Section 2

Staffing

USA STAFFING®
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SECTION 2 – STAFFING

Vacancy

- Welcome
- Create a New Vacancy
- Position Information
- Assessment Information
- Supporting Documents
- Request Management
- Case File Documents
- Vacancy Category

The Vacancy module is where the staffing process begins in USA Staffing. Here the vacancy is established and the Vacancy ID Number (VIN) is assigned. Assessment criteria, announcements, and applicants are tied to specific VINs. Certificates and notifications are issued under the VIN as well. The VIN and all associated information are retained as a permanent record in USA Staffing.

Welcome

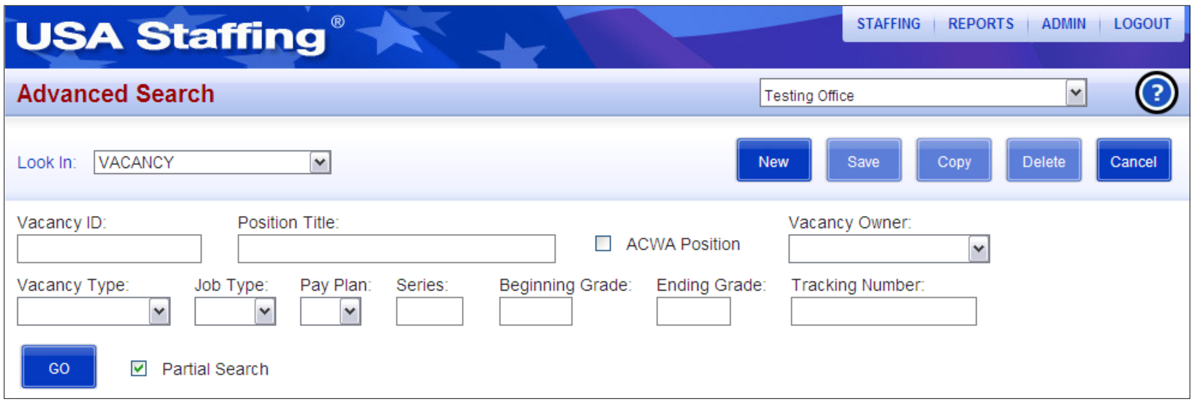
Once logged into USA Staffing, the first screen to appear is the Welcome page.

The Program Office often uses the Welcome page to share system-related information with all USA Staffing users. It is used primarily to notify users of system downtime or something that affects all users (see example above). OAs can place office-specific messages on this page.

Create a New Vacancy

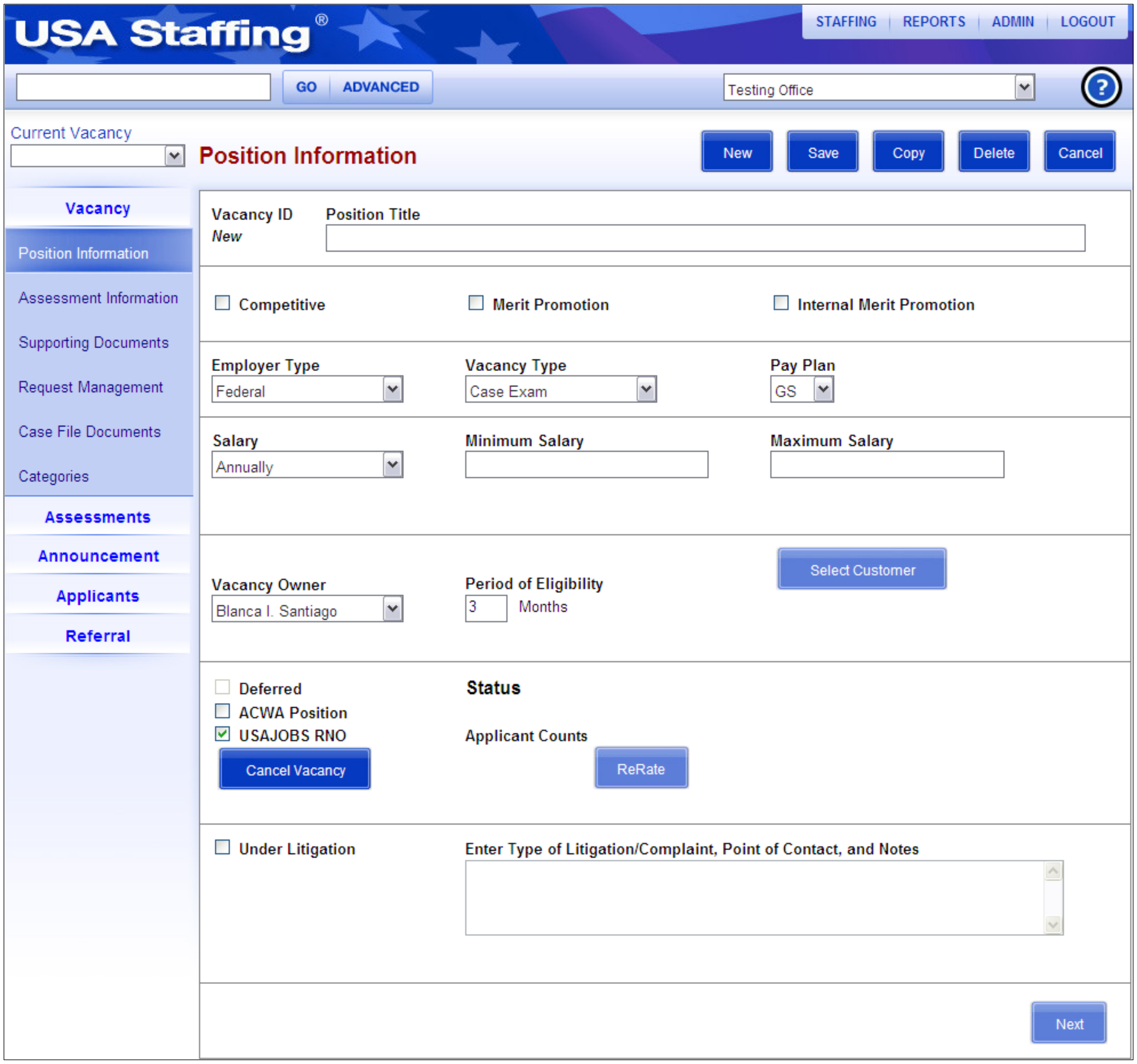
To create a new Vacancy, do the following:

- Click the Vacancy button on the left menu bar.
- The following screen will display.



- Click the New button at the top of the page.
- A blank Position Information page will display.

Position Information



There are five buttons across the top of the Position Information page common to all screens in USA Staffing.

- **New.** This button creates a new Vacancy.
- **Save.** This button saves your work progress.
- **Copy.** This button copies a previously created Vacancy.
- **Delete.** This button deletes the displayed Vacancy record.
- **Cancel.** This button cancels the previous action.

These buttons are active or inactive (grayed out) depending on where you are in the system and what you are trying to do.

Position Title. The position title entered in this field will appear on the job announcement and anywhere the tag "Position Title" is used. The position title should be in plain language and should not use abbreviations or acronyms. This field has a 100-character limit.

Competitive. Check the Competitive box when the position is open to all qualified applicants under competitive examining procedures. Job announcements using this area of consideration will be searchable on USAJOBS by all applicants provided they use the filter "Only Public Jobs Open to ALL U.S. Citizens."

Merit Promotion. Check the Merit Promotion box when the position is open to candidates who are current or former Federal employees, or other people who are entitled to apply under an agency's Merit Promotion Plan. Job announcements using this area of consideration will be searchable on USAJOBS by applicants claiming to be eligible based on their status as a current Federal employee. The USAJOBS filter for these types of jobs displays as "ALL Jobs (Public and Status)."

Internal Merit Promotion. Check the Internal Merit Promotion box when the position is open to candidates who are current Federal employees or other people who are entitled to apply under an agency's Merit Promotion Plan. Job announcements using this area of consideration will not be searchable on USAJOBS.

Applicants can access Internal Merit Promotion announcements only via a job-specific URL, e.g., http://www.usajobs.gov/GetJob/ViewDetails/XXXXXXXXX. The "XXXXXXX" in this URL represents the USAJOBS control number for the vacancy announcement. This number is displayed in the upper right corner of the Preview page once the announcement has been released to USAJOBS.

Note: The Competitive, Merit Promotion, or Internal Merit Promotion selections will determine the options you have in the Who May Apply field of the Announcement page. The selection informs USAJOBS where to place this announcement for search purposes, i.e., jobs open to status candidates or those open to the all qualified candidates. In addition, the selections also determine the type of certificates that can be issued for the vacancy.

Employer Type. This is always Federal.

Vacancy Type. This is the type of vacancy you are announcing: Case Exam or Standing Register.

Pay Plan. Use this drop-down list to select the appropriate pay plan. (See the following URL for Pay Plan Codes: http://www.opm.gov/feddata/gp59/cpdf/payplan.pdf.)

Salary. Select the appropriate pay schedule for the position. The options are: Annually, Hourly, Weekly, Monthly, Fee Basis, Per Day, Piece Work, Student Stipend Paid, School Year, or Without Compensation.

Minimum Salary. Enter the starting salary for the series, location, and grade announced.

Maximum Salary. Enter the ending salary for the series, location, and grade announced.

Vacancy Owner. This drop-down list initially shows the user who creates the vacancy. If appropriate, another user can be designated as the owner by selecting his or her name from the list. This is used for work ownership tracking and reporting purposes.

Period of Eligibility. Indicate the number of months an applicant will receive consideration for this position. The system will use this value to calculate the eligibility end date in the applicant's record. The system default is 3 months.

Select Customer. Click the Select Customer button to initiate searching for and selecting a customer record to link to a vacancy.

Deferred. This is a rating method used in special circumstances.

ACWA Position. This check box is read-only. After you link the assessment to the vacancy, the system will make a determination as to whether or not the position is covered by the Administrative Careers with America (ACWA) exam.

USAJOBS RNO. This checkbox prompts the system to collect Race and National Origin (RNO) data from USAJOBS and makes it accessible for reporting in USA Staffing.

Applicant Counts. This area shows the number of applications received for the vacancy. These numbers are system-generated for informational purposes and cannot be modified.

ReRate. Click the ReRate button to initiate a re-rate of all applicants.

Note: If you want to re-rate one applicant, do not click this button. Instead, go to the individual applicant record and click the Re-Rate button. This way the re-rate is processed for only the individual applicant instead of the entire applicant pool.

Status. This feature allows users to monitor and track work by phases of the staffing process.

- **Pending –** This is the initial default status for all vacancies. Vacancies will be in pending status until the assessment and announcement are marked "complete."
- **Waiting to Open –** This is the status if an announcement is marked "complete" and is waiting for the opening date to arrive. When the opening date arrives, the status will automatically change to Open.
- **Open –** This is the status for jobs that are open and are accepting applications.
- **Awaiting Certification –** Once the announcement closes, the status is Awaiting Certification until the first certificate is issued. This status may also be triggered in a later step by creating a new stored list of applicants (implying that additional certified applicants have been requested).

- **Awaiting Selection Decision –** Once a certificate has been issued, the status will become Awaiting Selection Decision. This status remains until all issued certificates have been audited.

Note: If a Stored List remains in the Referral area after all certificates have been audited, the status will not update to Completed.

Example:

- **Completed – Selection(s) Made –** When all audits have been received and an applicant has been audited as hired (marked with a Return Status of "Hired"), the status will become Completed – Selection(s) Made.

- **Completed – No Selection Made –** When all audits have been received and no applicant has been hired (no applicants were marked with a Return Status of "Hired"), the status will become Completed – No Selection Made.

Cancel Vacancy. To cancel a vacancy, click the Cancel Vacancy button on the Position Information page. This will change the vacancy status to Cancelled, and a cancellation date will be assigned. Jobs may be moved out of Cancelled status by clicking the Restore Vacancy button on this page.

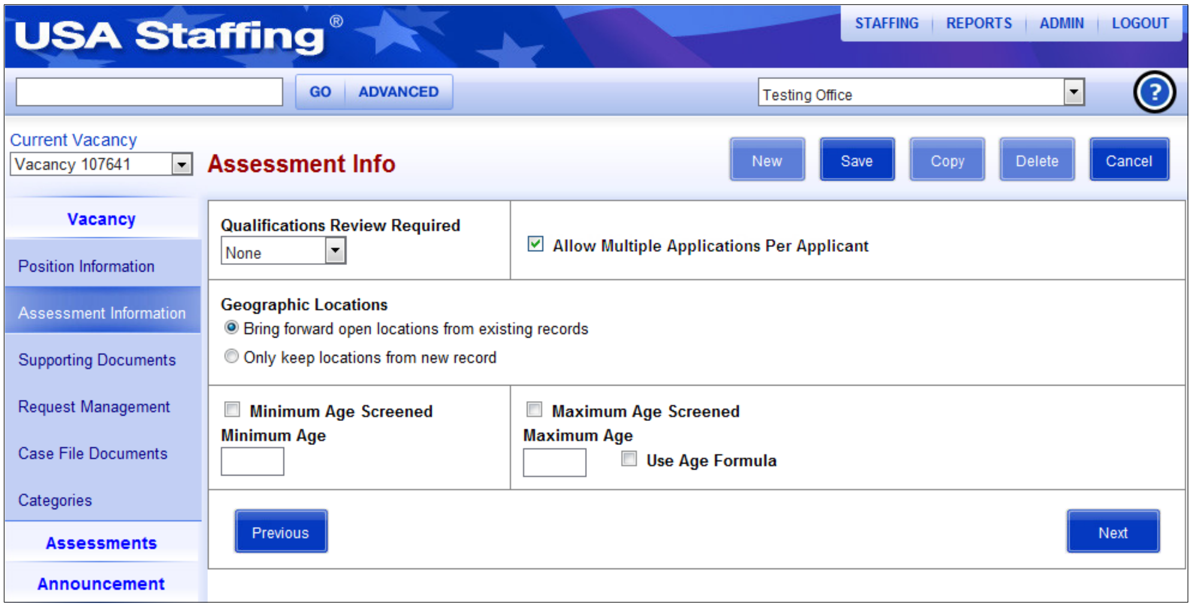
- **Evaluation In-Process –** There will be a short period of time after a vacancy is restored where the system will display Evaluation In-Process. Afterwards, the system will assign the appropriate status based on the conditions listed above.

Under Litigation. Check this box to annotate a vacancy that is under litigation or complaint. Vacancies designated as Under Litigation will not be archived or purged from USA Staffing. All data and applicant documents in these VINs will remain on the live database indefinitely or until the Under Litigation box is unchecked.

Note: Enter the litigation/complaint type, point of contact, and other related notes to document the Under Litigation designation.

Assessment Information

There are several categories of assessment information.



Qualifications Review Required. The system settings to indicate the status of a qualifications review requirement are:

- **None.** (default option) Leave this as the default option if you want all applicants to be processed and rated immediately.
- **Eligibles Only.** Select this option if you want those applicants meeting minimum qualifications to be placed in PQ status (pending quality review) when they enter into the system. A manual review must be completed for eligible applicants. A rating is not available until a manual review is completed.
- **All Applicants.** Select this option if you want all applicants (eligibles and ineligibles) to be placed in PQ status when they enter into the system. A manual review must be completed for all applicants. A rating is not available until the review is completed.

Allow Multiple Applications Per Applicant. When this box is checked (default), an applicant is allowed to submit more than one application for the VIN. The last application submitted is the active record in the system; there is no capability to switch between, evaluate, or rate applicants on the previous DP (duplicate processed) records. However, previous applications will be stored in a DP status within the applicant's record. When this box is not checked, an applicant may submit more than one application for the VIN, but the first application submitted is the active record in the system; there is no capability to switch between, evaluate, or rate applicants on the subsequent DU (duplicate unprocessed) records. Subsequent applications will be stored in a DU status within the applicant's record.

Geographic Locations. The system settings for these are**:**

- If the default option **Bring forward open locations from existing records** is selected, newly chosen locations are added to previously chosen locations for an applicant who reapplies.

- If the option **Only keep locations from new record** is selected, only those locations in the new application are kept active for an applicant who reapplies. This option is used for Standing Registers.

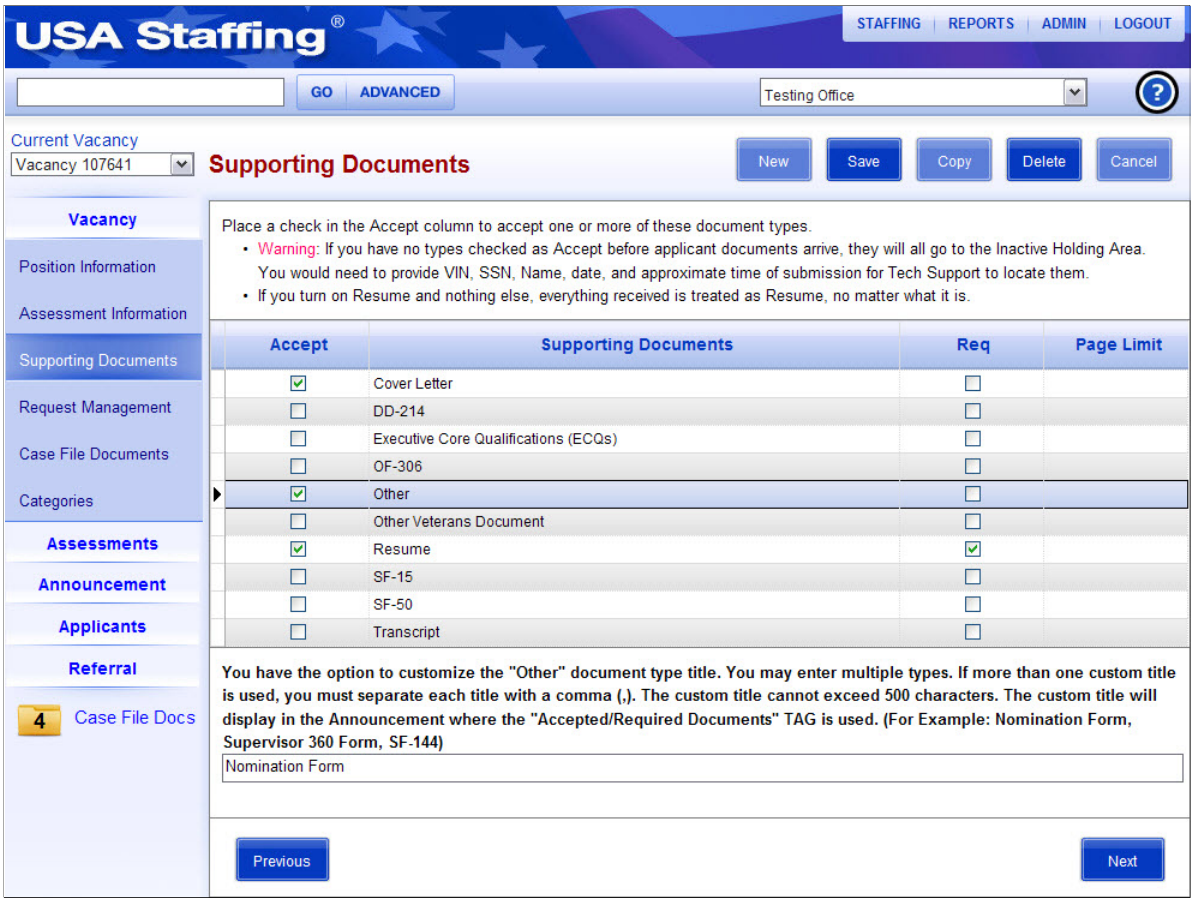
Minimum Age Screened. Check this box and enter a minimum age if you want to enforce a minimum age restriction. Applicants who do not indicate they meet the minimum age requirements will be rated ineligible.

Maximum Age Screened. Check this box and enter a maximum age if you want to enforce a maximum age restriction. Applicants who indicate they are past the age limit will be rated ineligible. If you use this option, you must also use the Job Related Experience item in the Announcement area. Applicants who claim Veterans' Preference are not screened out for exceeding the maximum age restriction.

Use Age Formula. Check this box to set the system to use information collected in the "Date of Birth" and "Job Related Experience" sections of the Announcement Questionnaire to calculate maximum age requirements.

Supporting Documents

This page allows you to select the type of documents you want to accept and those that are required. If the applicant does not submit a required document, their record will be in PF (pending form) status. USA Staffing stores documents in electronic form under the applicant's record. The documents received in the applicant's record are also displayed in the Application Manager Details tab for this vacancy. If you mark items on this page, the Required Documents section of the vacancy announcement should reflect the same requirements and explain to applicants what they are expected to submit.



You can designate these types of documents in USA Staffing.

Cover Letter. This supporting document type can be used for a cover letter providing necessary or additional information regarding the application.

DD-214. This supporting document type can be used for the DD-214 providing a verified record of a service member's time in the military, awards, and medals, and other pertinent service information, such as promotions, combat service or overseas service, Military Occupational Specialty identifiers, and record of training and schools completed.

Executive Core Qualifications (ECQs). This supporting document type can be used for a variety of documents required for entry to the Senior Executive Service.

OF-306. This supporting document type can be used for information used to determine acceptability for Federal and Federal contract employment and enrollment status in the Government's Life Insurance program.

Other. This supporting document type can be used for any document that does not already have its own type, such as license, certification, performance appraisal, and recommendations. You have the option to customize the "Other" document type title and may enter multiple types.

Other Veterans Document. This supporting document type includes a variety of documents that serve as proof of the applicant’s veteran status.

Resume. This supporting document type can be used for a resume or any other written summary of the applicant’s education, work experience, and accomplishments.

SF-15. This supporting document type can be used to adjudicate applicants' claim for veterans' preference in accordance with the Veterans' Preference Act of 1944.

SF-50. This supporting document type can be used to verify accessions, conversions, or separations for employment eligibility.

Transcript. This supporting document type can be used for an applicant’s official or unofficial school record.

Missing or mismatched documents can affect an applicant’s eligibility. On the Supporting Documents page, you must designate the following:

- Documents that will be accepted from applicants. In the Accept column, click the box to the left of each document type you will accept from each applicant. This “turns on” that document type and causes USA Staffing to create a folder for it. If you accept only the Resume, documents submitted through Application Manager or faxed will be categorized as a Resume, regardless of what they are. If you want Application Manager to provide different document types for applicants to differentiate their supporting documents, you must specify those document types as accepted.

- Documents that applicants will be required to submit. In the Req (Required) column, click the box to the right of each document type you will require from each applicant. This “turns on” that document type and causes USA Staffing to put the applicant record in PF status until all required forms are received.

- Page Limit. This limit applies to documents that are faxed in and does not affect uploaded documents.

  Note: If you elect not to require documents, the applicant status in Application Manager will show as Complete with the submission of the questionnaire only. The applicant status on USAJOBS will also be inaccurate.

HOT TIP! The Accepted checkbox does not control which documents applicants can upload and select in their USAJOBS account before completing their application in Application Manager. Applicants can submit documents from their USAJOBS account that are not marked as accepted in USA Staffing. Once these documents are submitted, they become part of the application record and are listed in the Applicants > Supporting Documents page.

Saving your work. The two ways to save your work are:

- Click the Save button and continue entering data in the supporting documents page.
- Click the Next button to save your work and continue to the Request Management Page.

Request Management

This page accommodates three end-to-end (E2E) tracking dates and provides a way to add and track Request for Personnel Action(s) [RPAs]/SF-52s within USA Staffing.

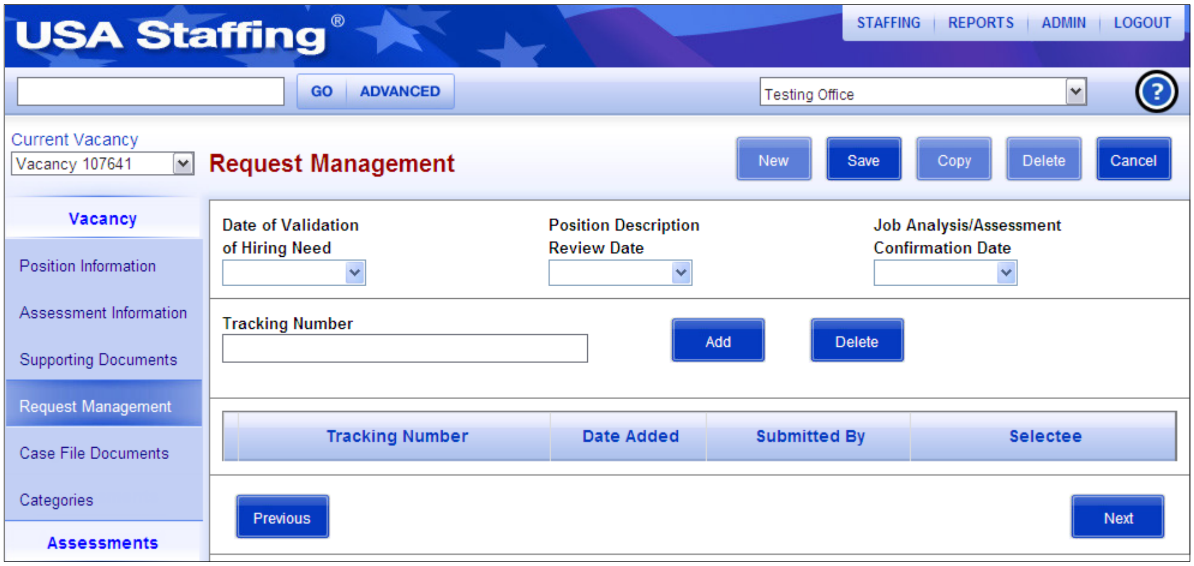
The following dates will be used in the calculations for the Hiring Timeliness reports as part of the end-to-end reporting:

- **Date of Validation of Hiring Need.** This is the date the need to hire is validated. This happens outside of the system when the hiring manager first establishes the need to fill the position and the vacant position is confirmed. This is considered the starting point of the 80-day time-to-hire calculation.
- **Position Description Review Date.** This is the date the review of the position description is completed for this hiring action.
- **Job Analysis/Assessment Confirmation Date.** This is the date the job analysis and assessment is confirmed for use with this job announcement.

On this page, you can add numbers generated by back-end personnel action processing systems to USA Staffing. By adding a tracking number at the vacancy level, connecting it to a request, and finally assigning it to a selectee, users will be able to track the progress of staffing actions through reports. Once the number is added, the system will populate the table with the following information:

- **Tracking Number –** as entered in the Tracking Number field. This field has a 30-character limit and allows letters, numbers, and symbols.
- **Date Added –** date and time the number was added to the system in MM/DD/YY HH:MM format.
- **Submitted By –** full name of USA Staffing user who added the number.

Once a Tracking Number is assigned to a selectee, the name will display in the Selectee field on this page.



To add a number, enter the number in the Tracking Number field and then click the Add button. Tracking Numbers must be unique within a Vacancy and across an Office. When a Tracking Number is entered, the system will check for an existing record. The following two scenarios are possible:

- **Record not found.** The tracking number is added to the table and tied to this VIN.
- **Record found/linked to another VIN.** The system will display a message indicating “This Tracking Number is already tied to another vacancy.”

To delete a Tracking Number, click anywhere on the row, then click the Delete button, and finally click the Save button. Once a number is added, it cannot be modified. If an erroneous Tracking Number is added, you will need to delete it and re-add it.

Note: To delete a Tracking Number that has been associated with a request or a selectee, users will need to delete the Tracking Number from the selectee’s entry on the Audit page first, then delete it on the Request Information page (if applicable), and finally delete it on the Request Management page.

Case File Documents

This page allows you to upload and manage case file documents, such as supporting assessment and rating materials, position descriptions, SF-52s/SF-39s, and other documentation to the Vacancy, Assessment, Announcement, Referral Request, and Certificate sections within a VIN. The Case File Docs icon, located on the left menu bar, displays the number of uploaded documents. You can click this icon from any section of the Staffing area to view the Case File Documents page. Once a document is added, the system populates the table with the following information:

- **File Name.** This is the name assigned to the document before being uploaded.
- **Linked To.** This is the VIN, assessment, announcement, request, or certificate to which the document is associated.
- **Added By.** This is the full name of the user who uploaded the case file document.
- **Date Added.** This is the date the case file document was uploaded to the system in MM/DD/YYYY format.
- **Notes.** The gray icon under this column indicates there are no notes entered for the case file document. Once a note is added, this icon will turn yellow.
- **Show in SM.** When this box is checked, the case file document and accompanying note(s) will display in Selection Manager.

- **Display Deleted.** For record purposes, deleted case file documents are retained in the system. When this box is checked, the system will display any deleted documents in the Case File table. The following three columns are added to the table to identify deleted documents:
    - Is Deleted? – Deleted documents are identified by a Yes.
    - Deleted By – This is the full name of the user who deleted the case file document.
    - Date Deleted – This is the date the case file document was deleted from the system in MM/DD/YYYY format.

To upload a case file document:

- Click the New button. The page will refresh and display the Upload New Case File Document form.
- Select the area from the Link New Case File Document to Area drop-down list. The options are: Vacancy, Assessment, Announcement, [Referral] Request, and Certificate.
- If uploading documents for the Assessment, Announcement, Request, and Certificate areas, a second drop-down list will display under the Link New Case File Document to Area drop-down list. If applicable, select the appropriate assessment, announcement, request, or certificate from the second drop-down list.
- Click the Browse button next to the Select File to Upload field. The file size must be 3MB or less and the acceptable formats are non-encrypted JPG, PDF, TXT, RTF, DOC, DOCX, and WPD. Once you have selected the file, it will appear in the Select File to Upload field.
- Click the Upload Document button.

To delete an uploaded case file document, select the case file document you want to delete by clicking anywhere on its row and click the Delete button.

To add notes to a case file document:

- Click the icon under the Notes column next to the case file document for which you want to enter notes. A Notes window opens.
- Click the New button.
- On the Add Note form, enter the Subject and Note text.
- Click the Save button. The note is added to the table. Once the note is saved, you can edit or delete it by clicking the note entry on the table.
- Click Close Window on the top right. The icon under the Notes column for that particular case file document will turn yellow, and the number of notes added will display in the icon.

Vacancy Category

To get to the Vacancy Category setup page, select Categories under Vacancy on the left menu bar. This page is only applicable when using the Category Rating process. Use this page to set up the category names and cut-off scores.

You can create a predefined Category Rating Set for your office and configure the system to use this predefined set as the default categories used in all Competitive vacancies. This configuration can be turned on or off in the Preferences section of the Administration area.

If a Category Rating Set is established and the configuration is turned on, the system will automatically populate the predefined categories on the Categories page for all vacancies marked as Competitive. You can modify the category titles and cut-off ratings for a specific vacancy if necessary. Changes made directly on the Categories page will not affect the Category Rating Set stored in the Administration area.

If no Category Rating Set is created on the Administration area or the configuration item for using the office category rating set is turned off, you may manually enter the category titles and cut-off ratings on this page.

Note: Once the announcement is marked as released to USAJOBS or Stored Lists/Certificates have been created, this page will become read-only and changes cannot be made.

To add a category:

- Click the New button.
- On the new row under the Title column, type the name of the category (for example, Best Qualified or Qualified).

- On the new row under the Cut-Off Rating column, type the numerical rating for that category. This is a numerical rating, not the raw score.

- Repeat these steps for each additional category.

To remove a category:

- Select the category to delete by clicking on the box to the left of the category you want to delete.

- Click the Delete button.

Check Your Skills – Create a Vacancy

Take 10 minutes to create a new vacancy by entering all the required information from the partially filled-out SF-52 found at the end of this exercise:

1. On the top navigation bar, click Staffing.
2. On the left menu bar, click the Vacancy button.
3. You will now be at the Advance Search screen. Click the New button.
4. Enter your vacancy's position title in the text entry box under Position Title.
5. Put a checkmark on Competitive by clicking on the box to the left of it.
6. Put a checkmark on Merit Promotion by clicking on the box to the left of it.
7. Select Federal as Employer Type.
8. Enter the Minimum Salary and Maximum Salary.
9. Click the Save button at the top of the page.
10. Write down your VIN: ____________________. You will use this VIN later on in this course.

Note: The Select Customer button will now be activated.

11. Click the Select Customer button. The Advanced Search screen will display.
12. Enter the customer's name you created in the previous exercise.
13. Click the Go button to conduct a partial search on the customer's name. You will see a list of the customers whose names match the name you entered.
14. Find your customer's name and click on the name.
15. You will navigate back to the Position Information page. If only one customer is found, it will automatically populate in your announcement.
16. If the correct customer is displayed, click the Next button to go to the next page and automatically save your work. You will be on the Assessment Info page.
17. Click the Next button. You will be on the Supporting Documents page.
18. Click to check the Accept boxes to the left of all types of documents.
19. Click the Save button.

Standard Form 52
Rev. 7/91
U.S. Office of Personnel Management
FPM Supp. 296-33, Subch. 3

REQUEST FOR PERSONNEL ACTION

PART A - Requesting Office ***(Also complete Part B, Items 1, 7-22, 32, 33, 36, and 39.)***

1. Actions Requested: Recruit - All Sources - 2 Vacancies
2. Request Number: 09-01234
3. For Additional Information Call *(Name and Telephone Number)*: Customer Contact
4. Proposed Effective Date: 01-01-10
5. Action Requested By *(Typed Name, Title, Signature, and Request Date)*: John Q. Manager, CTS/ASMG
6. Action Authorized by *(Typed Name, Title, Signature, and Concurrence Date)*: Susan Supervisor, CTS

PART B - For Preparation of SF 50 ***(Use only codes in FPM Supplement 292-1. Show all dates in month-day-year order.)***

1. Name *(Last, First, Middle)*
2. Social Security Number
3. Date of Birth
4. Effective Date

FIRST ACTION

5-A. Code | 5-B. Nature of Action
5-C. Code | 5-D. Legal Authority
5-E. Code | 5-F. Legal Authority

SECOND ACTION

6-A. Code | 6-B. Nature of Action
6-C. Code | 6-D. Legal Authority
6-E. Code | 6-F. Legal Authority

7. FROM: Position Title and Number
8. Pay Plan | 9. Occ. Code | 10. Grade or Level | 11. Step or Rate | 12. Total Salary | 13. Pay Basis
12A. Basic Pay | 12B. Locality Adj. | 12C. Adj. Basic Pay | 12D. Other Pay
14. Name and Location of Position's Organization

15. TO: Position Title and Number: Human Resources Specialist
16. Pay Plan: GS | 17. Occ. Code: 0201 | 18. Grade or Level: 9 | 19. Step or Rate | 20. Total Salary/Award | 21. Pay Basis
20A. Basic Pay | 20B. Locality Adj. | 20C. Adj. Basic Pay | 20D. Other Pay
22. Name and Location of Position's Organization: Insert your Agency "Customer" information

EMPLOYEE DATA

23. Veterans Preference: 1 - None; 2 - 5-Point; 3 - 10-Point/Disability; 4 - 10-Point/Compensable; 5 - 10-Point/Other; 6 - 10-Point/Compensable/30%
24. Tenure: 1 (0 - None; 1 - Permanent; 2 - Conditional; 3 - Indefinite)
25. Agency Use
26. Veterans Pref for RIF: YES / NO
27. FEGLI
28. Annuitant Indicator
29. Pay Rate Determinant
30. Retirement Plan
31. Service Comp. Date (Leave)
32. Work Schedule
33. Part-Time Hours Per Biweekly Pay Period

POSITION DATA

34. Position Occupied: 1 (1 - Competitive Service; 2 - Excepted Service; 3 - SES General; 4 - SES Career)
35. FLSA Category: N (E - Exempt; N - Nonexempt)
36. Appropriation Code
37. Bargaining Unit Status
38. Duty Station Code
39. Duty Station *(City - County - State or Overseas Location)*: Washington, DC
40. Agency Data | 41. | 42. | 43. | 44.
45. Educational Level | 46. Year Degree Attained | 47. Academic Discipline | 48. Functional Class | 49. Citizenship (1 - USA 8 - Other) | 50. Veterans Status | 51. Supervisory Status

PART C - Reviews and Approvals ***(Not to be used by requesting office.)***

1. Office/Function	Initials/Signature	Date	Office/Function	Initials/Signature	Date
A.			D.		
B.			E.		
C.			F.		

2. Approval: I certify that the information entered on this form is accurate and that the proposed action is in compliance with statutory and regulatory requirements.

Signature | Approval Date

CONTINUED ON REVERSE SIDE — OVER — Editions Prior to 7/91 Are Not Usable After 6/30/93
52-118 — NSN 7540-01-333-6239

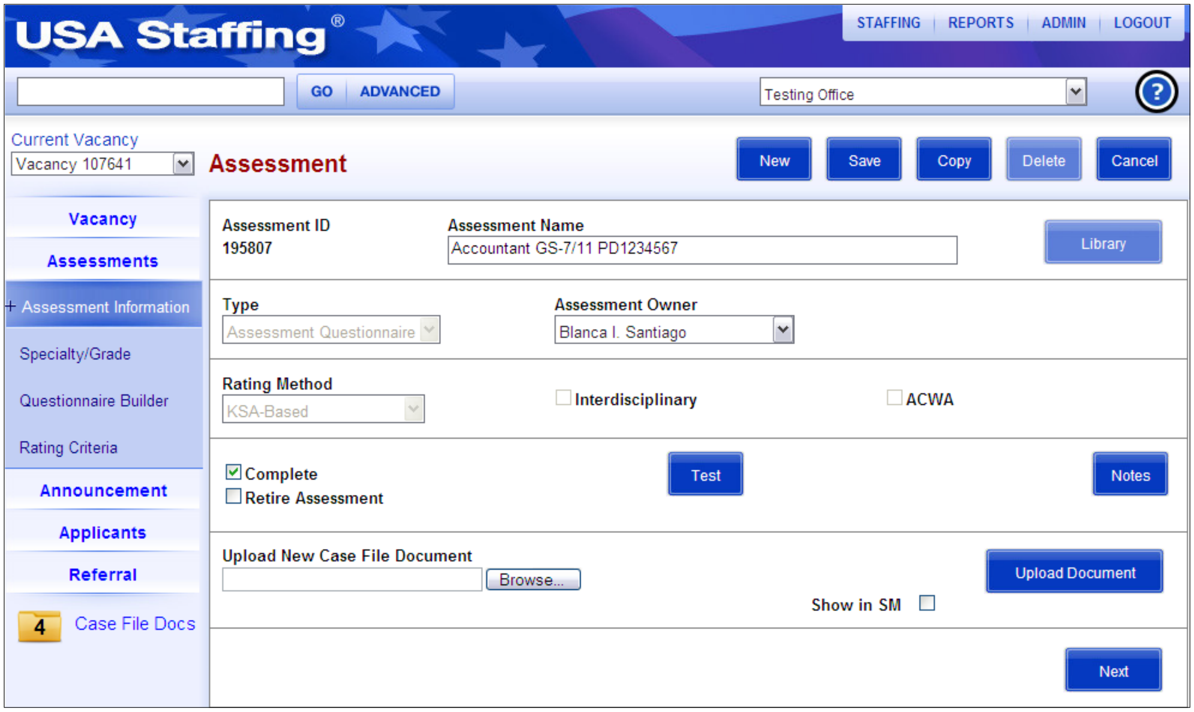
Assessment

- Creating an Assessment
- Building an Assessment from Scratch
- Source Information
- Specific Information
- Preparation
- History Information
- Specialty/Grade
- Questionnaire Builder
- Library
- Import Document
- Rating Criteria
- Apply Values To
- Test Assessment
- Assessment

After creating the vacancy, an assessment must be created or attached.

Assessments are ways of measuring an applicant's qualifications to perform the job. The Assessment section allows you to define and create an assessment tool that the system will use to rate applicants.

The following Assessment screen displays the Vacancy Identification Number (VIN) on the Current Vacancy field. Any assessment type developed or attached is linked to this Vacancy.



Creating an Assessment

If you are in the process of establishing a vacancy and you click the Next button on either the Case File Documents page or Categories page, the system will automatically direct you to the Assessment Information page. Here you begin the process of developing your assessment.

HOT TIP! Ensure you are on the correct VIN before you begin the assessment development process. The 6-digit VIN must be displayed in the Current Vacancy field on the upper left-hand corner of the screen.

The three ways in which you can create or attach a new assessment are to:

- Build an assessment from scratch.
- Use an Import document.
- Use an assessment from the Library.

Building an Assessment from Scratch

On the Assessment Information page you will need to provide the following information:

- **Assessment Name.** Give the assessment a unique name, up to 30 characters in length. Information you may want to incorporate into the name may include series, grade, Position Description (PD) number, or other information specific to this position. Contact your OA for naming convention guidelines.

- **Type.** Select the type of assessment from the drop-down list. The system defaults to Assessment Questionnaire. Other commonly used assessment types include written tests, customized processes, manual ratings, and structured interviews. For this example we are going to use Assessment Questionnaire.

- **Assessment Owner.** This drop-down list initially shows the user who creates the assessment in the vacancy or selects an assessment from the library. If appropriate, another user can be designated as the owner by selecting his or her name from the list. This is used for work ownership tracking and reporting purposes.

- **Rating Method.** Select the rating method from the drop-down list. Your choices include the following:

    - **KSA-Based –** Examining procedure based on evaluation of the most relevant and measurable knowledge, skills, and abilities or competencies. These are scored based on answers to relevant benchmark questions and responses for each KSA/factor. Scoring is based on the sum of the factor values (the average of the response values, total response points divided by the number questions, for each factor) and transmuting the score from 70 to 100 if needed.

    - **A-C-E (Rating Method III) –** Traditional rating process with 10-point quality levels (70, 80, and 90) assigned based on the applicant's overall qualifications for the position. Additional points up to 9 for the first two levels and 10 for the last can be added based on specific items such as education and additional specialized experience.

    - **Task-Based –** Examining procedure for determining minimum qualifications and ranking based on the total of all the benchmark/question response values. The total response values are transmuted from 70 to 100 if needed.

    - **Job Element –** Examining procedure for blue collar (wage grade) positions based on prescribed job elements for the position. The scoring is structured to require an average factor value of at least 2 points for all job elements. In addition, it is structured to require 2 points or higher for the mandatory screen-out element. Scoring scale is fixed from 0 to 4 points for response values.

    - **Written Test –** Scoring based on a written test alone or in combination with one of the methods above to determine minimum qualifications.

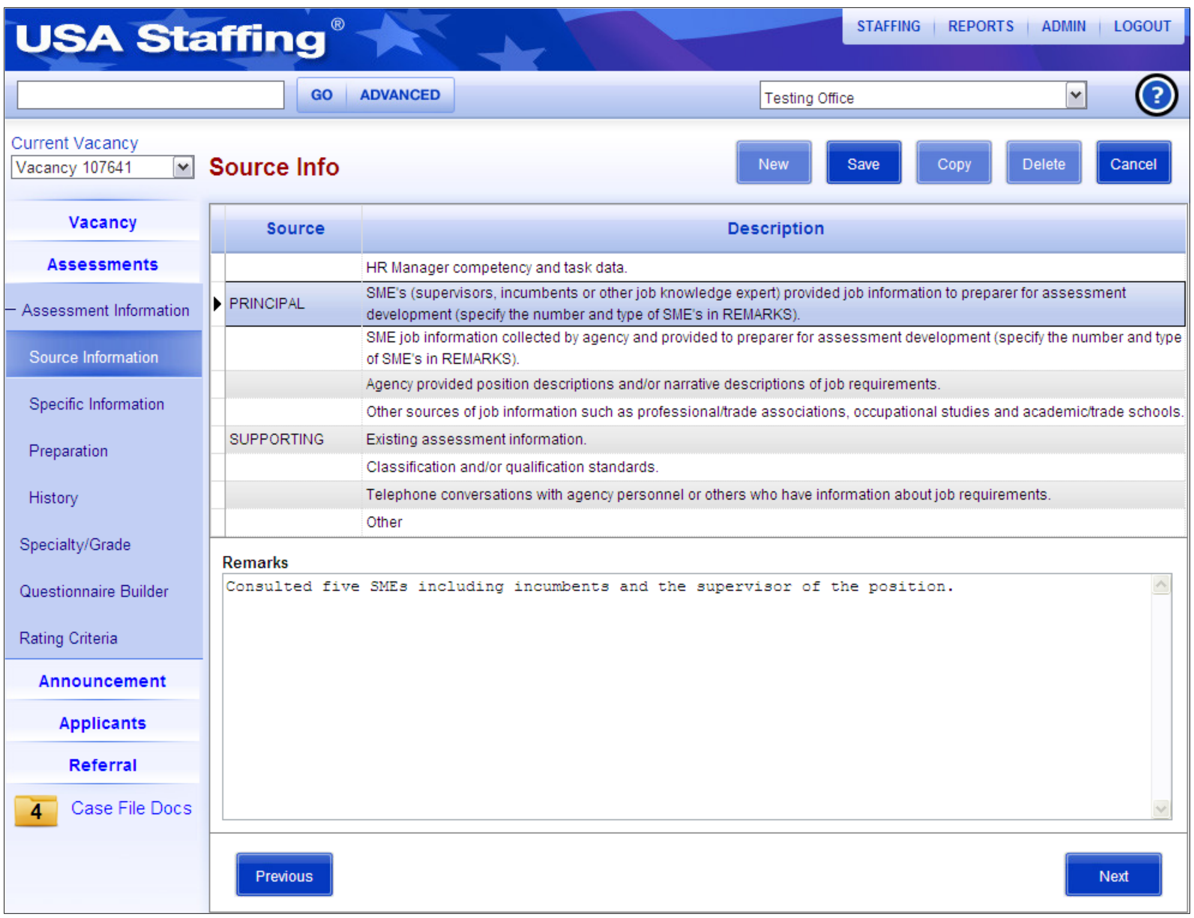
HOT TIP! The Upload New Case File Document section allows you to upload case file documents for an assessment; for example, a position description or job analysis. Documents uploaded here are listed in the Vacancy > Case File Documents page and will undergo a virus scan.

- Click the Next button for the Source Information page.

Source Information

The Source Information page is where you document the sources (principal or supporting) used to develop the assessment, and how they are used. Accurate documentation is important to demonstrate the validity of the assessment. At least one principal source must be identified. To enter a source, follow these steps:

- Click the applicable description row.
- Select either Principal or Supporting on the Source drop-down list.
- Add documentation notes in the Remarks box for the Source selected.
- To view or modify the notes, you must select the Source by clicking on its row.

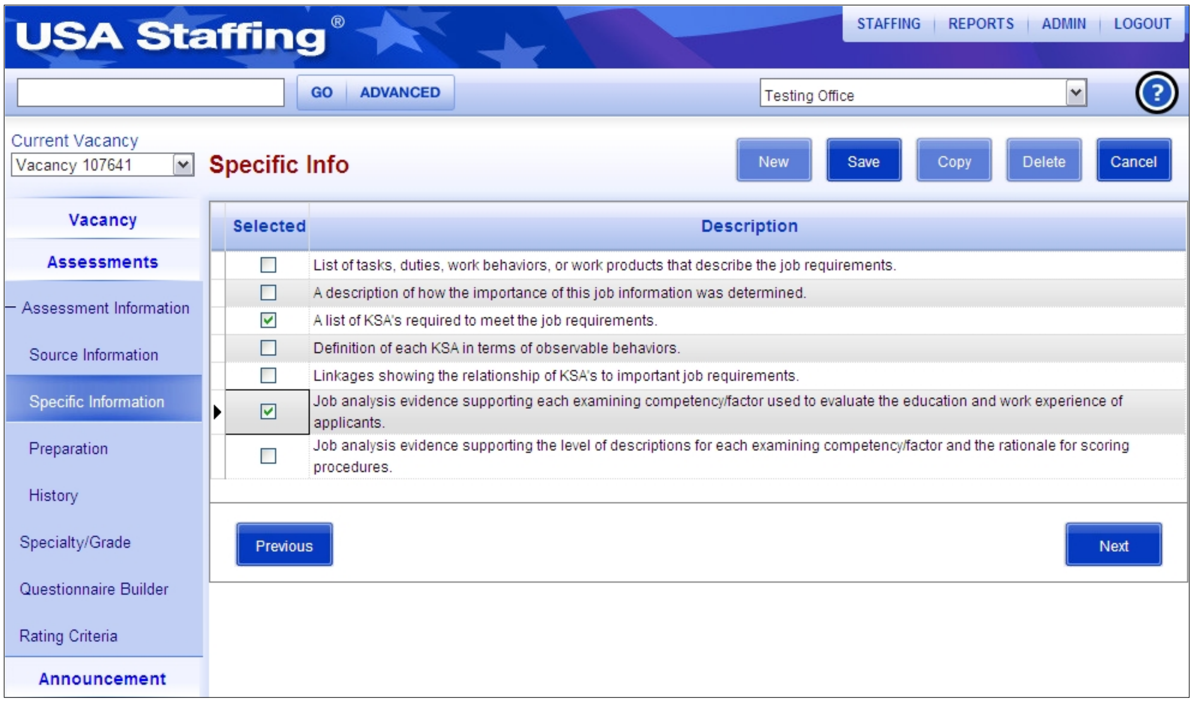


- Click the Next button for the Specific Information page.

Specific Information

The Specific Information page is additional documentation of the sources used to develop the assessment. Accurate documentation is important to demonstrate the validity of the assessment.

- Click the box to the left of each item that describes a source of information you used to develop the assessment.

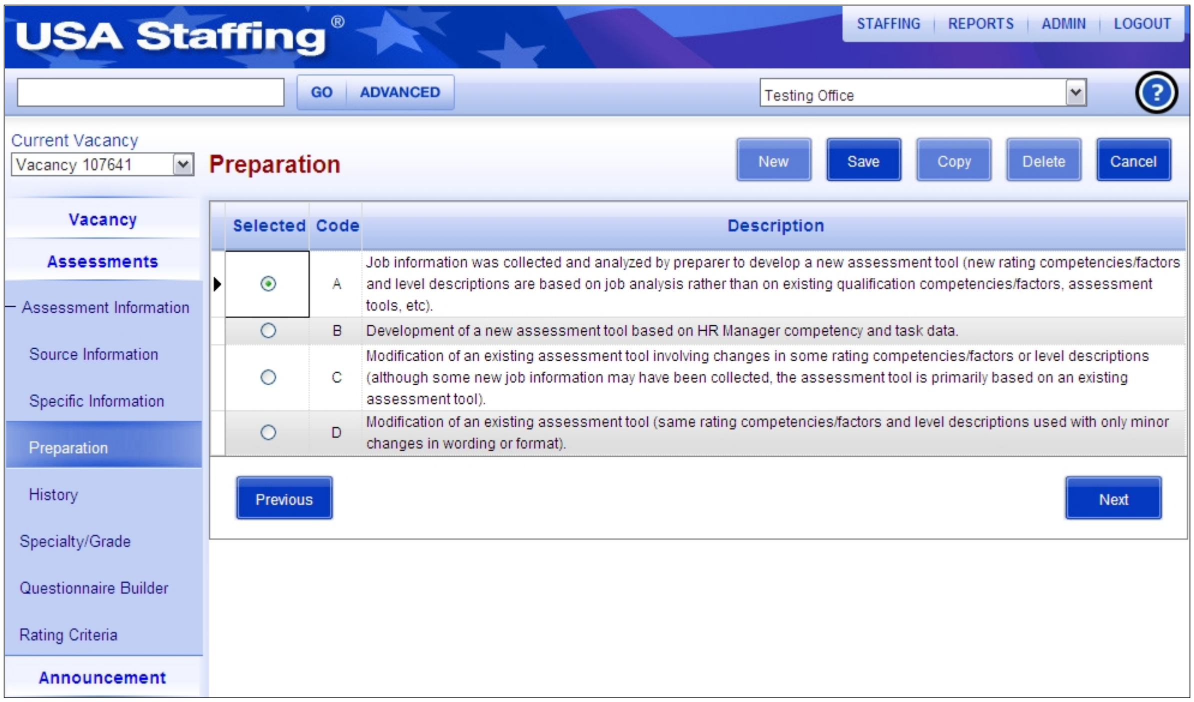


- Click the Next button for the Preparation page.

Preparation

The Preparation page is an additional place to document the sources used to develop the assessment. Accurate documentation is important to demonstrate the validity of the assessment.

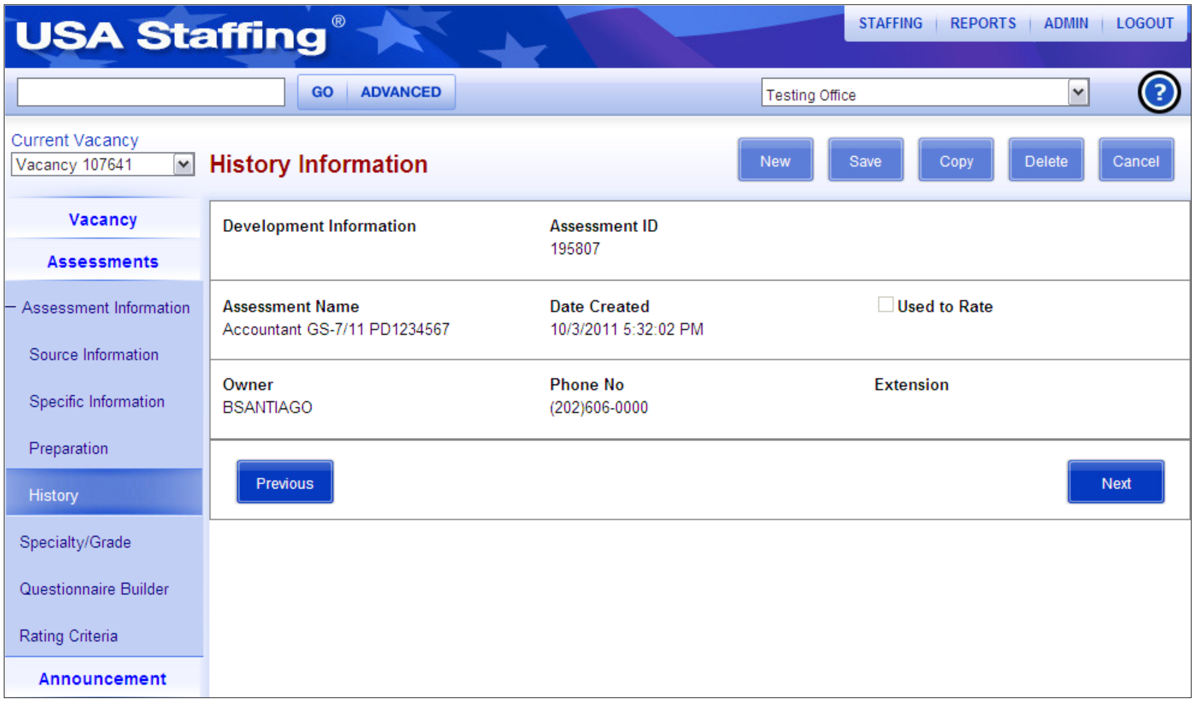
- Click the radio button to the left of the item that best describes the source information used to develop the assessment.



