Section 3

Administration

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SECTION 3 – ADMINISTRATION

Administration Overview

- Template Libraries
- Maintenance
- Preferences
- Data Retrieval

The Administration area of USA Staffing contains the following sections, each of which enables system configurations to meet the agency's needs:

- **Template Libraries.** Basic templates are provided at the Global level. These templates contain basic information and should be viewed as a starting point when developing Organization or Office level templates to meet your agency's needs. Global templates can be copied to the Organization or Office levels, as appropriate, and then refined further to meet the needs of your organization. OAs and others with the appropriate permission profile can copy and modify these templates.
- **Maintenance.** This work area maintains records related to customers, users, offices, permission profiles, and workgroups.
- **Preferences.** You can customize system-configuration options, applicant correspondence default text, certificates, applicant flags, NOR messages, and rating codes (designated as such by the OA or other authorized users).
- **Data Retrieval.** This feature allows you to import information, typically ratings for a customized assessment process, or export applicant information in the form of a comma-separated variable (.csv) file that can be easily converted to a spreadsheet format.

Many of the Administration settings are defaulted and apply across the Organization and/or Office levels. When appropriate, these defaults can be changed for the office, specific customers, vacancies, or, in some cases, at the certificate level.

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Template Libraries

- Announcements
- Removing Sub-Items
- Overview in the Announcement Template
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- How to Apply in the Announcement Template
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The Template Libraries section is a holding area that stores the content of your job announcements and assessment questionnaires. Templates are reusable sets of content for announcements, questionnaires, and default scales. The creation and maintenance of templates is independent of any VIN. When a VIN and an announcement are developed, the system will prompt you to select the appropriate template from the Template Libraries. Announcement templates are often set up to accommodate Delegated Examining Unit (DEU) or Merit Promotion procedures, or perhaps both procedures through one announcement. In some cases, series-specific or specialty area templates may be developed. In addition to providing consistency across multiple announcements, templates save the user time and effort. Please note that templates are not associated with any VIN until the user selects that template in the Staffing area.

There are three levels of templates. These levels are restricted to those who have appropriate permission levels. Permission levels are a way of controlling who can access templates to make changes. The template levels available in USA Staffing are:

- **Global.** The USA Staffing Program Office maintains templates at this level and they are available to all users. These are not agency specific and are generic in content and format. These templates can be copied to the Organization or Office level and customized as needed by the agency.

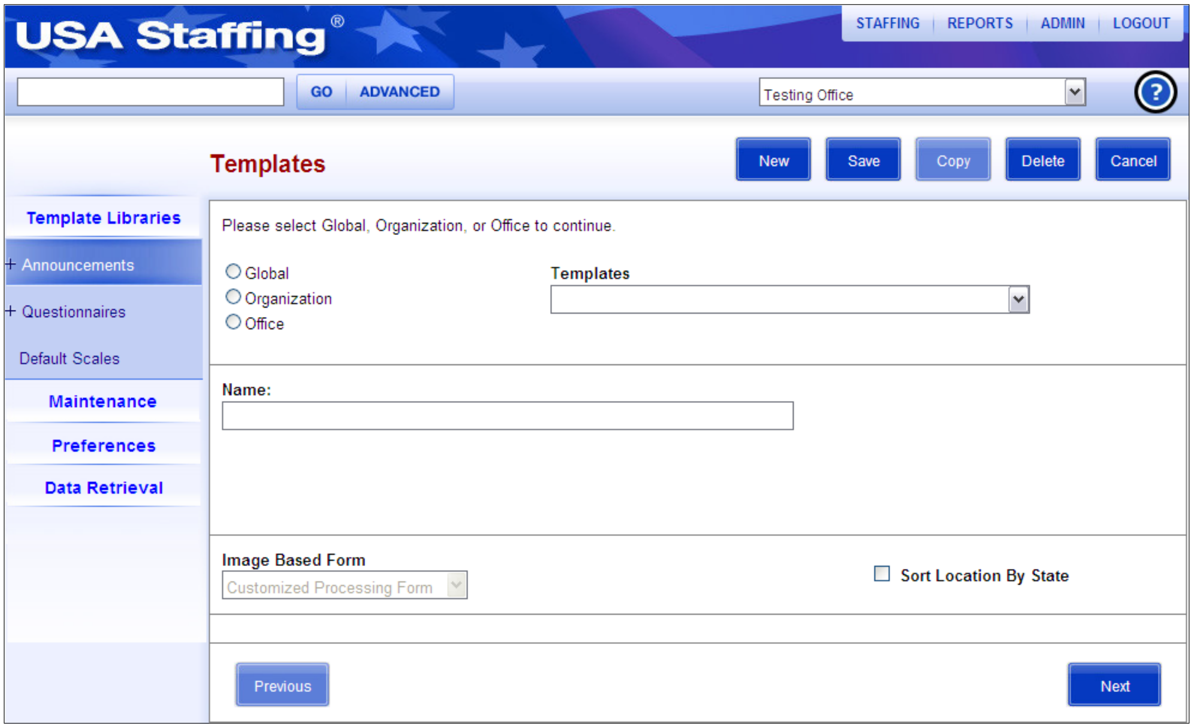
- **Organization.** Organization Administrators can copy from the Global level and produce content (announcements and questionnaires) that can be used by the various offices within the organization. This Organization layer allows agencies to create and organize the announcement and questionnaire content specific to their needs. This approach saves time and effort and allows the agency to provide consistent or similar content across the various components or offices using the system. Users with an Organization Administrator profile and USA Staffing Program Office support personnel can make alterations at this level.

- **Office.** OAs and/or users with the appropriate permission profile can create and maintain templates at this level. Office members without appropriate permission profiles can see these templates but cannot modify them in the template library.

  Note: If you have access to more than one USA Staffing Office, you may see different Office level templates for each one. Office level templates cannot be copied directly from one office to another. Remember, the Organization level allows for sharing of templates across offices within the same organization. To share an Office level template with another office, it would need to be moved up to the Organization level and saved. Once saved at the Organization level, it can be copied from there and saved to the other office.

When standard users create a job announcement, they can select announcement and/or questionnaire templates, and attach these to the VIN. Standard users can then modify the templates linked to the VIN and the original template will remain intact.

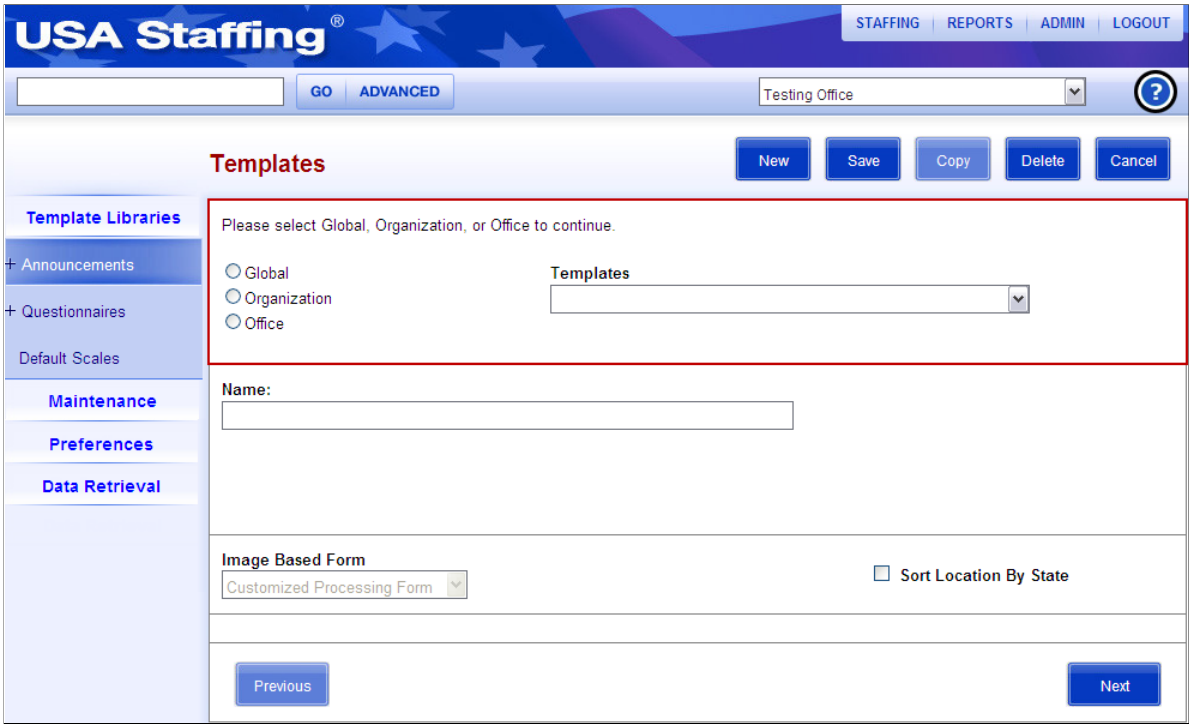
Announcements



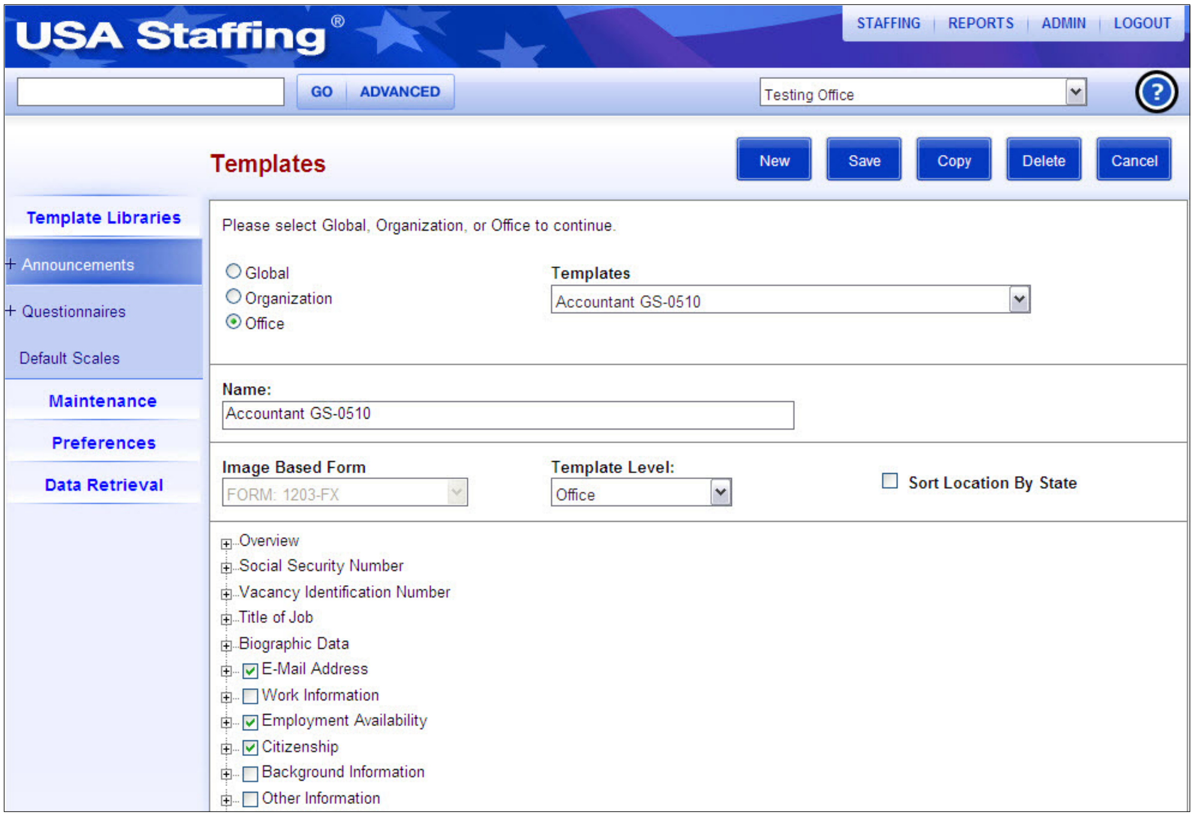
To access the Announcement Templates, do the following:

- Select the Administration button on the top navigation bar.
- Click the Template Libraries button on the left menu bar.
- Select Announcements to access the Announcements Templates page.

- Select one of the radio buttons labeled Global, Organization, and Office, and the system will display all templates available at the selected level in the Templates drop-down list.



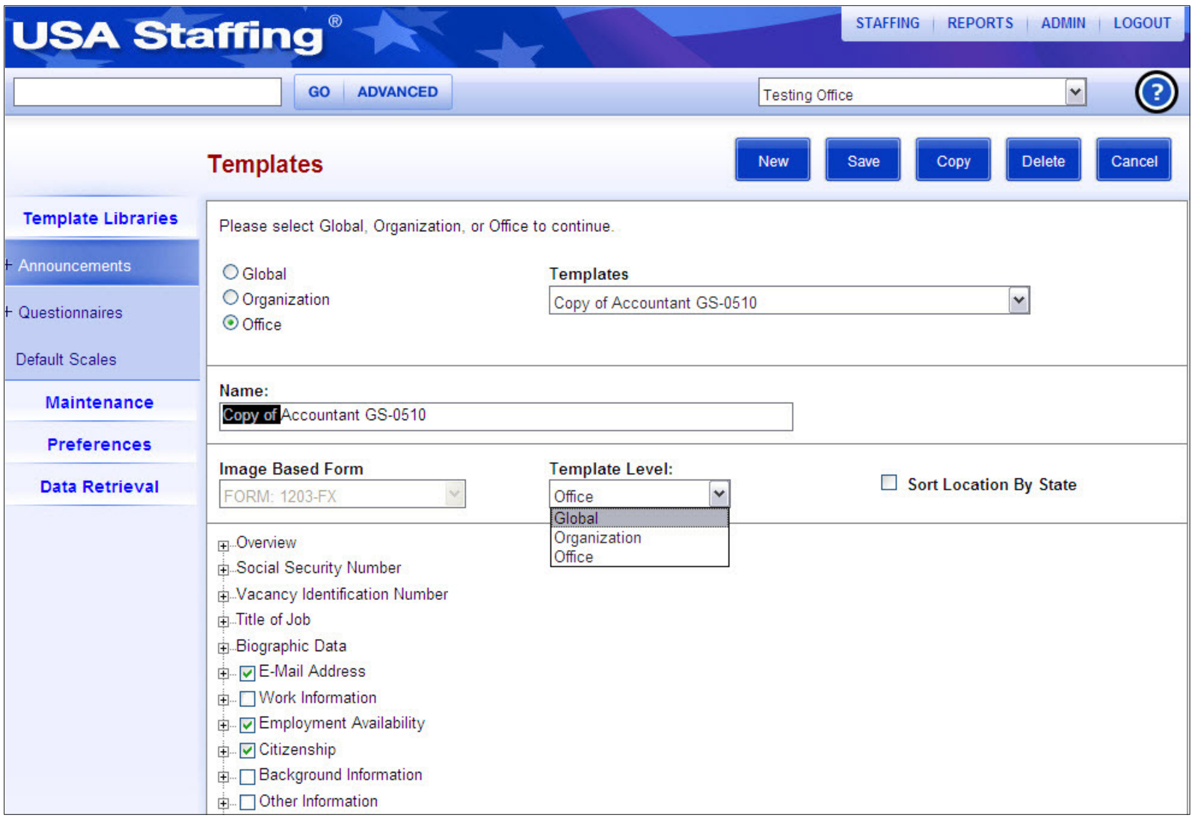
- Select a template to view and the page will load and display all of the data fields associated with that template. You can review announcement template content by selecting the plus sign next to Announcements on the left menu bar. A new template can be created based on this template.



- Click the Copy button to produce a copy of the previous template.

HOT TIP! If you open a template, make changes to it, and click the Save button, you will be changing the original template, not creating a new one, even if you change the name. If you want to create a new template from an existing template, first open the template and make a copy of it, name it, and save. Then make modifications to create a new template.

- The name of the new template will display as "Copy of [the name of the selected template]" in the Name field. Highlight the Name field and change the template name to something more suitable. Make sure the name is unique and provides other users with enough information to ensure the template is utilized appropriately.

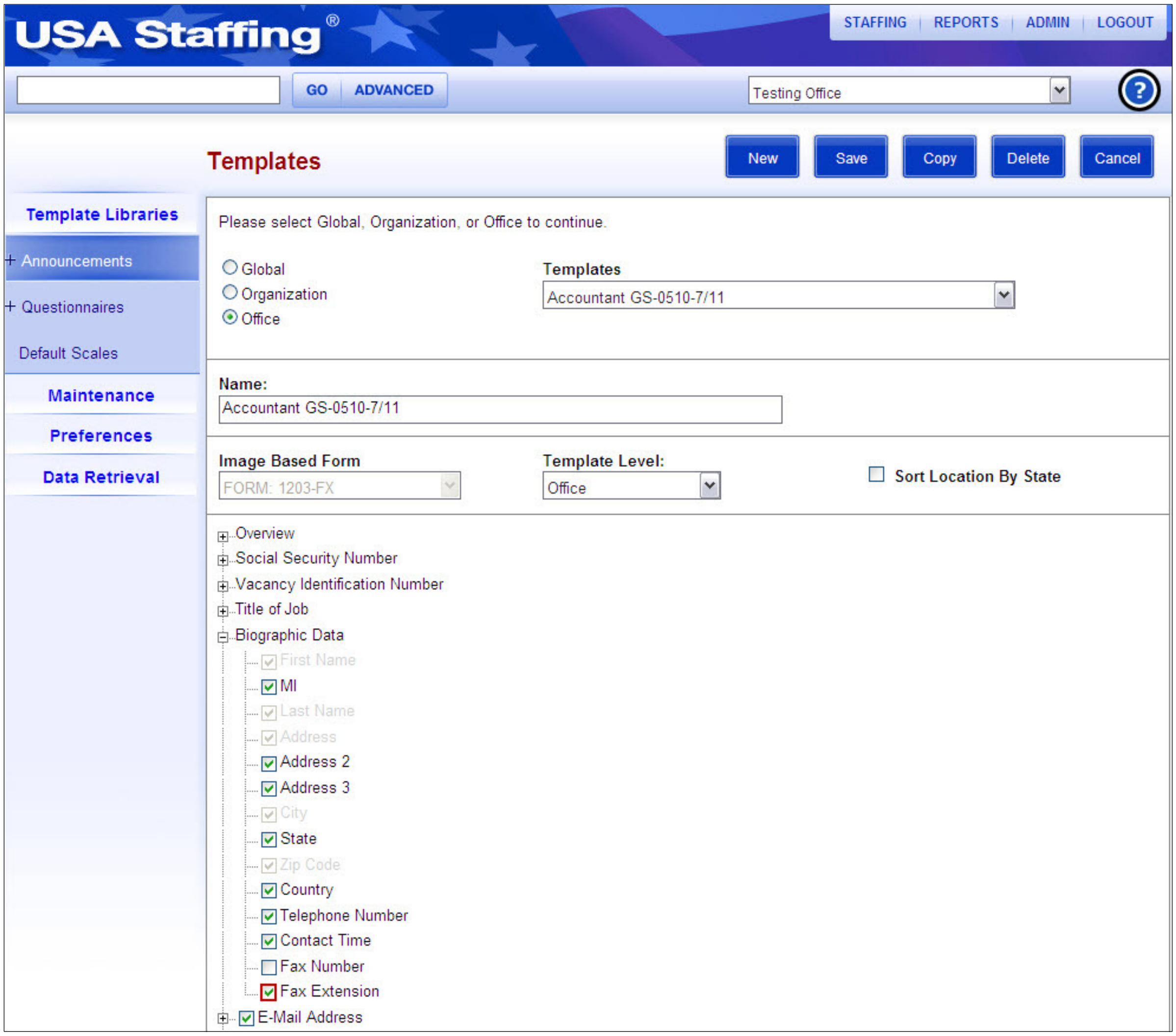


The **Template Level** defaults to Office. Those with appropriate permission can change this to the Organization level.

If the **Sort Location By State** box is checked, duty locations will be arranged alphabetically by state when they appear in the job announcement and the online questionnaire. If this box is not checked, locations appear in location code (numeric) order, making it difficult for applicants to sort through multiple locations.

Once a template is selected the bottom half of the page will list the headings of all the main items and sub-items. You can control which items appear in the online application. The copied version may already have the appropriate fields selected and changes may not be necessary. To include an item or sub-item, check the box to its left to add it to the questionnaire. Note that a sub-item will not display on the questionnaire if the item it is under is unchecked.

To remove an item or sub-items, do the following:



Removing Items

- Click the box to the left to remove the checkmark for that item. The item will be removed from the questionnaire along with all of its sub-items.

Removing Sub-Items

- Click the plus sign to the left of an item to expand it to show the associated sub-items.
- Choose the sub-item to remove/suppress by clicking on the checkmark next to it.
- For example, click the plus sign next to Biographic Information to display the sub-items. Scroll down and remove the checkmarks beside Fax Number and Fax Extension, then save. Once they have been unchecked, these fields will not display in the online questionnaire.

