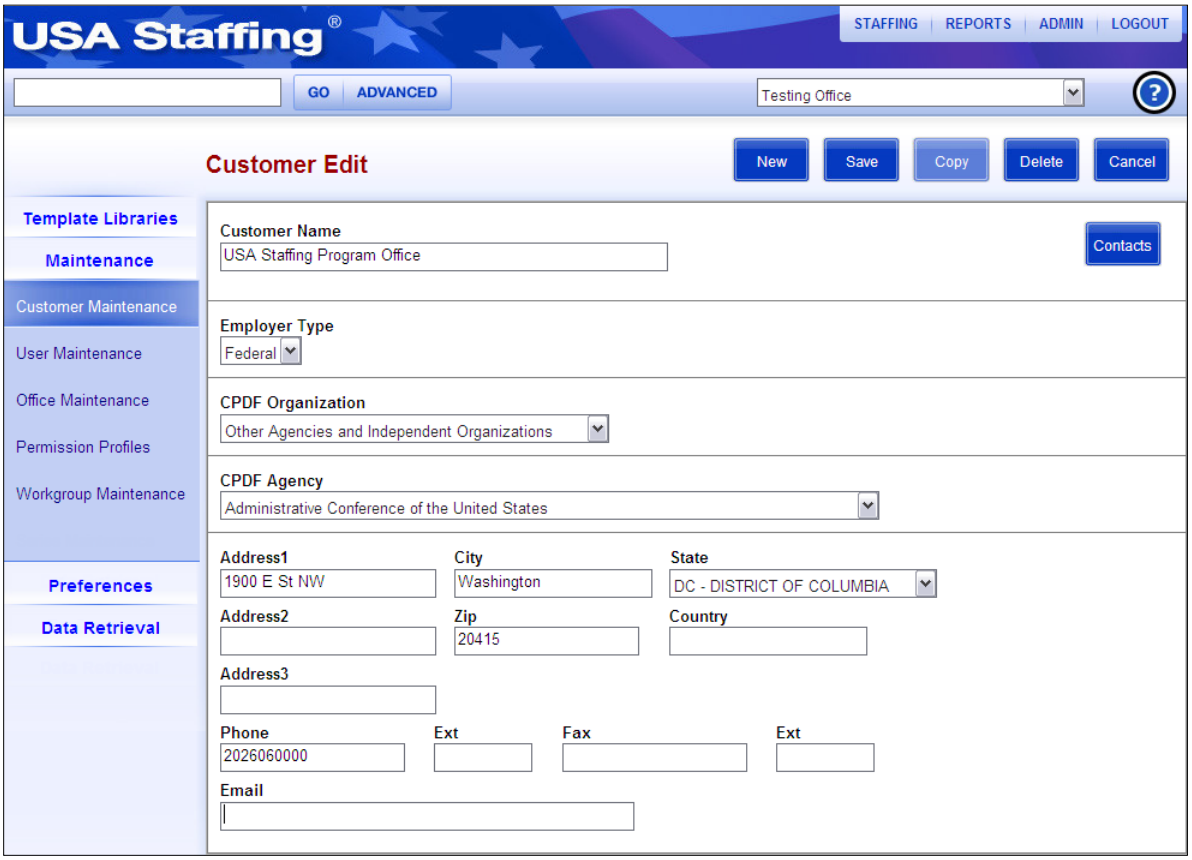
Note: The page will refresh to display a list of all Customer Names for that office. Customer names that are marked "deleted" are not included on this list. To display deleted customer records, check the Display Deleted box.

From this page, you can edit or create a new customer:

- Click on the Customer Name link to open an existing customer record to edit it.
- Click the New button to create a new customer record.

  Note: It is important that customer tables are well organized. When you create a new customer, review the existing customers to ensure you are not duplicating customers that already exist.

Customer Edit



On the Customer Edit page, you can do the following:

- Edit an existing customer record by changing the address or the CPDF Agency.
- Create a new customer record.
- Delete a customer record.

- Add a contact to the customer.
  - Contacts are individuals associated with this customer.
  - Contacts are typically individuals who will receive the referral lists if you send them electronically.