- Click the Next button for the History Information page.

History Information

The History Information page displays the assessment Development Information, including: Assessment ID, Name, Date Created, and the Owner.

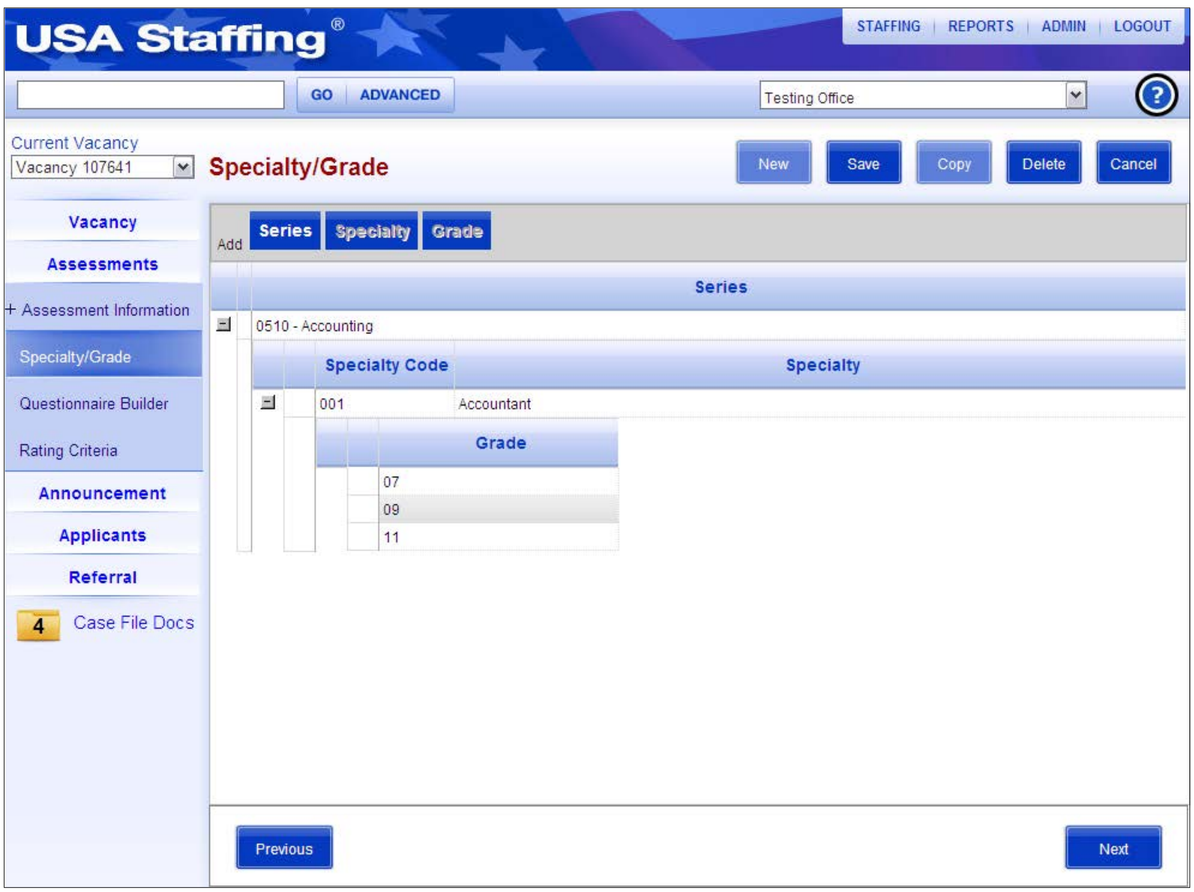


- Click the Next button for the Specialty/Grade page.

Specialty/Grade

Add the series, specialty, and grade following these steps:

- Click the Series button and select a series from the drop-down list.
- Click the Specialty button and type the specialty name. If you have more than one specialty, click the button again to add more specialties. Specialty codes are system generated but can be changed.
- Click the Grade button and enter a grade. Click the Grade button again to add additional grades for the specialty. To add a grade for a different specialty, select the specialty and click the Grade button.



- Click the Save button. The page will refresh and the Specialty and Grade view will collapse under the Series. Click the plus signs to view the Specialty and Grade.

  Note: You must have entered at least one grade and have a complete set of Series + Specialty + Grade in order for your record to be saved.

- Click the Next button for the Questionnaire Builder page.

Questionnaire Builder

Use the Questionnaire Builder page to develop instructions, questions, and responses for your assessment. The assessment questionnaire appears in the Online Application when applicants apply via USAJOBS. You also have the option to link a printable version of the questionnaire to your announcement.

The Questionnaire Builder page is pictured below as it would first appear. You can use the controls on the bottom of the page to take the following actions:

- The **Import Document** button allows you to import an existing questionnaire text file into USA Staffing.
- The **Preview** button allows you to preview the questionnaire.
- The **Add Factor** button allows you to add a competency or KSA. The factor text field has a 100-character limit.
- The **Add Item** button allows you to add instructions, questions and their associated response options, default scales, or narrative text response boxes.
- The **HR Manager** button provides access to a resource that can assist you in identifying appropriate competencies, tasks, benchmarks, and questions for selected occupations and series.

These are the steps to build a questionnaire from scratch:

- To add a factor:
  - Click the Add Factor button. This takes you to the Competency/Factor page, and adds a new row to the table.
  - Click in the new row under Competency/Factor and type in the name of the factor.

HOT TIP! A factor is the name of a competency, a KSA (knowledge, skill, or ability), or a job element. In most cases, questionnaires use questions that relate to factors to show their relation to the job. Factor names do not appear in the actual questionnaire, but it is possible to make them appear by including the text as an instruction.

Example: FACTOR: MINIMUM QUALIFICATIONS

- To add more factors while you are on the Competency/Factor page, click the New button.
- When you are finished adding factors, click the Save button. You will be redirected to the Questionnaire Builder page as shown below.

- To add an item:
  - Click the small box to the left of the Competency/Factor that you would like to add an item. The arrow will display next to that Competency/Factor to indicate it is selected.
  - Click the Add Item button. You will be directed to the Item Editor page. The factor to which you are adding will display in the upper right corner of the page.

HOT TIP! An item is a question (including self-report response options), a set of instructions, a default scale, or a narrative text box that can be placed in the questionnaire. An item is always associated with a specific factor.

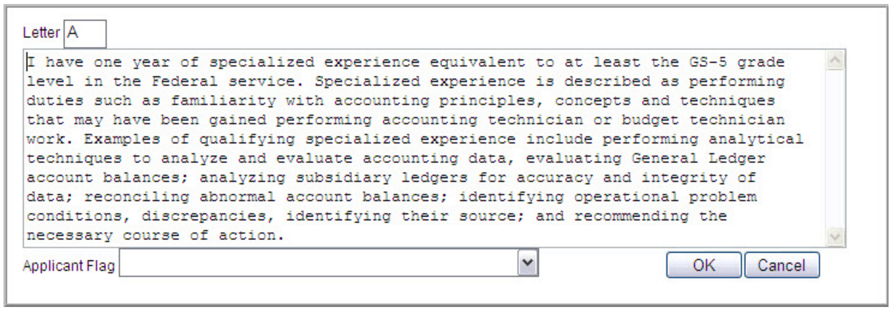
  - Use the Description drop-down list (upper left of page) to select the item you want to add. The items available are:
    - **Questions –** multiple-choice items from which system-generated scores may be derived. If a factor is to be scored, it must contain at least one question. Responses to these questions may be created manually by the user when custom text is needed (as is the case for minimum qualification and/or selective factor responses) or standard default scales can be pulled in from the system (these are the most commonly used with rating factors).
    - **Instructions –** can be inserted at any point in the questionnaire and provide guidance or clarification to the applicant.
    - **Narrative –** can be used in combination with questions to collect written information about the applicant's qualifications.
    - **Default Scales –** a set of stored responses that can be used and applied to multiple questions throughout the assessment; typically used as responses for rating items.

To add a question with a customized response:

- On the Item Editor page, under the Description box use the drop-down arrow and select Question.
- Enter the question in the text box.

Note: If you click the Save button after entering your question text, the page will return to the Questionnaire Builder, which will have a plus sign next to the factor where the question was added.

- On the Item Editor page, under the Question Type box the system will default to Allow Single Response Selection. .Click the New button below the text box to add custom responses.



- In the Response box, enter a customized response for A. Click OK.

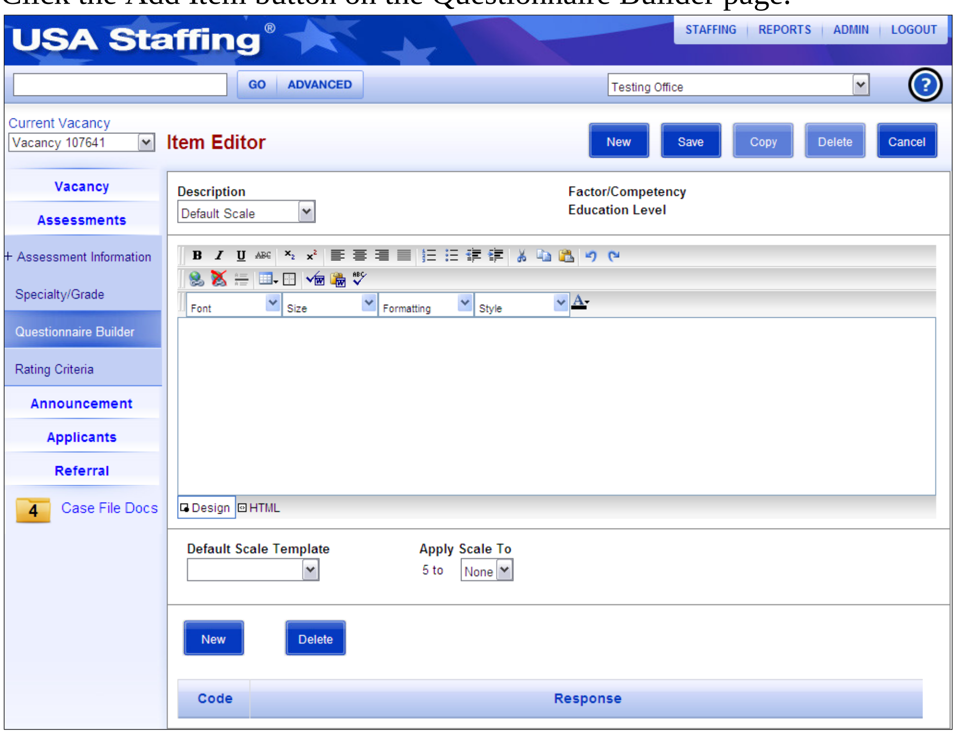
- Repeat the two previous steps to add additional customized responses. The system will automatically assign letters to your responses.

- Click the Save button.

  Note: Whenever you click the Save button on the Item Editor page, the system returns to the Questionnaire Builder page.

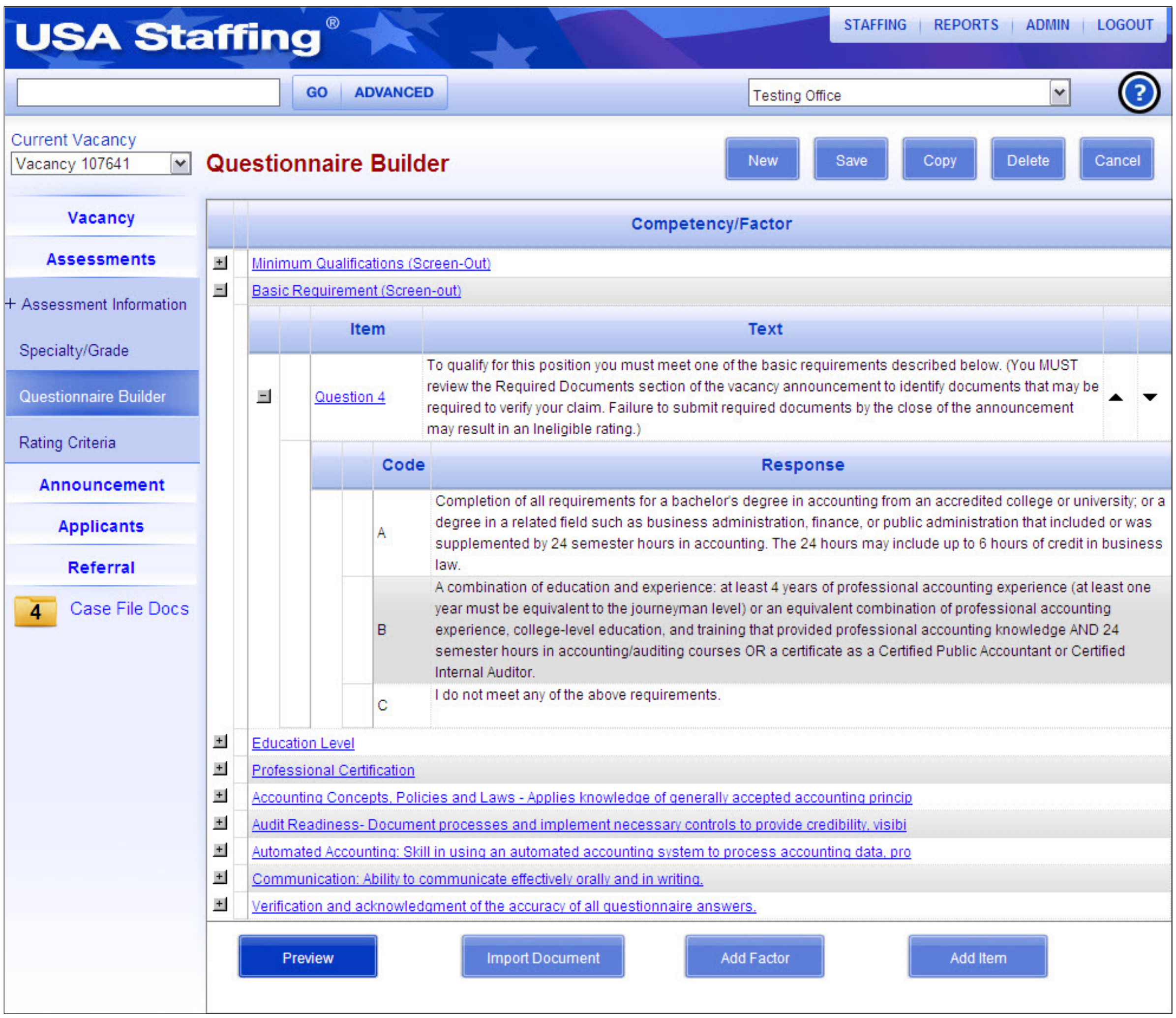
To insert a Default Scale in the questionnaire, follow these steps:

- Click the Add Item button on the Questionnaire Builder page.



- On the Item Editor page, select Default Scale from the Description drop-down list.
- Select the Default Scale Template from the drop-down list. Once the Default Scale is selected, the page will refresh.
- Click the Save button.

The picture below is the Questionnaire Builder page with some added factors and items. On this screen, the plus signs have been clicked to show the items associated with the second factor and the responses associated with the fourth question.



You will then be required to assign rating criteria to your assessment. However, before moving on to the next step, the following two methods are alternative ways to create an Assessment Questionnaire:

- Select and use an assessment from the library.
- Import a document.

Library

On the Assessment Information page, you can create a new assessment or you can click the Library button to search for an existing assessment.

The Assessment Library is comprised of assessments created by users in your Organization or Office. You can save time by using an assessment from the Library. You must ensure that the assessment is appropriate for the series, specialty, and grade you are working on, and that you modify the assessment as needed.

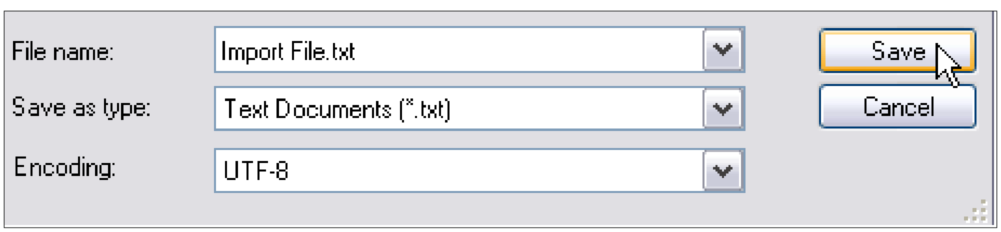
Import Document

You can import a text file of the assessment questionnaire into the Questionnaire Builder. Here are some uses for this feature:

- You can import assessment tools already developed in USA Staffing that you may want to modify.
- If you prefer to work in your favorite word processor, you can create the questionnaire there.
- Members of your team can draft questionnaires in this format even if they do not have access to USA Staffing.

To use the Import Document function, you must follow these guidelines:

- The questionnaire to be imported must be saved in a plain text file format (.txt) with UTF-8 encoding.



- Each part of your questionnaire text document must be preceded by an identifier so USA Staffing knows what it is:
    - o Competency/Factor. Precede each one with FACTOR:
    - o Instructions. Precede each set of instructions with INSTRUCTIONS:
    - o Default Scales. For each item in your default scales (your A–E responses), use a capital letter followed immediately by a dash, then one or more spaces and the text of the item.
        - Example: A- I have never done this.

- o Question Type Items. Precede each question item with a number followed immediately by a period, then one or more spaces and the text.

  - Example: 6. Integrate the fundamental principles of applied ecological and earth sciences.

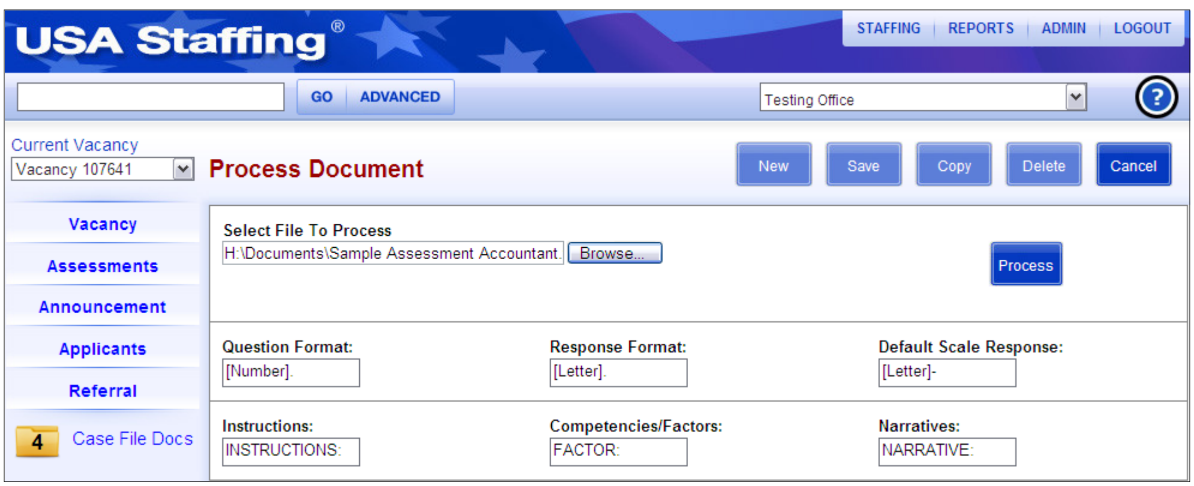
- o Responses. Precede each response item with a capital letter followed immediately by a period, then one or more spaces and the response text.

  - Example: C. I have a combination of appropriate specialized experience as described in "A" and graduate level education as described in "B" above which equal 100% of the requirement. Submit a copy of your college transcripts.

To import a document, follow these steps:

- Click the Import Document button at the bottom of the Questionnaire Builder page to display the Process Document page.

- In the text entry box under Select File To Process, either type the full path and file name or navigate to the file using the Browse button. (See a sample text file in Appendix B.)



- Click the Process button. The document file will be loaded into the Questionnaire Builder. The Questionnaire Builder page will be presented for your review.

- Click the Save button.

If you need to, continue to work in the Questionnaire Builder as described above.

- Click the Next button to go to the Rating Criteria page and assign the Rating Criteria to the assessment.

Rating Criteria

The Rating Criteria page is where you set up how each possible applicant response on the questionnaire will be treated by USA Staffing in the rating process.

Below is a discussion of how you can use the settings on the Rating Criteria page on the Assessment menu to set up Screen-Out and Rating Factors in the system.

Screen-Out Factor. A Screen-Out Factor is used to determine basic eligibility. If the applicant does not meet this basic factor, the applicant is “screened out” from being considered further for the job.

In most General Schedule (GS) occupations, you would use one or more Screen-Out Factors to determine whether the applicants meet the minimum qualification requirements. Selective factors (additional eligibility requirements for the job) are also used as Screen-Out Factors.

If you set a factor to be a Screen-Out, you must also set a Minimum Qualifying Value, which is the lowest number of points an applicant can receive on that factor and still be considered eligible. The Minimum Qualifying Value is the average of all the applicant’s response values for all questions under the factor. You also need to specify the ineligible code that the system will assign to the applicant record and show on the Notice of Results for an applicant who scores below the Screen-Out Minimum Qualifying Value.

In wage grade jobs (or where Job Element Examining is the method used to rate), you would set up one or more Screen-Out Factors to determine if applicants pass or fail the Screen-Out element of the Job Element rating plan. Normally, the Screen-Out Factor is the “Ability to Perform the Duties of the Position Without More than Normal Supervision.” In Job Element Examining, screen-out factors are also used as Rating Factors.

Rating Factor. A Rating Factor is one whose points are used to arrive at the applicant’s score. Each possible response to the questions associated with the factor has a point value.

EXAMPLE:

- Establish a scale of five possible responses.
- Set the point values in a range from 0 to 4.

Screen-Out and Rating Factors. If you set a factor for Screen-Out and for Rating, USA Staffing will take both of the following actions:

- Use the factor to determine if the applicant is eligible based upon meeting the Minimum Qualifying Value.
- Use the point value for each response to questions associated with the factor in arriving at the applicant’s score if eligible.

Screen-Out Factors, Not for Rating. When you set a factor for Screen-Out but not for Rating, USA Staffing will use the results of the question only to determine if minimum qualifications have been met. However, the system will not include the points as part of the applicant's score.

Multiple Questions in Screen-Out Factors. When you have multiple questions associated with a Screen-Out Factor, the points from the applicant's responses are averaged. If this average exceeds the Minimum Qualifying Value, the applicant is not screened out even if one or more responses may be below the minimum score.

It is useful to have multiple questions that address different aspects of a factor.

One-Grade Example. For a professional position at the GS-9 level, an applicant needs to possess certain basic educational background (i.e., a degree in a specified field, or a specified number of semester or quarter hours, etc.) and additional education or experience or a combination of both. You could do the following:

- Set the Factor to be a Screen-Out Factor.
- Set the Minimum Qualifying Value to 2.
- Ask two Yes/No questions:
    - Do you have this type of education?
    - Do you have this type of additional education or experience or a combination of education/experience?
    - Set the value of a Yes response to 2 and the value of a No response to 0.
- In this case, these are the four possible outcomes based on an applicant's responses. They are shown in the following graphic.

Possible Outcomes	Responses to Questions					
	Basic Education	Value	Specialized Experience	Value	Total	Average
Case No. 1	Yes	2	Yes	2	4	2
Case No. 2	Yes	2	No	0	2	1
Case No. 3	No	0	Yes	2	2	1
Case No. 4	No	0	No	0	0	0

FORMULA

A Minimum Qualifying Value of (2) × the number of questions under that Factor = the response value needed to qualify.

For example: 2 × 2 questions = a response value of 4. The 4 would be assigned to each qualifying response under that factor.

Note: In this example the applicant must answer Yes to both questions to qualify.

Two-Grade Example. For a professional position at the GS-9/11 level, an applicant must possess certain basic educational background (i.e., a degree in a specified field, or a specified number of semester or quarter hours, etc.) and additional specialized education or experience or a combination of both for the grade levels. You could do the following:

- Set the first factor to be a Screen-Out Factor.
    - Set the Minimum Qualifying Value to 2.
- Create a Basic Qualification – Education Yes/No question:
    - Do you have this type of education?
    - Set the value of a Yes response to 2 and the value of a No response to 0 for both grades.
- Create a second factor to be a Screen-Out Factor.
- Create two Additional Qualification factors – Education/Experience Yes/No questions (one for each grade level).
    - Do you have this type of additional education or experience or a combination of education/experience?
    - Do you have this type of additional education or experience or a combination of education/experience?
    - Set the value of a Yes response to 4 and the value of a No response to 0 for GS-9 for questions 2 and 3.
    - Set the value of a Yes response to 4 and the value of a No response to 0 for GS-11 for question 3 only.

FACTOR 2 – SCREENOUT		
Questions	**GS-9**	**GS-11**
	Response/Value	Response/Value
Q. 2. GS-9 Additional Education/ Experience/Combo	Yes = 4 No = 0	Yes = 0 No = 0
Q. 3. GS-11 Additional Education/ Experience/Combo	Yes = 4 No = 0	Yes = 4 No = 0

In this case, these are the four possible outcomes based on an applicant's responses:

Possible Outcomes	Responses to Questions									
	Factor 1				Factor 2					
	Q. 1. Education	Value	Total	Average	Q. 2. GS-9 Additional Education/ Experience/ Combo	Value	Q. 3. GS-11 Additional Education/ Experience / Combo	Value	Total	Average
Case No. 1	Yes	2	2	2	Yes	4	No	0	4	2
Case No. 2	Yes	2	2	2	Yes	4	Yes	4	8	4
Case No. 3	No	0	0	0	No	0	Yes	4	4	2
Case No. 4	No	0	0	0	No	0	No	0	0	0

FORMULA

A Minimum Qualifying Value of (2) × the number of questions under that Factor = the response value needed to qualify.

For the above example, the Minimum Qualifying Value for Factor 1 has been set to 2 and is applied to both grades. To pass this screen-out, the applicant must answer Yes.

The Minimum Qualifying Value for Factor 2 has been set at 2 for both grade levels. In this example, the qualifying response values have been set at 4 for question 2 and at 0 for question 3 to qualify for a grade GS-9. The response values have been set at 4 for question 2 and 4 for question 3 to qualify for a grade GS-11.

If the applicant answers Yes to question 2 and No to question 3, the applicant would pass the screen-out at the GS-9 level. If the applicant answers Yes to question 2 and Yes to question 3, the applicant would pass the screen-out at the GS-9 and GS-11 levels. If the applicant answers No to question 2 and Yes to question 3, the applicant would also pass the screen-out at the GS-9 and GS-11 levels. Therefore, to pass the screen-outs at the GS-9 and GS-11 levels, the applicant must answer Yes to question 1 and answer Yes to question 2 or 3 to qualify at the GS-9 level, and answer Yes to question 1 and answer Yes to question 3 to qualify at the GS-11 level.

In other words, an applicant who is qualified at the GS-11 level based on the response to question 3 also will qualify for the GS-9.

The Rating Criteria page has two views, depending on whether you prefer to see all the information grouped by Specialty or by Competency/Factor. By default, when you get to the Rating Criteria page, information is grouped by Specialty. The screen shot below shows the Rating Criteria page with one specialty and one grade.

Regardless of the view you select, there are three actions you can take on this page:

- Enter appropriate values for Used, Rating, Screen-Out, Minimum Qualifying Score, and Ineligible Code.
- Enter the appropriate point values for each of the responses to the questions.
- Test the assessment component.

To view the Rating Criteria information for a Competency/Factor, click the plus sign.

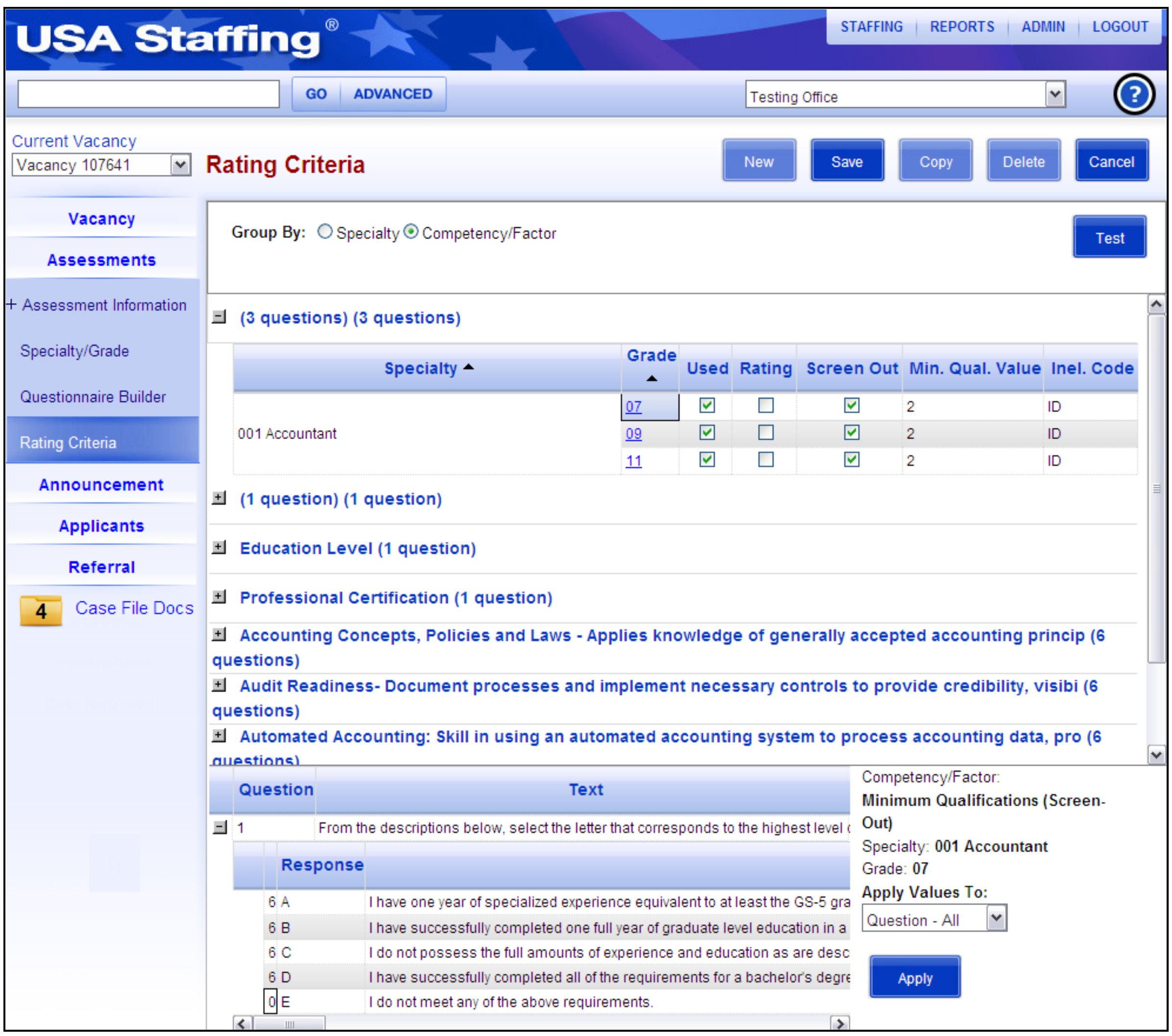
These are the steps to take on the Rating Criteria page. Enter appropriate values for the items on the first row of the table, which is your first Specialty/Grade combination:

- The system puts a check in the Used box by default to indicate that the factor is going to be used as part of the assessment process. If you want to prevent the factor from being used for a certain factor/specialty/grade combination to assess applicants, click this box to remove the check and turn off the factor.
- The system puts a check in the Rating box by default to indicate that the factor is going to be used as part of the numeric score.

- Click to place a check in the Screen Out box if the factor will be used as a screen-out in the assessment. If this box is checked, you must also supply a value in the Min. Qual. (Minimum Qualifying) Value box and an Inel. (Ineligible) Code. In most cases, when the Screen Out box is checked, the Rating check is removed; one exception to this is the Job Element assessment type.

- In the Min. Qual. Value column, enter the number of points an applicant must attain on this factor to pass the Screen-Out. Below this number, the applicant will be considered ineligible. To specify a minimum qualifying value, first make sure there is a checkmark in the Screen Out box, and then click the Min. Qual. box and type a number.

- In the Inel. Code column, select from the drop-down list the code you want the system to assign, when an applicant is ineligible, because they failed the Screen-Out Factor. To do this, make sure there is a checkmark in the Screen Out box and a number in the Min. Qual. Value box. Then click the Inel. Code box. When the drop-down selection arrow appears, use it to find the appropriate code and click it. (See Appendix C for a list of NOR Message Codes.)



For every question in the questionnaire, make an entry in the Value box that represents the number of points you want the system to assign to each possible applicant response for the grade you are doing.

To do this, follow these numbered steps:

1. Click the plus sign to fully expand the tree view for the factor/specialty/grade on which you are working.

2. Click the first factor for the grade.

3. Click the plus sign next to the question for which you want to assign point values.

4. Click the Value box and type in the number of points.

5. Click the Save button.

Repeat these steps for all responses for all questions for the factor/specialty/grade on which you are working.

Repeat steps 1–3 for each grade covered by the questionnaire. Do one grade at a time and save.

Select the next factor and repeat steps 1–4 for each factor.

Apply Values To

To speed up the process of completing the Rating Criteria page, the following alternatives are available at the Apply Values To drop-down list:

- **Question – Grade**. This will apply the response values for this question only at this grade level.

- **Question – All**. This will apply the response values for this question at all grades and specialties to which this question is linked.

- **Scale – Grade**. This will apply the response values in this default scale to every question using this scale at this grade.

- **Scale – All**. This will apply the response values in this default scale to all questions that use this scale for all specialties and grades.

To use one of the alternatives, follow these steps:

- Click the question with the response value that you want to apply.
- Ensure the last value is selected.
- Select one of the options from the Apply Values To drop-down list at the bottom right of the page.
- Click the Apply button.

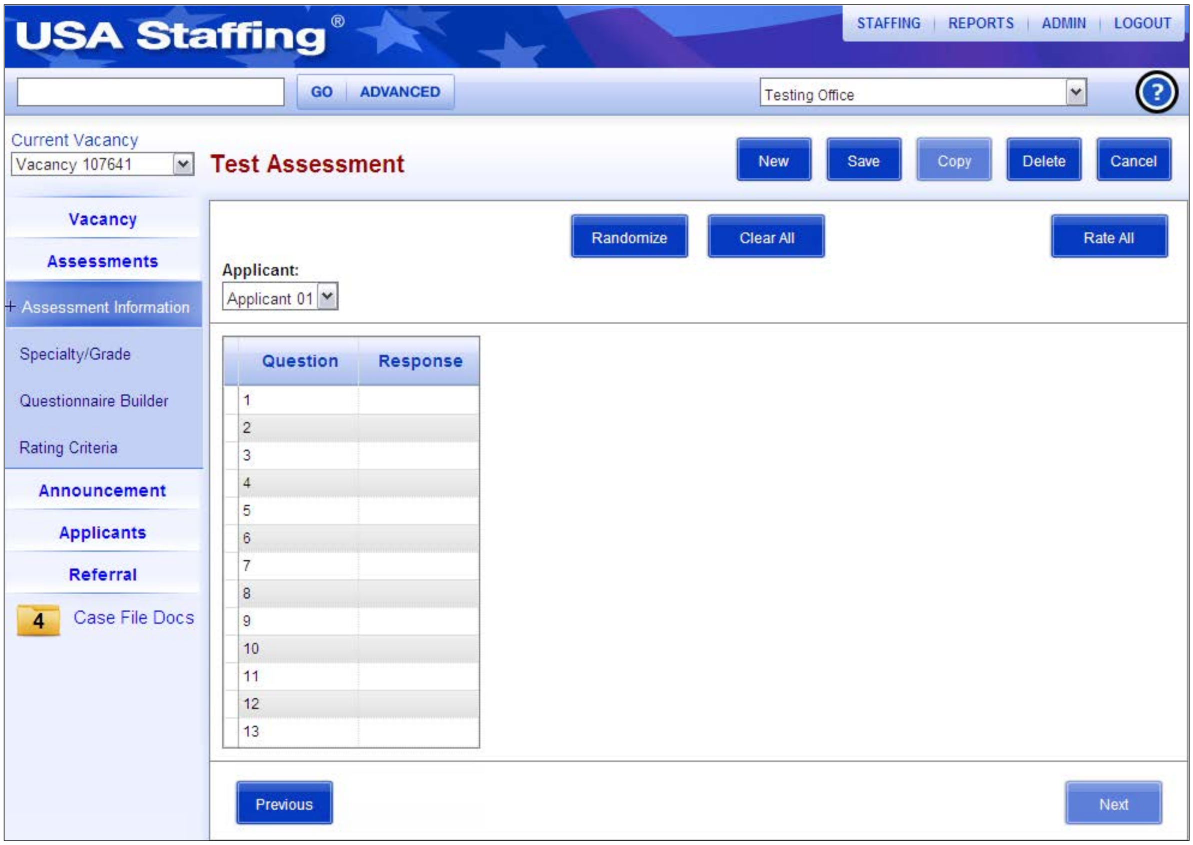
- When you finish entering the rating criteria for all the factors, test your Rating Criteria by clicking the Test button at the top of the page.

Test Assessment

The Assessment must be tested and verified before applicants can be rated and your announcement released to USAJOBS. In this process, you will create test applicants and questionnaire responses to confirm that the screen-outs and rating questions are working as expected.

The questions in the Test Assessment table correspond directly to the questions in your assessment. If you created 15 questions in your assessment, you will see 1–15 in the Question column. Keep in mind, if the first question in your assessment is the minimum qualification question, you will enter the letter of a qualifying or disqualifying response for that question.

The Test Assessment page is shown below.

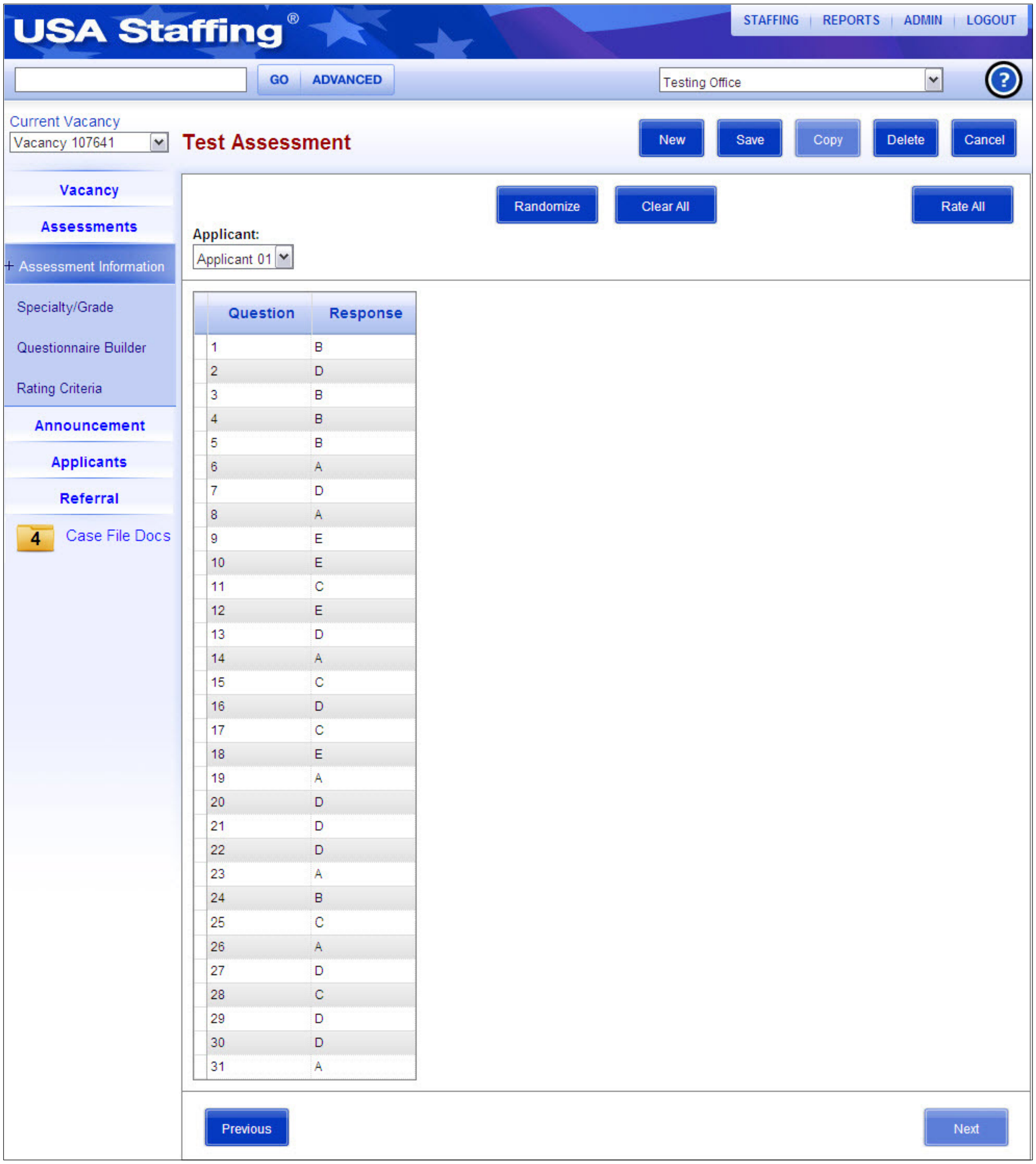


Follow these steps to complete the test process:

- Enter lettered responses in the Response column for Applicant 01. You can type these one at a time, or you can click the Randomize button to have the system generate responses for you.
- You will want to create a test applicant for each screen-out response scenario. For example, if your assessment is for grades 9 and 11, you can create a test applicant that should be rated eligible for the 9 and ineligible for the 11, a test applicant that is eligible for the 9 and the 11, and a test applicant that is ineligible for the 9 and the 11.

Keep in mind, if the Randomize feature is used, responses are randomly generated for that test applicant. You may change screen-out responses to ensure you have a test applicant for each of the grade level scenarios as outlined above.

A completed test applicant is shown below.



- Click the New button to add additional test applicants. Enter the responses as appropriate. You can switch from one applicant to another by using the Applicant drop-down list.
- Click the Rate All button. USA Staffing will rate your test applicants and create a Test Rating Summary Report. The report will preview in a separate window.

  Note: If you do not see the report preview open, look for it on the desktop toolbar.

Below are examples of two Rating Summary Reports.

Testing Office

TEST RATING SUMMARY REPORT

Assessment ID: 195807
Assessment Name: Accountant GS-7/11 PD1234567
Rating Method: KSA-Based

SSN	Name
000-00-01	Applicant 01

Specialty Code	Grade	Raw Score	Final Rating	Min Quals Rating
001	07	9	87	EL
001	09	11	87	EL
001	11	9	87	EL

SSN	Name
000-00-02	Applicant 02

Specialty Code	Grade	Raw Score	Final Rating	Min Quals Rating
001	07	0		IE
001	09	0		ID
001	11	0		ID

SSN	Name
000-00-03	Applicant 03

Specialty Code	Grade	Raw Score	Final Rating	Min Quals Rating
001	07	0		IE
001	09	0		IE
001	11	0		ID

Review test applicant ratings to ensure the assessment is working as expected, by answering the following questions:

- Are applicants rated eligible or ineligible as expected?
- Are eligible applicants given scores appropriate to their responses? If not, return to the Rating Criteria page, correct the response values, and re-test the assessment.
- When you are satisfied that the test has run successfully, close the preview screen and click the Next button. You will receive the dialogue box below.

Message from webpage

Mark this Assessment Complete?
Click OK if Test applicants rated correctly.

Warning: This test does not assure that the
rating criteria for this assessment is set up properly.
Users should confirm the accuracy of this test before proceeding.

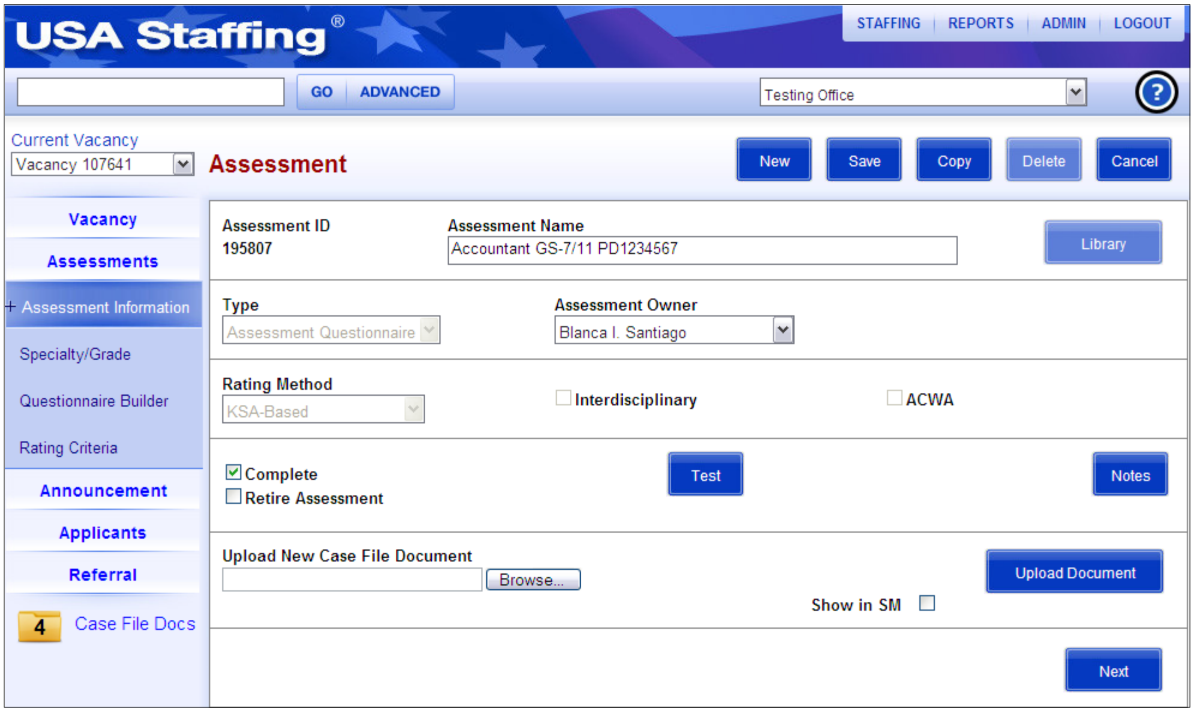
OK   Cancel

- Click OK. This will mark your assessment as complete.

Assessment

Once the assessment is tested and marked complete, you are directed back to the Assessment page. There will be a checkmark in the Complete box.

Do not uncheck this box unless you plan to revise the assessment. If the checkmark in the Complete box is removed, you must re-test the assessment.



HOT TIP! The Retire Assessment checkbox on this page allows you to deactivate assessments so they are no longer used. Based on your permission profile, you may be able to search for your own or all retired assessments and activate or deactivate your own or all assessments. To deactivate an assessment, open the assessment, check the Retire Assessment box, and click Save. To reactivate an assessment and make it available for future use, uncheck the Retire Assessment box and click Save.

- Click the Next button. This will direct you to the first page of the Announcement.

Check Your Skills – Creating an Assessment from Scratch

The purpose of this 45-minute exercise is to give the participant an opportunity to practice creating a simple assessment from scratch.

1. Click Staffing on the top navigation bar.

2. In the Search box in the upper left-hand corner of the screen, enter the VIN for the vacancy you created. Refer to the previous exercise for this information as you wrote it down.

3. Click the Assessment button on the left menu bar.

4. Enter the name for the assessment followed by your initials and click the Save button. This will ensure we do not have duplicate assessments that may have to be renamed.

5. You will now see an ID number. Make a note of your Assessment ID:

   ____

Note: By default, Assessment Questionnaire is in the drop-down box under Type. By default, KSA-Based is in the drop-down box under Rating Method. Click the Next button. You will be on the Source Information page.

6. On the Source Information page, click in the box before “Classification and/or qualification standards” and select PRINCIPAL.

7. In the Remarks box enter (type):

   This is a GS-201-9/11 training assessment to be used only for training.

8. Click the Next button again. You will now be on the Specific Info page.

9. Check the box next to “A description of how the importance of this job information was determined.”

10. Click the Next button again. You will be on the Preparation page.

11. On the Preparation page, for the purpose of this exercise, select any one of the four displayed items.

12. Click the Next button. You will be on the History Information page annotating the Assessment ID, Assessment Name, Date Created, Author, and the Phone No. Pay attention to the information shown, which should include Assessment ID, Assessment Name, date and time created, your user name, and phone number.

13. Click the Next button again. You will be on the Specialty/Grade page.

14. Click the Series button. You will see “0000 – Safety, Health, and Physical and Resource Protection” in the drop-down box.

15. Click the drop-down arrow and scroll down to select 0201 – Human Resources Specialist.

16. Click the Specialty button and type in Human Resources Specialist as the Specialty Code under Specialty.

17. Click the Grade button and enter 09.

18. Click the Save button at the top of the screen.

19. Click the Next button. You will now be on the Questionnaire Builder page.

20. Click the Add Factor button on the bottom of the screen. You will now be on the Competency/Factor page, with a new empty row added to the table.

21. Click in the new row under the Competency/Factor heading and type in Minimum Qualification – GS-201-9.

22. Click the New button at the top of the page. A new empty row added to the table.

23. Click in the new empty row and type “Knowledge of Federal Laws, Regulations, etc.”, and add a second factor/competency.

24. Click the Save button.

25. Click the column to the left of the Competency/Factor named Minimum Qualifications – GS-201-9. The arrow will come on to show that you have selected that specific Competency/Factor.

26. Click the Add Item button to go to the Item Editor page.

27. On the Item Editor page, under the Description box, leave the default as Question.

28. In the text box below, enter:

    From the list below, select the response that most closely represents your training and experience for the position of GS-9 Human Resources Specialist.

29. Click the New button below the text box. You will see the letter A.

30. In the text box for response A, enter:

    I have a master’s degree or higher in Public Administration and Personnel and experience in personnel.

31. Click the OK box below the Response text box.

32. Click the New button below the text box. You will see the letter B.

33. In the text box for response B, enter:

    I have a BA in Public Administration and Personnel and less than one year of experience in the field.

34. Click the OK box below the Response text box.

35. Click the New button below the text box. You will see the letter C.

36. In the text box for response C, enter:

    I have at least one full year of experience in personnel management equivalent to the GS-7 level described in the vacancy announcement.

37. Click the OK box below the Response text box.

38. Click the New button below the Text box. You will see the letter D.

39. In the text box for response D, enter:

    My experience is not reflected in any of the above examples.

40. Click the OK box below the Response text box.

41. Click the Save button at the top of the page.

42. On the Questionnaire Builder page, notice there is a plus sign before the Minimum Qualification Factor. Click the plus sign. You should see Question 1, which should also have a plus sign before it. Click the plus sign before Question 1. You will see the responses you entered.

43. Click the box left of the Competency/Factor named Knowledge of Federal Laws, Regulations, etc.

44. Click the Add Item button to go to the Item Editor page.

45. On the Item Editor page, under the Description box, use the drop-down arrow and select Instructions. By default, Question should already be shown.

46. In the text box, enter:

    For each task in the following group, choose the statement from the list below that best describes your experience and/or training. Darken the oval corresponding to that statement in Section 25 of the Qualifications and Availability Form C. Please select only one letter for each item.

47. Click the Save button.

48. Click the column to the left of Instruction.

49. Click the Add Item button to go to the Item Editor page.

50. On the Item Editor page, under the Description box, use the drop-down arrow and select Default Scale When you do this, you will see below the text box a Default Scale Template drop-down box. Click the drop-down arrow and select General Schedule.

51. Click the Save button at the top of the page.

52. Click the column to the left of Default Scale.

53. Click the Add Item button to go to the Item Editor page.

54. On the Item Editor page, under the Description box, use the drop-down arrow and select Question. By default, Question should already be shown.

55. In the text box, enter:

    Use and interpret the Code of Federal Regulations.

56. Click the box to the left of Use Scale to place a checkmark.

57. Click the Save button.

58. Click the plus sign to the left of Question 2. You will be able to see the text and the response, which should be the General Schedule Default responses.

59. Click the Next button at the bottom of the screen. You will now be on the Rating Criteria page. Also you will see a plus sign next to Specialty: 001 Human Resources Specialist.

60. Click the plus sign. You will see two factors.

61. For the Minimum Qualification, GS-201-9 Factor, click the Rating box to uncheck it, and then click the Screen-Out box to check it.

62. Enter the number 2 in the Min. Qual. Value box.

63. Click the box for Inelig. Code and use the drop-down to select the ineligible code ID.

64. Click the Minimum Qualification, GS-201-9 Factor. At the bottom of the screen you should see question 1.

65. Click the plus sign to view the responses. Enter a response value of 2 for responses A, B, and C. Enter a response value of 0 for response D.

66. Click the Knowledge of Federal Laws, Regulations, etc. factor. At the bottom of the screen you should see question 2.

67. Click the plus sign to view the responses. Enter the following values for each response: 0 for A, 1 for B, 2 for C, 3 for D, and 4 for E.

68. Use the drop-down list for Assign Value To: to select Scale Grade. Then click the Apply button.

69. Click the Test button at the top of the page.

70. For Test Applicant 01, enter the responses manually.

71. Click the Save button.

72. Click the New button to create an additional test applicant.

73. Click the Randomize button.

74. Ensure the screen-out questions have the correct response to rate the test applicant either eligible or ineligible.

75. Click the Save button.

76. Repeat steps 72–75 until you have four Test Applicants.

77. Click the Rate All button. A Test Rating Summary Report should appear.

78. If the Final Ratings appear to be correct, close the Report and then click the Next button at the bottom of the page.

79. Click OK on the "Mark This Assessment Complete?" popup screen. This will bring you back to the Assessment page, where the Complete box should be checked.

Check Your Skills – Attaching an Assessment from the Library

This 15-minute exercise gives the participant the opportunity to practice attaching and modifying an existing assessment from the library.

Search for an existing assessment by doing the following:

1. Click Staffing on the top navigation bar.
2. Click the Vacancy button on the left menu bar. You will now be on the Search screen for Vacancy.
3. Enter the VIN for the first vacancy you created in a previous exercise.
4. Click the Go button.
5. Click the Assessment button on the left menu bar. You will be on the Assessment page.
6. Click the Library button. You will be on an Advanced Search page for Assessments.
7. In the box under Series, enter 0201.
8. Your instructor will provide you with additional search criteria.

    Grade ______________________

    Author______________________

    Title ________________________

9. Click Partial Search.
10. Click the Go button.
11. Click the Open link to the left of the assessment you want to open. You will now be on the Assessment Information page.
12. If the assessment is marked Complete, uncheck the box and rename the assessment (include your initials) to make it unique to your vacancy.
13. Click the Save button
14. Select the Questionnaire Builder item on the left menu bar.