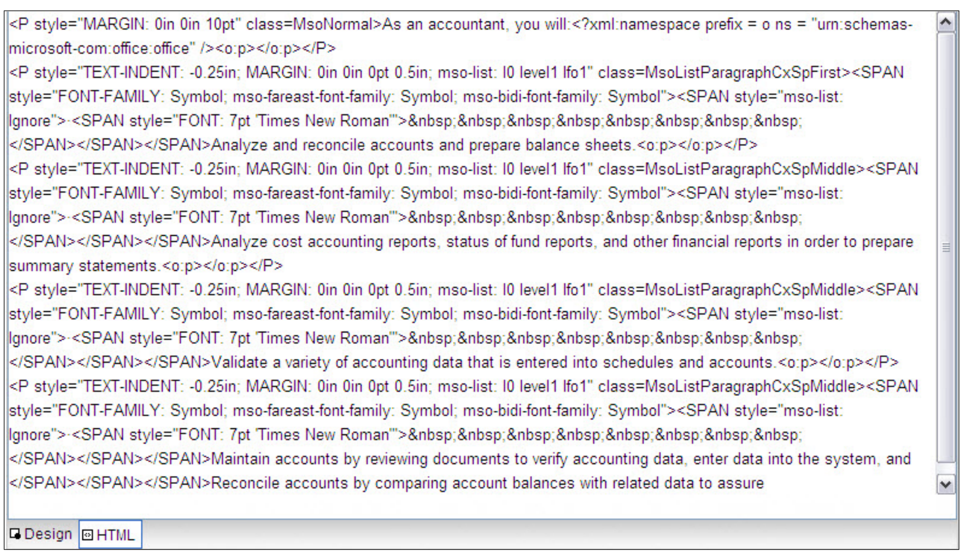
- Click the Next button when you are finished with the Templates page. This will save your work and take you to the Overview page. It will also expand the Announcement menu on the left menu bar so that you can select other pages.

All remaining pages of the Announcement area work the same way as the corresponding pages in the Staffing area, except for Preview. The Preview function in the Templates area will not link to USAJOBS. The Preview page will display the text of your job announcement but will not include vacancy-specific information. Remember, templates are not associated with any VIN at this point. A template must be selected in the Staffing area and released to the USAJOBS Web site before the Preview function will work.

Note: The Overview, Duties, Qualifications, How to Apply, and Benefits/Other sections of the template correspond directly with these same areas on USAJOBS. The information entered on the various pages and sub-sections will appear exactly as it is entered on the template. Please ensure your text is formatted properly, is grammatically correct, and does not contain excess HTML code.

Note: Programming experience is not necessary to understand the use of HTML code in USA Staffing. This coding method is used to format announcement templates as well as announcement-specific content developed in the Staffing/Administration areas.

When cutting and pasting text from a Word document, you may have problems with the formatting or possibly exceed the number of characters permitted in that section of the announcement due to excess HTML coding. Character limits are based on the total number of characters contained in that field, not on the actual word count. To view all characters in a given text box; select the HTML view at the bottom of the text box. (See example below.) This will display the text and the HTML code. USA Staffing uses HTML coding to present the announcement text properly in the USAJOBS on-line environment. If the HTML code is not correct, the announcement may not display properly.