Creating or Modifying a Customer Record

You can modify a customer record on the Customer Edit page by doing any of the following:

- Enter the Customer Name exactly as you want it to appear in the system.
- Click the Contacts button to view or modify contact records associated with the customer record you have displayed.
- Select the Employer Type of the organization from the following options: Federal or State.
- The CPDF Organization and CPDF Agency boxes are available only when the Employer Type selected is Federal. For Federal agencies, select the appropriate designations that identify the Organization and Agency from the CPDF listing.
- The Address fields pertain to the customer record, although there may be different addresses and phone numbers for each contact you add. This makes it possible for you to have contacts whose addresses differ from the address in the customer record.

Customer Contact

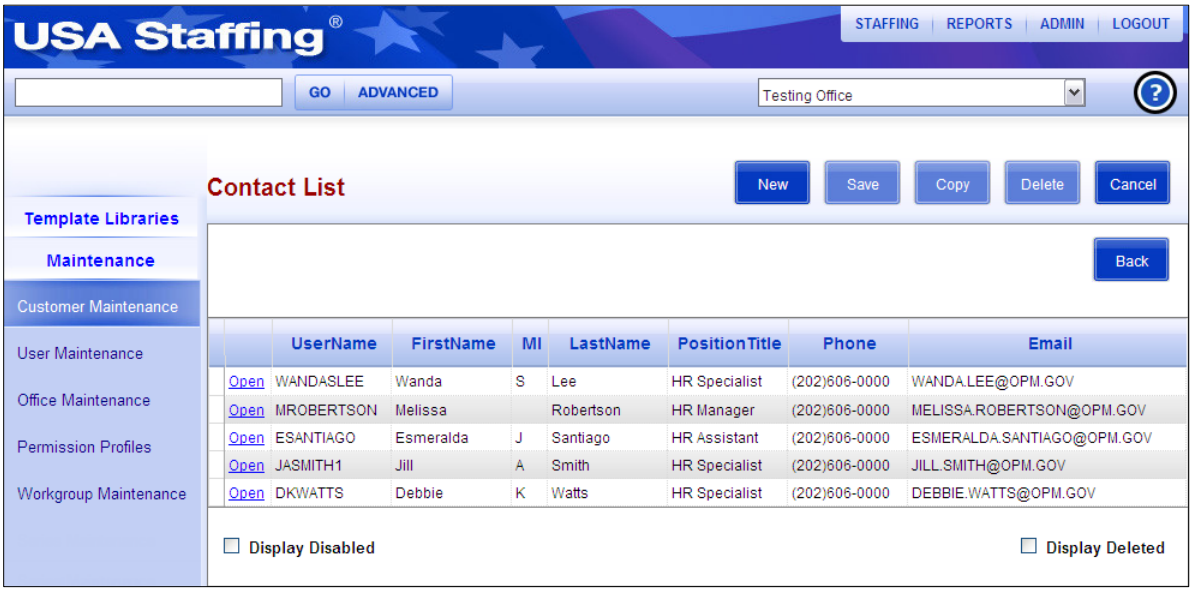
Adding a Customer Contact is the second step in creating a customer record. Once you save the customer's name and address, the Contacts button is available. The contact is the person within that customer office who is responsible for submitting the staffing request or who will receive the referral list. Typically, the contact is named on Standard Form 52 in block 3 or 5. Customers typically have multiple contacts.

On the Customer Contact page, you can do the following:

- Create a new customer contact record.
- Edit an existing record.
- Delete an existing record.

Creating or Editing a Contact

The Contact List page lists all contacts for the customer record you have selected at that time. You can add or delete names as required.