15. Click the plus sign to the left of each factor. You should be able to see the factors and the questions for each factor.

16. Click any of the questions to go to the Item Editor page.

17. Modify the question you selected in the Text Editor screen.

18. Click the Save button.

19. Click the Rating Criteria button on the left menu bar.

20. Click the plus sign next to the specialty.

21. Make sure all checkmarks are in the appropriate column(s) to the right of each factor that you are using to indicate if the factor is a Rating Factor or a Screen-Out Factor.

22. Click the Save button.

Check Your Skills – Retrieve and Import an Assessment Tool

This 15-minute exercise gives the participant the opportunity to practice importing an assessment tool.

To retrieve an assessment import file, take the following actions:

1. Open the Assessment tool you modified in the previous exercise.
2. Click the Questionnaire Builder button on the left menu bar.
3. Click the Preview button on the bottom of the page.
4. Choose “File Save as” on the main menu.
5. Save the file as a plain text document on your desktop.

You now have an Assessment Import file. Before you import the assessment text file, create another vacancy, following the steps you went through in an earlier exercise. Continue through to the Assessment Questionnaire page.

6. Click the Import Document button to display the Process Document page.
7. In the text entry box under Select the File to Process, either type the full path and filename of the file or navigate to it using the Browse button.
8. Click the Process button. The document file will be read into USA Staffing and loaded into the Questionnaire Builder. The Questionnaire Builder page will be presented to you for your review.
9. Click the Save button.

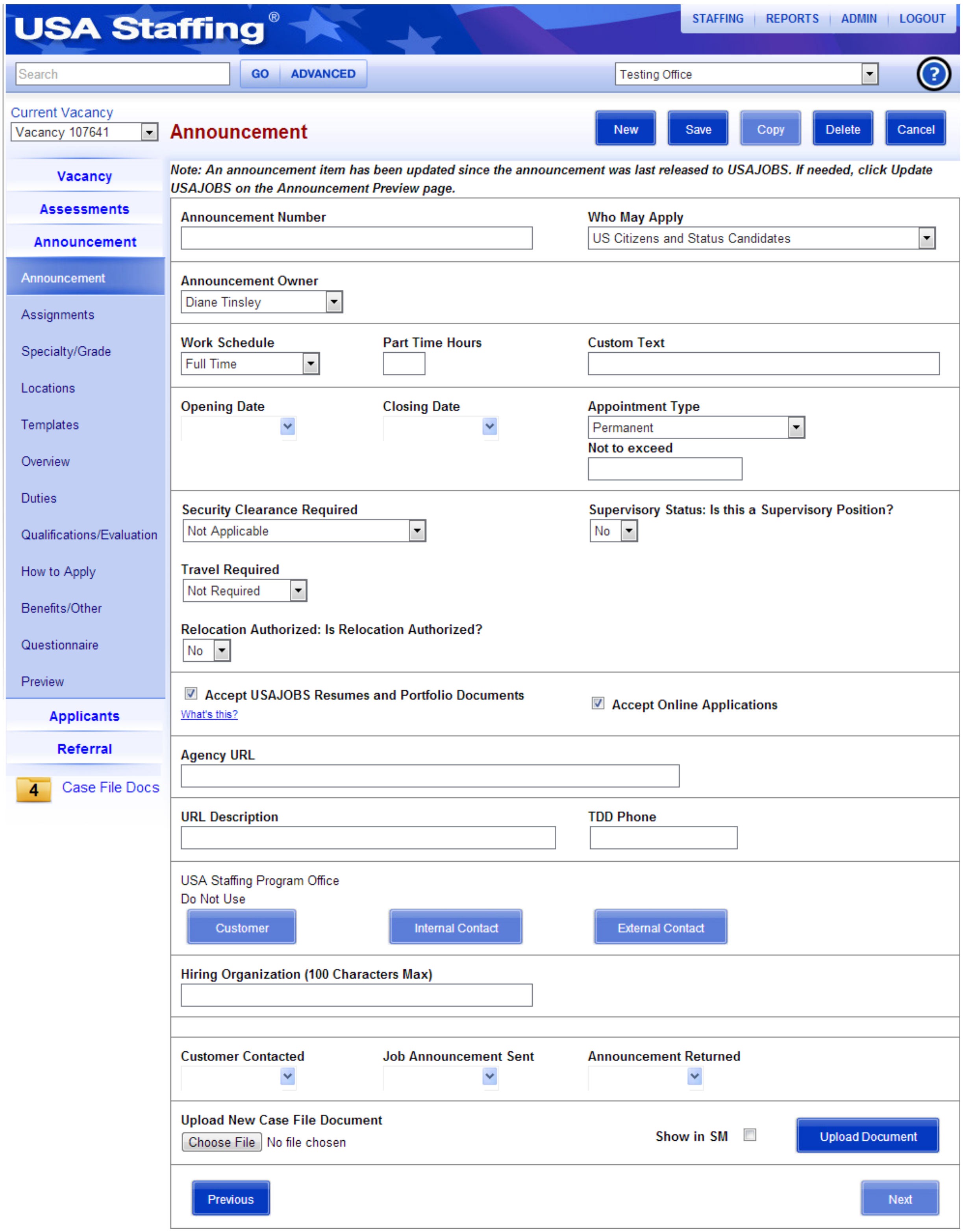
Announcement

- Announcement
- Assignments
- Specialty/Grade
- Locations
- Templates
- Navigating Through the Announcement
- Formatting Features
- HTML and Formatting
- TAGs
- Overview
- Duties
- Qualifications/Evaluation
- How to Apply
- Benefits/Other Information
- Questionnaire
- Preview
- Checking the Complete Box
- Release to USAJOBS

The USA Staffing Announcement area allows you to manage the content and appearance of job announcements. The information and formatting you provide will determine how your job announcement displays on USAJOBS. You may use Announcement templates, links, and TAGs to save time, provide consistency, and reduce the size of the announcement.

Announcement

Below is the Announcement information page, where you start your job announcement.



The following fields are displayed on the Announcement page:

- **Announcement No.** Type in your announcement number. This number will appear on USAJOBS and will be used by applicants and USA Staffing users to locate this job announcement. You may use any set of numbers or letters for the announcement number. However, the USA Staffing Program Office suggests that you use the following combination:
  - Office Code + VIN (Vacancy ID Number) + Your Initials
  - Using this combination consistently will make it easier for you to remember the announcement number. It will also make it easier for Help Desk staff to locate your announcement when you have questions.
- **Work Schedule.** Select the proper work schedule for the job announcement.
- **Part Time Hours.** If you select Part Time as the Work Schedule, enter the number of hours in the text entry box next to Part Time Hours.
- **Who May Apply.** This area corresponds to the Area of Consideration choice made on the Position Information page in the Vacancy area. Use the drop-down list to select the appropriate applicant pool based on that choice.
  - Competitive and Merit Promotion options:
    - United States Citizens

    Note: The default text under "Who May Be Considered" is: Applications will be accepted from United States citizens and nationals.

    - US Citizens and Non-Citizens
    - US Citizens and Status Candidates
    - Status Candidates (Merit Promotion and VEOA Eligibles)
    - Qualified Civil Service Employees
    - Outstanding Scholarship Eligibles
    - Student Program Eligibles

    Note: The default text under "Who May Be Considered" is: Applications will be accepted from degree seeking students enrolled at least half-time in accredited institutions.

    - CTAP
    - ICTAP and VEOA

  - All groups of qualified individuals
  - All groups of qualified individuals within the civil service
  - Public

  Note: This is the same as U.S. Citizens.

  - Current members of the Senior Executive Service
  - Veterans/Family members with qualifying military service only

- Internal Merit Promotion options:

  - Agency Employees Only - Intranet Posting Only—announcements with this option selected, are posted to the agency's exclusive web site. Applicants will only see these jobs if they can access the internal jobs posting Web page within their agency's Intranet. These announcements will not appear on USAJOBS to the public.

  Note: The default text under "Who May Be Considered" is: Applications will be accepted from current agency employees only.

  - Exclusive Posting - Will Not Appear on USAJOBS or Intranet—announcements with this option selected, do not appear on USAJOBS or Intranet Web sites. You must replace the Xs in the following URL with the USAJOBS control number assigned when the announcement is released to USAJOBS and provide the complete URL (http://www.usajobs.gov/GetJob/ViewDetails/XXXXXXXXX) to eligible applicants so they can access the announcement and apply.
  - Agency Employees Only - Appearing on USAJOBS—announcements with this option selected, are posted to the agency's exclusive Web site and USAJOBS. Note: The default text under Who May Be Considered on the USAJOBS announcement is: Applications will be accepted from current agency employees only.

- **Custom Text.** The Custom Text field is limited to 500 characters (including punctuation and spaces). The text entered in the Custom Text field will override any information contained in the "Who May Apply" menu.
- **Announcement Owner.** This drop-down list initially shows the user specified as the vacancy owner. If appropriate, another user can be designated as the announcement owner by selecting his or her name from the list. This is used for work ownership tracking and reporting purposes.
- **Opening Date/Closing Date.** Enter the opening and closing dates for the announcement.
- **Appointment Type.** Select the appropriate appointment type for your vacancy.

- **Not to exceed.** If Temporary or Term is selected as appointment type, enter the "not to exceed" text; for example, NTE 1 year or NTE 2 years.

- **Security Clearance Required**. Select the appropriate type of security clearance required for the position.

- **Supervisory Status: Is this a Supervisory Position?** Select yes or no to indicate if the position is supervisory or not.

- **Travel Required.** Select the appropriate amount of travel required for the position.

- **Travel Description**. Enter a description if travel is required for the position.

- **Relocation Authorized: Is Relocation Authorized?** Select yes or no to indicate whether there is relocation expenses authorized for the position.

- **Relocation Description**. Enter a description if relocation is authorized for the position.

- **Accept USAJOBS Resumes and Portfolio Documents.** Leave the checkmark in this box to route applicants through their USAJOBS account when applying online. This is the preferred method for submitting resumes. Here are the options:

  - Checked. As a default, this box will be checked. Applicants who click the Apply Online button will be directed to the USAJOBS Login page. Once logged in, they can upload a resume of their choice, select an existing resume from their account, or create a new one using the resume builder feature. Once a resume and portfolio documents are selected, the applicant is directed to Application Manager to complete the online questionnaire for that VIN. Once the applicant submits the questionnaire, the applicant's responses and documents are uploaded to USA Staffing creating an applicant record for this VIN.

  - Unchecked. If this box is unchecked, applicants who click the Apply Online button will be routed to their USAJOBS account, but they will be unable to upload documents from that account. Applicants will be directed to Application Manager to complete the online questionnaire for that VIN and will have the option to submit a resume and other supporting documents through Application Manager.

- **Accept Online Applications.** A check in this box will determine whether the system will accept online applications.

  - Checked. As a default, this box will be checked. Applicants will be able to access and respond to the online questionnaire. When this box is checked, the Apply Online button will appear in USAJOBS, and applicants can click it to begin the online application process.

  - Unchecked. Use caution. If you remove this checkmark, the Apply Online button will not appear in USAJOBS. Applicants using the online questionnaire URL will not be allowed to apply, and they will see the following message: “This announcement does not accept online applications.”

- **Agency URL.** Enter the agency’s Web site URL. To publish the URL in the announcement, insert the Agency URL TAG where you want the URL to appear. This is not a required field.
- **URL Description.** Enter the description of the Agency URL. This will appear next to the URL link in your announcement.
- **TDD Phone.** If applicable, enter the phone number provided to hearing impaired applicants using a Telecommunications Device for the Deaf (TDD).
- **Customer.** This will pre-populate from the Customer assigned on the Position Information page in the Vacancy area; no action is required.
- **Internal Contact.** Click this button to select the person who may be contacted by USA Staffing or USAJOBS support personnel for more information about this job announcement. This internal contact information is not published to the public.
- **External Contact.** Click this button to select the name of the person who may be contacted for more information about the job announcement. This contact information is published in the right-hand column of the job announcement on USAJOBS.
    - When users assign the External Contact, the address, phone, and fax information can be obtained from two sources, Office or Customer. If the user selects OK, the system will use the information in the Office profile. If the user selects Cancel, the system will use the information in the Customer profile.
- **Hiring Organization.** If applicable, this field may be used to designate the Hiring Organization within the agency.
- **Customer Contacted/Job Announcement Sent/Announcement Returned.** These date fields are used for tracking and documentation purposes. These are not required fields. These dates will not show up on the announcement.

HOT TIP! The Upload New Case File Document section allows you to upload case file documents for an announcement. Documents uploaded here are listed in the Vacancy > Case File Documents page and will undergo a virus scan.

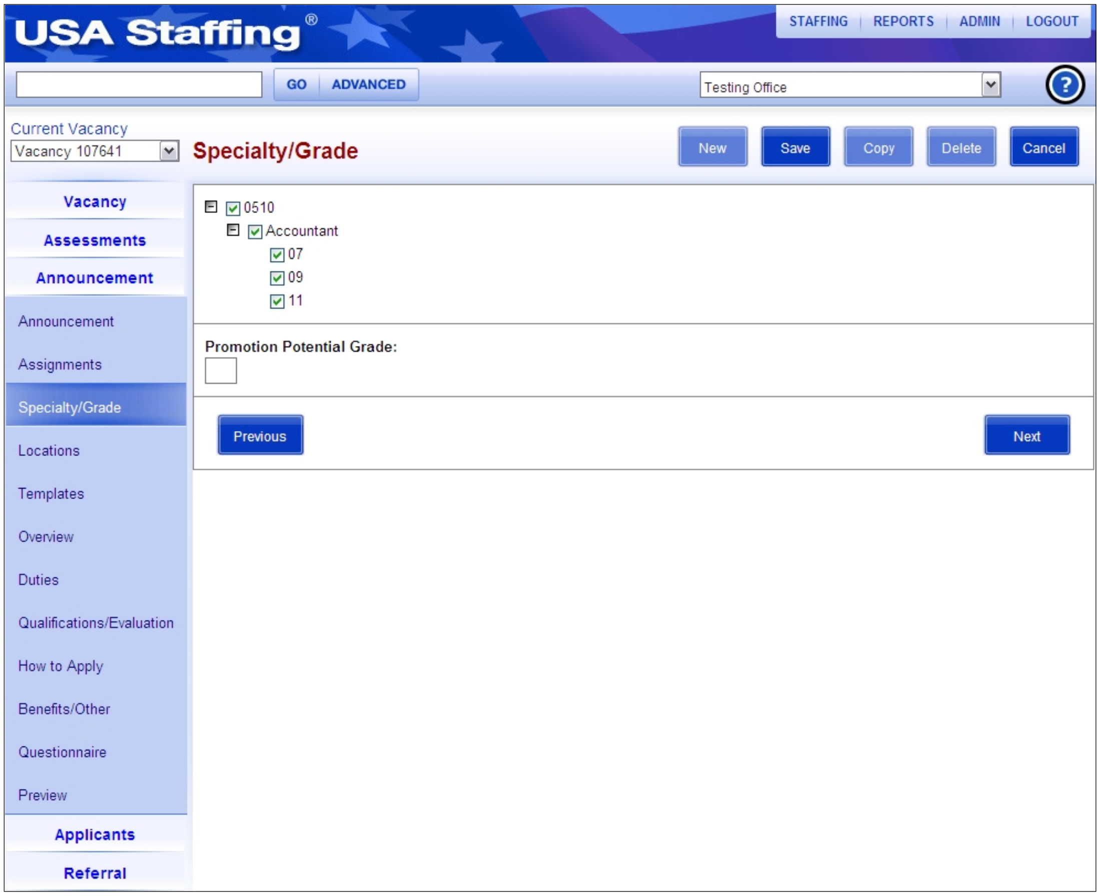
Assignments

On the Assignments page you can document work assignments for staff members or workgroups. To do this, follow these steps:

- Click a radio button to indicate whether you will assign an individual or workgroup.
- Click the New button to create an Assignment record. A new row will appear in the table.
- Click the staff member column to assign names.
- Click the task column adjacent to the name to type in the task.
- Click the Next button to go to the Specialty/Grade page.

Specialty/Grade

The Specialty/Grade page specifies the specialties and grades covered in the job announcement.



Once an assessment is added to the vacancy, the system will automatically check all series, specialties, and grades unless the vacancy is copied and the assessment is modified to add grades. In this case, the added grades have to be manually checked on this page.

These are the actions to take on this page:

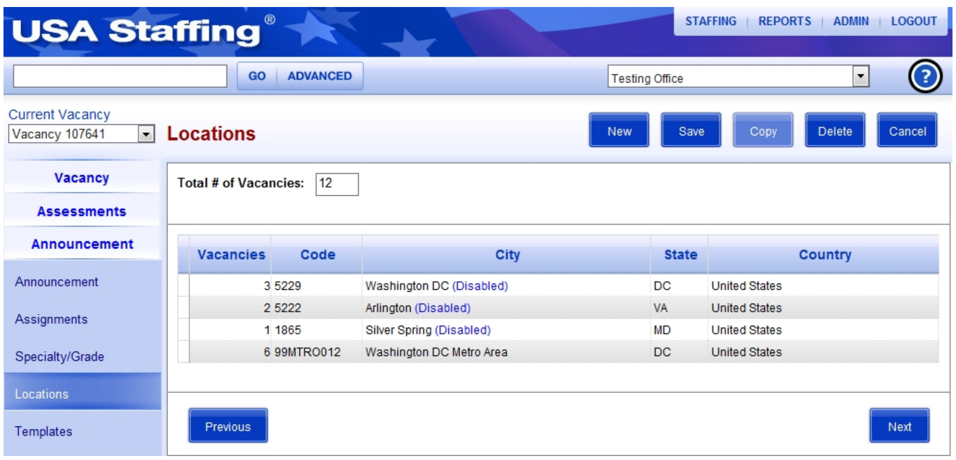
- Click the plus sign to the left of the series checkbox to expand the list and show all specialties and grades. Verify that the appropriate series, specialties, and grade(s) are checked.

  Note: The system will not rate applicants for any unchecked series, specialty, and/or grade. The applicant record will show the IZ code (i.e., closed to receipt of new applications at this time) for all unchecked series, specialties, and/or grades. If you omit a grade from the job announcement, you cannot rate, evaluate, or refer applicants for that grade level after the announcement closes.

- In the Promotion Potential Grade box, enter the full performance level for the position being advertised.

Locations

The Locations page allows you to add and view the geographic location(s) that will appear on the job announcement. Geographic locations are used for multiple purposes. USAJOBS uses geographic locations to select the job announcements that match job seekers' search criteria. USA Staffing uses geographic locations to show on the job announcement where the positions are located. Finally, applicants use geographic locations during the application process to indicate the location(s) for which they would like to be considered for employment. To access this page, open an existing vacancy, click Announcement on the left menu bar, and click Locations.



Once you add a location, the table on this page will display the following information:

Total # of Vacancies. This field displays the total number of vacancies for the job announcement and the number of possible vacancies in each location listed. To change the total number of vacancies, click this field, change the value, and click Save. This field does not necessarily need to equal the sum of the number of vacancies indicated for each selected location.

Vacancies. This field displays the number of vacancies in the selected location. To change the number of vacancies, click this field, change the value, and click Save.

Code. This is the 9-digit GSA Geo Location Code (GLC).

City. This field displays the city name. Cities associated with the superseded 4-digit location codes will display as "Disabled".

State. This field displays the State for U.S. locations.

Country. This field displays the Country.

To add a GSA Geographic Location to the announcement:

- Enter the number of vacancies and click the Save button.
- Click the New button. The Select Announcement Location page displays.

If adding a U.S. location:

- The Country field defaults to United States.
- Select the State from the drop-down list. The page will refresh to include the cities and counties available for the selected state.
- Select the City OR County from the drop-down lists. The system will populate available GSA Geo Locations found based on the criteria selected.

Note: Locations Negotiable After Selection (990000000). This option displays for most U.S. cities. This code should be used for large nationwide recruitments and should not be used for telework positions, which is a condition of employment. For USAJOBS search purposes, announcements with this location code will be displayed when searching for jobs in the following cities, Seattle, WA, San Francisco, CA, Los Angeles, CA, Dallas, TX, Denver, CO, Chicago, IL, Atlanta, GA, Washington, DC, New York City, NY, and Boston, MA.

If adding an international location:

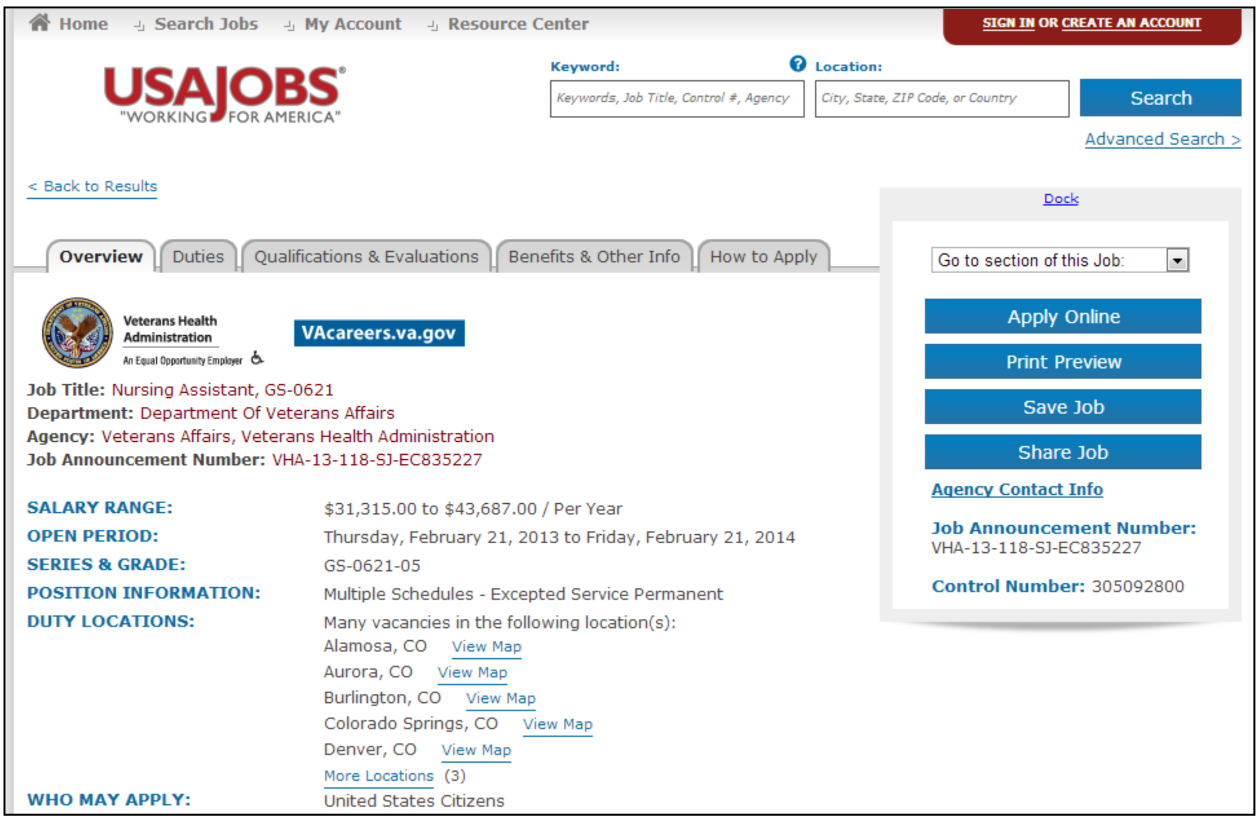
- The Country field defaults to United States. Select a different country from the drop-down list. The page will refresh to include the cities available for the selected country.
- Select the City from the drop-down list. The system will populate available GSA Geo Locations found based on the criteria selected.

Once you locate the U.S. or international location:

- Select the location to be included in the announcement by checking the box to the left of the Vacancies column.
- On the Vacancies field, enter the number of vacancies for each location, using digits such as 1, 2, 3, or the words Few or Many.
- Click the Save button. Save before selecting another country, state, or city if selecting additional locations. The selected location(s) and number of vacancies will be added to the Locations page.

Repeat these steps to select additional location(s) and enter the number of vacancies.

When an announcement includes multiple locations, USAJOBS displays a "Multiple Locations" link in the Locations field of the search results. If the number of locations exceeds five locations, a "More Locations" link appears in the Duty Locations field of the announcement.



Clicking the "More Locations" link displays additional duty location information at the bottom of the announcement.

Templates

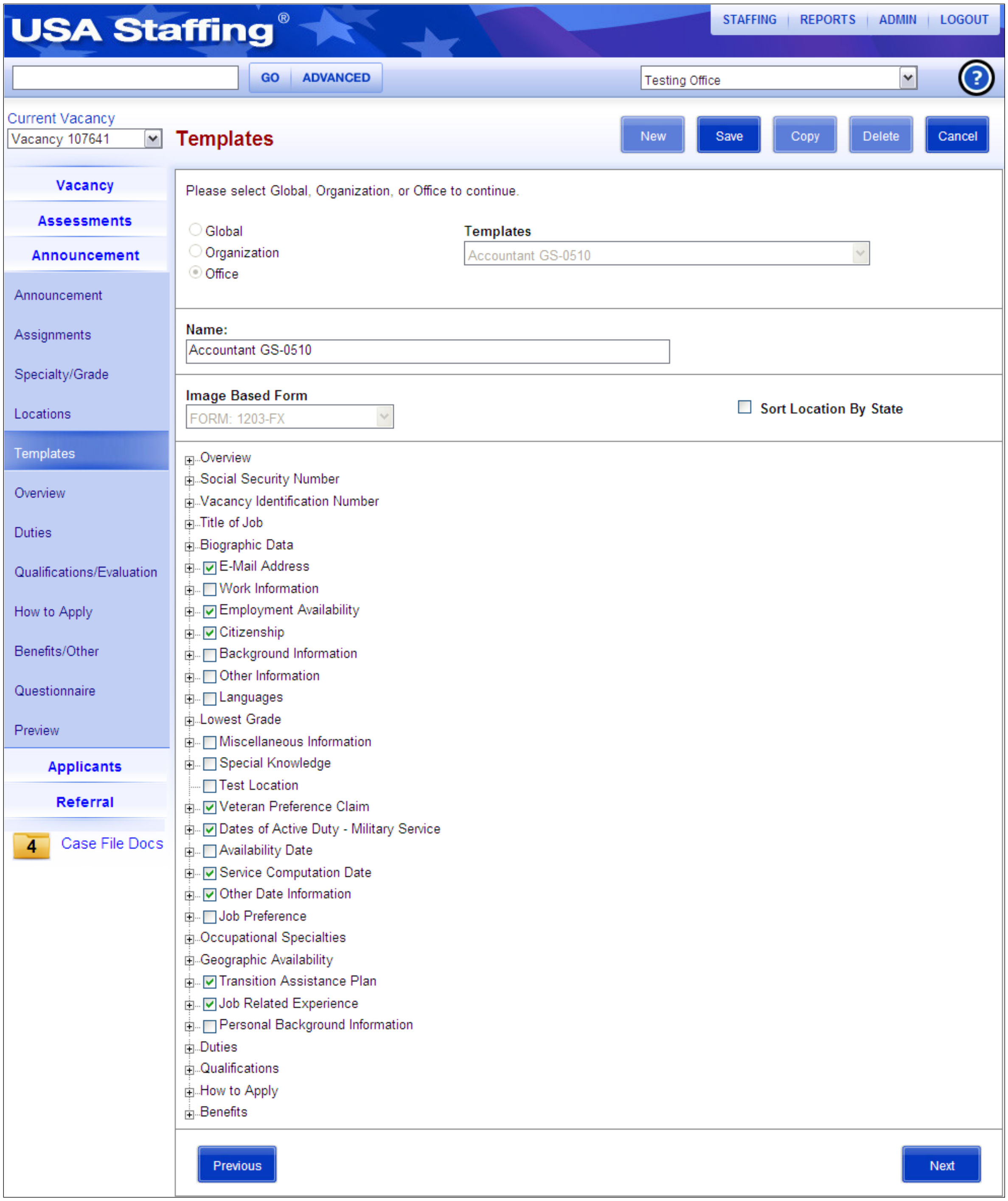
The Templates page provides a means to select the announcement template to be used for the announcement. Templates may be selected from the Global, Organization, and Office levels. They provide consistency and efficiency when developing new job announcements.

Templates are pulled from Administration/Template Libraries. When the template is selected and applied to your vacancy, you are able to modify it to suit that specific announcement. The original template remains in the Administration area and is not affected by any modifications you may make in the Staffing area. Templates in the Administration area are available to everyone in your office.

To access and modify an existing template, take these steps on the Templates page:

- Click the appropriate radio button to select a template from the Global, Organization, or Office level library. The page will refresh to populate the Templates drop-down selection box with the templates available.
- Select the appropriate template from the Templates drop-down list. (See next page.)

USA Staffing will automatically copy the contents of the selected template into the vacancy.



The Image Based Form selection box is set to FORM: 1203-FX by default. This means that USA Staffing will format your online questionnaire to correspond with the data fields used on the OPM Form 1203-FX. (See Appendix D for a printed copy of this form.)

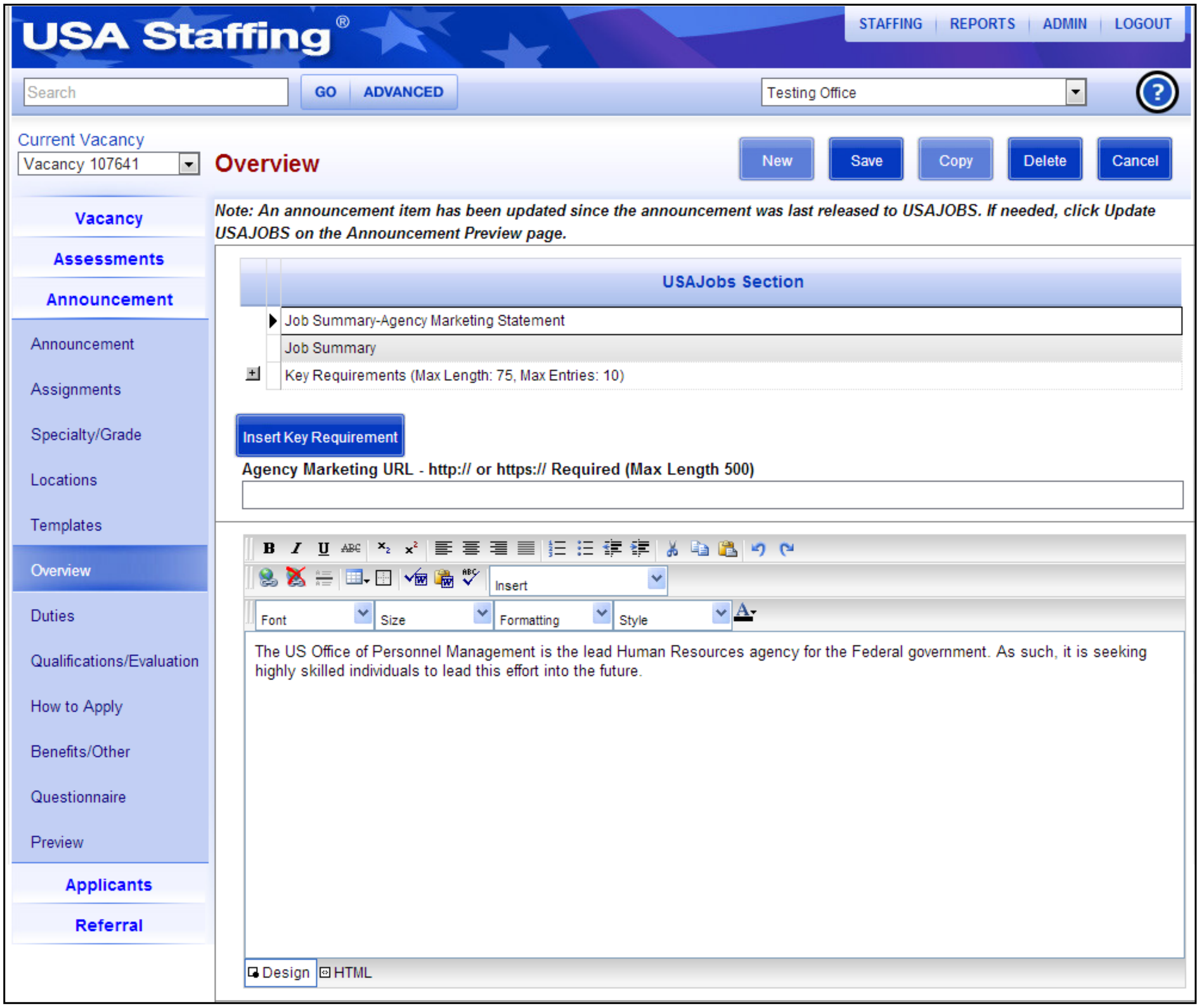
Sort Location By State. Check this box if you have locations in multiple states and want those locations sorted by state on the announcement and online questionnaire. Otherwise, locations will appear in location code order.

Once a template is selected, the bottom half of the Templates page will list the headings of all main sections and subsections that could appear in your job announcement and/or online questionnaire. The items checked on the Templates page are data fields that will appear on the online questionnaire and are used to collect data from applicants when they apply to this announcement.

You can indicate which data fields will be used in your announcement by checking the boxes next to the items or remove data fields from your online questionnaire by removing the checkmark. Any data field selected will need instructional text, questions, and/or responses. Some of these data fields have the check box grayed out so they cannot be removed. These items, such as Lowest Grade, Occupational Specialties, and Geographic Availability, are mandatory.

Often, templates have these data fields predefined and no action is required on your part. However, if you must add one of these items or modify an existing one, this is done on the Questionnaire page of the Announcement section.

Navigating Through the Announcement



Use the left menu bar to navigate among the Announcement pages. You must save prior to moving from one page to the next. Failure to save before navigating to another page will result in your text changes being lost. You may also want to save periodically to avoid being timed-out of the system.

Each of the Announcement pages contains in the upper portion of the page a table with various sections for that page and a corresponding text box on the lower portion of the page. You must select the section you want to view or modify from the upper table to display the associated text in the lower box.

To add or modify content for the announcement sections, follow these steps:

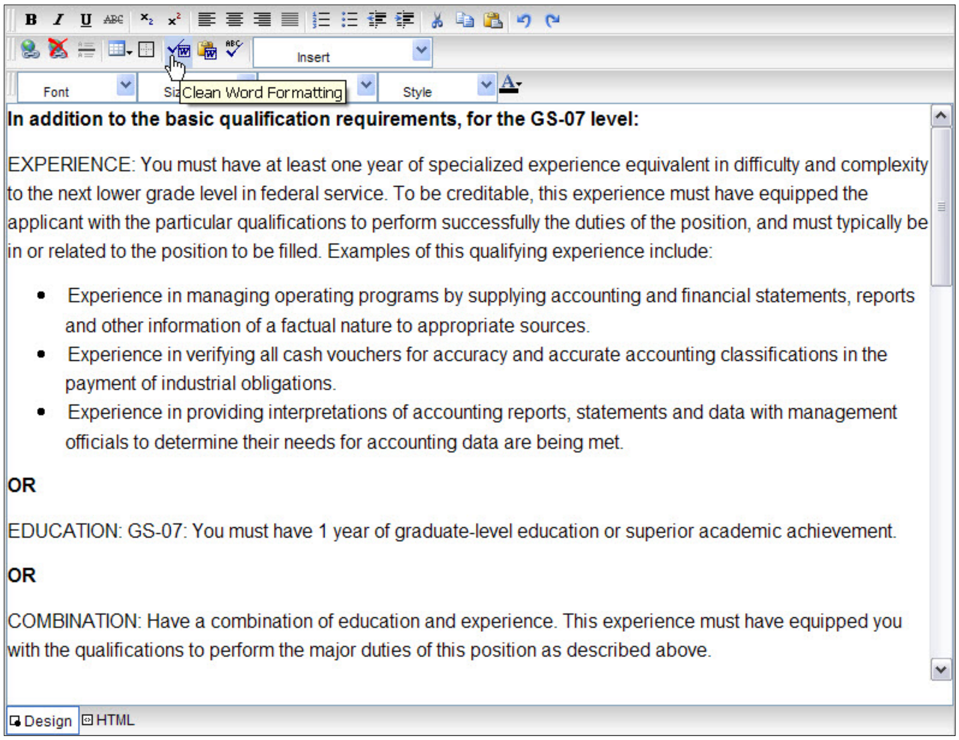
- Click the section at the top of the page. The selected section will have an arrow in the left column.

- Enter your text in the box located on the bottom half of the page.
- Repeat these steps for all remaining sections on the table.

Formatting Features

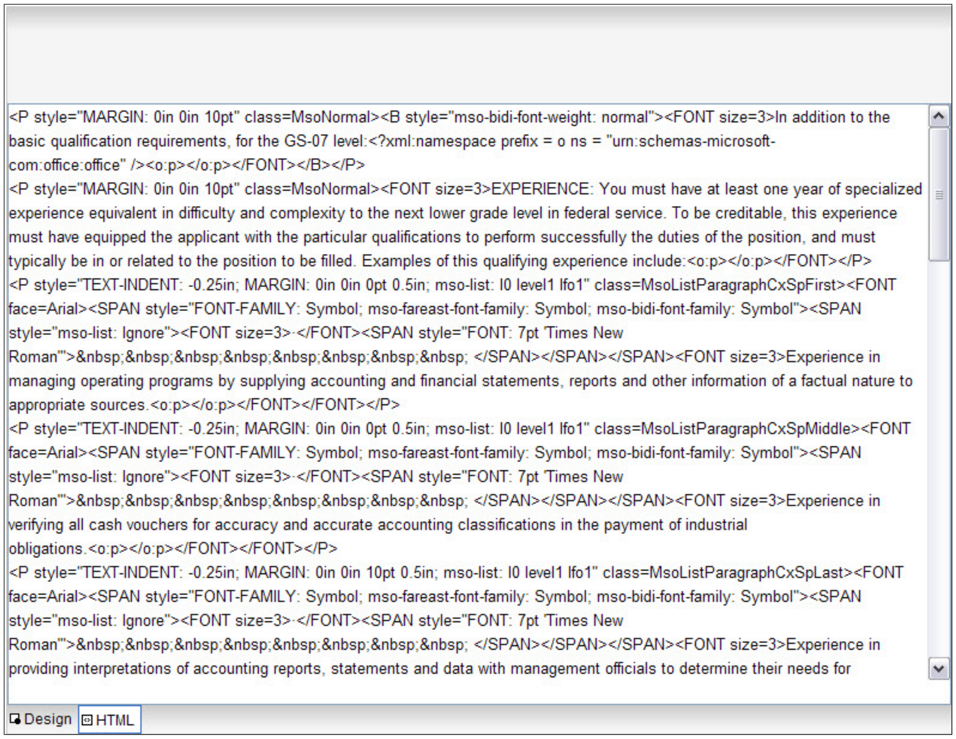
Each text box provides multiple formatting features similar to those found in a word processing software.

Clean Word Formatting. If you have copied and pasted text into a field from a Word document or some other source, you can use the Clean Word Formatting button to remove any excess HTML code that may affect formatting. See picture below.



HOT TIP! You can change the view from Design to HTML display before you paste the copied text. Pasting text into the HTML textbox eliminates any excess HTML code brought over from the original source from which you copied the text.

HTML Display Feature. The HTML display feature will show the text in HTML format. Often, text copied and pasted from other Web-based sources contains excess code.



HTML and Formatting

HTML is the format used by USAJOBS to present the announcement information to the applicants in the online environment. The transfer of incorrect HTML coding stored in USA Staffing may adversely affect the announcement presentation.

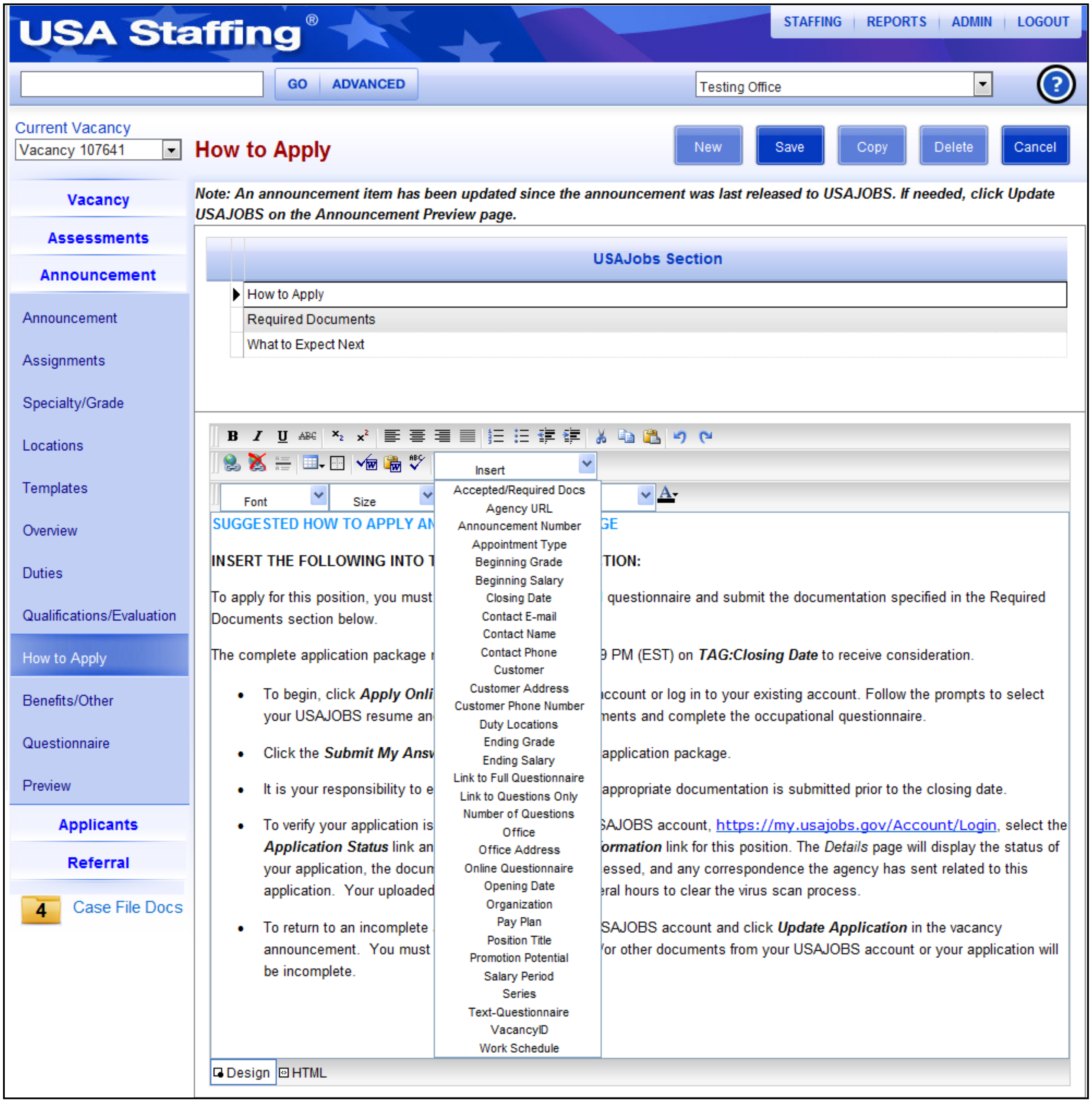
In addition, when you include HTML coding from text that was cut and pasted from a Web-based source, you may exceed the number of characters permitted in that part of the announcement. Character limits are based on the total number of characters contained in the USA Staffing field and not on the actual word count. To view all characters in a given text box; select the HTML button below the text entry box. (See previous example.) Delete any incorrect or extraneous HTML code.

To minimize formatting problems in your announcements, take the following precautions:

- Avoid copying and pasting text from an existing online announcement or other online source directly into your announcement. This will almost always result in problems. The Clean Word Formatting button may not remove all excess code in these cases.
- If you must copy text from an online source, paste it into the HTML view of the item editor. Pasting the copied text into the HTML textbox eliminates any excess code brought over from the original source from which you copied the text.
- If working with large amounts of text, you could also paste it into Notepad or Word and save it as a plain text file; saving it as a plain text document will strip most of the excess code. Then copy and paste the plain text version into the text box in USA Staffing.
- You can use the Font and Size drop-down lists to adjust the text. Typically, size 2 is the correct size for your announcement text.
- The USAJOBS Web site's default font is Verdana. Please ensure that you are as consistent as possible with your font choices. Remember when you cut and paste, the font style of the original document will come over into the announcement text. If your template format is Verdana or Arial and you cut and paste text in New Times Roman, the announcement will reflect the two different fonts when published to USAJOBS. Highlight the section of text and change the font as appropriate using the font drop-down list to select the appropriate font. Announcements with various fonts and/or excess HTML code will not look professional and/or will require each user who pulls the template into their vacancy to modify the content. If the template is not correct, then the same formatting problem will repeat with each subsequent announcement released using that template. Please ensure any templates developed are free of excess HTML code and have good consistency of formatting, font styles, and sizes.

HOT TIP! Plain text documents bring over little or no HTML code.

TAGs



TAG is a programming code that directs the system "To Automatically Get" the specified data.

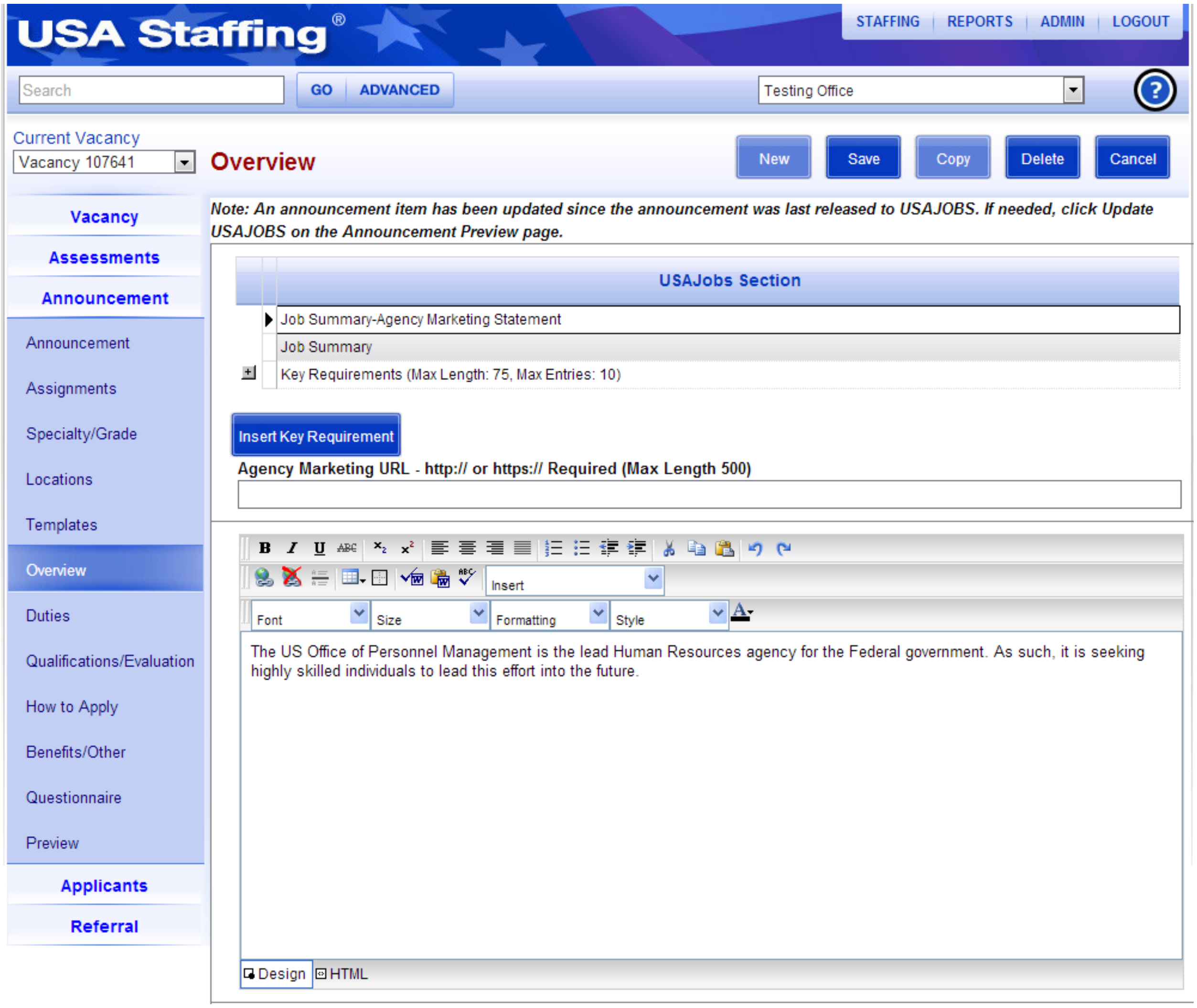
The bottom half of the Announcement Overview page is a text editing area. In the illustration above, the TAG items represent USA Staffing data elements that can automatically populate the announcement text with the appropriate information. For example, where TAG: Announcement Number appears, the system is going to show the announcement number you entered on the Announcement Information page; where TAG: Vacancy ID appears, the system will show the VIN. See Appendix G for TAG descriptions.

Inserting a TAG. Place the cursor where you want the TAG to appear in your text. Then select the TAG from the Insert drop-down list.

Deleting a TAG. Select the TAG in the text box and press Delete on your keyboard.

Overview

The Overview page is where you manage the text that will appear in this area of the job announcement when it is released to USAJOBS.



The Overview page contains the following three sections:

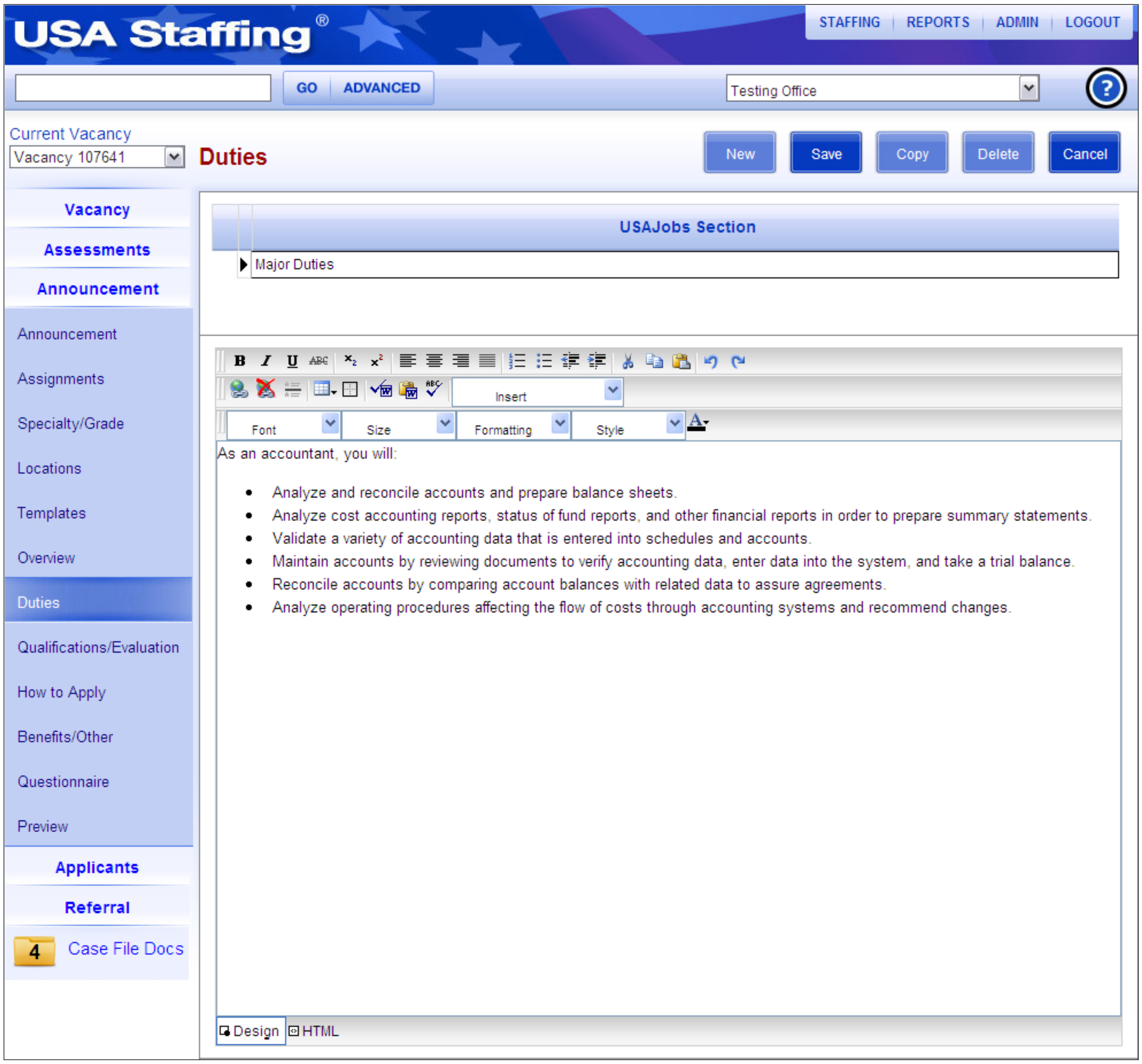
- **Job Summary–Agency Marketing Statement.** This section allows for 1,500 characters and is used to briefly describe the agency's marketing statement or any points of special interest to job seekers. (Required)
- **Job Summary.** This section permits up to 2,500 characters to provide a job summary to the job seeker. This may include a quick overview of the agency's mission and how the position relates to it. (Required)
- **Key Requirements.** This section permits up to ten key requirements. Each requirement is limited to 75 characters. You can modify, add, or delete key requirements as appropriate.

- **Agency Marketing URL - http:// or https:// Required (Max Length 500).** The Agency Marketing Statement will display either the URL or the text, not both.

They appear in bullet form below the Overview section of the job announcement on USAJOBS. If any key requirements already exist, a plus sign appears to the left of the Key Requirements row.

Duties

The Duties page is where you manage the text that will appear in this area of the job announcement when it is released to USAJOBS.



Qualifications/Evaluation

The Qualifications/Evaluation page is where you manage the text that will appear in this area of the job announcement when it is released to USAJOBS.

The Qualifications/Evaluation page contains the following four sections:

- **Qualifications.** This section allows up to 8,000 characters and is used to describe the position qualification requirements as well as any selective placement factors. (Required)
- **Education.** This section allows up to 2,000 characters and can be used for additional qualification or education information.
- **Requirements.** This section allows up to 2,500 characters and can be used to describe any requirements in addition to those already listed. (Required)
- **Evaluations.** This section allows up to 3,500 characters and is used to describe the evaluation process used for the vacancy.