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<P style="MARGIN: 0in 0in 10pt" class=MsoNormal>As an accountant, you will:<?xml:namespace prefix = o ns = "urn:schemas-microsoft-com:office:office" /><o:p></o:p></P>
<P style="TEXT-INDENT: -0.25in; MARGIN: 0in 0in 0pt 0.5in; mso-list: l0 level1 lfo1" class=MsoListParagraphCxSpFirst><SPAN style="FONT-FAMILY: Symbol; mso-fareast-font-family: Symbol; mso-bidi-font-family: Symbol"><SPAN style="mso-list: Ignore">·<SPAN style="FONT: 7pt 'Times New Roman'">        
</SPAN></SPAN></SPAN>Analyze and reconcile accounts and prepare balance sheets.<o:p></o:p></P>
<P style="TEXT-INDENT: -0.25in; MARGIN: 0in 0in 0pt 0.5in; mso-list: l0 level1 lfo1" class=MsoListParagraphCxSpMiddle><SPAN style="FONT-FAMILY: Symbol; mso-fareast-font-family: Symbol; mso-bidi-font-family: Symbol"><SPAN style="mso-list: Ignore">·<SPAN style="FONT: 7pt 'Times New Roman'">        
</SPAN></SPAN></SPAN>Analyze cost accounting reports, status of fund reports, and other financial reports in order to prepare summary statements.<o:p></o:p></P>
<P style="TEXT-INDENT: -0.25in; MARGIN: 0in 0in 0pt 0.5in; mso-list: l0 level1 lfo1" class=MsoListParagraphCxSpMiddle><SPAN style="FONT-FAMILY: Symbol; mso-fareast-font-family: Symbol; mso-bidi-font-family: Symbol"><SPAN style="mso-list: Ignore">·<SPAN style="FONT: 7pt 'Times New Roman'">        
</SPAN></SPAN></SPAN>Validate a variety of accounting data that is entered into schedules and accounts.<o:p></o:p></P>
<P style="TEXT-INDENT: -0.25in; MARGIN: 0in 0in 0pt 0.5in; mso-list: l0 level1 lfo1" class=MsoListParagraphCxSpMiddle><SPAN style="FONT-FAMILY: Symbol; mso-fareast-font-family: Symbol; mso-bidi-font-family: Symbol"><SPAN style="mso-list: Ignore">·<SPAN style="FONT: 7pt 'Times New Roman'">        
</SPAN></SPAN></SPAN>Maintain accounts by reviewing documents to verify accounting data, enter data into the system, and
</SPAN></SPAN></SPAN>Reconcile accounts by comparing account balances with related data to assure
```

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

- When cutting and pasting from a Word document, use the Clean Word Formatting button located above the text box. (See example below.) This feature will clean most of the imported (copied and pasted) HTML code within the text.

- Avoid copying text from an existing announcement posted online or from an online source and then pasting directly into your announcement. This will frequently 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 and allows you to format the copied text directly in USA Staffing.

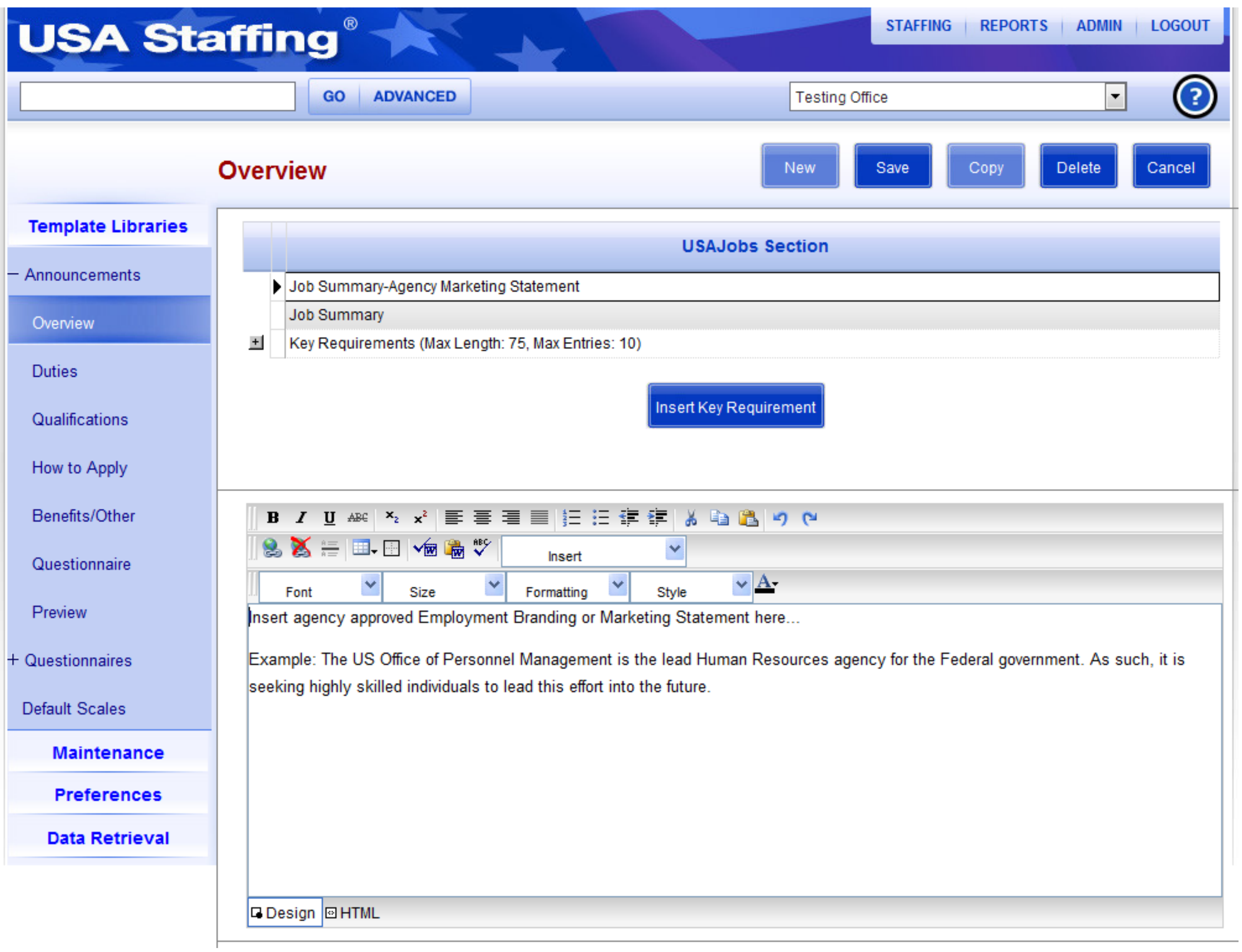
- If working with large amounts of text, you could also paste it into Notepad or Word and save it as a plain text file; saving it as a plain text document will strip most of the excess code. Then copy and paste the plain text version into the text box in USA Staffing.

- Please ensure you are as consistent as possible with your font choices. Remember when you cut and paste, the font style of the original document will carry over into the announcement.

If your template format is Arial and you cut and paste text in Times New 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. Templates with various fonts and/or excess HTML code will not look professional and will require each user who pulls the template into their vacancy to make modifications. Please ensure any templates developed are free of excess HTML and are consistent in formatting, font styles, and sizes. The USAJOBS Web site's default font is Verdana.

Overview in the Announcement Template

The Overview page contains three sections as described below. Collectively these three sections or fields are the Overview page of the USAJOBS announcement. This is where you input and manage the information that will appear in the Overview section of your announcement when published to USAJOBS.



The Overview template page contains three sections:

- **Job Summary–Agency Marketing Statement** (not required). This statement is limited to 1,500 characters and briefly markets your agency to potential applicants who read your announcement. This section does not have its own heading on USAJOBS but appears as the first paragraph in the Job Summary section. If you leave this item blank, USAJOBS will move up the Job Summary text so that it does not appear that text is missing.

- **Job Summary** (required). This section permits up to 2,500 characters and is intended to provide applicants with a general idea of what the job is about, so they can decide whether to read the job announcement further.

- **Key Requirements** (required). You can modify, add, or delete up to ten key requirements. They appear in bullet form at the bottom of the Overview page.

To work on any of these three sections, select the name from the table at the top of the page. The selected section will have a black arrowhead in the column to the left. The corresponding text box will appear on the lower portion of the page. Place the cursor in the text box and enter the information.

Selecting Key Requirements will refresh the page to display current key requirements and provide a button at the bottom the page to add or insert a new requirement. Existing key requirements can also be modified.
To add a key requirement, do the following:

- Open Key Requirements by selecting the plus sign.

- Click the Insert Key Requirement button and a blank row will appear.

- Type the new key requirement.

- Click the Save button.

  Note: Check your spelling and grammar; there is no spell check capability in this field.

To modify a key requirement, do the following:

- Click the plus sign to expand the item view.

- Select the row you want to modify.

- Type your changes. Remember: These lines have a 75-character limit.

- Click the Save button.

To delete a key requirement, do the following:

- Click the plus sign to expand the item view.

- Select the row of the requirement you want to delete.
- Click the Delete button at the top of the page.
- Click the Save button.

Duties in the Announcement Template

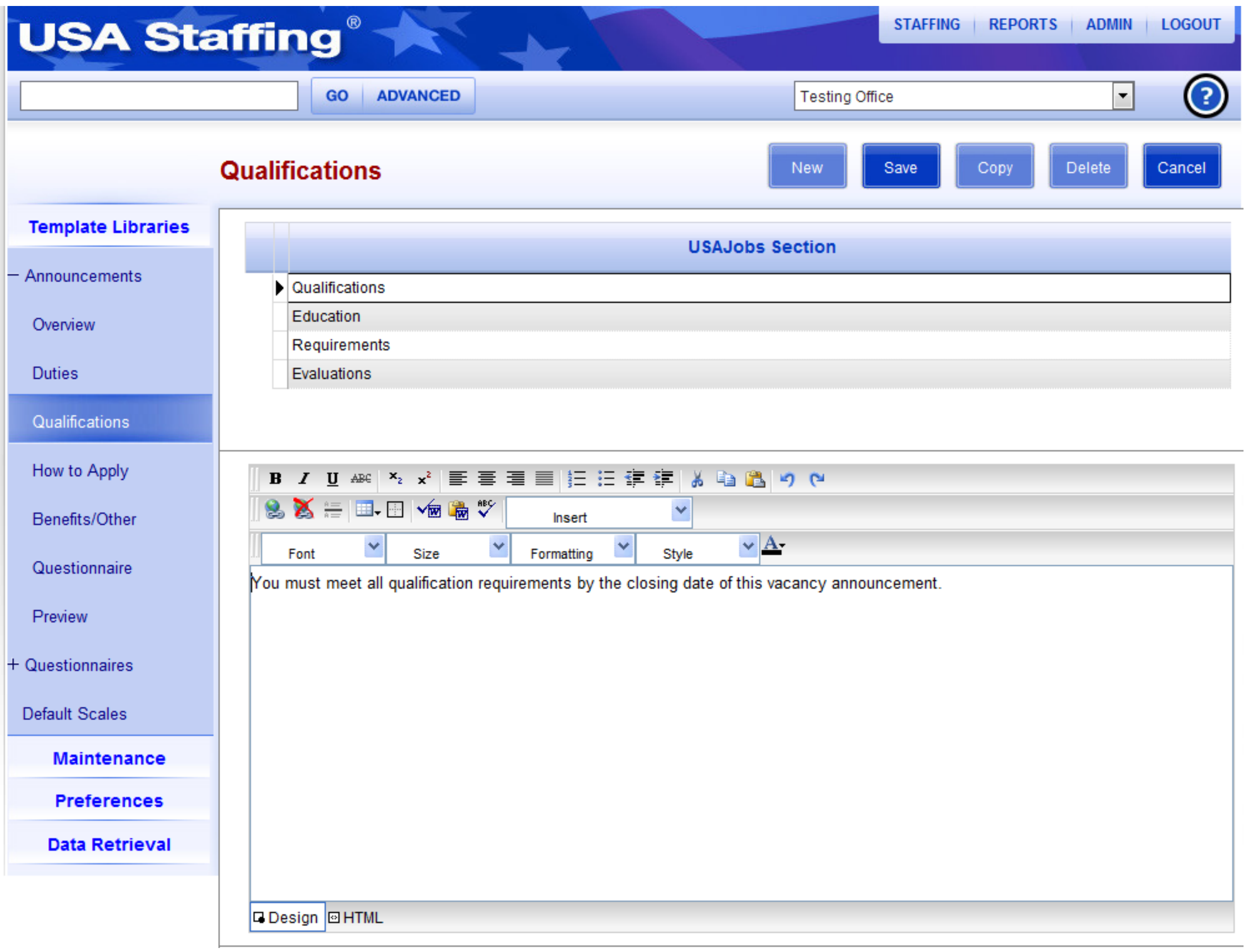
The Duties page is where you manage the text that will appear in this part of the job announcement when published to USAJOBS.

To add text in the Duties page, do the following:

- The template may have placeholder text. This placeholder text is typically in red or in brackets and is not intended to remain in your announcement. This serves as your reminder to replace this text with the duties of the position you are announcing.
- Highlight and delete the text.
- Type your own text.
- Click the Save button.

Qualifications in the Announcement Template

The Qualifications page is where you manage the text that will appear in this part of the job announcement when published to USAJOBS. There are four sections on this page: Qualifications, Education, Requirements, and Evaluations. Collectively these four sections or fields are the Qualifications page of the USAJOBS announcement.



To add or modify content for these sections, do the following:

- Click the name of a section in the table at the top of the page. The selected section will have a black arrow in the column to the left. For example, in the screen shot above, the selected row is Qualifications . This field holds a maximum of 8,000 characters.
- Highlight the text, delete it and type in your text.
- Click the Save button.
- Repeat these steps for the remaining sections. The Education section is not a required field for USAJOBS. This section can be left blank.

How to Apply in the Announcement Template

The How to Apply page is where you manage the text that will appear in this part of the job announcement when published to USAJOBS. There are three sections on this page: How to Apply, Required Documents, and What to Expect Next. Collectively these three sections or fields are the How to Apply page of the USAJOBS announcement.

To add or modify content for these sections, do the following:

- Select the section name on which you want to work in the table at the top of the page. The section selected has a black arrow in the column to the left. For example, in the image above, the How to Apply section is selected.
- Type your text in the text box on the bottom half of the page.
- Click the Save button.
- Repeat these steps for the remaining sections.

Note: It is very important that the How to Apply section provides accurate instructions for the applicants. The USA Staffing Program Office has provided How to Apply instructions in all of the Global templates. The Required Documents section should outline the document types selected on the Supporting Documents page of the Vacancy. The instructions should describe the document types necessary for applicants to apply successfully, i.e., who should submit transcripts, SF-50s, or Veterans documentation.

Benefits/Other in the Announcement Template

The Benefits and Other Information page is where you manage the text that will appear in this part of the job announcement when published to USAJOBS. There are two parts, Benefits and Other Information. Collectively these two sections are the Benefits and Other Information page of the USAJOBS announcement.

To add or modify content for these sections, do the following:

- Click the section name on which you want to work, in the table, at the top of the page. The section selected has a black arrow in the column to the left. For example, in the image, the Benefits section is selected.

- Type your text in the text box on the bottom half of the page.
- Click the Save button.
- Repeat these steps for the remaining section.

TAGs

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

Throughout the various sections of the announcement, each text box has editing tools that can help you format the sections. The Insert drop-down list includes TAGs that can be used to incorporate VIN-specific information within the announcement template.

TAG items, such as Vacancy ID and Closing Date, represent data elements that the system can automatically populate with VIN-specific information. Below are some examples of commonly used TAGs:

- **TAG: Announcement Number.** When this TAG is inserted in the announcement template, the system will show the announcement number entered on the Announcement Information page for any VIN that uses this template.