	UserName	FirstName	MI	LastName	PositionTitle	Phone	Email
Open	WANDASLEE	Wanda	S	Lee	HR Specialist	(202)606-0000	WANDA.LEE@OPM.GOV
Open	MROBERTSON	Melissa		Robertson	HR Manager	(202)606-0000	MELISSA.ROBERTSON@OPM.GOV
Open	ESANTIAGO	Esmeralda	J	Santiago	HR Assistant	(202)606-0000	ESMERALDA.SANTIAGO@OPM.GOV
Open	JASMITH1	Jill	A	Smith	HR Specialist	(202)606-0000	JILL.SMITH@OPM.GOV
Open	DKWATTS	Debbie	K	Watts	HR Specialist	(202)606-0000	DEBBIE.WATTS@OPM.GOV

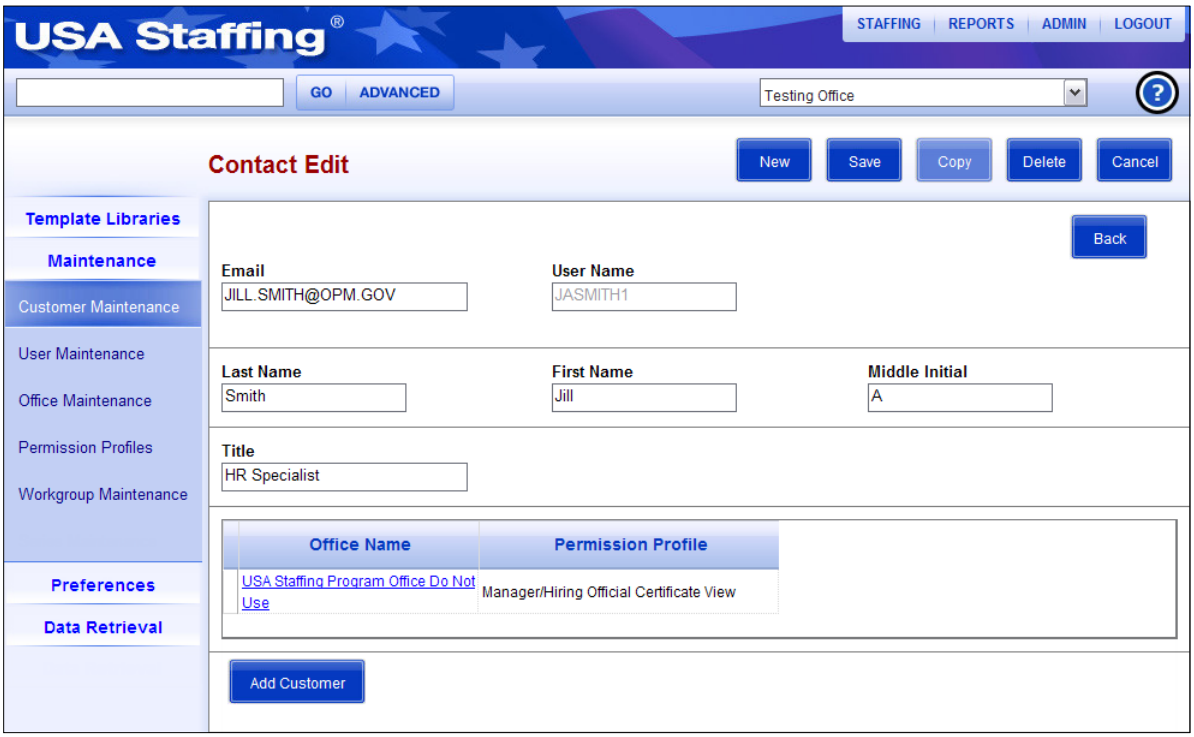
By default, the Contact List displays only contact records that are not marked as deleted or disabled. To include contact records that have been marked as deleted or disabled, click the appropriate checkbox – Display Deleted or Display Disabled.

A check in the box means that deleted or disabled records have been included in the Contact List displayed.

To create a new contact:

- Click the New button.
- Follow the instructions provided in the Contact Edit form.
- Click the Next button to continue.

The last Contact Edit page will display the contact information and the list of customers or offices to which this contact is assigned. Additional customers may be added by clicking the Add Customer button. All customers within an organization will be listed and available for selection.



To edit an existing contact:

- Click the Open link on its row.
- The Contact Edit page will display the contact information and the list of customers to which this contact is assigned. Additional customers may be added by clicking the Add Customer button. All customers within an organization will be listed and available for selection.
- After completing the Contact Edit form, click the Save button.