How to Apply

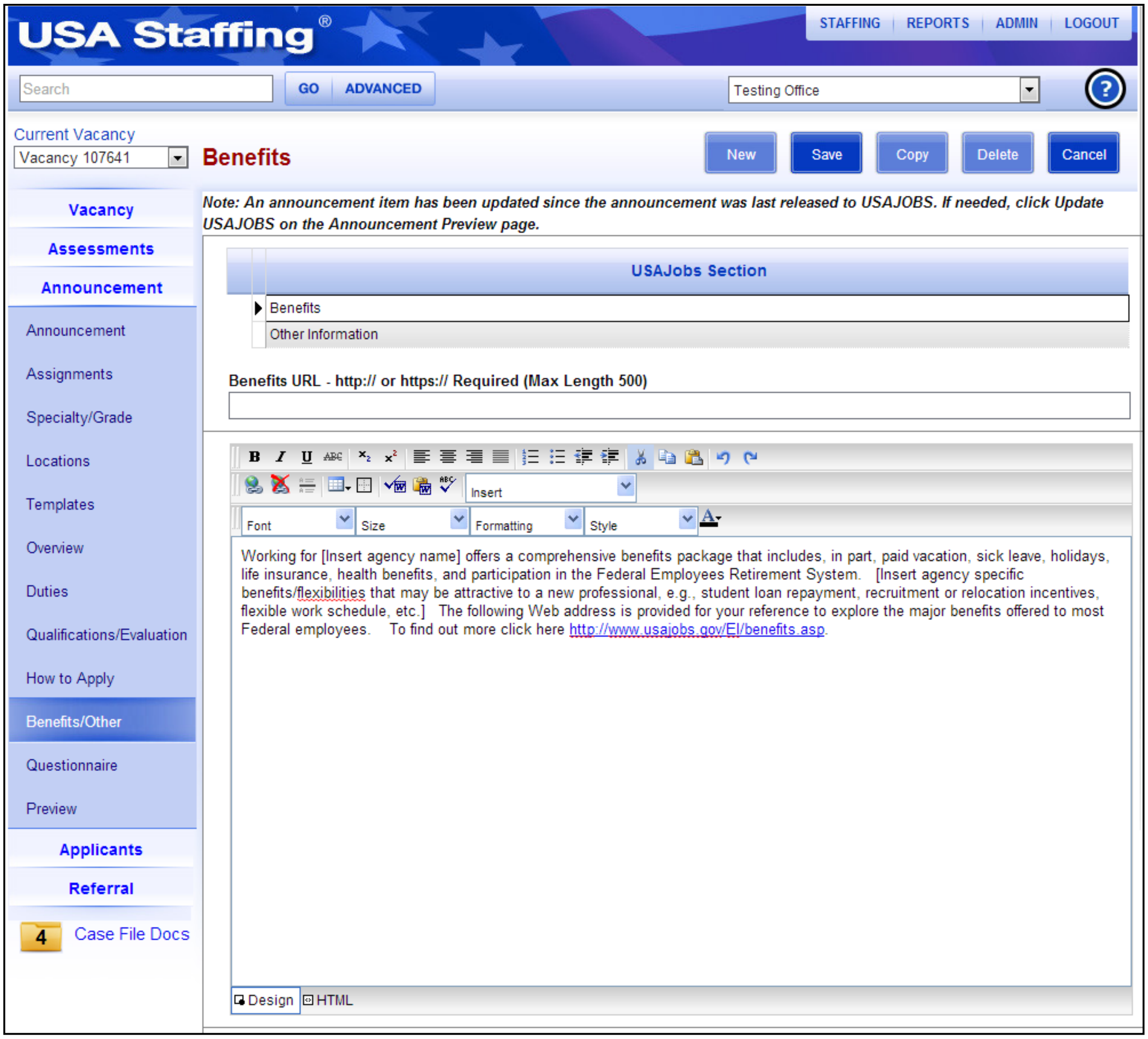
The How to Apply page is where you manage the text that will appear in this area of the job announcement when it is released to USAJOBS.

The How to Apply page contains the following three sections:

- **How to Apply.** This section allows up to 5,000 characters and is used to describe the application procedures for the vacancy. (Required)
- **Required Documents.** This section allows up to 5,000 characters and is used to list documents that are required to complete the application package. This section should explain what supporting documentation the applicant is expected to submit when applying for the position. (Required).
- **What to Expect Next.** This section allows up to 2,500 characters and is used to inform the applicant of what will occur after they submit their application and when they should expect to be notified.

Benefits/Other Information

This page is where you manage the text that will appear in this area of the job announcement when it is released to USAJOBS.



The Benefits/Other Information page contains the following two sections:

- **Benefits.** This section allows up to 1,500 characters and is used to list benefits applicants can expect from Federal employment and any agency-specific incentives. (Required)
- **Other Information.** This section allows up to 3,500 characters and may be used for any additional pertinent information that may not be appropriate in other sections of the announcement.
- **Benefits URL - http:// or https:// Required (Max Length 500).** This optional section may contain an additional URL.

Questionnaire

The Questionnaire page is where you manage the text for the non-assessment items that will appear in the online questionnaire. Examples include questionnaire items asking for applicants' contact information, citizenship, veteran preference, and geographic preference.

This page displays the items that will be used to collect information from the applicants for this job announcement. These items, along with the responses to the questionnaire and the documentation submitted by the applicant, comprise the applicant's record for this VIN. Items on this page are established by the selections made on the Templates page.

The Questionnaire page includes the items selected on the Templates page. Follow these steps to review this page:

- Verify that the sections displayed on this page are in fact required and that they contain instructions and appropriate responses. If you discover sections that are not applicable to your announcement, you must remove them (by un-checking the boxes) on the Templates page.

- Click the plus sign to the left of the Section Name to display the item names.

  Note: Certain items are always marked as Mandatory; the checkmark indicates it is read-only.

- Click the box to the left of the Item Name to add or edit instructions and/or responses.

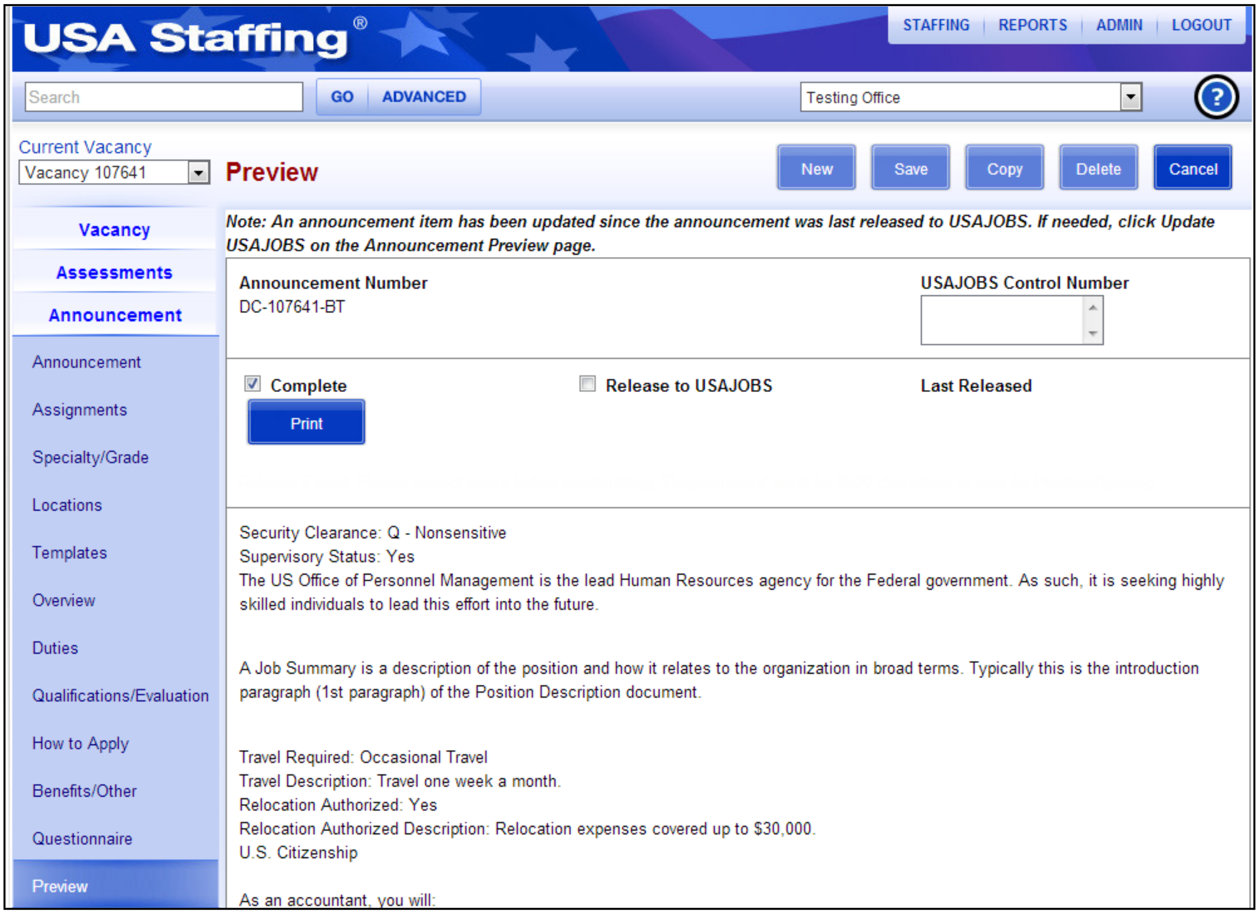
- Click the Insert Item button if you want to add an item—typically a question—to the selected section.

- Click the Edit Item button to add or modify instructions.

- Click the Insert Response button to add or modify response options in an item. Remember, these items mirror the OPM Form 1203-FX. Consult this form for the layout of your codes, questions, and responses.

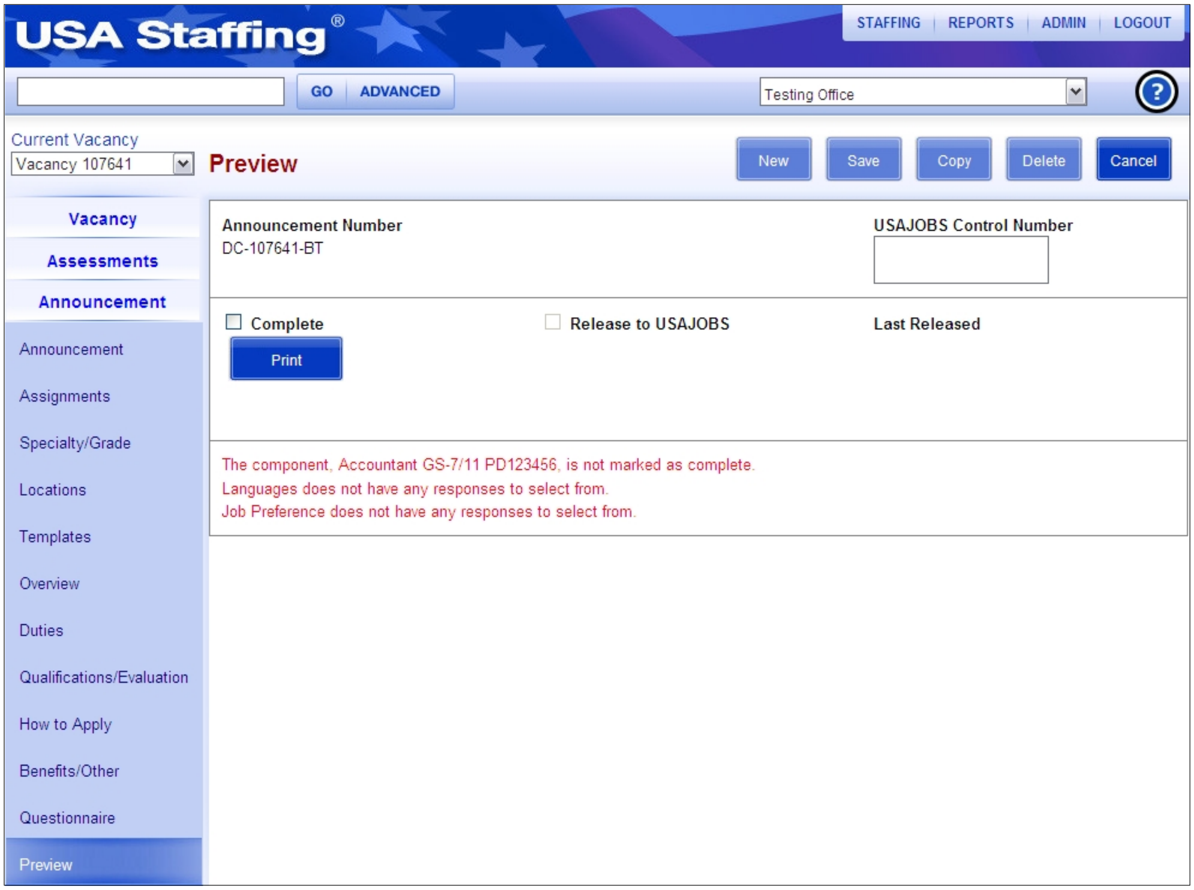
Preview

The Preview page displays the content of your job announcement. This preview gives you the opportunity to review the announcement text before you release it to be posted on USAJOBS. To make corrections, you will need to return to the appropriate section(s). You can also preview and/or print the announcement text by clicking the Print button.



Checking the Complete Box

When the Complete box is checked, USA Staffing runs an edit to ensure your announcement contains the required information. If errors are present, the system will indicate in red those sections or items that need to be corrected.



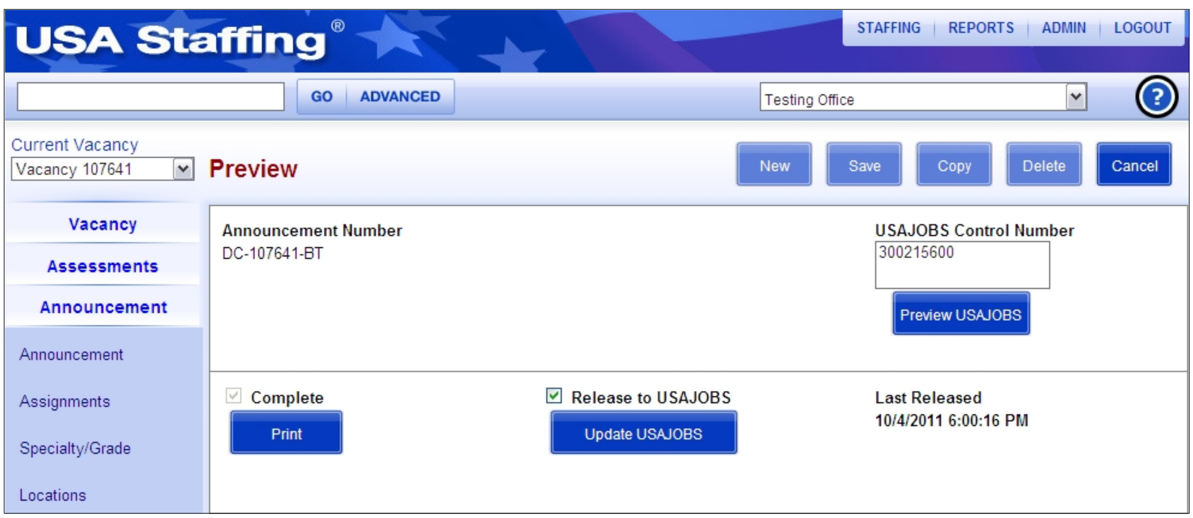
HOT TIP! When an announcement template used in a VIN marked Competitive only is not set to collect veterans' preference, military dates, or both items, a warning message displays when the Complete box is checked on the Announcement > Preview page. Users should make the appropriate corrections before releasing the announcements to USAJOBS.

Release to USAJOBS

Please verify the assessment and announcement content is accurate and complete prior to releasing the announcement to USAJOBS. Follow these steps to complete and release the announcement to USAJOBS:

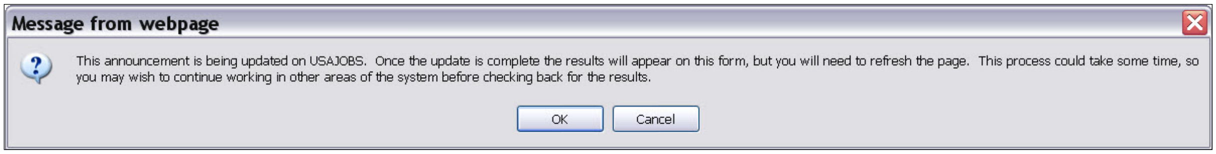
- Review your announcement to ensure it is free of errors and make corrections if necessary.
- When you have finished reviewing the content, click the Complete box. Allow the page to refresh before moving to the next step.
- When the Preview page refreshes and displays the announcement text, check the box titled Release to USAJOBS. If errors are present, the system will indicate in red those sections or items that need to be corrected.
- Once the box is checked, the system will display a message indicating the release is in progress.

Note: Refresh this page by selecting the Preview item on the left-hand menu. The system will populate the Last Released date/time and the USAJOBS Control Number in the upper right corner of the page. The Preview USAJOBS and Update USAJobs buttons will be activated. Should the release transaction between USA Staffing and USAJOBS fail, an error message will be displayed on the Preview page to inform you that the transaction failed and that you should retry to release/un-release the announcement.



- Click the Preview USAJOBS button to view the announcement in the USAJOBS format. This is exactly how your job will post to the public. You can select Print Preview on this page and save or email a copy of this announcement.

- The Update USAJOBS button should be used when any modifications or corrections are made to the announcement following its release. You must select Update USAJOBS to send your changes to USAJOBS.



- Un-checking the Release to USAJobs box will remove the announcement from the USAJOBS Web site. This should be done only when you are certain the announcement needs to be removed. Un-checking and then immediately checking the Release to USAJobs check box will cause problems and may cause an error in the announcement release. Remove jobs only when necessary.

Check Your Skills – Create a New VIN and Release an Announcement

Take 45 minutes to complete the tasks for this exercise. It gives you an opportunity to create a vacancy, retrieve an assessment from the library, develop an announcement, and release the job announcement to USAJOBS.

Note: In the training environment, your announcement can not be released to the live USAJOBS site; therefore, the Preview USAJOBS button will not give you a preview of your job announcement.

Create a new vacancy and attach a complete assessment from the Assessment Library. Then begin your announcement following the instructions below.

1. Create a new VIN. Write down your VIN: _______________
2. Retrieve an assessment from the Library. The instructor will provide information on the assessment to use.
3. Series and Grade ____
4. Assessment Name ____
5. Click the Announcement button.
6. Enter an announcement number.
7. Select the opening and closing dates from the calendar. For training purposes, set the open date to the current date.
8. Click the Save button.
9. Click the Internal Contact button.
10. Search for the Last Name of your Internal Contact.
11. Click the Go button.
12. Click the External Contact button.
13. Search for the last name of your external contact.
14. Click the Go button.
15. Click the Next button to go to the Assignments page.

16. Click the Next button to go to the Specialty/Grade page.

17. Select the appropriate specialties and grades. Enter the Promotion Potential Grade.

18. Click the Next button to go to the Locations page.

19. Enter the Total # of Vacancies.

20. Click the New button.

21. Select the appropriate Country or State from drop-down list. Select the appropriate City or County from the drop-down list

22. Select a location and enter the number of vacancies you have for that location.

23. Click the Save button.

24. Click the Next button to go to the Templates page.

25. The instructor will provide information on the template to use.

26. Table Type ____

27. Template Name ____________________________________

28. Click the Next button to go to the Overview page. Make changes to the Overview sections as needed.

29. Click the Save button.

30. Select Duties on the left menu bar to go to the Text Editor box. Make changes if needed.

31. Click the Save button.

32. Select Qualifications/Evaluation on the left menu bar to go to the Text Editor box. Make changes to each section as needed.

33. Click the Save button.

34. Select How to Apply on the left menu bar to go to the Text Editor box. Make changes to each section as needed.

35. Click the Save button.

36. Select Benefits/Other on the left menu bar to go to the Text Editor box. Make changes to each section as needed.

37. Click the Save button.

38. Select Preview on the left menu bar.
39. Check the Complete box.
40. Check the Release to USAJOBS box.
41. Click OK on the release message.
42. Select Preview on the left menu bar to refresh the page and receive the USAJOBS Control Number.

Applicants

- Application Manager – How Applicants Apply
- USAJOBS Account
- USAJOBS Application Status
- USAJOBS More Information Link
- Main Applicant Table
- Assessments
- Vet Preference
- Questionnaire
- Supporting Documents
- Application Information
- Biographic Information
- Referral Information
- Applicant Flags
- NOR Messages
- Notice of Results
- Letter Filter
- Report Information
- Mismatched Assessment
- Mismatched Documents
- Updated Documents
- New Applicant Records

The Applicant pages allow you to review and manage the content of the applicant records. You can use this section to view, add, and edit applicant information. Applicant records are associated with a specific VIN, allowing the system to rate each record against the associated assessment(s).

Applicant records are created by applications submitted online via Application Manager or by fax using the OPM Form 1203-FX. The system checks each application to ensure that all required information is complete. If the application is complete and free of errors, the system will process and rate the application, creating an applicant record for the VIN. If errors are identified, the system assigns the applicant record a pending status code.

Application Manager – How Applicants Apply

Application Manager facilitates the online application process for applicants applying to announcements advertised through USA Staffing. Application Manager provides a secure environment that presents the online questionnaire and accepts USAJOBS resumes and portfolio documents. Alternatively, the applicant can upload documents directly to Application Manager. If the applicant has applied previously, the system tracks each previous application providing status, documents submitted, and any correspondence sent by the hiring agency through USA Staffing. Also, Application Manager retains previously submitted documents and enables the applicant to reuse or resubmit those same documents to a new VIN, eliminating the need for them to fax or upload those documents for each application.

Application Manager improves the applicant's online experience with USA Staffing. Some features include:

- Assessment Questionnaire Interface permits customization
- Integrated with USAJOBS
- Application Package Checklist and Status update
- View and Print Answers to Submitted Assessment Questionnaire
- View and Print Notifications sent by the USA Staffing user

Terms and concepts to know:

- Application Package: everything needed to apply for the position, including answers to the assessment questionnaire(s) and supporting documents.
- Application Package Statuses: The applicant will see these terms when they look at the Checklist and Status displays:
    - Complete. Questionnaire and documentation received. No further action on the applicant's part is needed.

  Note: If you do not specify a required document such as resume in the Vacancy/Supporting Documents page, the applicant's package will show Complete even though a resume has not been attached to their application.

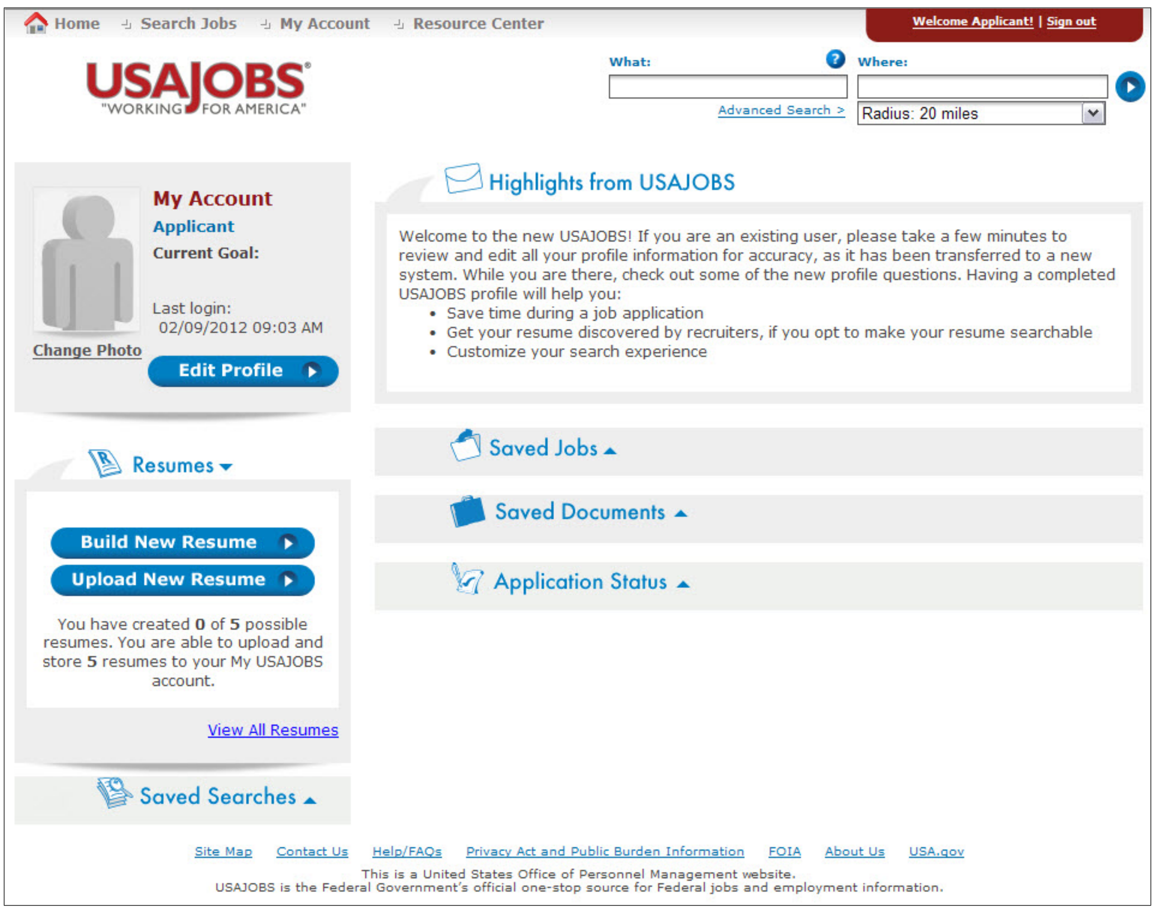
- o Incomplete. The applicant needs to take further action in order to be considered.
- o Pending. The system or the HR Specialist need to take action for the process to move to the next step.

You can view the Applicant Online Help at any time while working in Application Manager. Click the Help button in the upper right corner of the page.

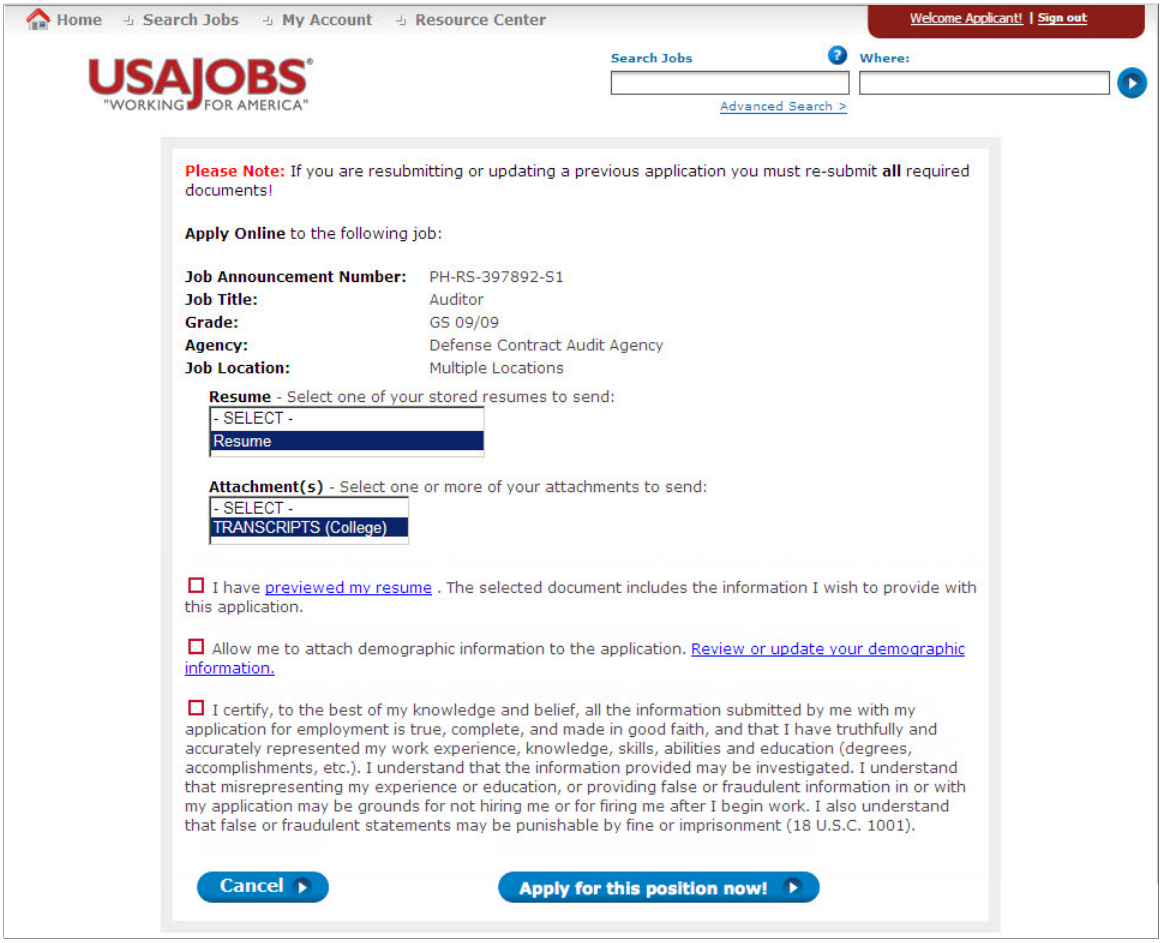
To apply for a vacancy through Application Manager, the applicant will take the following steps:

- Click the Apply Online button on the right side of the announcement.
- On the USAJOBS account login page, log into an existing account or create an account if they have not already done so.

In their USAJOBS account, applicants can create a resume using the resume builder or upload a new resume, and upload supporting documents.

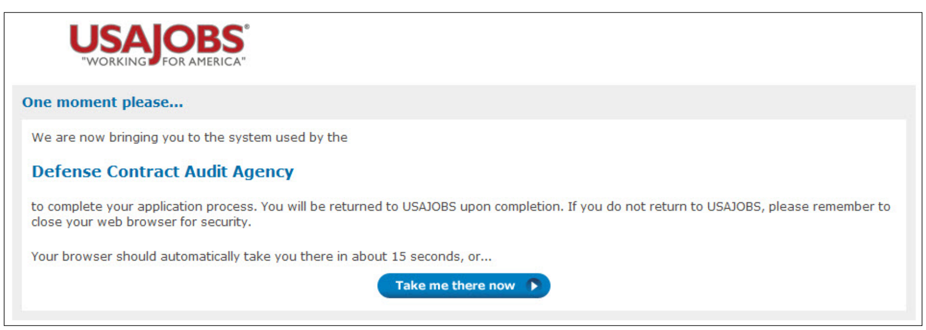


- Select the appropriate resume and attachments.

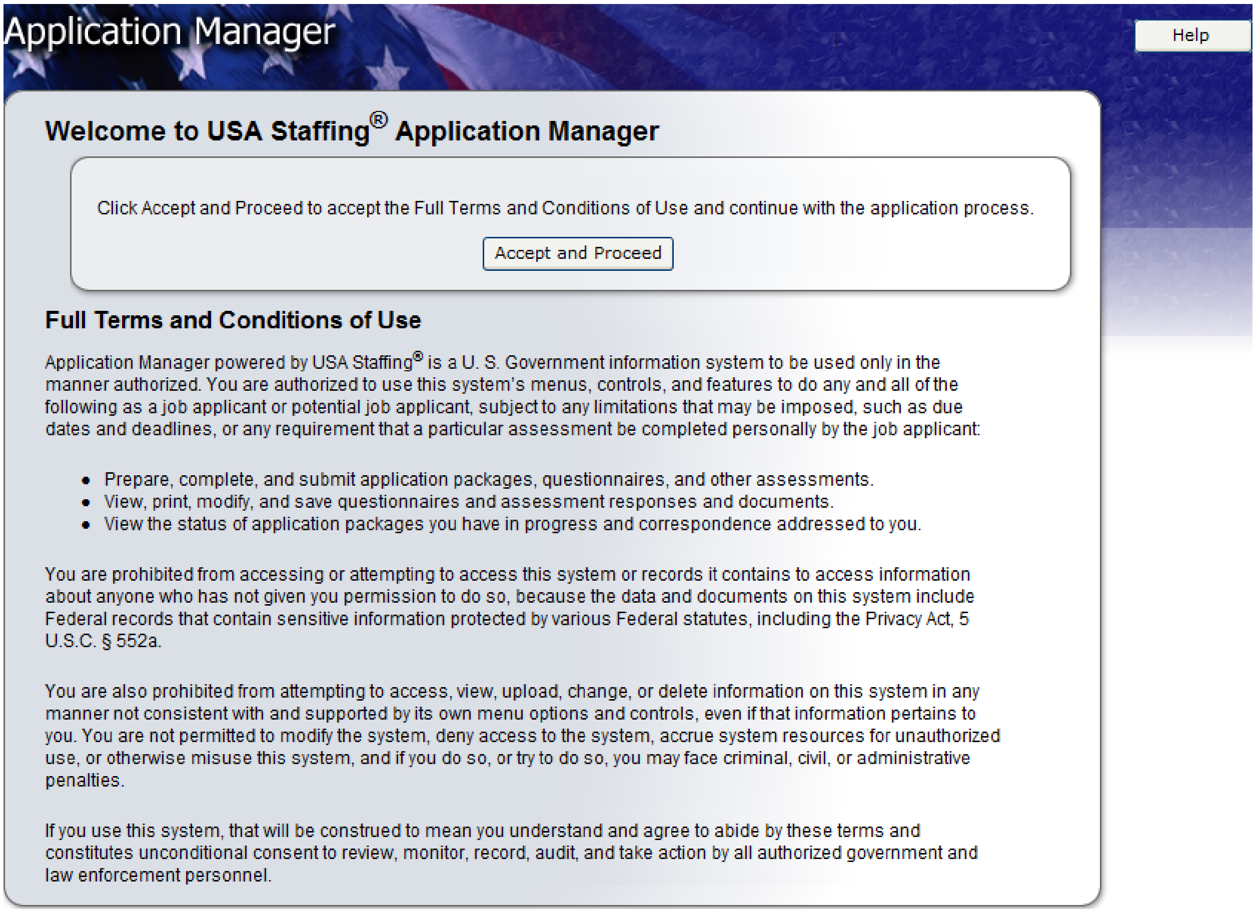


- Click the "Apply for this position now!" button.

Applicants are then routed to Application Manager to complete their application package.

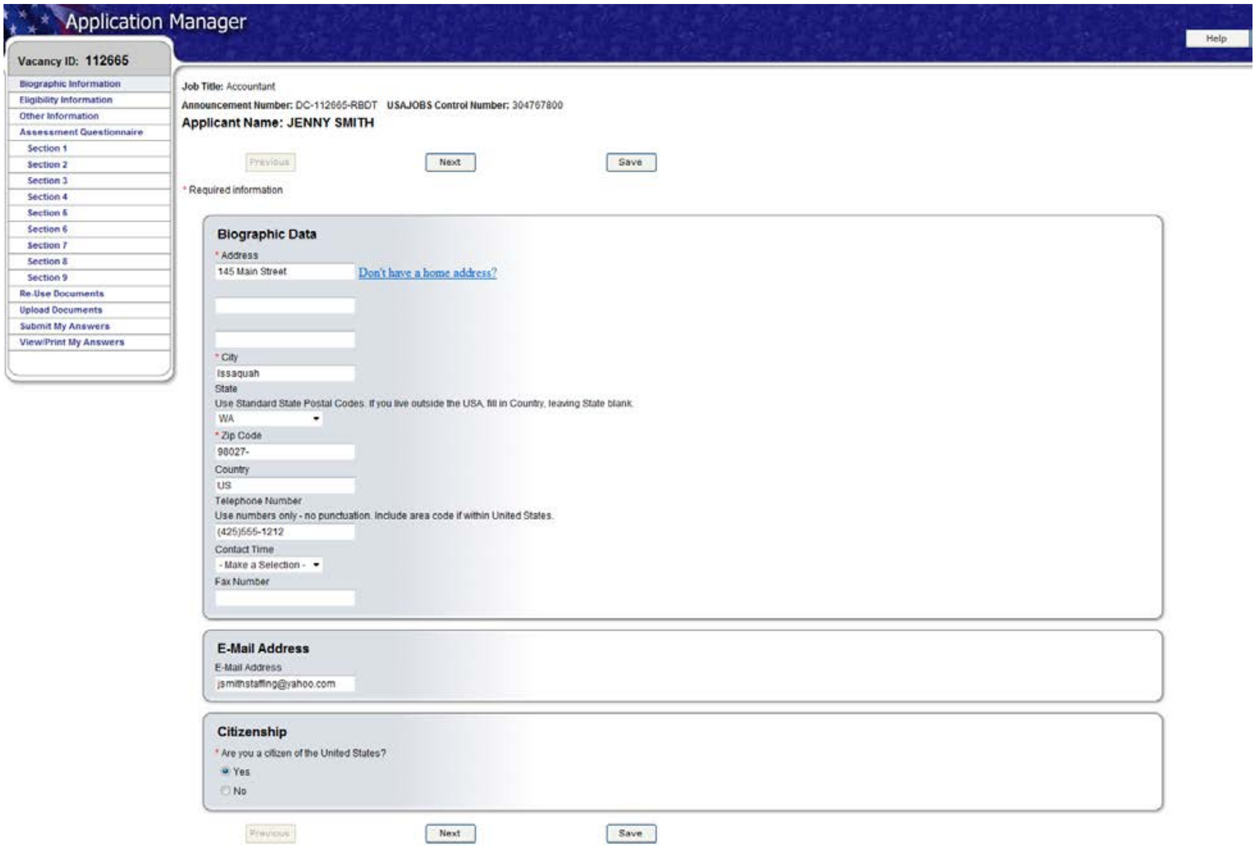


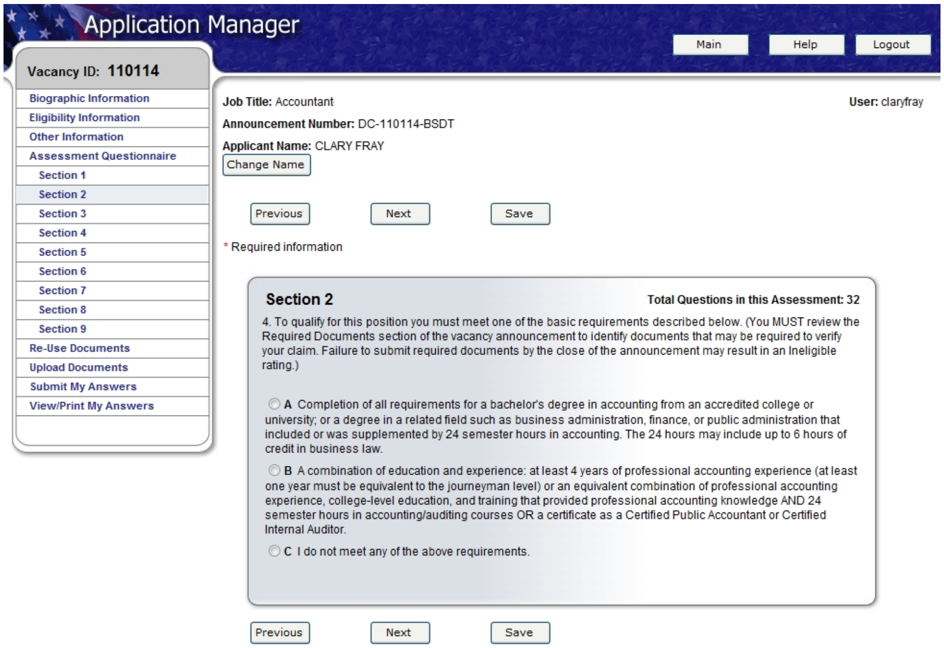
A welcome message requesting acceptance of the Full Terms and Conditions of Use notifies the applicant they are entering Application Manager.



The Biographic Data and other fields are pre-populated for the applicant with information contained in their USAJOBS and Application Manager profiles.

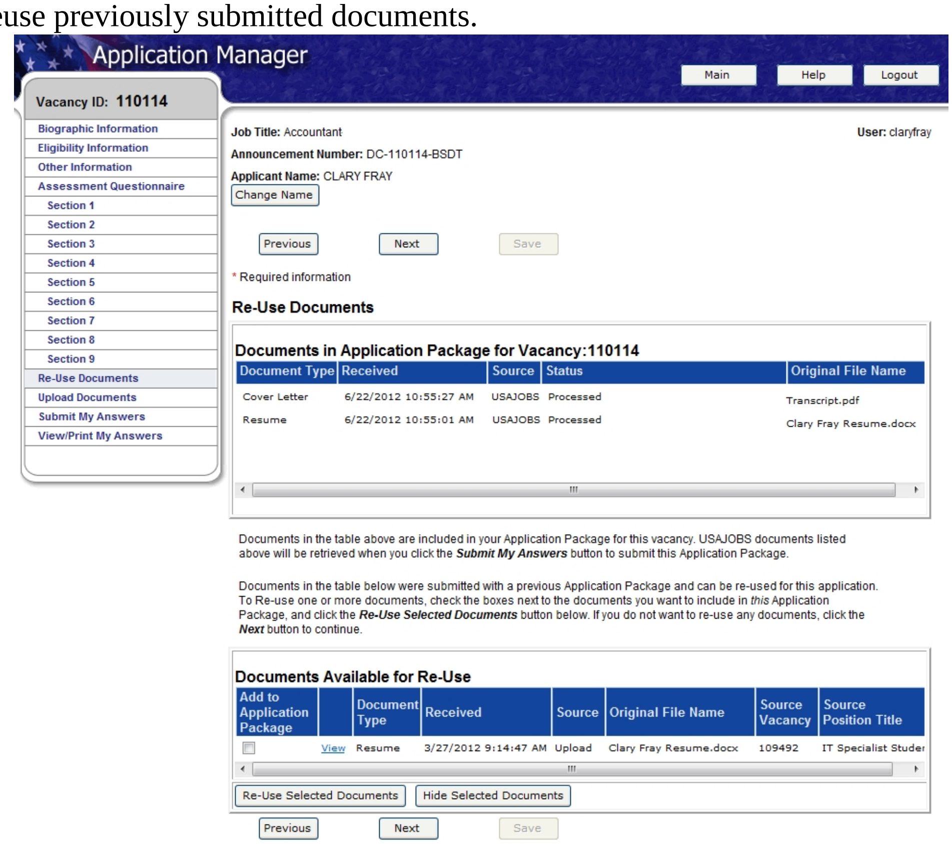
Each vacancy is associated with a questionnaire, containing various sections which are listed on the left side of this page under the Vacancy ID. This listing highlights the current page and provides the applicant with a visual cue, showing where they are in the process. See below where the applicant is in Section 2.





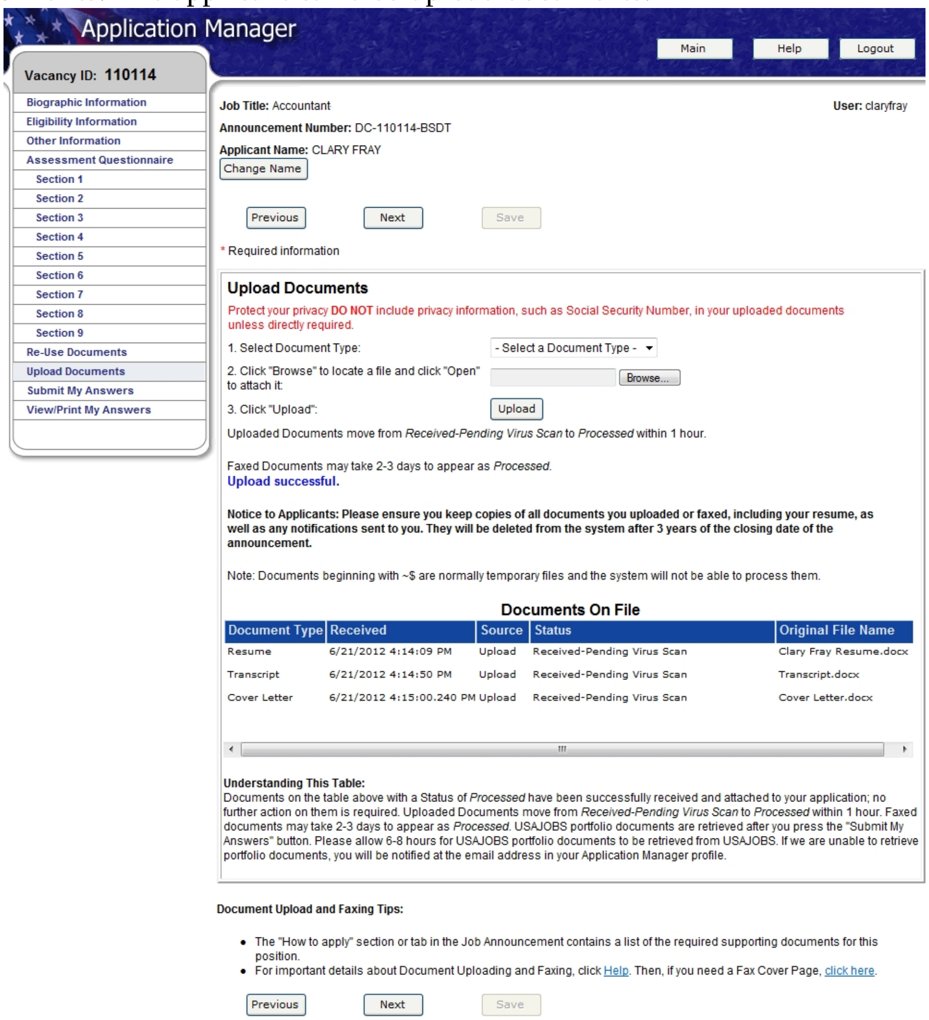
Applicants can navigate from one page to another by clicking the Next button or by clicking the item directly on the left-hand menu.

ReUse Documents. Once the applicant has responded to the questionnaire, they will have the option to reuse previously submitted documents.



The applicant would check the box in the Add to Application Package column and then click the Re-Use Selected Documents button at the bottom of the table. The selected documents will load to the upper table indicating they are now included in the application for this vacancy. Once the selected documents are loaded, the applicant will click the Next button.

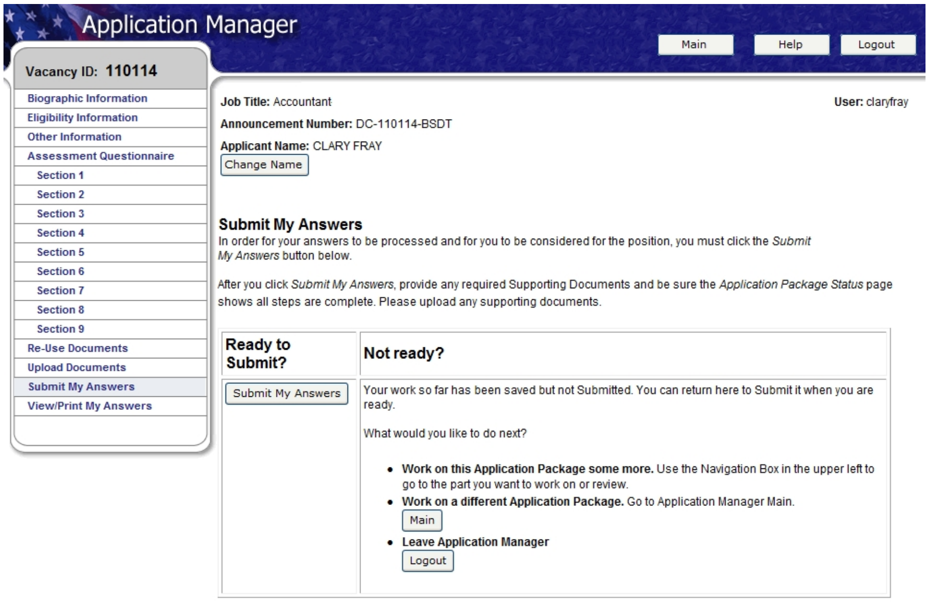
Upload Documents. The applicant can also upload documents.



The Upload Documents page allows the applicant to select the document type. The document types displayed in the drop-down list are based on the documents marked as Accepted on the Vacancy > Supporting Documents page.

- Click the Browse button, retrieve a file, and load that file to their application for this vacancy.
- This process can be repeated to load additional documents.
- This page also contains a link in the lower right area for the Fax Cover Page. This cover page is pre-populated with the Vacancy ID and the applicant's SSN and name based on the information provided in the Biographic Information section of this application.

Submit My Answers. Once the applicant is done on the Upload Documents page, clicking the Next button will take them to the Submit My Answers page. This is the final step in the application process. If the Submit My Answers button is not selected, the applicant's questionnaire responses and supporting documents will not be submitted for this vacancy. USA Staffing will not have a record of the application and their Application Manager status will read Not Submitted.

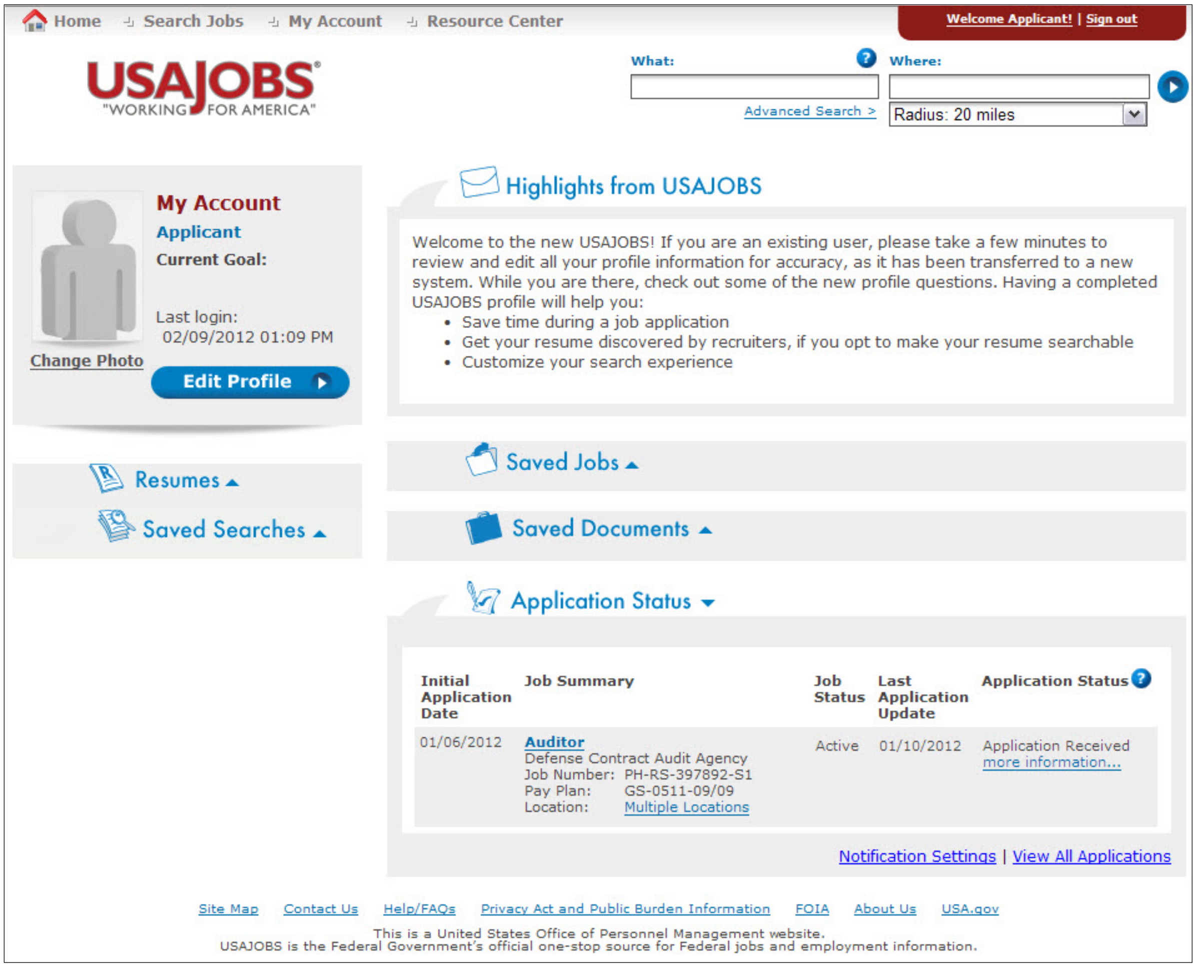


Once the questionnaire and any supporting documents are submitted, the applicant will receive a confirmation message when the page refreshes, indicating that the application was successfully submitted to USA Staffing. This message confirms that the questionnaire was submitted; it is not a confirmation that all supporting documents were received.

Once USA Staffing detects a new application, an acknowledgement email is sent to the email address provided by the applicant unless the acknowledgement email configuration is turned off in the Administration area. This acknowledgement email confirms that the questionnaire was submitted successfully and is not an acknowledgement that all supporting documents have been received. A copy of this email is placed in their Application Manager account under the Details tab for this vacancy. Another copy of the email is placed in the applicant's record for this VIN under the Report Information page. The Details area also displays the assessment status, document submitted status, and any correspondence sent from the agency, as well as the application package history. Transmission of the acknowledgement email updates the status in USA Staffing and USAJOBS.

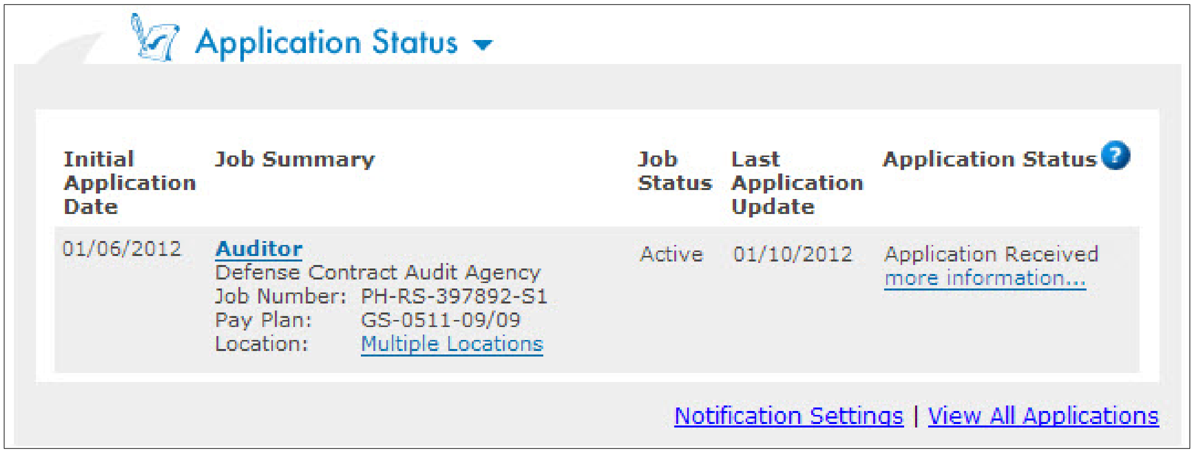
USAJOBS Account

Applicants will receive updates through their USAJOBS account. When an applicant logs into their account, they have several options:



- Set up a saved search to automate their job searches.
- Edit or create new resumes, or upload supporting documents.
- Edit their profile.
- Check the status of their applications.