- **TAG: Vacancy ID.** When this TAG is inserted, the system will show the six-digit VIN associated with the job announcement that uses this template.
- **TAG: Link to Full Questionnaire.** When this TAG is inserted in the How To Apply section it will appear as a link in your announcement that, when clicked, will display the full text of the assessment questionnaire. This is useful for applicants who may want to review the questionnaire content before applying, but is primarily directed toward those applicants who want to complete the 1203-FX Form C and fax their responses rather than apply online.
- **TAG: Closing Date.** When this TAG is inserted, the closing date will appear in the announcement. When you extend an announcement and click the Update USAJOBS button, that change will reflect the new closing date.

The available TAGs are displayed in the screen shot on the next page.

To insert a TAG, do the following:

- In the text box, place your cursor where you want the TAG to appear.
- Use the Insert drop-down list to select the TAG you want to insert.
- When inserted into templates, the notation is TAG: Field Name. For example, TAG: VacancyID or TAG: Closing Date will display after you insert them. At this point, they do not contain any data, because they are not associated with a VIN. Once the template is used for an announcement, these fields will populate with the appropriate data for that VIN and/or job announcement.

To delete a TAG, do the following:

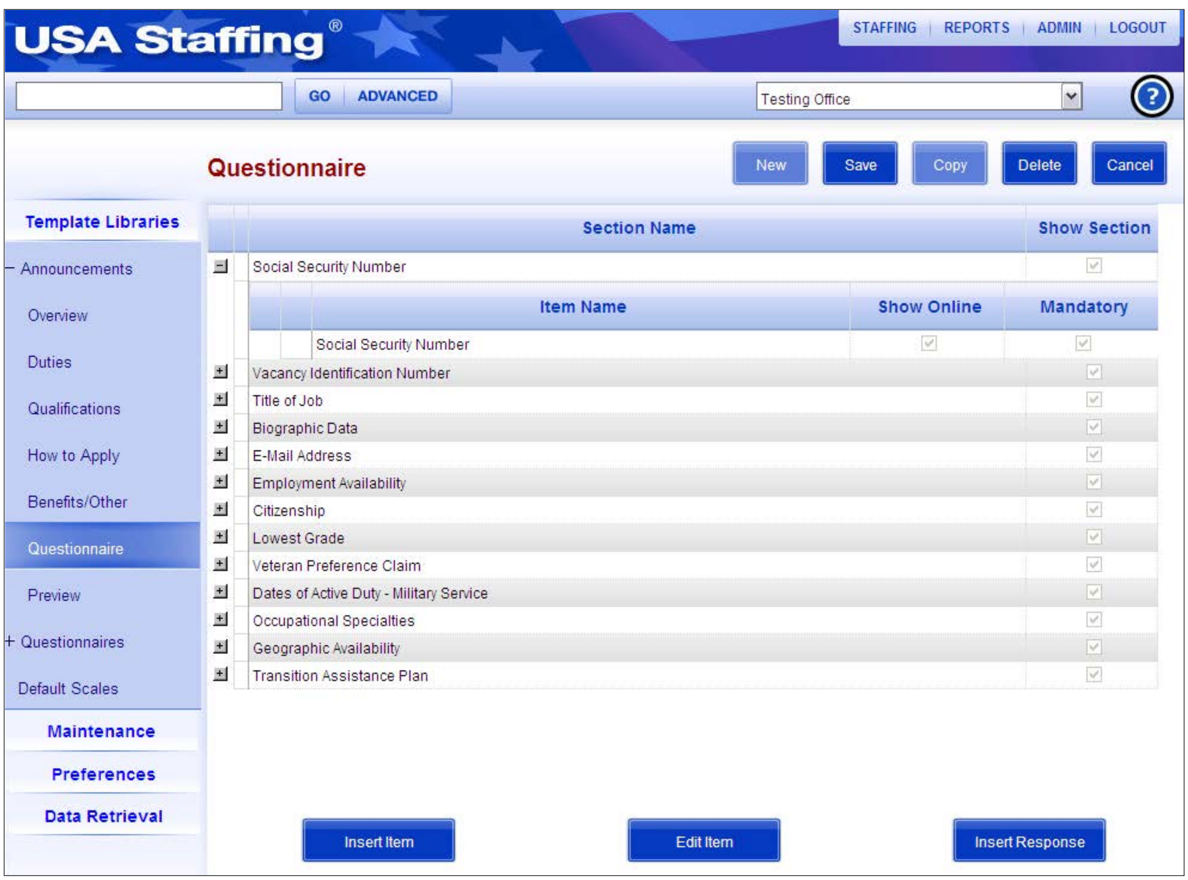
- In the text box select the TAG.
- Press the Delete key on your keyboard.

Questionnaire in the Announcement Template

The items listed on the Questionnaire page are a combination of mandatory fields and the items checked on the Announcement Templates page under Template Libraries. On this page, you can add or modify instructions that appear before these items, and, in some cases, input questions and responses that will appear in the questionnaire. If the data item is not selected on the Templates page, it will not appear on the Questionnaire page.

These data fields will determine the information collected from the applicants when they apply. This information typically captures basic biographic information, citizenship status, minimum grade acceptable, locations, vet preference, etc.

Note: The information collected in your questionnaire creates the applicant record within USA Staffing. This information is used to sort and order applicant names in the referral area when you produce certificates.



These are your options on the Announcement Template Questionnaire page:

- **Items and Responses.** To see the items and responses associated with a section, select the plus sign to the left of that section. The image on the next page shows that the Citizenship row has been expanded to reveal the item. This item has been further expanded to show the response choices that are offered to the applicant.

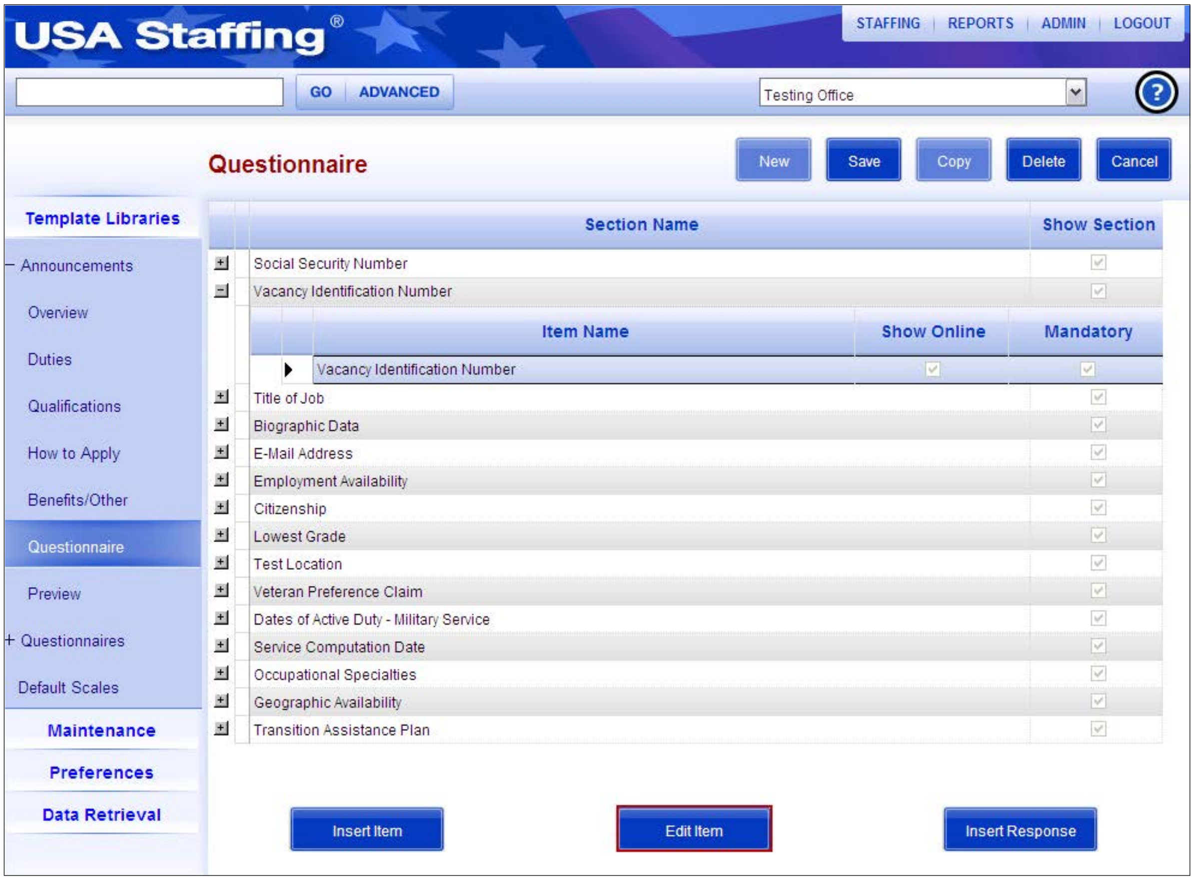
- **Show Section.** A check in the Show Section box (far right column) means the section and any selected sub-sections will appear in the online questionnaire. If the section is mandatory or selected on the Templates page, this defaults to checked. To remove an optional section, go back to the Templates page and remove the checkmark for that section.

- **Show Online.** The Show Online check box means that item will appear in the online questionnaire. If the item is mandatory or selected on the Templates page, this defaults to checked. To remove an optional item, go back to the Templates page and uncheck that item.

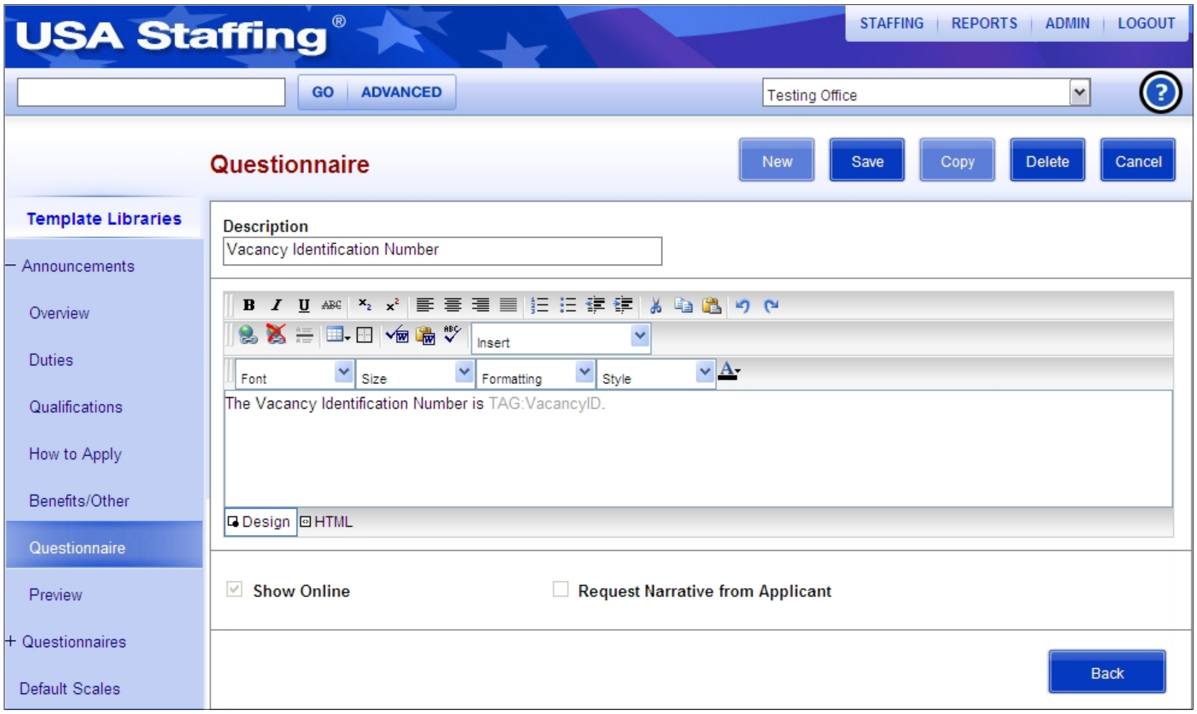
- **Mandatory.** A check in the Mandatory box means that the applicant must provide a response to that item in order to move to the next page of the online questionnaire. If an applicant tries to proceed without providing a response to the mandatory item(s), the system will not move to the next page and will highlight that item to indicate a response is required.

  Note: This control has no effect if the applicant submits a paper application 1203-FX (Form C) via fax.

- **Insert Item.** Items typically do not need to be inserted in the templates. When the item is checked on the Templates page, the field comes with the item already loaded. You may want to change the name of the item or add instructions, questions, or responses to that item.



- **Edit Item.** To edit an item follow these steps:
  - Select the plus sign next to the Section Name you want to edit. The example above shows the Vacancy Identification Number section opened.
  - Select the plus sign next to the Item Name and then click anywhere in that row. An arrow to the left of the name shows the Item selected.
  - Click the Edit Item button at the bottom of the page. The Item Editor page will appear.



- Insert the Vacancy ID TAG.
- Click the Save button.

- **Insert Response.** For questions you create that are not a standard part of the Form 1203-FX template, you can create multiple response options. To do this, follow these steps:
  - Select the row of the item to which a response is to be added. An arrowhead will appear to the left of the name to show that the item has been selected.
  - Click the Insert Response button. This will create a new response row below the item.
  - Select the Code cell to activate it and type in the code you want to assign. The code must be the same number of characters as the 1203-FX (Form C). Please review the form prior to assigning a code for that item.
  - Select the Response cell to activate it and type in the response value you want to assign. The response text is what the applicant will see when completing the application.

Questions and Responses You Can Modify. The following items allow you to add to the questionnaire responses that permit the user to check one or more response boxes:

- Languages
- Miscellaneous Information
- Special Knowledge

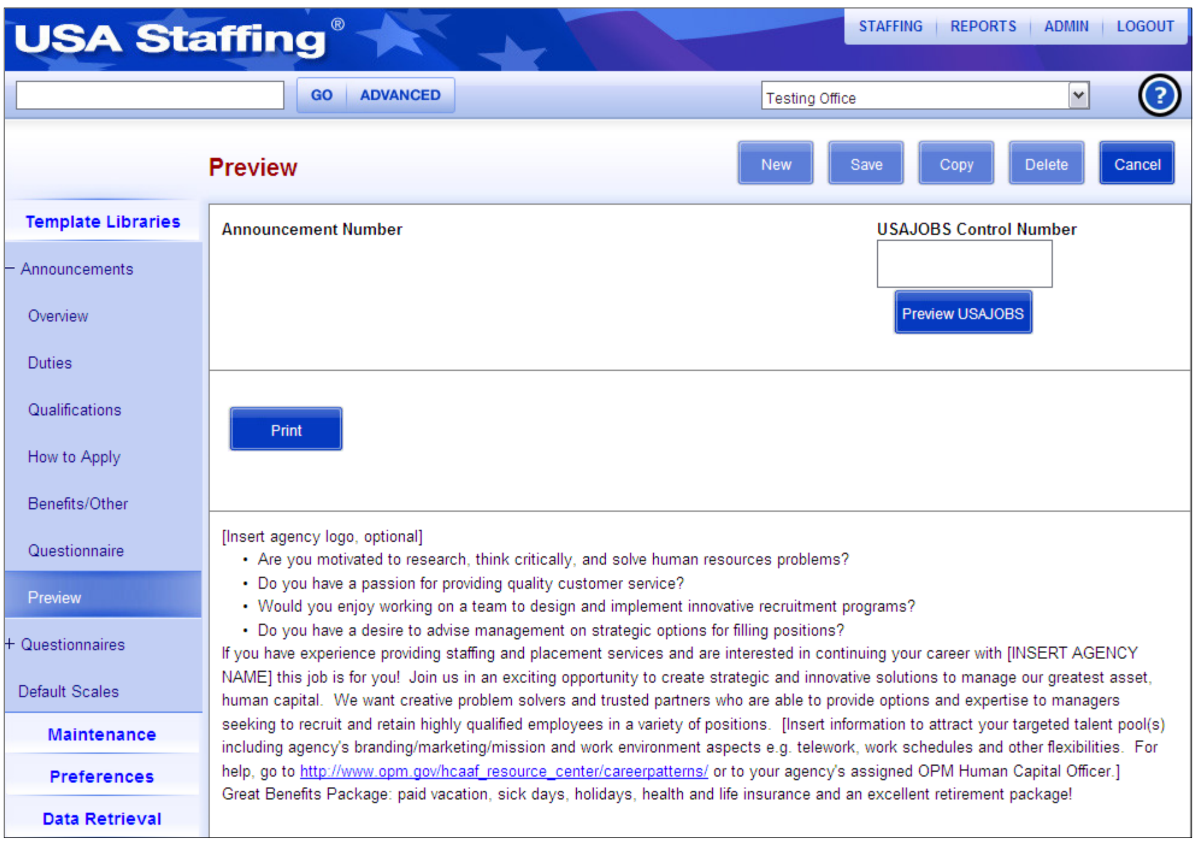
- Personal Background Information

Items with Yes/No Responses. The following items have response types that are Yes/No. The responses cannot be changed, but the text of the item itself can be modified for a variety of uses.

- Other Employment Questions (under Employment Availability)
- Background Information

Preview in the Announcement Template

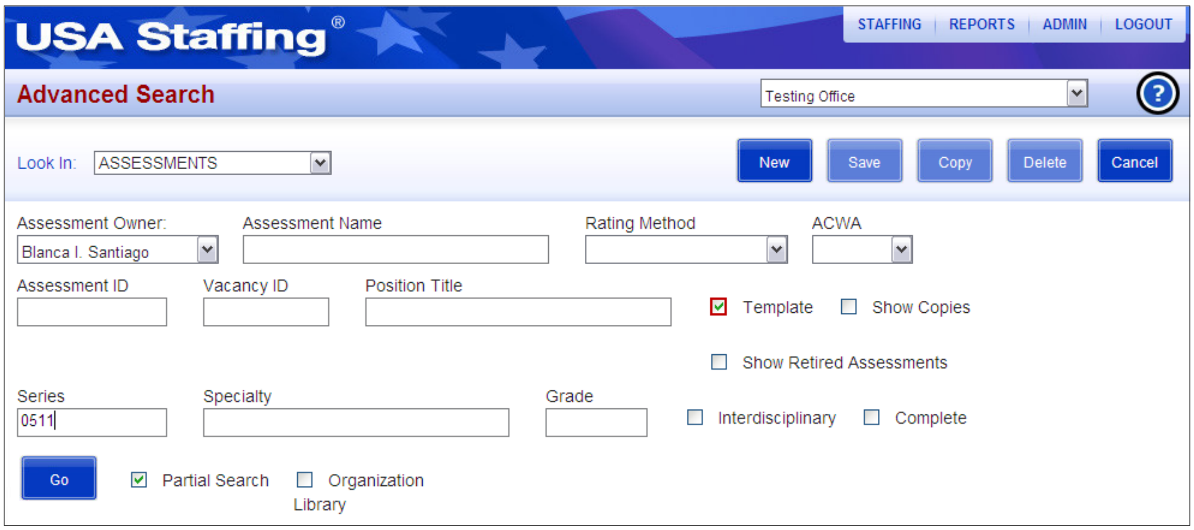
The Preview page displays the content of the job announcement. This page gives you an opportunity to review formatting, grammar, fonts, and sizes. You can click the Print button to print the announcement text. This announcement template is not associated with a VIN, so you will not have the capability to view the text in the USAJOBS format (Preview USAJOBS) and TAGs will not display VIN specific information.



Questionnaires

When you select the Questionnaire option under the Template Libraries menu, the system will present the Advanced Search page for Assessments. From this page, you can either search for an existing assessment or create a new assessment by clicking the New button.

The Advanced Search page provides various options to help you locate existing assessment questionnaires created within the office or in other offices within the organization.



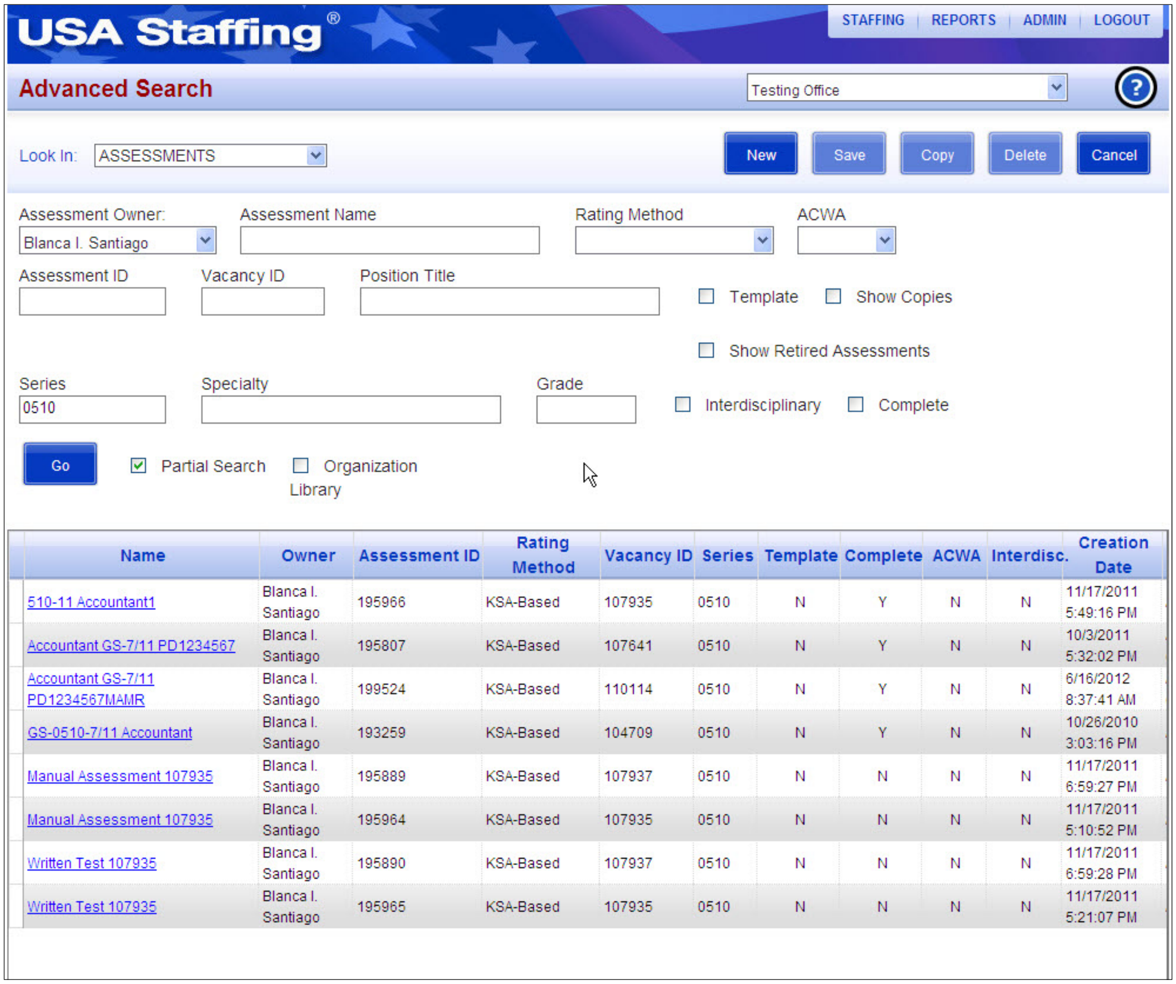
You can search for existing assessments using the following search fields. They can be used in combination to narrow the number of assessments that will be retrieved.

Search Field	Required Information	Result
* Assessment Owner	Name of the user who created the assessment template	Assessments created by that user will display
Assessment Name	Enter the name of the assessment	Assessments w/that name or variation of that name will display
Rating Method	Select KSA, Task Based, etc.	All assessments using this rating method will display
* Assessment ID	Enter the assessment ID	That assessment will display
* Vacancy ID	Enter VIN	Assessment attached to that VIN will display
Position Title	Enter the title used for assessment	Assessments w/that title or variation of that title will display
* Series	Enter series of assessment	All assessments created with that series will display

Search Field	Required Information	Result
* Grade	Enter the grade	All assessments with that grade will display
* Interdisciplinary	Check Interdisciplinary	All interdisciplinary assessments will display
* Template	Check Template	All assessment templates will display
Show Copies	Check Show Copies	Copies of templates will display
* Complete	Check Complete	Complete templates will display
* ACWA	Check ACWA	ACWA assessments will display
* Partial Search	Leave this box checked if you do not have exact information, such as author name and series	Will display results with partial information such as series and ACWA
* Organization Library	Check Organization Library	Templates developed in other office within the organization will display
Show Retired Assessments	Check Show Retired Assessments	Retired assessments will display

*Indicates search fields frequently used. Narrow the search criteria to avoid searching the database for multiple assessments. For instance, if you search just 0201 as the series, your results may include many assessments. If you search 0201 and Author's User Name, and check Template and Complete, the results will yield all 0201 assessment templates created by that user that are in Complete status.

The Assessments Advanced Search page will display assessment results in a table below the search screen. The example below used the Assessment Owner, Template, Complete, Series, and Organization Library search criteria.



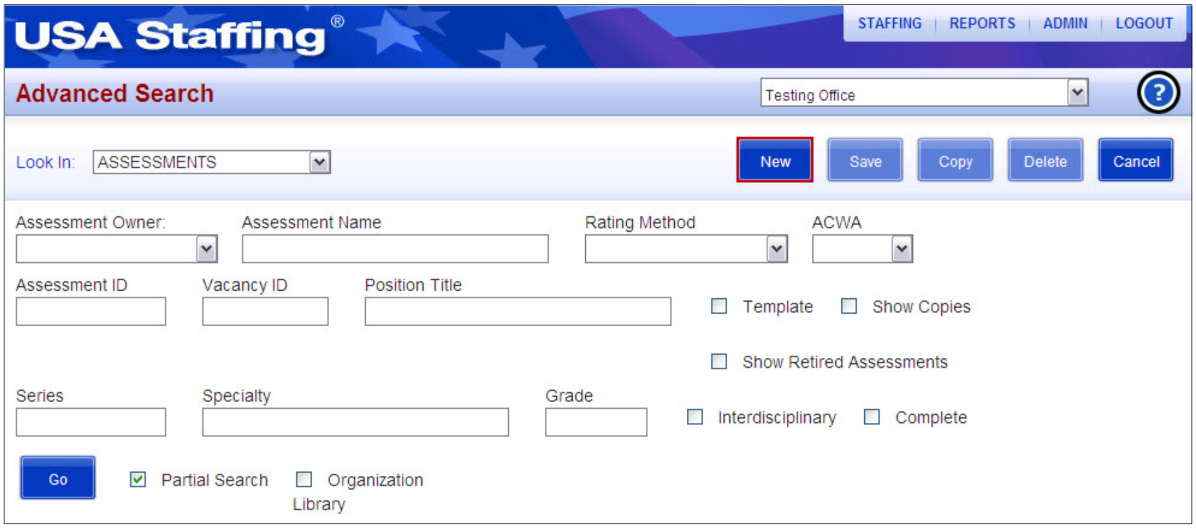
Name	Owner	Assessment ID	Rating Method	Vacancy ID	Series	Template	Complete	ACWA	Interdisc.	Creation Date
510-11 Accountant1	Blanca I. Santiago	195966	KSA-Based	107935	0510	N	Y	N	N	11/17/2011 5:49:16 PM
Accountant GS-7/11 PD1234567	Blanca I. Santiago	195807	KSA-Based	107641	0510	N	Y	N	N	10/3/2011 5:32:02 PM
Accountant GS-7/11 PD1234567MAMR	Blanca I. Santiago	199524	KSA-Based	110114	0510	N	Y	N	N	6/16/2012 8:37:41 AM
GS-0510-7/11 Accountant	Blanca I. Santiago	193259	KSA-Based	104709	0510	N	Y	N	N	10/26/2010 3:03:16 PM
Manual Assessment 107935	Blanca I. Santiago	195889	KSA-Based	107937	0510	N	N	N	N	11/17/2011 6:59:27 PM