  Note: When a new contact is assigned to a certificate for the first time, they will receive a system-generated email notifying them that a certificate is available for their review; this initial email will contain their user name, and a URL to retrieve their password and log into Selection Manager. However, the first time they need to access Selection Manager, you may want to explain the process and provide any login related instructions since some agencies block this type of automatic email notification.

Here are descriptions of certain fields on the Contact Edit forms:

- **Email.** Enter the contact's work email address. This address must have a *.gov*, *.mil*, *.edu*, or *.org* ending. For security reasons, the system will not accept personal email addresses (for example, John.Manager@yahoo.com).
- **User Name.** This is a free-form field that will accept up to 10 characters. Type in the user name you want to assign to this contact. If you leave this field blank (allowed), the contact will not have access to Selection Manager.
- **Allow Selection Manager Access?** Check this box to enable the contact to use Selection Manager to review applicants referred on a certificate.
- **Use this Customer's address data for this contact?** Click this box to use the address from the customer record. If this is checked, the address fields below are disabled and default to the customer address. If you un-check this box, you can modify the address to make it different from the address in the customer record.
- **Address Area.** All the Address fields pertain to the contact individually and are part of the contact record. This makes it possible for you to have contacts whose addresses differ from the address in the customer record.

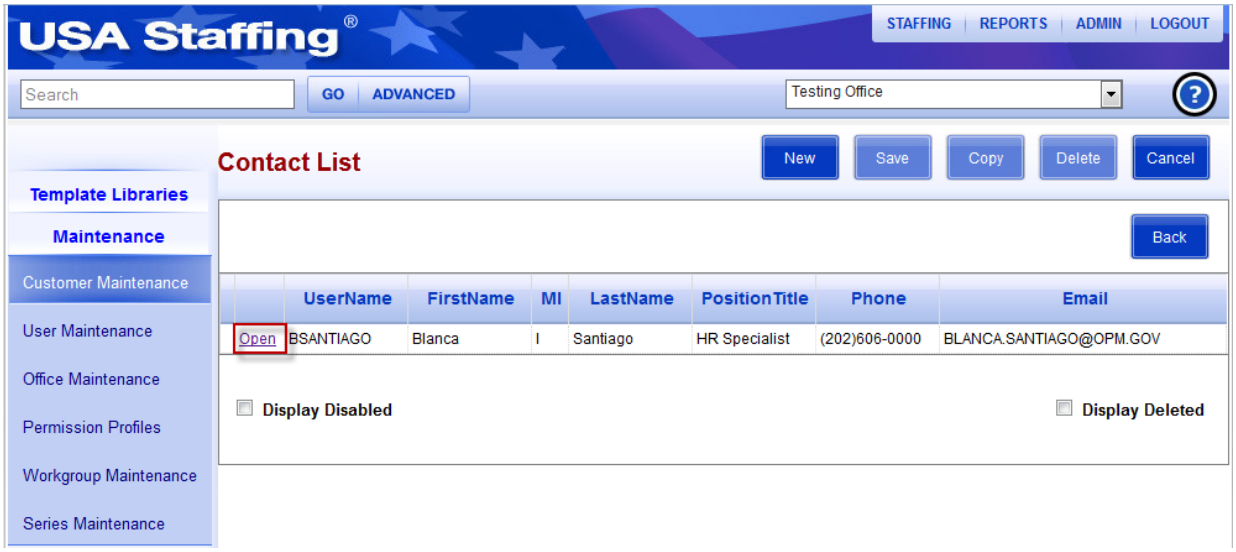
HOT TIP! Setting up a contact record with access to Selection Manager does not automatically mean this contact would have access to every certificate issued under this customer. At the time you create a request and issue referral lists or certificates, you will associate the contact's name with the request to allow the contact to view the certificate through Selection Manager.