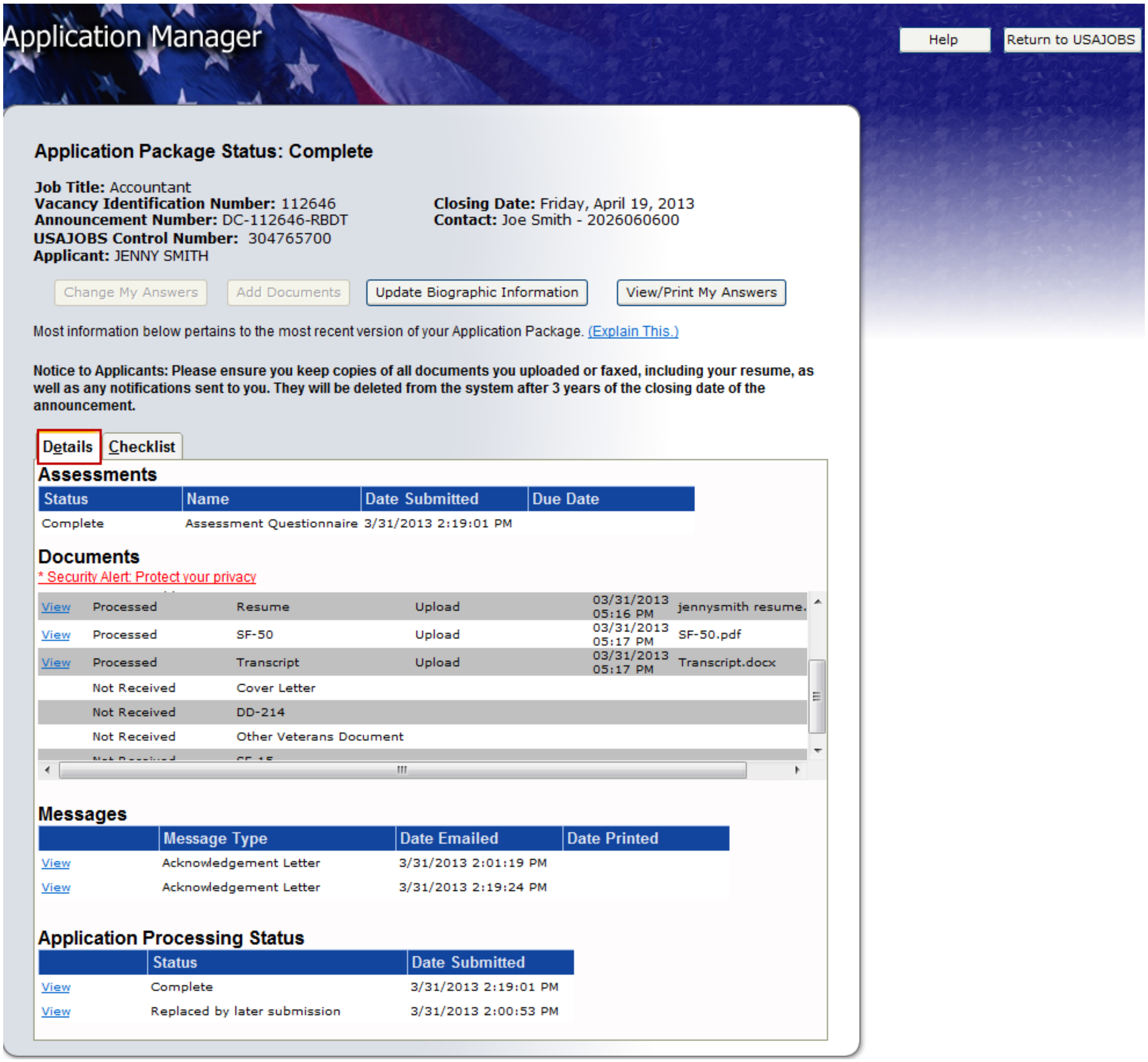
USAJOBS Application Status



This displays the USAJOBS Application Status page within an applicant's account. The Application Status column displays Application Received. This status will change as the application progresses through the evaluation and referral process in USA Staffing. As Notice of Results (NOR), Notification, or Disposition Letters are sent to the applicant, the Application Status will change. If applicants want more information, they can click the "more information" link (shown above).

USAJOBS More Information Link

Selecting the more information link directs the applicant to the Details tab for this application in Application Manager.



The Change My Answers and Add Documents buttons on this page remain active until the closing date of the announcement. Once the announcement is closed, these buttons will be grayed out. The Details tab includes the following detailed information for the applicant:

Assessments. Shows the status of the assessment questionnaire or other components.

Documents. Displays the documentation received for this application. The documents displayed here are the same documents that the applicant record displays. The documents are displayed by type, date received, and status, and can be viewed in PDF format.

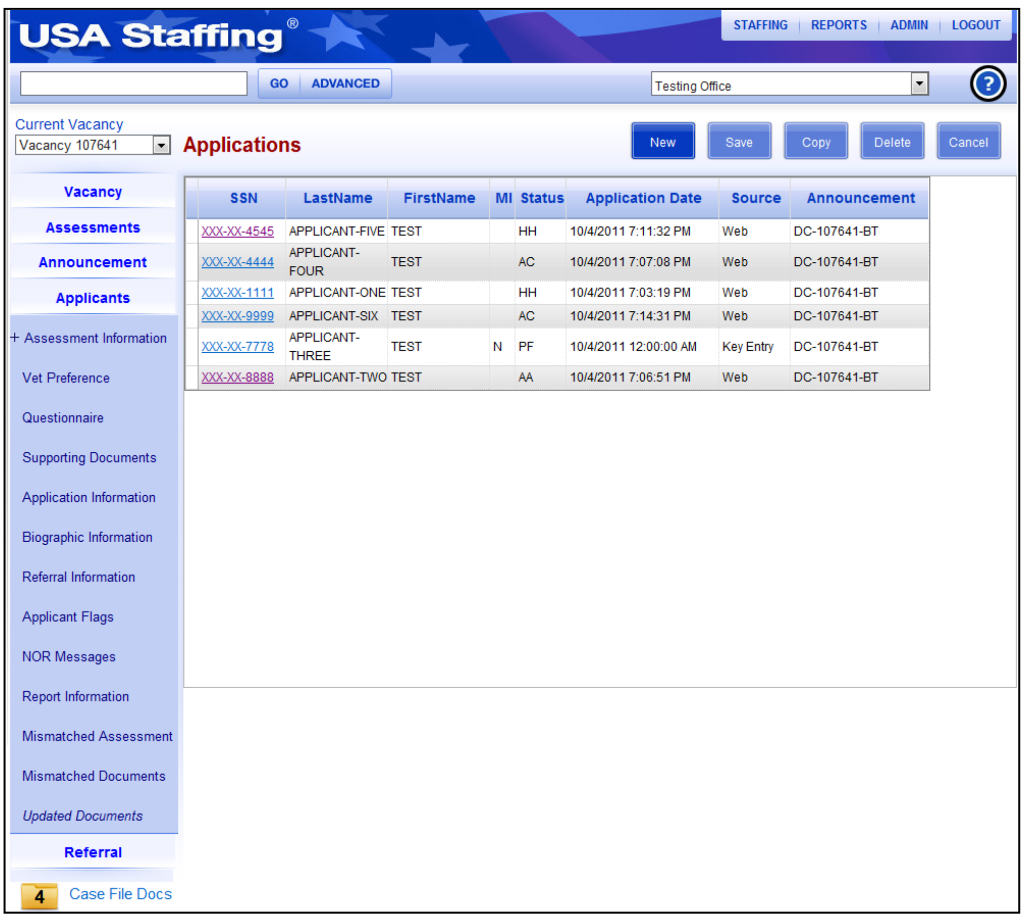
Messages. Displays any correspondence sent to the applicant for this announcement.

Application Processing Status. Provides a link (“View”) that displays the questionnaire and responses provided, as well as the status and date submitted.

Note: The Details tab clearly shows the documents received (Processed) for this application. When you respond to applicant inquiries about documents received, you can reference the applicant back to their Application Manager account to verify what was actually received. The documents displayed on this page are the same documents that appear in this applicant’s record in USA Staffing. Applicants can and should verify these documents were processed prior to the closing date of the announcement.

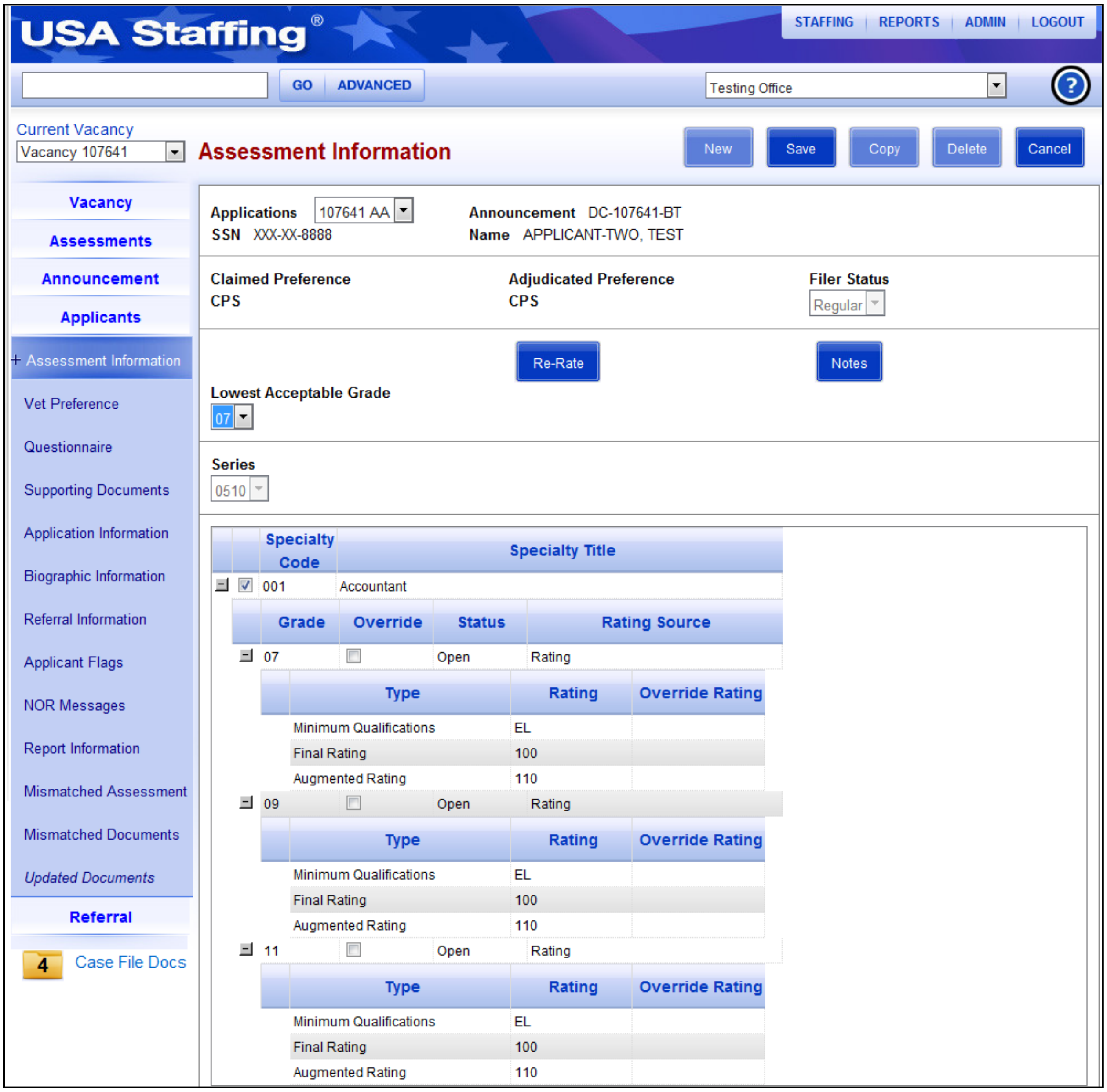
Main Applicant Table

This table displays applicants who have completed the application process for this VIN. The status column displays the applicants’ record status. Applicants whose record status begins with “A” are active and available; record statuses of “IN” are inactive and ineligible. A record status beginning with “P” is in Pending status and typically requires additional action. For additional information regarding record status codes, see Appendix E. To access an applicant’s record, click the “SSN” link. The Assessment Information page for that applicant will display.



Assessment Information

The Assessment Information page shows applicant-specific information for this VIN.



The Assessment Information page is shown above. The bottom half of the screen has a table containing the specialty (or specialties) and grade(s) for which the applicant has been rated.

The top part of the page has the following information, which cannot be modified from here:

- **Applications.** This area will display the current VIN and Record Status Code in a drop-down list. The drop-down will also list any duplicate records for this VIN as well as any other VINs the applicant has applied to for this office.

- **Announcement.** This is the job announcement number assigned in the Announcement area of the VIN.
- **SSN.** This displays the last four digits of the applicant's Social Security Number.
- **Name.** This displays the applicant's name.
- **Claimed Preference.** This displays the veteran's preference claimed by the applicant during the application process.
- **Adjudicated Preference.** This indicates if the applicant's veteran's preference claim has been adjudicated and what it has been adjudicated to based on supporting documentation.
- **Filer Status.** This box displays when the application was received with regard to the open period. The four possible status indicators are:
  - Regular. The application was received during the normal open period.
  - Delayed Filer. The application was received after the open period, but the applicant is entitled to be rated; for example, recently discharged veterans.
  - Late. The application was received after the closing date, and the applicant is not entitled to be rated.
  - Re-Opener. The applicant is entitled to re-open announcements that are closed; for example, disabled veterans.

Below are definitions of other items displayed on this page:

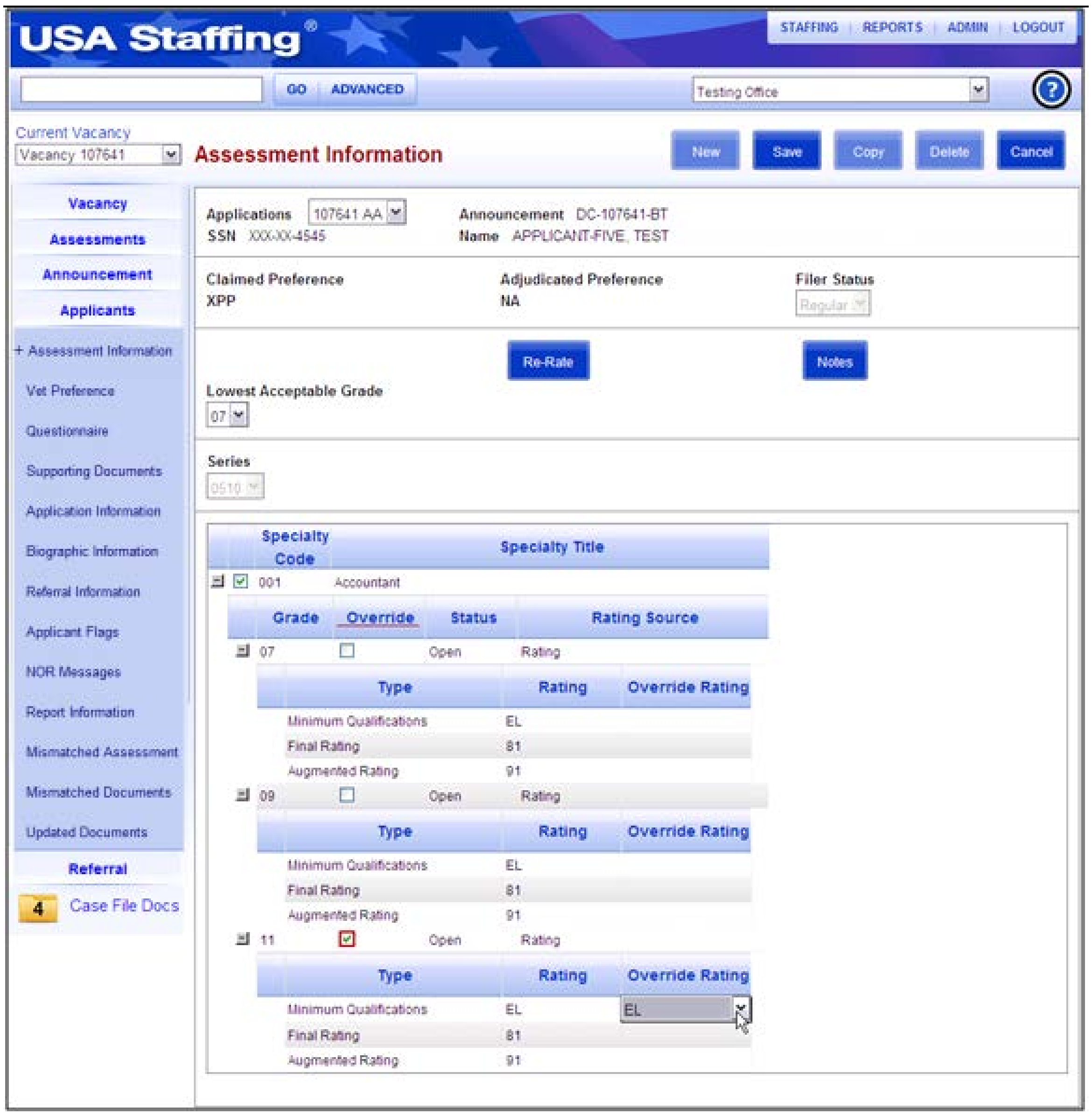
- **Lowest Acceptable Grade.** The grade displayed was selected by the applicant as the lowest grade they will accept. Applicants will not be rated or referred for any grades below the one shown.
- **Series.** This box displays the series of the rating information. If more than one series was used in the vacancy—because it was interdisciplinary—you can switch to view assessment information for a different series. To do this, click the down arrow on the Series drop-down list, and click the series you want to view. The table will refresh. If the position is not interdisciplinary, this box simply shows the series.
- **Request.** If the vacancy is interdisciplinary or uses Deferred Rating, multiple referral requests may be associated with it, and an applicant may have different ratings for each of the requests. The Request box shows the request number for the rating information on the table at the bottom of the page. To see the rating information for a different request, select the Request number from the Request drop-down list.
- **Status.** This field indicates whether the Occupational Specialty (OSP)/Grade combination was open or closed at the time the applicant applied.

- **Override.** This feature allows you to change an applicant's rating or eligibility based on quality review.

To override a rating, follow these steps:

- Click the Override check box for the specialty and grade you want to override. The system will place a checkmark in the Override box as a visual indicator that the rating is the result of an override action and the Rating Source will change from Rating to Override.

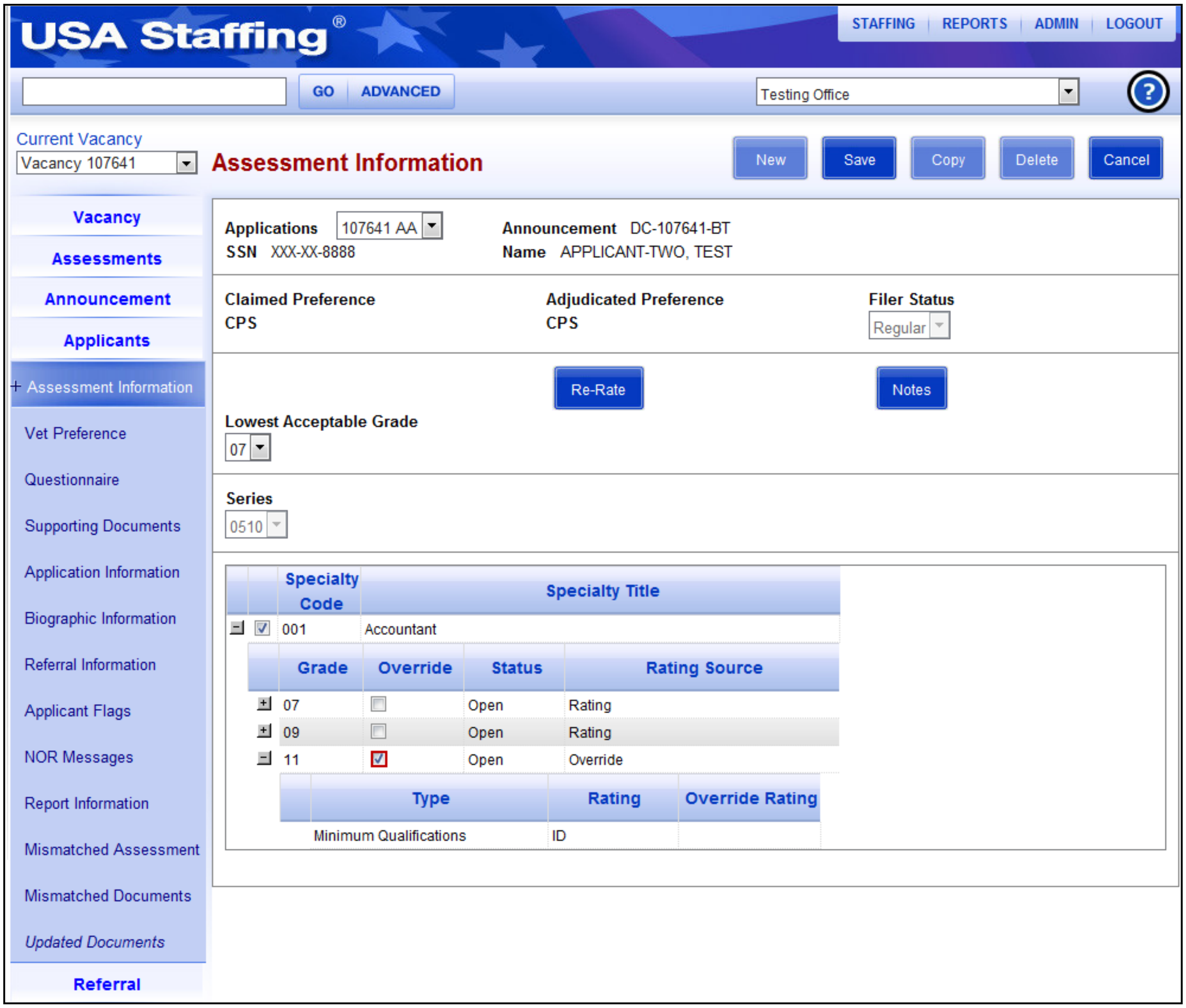
- Click the field in the Override Rating column on the Minimum Qualifications row. Select the new override rating you want to assign from the drop-down list. The numeric ratings are at the bottom of the list. The codes displayed in the drop-down list are pulled from the NOR Messages area in the Administration area under Preferences. (See Appendix C for a list of NOR Message Codes.)



- Click the Save button to refresh the page and update the Rating and Rating Source.
- Document the reason(s) for the rating override in the Notes area.

To undo a rating override, follow these steps:

- Remove the Override checkmark.

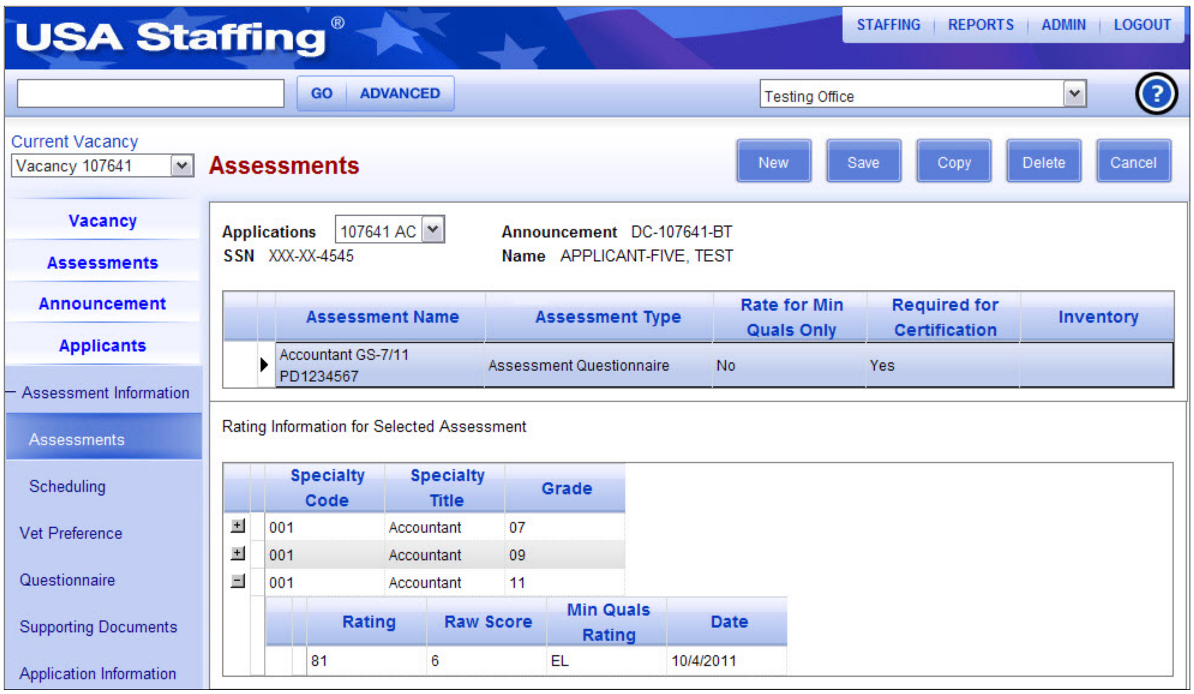


- Click the Save button to refresh the page. The Rating Source will change to "Rating," and the rating will revert to the original value.
- Re-Rate. To re-rate an applicant, select the Re-Rate button. This button is used when changes have been made to the applicant record that will impact the rating; typically used with deferred rating methods. There is a Re-Rate button on the Vacancy/Position Information page, which can be used to re-rate all applicants for the VIN.

Assessments

This page lists the assessment(s) for an applicant for a specific VIN. Here, you enter the results for any assessment component that is not automatically matched during the Assessment Matching Process (including Manual Rating scores). Information on this page is read-only when:

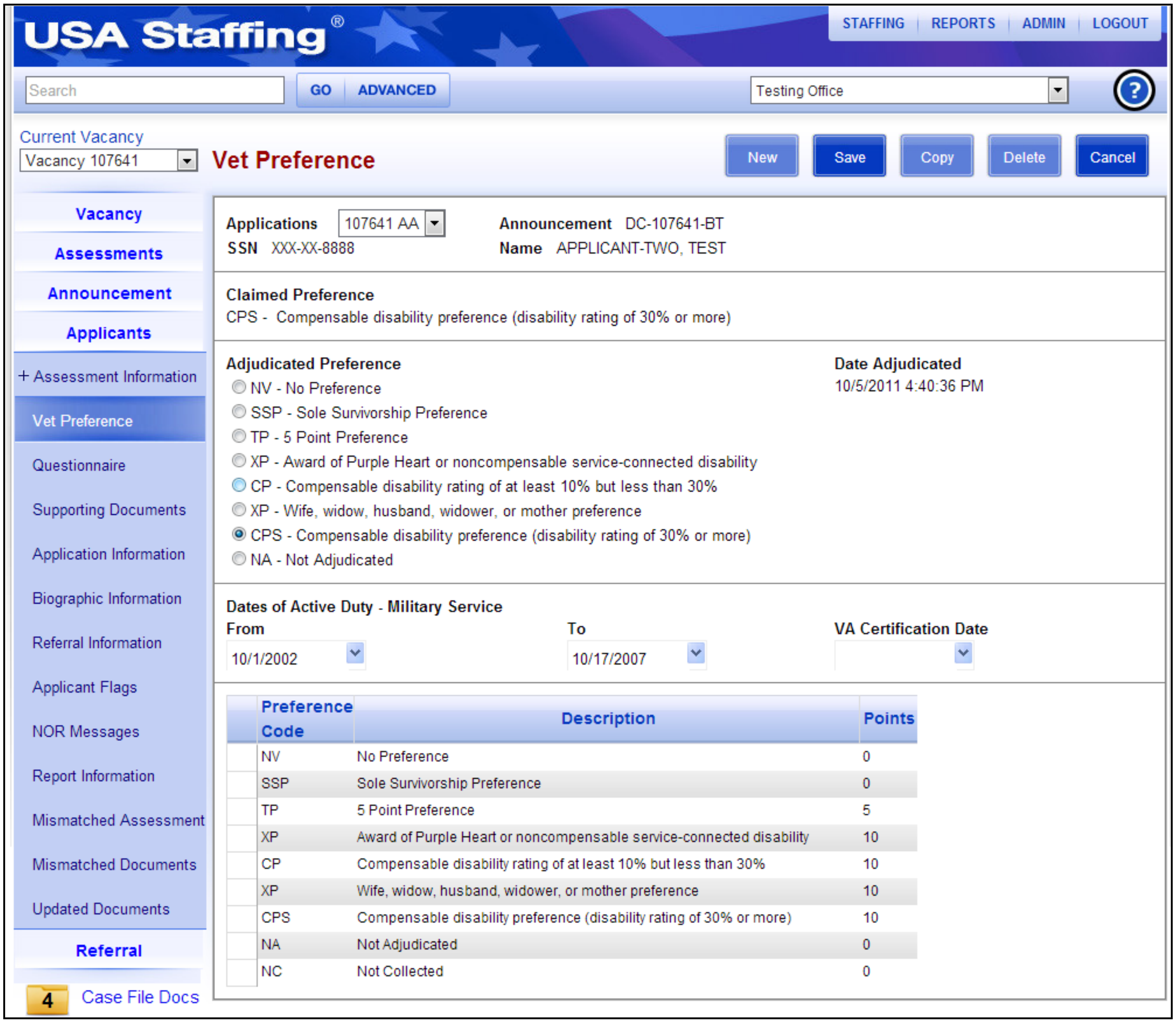
- Scores are for an Assessment Questionnaire.
- Your Permissions Profile does not allow you to access this area.



Below are the descriptions of the items displayed on this page:

- **Assessment Name.** Click the assessment name to view the detailed results of a particular assessment.
- **Assessment Type.** This indicates the type of assessment used.
- **Rate for Min Quals Only.** This indicates if the assessment was used to determine minimum qualifications only.
- **Required for Certification.** This indicates if the assessment was required for the applicant to be certified.
- **Inventory.** This feature is currently not used.

Vet Preference



When applicants claim veteran's preference, you adjudicate that claim, i.e., decide if they have a valid claim. The Vet Preference page is where the preference is adjudicated based upon supporting documents.

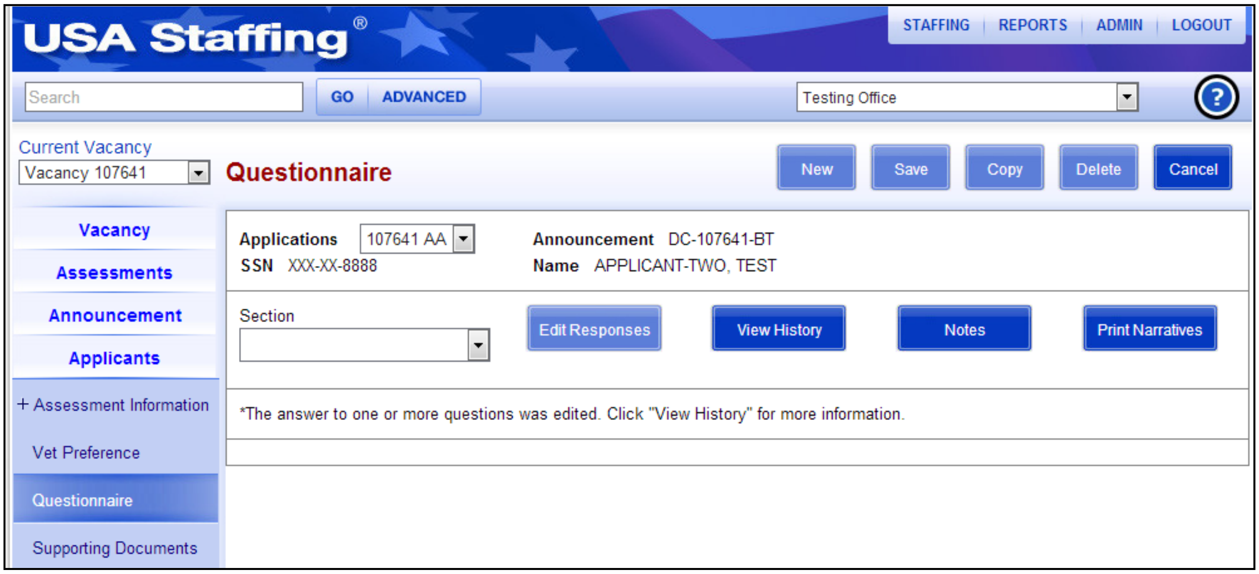
To adjudicate a veteran's preference claim, follow these steps:

- Select the radio button for the appropriate veteran's preference in the Adjudicated Preference section. Click Save.

- If the adjudication changes the veteran's preference claim, the system will adjust the applicant rating. You must click the Save button on this page to reflect the change in preference and any changes to the applicant rating.

- You can also document the dates of Active Duty Military Service that you used to adjudicate the preference and the date of the VA Certification Letter by clicking the drop-down lists and selecting the dates from a popup window calendar.

Questionnaire



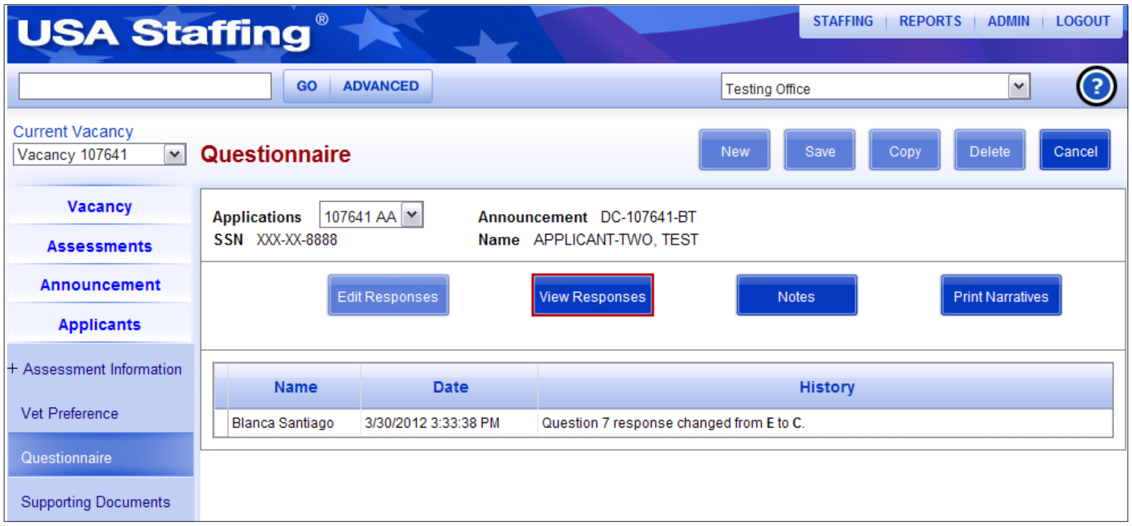
On this page, you can review the responses the applicant provided to the questionnaire. Users with the appropriate permission profile can edit applicant responses on this page. Users with permission to the Applicants section can view an audit history of changes made to an applicant's assessment questionnaire response(s). The page initially looks like the screen above.

Section. This drop-down list displays all the questionnaire sections. You can review responses provided to the minimum qualifications and/or rating factors by selecting the applicable section To view the applicant's responses for a specific section, select the section from this drop-down list. Once a section is selected, the page refreshes and the lower section of the page displays a read-only view of the applicant's responses for the selected section.

Edit Responses. This button allows users with the Applicants > Organization Access permission level to modify applicant responses for the selected section.

View History. This button changes the read-only view of the Questionnaire page and allows users to see a system-level audit history of changes made to applicant assessment questionnaire responses. This view displays the full name of the USA Staffing user who changed the applicant's response(s), date, time, and details of the changes. The View History button is replaced with the View Responses button once clicked.

Note: Changes made to the applicant announcement questionnaire responses (for example, Employment Availability) are not available through the View History button at this time.



View Responses. This button allows users to exit the history view and return to the default Questionnaire page view.

Notes. Click this button to enter notes for the applicant record if applicable. For example, you can enter notes when changing an applicant's responses to document the reason for the changes made.

Print Narratives. If the questionnaire included narrative responses, you can view or print the responses provided by the applicant. Applicants who submitted an OPM Form 1203-FX may not have narrative responses. Faxed applications may have narrative responses included in the supporting documents submitted.

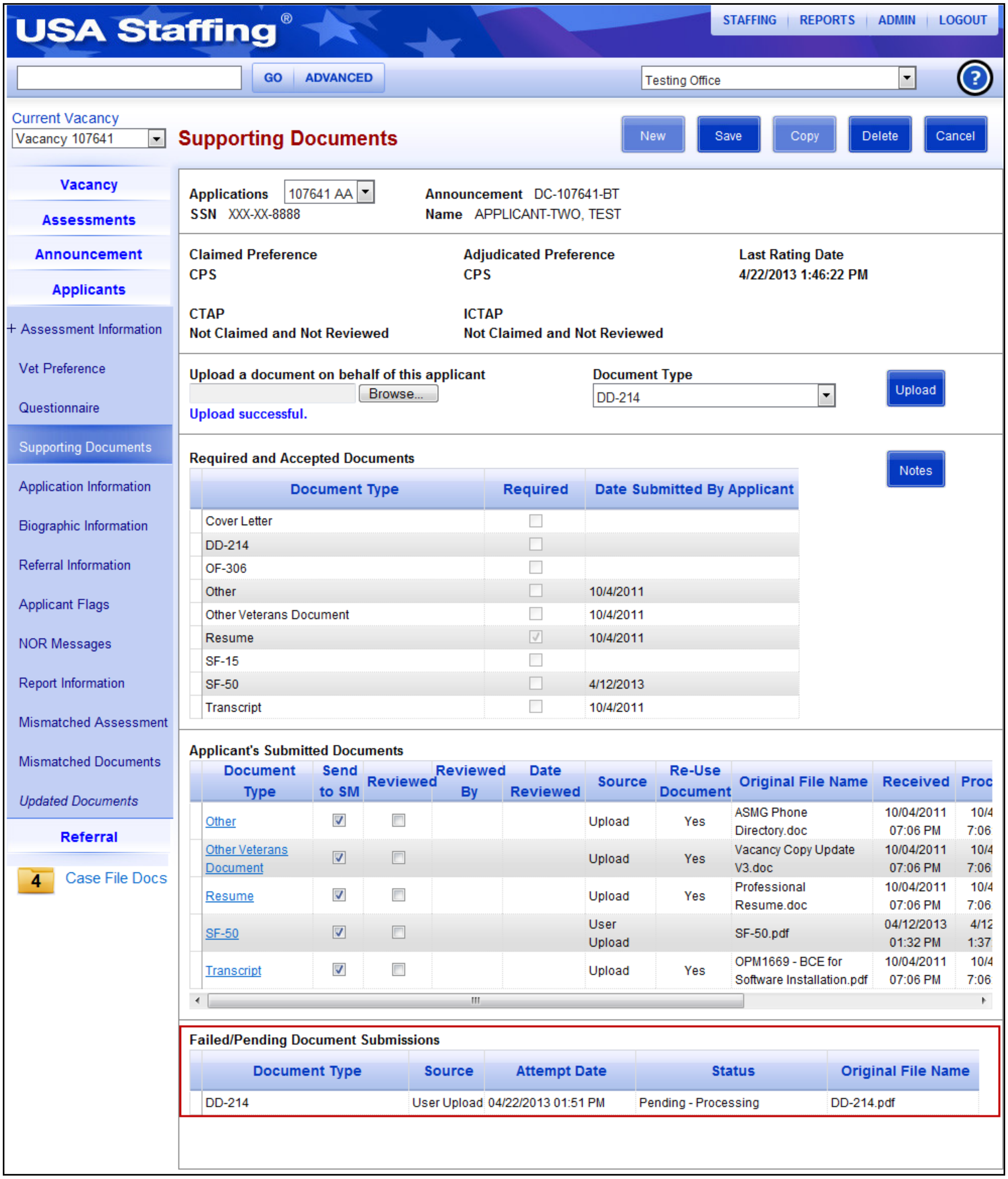
Users with the Organization Access permission level assigned to the Applicants section can change questionnaire responses on an applicant record by following these steps:

- Select the appropriate questionnaire section from the Section drop-down list to view the specific area of the questionnaire. The page refreshes and displays a read-only view of the section selected.
- Click the Edit Responses button. This activates the page for editing.

- Make the appropriate changes and click the Save button. The system displays the following confirmation message: “You have edited this applicant’s answer choice. Do you wish to save?”
- Click the OK button to proceed.

Note: All response changes are recorded in the system and can be viewed through the View History button.

Supporting Documents



On this page, there are two standard tables and one possible table below the display of the applicant's SSN and Name:

- **Required and Accepted Documents.** This table lists the document types that were selected on the Vacancy/Supporting Documents page. Required document types will hold the applicant record in a pending forms (PF) status until that required document type is submitted by the applicant.

- **Applicant's Submitted Documents.** This table shows the documents the applicant submitted by type, source (faxed, applicant upload, user upload, or USAJOBS), date received, processed, and matched to the record. It also provides a "Send to SM" column where users can choose which documents to send to the selecting official when the certificate is sent electronically. This SM designation stands for Selection Manager. Selection Manager is an interface that selecting officials can use to view certificates and applicant documentation and make tentative selection decisions. The process of sending certificates to hiring officials electronically is discussed further in the Referral area. There is a Reviewed checkbox allows you to indicate that a review of the document has occurred. Once a checkmark is placed in that box, the Reviewed By and Date Reviewed boxes will automatically populate.

- **Failed/Pending Document Submissions.** Please note this table will only be visible if there are any failed or pending document submissions for the applicant. This will let users easily see if there are any documents the applicant attempted to submit that are still in pending status or failed to be processed, prior to making a final determination to override the record for missing documents. Specifically, this table will include Pending documents waiting to be retrieved from USAJOBS or awaiting virus scan if uploaded directly in Application Manager. This table will not include pending faxed documents.

These are the actions you can take on this page:

- To view a document, click the Document Type link. That document will open in PDF format. You must have Adobe Reader Version 6 or higher to view documentation in USA Staffing.

- The **Upload a document on behalf of this applicant** section allows you to upload documents to the applicant record. Uploaded documents are initially listed in the Failed/Pending Document Submissions table pending virus scan. After documents are processed, they will appear in the Applicant's Submitted Documents table.

  To upload a document into an applicant's USA Staffing application record on his or her behalf:

    - Click the Browse button to locate the file. The file size must be 3MB or less and the acceptable formats are non-encrypted JPG, PDF, TXT, RTF, DOC, DOCX, and WPD.

    - Select the Document Type from the options available in the drop-down list.

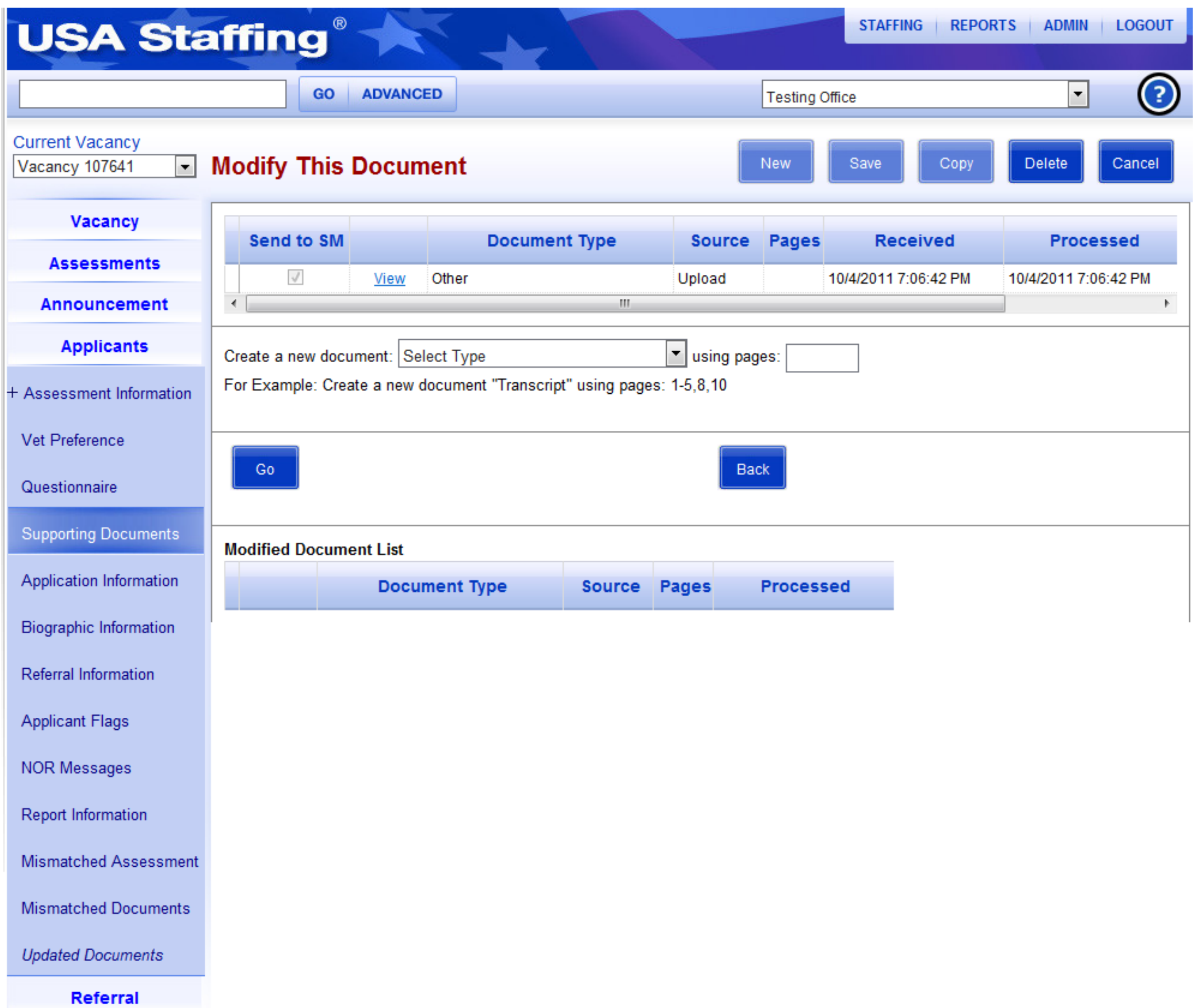
    - Click the Upload button.

Note: Applicants can view documents uploaded to their USA Staffing record in the Application Package Details tab on Application Manager. In addition, once a user uploads a document, the applicant will be able to re-use that document for future applications. These re-used documents will indicate User Upload as the document source.

- The Modify option allows you to convert one document type into another. For instance, a resume may have been uploaded including transcripts and veterans documentation. The Modify function will allow you to separate the transcripts and the veterans documentation from the original resume. To use the modify option follow these steps:

    - Click the Modify link next to the document type.

    - The page will refresh to the Modify This Document page as shown below.

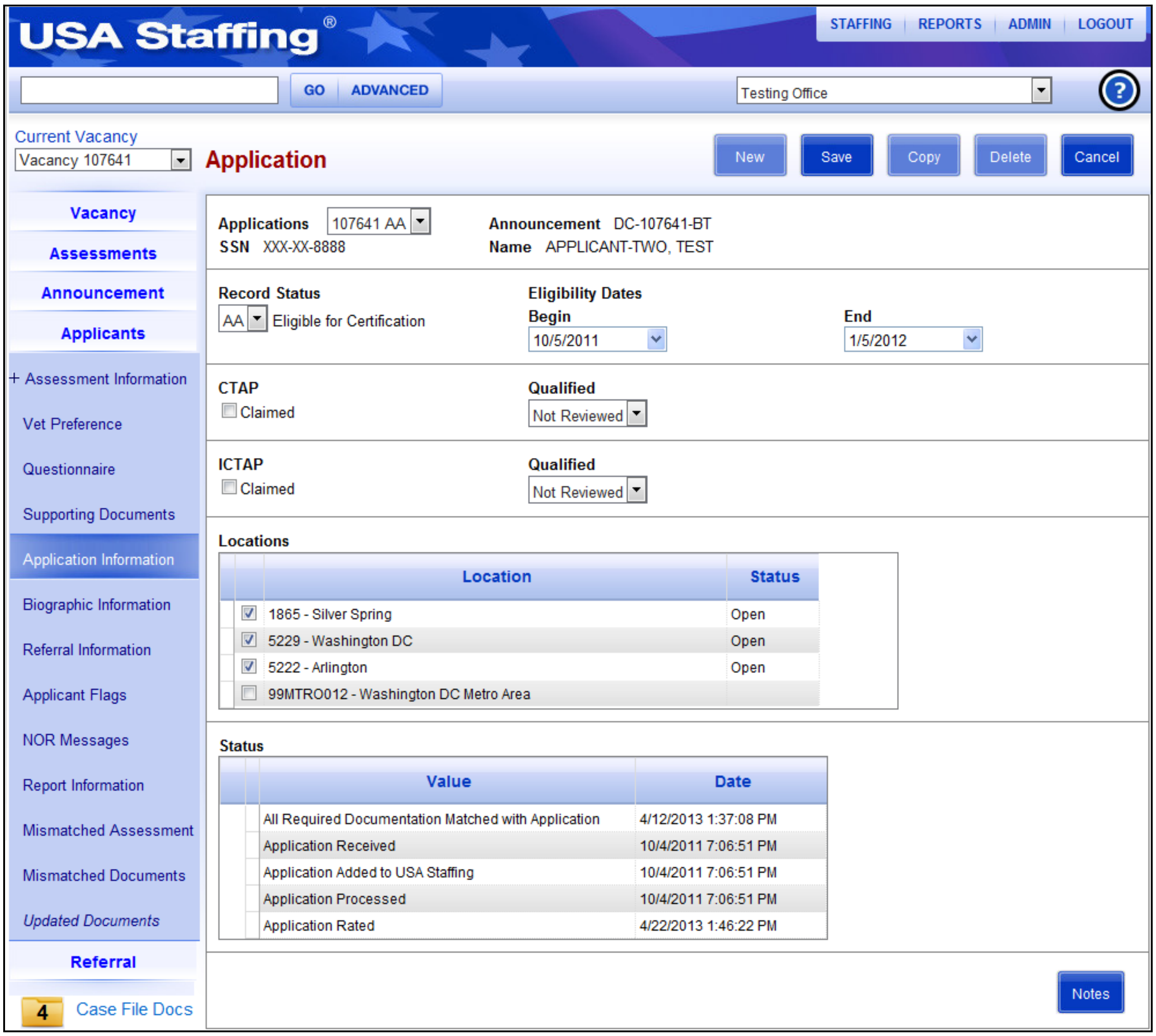


    - Select the new document type you would like to create from the drop-down list.

- Indicate the page numbers from the original document to be used for the new document type.
- Click the Go button. The new document type will appear in the Modified Document List as well as the Applicant's Submitted Documents table on the main Supporting Documents page.

Note: The original document selected to modify will retain all pages originally submitted. The Modify function does not remove pages; it simply copies and creates a new document type. Modifying documents may affect the documents sent to the selecting official using the Send to SM function.

Application Information



The Application Information page provides record status, eligibility dates, CTAP/ICTAP preference, and locations based on an applicant's most recent application.

Applications. This drop-down displays all VINs the applicant has applied to, as well as the record status code for each.

Record Status. This shows the applicant's current record status for this VIN. The code in this box determines whether the applicant will appear on a Referral List/Certificate. Applicant with a record status code (RSC) of IN are ineligible. Applicants with an RSC beginning with P, for example PF, are pending. Ineligible and pending applicants will not appear on certificates. (See Appendix E for the List of Record Status Codes.)

Eligibility Dates: Begin/End. The system automatically populates the Eligibility Begin Date when the application is rated. The Eligibility End Date is calculated based on the period of eligibility set on the Position Information page. You can manually enter a new Eligibility End Date to extend an applicant's eligibility. To do this, type in a date or click the down arrow on the date box to use the calendar.
For ineligible applicants, the Eligibility Begin and End Dates are the date of application or the date the record is overridden.

CTAP/ICTAP Claimed. These boxes will indicate the applicant's claim of CTAP/ICTAP eligibility on the questionnaire.