Manual Assessment 107935	Blanca I. Santiago	195964	KSA-Based	107935	0510	N	N	N	N	11/17/2011 5:10:52 PM
Written Test 107935	Blanca I. Santiago	195890	KSA-Based	107937	0510	N	N	N	N	11/17/2011 6:59:28 PM
Written Test 107935	Blanca I. Santiago	195965	KSA-Based	107935	0510	N	N	N	N	11/17/2011 5:21:07 PM

The Open link allows users with the appropriate permission profile to open the assessment template and modify the content. Not all users can create and modify assessment templates. You must have the appropriate permission profile to develop or modify templates. Typically, OAs have permissions to develop and alter templates. Assessment components created in the library are not linked to a VIN. This gives you the capability to build assessments beforehand or create them as needed and have them available for future use.

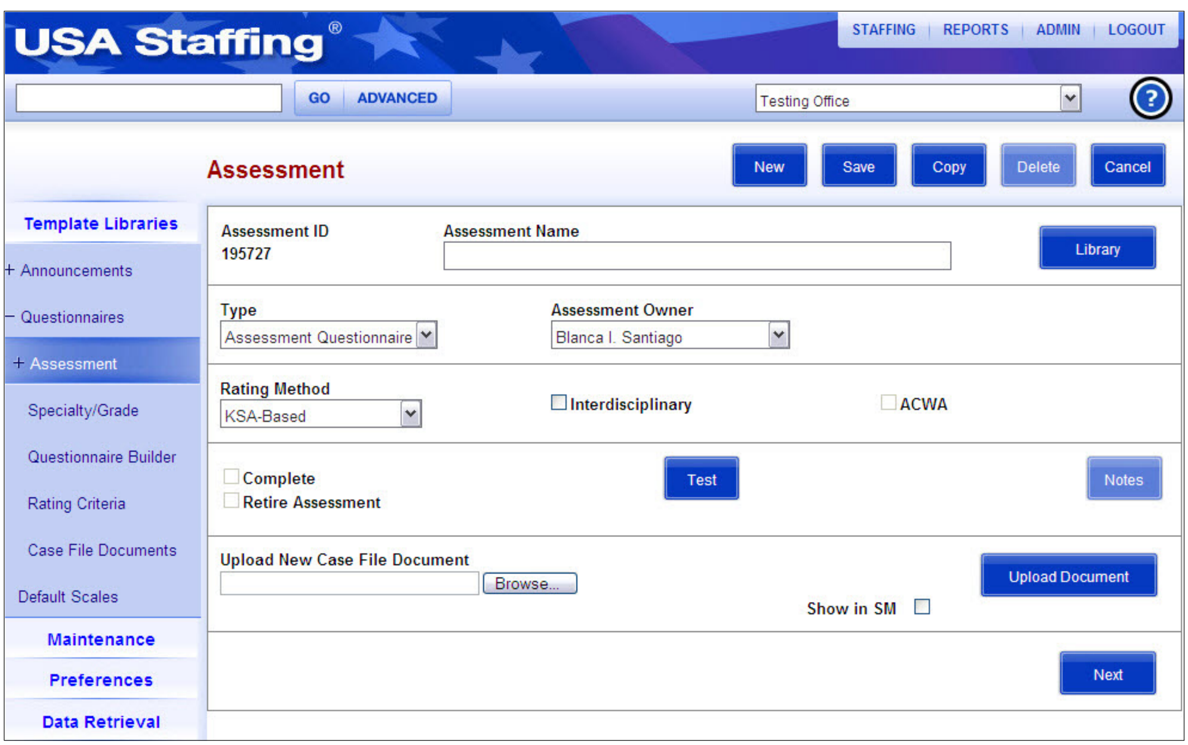
Note: Once a template is attached to the VIN, a standard user can alter the assessment. The assessment linked to the VIN is a copy of the original template. The original template will remain intact and available to other users, regardless of changes made to that copy at the VIN level.

Creating a New Questionnaire Template

The Advanced Search page also allows you to start a new questionnaire template. Again, the ability to create templates may be restricted by your system permission profile.



To create a new questionnaire template, click the New button at the top of the Assessments Advanced Search page. The Assessment page is the first page of the assessment template. The Library button may be used to find an existing template. Once a template is selected from the library, a copy of the original template is created which can be modified to fit the position being advertised.



Assessment ID. Once the assessment name is entered and saved or a copy of an assessment is imported from the library, the system will automatically assign an assessment ID number. Make a note of the ID number; it will make searching for it easier.

Assessment Name. The Assessment Name field holds up to 30 characters and must be unique. The assessment naming convention is important. Name your assessment so you, and more importantly others, can find it easily from among the many that may have a similar name. Consider using these elements when assigning a name to your template: series and grade, the organization's acronym, and the PD number. Example: GS-0510-7/11 ASMB PD1234567

The series and grades are both key attributes, while the organization/component acronym and the PD number provide clarity for users who are considering using the questionnaire in their announcement. The assessment may be the right series and grade, but that alone does not make it suitable for your job announcement. Consult with your OA for naming convention guidance.

Type. Leave the assessment type as Assessment Questionnaire (the default) when building an online questionnaire in the system or select the appropriate type from the drop-down list.

- Assessment Questionnaire – This is a self-report form that the applicant completes online or on paper using the 1203-FX (Form C) and faxes for processing. Typically, applicants respond to questions about their level of experience by choosing from a list of possible experience levels. This is the predominant type of assessment when developing templates.

Assessment Owner. This drop-down list initially shows the user who creates the assessment template. 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 – The KSA-Based rating method is based on the evaluation of valid and measurable knowledge, skills, and abilities or competencies. Scoring is based on valid benchmark questions and responses for each KSA or factor as well as determining whether applicants meet minimum qualification requirements. This method is used for white collar positions. Scoring is based on the sum of the factor values or the total response points divided by the number of questions for each factor. This score is then transmuted into a score from 70 to 100.

- A-C-E (Rating Method III) – The A-C-E or Quality Level Rating procedure/method, used for white-collar positions, combines an applicant's total qualifying experience and education/training into a single quality level rating; for example, A level = 90, C Level = 80, and E Level = 70. This also provides the opportunity to assign additional points, by using job-related competencies/KSA. For Level A, up to 10 additional points can be assigned, and for Levels C and E, up to nine additional points can be assigned.

- Task-Based – This rating procedure, used for white collar positions, is used to determine minimum qualifications and ranking based on the total of all the benchmark/question response values. The total response values are transmuted from a raw score to a 70 to 100 if needed.

- Job Element – This examining procedure is for blue collar (wage grade) positions and based on prescribed job elements for the position. The scoring structure requires an applicant to meet the 2-point level for the screen-out element and possess an average of 2 points for all elements. The scoring scale is fixed from 0 to 4 points for response values.

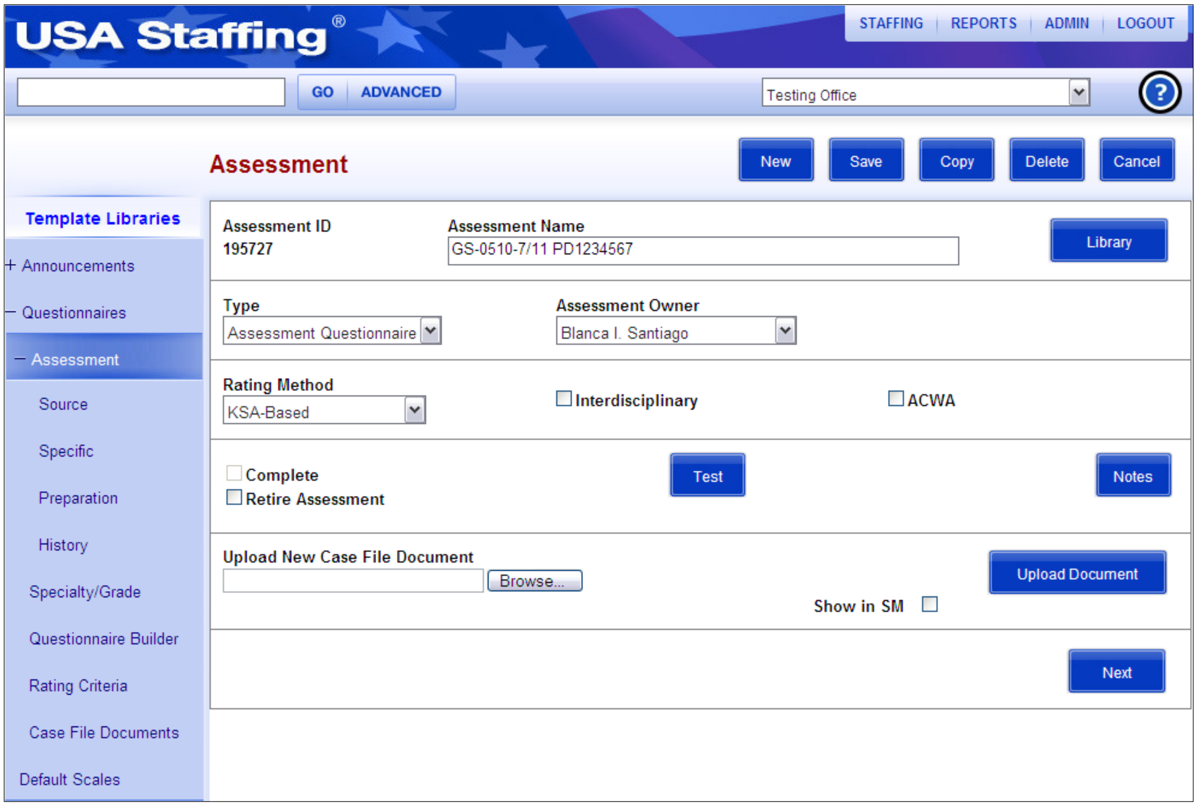
- Written Test – This scoring/rating method is based on written test results in combination with one of the methods above to determine minimum qualifications. Typically written tests are a separate component and combined with a Minimum Qualifications questionnaire.

Interdisciplinary. Check this box if the position is interdisciplinary (classified to more than one series). This checkmark enables the system to accept more than one series in the Specialty/Grade page of the assessment. When this assessment type is indicated, the system links the series to the USAJOBS announcement and a copy is posted under each series for search purposes.

ACWA. This box is checked automatically if the position is covered under the Administrative Careers With America (ACWA). These ACWA assessment templates are provided in the library if the agency is approved to use them. Approval to utilize the ACWA assessment method is requested and granted from a separate area of OPM and is not part of the USA Staffing Program Office. Contact the USA Staffing Help Desk if ACWA guidance is needed.

Complete. A check appears in this box automatically after the assessment has been tested. Assessments cannot be modified if there is a check in this box. To modify an assessment marked as Complete, remove the checkmark, modify the assessment, and re-test it. If there is no check in this box and it is grayed out, the assessment must be tested. Once testing is completed, the checkmark is assigned indicating this assessment is ready for use. You cannot release your announcement to USAJOBS if the assessment is not in Complete status. Un-checking the Complete box when an announcement is live will result in applicant not being able to apply/respond to the questionnaire.

Test. To test the assessment, click the Test button on either the Assessment page or the Rating Criteria page. Questionnaire type assessments cannot be put into production and used to rate applicants until they have been tested and the Complete box is checked. This test performs very basic checks to help you determine whether the rating process will work as you intended.



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

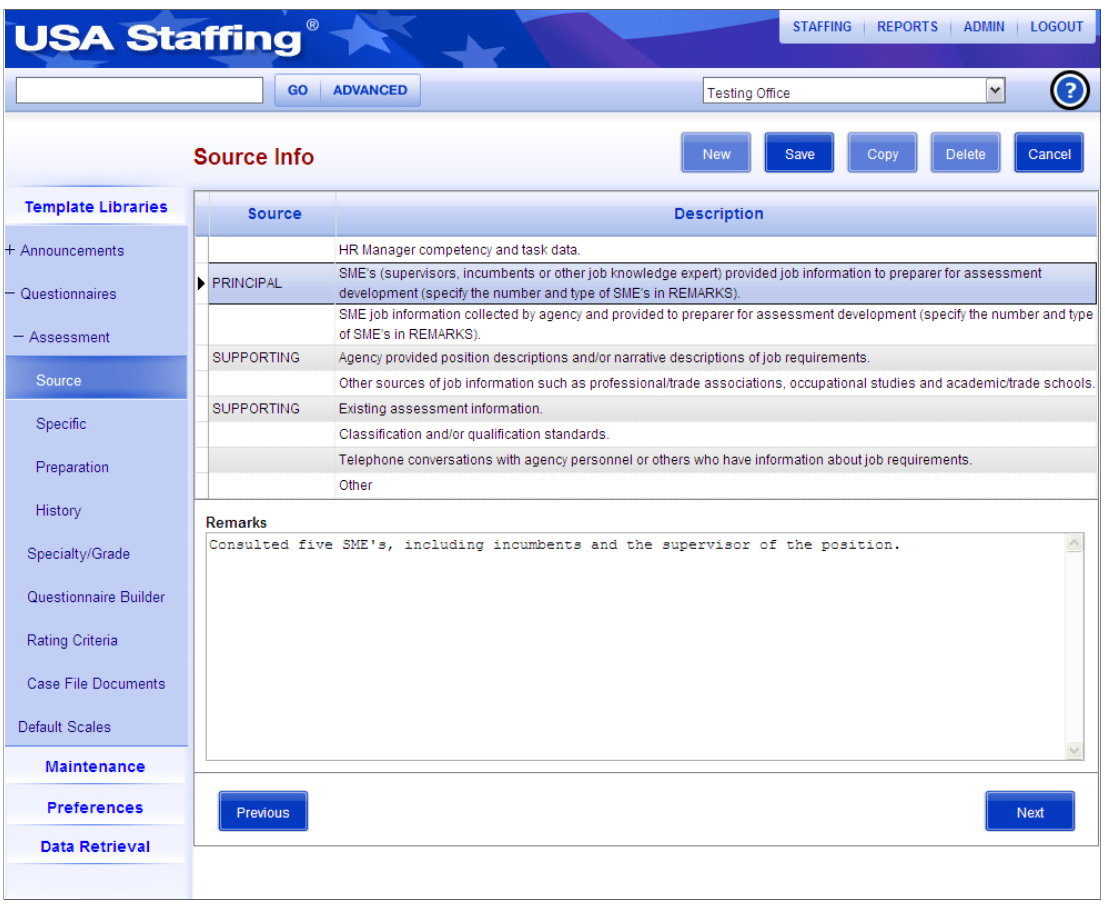
Note: As part of the assessment development process you must annotate source information used to develop the assessment. Source documentation is necessary for each assessment developed. There are three source information pages that must be completed: Source Info, Specific Info, and Preparation.

Source Info

The Source Info page is where the source(s) or information used to develop the assessment and how you used them is documented. Accurate documentation is important to reconstruct and demonstrate validity if the assessment method is later challenged. At least one principal source must be identified on the Source Info page in order for the assessment component to be tested or marked Complete so that it can be used to rate. For each source that you use on this page, select in the Source column whether the source was a principal or supporting contributor of the information used.

To indicate source, follow these steps:

- Click once in the box under the Source column adjacent to the applicable description row.
- Select either Principal or Supporting on the source drop-down list. Remember, you must have at least one principal source or the assessment is incomplete. You may have one principal and one or more supporting items. To view or modify the notes later, you must select the Source by clicking on its row.
- Add documentation notes in the Remarks box for the Source selected.
- Click the Save button once you have entered the information.



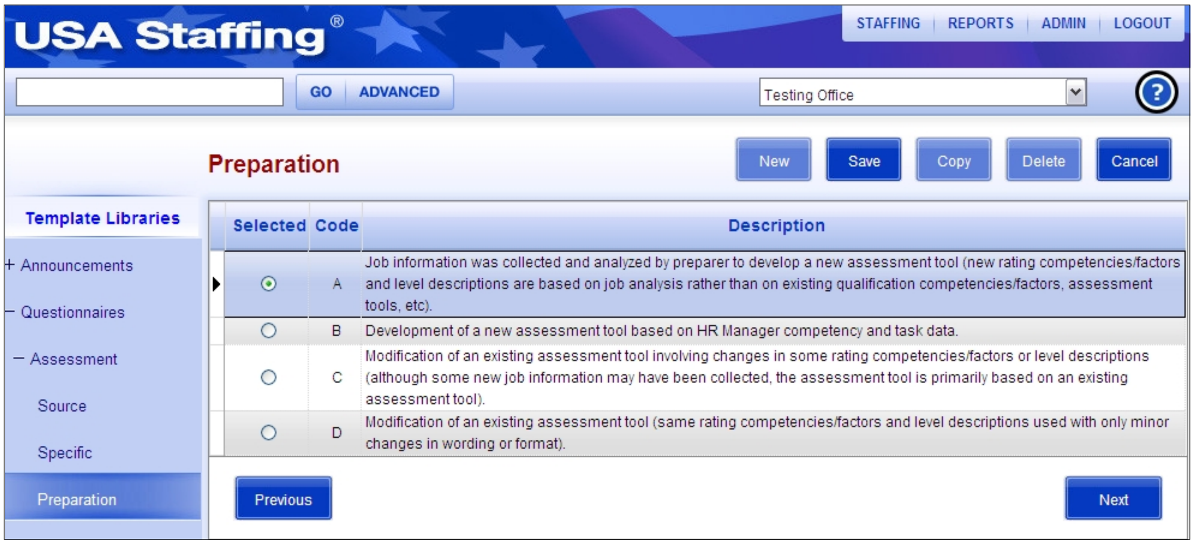
Specific Info

The Specific Info page captures more specific information about the resources used to develop the assessment. Accurate documentation is important to reconstruct and demonstrate validity if the assessment method is later challenged. Follow these steps:

- Place a check in the box for each description that reflects the specific information source used to develop the assessment.
- Click the Save button.
- Click the Next button at the bottom of the page.

Preparation

The Preparation page is where you further document the sources you used to develop the assessment. Accurate documentation is important to reconstruct and demonstrate validity if the assessment method is later challenged. Follow these steps:



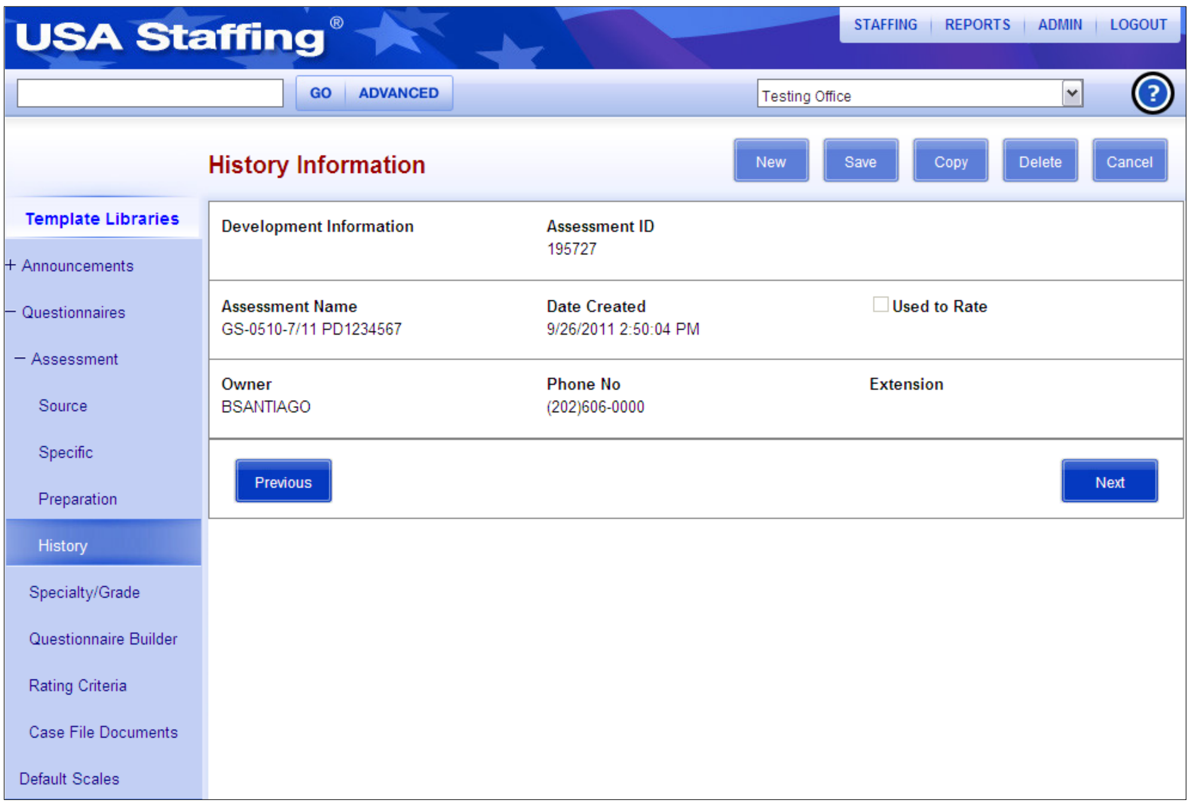
- Select the radio button for the description that reflects the source of information you used to develop the assessment.
- Click the Save button.
- Click the Next button at the bottom of the page.

History Information

The History Information page provides development information such as:

- Assessment ID
- Assessment Name
- Date Created
- Owner

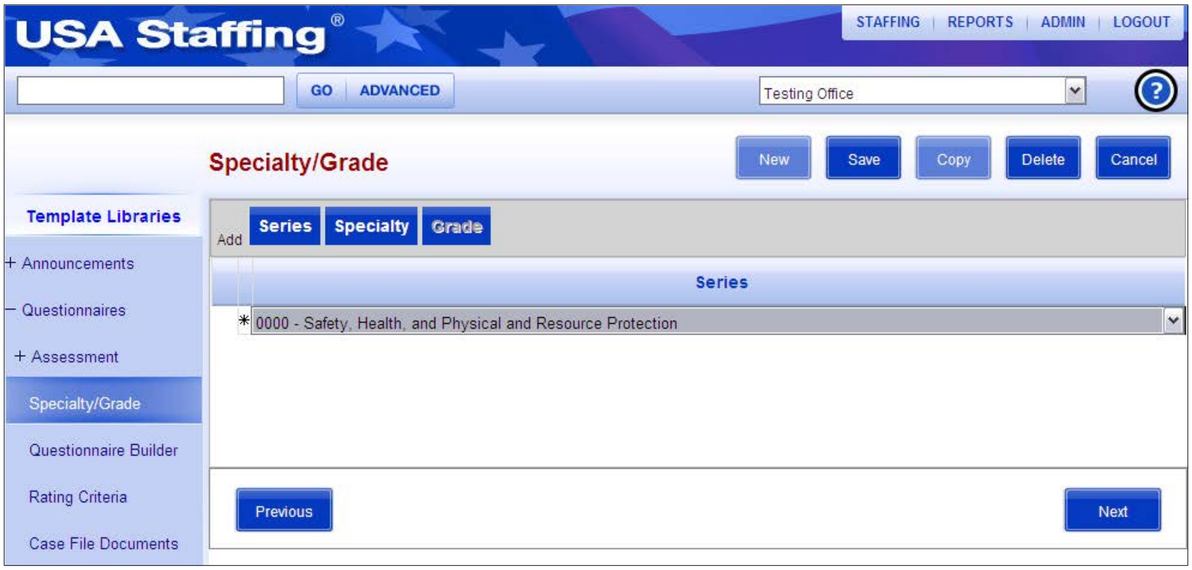
Used to Rate. This box indicates whether the assessment was used to rate applicants previously.



Specialty/Grade

On this page you can add the specialty/grade for an assessment template by following these steps:

- Click the Series button by using the drop-down arrow. Use the scroll bar to locate the series.