Deleting a Contact

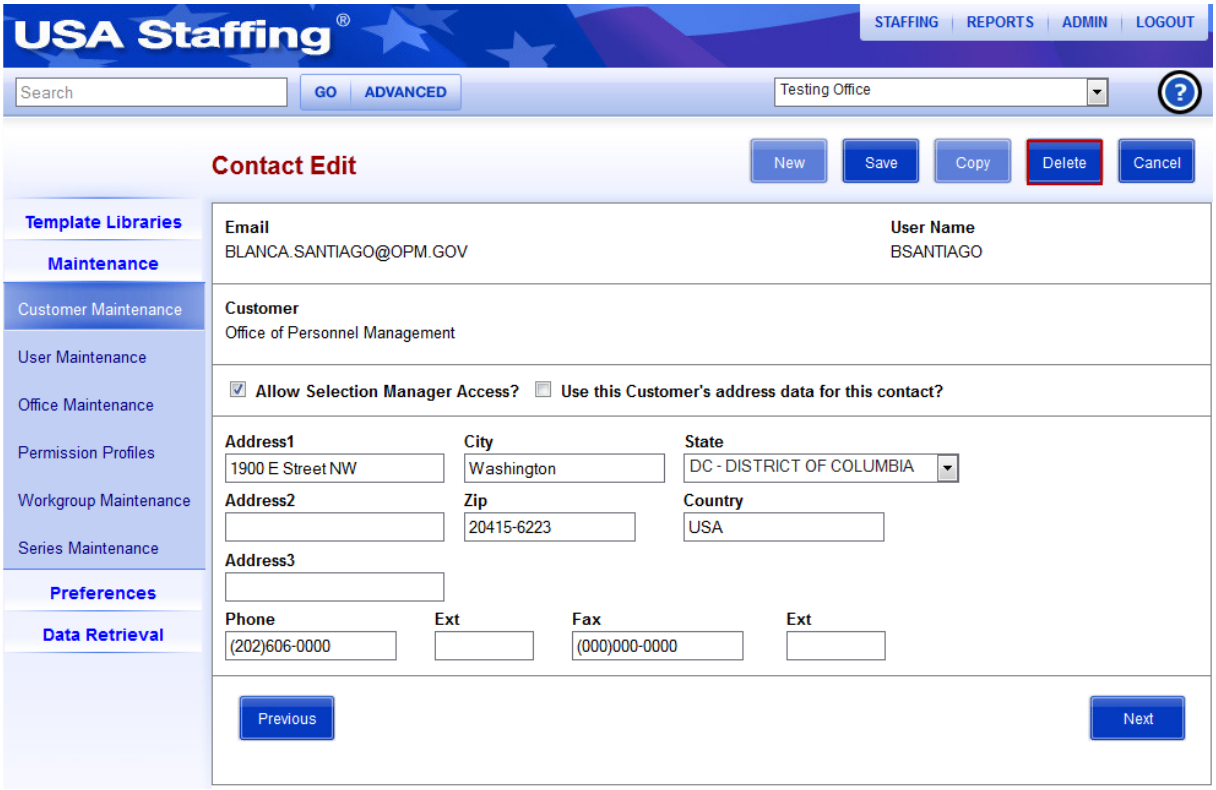
This function marks a record as deleted and removes it from the main Contacts table.

To delete a contact:

- Click the Open link on its row.



- Click the Delete button.



Check Your Skills – Create Customer and Contact Records

To practice your skills in creating new customer and contact records, take 10 minutes to perform the following exercise.