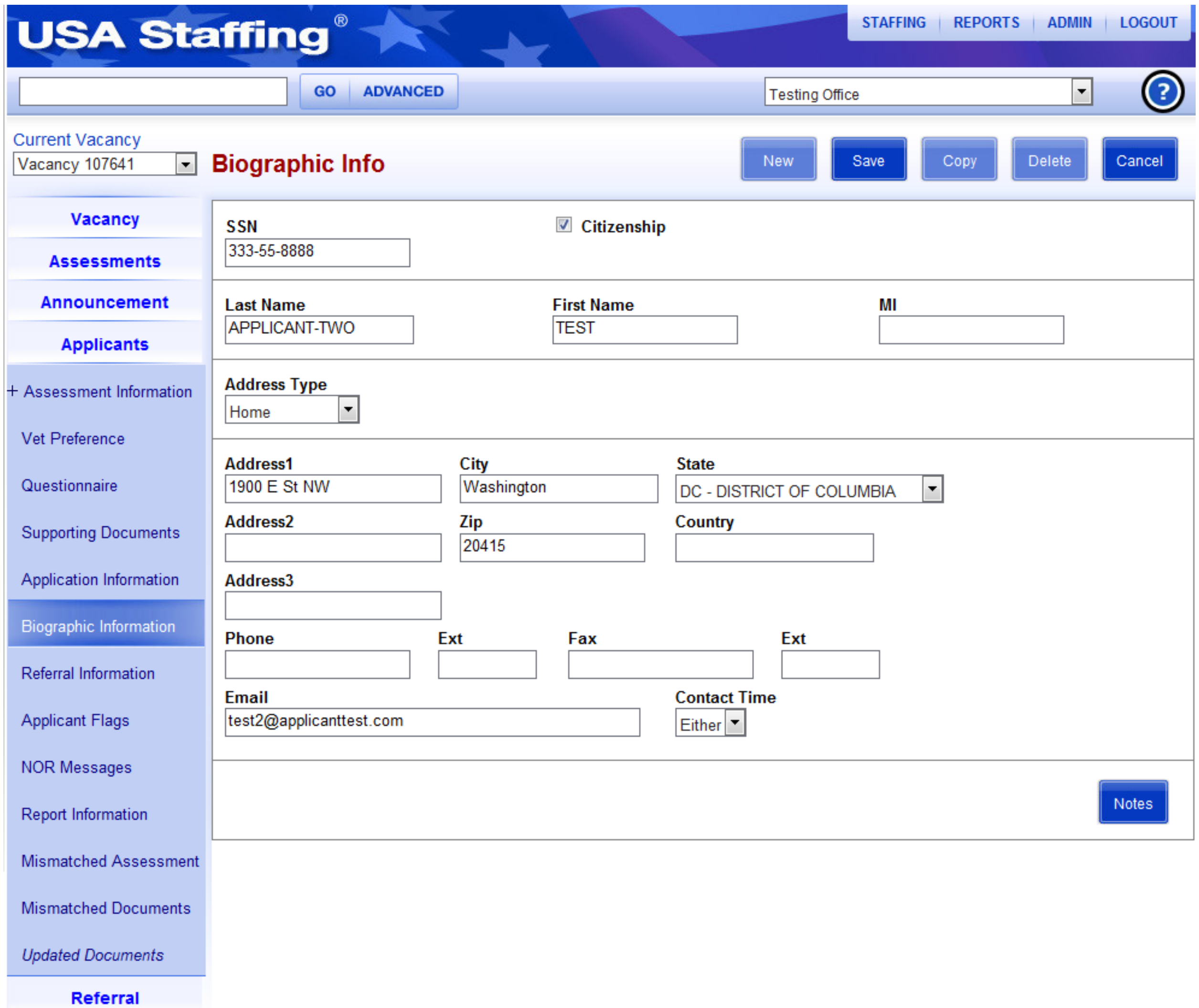
CTAP/ICTAP Qualified. Click on the drop-down list to adjudicate CTAP or ICTAP claims. Mark qualified or not qualified as appropriate. If the selection is set to "Not Reviewed," the referral process will treat the applicant as qualified for CTAP or ICTAP if the applicant meets the Well Qualified Score set on the Ordering Criteria page.

Locations. This table lists all duty locations advertised in the announcement. Locations the applicant selected will have a check in the first column. Click a location's check box to manually turn it on or off for the applicant.

Status/Value/Date. This table at the bottom of the page is a log of all activity affecting the applicant record. The information is read-only.

Biographic Information

As shown below, the applicant's biographic information is provided when the applicant completes the online questionnaire or the Form 1203-FX. It displays the applicant's SSN, citizenship status, name, address, phone, and email address.

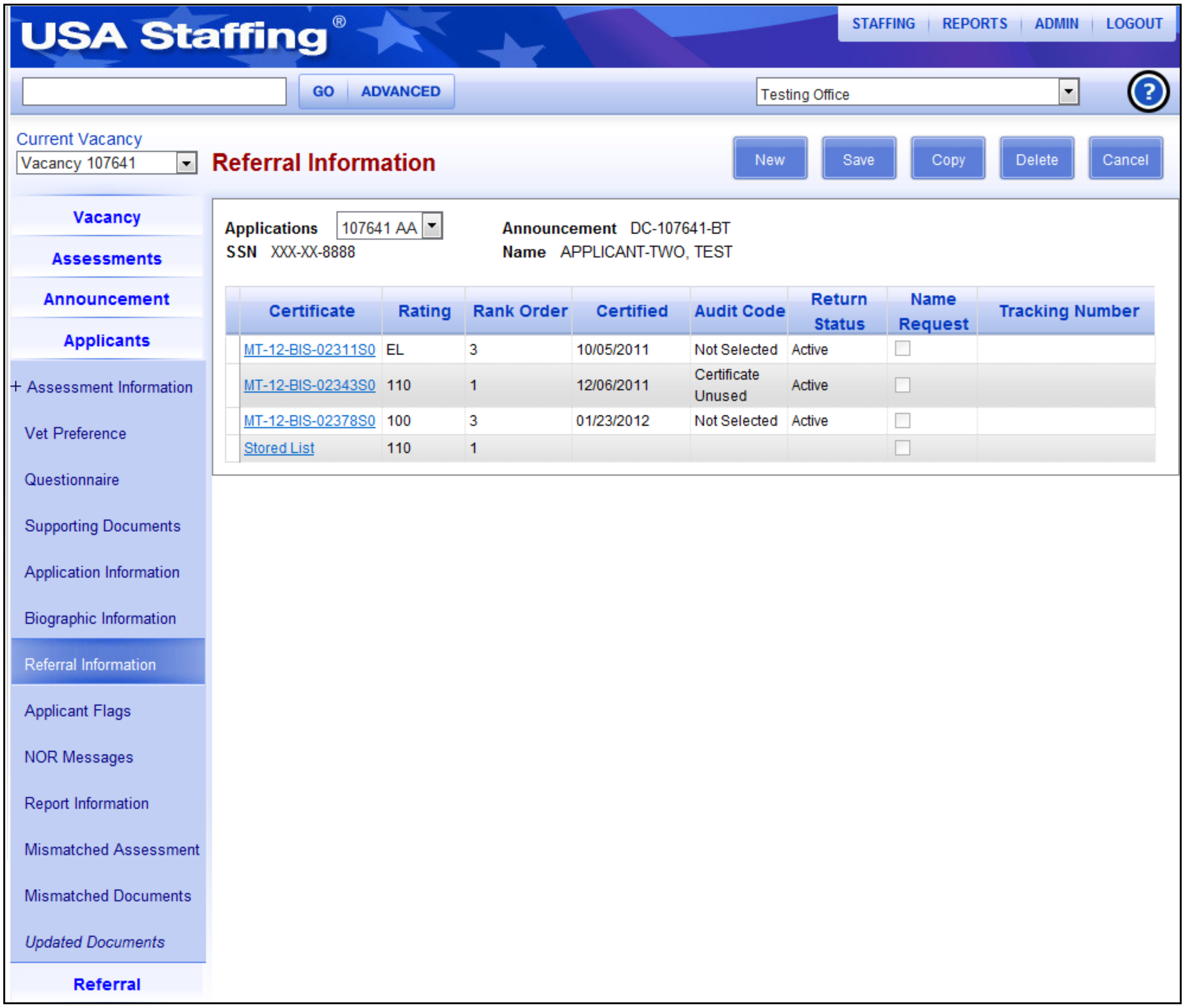


To modify the information on this page enter the new information and click the Save button. Changes made in the Biographic Info page will affect the applicant records for all applications across the organization.

SSN. This field displays the applicant's complete SSN. Changes can be made here if necessary.

Address Type. This box tells you which address is displayed on the lower part of the page. The possible choices are Home, Work, and Other. If your announcement is set up to collect both home and work addresses from the applicant, you can view or modify each of them from this page by selecting the appropriate Address Type from the drop-down.

Referral Information



The Referral Information page displays a list of all referral lists/certificates as well as stored/ranking lists an applicant is on or has been on for the VIN. The announcement number is shown at the top of the page. The picture above shows the Referral Information page for an applicant on one stored list and one certificate.

The Referral Information table includes the following fields:

- **Certificate.** Certificate numbers for which the applicant has been certified for this VIN will be displayed here. Any stored list (also known as a Ranking List) on which the applicant is listed will also appear here. Click the link to view the referral list/certificate or the stored list.

- **Rating.** This shows the rating the applicant had on the referral list/certificate or the stored list.

- **Rank Order.** This shows the ranking the applicant had on the referral list/certificate or stored list.

- **Certified.** This shows the date that the certificate was issued

- **Audit Code.** If the referral list/certificate has been audited, the audit results for the applicant are displayed here.

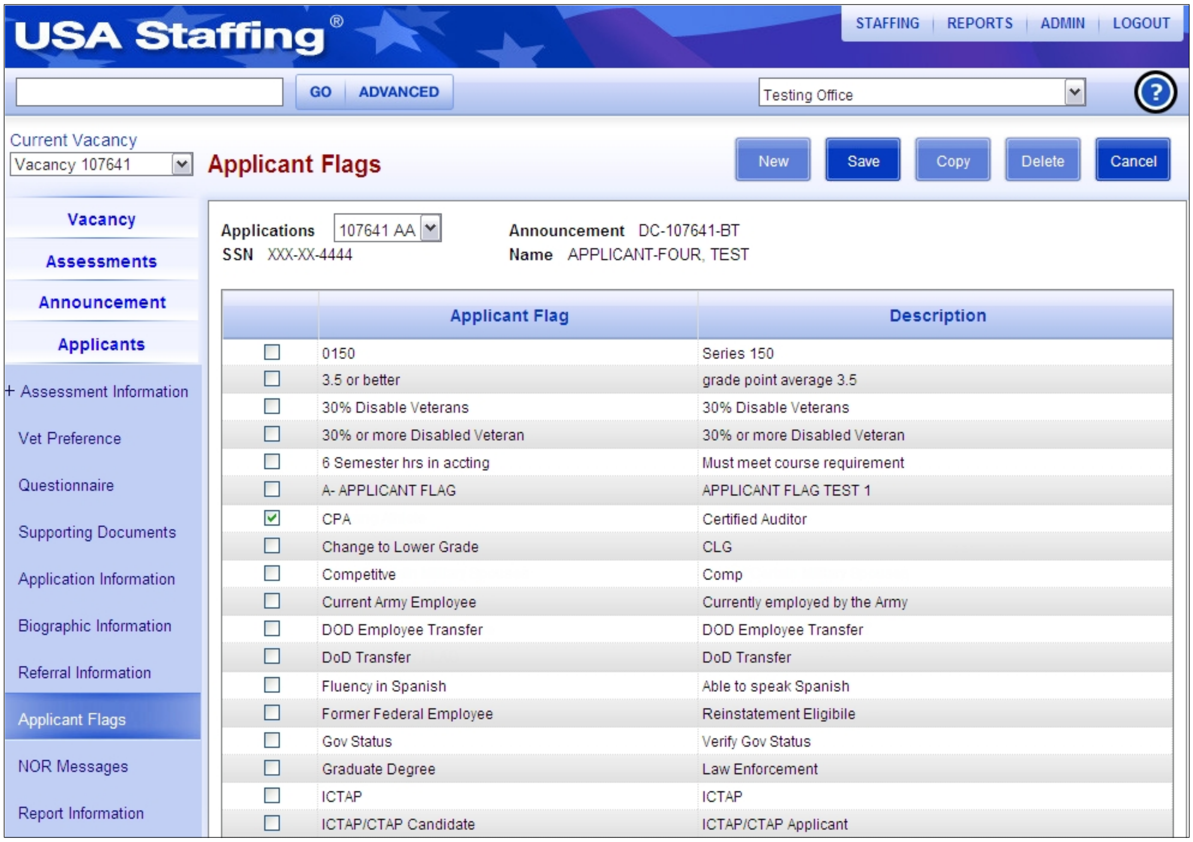
- **Return Status.** If there are audit results, the Return Status shows the status of the applicant record after the audit.

- **Name Request.** If the applicant was entered as a Name Request on the Referral > Request Information page prior to completing the Ordering Criteria page, there will be a checkmark in this box.

- **Tracking Number.** If there are audit results, this field shows the Tracking Number assigned to the selection. This information is used to track Request for Personnel Action(s) (SF-52s) within USA Staffing.

Applicant Flags

Applicant flags are annotations appearing on the certificate that typically indicate that the applicant meets certain criteria (such as fluency in a foreign language) or that some kind of review or follow-up is needed (such as coursework pending completion). This is a convenient way to inform the selecting official; for example, Outstanding Scholar, VEOA Eligible, Bilingual – Spanish, or Must Provide Transcripts.



How to Use Applicant Flags. Applicant flags can be set to automatically be assigned to an applicant record or they can be assigned manually.

Automatically Setting Applicant Flags. You can set up your questionnaire so if an applicant chooses a particular response, a flag is automatically assigned. This is done in the Assessment Questionnaire Builder page using the Item Editor.

Manually Setting Applicant Flags. You can apply an applicant flag to an applicant record by placing a checkmark next to the flag. A flag may be removed by removing the checkmark.

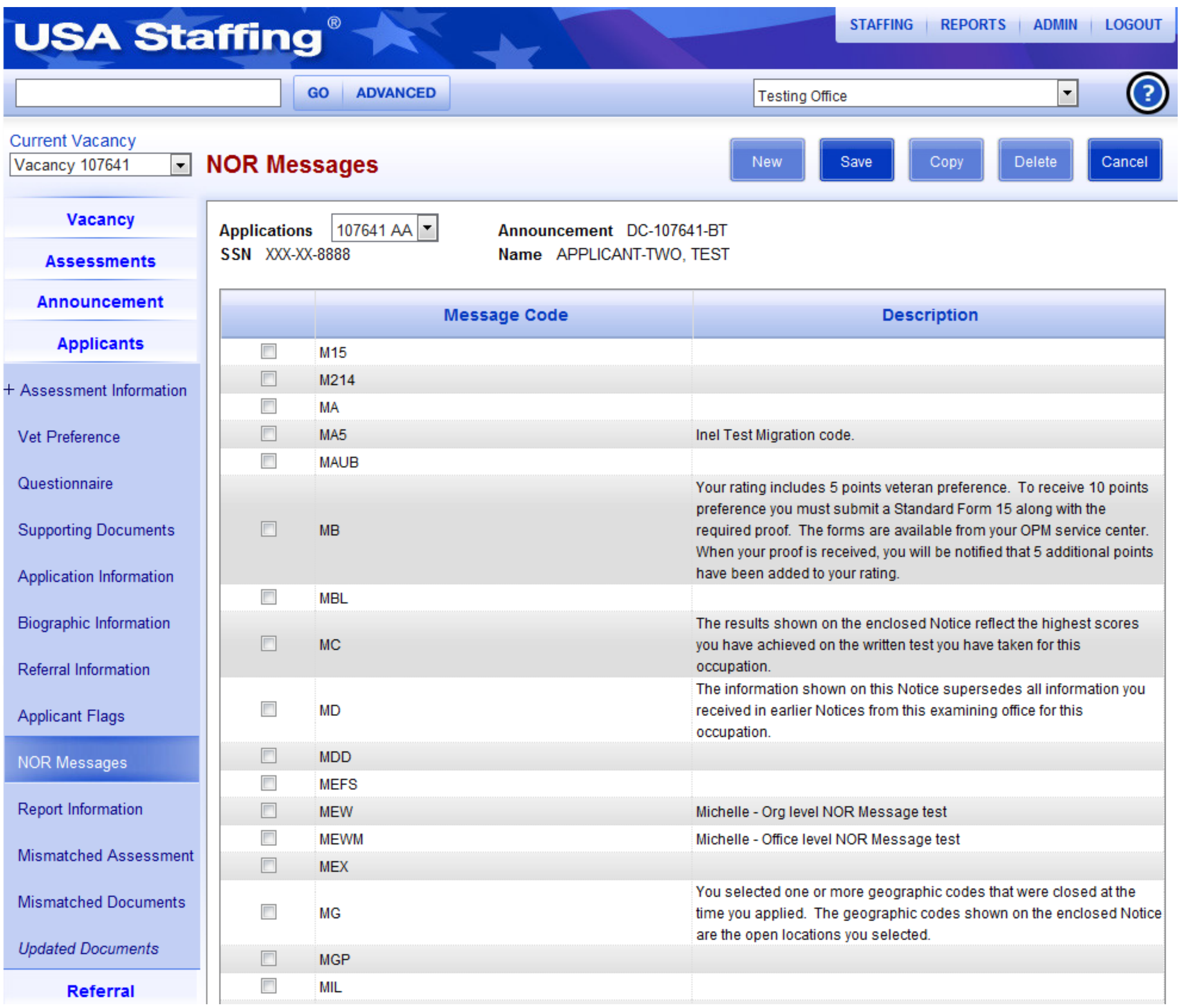
Available Applicant Flags. The applicant flags are established in the Administration area under the Preferences section. Flags can be created by users with the appropriate permission profile. For further information, refer to the Administration segment of this manual.

NOR Messages

NOR messages are a useful tool to notify applicants about special circumstances concerning their applications. NOR message codes applied to the applicant record will appear in the Notice of Results email the applicant receives.

NOR messages do the following:

- Provide specific information to the applicant about their application and/or eligibility.
- Inform applicants that a change in their record has occurred.



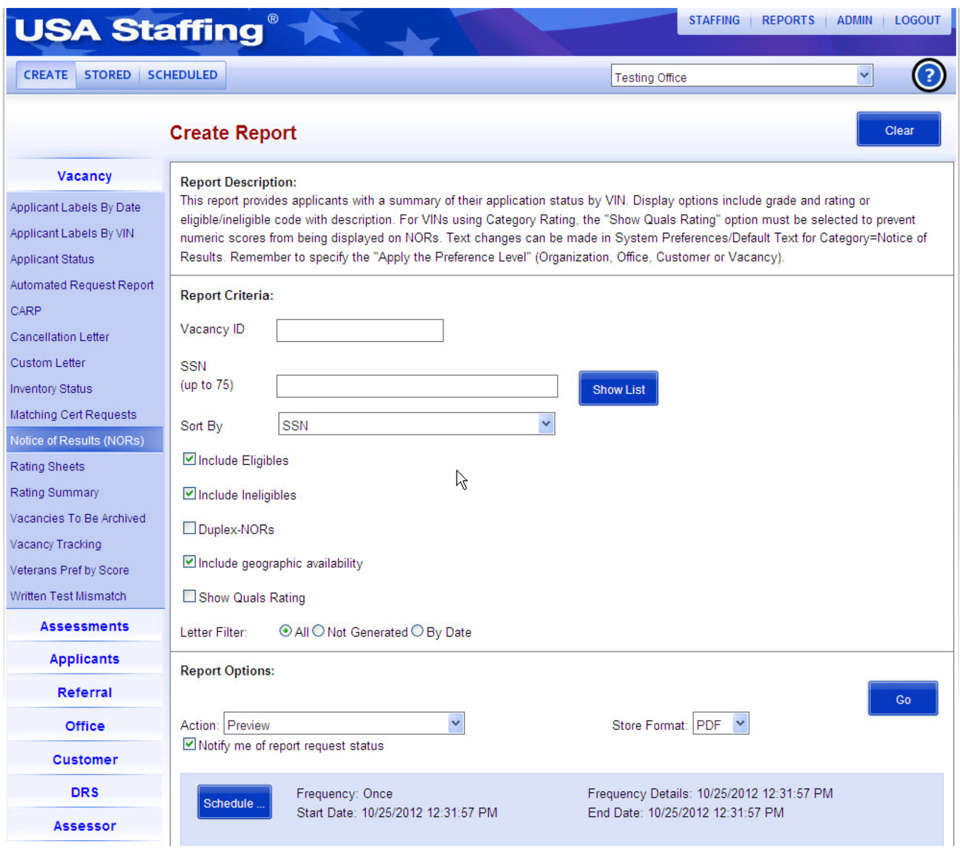
To apply a NOR message to an applicant's record, select the NOR Messages page from the left menu and place a checkmark in the box to the left of the appropriate message. The message will be inserted at the bottom of the NOR letter/email the applicant receives, under the heading Special Messages. A message may be eliminated by removing the checkmark.

USA Staffing contains several messages at the system level that are available for your use. The NOR messages are established in the Administration area under the Preferences section. Messages can be created by users with the appropriate permission profile. For further information, refer to the Administration segment of this manual. (See Appendix C for a list of NOR message codes.)

Notice of Results

The Notice of Results (NOR) letter is an excellent means to notify applicants of their status—both tentative eligibility and ineligibility. The USA Staffing Program Office recommends sending this letter to ineligible applicants upfront in the process, before certificates are issued. If ineligibles are notified with the NOR letter, you do not have to notify this group later in the process. Once the letter is sent, the applicant’s status will change on USAJOBS to reflect the ineligibility.

To run a Notice of Results report, click Reports on the top navigation bar. Click Notice of Results (NORs) under Applicants on the left menu bar. You will specify the kinds of applicant records to include in the report. Below are explanations for the report criteria.

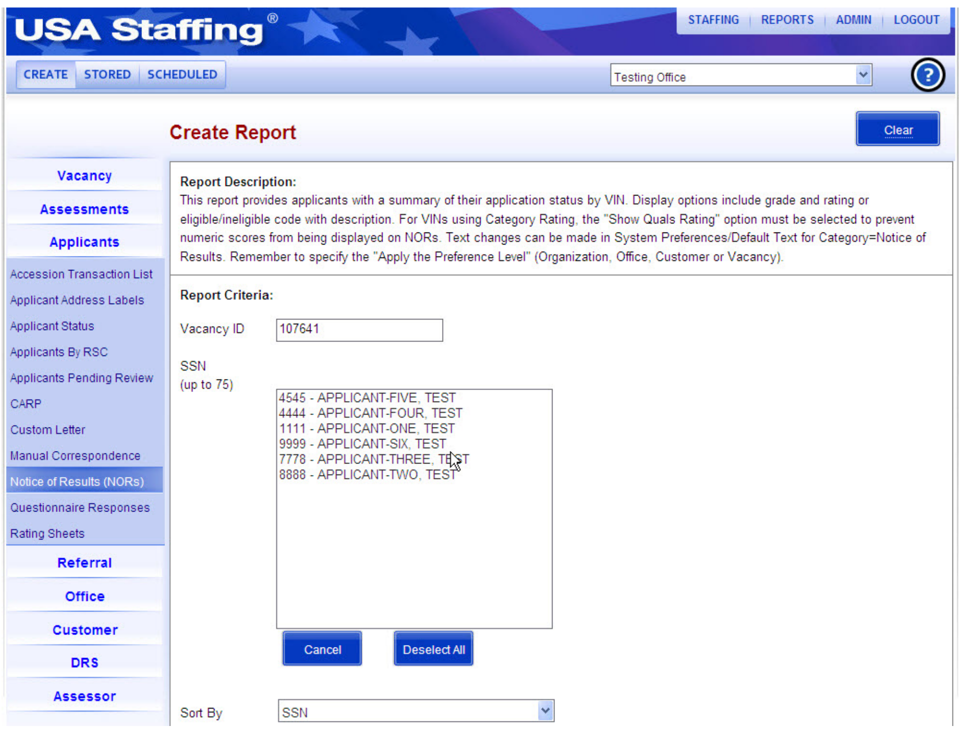


Report Criteria

Vacancy ID. Type in the VIN for which you want to generate the report.

Show List (SSN). Click this button to display a list of the applicant names with the last four digits of SSN. You may select one or more (up to 75) applicants. Click to highlight the name and hold the Ctrl button to select more than one. However, this is not required. If no SSNs are selected, the report will generate for all applicants who meet the report criteria.

Note: The Show List function should not be used unless you want to send the report to select people. You need only the VIN and Include Eligibles or Include Ineligibles, and the letter will go out to those groups of applicants, as appropriate.



Sort By. This drop-down list allows you to sort applicants in the report by Certificate Rank, Last Name or SSN. If no other selection is made, applicants will be sorted by SSN.
Deselect All. This button will clear all choices in the selection box with which it is associated.

Include Eligibles. A check in this box will add eligible applicants to the report, unless they are filtered out by Letter Filter criteria you may specify at the bottom of the page.

Include Ineligibles. A check in this box will add ineligible applicants to the report, unless they are filtered out by Letter Filter criteria you may specify at the bottom of the page.

Duplex-NORs. A check in this box means that the system will instruct the printer to print Notices of Results on both sides of a sheet of paper, with the back side containing a form that applicants can use to request changes to their records. The USA Staffing Program Office does not recommend using Duplex-NORs. Applicants can make changes to their application using Application Manager up until the closing date.

Include geographic availability. A check in this box means that the NOR will show the locations that were advertised on the job announcement and which the applicant selected in their application. Be careful with this feature! If you have many locations in your announcement, and the applicant selected many or all of these locations, they will display in a single column, expanding the size of this email considerably. Remember, your letter could always reference the applicant back to their Application Manager account to check the locations selected. The locations will display under this announcement (VIN) under the View/Print My Answers button.

Show Quals Rating. A check in this box means that the NOR will display either EL for eligible or the assigned ineligible code instead of the numeric score. The message displayed for each Ineligible code is unique. You can print out a report of your Office's codes for reference. This report is called NOR Message Codes, and can be located in the Reports area under Office on the left menu bar.

Letter Filter

All. Generate a copy for all applicants who otherwise meet the report criteria.

Not Generated. When this option is selected, the system will exclude applicants who received this report previously, regardless of the report criteria you specify.

By Date. When this option is selected, you will specify a date range—either for the date any previous copy of the report was generated or for the date the application was processed.

Generated. A copy of the report is prepared only for applicants who already had a copy generated between (and including) the dates you specify.

Processed. A copy of the report is prepared only for applicants who were processed in USA Staffing between (and including) the dates you specify.

HOT TIP! You may want to send NORs or other applicant correspondence by email. Following are tips for making the most of that option.

Report Options

Action. Select the report destination from this drop-down list.

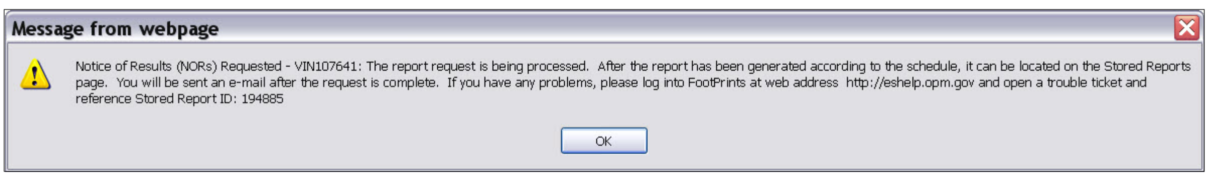
Preview. This action generates a preview of the report. We recommend you always Preview the report first so you can review the letter text before emailing it. The letters default text can be changed in Administration > Preferences > Default Text.

Send Email and Store Printable Letters. This action tell the system to send the letter to applicants who specified an email address in their application and store a printable copy of the letter for those applicants who did not provide an email address in their application. These reports will be separated into two report types, Emailed and Print, on the Stored Reports page. A copy of the Emailed letters is automatically saved in the Applicants - Report Information Page and their Application Manager account. Once sent, Emailed letters cannot be removed from Application Manager or the applicant’s record.

Store Format. The options available are PDF or HTML. This determines whether the report is generated as a PDF file for viewing or printing using Adobe or in HTML format. You must have Adobe Reader installed in order to read the reports stored in PDF format.

Notify me of report request status. A check in this box tells the system to email you when the report request is received and again once it is complete.

Go. Click this button after you have made all report criteria and report options selections, and are ready to generate the report. A confirmation message will display. Make a note of the Stored Report ID so that you can easily identify it on the Stored Reports page.



Click **OK**. Your report request is forwarded automatically to the report server.

Once the report is complete, click Stored on the top navigation bar to access the Stored Reports page and preview, print, or save the requested report.

The report server will send you an email to let you know it has received the request and it is being processed, unless you have unchecked the Notify me of report request status box.

Sample Message That Request Is Being Processed
From: usastaffingoffice@opm.gov [mailto:usastaffingoffice@opm.gov] Sent: Monday, December 12, 2011 12:28 PM To: Smith, Jill Subject: Notice of Results (NORs) Requested - VIN107641 The report request is being processed. After the report has been generated according to the schedule, it can be located on the Stored Reports page. You will be sent an e-mail after the request is complete. If you have any problems, please log into FootPrints at web address http://eshelp.opm.gov and open a trouble ticket and reference Stored Report ID: 194889 PLEASE DO NOT RESPOND TO THIS MESSAGE. IT WAS GENERATED AUTOMATICALLY.

The report server will send you a second email to let you know the report is ready to be viewed in Stored Reports, unless you have unchecked the Notify me of report request status box.

Report Information

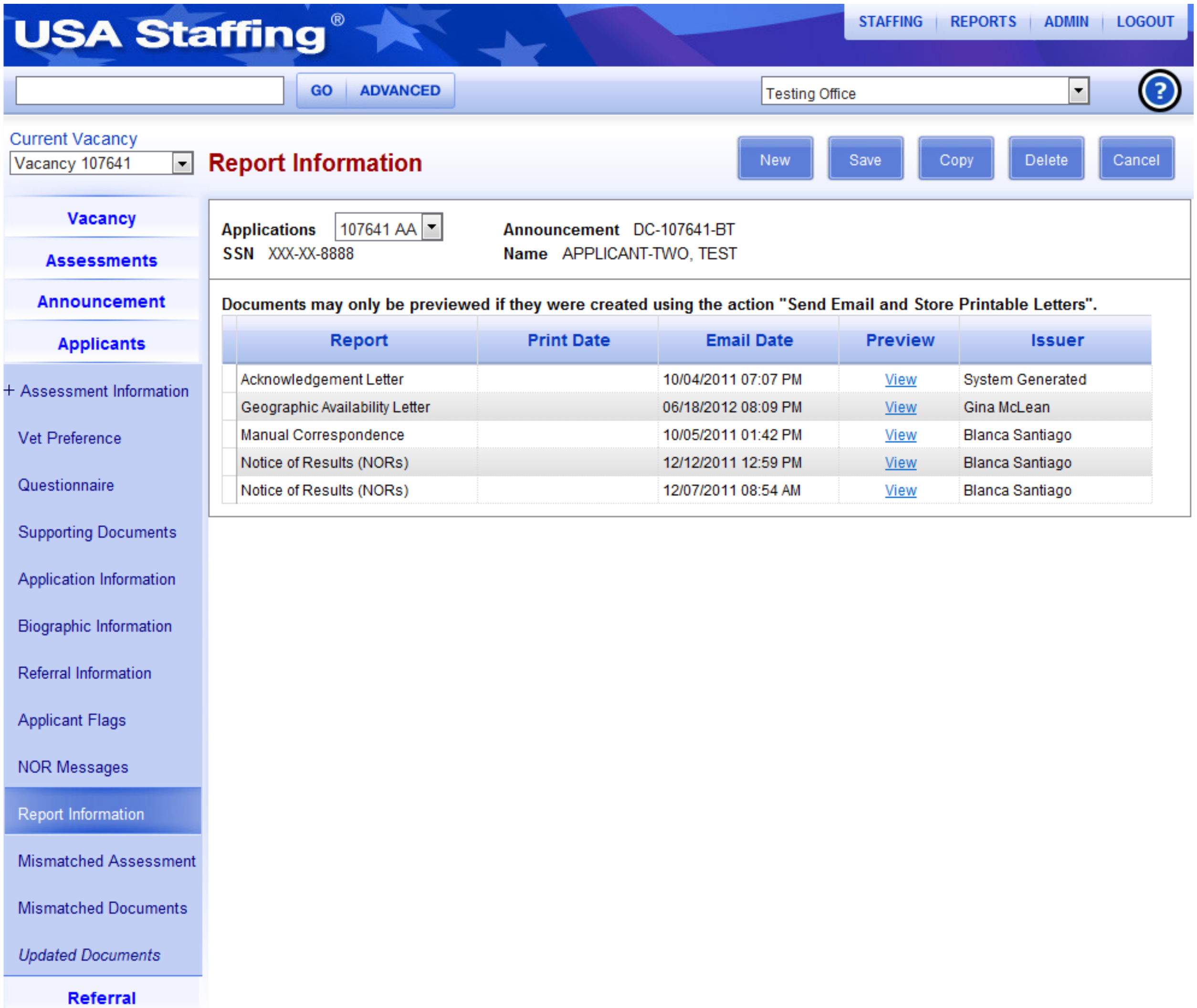
The Report Information page shows reports that have been generated for the applicant. The report type is identified in the Report column.

The Print Date column identifies the date letters were produced as a stored report. Printed stored reports are produced for applicants who did not provide an email address. The letters are sent to the applicants' Application Manager account and do not necessarily need to be mailed.

The Email Date column identifies the date emails were sent to the applicant. Emailed correspondence goes to the applicant's email address, and a copy is sent to the Application Manager account.

The Preview column allows users to view a copy of the report generated for that applicant.

The Issuer column identifies the USA Staffing user who generated the report.



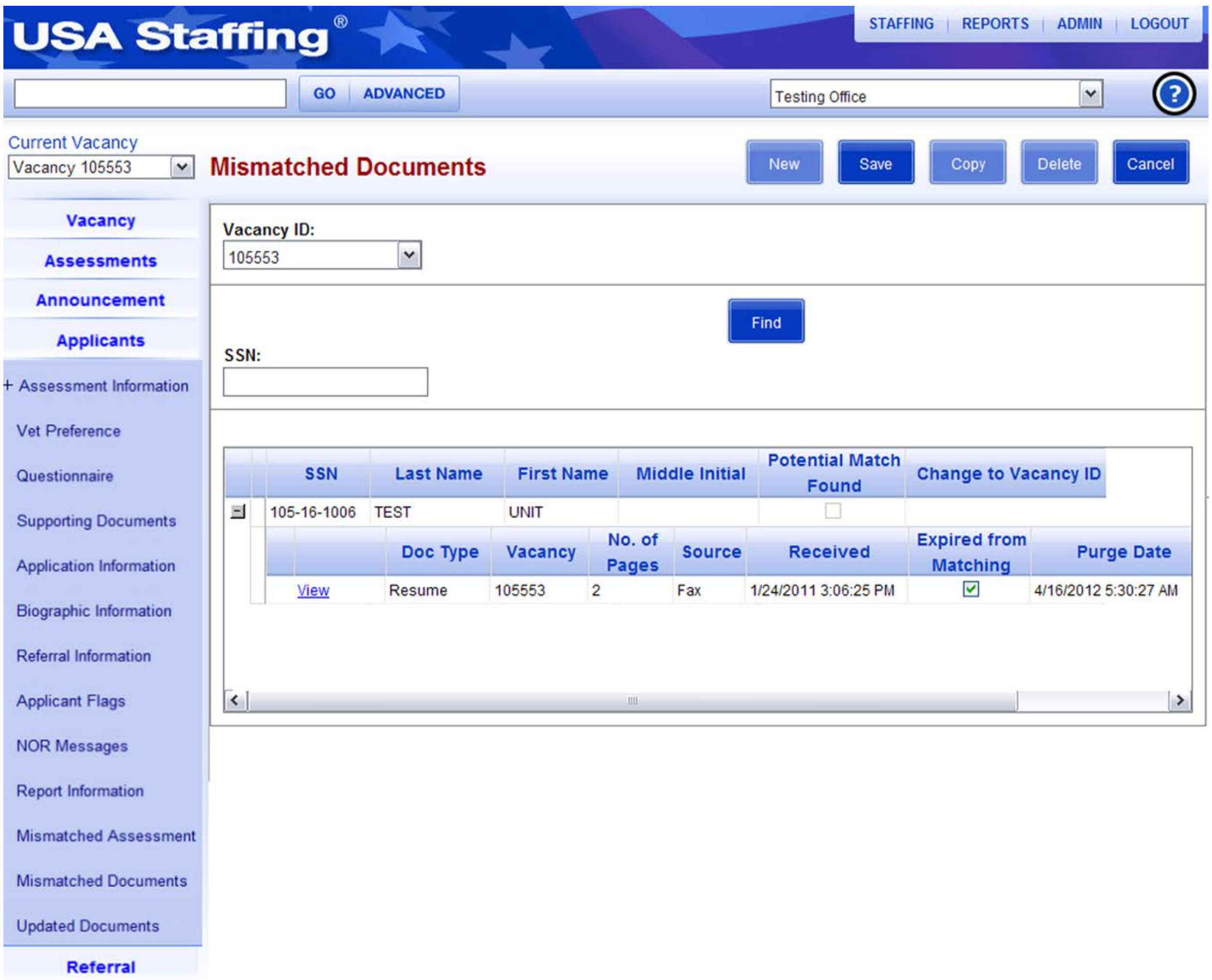
HOT TIP! Acknowledgement emails are the only system-generated notices sent to applicants. This email is triggered when the applicant's record is received by USA Staffing, immediately after selecting the Submit My Answers button in the questionnaire. Acknowledgement emails are not generated for those applicants who apply by faxing the OPM Form 1203-FX. The Acknowledgement e-mail can be turned on/off in the Administration area under Preferences/Configurations.

Mismatched Assessment

When your assessment plan includes multiple assessments, a mismatch occurs when the applicant information, SSN, and name from the assessment component differ from the record in the VIN. The Mismatched Assessment page will display applicants in mismatched status.

Mismatched Documents

USA Staffing will automatically match the applicant's faxed supporting documents to their record. Applicants with an existing record who fax supporting documents must use the Fax Cover Sheet (http://staffing.opm.gov/pdf/usascover.pdf). The Fax Cover Sheet identifies the VIN, name, and SSN of the applicant, allowing the documents to be matched to the applicant record for this vacancy.



Applicants faxing an OPM Form 1203-FX and supporting documents do not need to provide a Fax Cover Sheet. The OPM Form 1203-FX contains the information required to create a new record for the vacancy and match any supporting documents to that record.

Mismatched documents only occur when supporting documents are faxed. This mismatch occurs because there is a difference between the applicant's record in the system and the information provided on the Fax Cover Sheet. Examples include:

- Applicant applies as JOHN W. SMITH and faxes supporting documents under the name JOHNNY SMITH.

- Fax processing will not occur even though JOHN and JOHNNY are the same person and have the same SSN.

Conversely, the error may reside in the applicant's record or SSN. JOHN W. SMITH could have entered the last four digits of his SSN as 3456 and the Fax Cover Sheet shows 3455; therefore, the documents will not be matched to the record. At this point, the user would see the mismatched documents and need to make corrections to either the existing record or the information provided on the Mismatched Documents page, i.e., the SSN or Name field.

Mismatched documents also occur because there is no applicant record in the VIN to match against the documents. This happens when an applicant faxes supporting documents and does not complete the questionnaire. When this occurs, it is recommended that a USA Staffing user not create a record for these applicants. Remember, the applicant has not completed the requirements of the application process by submitting the questionnaire and the supporting documents. Applicants have the option to check their status prior to the closing date, through their USAJOBS account.

The document match process works by matching the applicant's record information, VIN, name, and SSN to the information contained on the Fax Cover Sheet.

Here are the options on this page:

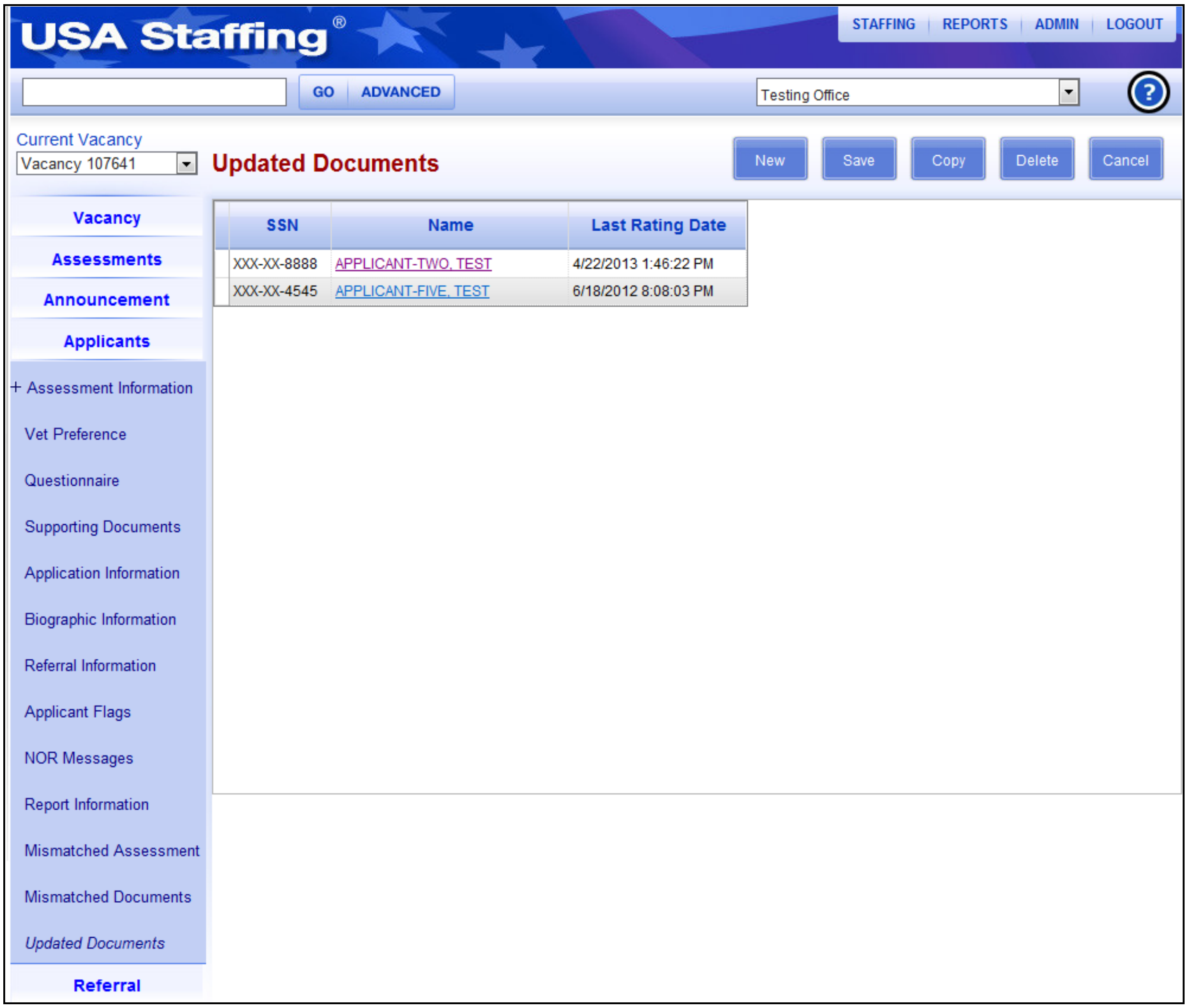
- Changing SSN or Name. To change the SSN or name on the mismatched document table, double-click the cell with the incorrect information, type the correct information, and click the Save button.

- Finding an Applicant. When you have a long list of mismatched documents, you can quickly locate a particular applicant by typing in the SSN and clicking the Find button.

  Note: You can produce a printed list of applicants with mismatched documents. The Mismatched Documents summary is available in the Reports area under the DRS button. Use this when you have many applicants in the Mismatched page.

Updated Documents

The Updated Documents page is a list of applicants who submitted documents after the closing date for case exam announcements or four or more hours after the last rating for standing registers. When this occurs in a case exam announcement a warning message will appear on the Stored List page indicating that there are updated documents to be reviewed.



When clicking the applicant's name on the Updated Documents page, the Supporting Documents page for that applicant opens. The document must be marked as reviewed in order to be removed from the Updated Documents page.

New Applicant Records

There are certain circumstances that may require you to enter applicant information, such as when you receive forms that have been mailed or emailed to your office.

For training purposes, you will enter applicant records into your VIN. These records will then be used in the Referral area and to send notifications.

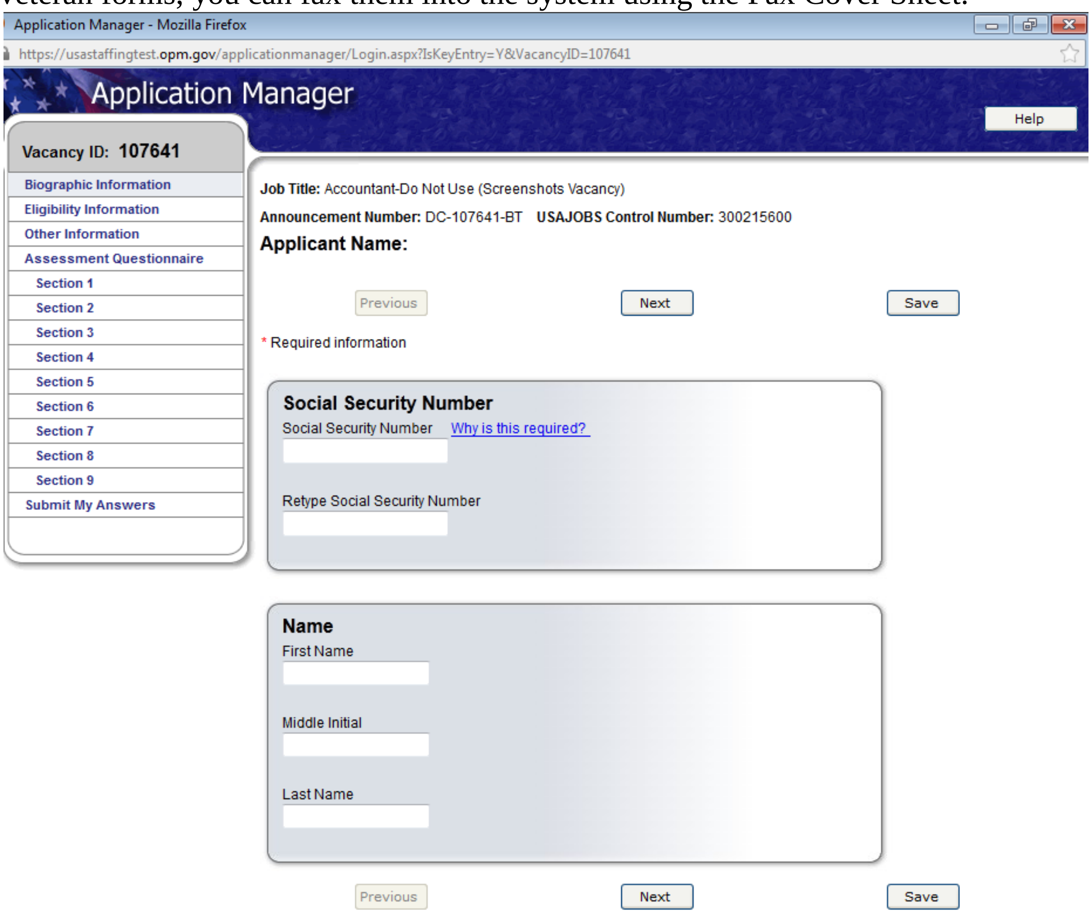
Click the Applicant button on the left menu.

Click the New button on the Applications page or the main applicant page to create the applicant record. This will display the first page of Application Manager. This display is the same as what an applicant would see when applying online.

Note: Be sure to enter your email address on one of the applicant records. This will enable you to receive system generated emails or applicant correspondence later in the training process.

Enter the appropriate information in the fields. Click the Next button to move through the pages and click the Submit My Answers button to complete the application.

If you have hard copies of the applicant's supporting documents, such as a resume, transcript, or veteran forms, you can fax them into the system using the Fax Cover Sheet.



Check Your Skills – Create New Applicant Records

Take 30 minutes to create and enter applicant records for your VIN. (Make sure your VIN is currently open.

1. Click the Applicant button.
2. Click the New button.
3. Enter the SSN and name of the applicant. For the SSN use the following convention: the 6-digit VIN + 001, 002, 003, etc.
4. Click the Next button.
5. Enter the biographic and citizenship information for your applicant.
6. Click the Next button and enter the Eligibility information, such as Veteran's Preference.
7. Click the Next button to enter other information.
8. Click the Next button and respond to the occupation-related questions. Make sure you have at least three qualified applicants.
9. Click the Next button.
10. Click the Submit My Answers button (notice the confirmation message).
11. Close the window by clicking on the X at the top right.
12. Click the Applicant button in USA Staffing, and your main Application screen will now show your applicant.
13. Create four more applicant records following the steps above.

Check Your Skills – Search for an Existing Applicant Record

Take 5 minutes to practice searching for an existing applicant record.

Search for one or more of the applicant records you created in the previous exercise. Search using one of these options:

- Last name
- First name
- SSN
- VIN
- Announcement number
- Record status

Check Your Skills – Create a NOR Report

Take 10 minutes to work individually to create and view/print a NOR.

Create a NOR report for one of your completed VINs (you have applicants) by doing the following:

1. Click Reports the top navigation bar.
2. Click the Notice of Results (NOR) button under the Applicants option on the left menu bar.
3. On the Create Report page, enter the VIN.
4. Check the following boxes:
   - Include Eligibles
   - Include Ineligibles
   - Duplex-NORs
   - Include geographic availability
   - Show Quals Rating
5. InIn the Filter box, make sure the radio button for All is selected. Note that although All is selected by default, you can select any of the options (All, Not Generated, or By Date) by clicking the radio button next to that selection.
6. On the Report Options section, select Preview from the Action drop-down list to generate a preview of the report.
7. Select PDF as the Store Format.
8. Check the Notify me of report request status box to have the system email you when the report request is received and again once it is complete.
9. Click Go after you have made all report criteria and report options selections, and are ready to generate the report. A confirmation message will display. Make a note of the Stored Report ID so that you can easily identify it on the Stored Reports page.
10. Click OK. Your report request is forwarded automatically to the report server.
11. Once the report is complete, click Stored on the top navigation bar to access the Stored Reports page. The screen will refresh to show all the stored reports. You can identify your report through your user name or your VIN.

Check Your Skills – Email a Notice of Results

Take 15 minutes to work individually on practicing emailing a Notice of Results (NOR).

Email the NOR for one of your vacancies by doing the following:

1. Click Reports at the top navigation bar.

2. On the left menu bar, click the Vacancy button and then select Notice of Results (NORs) report.

3. Enter the same VIN you used in the previous exercise.

4. Click the Show List button to the right of SSN (75). A list of applicants, with their SSNs, will be displayed in the selection window.

5. Select the applicants (up to 75 names) to whom you want to email the NOR by doing one of the following:

   - To select only one applicant, click the applicant's name and click the Select button under the selection window. The selected applicant's SSN will show up in the SSN window.

   - To select two or more applicants, do one of the following:

     - To select a number of applicants listed in sequence, click the first name you want, press down on the Shift key, and click the last name you want. Then click the Select button under the selection window. This will put the first name, the last name, and all the names in between in the SSN window.

     - To select two or more applicants not listed in sequence, click the first name, press down on the Ctrl key, and click the next name and so on until you finish selecting all the applicants to whom you want to send a NOR. Then click the Select button under the selection window. This will put all the names you have selected in the SSN window.

6. Select the Sort By option by clicking either Last Name or SSN.

Note: Steps 4 thru 6 are not necessary when you want to send NORs to all eligible or ineligible applicants. If you do not want to select individuals, simply enter the VIN and proceed to Step 7.

7. Check the following boxes:

   - Include Eligibles

   - Include Ineligibles

- Duplex-NORs
- Include geographic availability
- Show Quals Rating

8. Select your Letter Filter option by clicking the radio button to the left of your desired option.

9. On the Report Options section, select Send Email and Store Printable Letters from the Action drop-down list to have the system send the letter to applicants who specified an email address in their application and store a printable copy of the letter for those applicants who did not provide an email address in their application.

Note: A copy of the emailed letters is automatically saved in the Applicants > Report Information Page and their Application Manager account. Once sent, emailed letters cannot be removed from Application Manager or the applicant's record.

10. Select PDF as the Store Format.

11. Check the Notify me of report request status box to have the system email you when the report request is received and again once it is complete.

12. Click Go after you have made all report criteria and report options selections, and are ready to generate the report. A confirmation message will display. Make a note of the Stored Report ID so that you can easily identify it on the Stored Reports page.

13. Click OK. Your report request is forwarded automatically to the report server.

14. Once the report is complete, click Stored on the top navigation bar to access the Stored Reports page. The screen will refresh to show all the stored reports. You can identify your report through your user name or your VIN.

Check Your Skills – Print the Rating Summary Report

Take 10 minutes to work individually practicing printing a report on USA Staffing.

Print the Rating Summary report by doing the following:

1. Click Reports on the top navigation bar.
2. Select the Rating Summary report under the Vacancy button on the left menu bar.
3. Enter the Vacancy ID Number.
4. Select the RSC (Record Status Code).
5. Select Letter Filter. Note that although All is selected by default, you can select any of the options (All, Not Generated, or By Date) by clicking the radio button next to that selection.
6. Select one of the Sort By options: Last Name or SSN. Keep in mind the applicants are listed alphabetically (last name order) in the Applicant module.
7. On the Report Options section, select Store from the Action drop-down list. This is the only option available for non-letter reports.
8. Select PDF as the Store Format.
9. Check the Notify me of report request status box to have the system email you when the report request is received and again once it is complete.
10. Click Go after you have made all report criteria and report options selections, and are ready to generate the report. A confirmation message will display. Make a note of the Stored Report ID so that you can easily identify it on the Stored Reports list.
11. Click OK. Your report request is forwarded automatically to the report server.
12. Once the report is complete, click Stored on the top navigation bar to access the Stored Reports page and preview, print, or save the requested report.

Referral

- Request Information
- Ordering Criteria
- Advanced Criteria
- Stored List
- Certificate
- Supplemental Certificates
- Selection Manager
- Amending a Referral List/Certificate
- Audit

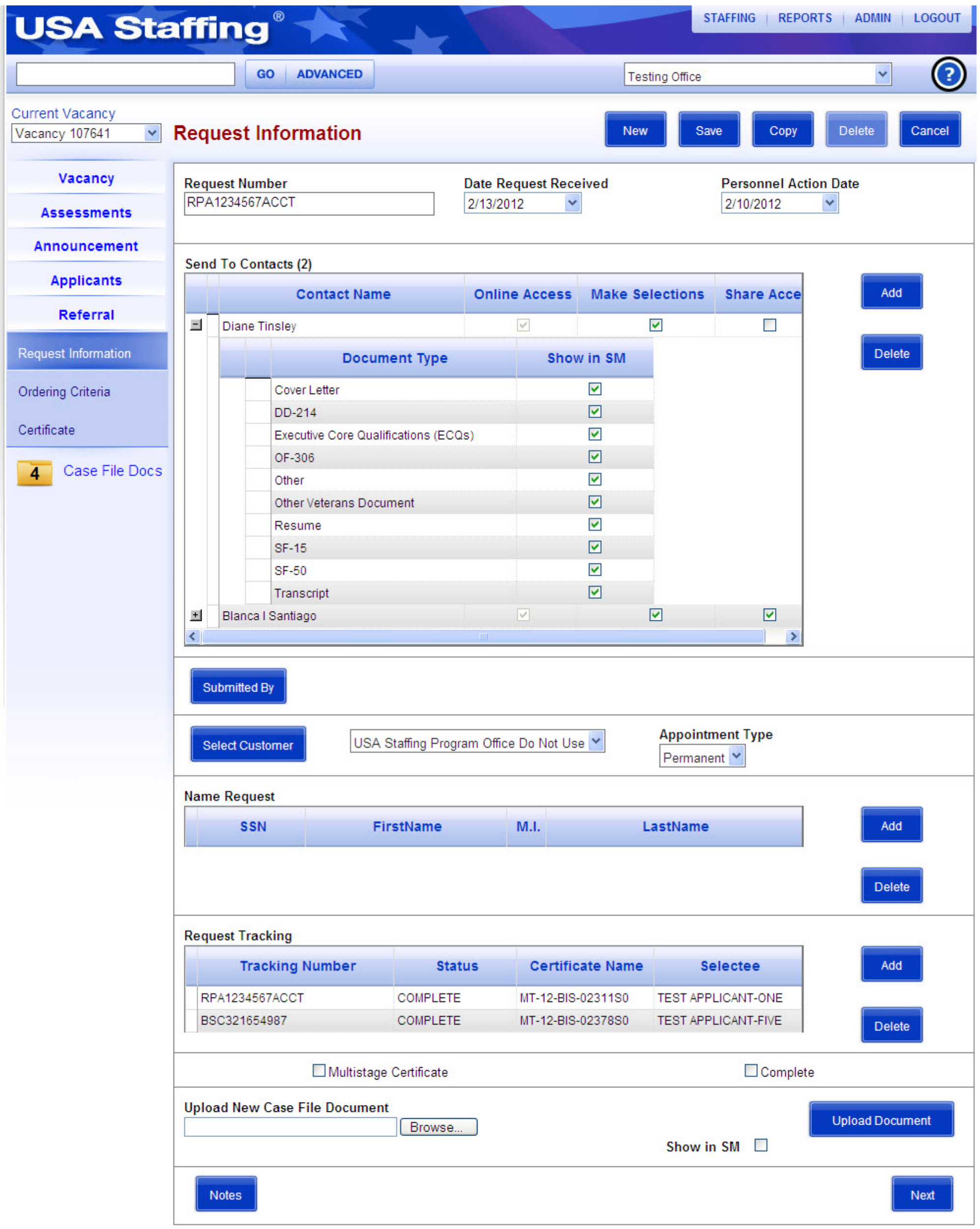
The Referral pages give you a way to create, issue, and transmit the referral list/certificate.