- Click the Specialty button and type in a specialty code and name.
- Click the button again to add more specialties.
- Click the Grade button and type in a grade. Click the Grade button again to add more grades for the specialty. To add grades for a different specialty on your list, select the specialty first and then add the grade.

Note: You must enter a complete set of Series + Specialty + Grade or the record will not save.

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

Questionnaire Builder

The Questionnaire Builder page is where assessment content is managed. The Questionnaire Builder page and the Item Editor allow instructions, questions, responses, and narratives to be included as part of your questionnaire. Responses can be customized per question or they can be in the form of a default scale. What items are actually included in your assessment will vary from position to position. These questions and responses will be the assessment portion of the online application when applicants apply via USAJOBS and will also display in your job announcement by using the Link to Full Questionnaire TAG. The Questionnaire Builder page is pictured below as it would appear before information is added.

You can use the controls on the bottom of the Questionnaire Builder page to take the following actions:

- **Add Factor.** You can add factors (competencies/KSAs).
- **Add Item.** You can add items that are associated with a factor. Items are instructions, questions, default scales, or a narrative text box.
- **Import Document.** Properly formatted text documents allow the assessment questions and responses to be imported. The Preview page, mentioned below, displays the assessment questionnaire properly formatted for import.
- **Preview.** The Preview page displays the questionnaire format, to include factors, instructions, questions, responses, default scales, and narratives. This preview is the same format required for the assessment import process.
- **HR Manager**. HR Manager can serve as a resource or starting point when you develop assessment tools from scratch. HR Manager will identify appropriate competencies, tasks, benchmarks, and questions by series and grade. It is provided as a tool to assist you with your questionnaire development.

HOT TIP! A factor is the name of a competency, job element, or a KSA (knowledge, skill, ability). Most questionnaires use questions that relate to factors to show their job relatedness. Factor names do not normally appear in the actual questionnaire, but it is possible to have them appear by inserting the names as Instructions.

To build a questionnaire from scratch, take the following steps:

- Add Factors:
    - Click the Add Factor button at the bottom of the page. This will take you to the Competency Factor page, and a new row will be added to the top of table.

    - In the new row under the Competency/Factor heading, type in the name of the factor.
    - While you are on the Competency Factor page, click the New button to add additional factors.

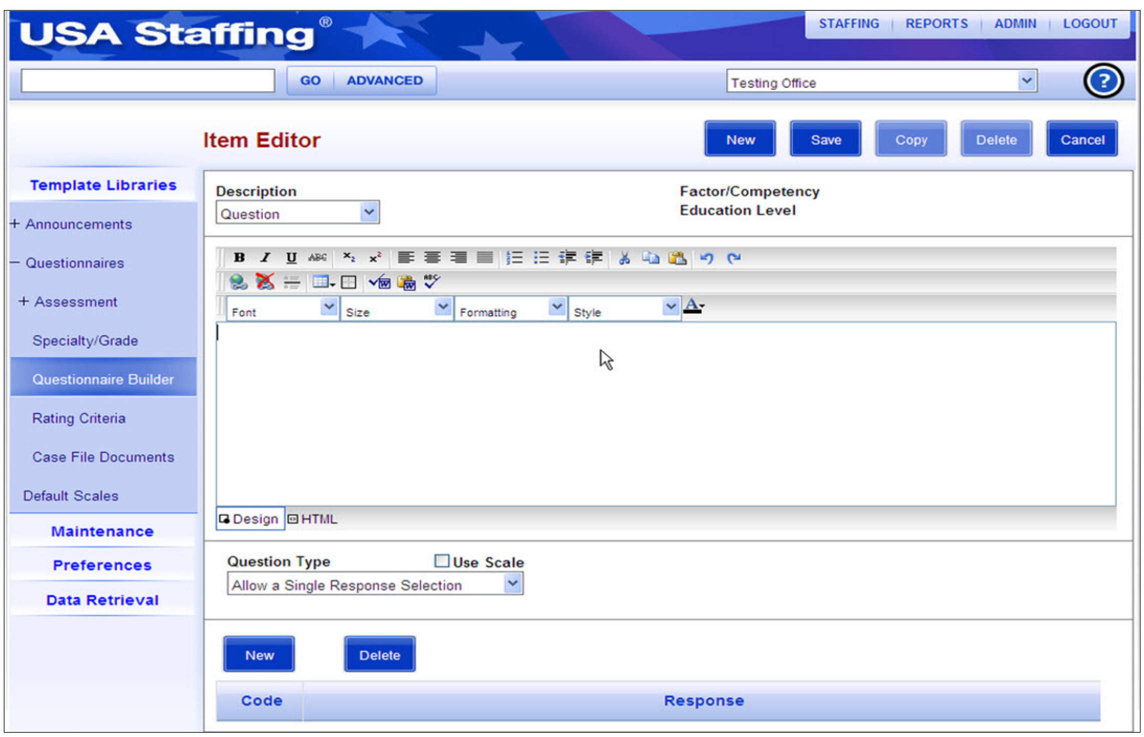
- o When you are finished adding factors, click the Save button. The factors will display on the Questionnaire Builder page.

- Add Items:

Note: An item is an instruction set, question (may contain custom responses), default scale response, or narrative included in the questionnaire. All items are associated with a factor.

- Select the column to the left of the Competency/Factor name. An arrowhead to the left of the name shows the item selected.

- Click the Add Item button at the bottom right corner of the page. This will take you to the Item Editor page.

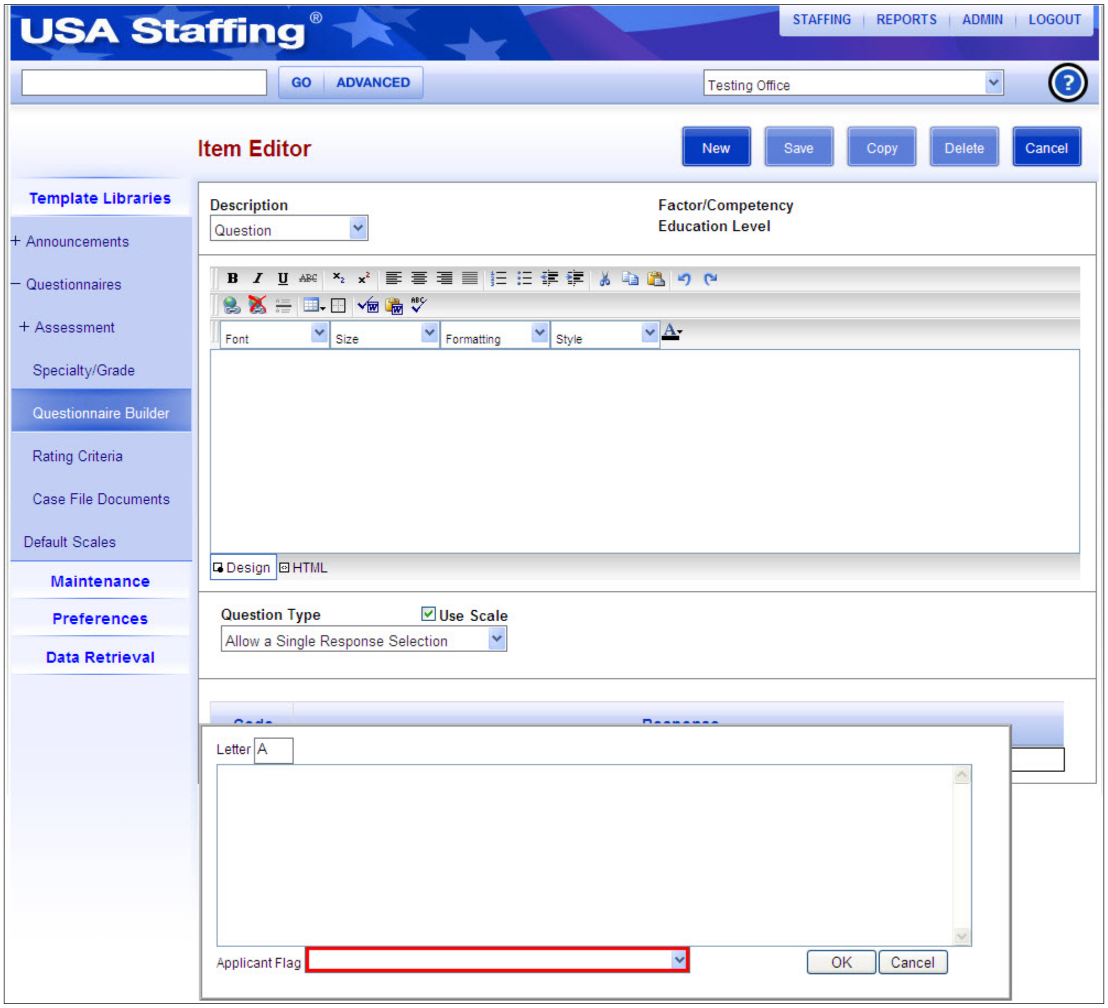


- On the Item Editor page, you create and modify the items that are part of the questionnaire. Here are the types of items you can work with on this page:
  - Questions. The system defaults to Questions. To enter a question, leave the default Question set and add text to the box on the lower portion of the page.
  - Responses. Once the question text is entered, click the New button at the bottom of the Item Editor page.
  - Question Type. The system defaults to Allow a Singe Response Selection. Multiple Answer/Multiple Response Assessment Question Types is included in the drop-down list at the bottom of the page.

Note: Default scales are not used with minimum qualifications or other screen-out questions. These responses are typically customized to fit the position or screen out requirements. Repeat as necessary to include all required response types as appropriate, i.e., experience, education, combination of education and experience, and a response that allows the applicant to indicate they do not have either the education or experience described.

Multiple Answer/Multiple Response Assessment Question Types. The multiple answer, multiple response question type allows applicants to select all applicable responses to a specific question. This question type is intended to collect multiple, specific pieces of information about applicants' experience. Multiple response questions can be used with KSA and Task-Based assessment questionnaire types. This question type can be used with rating factors and cannot be use with screen-out factors.

Applicant Flags. These allow a specific response to be flagged. When an applicant selects that response, a flag is assigned to that applicant's record. That flag will appear next to the applicant's name on the certificate. Typically, flags indicate some positive attribute of the applicant.



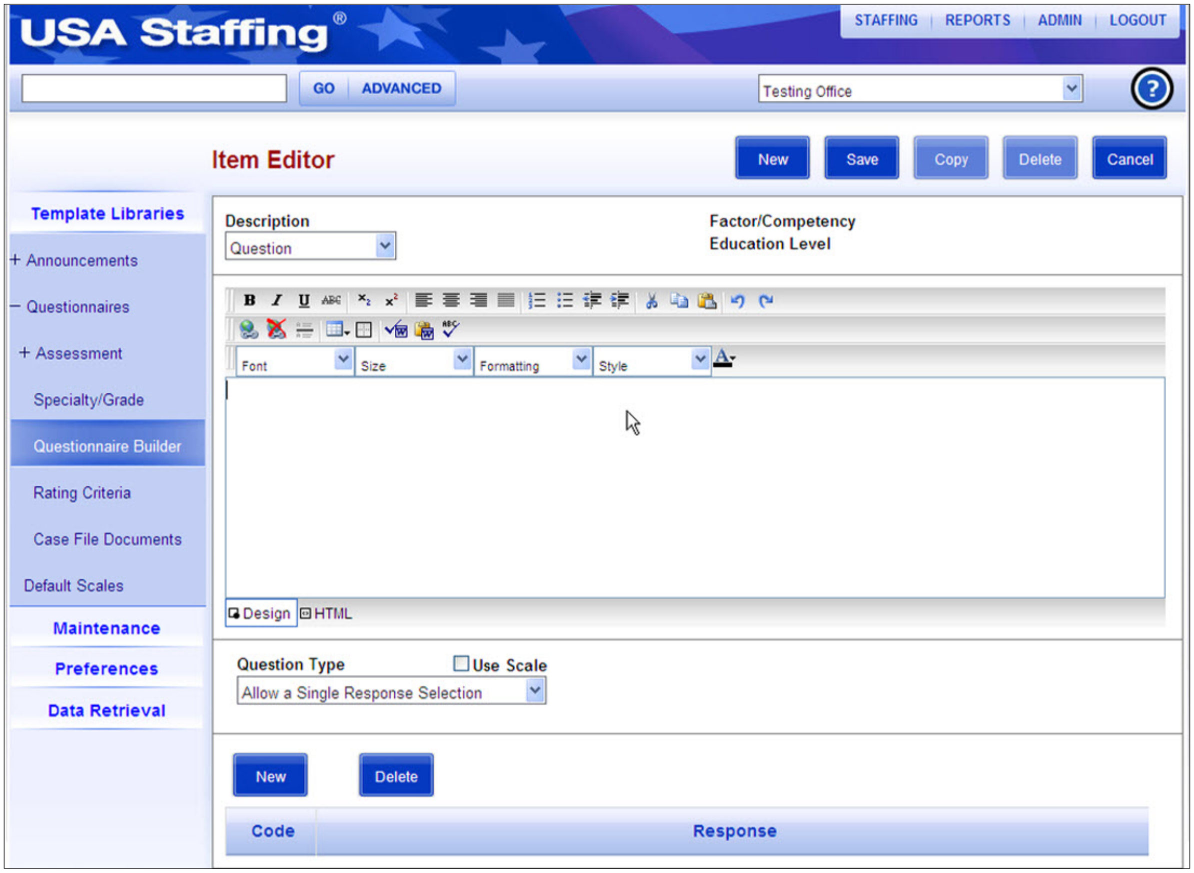
Narrative. You can insert a narrative response question and its corresponding answer box. Typically, you would have a multiple-choice response question immediately preceding the narrative one. If narratives are used in your questionnaire and you allow applicants to apply using the 1203-FX Form C the announcement should outline how the applicant should submit narrative responses if they are faxing their responses and not applying online.

Instruction. The instruction item is used to provide direction to the applicant about how to complete or respond to some aspect of the questionnaire. If you want the system to display the name of the factor before the related questions, you can create an instruction with the factor name. This instruction/factor name will display to the applicant when they complete the questionnaire.

Default Scales. To apply the default scale to the rating factors, follow these steps:

- Select the column to the left of the factor where you want the default scale to begin. An arrowhead to the left of the name shows the item selected.
- Click the Add Item button.

- The Item Editor page opens.

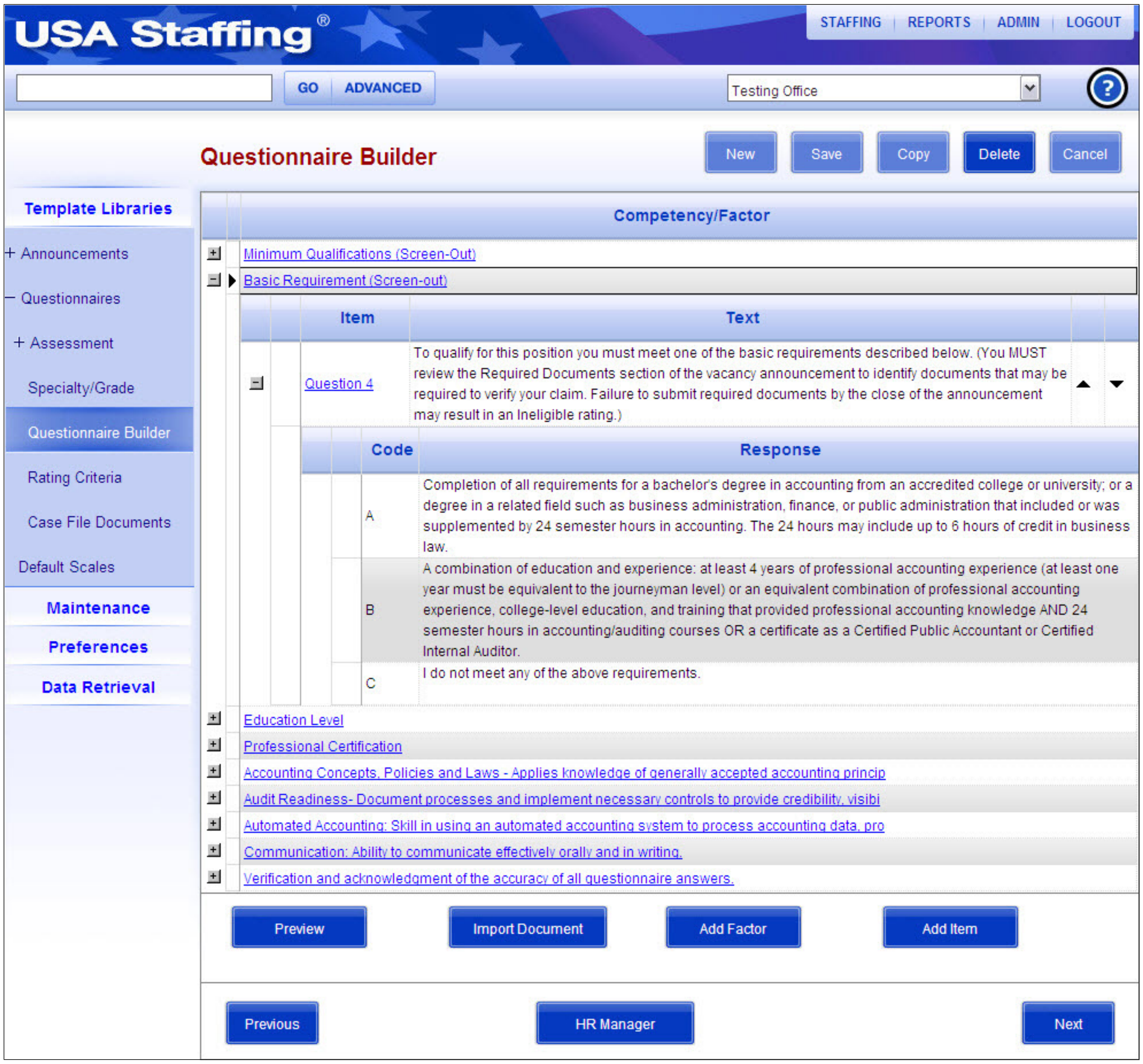


- Using the Default Scale Template drop-down list, select the appropriate response scale.

- Apply Scale To – Select the last question in the drop-down list to which you want to apply the scale. The system will automatically load this response scale to all questions.

- Click the Save button.

The picture below is Questionnaire Builder with factors and items added. On this screen, the plus signs have been opened to show the items associated with the second factor and the responses associated with question 4.



Rating Criteria in Assessment within the Questionnaires Template

The Rating Criteria page is where you set up the rating process for the assessment. Factors are designated as Screen-Outs, Rating, or neither, and values associated with the individual responses. USA Staffing is very flexible and allows you to specify for each combination of factor/specialty/grade whether or not points from the factor will be taken into account in arriving at a score and whether the factor will be a screen-out factor. The system provides shortcuts to keep your effort to a minimum.

Below is an explanation of how you can use the settings on the Rating Criteria page on the Assessment menu to make USA Staffing do what you want it to do with screen-out and rating factors.

Screen-Out Factor. A screen-out factor is used to determine basic eligibility. If the applicant does not meet this basic eligibility, the applicant is "screened out" from further consideration for that specialty and/or grade. If you set a factor to be a screen-out, you must also set a minimum qualifying (MQ) value. The MQ value is the value or points an applicant must receive for their response to the screen-out question(s) to be considered eligible. The MQ value is the average response value for the questions under the factor. You also need to specify an ineligible code the system will assign to the applicant record if they do not get the MQ value. This ineligible code will show on the Notice of Results for an applicant who scores below the MQ 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 help 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 5 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. The system will not include the points in calculating 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 get at 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, a specified number of semester or quarter hours, and additional education or experience (or a combination of both). You can 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. See chart below.

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

Minimum Qualifying Value (2) × Number of Questions for the Factor = Total Response Value Needed to Qualify

Note: In this example, both questions must be answered Yes for the applicant 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, a specified number of semester or quarter hours, 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 (i.e., Question 1):
  - 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–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? (Question 2)
  - Do you have this type of additional education or experience or a combination of education/experience? (Question 3)
  - 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 – SCREEN-OUT		
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:

	Responses to Questions										
	Factor 1				Factor 2						
Possible Outcomes	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