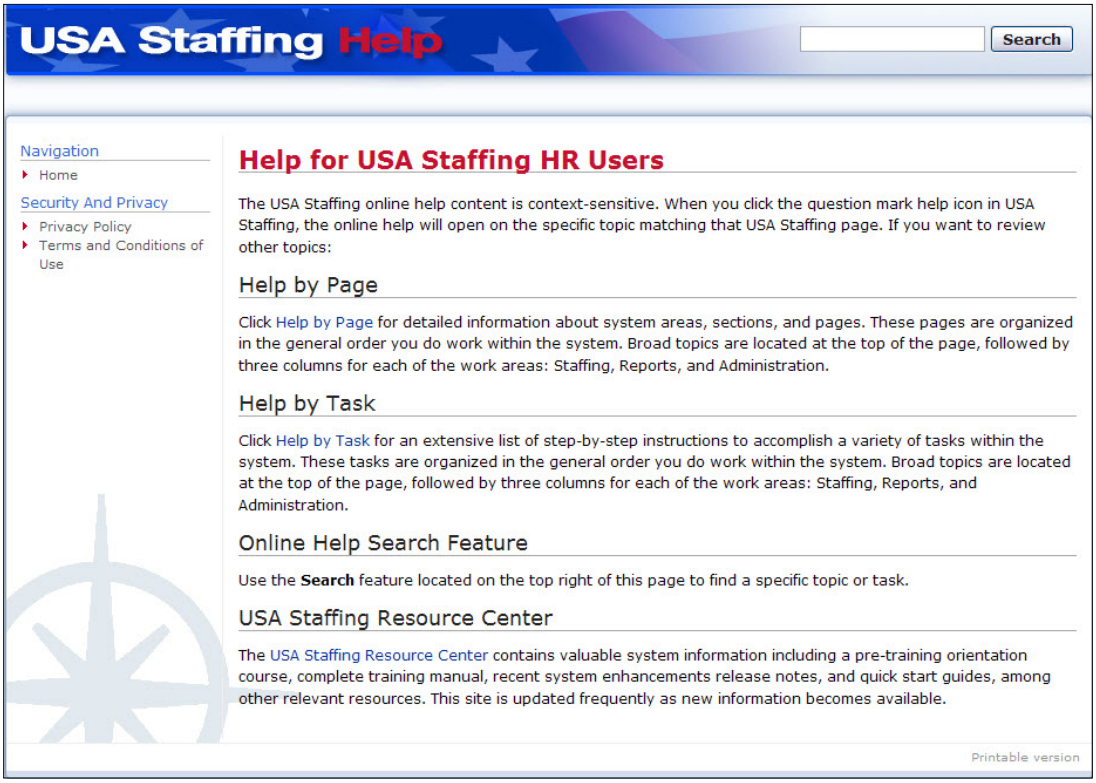
Note: The customer in USA Staffing is a component or office within your organization and is never an individual. Individuals associated with your customer are listed as contacts.

To create a customer and contact record:

1. Click the Administration button on the top navigation bar.
2. Click the Customer Maintenance button on the left menu bar. If there are customers in the office, a list of existing customers will display. If there are no customers, you will see a blank table.
3. Click the New button at the top of the Customer List screen.
4. Enter a customer's name. Write down the name of the customer you created for use in a later activity: _____.
5. Employer type defaults to Federal.
6. Select the CPDF Organization and CPDF Agency.
7. Enter Address information for this customer.
8. Click the Save button at the top of the Customer Edit screen. The Contact button will now be available.
9. Click the Contact button.
10. Click the New button on the Contact List screen. You should now see the Contact Edit screen.
11. Complete the information on the Contact Edit screens. Write down the name of the contact you created for use in a later activity: _____.
12. Click the Save button.

Using the Online Help System

If you have questions about the USA Staffing system, you can access the online help system and the USA Staffing help desk.



The USA Staffing online help content is context-sensitive. When you click the question mark help icon in USA Staffing, the online help will open on the specific topic matching that USA Staffing page. If you want to review other topics:

- Click Home, Help for USA Staffing Users, and Help by Page for detailed information about system areas, sections, and pages. These pages are organized in the general order you do work within the system. Broad topics are located at the top of the page, followed by three columns for each of the work areas: Staffing, Reports, and Administration.

- Click Home, Help for USA Staffing Users, and Help by Task for an extensive list of step-by-step instructions to accomplish a variety of tasks within the system. These tasks are organized in the general order you do work within the system. Broad topics are located at the top of the page, followed by three columns for each of the work areas: Staffing, Reports, and Administration.

- Use the Search feature located on the top right of this page to find a specific topic or task.

The USA Staffing Resource Center also contains valuable system information including a pre-training orientation course, complete training manual, recent system enhancements release notes, and quick start guides, among other relevant resources. This site is updated frequently as new information becomes available.

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