Request Information

The Request Information page is where you begin the referral process. All requests and subsequent referral/certificate lists are part of this vacancy.

Here are the steps you take on this page:

- Enter the Request Number. This field is required. This number is assigned to the SF-39 or SF-52 by the customer or personnel office. To make this field useful in searches, enter the information accurately.
- Enter the Date Request Received and Personnel Action Date. You can type in the dates or click the box and select the date from the calendar. The Date Request Received is required.
- Click the Save button.
- Click the Add button next to the Send To Contacts table; the Advanced Search page will appear. Type in the last name of the person receiving the certificate. If more than one record is found, select the Open link next to the contact's name to add them to this request. Repeat for each person you want to add. Remember, these individuals are listed as contacts under this customer. They must be assigned to this customer or they will not appear when you search for them.



- The Send To Contacts table may contain multiple names. Each name must have an email address and Selection Manager access assigned in the contact's record. These individuals can receive certificates electronically.

- The following access options are available for each contact listed:

    - Online Access. This box is automatically grayed out. If this box is checked, the contact was granted access to Selection Manager in their profile. If this box is unchecked, the contact was not granted access to Selection Manager. Access to Selection Manager is established by checking the Allow Selection Manager Access? box on the Contact Edit page.

  - Make Selections. Select this box to allow the contact to make selection decisions from all certificates issued under this request.

  - Share Access. Select this box to allow the contact to share access to all certificates issued under this request with other contacts.

  - Document Type. This box displays the various document types available within the USA Staffing system.

  - Show in SM. Select this box next to the document types that the Selection Manager will be able to view.

- The Submitted By button allows you to enter a contact name associated with the request.

- If there are any Name Requests, click the Add button, and a new row will be added to the Name Request table. Click the SSN cell and enter the full SSN of the individual. Click the Save button. The name will pre-populate provided they have an applicant record in the VIN. For any additional name requests, repeat this step.

- To add a tracking number to a request, click the Add button on the Request Tracking section, and a new row will be added to the table. Select the tracking number from the drop-down list, and click the Save button. For any additional tracking numbers, repeat these steps. The Status field will update according to the vacancy status.

- The Multistage Certificate box is only used with a multiple-hurdle assessment approach. Do not check this unless your assessment process involves multiple hurdles, i.e., an applicant questionnaire and written test or structured interview, etc.

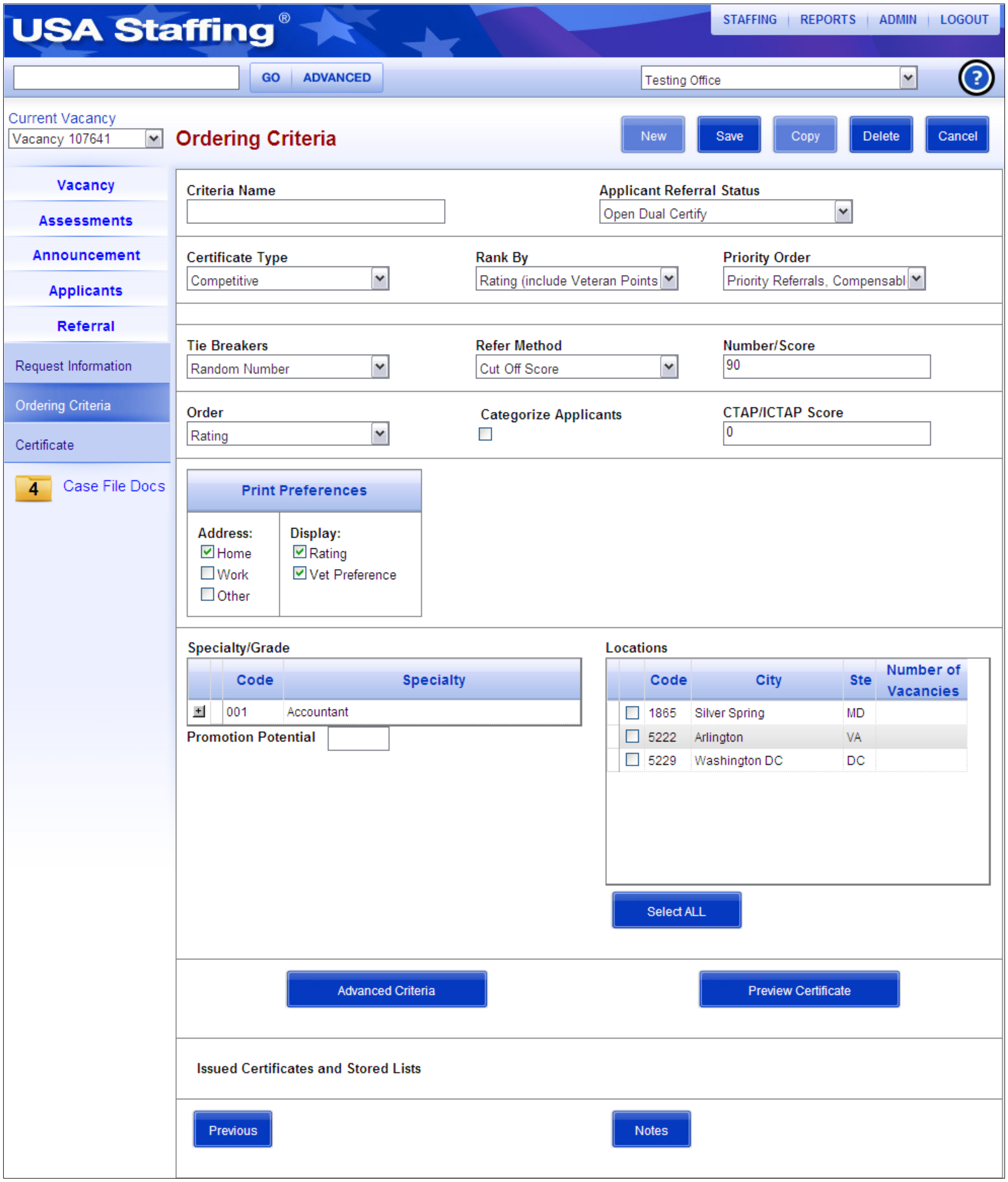
- The Complete box should be checked when no further action will be taken or required on a request.

HOT TIP! The Upload New Case File Document section allows you to upload case file documents for a referral request; for example, a Request for Personnel Action (SF-52). Documents uploaded here are listed in the Vacancy > Case File Documents page and will undergo a virus scan.

- Click the Next button at the bottom of the page.

Ordering Criteria

On the Ordering Criteria page, you will specify how the referral/certificate list will be ordered. You will make these decisions based on the certificate type and the rules that govern it. The ordering criteria can be set up, saved, and manipulated prior to issuing a certificate. Once the certificate is issued, the Ordering Criteria page will not allow further changes. There are several options on this page.



Criteria Name. Type the Ordering Criteria name in this box to identify the saved record. Give each list a unique name, e.g., Certificate Type/Grade/Location. This naming convention is very useful when issuing multiple certificates. If the criteria name is NOT entered and the page is saved, the system will automatically name the list "Criteria Name." Once the Criteria Name is saved, this field will become a read-only drop-down list.

Criteria Drop-down. This drop-down retains all ordering criterion previously established under this request number. If you are retrieving an existing Ordering Criteria record, select it from the drop-down list.

Applicant Referral Status. This allows you to include or restrict certain applicants for certification based on their Record Status Code. The table (below) shows the Record Status Code options. Following the table, the codes appearing on each type of certificate are listed.

RECORD STATUS CODES	
Code	**Meaning**
AA	Eligible for Certificate, and not currently on any certificate/referral list
AC	Currently on a Career or Career Conditional Certificate
HA	Hired from a Temporary/Term Certificate, but still active
HC	Hired from a Temporary/Term Certificate, and currently on a Career/Career Conditional Certificate
TA	Currently on a Temporary or Term Certificate
TC	Currently on both Temporary or Term Certificate and also a Career/Career Conditional Certificate

- **Active Applicants Only.** The system will only include applicants whose Record Status Code is AA (not currently on any referral).
- **Active on Temp/Term Certificates.** The system will include only applicants with the following Record Status Codes:
  - AA
  - HA
  - TA
- **Open Dual Certify.** All qualified applicants. Select this option if referring names without regard to previous certification. The system will include applicants with the following Record Status Codes:
  - AA

- HA
- TA
- AC
- HC
- TC

Certificate Type. Select the appropriate type of certificate. Certificate types correspond to the area of consideration chosen on the Vacancy/Position Information page, i.e., Competitive, Merit Promotion, or Internal Merit Promotion. The Certificate Type determines the choices that will appear in the Rank By and Priority Order boxes. The Certificate Types are as follows:

- **Competitive.** This option is used for Competitive referrals, i.e., Delegated Examining Unit (DEU). This type of certificate is sometimes referred to as "outside hiring" or "all sources."

- **Competitive Merit Promotion.** This option is used for Merit Promotion certificates. It provides a referral list of people eligible for a promotion action covered by the Merit Promotion Plan.

- **Merit Referral List.** This option is used for non-competitive referral. It provides a non-rated referral list of people eligible for appointment under the agency's Merit Promotion Plan. Typically, these non-competitive referral lists contain applicants who are eligible for lateral reassignment, transfer, or reinstatement without promotion potential.

- **Non-Traditional.** This option is used to create a list based on any of the ordering criteria choices, regardless of the area of consideration chosen on the Position Information page. It is suitable for use with some Special Hiring Authorities or Flexibilities, such as FCIP, Excepted Service positions, Schedule A, and Title 38.

- **Category Rating.** This option is used to create a list using Category Rating procedures. This certificate type automatically sets the ordering criteria following category rating rules.

  Note: Certificate Types allow you to order applicants under the appropriate certificate type. To ensure the correct applicants are on each of these certificate types the questionnaire and/or assessment must capture the requisite information needed to sort these applicants appropriately. Typically, additional questions and/or occupational specialties are used to help you accomplish this sorting.

HOT TIP! With greater freedom comes greater risk and responsibility. Because Non-Traditional turns off all rules and restrictions that normally apply when preparing a referral list, you must be very careful to ensure that ordering criteria used are valid and appropriate under the circumstances.

Rank By. This drop-down list determines how the applicants will be ranked on the referral list/certificate. If the certificate is other than Competitive, you can choose the Rank By options from the drop-down list. The choices available depend on the rules that govern the Certificate Type selected. The options vary by certificate type and are as follows:

- **Rating (include Veterans Preference).** Applicants are ordered by score and Veterans Preference rules. This option is the default when you select Competitive (DEU type) as your certificate type.

- **Rating (exclude Veterans Preference).** This can be applied to Merit Promotion, Category Rating, and Non-Traditional certificate types. Applicants are ordered by score excluding Veterans Preference rules.

- **Raw Score.** This can be applied to Competitive Merit Promotion and Non-Traditional certificate types. Raw score is the applicant's score prior to transmutation table conversion.

- **Eligibles Only.** Numeric ratings will not appear. The list will show applicants as "Eligible" and will not show any Veteran's Preference to which they may be entitled. Typically applied with Competitive Merit Promotion and Non-Traditional certificate types.

Priority Order. Choose the Priority Order from the drop-down list.

- **Priority Referrals, Compensable Veterans.** Priority referrals will order CTAP/ICTAP qualified candidates at the top of the list under a Priority heading, followed by compensable veterans (if any), then the remaining applicants in score order with Veterans Preference rules applied following the ordering criteria for this certificate.

- **Compensable Veterans Only.** This will place all compensable veterans at the top of the list before any remaining applicants following the ordering criteria for this certificate.

- **Priority Referrals Only.** This will place all priority referral candidates at the top of the list before applying the ordering criteria for this certificate to the remaining applicants.

- **Absolute Veteran Preference.** This will place all veterans at the top of the certificate in Veterans Preference order followed by non-veterans meeting the ordering criteria.

- **Normal Floating Rules.** This option applies to the Category Rating certificate type only. It will place priority referral candidates and veterans on the certificate based on normal category rating floating rules provided they meet the CTAP/ITCAP well qualified score or category cut-off score.

- **GS-09+ Prof & Scientific.** This option applies to the Category Rating certificate type only. It <u>must</u> be selected when creating certificates for Professional and Scientific positions at the GS-9 grade or above where CP/CPS veterans do not float to the top category.

- **None.** No priority order applied.

Tie Breaker. This defaults to Random Number.

- **Random Number.** This option applies to the last digit(s) of the SSN. The random number is a system-generated number that serves as the tie breaker for ordering purposes when two or more applicants have the same rating. This number changes from day to day and cannot be manually changed.

- **Service Computation Date.** The Service Computation Date, entered by the applicant, is used as a tie breaker.

- **Other Dates 1, 2, and 3.** These are searchable date fields which can be used as tie breakers. Applicants are asked to submit these dates during the application process, and they are specific to the job announcement.

- **None.** No tie breaker applied.

  Note: Service Computation Date and Other Dates require that the applicant questionnaire collect this information when applicants apply. If the information is not collected properly, it cannot be used as part of the ordering criteria. These tie-breaking options are only available for the Competitive Merit Promotion and Non-Traditional certificate types.

Refer Method. The selection made here controls how the system establishes the names for the referral list/certificate.

- **Number of Names.** This selection corresponds to the adjacent Number/Score field and will determine how many applicants will be included on the certificate.

- **Cut Off Score.** This selection corresponds to the adjacent Number/Score field and will determine that a cut-off score will be used to determine which applicants will be included on the certificate.

- **Selected Applicant Flags.** This selection will enable the Applicant Flags display on this page where users can indicate which flag(s) will be used to determine which applicants will be included on the certificate.

Number/Score. When you choose the Number of Names or Cut Off Score refer methods, enter the number of names to be referred or the cut-off score in the Number/Score box.

Category Cut Off. The Refer Method field automatically changes to Category Cut Off for the Category Rating certificate type. The categories listed in this field are based on the Vacancy Categories. The system will automatically use the top category (e.g., Best Qualified) to create the Stored List/Certificate. We recommend this default setting not be changed.

Cut Off Score. The Number/Score field automatically changes to Cut Off Score for the Category Rating certificate type. The score displayed is based on the cut-off rating of the Category Cut Off name selected (e.g., Best Qualified = 90).

Note: When the Rank By is set to Eligibles Only, do not use a cut-off score. Also, be careful when Rank By is set to Raw Score. The Raw Score is typically not between 70 and 100. Raw Scores can vary, depending on the assessment, from scores as low as 4 to as much as 300+ points.

Order. This controls the order in which the names appear. The choices are:

- **Rating.** This choice puts the names in order by their ratings. This choice is mandatory if the certificate type is Competitive (DEU type).
- **Name.** Names are listed alphabetically by last name, secondarily by first name and middle initial.
- **SSN.** Names are listed in SSN order. SSN will be masked and only display the last four digits on the certificate.
- **Service Computation Date.** Names are listed according to the service computation date entered by the applicant.
- **Other Dates 1, 2, and 3.** Names are listed according to the Other Date entered by the applicant.

Categorize Applicants. Categories must be set up in the Vacancy area prior to posting the announcement. This option defaults to checked for the Category Rating Certificate Type. This option is not available for other certificate types.

Refer Veterans Only. This option is only available for the Category Rating certificate type. Checking this box prompts the system to create a stored list containing only applicants with claimed or adjudicated veterans' preference. Applicants who are adjudicated as NV- No Preference will not be included in the stored list. Please note that even if the Refer Veterans Only box is checked, the system will still properly refer all priority consideration applicants (e.g., CTAP/ICTAP) who meet or exceed the user-specified CTAP/ICTAP cut-off value regardless of their veterans' preference status.

CTAP/ICTAP Score. Enter the score applicants must attain in order to be considered well qualified under CTAP/ICTAP procedures. This qualifying score does not include Veterans Preference points. Note that applicants who claimed CTAP or ICTAP eligibility will be referred as Priority Referrals as if they are well qualified. Verify and adjudicate the claim on the Application Information page prior to issuing certificates.

Print Preferences. Check the appropriate boxes to include this information on the referral list/certificate. The preferences include the following:

- Home Address
- Work Address

- Other Address
- Rating
- Veterans Preference

Specialty/Grade. Click the plus sign next to the specialty. The available specialty and grades will display in the table. Click the radio button next to the appropriate specialty/grade level. You may select only one. These specialty/grade level options are based on the assessment attached to this VIN.

Locations. Place a check in the box next to the location to be included on the referral list/certificate. You may select more than one location or all locations as appropriate.

Promotion Potential. Enter the position's promotion potential in this field if applicable. The promotion potential entered here will appear on the certificate and some applicant correspondence.

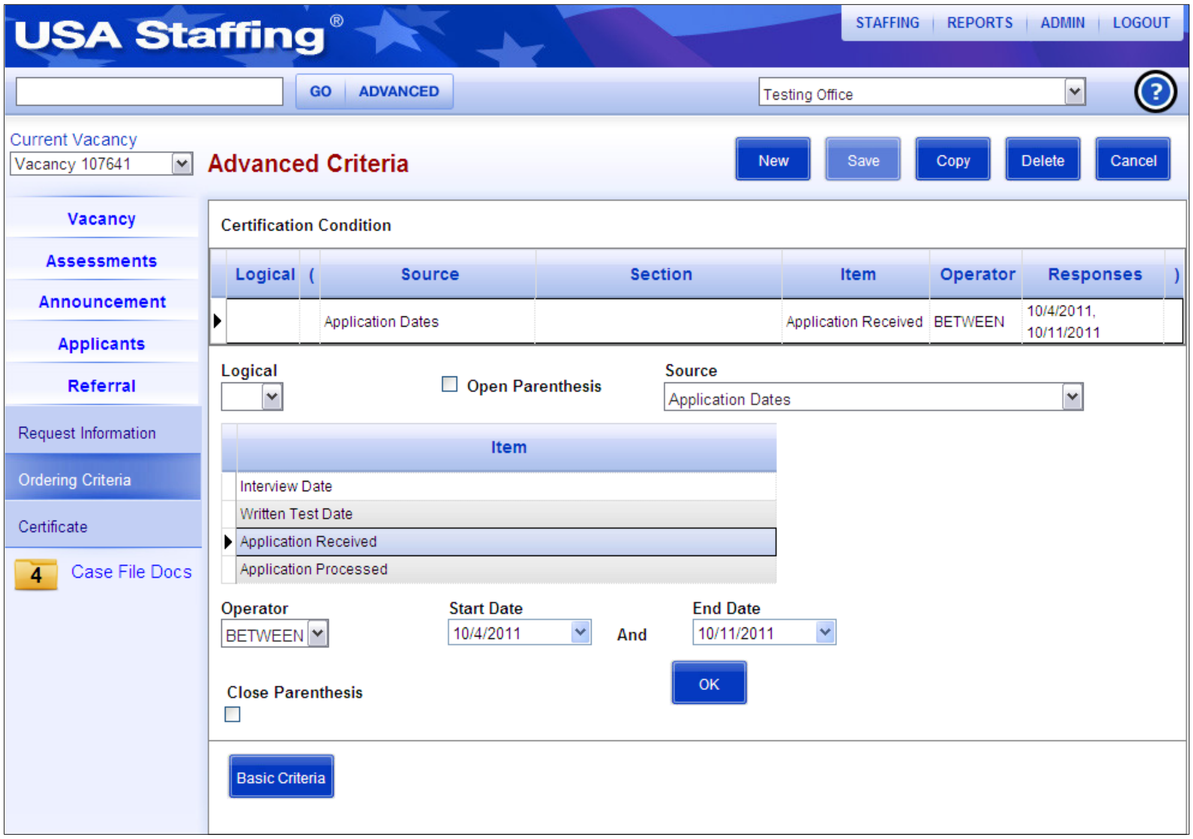
Preview Certificate. This button appears near the bottom of the Ordering Criteria page if no referral list/certificate has been issued. This button is disabled until you click the Save button. Click the Preview Certificate button. A tentative list of applicants is created when the Preview Certificate button is selected.

Advanced Criteria. To use advanced criteria, you must set up the Ordering Criteria page, save it, and click the Advanced Criteria button. Advanced criteria allow you to establish additional certificate criteria to narrow the applicant list. The criteria established on the Ordering Criteria page combined with the Advanced Criteria will act as filters to the applicant list.

Applicants must meet the requirements specified on both the Ordering Criteria page and Advanced Criteria page before their name will appear on the list.

- On the Advanced Criteria page, click the New button at the top of the page.
- When the page refreshes, two tables will display. The lower table contains questionnaire items. These are related to the items displayed in the Source drop-down box.
- Click the Source drop-down box to display the source to be added.
- Select the advanced criteria item from the lower table. If responses are associated with the item, a dialogue box will display the response.
- Select one or more of the responses to include in your query by clicking on one of the required responses. Hold the Ctrl to select additional items. The selected items will be highlighted in blue.
- The Operator drop-down allows you to select either Include or Exclude for the responses selected. The system default is Include.

- Click the OK button once you have made selections. The selected item and response(s) will load to the upper table.



Note: If you plan to select additional advanced criteria items, select either the "AND" or the "OR" option from the Logical drop-down. You must use one of these for each line item in your upper table.

The "AND" logical item informs the system to include item 1 (in your upper table) "AND" item 2, making items 1 and 2 required.

The "OR" logical item informs the system to include item 1 "OR" item 2, making either item 1 "OR" item 2 required.

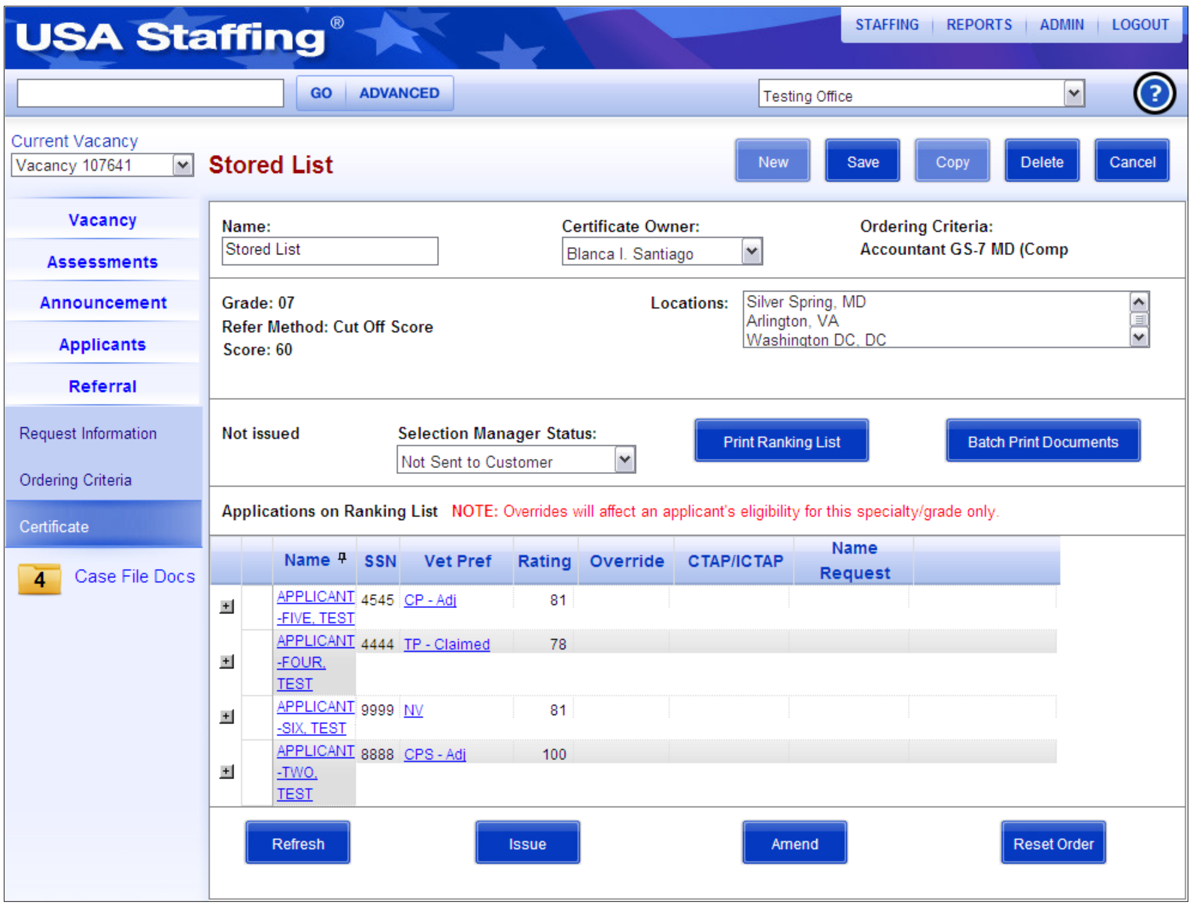
- Once the advanced criteria are configured, click the Basic Criteria button to return to the Ordering Criteria page.

- Click the Save button on the Ordering Criteria page.

Note: When parentheses are used, the system will apply the parenthesis condition first and then apply the condition outside the parenthesis. For example, use Open Parenthesis and Close Parenthesis to combine an OR condition: (Item 1 OR Item 2) AND Item 3.

Stored List

If your ordering criteria are complete and there are applicants who meet the criteria, the system will generate a Stored List. The Certificate Owner drop-down list initially shows the user specified as the vacancy owner. If appropriate, another user can be designated as the certificate owner by selecting his or her name from the list. The applicants display in a table in the order they will appear on the certificate. The table columns display: Name, SSN, Vet Pref (if applicable), Rating, CTAP/ICTAP claim, and Name Request (if applicable). You can rename the list by clicking the Name field in the upper left corner of this page. (Not required).



The Stored List page provides functionality that allows you to perform the following applicant maintenance functions directly from this page.

- Adjudicate Veterans Preference – Applicant records with Veterans Preference claims that have not been adjudicated will display as Claimed. Those with adjudicated preference will display as Adjudicated. Clicking on an applicant's Veterans Preference rating will take you to the Vet Preference page of the applicant's record where you can adjudicate the vet preference, save the changes, and click the Back button to return to the Stored List page. Click the Refresh button for this change to take effect.

- Override Applicant Ratings – Clicking on the Override field next to an applicant's rating will allow you to apply an ineligible code. Please note that any rating overridden in the Stored List page will affect an applicant's eligibility for that specialty and grade. Once you have overridden the applicant's eligibility for this specialty and grade and click the Save button, the system will automatically reload the Stored List page and that applicant will no longer appear on the list. To revert the ineligible rating to its original rating, the Override box can be unchecked directly on the applicant's record and the applicant will be reverted to the original eligible record status code. When the Refresh button is selected on the Stored List page, the applicant will be placed back on the list.

- Adjudicate CTAP/ICTAP Eligibility – Applicants claiming CTAP/ICTAP will display as CTAP or ICTAP –Not Reviewed. Those with reviewed claims will not display unless determined qualified. These records will display as CTAP or ICTAP Qualified. Clicking on an applicant's CTAP/ICTAP rating will take you to the applicant's Application Information page, where you can adjudicate their eligibility, save the changes, and click the Back button to return to the Stored List page. You will then see the change reflected on the Stored List.

- View available supporting documents by clicking the plus sign next to the applicant's name. You will then be able to open the documents in a new window.

- Refresh list to apply changes such as Vet Preference adjudication.

- Issue Certificate – The system will automatically close the Stored List screen and move the applicants to the Certificate page.

- Amend list to add or remove applicants.

- Sort list by clicking on any column. For example, applicants can be sorted by clicking the Vet Pref column.

- Return the list to certification order (if sorting was done) by clicking the Reset Order button at the bottom of the screen.

- Print Ranking List – Clicking this will generate a PDF preview of the Ranking List. Review the applicants on this list to verify their qualifications before certifying. The ranking list will display as a Stored List on the Certificate page.

- Batch Print Documents – Choose this to generate a PDF document of all supporting documents associated with the Ranking List. An email is sent to the user when the batch print file is available.

- Once you have refreshed and finalized the Stored List, click the Issue button to generate the certificate.

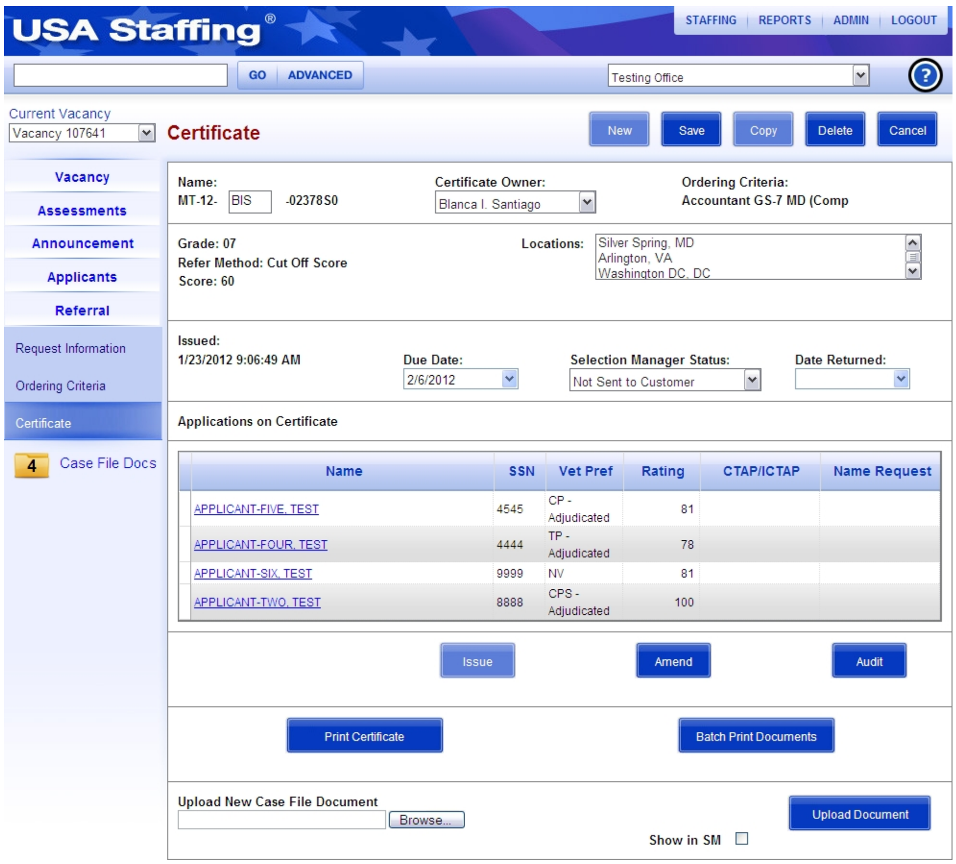
HOT TIP! When you click the Issue button, the system may alert you with a message to this effect: "There is one applicant still in Pending status. If you issue this certificate now, you may cause this applicant to lose consideration to which they may be entitled. Do you still want to issue this certificate? (Y/N)"

This means that you have one or more applicants with a status code of one of the following:

- PF: A required form has not been received.
- PL: A required assessment either has not been completed or is not linked. There may be a mismatch for you to resolve.
- PQ: The record is still waiting for Quality Review.
- PJ: An error in the assessment may be causing an incorrect or suspect rating.
- PM: A manual rating process has been specified, but the applicant's rating has not been entered.
- PE: There is an error in the applicant's record.

Certificate

The Certificate is generated when you click the Issue button on the Stored List page. The certificate name then changes from Stored List to a system-generated certificate number. The Certificate Owner drop-down list initially shows the user specified as the vacancy owner. If appropriate, another user can be designated as the certificate owner by selecting his or her name from the list.



Use the Certificate page to do the following:

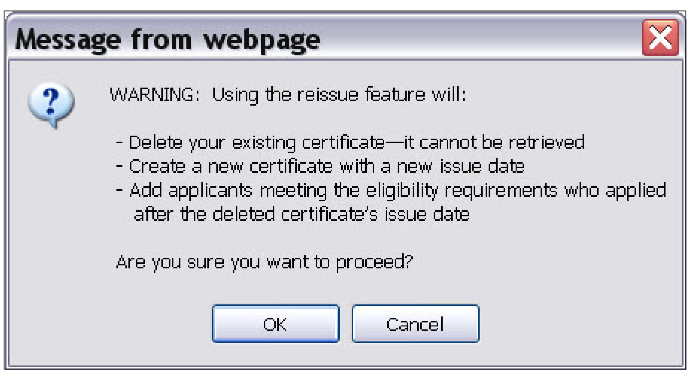
- Go into the listed applicant records.
- Generate a referral list/certificate or supplement based on the ordering criteria established.
- Generate a ranking list.
- Make changes to a referral list/certificate, even after it is issued.
- Reissue a list (start over). Clicking this button will alter the original list.

This page displays information carried over from the Ordering Criteria page, like the Ordering Criteria Name, Grade, Locations, Refer Method, and Score. These items cannot be modified. After the referral list/certificate is issued, the issued date and due date will populate.

The following options are available on the Certificate page:

- **Selection Manager Status.** The four possible status types are the following:
    - Not Sent to Customer – This is the default when the certificate is issued.
    - Sent to Customer – Change the status to Sent to Customer so that the system sends the referral list/certificate to Selection Manager and an email notification to the customer contacts added on the Sent To field of the Request Information page.
    - Customer Audit Received – The system will automatically display this status when the certificate is returned electronically from Selection Manager.
    - Recalled – If you select this status and click Save, the system removes the certificate from Selection Manager and it will no longer be available to the selecting official. Also, this status displays for certificates automatically removed from Selection Manager after their due date. This automatic recall action is a configurable item for Selection Manager in Administration > Preferences > Configurations.
- **Due Date.** The system automatically fills in this field based on options set in Preferences – Configurations in the Administration area. You can override the date by typing a different date or by clicking the down arrow on the date box and selecting a date from the calendar.
- **Date Returned.** The system automatically fills in this field when the certificate is returned electronically through Selection Manager.

  Note: This button is not intended to be used as a way to resend a certificate to Selection Manager, amend a certificate, or create a supplemental certificate. A warning message (shown below) is presented when the Reissue button is selected to reduce incidents of users inadvertently reissuing certificates.



Note: Use caution when you choose the Reissue option. Be sure that all obsolete versions of the list are identified and not used for selections; otherwise, invalid selections may result. Only the names and the rank order of the reissued list are valid for selection purposes.

- **Issue.** This button will be grayed-out when the certificate is issued on the Stored List page.

- **Amend.** You click the Amend button when you want to make a correction—such as adding or removing a name—in the referral list/certificate but you want the rest of the list to be the same. The original Issued date is used, and the random number and the general order of the list remain the same.
    - **Add Name.** Use this with the Placement After and Before buttons to amend a list that is in preview or that has been issued.
    - **Delete Name.** Use this with the Placement After and Before buttons to amend a list that is in preview or that has been issued.
- **Audit.** Click this button to audit the certificate. The system will open the Audit page.
- **Print Certificate.** Click this button to generate a printed or electronic file copy of the certificate. The system will generate a cover sheet indicating vacancy information, i.e., ordering criteria, selection criteria, position, etc., and a list of the eligible candidates for the position.

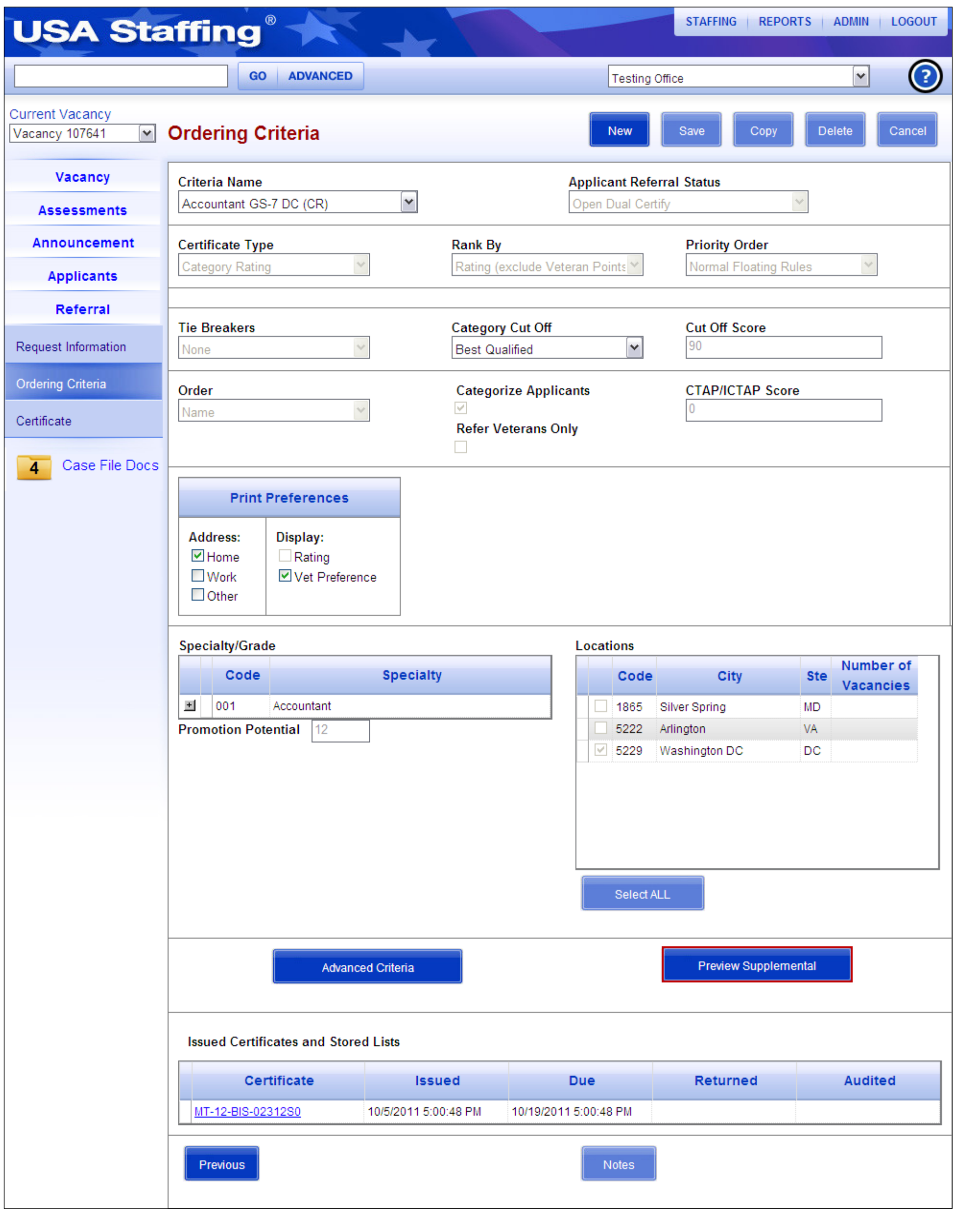
  Batch Print Documents. Click this button to generate a PDF document of all supporting documents associated with the Ranking List. An email is sent to the user when the batch print file is available.

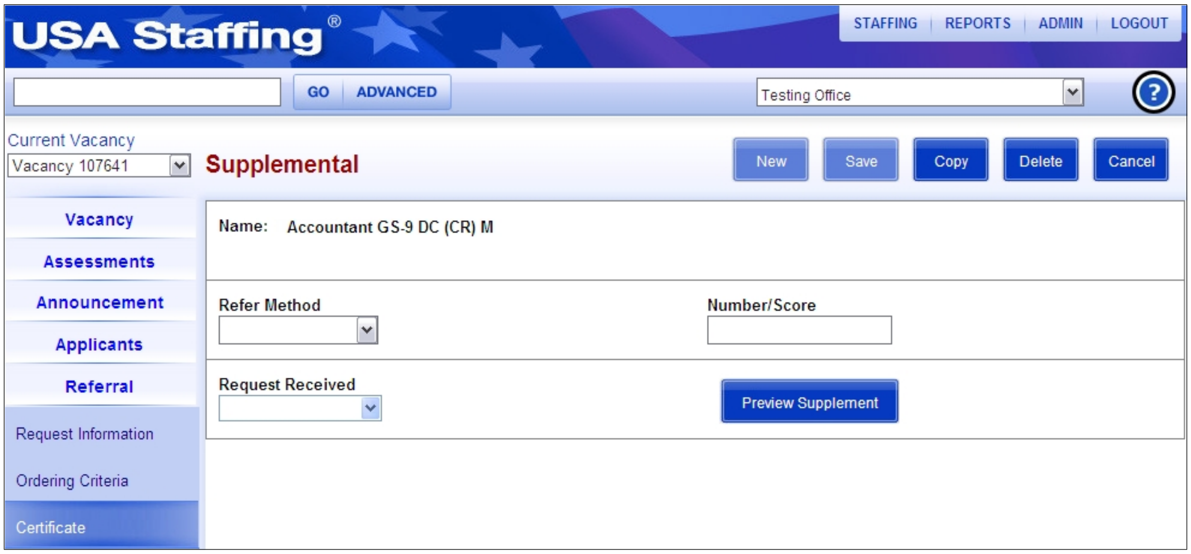
HOT TIP! The Upload New Case File Document section allows you to upload case file documents for a certificate. Documents uploaded here are listed in the Vacancy > Case File Documents page and will undergo a virus scan.

Supplemental Certificates

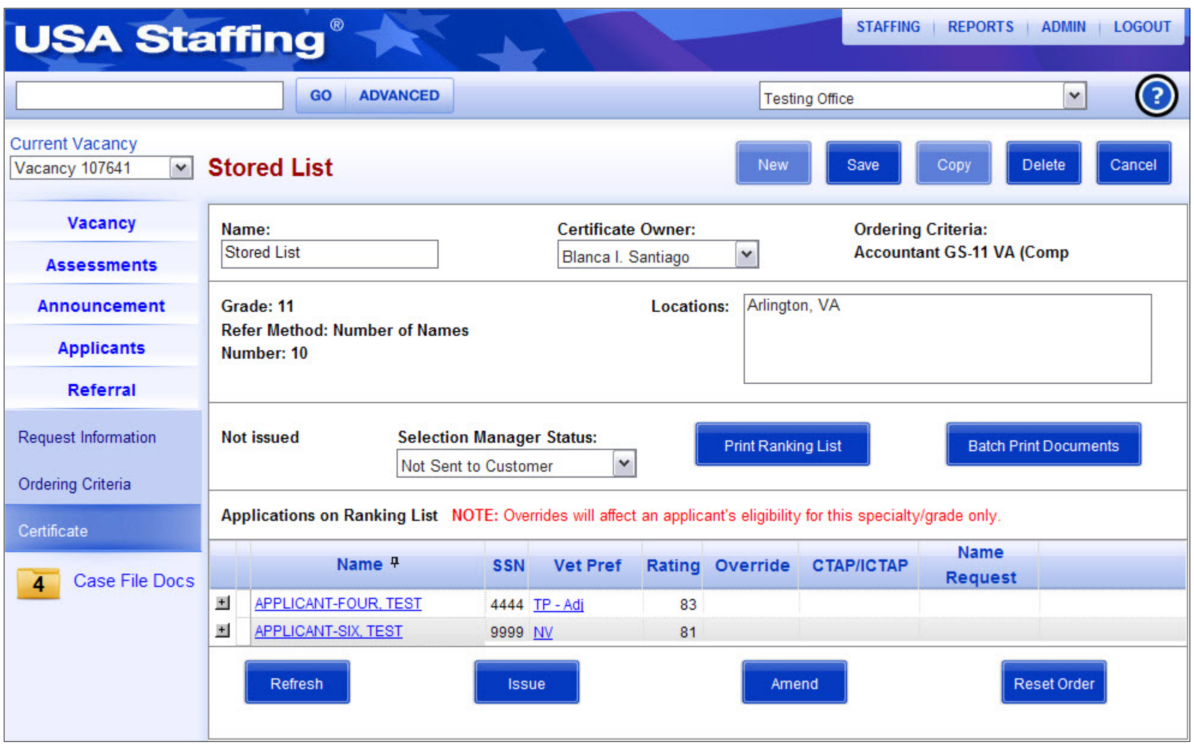
The supplemental certificate is an extension of the original certificate. The ordering criteria remain the same with the exception of the number of names or cut off score requested on the original. Supplemental certificates have an S1, S2 designation at the end of the certificate number. Original certificates end with an S0 designation. Supplemental certificates should be issued when the basic certificate is still outstanding and the selecting official/manager has requested additional names. To issue a supplemental certificate:

- Click the Preview Supplemental button to set up the criteria for the supplemental certificate. This button appears near the bottom of the Ordering Criteria page if a referral list/certificate has been issued against the request.





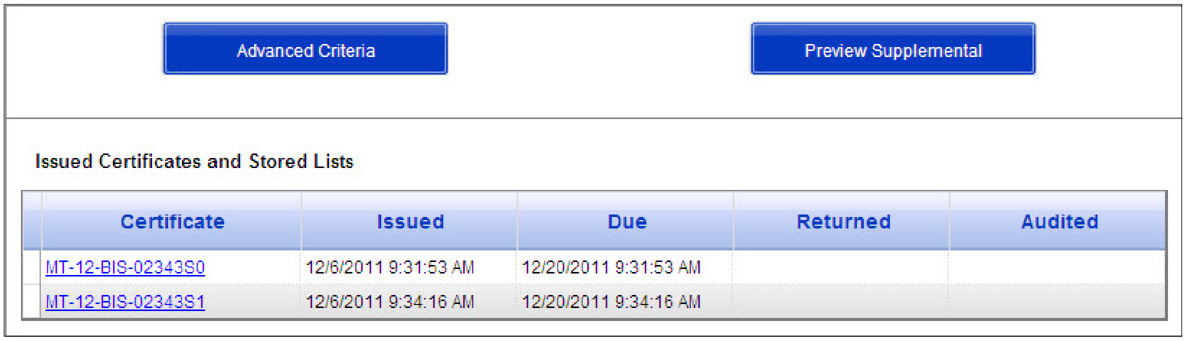
- Click the Preview Supplement button to view the supplemental stored list.



- Click the Issue button on the Stored List page to issue the supplemental certificate.

Note the S1 designation at the end of the certificate number, MT-12-BIS-02343S1.

If supplemental certificates are issued, they will appear in the table at the bottom of the Ordering Criteria page. By clicking on the certificate number, you can jump to the Certificate page.

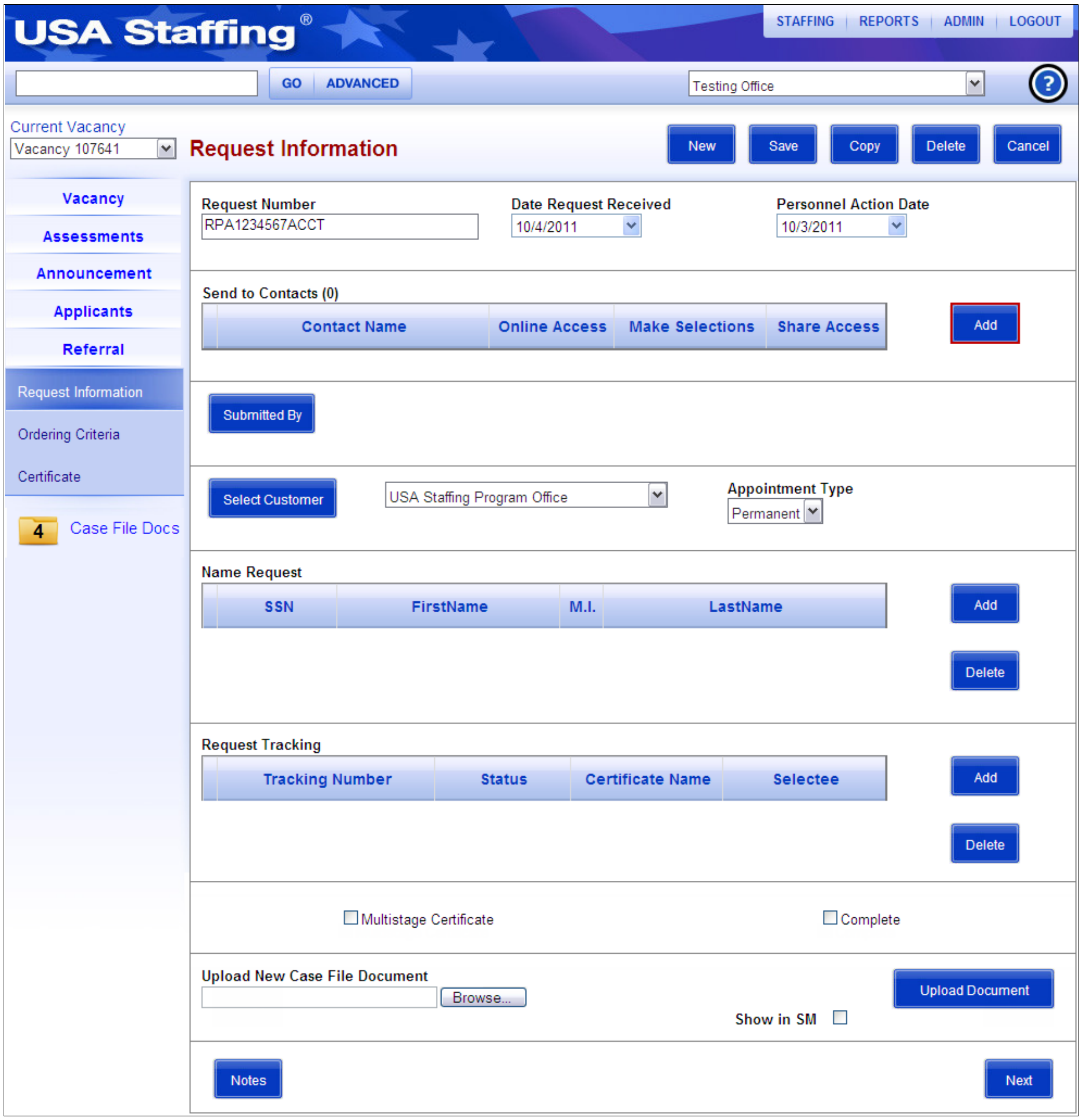


Selection Manager

Selection Manager is the hiring official's interface for USA Staffing. In Selection Manager, hiring officials can access referral lists/certificates, review application materials (for example, resumes, transcripts, and questionnaire responses), upload documents, make selection decisions, add notes, and return certificates electronically to the human resources office that issued it.

Here is the typical sequence of events:

- Create a contact record associated with the customer assigned to this VIN. The hiring official must be created as a contact under the customer to access the Selection Manager area. Once the contact is established, you must assign that contact on the Referral page by using the Send To Contacts Add button. Refer to the Administration segment of this manual to learn more about setting up customers and contacts.



- When you issue the referral list/certificate, change the Selection Manager Certificate Status from Not Sent to Customer to Sent to Customer. This will put the referral list/certificate in Selection Manager.

When the Selection Manager Certificate status is set to Sent to Customer, the system will send an email to the contacts specified on the Request Information page, notifying them the list is ready for their review and providing a URL for them to access Selection Manager.

Sample Email Notification to Contact Re: Availability of Referral List/Certificate

Sample Email Notification to Contact Re: Availability of Referral List/Certificate
From: USA Staffing Office To: Manager, John Subject: Certificate for Vacancy 107641, Accountant, is available for viewing Your HR office has sent the following certificate for you to review: MT-12-BIS-02343S0 for Request 12-107641-01 You may access this certificate by logging into USA Staffing **Selection Manager** through the link below. Click the link below or copy and paste the URL into the "Address" field of your Web browser to retrieve the list of eligible job applicants: https://selectionmanager.usastaffing.gov/ If you are unfamiliar with Selection Manager, please visit http://help.usastaffing.gov/selectionmanager for detailed instructions. If you need additional information concerning the list of applicants or selection procedures, contact Jill Smith (202)606-0000. Note: this is an automated email message. Please do not reply directly to this message. ------------------------------ Office of Personnel Management

Note: The contact listed in the email is typically the person who issued the certificate unless this default value is changed under Configurations for the Selection Manager Category in the Administration area.

The hiring official clicks on the URL specified in the email and logs in. Once logged in they will see the available certificates.

When the hiring official has finished working the certificate and makes the tentative audit, they can return the certificate to the USA Staffing user. Once the selecting official returns the certificate, the person listed in the notification email is alerted the certificate has been returned. See the example on the next page.

Sample Email Notification to Staffing Specialist to Complete the Audit of a Referral List/Certificate.

Sample Email Notification from Selection Manager to the Staffing Specialist to Complete the Audit of a Referral List/Certificate
From: USA Staffing Office To: Smith, Jill Subject: A certificate for Vacancy 107641, Accountant, has been returned to the HR office by John Manager John Manager has returned a certificate MT-12-BIS-02343S0 for your review and processing. You may take action on this certificate by logging into USAS Staffing® or by clicking the link below https://usastaffing.opm.gov/USAStaffing/Staffing/Referral/Certificate.aspx?ChangeContext=Y&ContextType=Vacancy&ContextID=0&ID=4120800&CRITERIAID=4360963&CERTIFICATEID=4962231 Note: this is an automated email message. Please do not reply directly to this message. ------------------------------ USA Staffing® System

Amending a Referral List/Certificate

To remove a name from the list, take these steps:

- Click the Amend button. The upper table of the Amend page shows the names on the certificate in the order specified on the Criteria page.
- Click somewhere (other than on the word Open) on the row of the name on the list that you want to remove. The black cursor arrow will appear in the leftmost column to show that the row is selected.
- Click the Delete Name button. The name will be removed from the referral list/certificate preview list and will be added to the Add Applicants table at the bottom of the page.
- Click the Save button.