Minimum Qualifying Value (2) × Number of Questions for the Factor = Total 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 (screen out) for Factor 2 has been set at 2 for both grade levels. In this example, the response for qualified applicants has been set at 4 for the GS-9 level (Question 2). Likewise the qualifying response has been set at 4 for the GS-11 level (Question 3).

If the applicant answers Yes to Question 2 and No to Question 3, the applicant qualifies at the GS-9 level. If the applicant answers Yes to both Questions 2 and 3, the applicant qualifies for both grade levels. Similarly, if the applicant answers No to Question 2 and Yes to Question 3, the applicant qualifies for both grade levels.

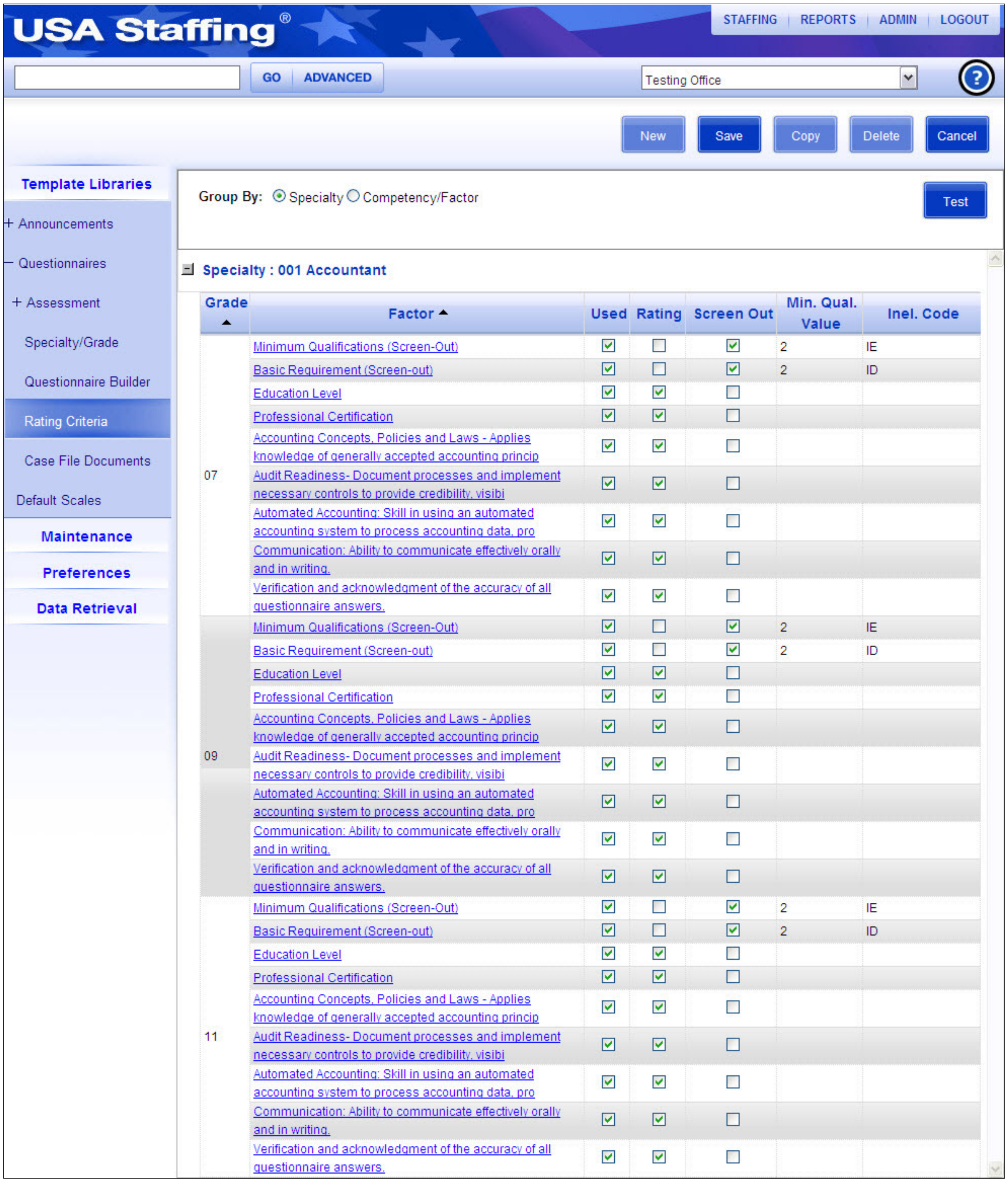
To pass the screen-outs at the GS-9 and GS-11 levels, the applicant must answer Yes to Question 1 and answer Yes to questions 2 or 3.

To qualify at the GS-9 level, the applicant must 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 their response to Question 3 will also qualify for the GS-9 level.

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 picture below shows the Rating Criteria page with one specialty and three grades.

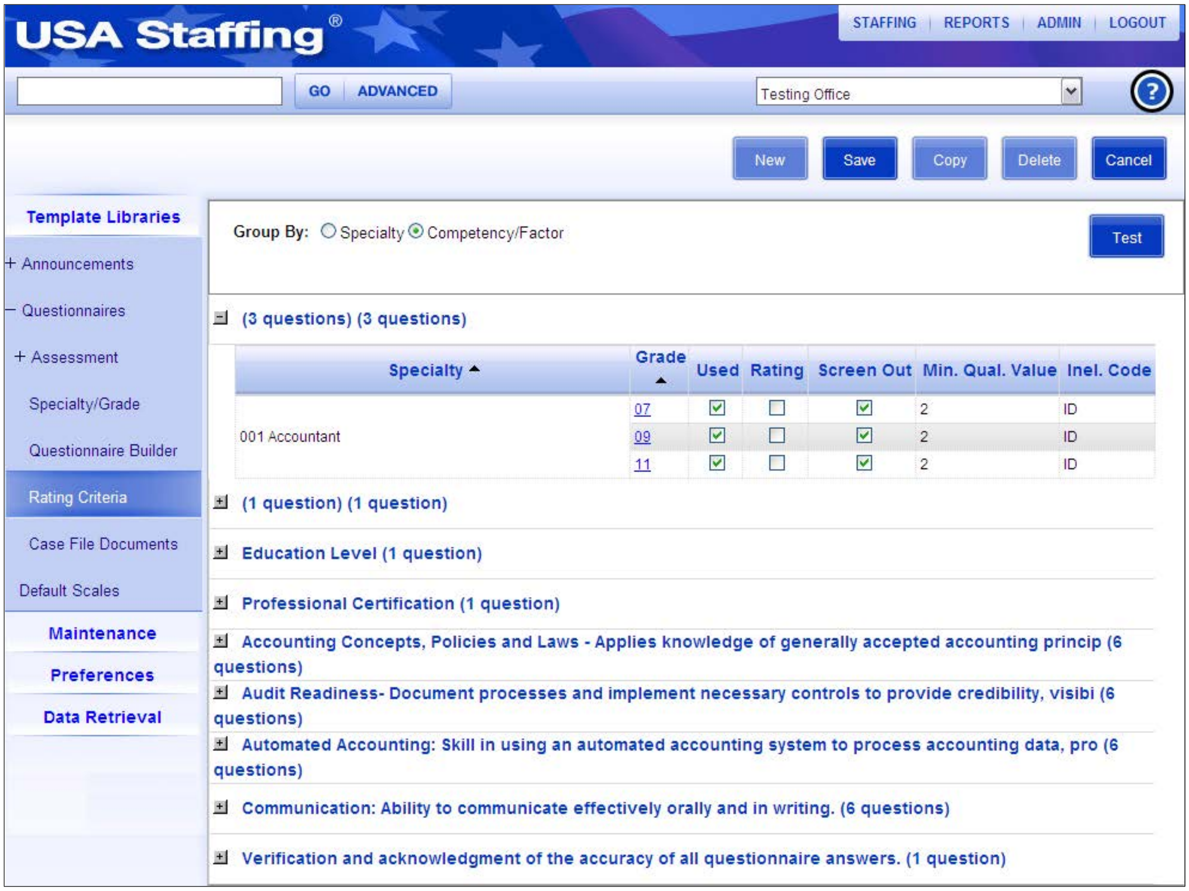


Regardless of the view you select (Group By: Specialty or Competency/Factor), there are three actions you can take on this page:

- Enter values as appropriate for Used, Rating, Screen-Out, Minimum Qualifying Value, 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.

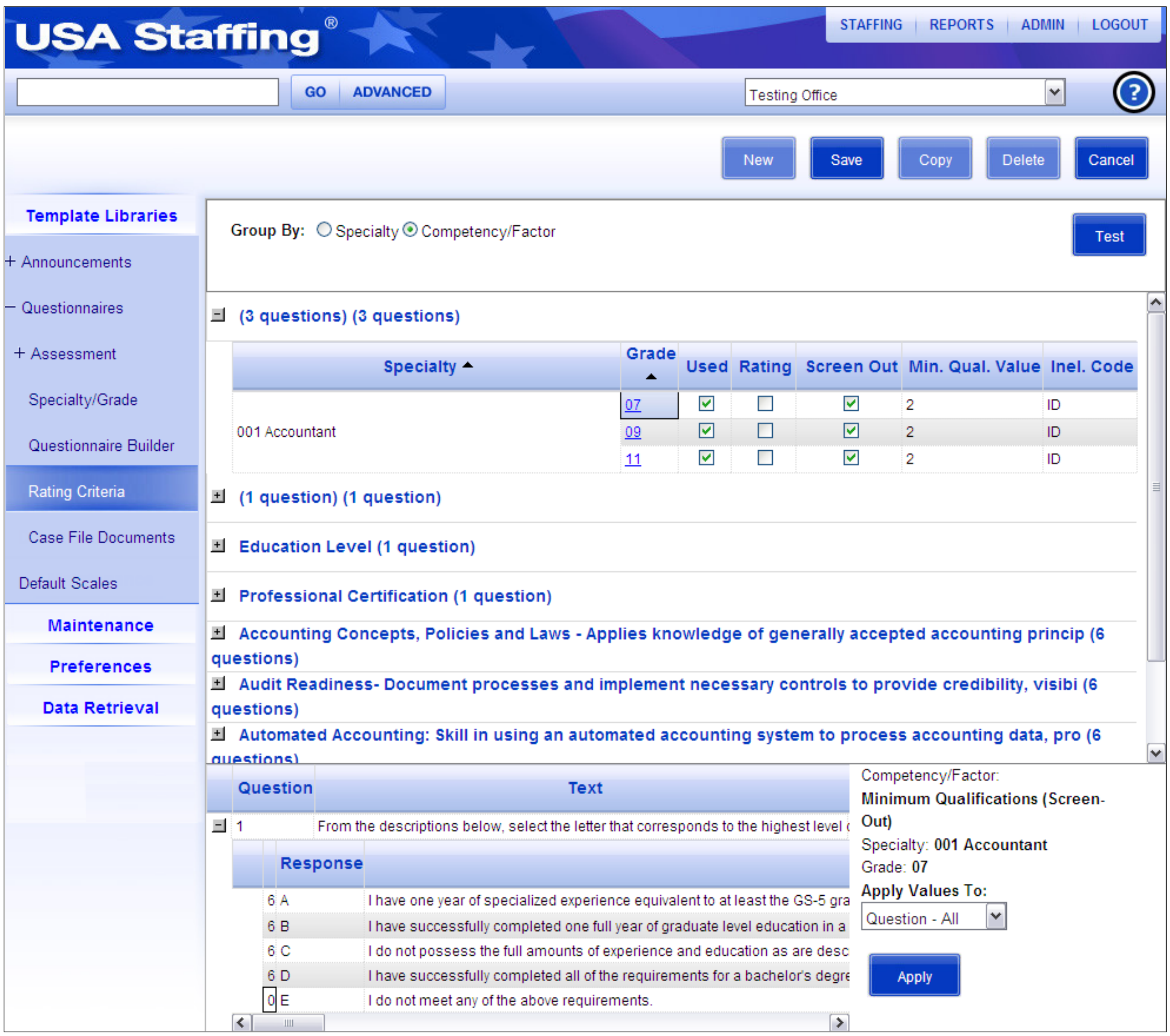


These are the steps to take on the Rating Criteria page.

- On the first row of the table, showing the first specialty/grade combination, enter the appropriate values for the items listed below:
  - **Used.** The system puts a check in this 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, select this box to remove the check and turn off the factor.
  - **Rating.** The system puts a check in this box by default to indicate that the factor is going to be used as part of the numeric score.
  - **Screen-Out.** Place a check in the 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.

- **Minimum Qualifying Value.** In the Min. Qual. 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; then select the Min. Qual. Value box and type a number.

- **Ineligible Code.** In the Inel. Code column; select from the drop-down list the code you want the system to assign when an applicant is ineligible on account of failing the screen-out factor you are working on. To do this, make sure there is a checkmark in the Screen-Out box and a number in the Min. Qual. Value box. Then select the Inel. Code box. When the drop-down selection arrow appears, use it to find the appropriate code, then select it. (See Appendix C for the list of NOR Message Codes.)



- For every question in the questionnaire, enter in the number of points you want the system to assign to each possible applicant response for the grade you are working on. To do this, follow these steps:

  - Select the plus sign to fully expand the tree view for the factor/specialty/grade you are working on.
  - Select the first factor for the grade.
  - Select the plus sign next to the question for which you want to assign point values.
  - Select the box to the left of the response and type in the number of points.
  - Click the Save button.
  - Repeat this step for all responses for all questions for the factor/specialty/grade you are working on. Do one grade at a time.

- Click the Save button.
- Repeat the first three steps for each grade covered by questionnaire.
- Select the next factor from the Factor selection box. Repeat the first four steps for each factor.

Alternatives: Apply Values To

If your assessment covers multiple specialties or grades, then you will need to determine whether or not the values you assign to the responses for a particular question for one specialty/grade combination should be used for the same question in other specialty/grade combinations. If they should, then you can use shortcuts to apply the values to the responses for entire groups of questions.

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

- Question – Grade. This is the default setting if no other option is selected. This means that the system will apply the response values for this question only at this grade level. You can use this option to reset back to the default if you select one of the other options and then change your mind.
- Question – All. This will apply the response values for this question to this same 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 that 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.

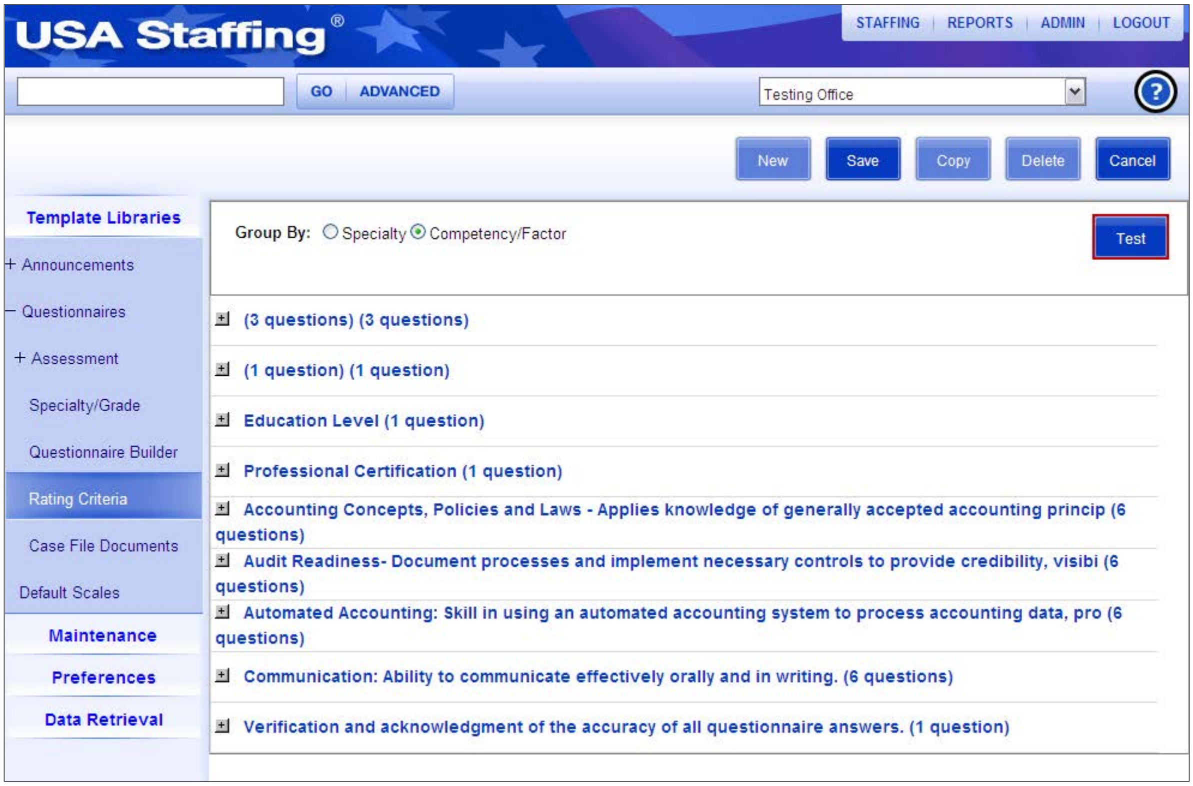
To use one of the alternatives, follow these steps:

- Make sure the Response Value table is still displayed for a question for which you have already entered response values.

- Select the appropriate option from the Apply Values To drop-down list at the bottom right of the page.

- Click the Apply button.

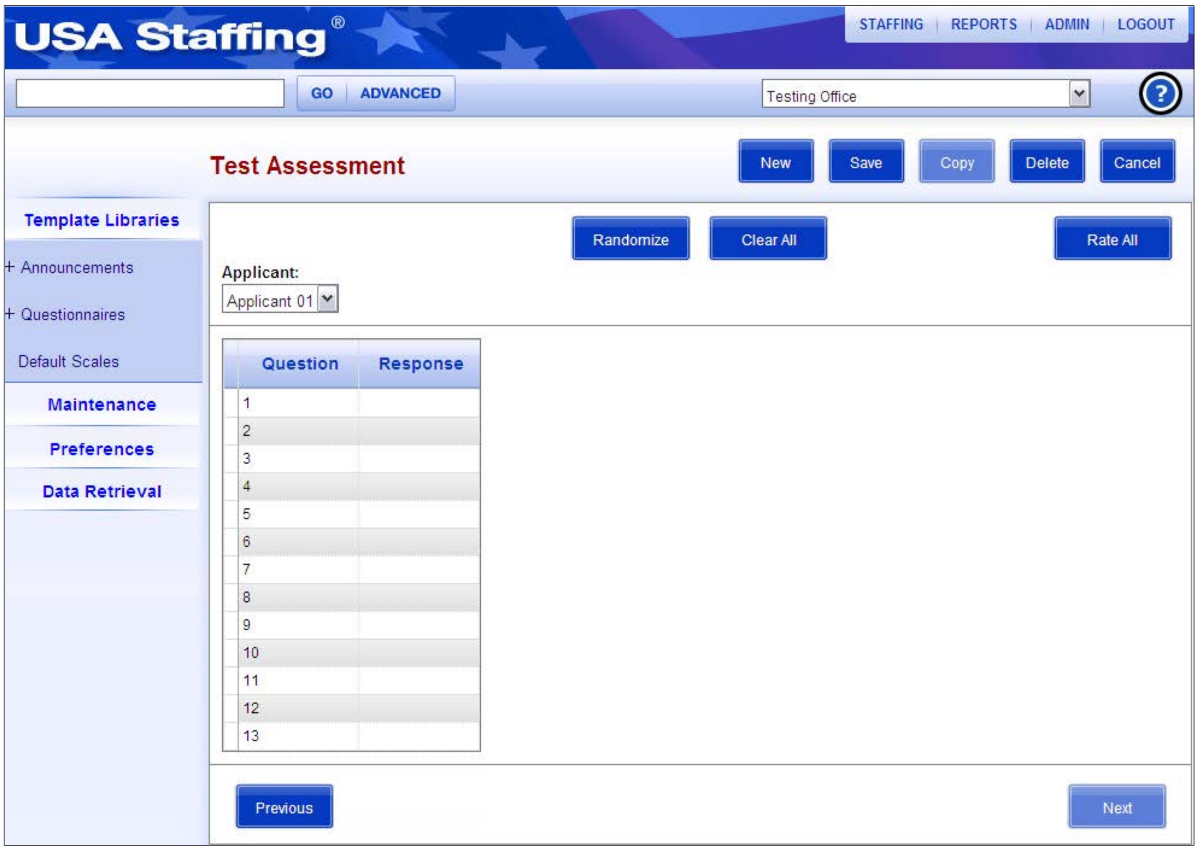
- When you finish selecting all the factors, test the rating criteria by clicking the Test button at the top of the page.



Testing the Assessment

The assessment must be tested and verified before it can be linked to an announcement, used to rate applicants, and released to USAJOBS. To test the assessment, the system will create fictitious applicants and you add questionnaire responses to confirm that the screen-outs and rating questions are working as expected. Follow the procedures below.

- Click the Test button on either the Rating Criteria page or the Assessment page. The Test Assessment page is shown below.



The questions in this table correspond directly to the questions in your assessment. If you created 14 questions in your assessment, you will see 1–14 in the Question column. Keep in mind, if your assessment has minimum qualification questions or screen-outs, you will enter the letter of a qualifying or disqualifying response for that question. You must ensure the screen-out and rating questions work as intended.

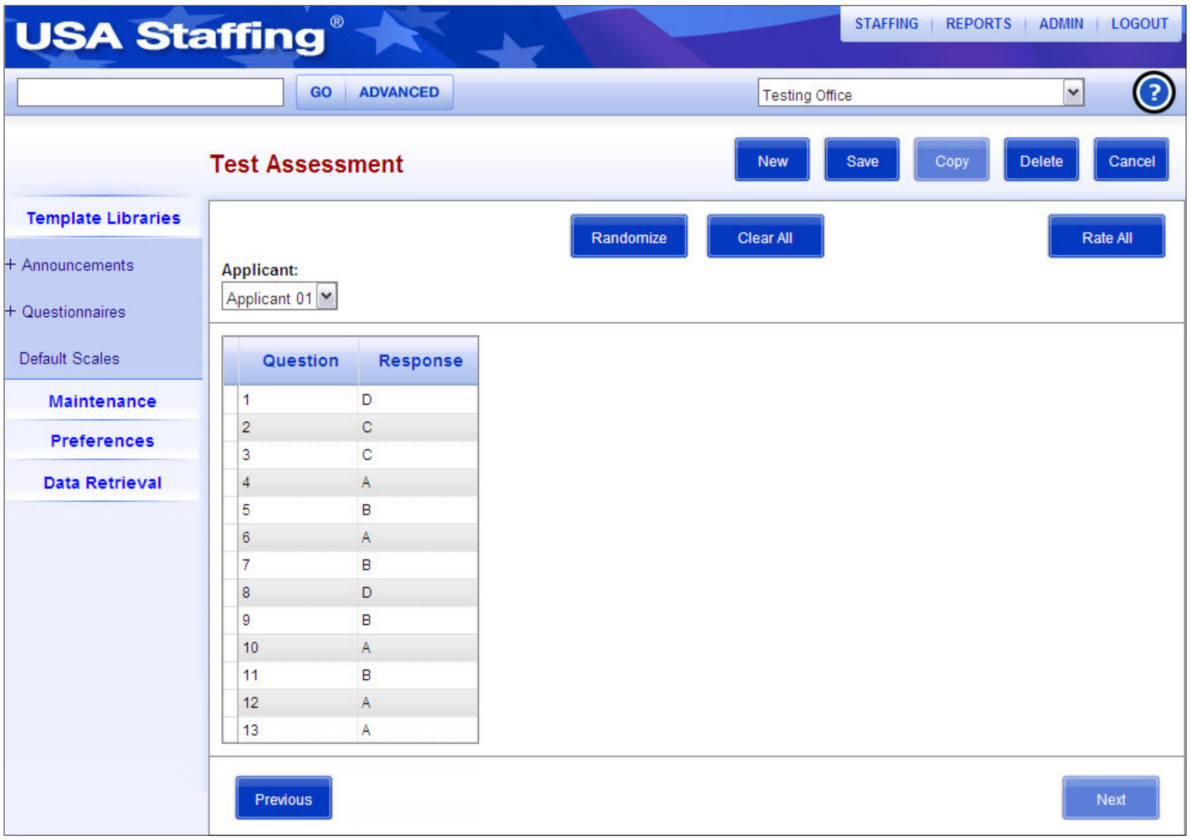
Follow these steps to complete the test process:

- 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.

- Create more than one test applicant for each screen-out response scenario to ensure your assessment is working properly. 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 at the 9 and the 11, and perhaps a test applicant that is ineligible for the 9 and the 11 grade levels.

- Remember, 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 selection box.

- Click the Rate All button. The system will rate your test applicants and create a Test Rating Summary Report. The report will preview in a separate window. (If you do not see it, look for this page on the desktop toolbar.)

Below is an example of the Rating Summary Report with two test applicant records.

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

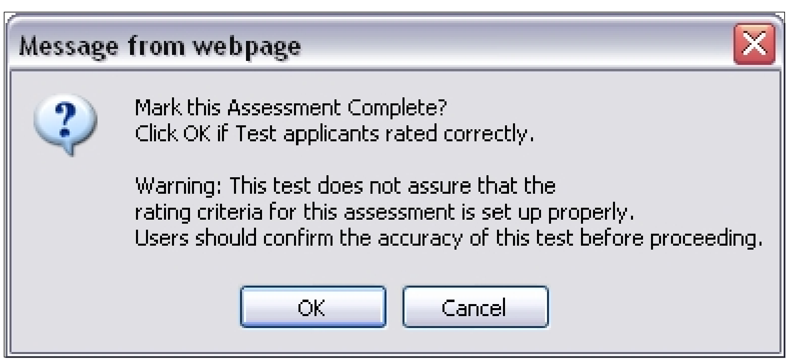
Specialty Code	Grade	Raw Score	Final Rating	Min Quals Rating
001	07	0		IE
001	09	0		ID
001	11	0		ID

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. 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.

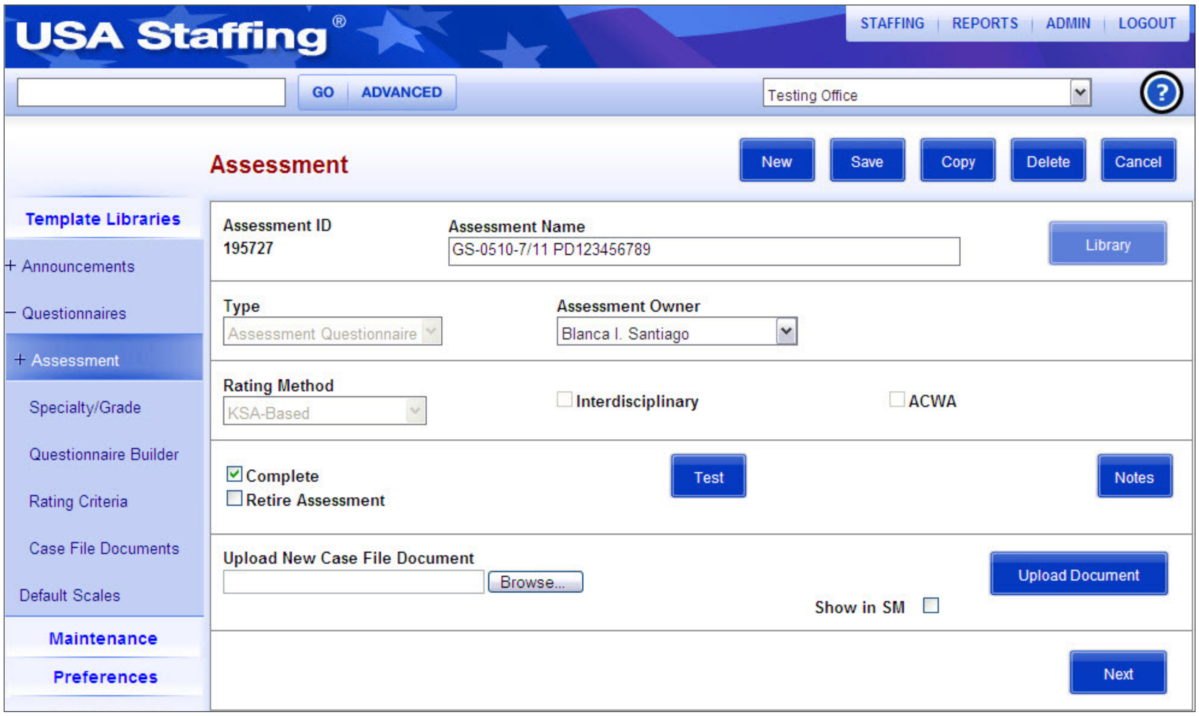
- When the test has run successfully, close the Preview screen and click the Next button. You will receive the dialogue box below.



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

Assessment

Once your assessment has successfully been tested, you will be 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 Complete check is removed, you must re-test the assessment.



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

Import Document in Questionnaire Builder

If you prefer to work with a word processor, you can create the questionnaire text in Notepad or Word and import the document into the system. This way team members and/or subject matter experts (SMEs) can draft questionnaires 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 in a single file.

- The file must be saved in plain text file format with the UTF-8 Encoding option selected.
- Each part of your questionnaire text document must be preceded by an identifier placed at the start of a line with a hard return. This must also be on the first line of your text file so that USA Staffing knows what it is. You can find a sample assessment text file in Appendix B.
    - Precede each competency/factor with "FACTOR:"
    - Precede each set of instructions with "INSTRUCTIONS:"
    - 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.

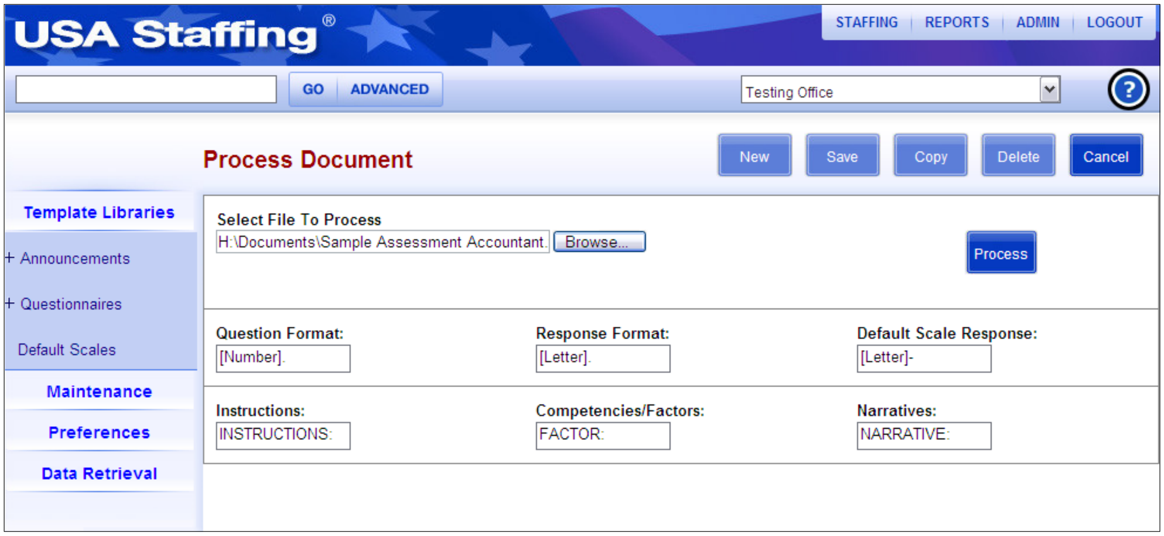
If you want to add instructions before the default scale, insert INSTRUCTIONS: and then the instructional text.

- Question Type Items. Precede each question item with a number followed immediately by a period, then one or more spaces and the text.
- Custom Responses. Precede each response item with a capital letter followed immediately by a period, then one or more spaces and the response text.
- For an example of a properly formatted import document, see Appendix B.

To import a document, follow these steps:

- Click the Import Document button on 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 click the Browse button and follow the dialogue instructions. (See a sample text file in Appendix B.)



- 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.

- Click the Save button.

- Continue to work in Questionnaire Builder or click the Next button to go to the Rating Criteria page.

Case File Documents

This page is where you can upload documents, such as supporting assessment templates and rating materials. 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 assessment template to which the document is associated.
- **Added By.** This is the full name of the USA Staffing 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. The note(s) will be included with the case file document in the Case File Documents page of the Vacancy section when the assessment template is selected.
- **Show in SM.** When this box is checked, the system is set up to send a copy of the case file document and accompanying notes to Selection Manager when the template is used in a vacancy and a certificate is issued.

- **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 USA Staffing 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.