To add a name to the list, take these steps:

- Click the Amend button. The upper table of the Amend page shows the names on the certificate in the order specified on the Criteria page.

- Click somewhere (other than on the word Open) on the row of the name on the list before or after which you want to insert a name. The black cursor arrow will appear in the leftmost column to show that the row is selected.

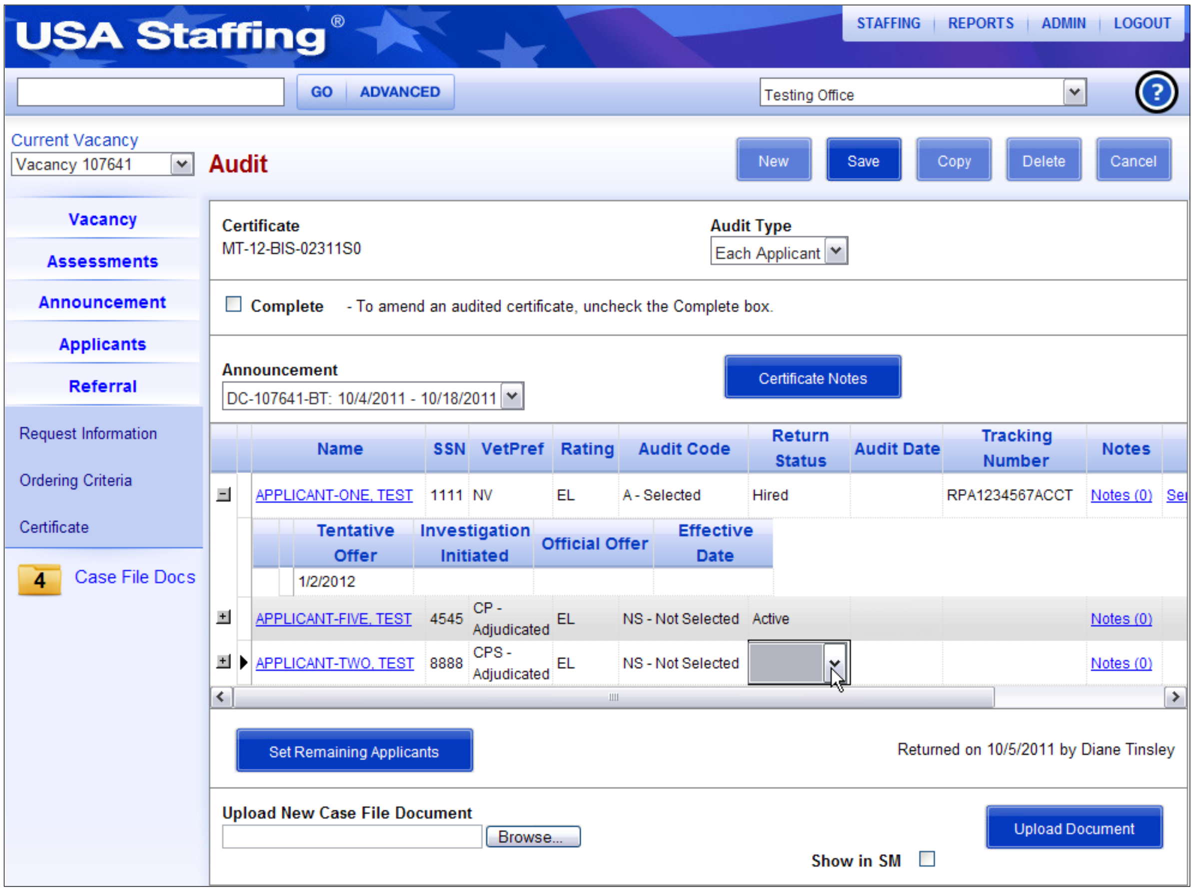
- Click to select the appropriate radio button:
  - o After – if you intend to insert a name after the one you pointed to in the previous step.
  - o Before – if you intend to insert the name before the one you pointed to in the previous step.

- Select the name of the applicant you want to add from the lower table. The black cursor arrow will appear in the leftmost column to show that the name/row is selected.

- Click the Add Name button. The page will refresh to include the applicant selected from the lower table.

Audit

An audit is a review of a returned referral list/certificate to ensure that the action taken by the selecting official complies with legal and regulatory requirements. The Audit page is where you will enter the results of the audit process and notes associated with the certificate audit.



A signature, title, and date stamp is placed at the bottom of the Audit page when a certificate is returned from Selection Manager.

Even in situations that do not involve outside hiring in the Federal government—which, therefore, are not bound to follow the Delegated Examining Operations Handbook (DEOH)—it is important to complete the Audit page promptly when the selecting official is finished with the list. Completing the audit has the following results:

- The records of selected applicants are coded so that they no longer are referred for other requests on the same VIN of equal or lesser appointment duration.
- The records of non-selected applicants are coded to make them available for future referrals.
- The records of applicants that should not be referred due to declining location or salary may be coded to prevent future referral.

Failure to enter audit actions will cause your records for the selection and disposition of all affected applicants to be inaccurate. It may lead to applicants losing consideration for other positions to which they may be entitled. For best results, enter audit actions promptly and strive to do it before issuing subsequent referral lists/certificates or supplements.
There are three audit types:

- **Each Applicant.** Select this audit type when a selection has been made. You may also use this audit type when the referral list has been cancelled or returned unused, but each applicant record will need individual audit entries.

- **Cancelled.** Select this type when the referral list/certificate was cancelled after being issued and there are no audit results to enter for any applicants.

- **Unused.** Select this type when the referral list/certificate was returned unused and there are no audit results to enter for any applicants.

HOT TIP! The Upload New Case File Document section allows you to upload case file documents for an audited certificate; for example, a declination letter. Documents uploaded here are listed in the Vacancy > Case File Documents page and will undergo a virus scan.

Here is how you perform these different audit types:

Audit Type = Each Applicant

- Select Each Applicant from the Audit Type drop-down box if it is not already selected.

- For each name on the list, click the cell under the heading Audit Code. This will cause the cell to turn into a drop-down selection box.

- Select the appropriate Audit Code. Use the scroll bar to move through the options and click the appropriate code to select it.

  - A - Selected
  - CA - Certificate Cancelled
  - CE - Career Or Career Conditional Employee
  - CR - Communication Returned Unclaimed
  - DA - Declined Employment With Agency
  - DD - Declined Until A Future Date
  - DE - Declined Examination Program
  - DG - Declined Grade Or Salary Considerations

- DL - Declined Location
- DP - Declined Position
- DR - Accepted Another Position With Agency
- DX - Declined Federal Employment
- DZ - Declined Other Reason
- FR - Failed To Reply To Their Inquiry
- MI - Not Referred/Not Considered
- NA - Select On Another Certificate
- NC - Appointed By Non-Competitive Action
- NN - Not Selected - Not Contacted
- NP - Not Available Pending
- NS - Not Selected
- O1 - Not Selected - AS 1
- O2 - Not Selected - AS 2
- O3 - Not Selected - AS 3
- OW - Offer Withdrawn
- RC - Removed From Certificate Security
- RD - Removed from Certificate Driving
- RE - Removed From Certificate Eligibility
- RM - Removed From Certificate Medical
- RQ - Removed From Certificate Not Qualified
- RS - Removed From Certificate Suitability
- RX - Removed from Certificate Drug Screen
- TE - Temporary Employee
- UN - Certificate Unused
- WC - Withdrawn from Consideration

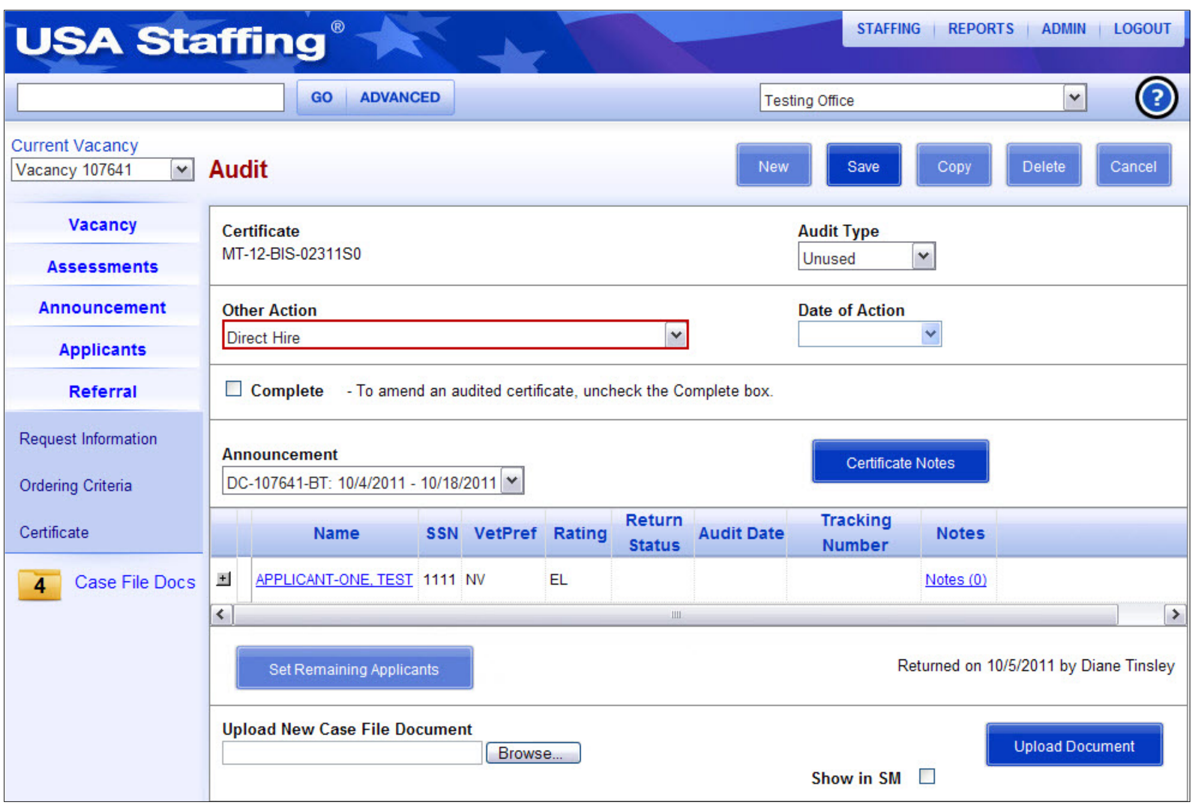
- Click the cell under Return Status and select the appropriate status:
  - Active – This status is the most commonly used and indicates that an applicant is still under consideration and eligible should another certificate be issued.
  - Hired – This status is used along with the Selected Audit Code for selected/hired applicants.

- Inactive – This status would prevent an applicant from being referred on subsequent referral lists/certificates for that particular VIN. This could be used when the applicant has declined, failed to respond to inquiries, or is otherwise no longer in consideration at their own request.
- Suspend – This status is used to take an applicant out of consideration, typically for failing to meet some type of job requirement or during a suitability determination. It is rarely used.

- Repeat the third and fourth steps for each remaining applicant, or, if you reach a point where all subsequent applicants will have the same Audit Code and Return Status, you can use the shortcut—Set Remaining Applicants—located at the bottom of the Audit page.
- Click the Save button at any time to save your work. It is a good idea to save often.
- If known, input the Tentative Offer, Investigation Initiated, Official Offer, and Effective Date in the fields provided.
- Click in the box and enter the date(s), as appropriate.

Audit type = Unused

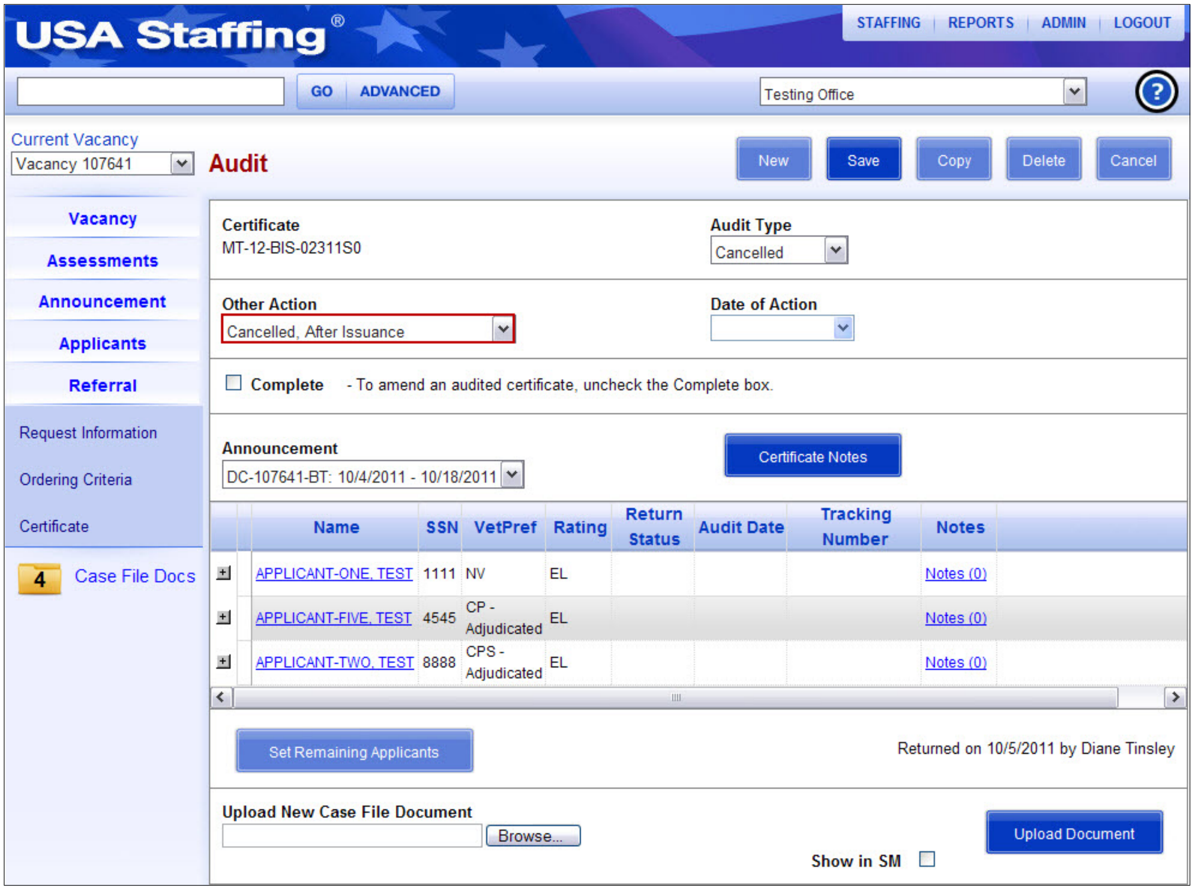
- Select Unused from the Audit Type drop-down box. The page will refresh with the proper form for this audit type.



- Select the appropriate Other Action to document why the referral list/certificate was returned unused.
- Select a Date of Action and click the Save button.

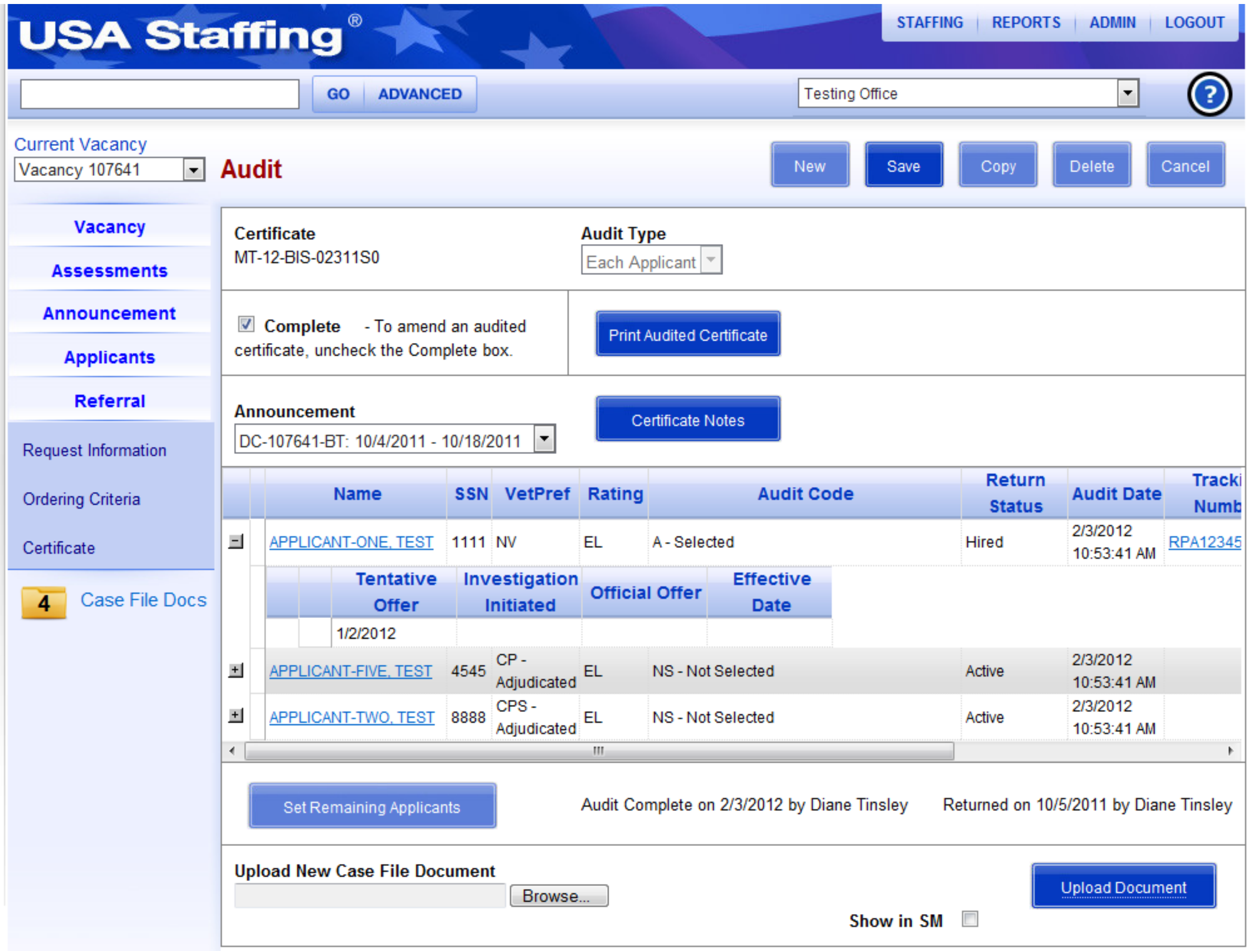
Audit Type = Cancelled

- Select Cancelled from the Audit Type drop-down box. The page will refresh with the proper form for this audit type.



- Select the appropriate Other Action to document why the referral list/certificate was cancelled.
- Select a Date of Action.
- Click the Save button.

Print Audited Certificate. This button allows you to print a copy of the certificate showing the Agency Action column and completed and the electronically signed selecting official signature, if the certificate was returned from Selection Manager.

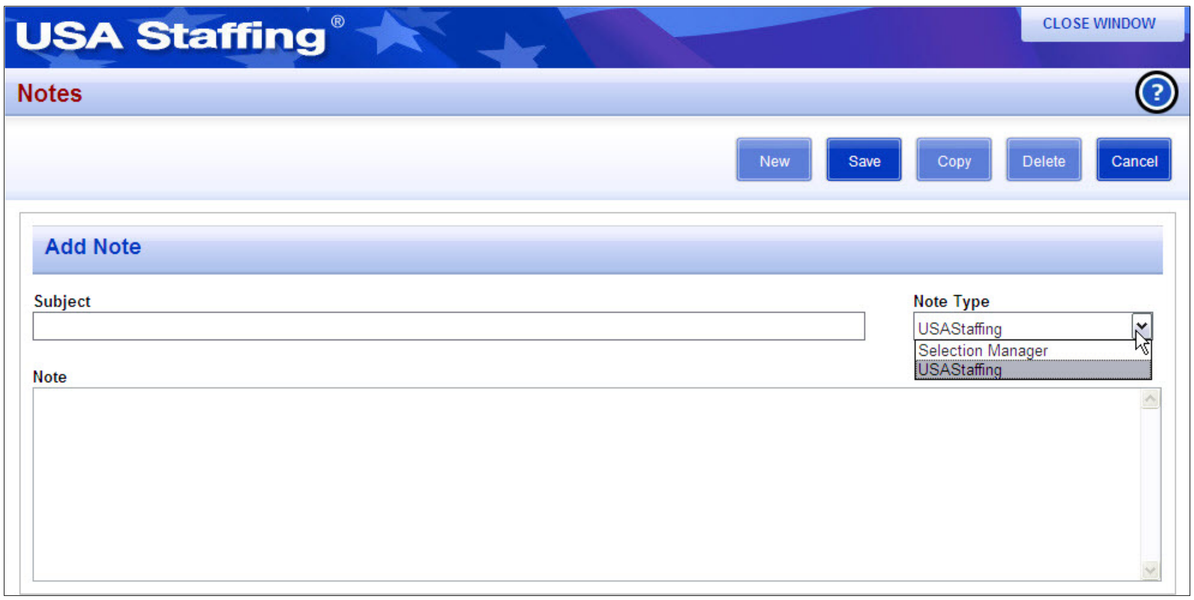


Certificate Notes. This button allows you to enter notes at the certificate level.

A Notes column with links to individual applicant audit notes is available. USA Staffing users can click the Notes link to view or add individual applicant audit notes. Applicant notes added through the Selection Manager Applicant Notes feature will be visible on this page.

Applicant notes added in the USA Staffing Audit page will only be visible in Selection Manager if the Selection Manager Note Type is selected and the certificate is in Sent to Customer status. If the USA Staffing Note Type is selected, the applicant note will only be visible in USA Staffing.

Notes entered directly in the applicant's record will not be visible in the applicant Notes column on the Audit page, nor will they be visible in Selection Manager.



Check Your Skills – Issue a Referral List/Certificate

Take 45 minutes to work individually generating a referral list/certificate for a vacancy you created earlier.

Generate a referral list/certificate for one of your vacancies by doing the following:

1. Click the Referral button.
2. Click the New Request button.
3. Click the Request Information box and enter the appropriate information on this page.
4. Click the Next button to go to the Ordering Criteria page.
5. Enter the appropriate information on this page.
6. Click the Save button.
7. Click the Preview Certificate button to display the referral list with the names of the top eligible candidates.
8. Click the Issue button.
9. Review your referral list/certificate.
10. Click the Print Certificate button.

Repeat Steps 1 through 10 for another vacancy.

Check Your Skills – Notification Letters

Take 15 minutes to work individually practicing sending Notification Letters by mail or email to applicants who were referred to the selecting official.

Email the Notification Letter for one of your certificates by doing the following:

1. Click Reports at the top navigation bar.

2. Click Notification Letter under the Referral button on the left menu bar.

3. Enter your VIN.

4. Click the Get List button to the right of Certificate. A list of certificates will be displayed in the selection window.

5. Select the Certificate.

Note: Steps 6–7 are not necessary or recommended if you are issuing a letter to all applicants on the certificate. If you want Notification Letters to go to all Referred and Eligible Not Referred applicants, simply select the certificate and move to Step 8.

6. Click the Show List button to the right of SSN (75). A list of applicants, with their SSNs, will be displayed in the selection window.

7. Select the applicants (up to 75 names) to whom you want to email the Notification Letter by doing one of the following:

   - Select only one applicant. Click the applicant's name, and click the Select button under the selection window. The selected applicant's SSN will show up in the SSN window.

   - Select two or more applicants. You may select multiple applicants in one of the two ways described below.

     - Select a number of applicants listed in sequence. Click the first name you want, press down on the Shift key, and click the last name you want. Then click the Select button under the selection window. This will put the first name, the last name, and all the names in between in the SSN window.

     - Select two or more applicants not listed in sequence. Click the first name, press down on the Ctrl key, and click the next name, and so on until you finish selecting all the applicants to whom you want to send a Notification Letter. Then click the Select button under the selection window. This will put all the names you have selected in the SSN window.

8. Select the Sort By option by clicking on either Last Name or SSN.

9. Check the Include Eligibles Referred box to generate letters for eligible applicants who were referred. This box is checked by default.

10. Check the Include Eligibles Not Referred box to generate letters for eligible applicants who were not referred.

11. Check the Include Ineligibles box to generate letters for ineligible applicants.

12. Check the Include NOR Message Codes box to include the Notice of Results message code in the letter.

13. On the Report Options section, select Send Email and Store Printable Letters from the Action drop-down list to have the system send the letter to applicants who specified an email address in their application and store a printable copy of the letter for those applicants who did not provide an email address in their application.

Note: A copy of the emailed letters is automatically saved in the Applicants > Report Information Page and their Application Manager account. Once sent, emailed letters cannot be removed from Application Manager or the applicant’s record.

14. Select PDF as the Store Format.

15. Check the Notify me of report request status box to have the system email you when the report request is received and again once it is complete.

16. Click Go after you have made all report criteria and report options selections, and are ready to generate the report. A confirmation message will display. Make a note of the Stored Report ID so that you can easily identify it on the Stored Reports page.

17. Click OK. Your report request is forwarded automatically to the report server.

18. Once the report is complete, click Stored on the top navigation bar to access the Stored Reports page. The screen will refresh to show all the stored reports. You can identify your report through your user name or your VIN.

Sample Message That Request Is Being Processed
From: USA Staffing Office To: Smith, Jill Subject: Email Notification Letter Requested – VIN107641 The report request is being processed. After the report has been generated according to the schedule, it can be located on the Stored Reports page. You will be sent an e-mail after the request is complete. If you have any problems, please log into FootPrints at web address http://eshelp.opm.gov and open a trouble ticket and reference Stored Report ID: 194890 PLEASE DO NOT RESPOND TO THIS MESSAGE. IT WAS GENERATED AUTOMATICALLY.

Sample Message That Processing of Request Is Complete
From: usastaffingoffice@opm.gov To: Smith, Jill Subject: Email Notification for Notification Letter – VIN107641 The report you requested for 107641, Accountant, is complete. For Stored Report ID: 194890, a total of 3 email(s) have been successfully sent and a total of 1 letters are to be manually mailed. The report(s) can be located on the Stored Reports page under StoredReportID: 194890. If you have trouble viewing any of the documents, please log into http://eshelp.opm.gov, create a trouble ticket, and reference Stored Report ID: 194890. Note: This is an automated email message. Please do not reply directly to this message. ------------------------------ USA Staffing® System

Check Your Skills – Audit a Certificate

Take 10 minutes to work individually to audit a certificate that has been issued.

1. Log into USA Staffing.
2. Enter the VIN.
3. Go to Referral and find your certificate.
4. Click the Audit button to go to the Audit page.
5. Select the Audit Type:
   - Each Applicant
   - Cancelled
   - Unused
6. Select Each Applicant.
7. For each name on the list, click the cell under the heading Audit Code.
8. Select the appropriate Audit Code. Repeat for each applicant.
9. Click the cell under Return Status and select the appropriate status: Active, Hired, Inactive, or Suspend. Repeat for each applicant.
10. For candidates shown as Hired, enter applicable dates.
11. Click the Save button at the top of the screen.
12. Mark the certificate as complete by clicking in the Complete box.
13. Click the Save button.

Check Your Skills – Section Summary

Take 60 minutes to work individually to create a vacancy, release a job announcement, create applicant records, and issue a referral list/certificate. By the end of the exercise, be ready to share the following with your instructor:

- VIN
- Assessment name
- Announcement number
- Referral list/certificate emailed to your instructor

1. On the top navigation bar, click Staffing.

2. On the left menu bar, click the Vacancy button.

3. You will now be at the Advanced Search screen. Click the New button.

4. Enter your vacancy's position title in the text entry box under Position Title.

5. Put a checkmark on Competitive by clicking on the box to the left of it.

6. Put a checkmark on Merit Promotion by clicking on the box to the left of it.

7. Select Federal as Employer Type.

8. Enter the Minimum Salary and Maximum Salary.

9. Click the Save button at the top of the page.

10. Write down your VIN: ___________________.

Note: The Select Customer button will now be activated.

11. Click the Select Customer button. The Advanced Search screen will display.

12. Enter the customer's name you created in the previous exercise.

13. Click the Go button to conduct a partial search on the customer's name. You will see a list of the customers whose names match the name you entered.

14. Find your customer's name and click on the name.

15. You will navigate back to the Position Information page. If only one customer is found, it will automatically populate in your announcement.

16. If the correct customer is displayed, click the Next button to go to the next page and automatically save your work. You will be on the Assessment Info page.

17. Click the Next button. You will be on the Supporting Documents page.

18. Click to check the Accept boxes to the left of all types of documents.

19. Click the Next button. You will be at the Request Management page.

20. Enter the appropriate information on this page.

21. Click the Next button. You will be on the Case File Documents page.

22. Click the Next button. You will be on the Vacancy Categories page.

23. Enter the categories for the vacancy.

24. Click the Next button. You will be on the Assessment page.

Note: The following steps will walk you through adding an assessment from the Assessment Library. If you would like to import an assessment or build one from scratch, please refer to the Assessment portion of your training manual for guidance.

25. Click the Library button. You will be on an Advanced Search page for Assessments.

26. Select your name from the Assessment Owner drop-down list.

27. Click the Go button.

28. Click on the assessment name you want to open. You will now be on the Assessment Information page.

29. If the assessment is marked Complete, uncheck the box and rename the assessment (include your initials) to make it unique to your vacancy.

30. Click the Save button

31. Select the Questionnaire Builder item on the left menu bar.

32. Click the plus sign to the left of each factor. You should be able to see the factors and the questions for each factor.

33. Click any of the questions to go to the Item Editor page.

34. Modify the question you selected in the Text Editor screen.

35. Click the Save button.

36. Click the Rating Criteria button on the left menu bar.

37. Click the plus sign next to the specialty.

38. Make sure all checkmarks are in the appropriate column(s) to the right of each factor that you are using to indicate if the factor is a Rating Factor or a Screen-Out Factor.

39. Click the Save button.

40. Click the Test button at the top of the page.

41. For Test Applicant 01, enter the responses manually.

42. Click the Save button.

43. Click the New button to create an additional test applicant.

44. Click the Randomize button.

45. Ensure the screen-out questions have the correct response to rate the test applicant either eligible or ineligible.

46. Click the Save button.

47. Repeat steps 43 - 44 until you have four Test Applicants.

48. Click the Rate All button. A Test Rating Summary Report should appear.

49. If the Final Ratings are correct, close the Report and click the Next button at the bottom of the page.

50. Click OK on the “Mark This Assessment Complete?” popup screen. This will bring you back to the Assessment page, where the Complete box should be checked.

51. Click the Announcement button.

52. Enter an announcement number.

53. Select the opening and closing dates from the calendar. For training purposes, set the open date to the current date.

54. Click the Save button.

55. Click the Internal Contact button.

56. Search for the Last Name of your Internal Contact.

57. Click the Go button.

58. Click the External Contact button.

59. Search for the last name of your external contact.

60. Click the Go button.

61. Click the Next button to go to the Assignments page.

62. Click the Next button to go to the Specialty/Grade page.

63. Verify the specialties and grades are checked.

64. Click the Next button to go to the Locations page.

65. Enter the Total # of Vacancies for the Announcement

66. Click the New button.

67. Select the appropriate State from the State drop-down list. Select the City or County from the drop-down list

68. Click the Save button.

69. Select a location and enter the number of vacancies you have for that location.

70. Click the Save button.

70. Click the Next button to go to the Templates page.

71. The instructor will provide information on the template to use.

72. Table Type ____

73. Template Name ____________________________________

74. Click the Next button to go to the Overview page. Make changes to the Overview sections as needed.

75. Click the Save button.

76. Select Duties on the left menu bar to go to the text editor box. Make changes if needed.

77. Click the Save button.

78. Select Qualifications/Evaluation on the left menu bar to go to the text editor box. Make changes to each section as needed.

79. Click the Save button.

80. Select How to Apply on the left menu bar to go to the text editor box. Make changes to each section as needed.

81. Click the Save button.

82. Select Benefits/Other on the left menu bar to go to the Text Editor box. Make changes to each section as needed.

83. Click the Save button.

84. Select Preview on the left menu bar.

85. Check the Complete box.

86. Check the Release to USAJOBS box.

87. Click OK on the release message.

88. Select Preview on the left menu bar to refresh the page and receive the USAJOBS Control Number.

89. Click the Applicants button.

90. Click the New button.

91. Enter the SSN and name of the applicant. For the SSN use the following convention: the 6-digit VIN + 001, 002, 003, etc.

92. Click the Next button.

93. Enter the biographic and citizenship information for your applicant.

94. Click the Next button and enter the Eligibility information, such as Veteran's Preference.

95. Click the Next button to enter other information.

96. Click the Next button and respond to the occupational questionnaire. Make sure you have at least three qualified applicants.

97. Click the Next button.

98. Click the Submit My Answers button (notice the confirmation message).

99. Close the window by clicking on the X at the top right.

100. Click the Applicant button in USA Staffing, and your main Application screen will now show your applicant.

101. Create four more applicant records following the steps above.

102. Click the Referral button.

103. Click the New Request button at the bottom of the page.

104. Click the Request Information box and enter the appropriate information on this page.

105. Click the Next button to go to the Ordering Criteria page.

106. Enter the appropriate information on this page.

107. Click the Save button.

108. Click the Preview Certificate button to display the referral list with the names of the top eligible candidates.

109. Review your referral list/certificate.

110. Click the Issue button.

111. Click the Audit button.

112. Complete the Audit Code and Return Status fields. Include at least one selection form your list.

113. Click Save.

114. If everything was completed correctly the Complete box will have a check in it.

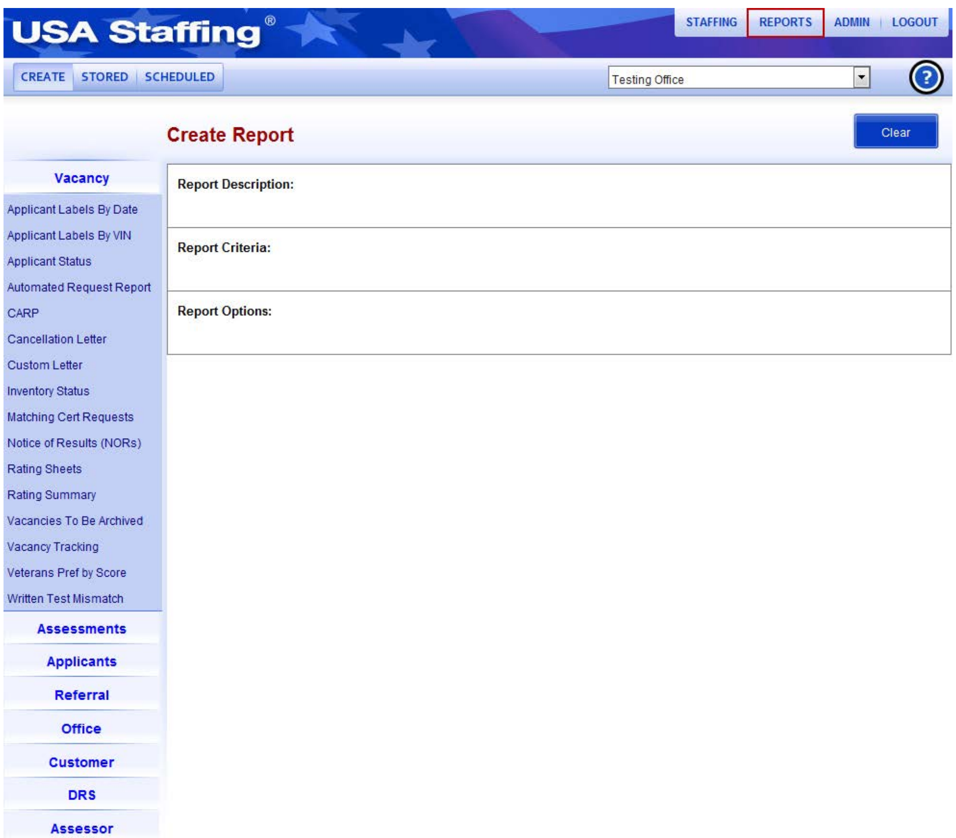
Congratulations! You have completed the process.

Using the Reports Menu

- Reports Work Area
- Retrieving Your Report
- Printing Your Report

USA Staffing provides a variety of standard reports, which include applicant correspondence. The Create Report pages allow you to generate reports or letters and preview, email them to applicants, or schedule them to be generated later.

To access the Reports work area, click the Reports button on the top navigation bar. At the top left of the page, you will see three buttons:



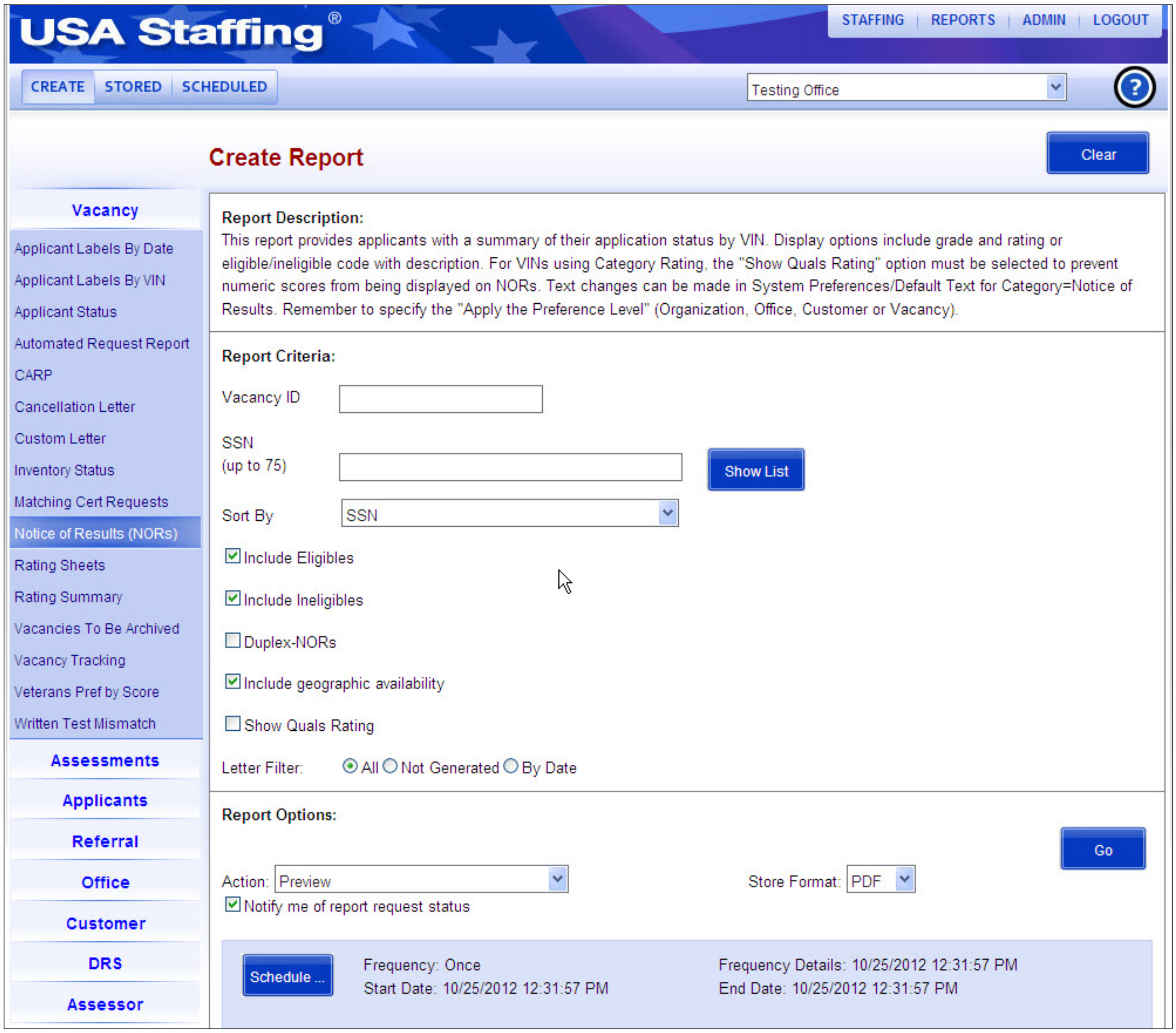
Create. The Create Report page is the default view when you access this section and is where you establish the report criteria.

Stored. The Stored Reports page displays a list of reports created and stored by users within your office. In this page, you can view, print, or save a report.

Scheduled. The Scheduled Reports page displays a list of reports created and scheduled by users within your office.

Reports Work Area

Notice of Results (NORs) Create Report page.



The items listed below contain an explanation of the elements you typically see on the Create Report page(s).

Clear. This button allows you to clear the entire report criteria at any time, including default and manually changed settings.

Report Description. This section gives a general description of the report purpose and contents.

Report Criteria. This section allows you to specify which applicant records to include. The choices you make depend upon the type of report you are generating. The available report criteria are listed below: (Only certain elements may be available on the selected report.)

Vacancy ID. Type in the VIN for which you want to generate the report.

Assessment ID. Type in the Assessment ID for which you want to generate the report.

Certificate. After entering a VIN, select Get List to display a drop-down listing of all certificates associated with that VIN. Select the certificate from the drop-down list. You may also select to have the audit information displayed by placing a check in this box.

SSN. You may specify the applicants by name that you want included in the report. This is NOT required. This was designed to allow users to select one or two individuals from the list and produce the letter for those individuals only. You can select multiple applicants, up to 75, by holding the Ctrl key on your keyboard and clicking on the appropriate names. If left blank, it will run letters for all applicants in the VIN who meet the remaining criteria defined on this page.

Get List or Show List. Click this button to display a list of available choices. This may be certificate numbers, SSNs, names, or the like.

Sort By. Select SSN or Name order for the report output.

Deselect All. This button will clear all choices in the selection box with which it is associated.

Include Eligibles. Check this box to include eligible applicants in the report. Letters will be generated for all eligibles unless the Letter Filter criteria at the bottom of the page is set to something other than “All.” See Letter Filter description below.

Include Eligibles Not Referred. Check this box to include eligible applicants who were not referred. Letters will be generated for all eligibles not referred unless the Letter Filter criteria at the bottom of the page is set to something other than “All.” See Letter Filter description below.

Include Ineligibles. Check this box to include all ineligible applicants in the report. Letters will be generated for all ineligibles unless the Letter Filter criteria at the bottom of the page is set to something other than “All.” See Letter Filter description below.

Duplex-NORs. A check in this box means that the system will instruct the printer to print Notices of Results on both sides of a sheet of paper, with the back side containing a form applicants can use to request changes to their records. This option is typically not used. It will double the size of the email and may confuse applicants.

Include geographic availability. A check in this box means that the NOR will show the locations the applicant selected when they applied.

Note: Be careful checking this box if you have multiple locations. Those locations will expand the email. If you have 100 locations and the applicant selected 50, all 50 of those locations will display in the letter, turning a one-page email into one that may be two or three pages long. Remember, applicants can always view their application materials and locations selected by going to their Application Manager account and checking the details of the application.

Show Quals Rating. Check this box to display either EL for eligible or the ineligible code assigned to the applicant records for this VIN. The ineligible code assigned is based on the codes used in the assessment, one assigned by the system, or those assigned by overriding the record.

Letter Filter. This section only appears for those reports that are intended to be emailed to applicants or displayed in their Application Manager account. The filter you set may further narrow the scope of which letters are created and may override certain aspects of the selections you entered in the Report Criteria section. For example, if you have checked Include Eligibles in the Report Criteria section and also select Not Generated in the Letter Filter box, the system produces a letter for applicants who have NOT previously received one.

The following three letter filter options are available:

- **All.** Generate a copy for all applicants who meet the report criteria. This will produce a letter for all applicants, even if they received this letter type previously.

- **Not Generated.** When this option is selected, the system produces a letter for applicants who have NOT previously received one. This report feature works well with inventories. When applicants apply, you can produce letters only for applicants who have not previously received one. This incremental approach to notifying applicants as they apply is highly recommended if the inventory is large or is expected to be.

- **By Date.** When this option is selected, you will specify a date range, either for the date any previous copy of the report was generated or for the date the application was processed.

    - Generated. A copy of the letter is prepared only for applicants who already had a copy generated between (and including) the dates you specify.

    - Processed. A copy of the report is prepared only for applicants who were processed in USA Staffing between (and including) the dates you specify.

- The **Report Options** section is where you select the report destination from the Action drop-down list.

- **Store.** Select this action to generate any of the reports that are not categorized as applicant letters; for example, Disposition Letters. This is the only option available for non-letter reports.

- **Preview.** Select this action to generate a preview of the report. We recommend you always Preview the report first so you can review the letter text before emailing it. The letters default text can be changed in Administration > Preferences > Default Text.

- **Send Email and Store Printable Letters.** Select this action to have the system send the letter to applicants who specified an email address in their application and store a printable copy of the letter for those applicants who did not provide an email address in their application. These reports will be separated into two report types, Emailed and Print, on the Stored Reports page. A copy of the Emailed letters is automatically saved in the Applicants -

Report Information Page and their Application Manager account. Once sent, Emailed letters cannot be removed from Application Manager or the applicant's record.

- **Schedule.** Click this button to have the report generated at a later date and time. The scheduled report will be stored /previewed, or emailed based on the option selected from the Action drop-down list using the scheduling parameters indicated.

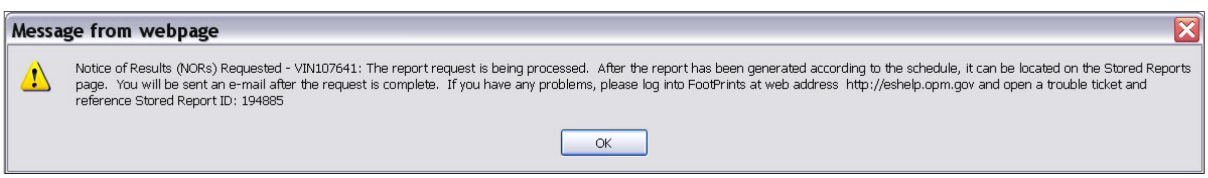
Store Format. The options available are PDF or HTML. This determines whether the report is generated as a PDF file for viewing or printing using Adobe or in HTML format. PDF is the default. If you want the report content to be fixed so it cannot be changed, use PDF. PDF format is, essentially, a read-only copy of the original document that cannot be modified. Use this option unless you have a valid exception for doing so. The full version of Adobe Acrobat is required to modify a PDF file, and even then, only very limited editing can occur. However, users with the full Adobe Acrobat can add annotations, bookmarks, and highlights.

Use HTML when you want to be able to edit the content of the report in MS Word or some other editor. If the report is intended for a person who needs a 508-compliant report, they may prefer HTML over PDF.

- **Notify me of report request status.** Check this box to have the system email you when the report request is received and again once it is complete.

Go. Click this button after you have made all report criteria and report options selections, and are ready to generate the report. A confirmation message will display. Make a note of the Stored Report ID so that you can easily identify it on the Stored Reports page. Non-scheduled reports will appear on the Stored Reports page with a PENDING status once you click Go. Scheduled reports will not appear on the Stored Reports page until they are actually running. Once the report has started, the status is set to RUNNING.

After you click the Go button, the following events take place:



- A popup window will give you information about the report you have requested. Make note of the Stored Report ID so you can easily identify it on the Stored Report list later. Click OK to forward the request to the report server.

- The report server will send you an email to let you know it has received the request and it is being processed, unless you have unchecked the box for Email user when request is created and completed.

- The report server will send you a second email when the report is ready and waiting in Stored Reports, unless you unchecked the box for Email user when request is created and completed.

Note: For a complete list of reports, select the Office section, then List of Reports and Run Report. The request will run and be placed in the Stored Reports area. You may print a copy of this report for future reference.

Stored. Click this button to change to the Stored Reports mode, and then click the specific report Type to see the content of the requested report. The Stored Reports table displays all reports associated with that report. For instance, if you run NORs, the NOR letter type would need to be selected on the Create Report view. Once you select the report, the Stored Reports page displays all reports under that report.

The following buttons display on the top right area of the Stored Reports page:

- **Send.** This button allows you to generate the selected Preview report type without the need to re-create the report if the previewed report is correct. To select a report, click on the row of the report. A black arrow appears to indicate the selected row. When this option is selected, the system sends the letter to applicants who specified an email address in their application and stores a printable copy of the letter for those applicants who did not provide an email address in their application. These reports will be separated into two report types, Emailed and Print, on the Stored Reports page.

- **Restart.** This button allows you to resume a letter report generated with the Send Email and Store Printable Letters Action using the same report criteria and options. You can click the row of a report in FAILED - RESTART Status and click Restart. This will start over the request with the same Stored Report ID, Criteria, and Options, but will not process (send/print) letters already generated thus preventing duplicate letters being emailed to applicants when errors occur.

- **Delete.** This button allows you to delete the selected report. To select a report, click on it. A black arrow appears to indicate the selected row.

- **Refresh.** This button allows you to reload the Stored Reports page.

Scheduled. Click this button to change to the Scheduled Reports mode, and then click the specific report title to see the list of scheduled reports.

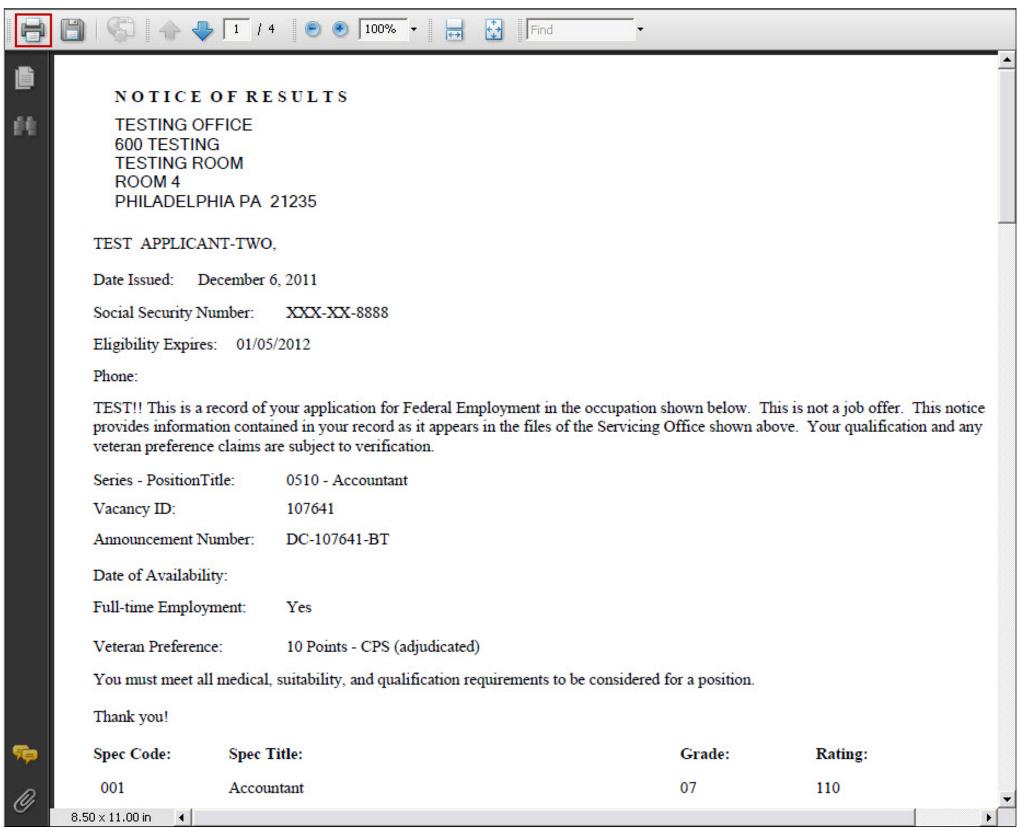
Retrieving Your Report

To locate and retrieve your report, follow these steps:

- Go to the Reports work area by clicking the Reports button on the top navigation bar.
- Click the Stored button at the top of the page.
- Select the report type from the left menu bar. Remember, the subject line of the email you received will indicate what type of report it is.

- The Stored Reports list contains all stored reports of that type generated under your Office.
- Select the report under the expanded section. If you previously checked the Notify me of report request status box, the subject line of the email you received will indicate the report type. The Stored Reports page is specific to the selected report and contains a list of reports generated under your office. You can switch to see all reports generated under your office or view just the reports you have generated (default view), by clicking Show All Reports or Show My Reports respectively.
- Use the following information to locate your report on the list: Stored Report ID, Criteria, or Report Date.
- Click the link located under the Type column to open the report. The report will open in a separate Adobe preview window where you can view, print, or save the report. A PDF file is created for all report types: Stored, Preview, Print, and Emailed. Keep in mind these PDF files can be printed or saved. A copy of the PDF file can be saved to a hard drive. Some agencies use this method to keep a record of the outbound correspondence.

Sample Notice of Results:



NOTICE OF RESULTS

TESTING OFFICE
600 TESTING
TESTING ROOM
ROOM 4
PHILADELPHIA PA 21235

TEST APPLICANT-TWO,

Date Issued: December 6, 2011

Social Security Number: XXX-XX-8888

Eligibility Expires: 01/05/2012

Phone:

TEST!! This is a record of your application for Federal Employment in the occupation shown below. This is not a job offer. This notice provides information contained in your record as it appears in the files of the Servicing Office shown above. Your qualification and any veteran preference claims are subject to verification.

Series - PositionTitle: 0510 - Accountant

Vacancy ID: 107641

Announcement Number: DC-107641-BT

Date of Availability:

Full-time Employment: Yes

Veteran Preference: 10 Points - CPS (adjudicated)

You must meet all medical, suitability, and qualification requirements to be considered for a position.

Thank you!

Spec Code:	Spec Title:	Grade:	Rating:
001	Accountant	07	110

Printing Your Report

To print your report, follow these steps:

- Complete the steps outlined in the section titled Retrieving Your Report in the previous page.
- Use the Print feature of either your browser or Adobe Acrobat. You can opt to print select pages, rather than the full report, on the printer dialog box.

Check Your Skills – Create and Print a Report

Take 15 minutes to get familiar with using the Reports menu and review the process.

Create a report by doing the following:

1. Click the Reports button on the top navigation bar.
2. Click the Office button on the left menu bar.
3. Select List of Reports on the left menu bar.
4. Click the Go button. You will get a message that the report is being processed.
5. Click OK.
6. Click the Stored button at the top of the page. You will see the list of reports.
7. To look at a report, click the Stored link under the Type column. The report will come up as a PDF file.
8. If you have access to a printer, print the report.
9. Review the document you printed and identify which report(s) you believe you will most need to generate.

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