- The Link New Case File Document to field defaults to Assessment. This field is inactive (grayed out).
- 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.

Note: When the Show in SM box is checked, the case file document and accompanying note(s) will display in Selection Manager when the template is used in a vacancy and a certificate is issued and sent.

Default Scales

When you are creating a questionnaire in the Questionnaire Builder, you can use any existing default scales you see in the Template Libraries. Available scales appear in a drop-down list on the Item Editor page of the Questionnaire Builder.

Depending on your permission profile, you may be able to create or edit default scales that can be used by others in your Office, or across your Organization. Only OPM users in the USA Staffing Program Office can create or edit default scales at the System level.

When users are creating questionnaires, they can use any of the default scales. The system copies the scale into the questionnaire.

At that point, the user can modify the scale, but the changes made while working on a questionnaire in the Staffing area pertain only to the questionnaire in which they are made. The original remains unmodified in the Template Libraries. To modify the default scale in the Template Libraries, you must have the appropriate permission profile, and you must make the modifications in the Template Libraries in the Administration area.

The default scales in the Template Libraries do not have rating criteria (points) assigned to them. You must assign the points on the Rating Criteria page after you select the default scale while you are working on the Questionnaire Builder.

To get to the Default Scales page, do the following:

- Click the Administration button at the top navigation bar.
- Click the Template Libraries button on the left menu bar.
- Select Default Scales under Template Libraries.

When you first arrive at the Default Scales page in the Template Libraries, the tree view display of all the existing scales will be collapsed and show only the three levels at which default scales are managed in three categories:

- System. Templates stored at this level are available to all users when they are creating questionnaires. These templates can only be created, modified, or deleted by OPM staff in the USA Staffing Program Office.

- Organization. Templates stored at this level are available to all users in the same Organization and all Offices of the Organization.

- Office. Templates stored at this level are available to all users in the same Office only.

To create a default scale, do the following:

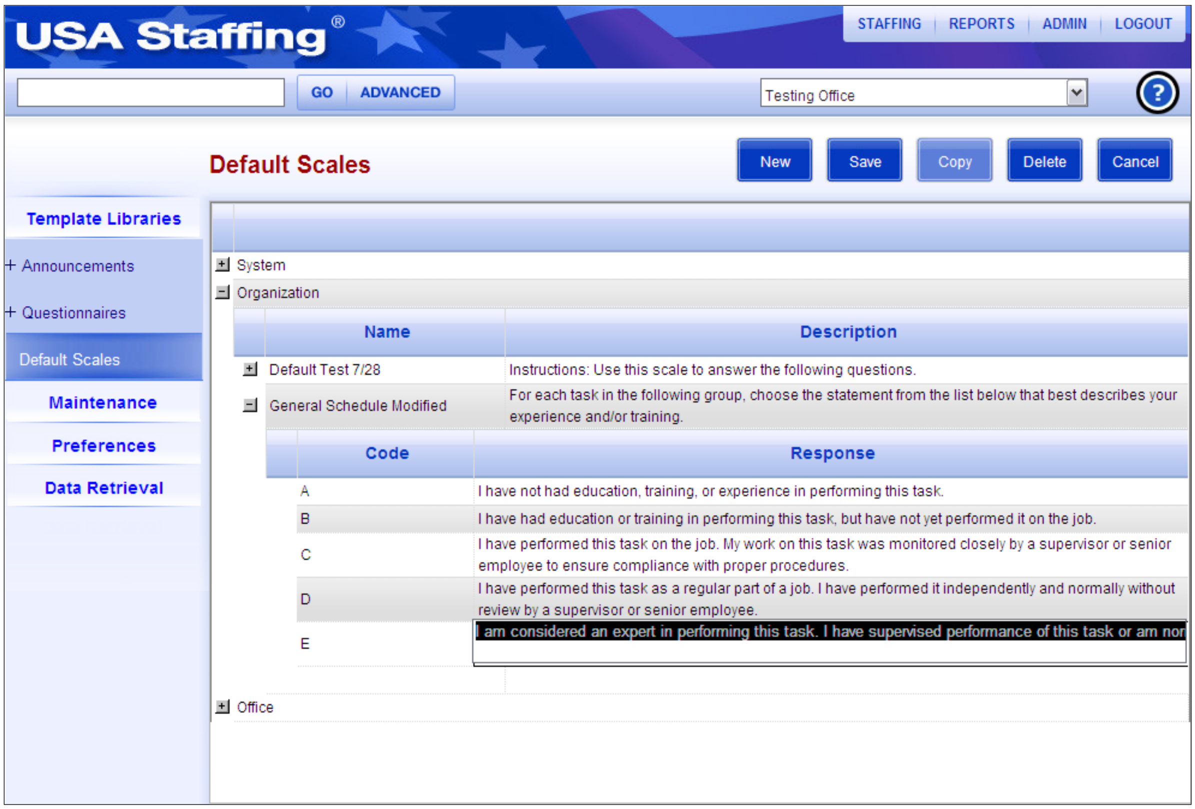
- Select the category where you want to add the scale. (Remember that only OPM staff in the USA Staffing Program Office can select the System category.) The cell will have a slightly darker border when it is selected.

- Click the New button. Two rows will be added: one for Name and Description and one for Response.

- Select each of the Name, Description, and Response cells and type the appropriate information needed.

To modify a scale, do the following:

- Double-click the cell you want to modify.
- Type the new content for that cell.
- Repeat the first two steps for any other cells you want to modify.
- Click the Save button.



To delete either an entire scale or a response, do the following:

- Select the row you want to delete.
- Click the Delete button, and click OK to confirm.
- Repeat the first two steps for any other rows you want to delete.
- Click the Save button.

Check Your Skills – Create an Announcement Template

Take 30 minutes to practice creating a new announcement template.

Create an announcement template for your office by doing the following:

1. Click the Administration button.
2. Click the Template Libraries button.
3. Select Announcement.
4. Click the New button.
5. Give your announcement template a name.
6. Write down your announcement template name: ____
7. From the Template level drop-down list, select Office.
8. Click the Image Based Form drop-down list and select Form: 1203-FX. A list of possible required items from the applicant will appear at the bottom of your screen. As a default, each item will have a checkmark.
9. Review this list of possible requirements and delete or keep the checkmarks as appropriate.
10. Click the Next button to go to the Overview page.
11. Enter the Overview statement.
12. Click the Save button.
13. Select Duties.
14. Enter the duties in the Text Editor box.
15. Click the Save button.

Check Your Skills – Create a New Assessment Template

Take 30 minutes to practice creating a new assessment template.

Create a new assessment template for a multiple-grade vacancy by doing the following:

1. Click Administration on the top navigation bar.
2. Click the Template Libraries button.
3. Select Questionnaire.
4. Select Assessment.
5. Click the New button.
6. Enter the assessment name in the text entry box.
7. Make a note of your Assessment ID: ____________________
8. Click the Save button.
9. Click the Next button. On the Source Information page, click in the box before "Classification and/or qualification standards" and select PRINCIPAL.
10. In the Remarks box enter (type) "This is a GS-201-9/11 training assessment to be used only for training."
11. Click the Next button again. You will now be on the Specific Info page.
12. Check the box next to "A description of how the importance of this job information was determined."
13. Click the Next button again. You will be on the Preparation page.
14. On the Preparation page, for the purpose of this exercise, select any one of the four displayed items.
15. 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.
16. Select Specialty/Grade on the left menu bar.
17. Click the Series button at the top of the page.

18. Select the series from the drop-down list.
19. Click the Specialty button and enter the specialty.
20. Click the Grade button and enter the grade.
21. Click the Grade button and enter the second grade.
22. Click the Next button to go to the Questionnaire Builder page.
23. Create your questions by importing a document. Ask the Instructor for the file name and path.
24. Add Factors and Items.
25. Click the Next button to go to the Rating Criteria page and see the factors.
26. Select Rating or Screen-Out for each factor, as appropriate.
27. Click the Save button.

Share your thoughts with the class on challenges.

Maintenance

- Customer Maintenance
- Customer Edit in Customer Maintenance
- Contacts in Customer Edit
- User Maintenance
- User Edit in User Maintenance
- Office Maintenance
- Permission Profiles
- Standard Permission Profiles
- Permission Profiles: An Overview for Users
- Workgroup Maintenance

Customer Maintenance

If your permission profile gives you access, you can use the Customer Maintenance pages to add new customer records, view, edit, or delete information about customers and contacts.

To access the Customer Maintenance page, do the following:

- Click the Administration button on the top navigation bar.
- Click the Maintenance button on the left menu bar.
- Select Customer Maintenance.

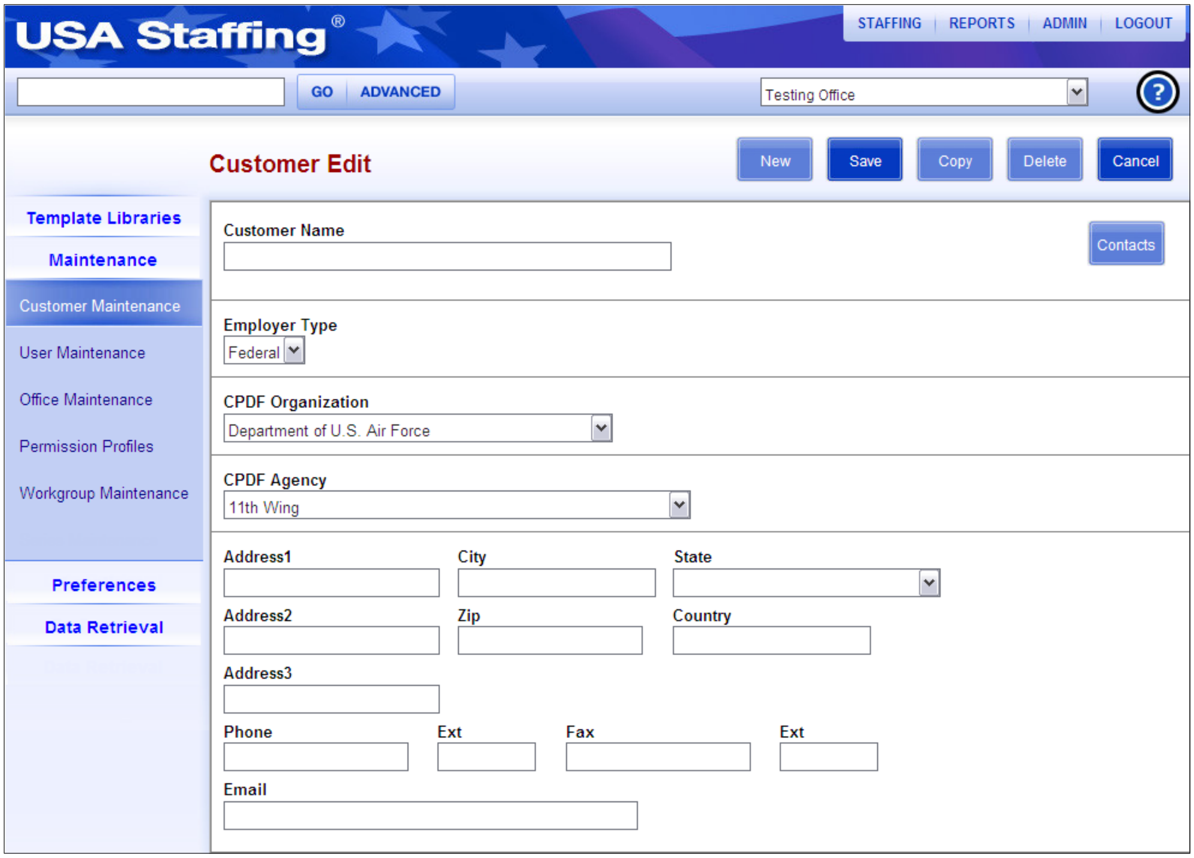
This page lists all customer records for your Office.

Note: Customers are not individuals; they are components or offices within your organization or agency.

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

- Open a customer record by selecting the customer's name.
- Create a new customer record by clicking the New button.
- Edit an existing customer record, including adding or changing contact information.
- Delete a customer record not associated with a VIN.

Customer Edit in Customer Maintenance



When you click the New button or the customer's name while you are on the Customer List page, the Customer Edit page opens.

To create or modify a customer record, do the following:

- In the text entry box under Customer Name, enter the name of the customer as you want it to appear in the system.
- Choose the appropriate Employer Type. It defaults to Federal.
- Select the appropriate designations that identify the agency from the CPDF Organization and CPDF Agency drop-down lists. These selections will work with USAJOBS to place any announcements using this customer under the appropriate organization/agency when posted to the Web site.
- Fill in all applicable Address fields that pertain to the customer record.
- Click the Contacts button to view or modify contact records associated with the customer record you have displayed.

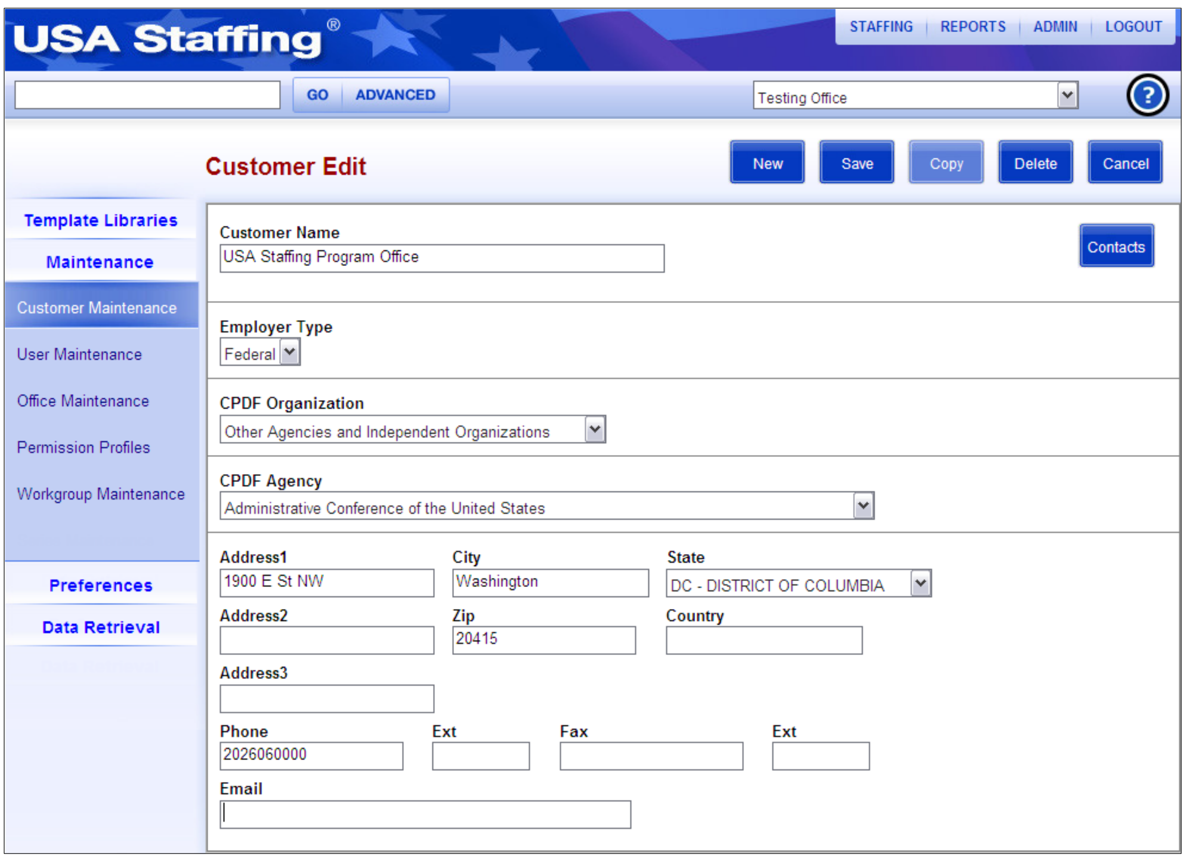
Note: There may be different addresses and phone numbers for each contact you add, so it is possible for you to have contacts whose addresses differ from the address in the customer record.

- Click the Save button.

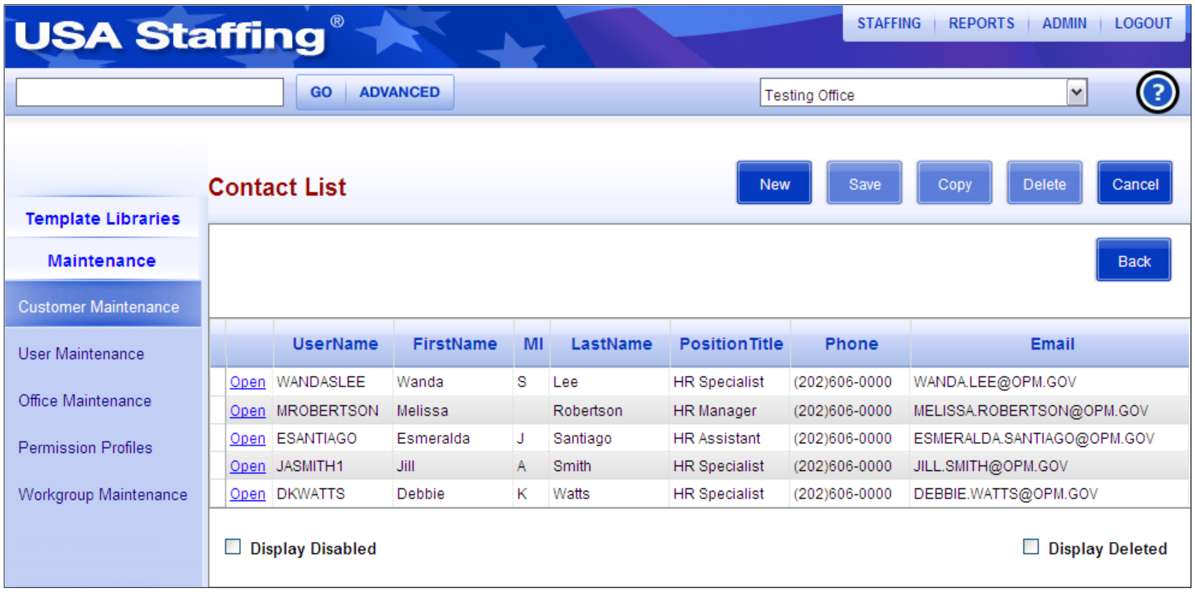
Contacts in Customer Edit

Contacts are individuals who are associated with customers. Contacts can be assigned to more than one customer. A contact can be assigned to a specific request in the Referral area and receive the certificates electronically. Contacts assigned to a Request will receive an email with the link to Selection Manager where they will be able to view, print, and make selection decisions.

Note: USA Staffing does not allow for duplicate USA Staffing or Selection Manager accounts. Please check that an account does not already exist for the contact before creating a new one.

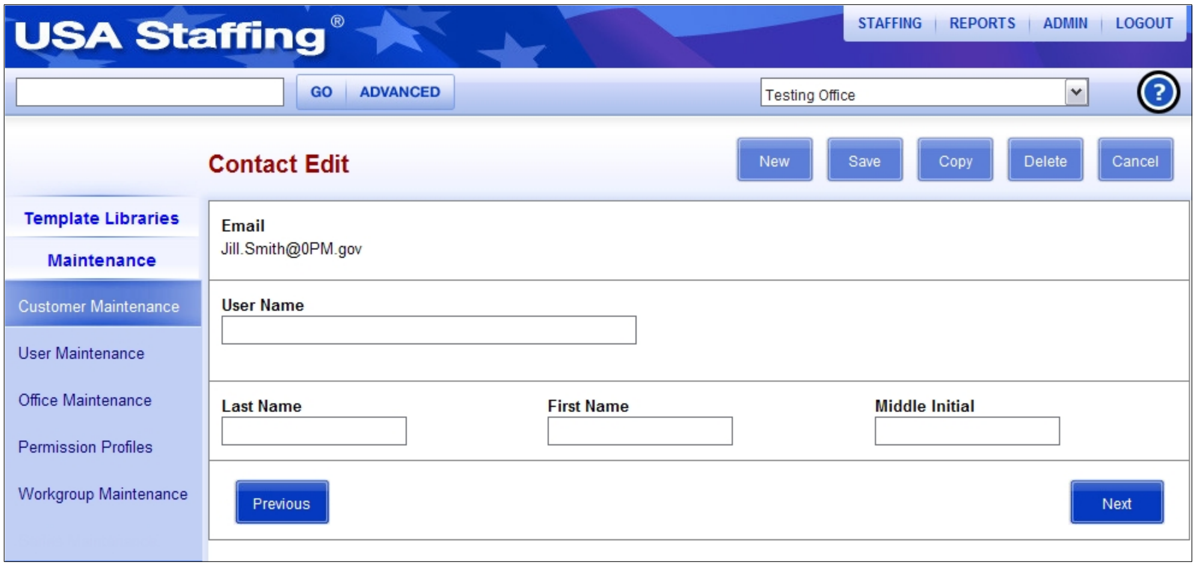


- Within the customer record select the Contacts button in the upper right corner of the screen. The page will refresh to display the Contact List (all contacts) for that customer.

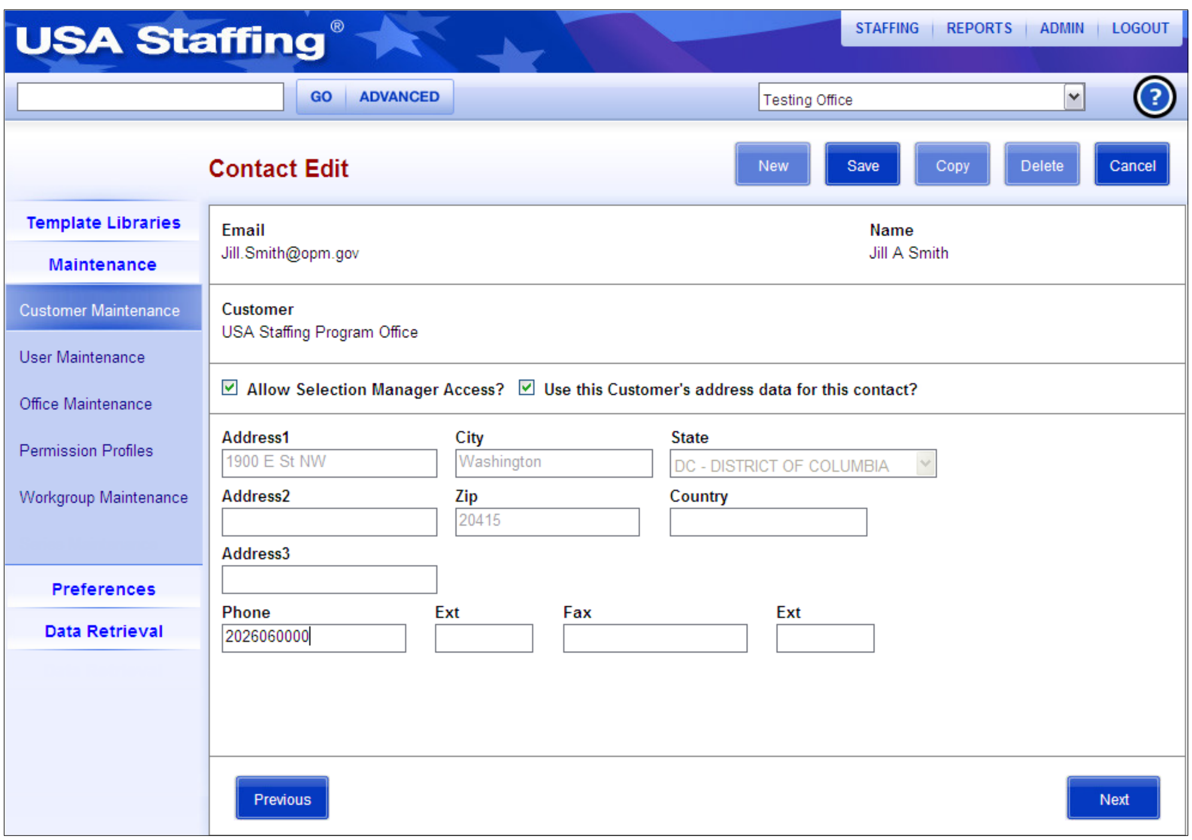


- Click the New button on the Contact List page.

- Enter the contact's email address and check the Allow Selection Manager Access? box.
- Click the Next button.
- When the Next button is selected, the system verifies this email address has not been previously used to create a contact account. If no account exists, the next page will display the email address and ask for the user name and the contact's full name.

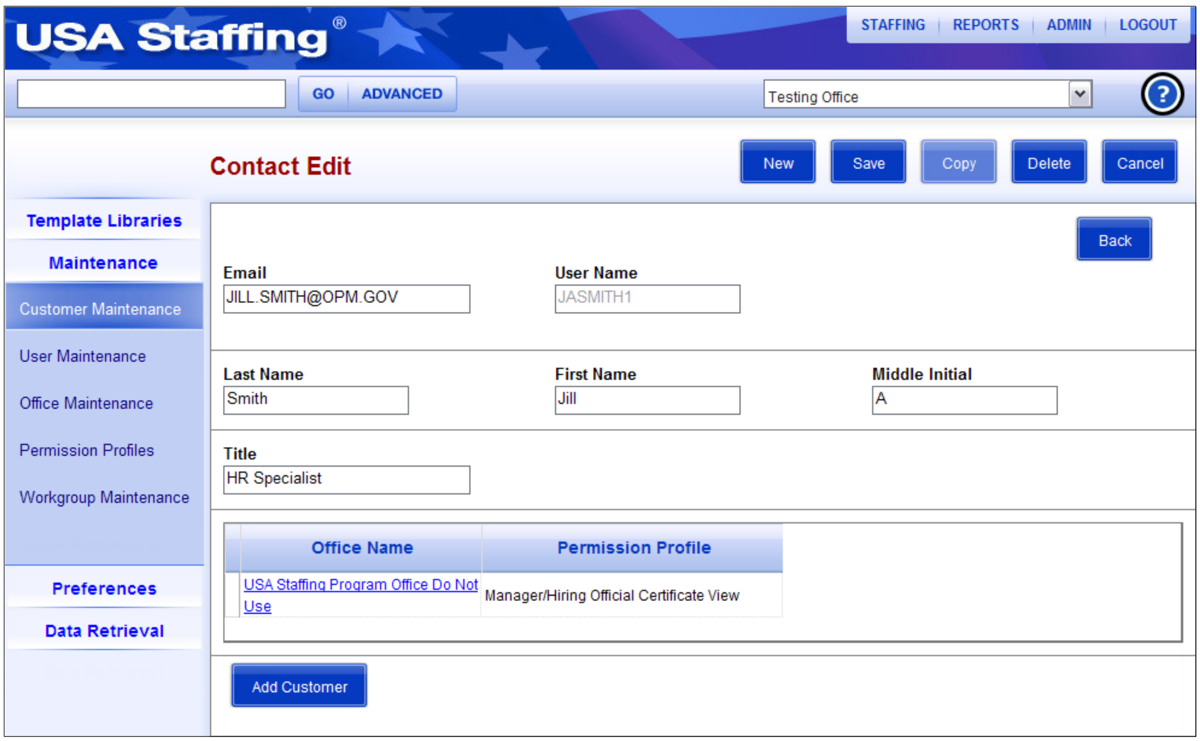


- Enter the user name.
- Enter the full name of the contact: last, first, and middle initial if applicable.
- Click the Next button.



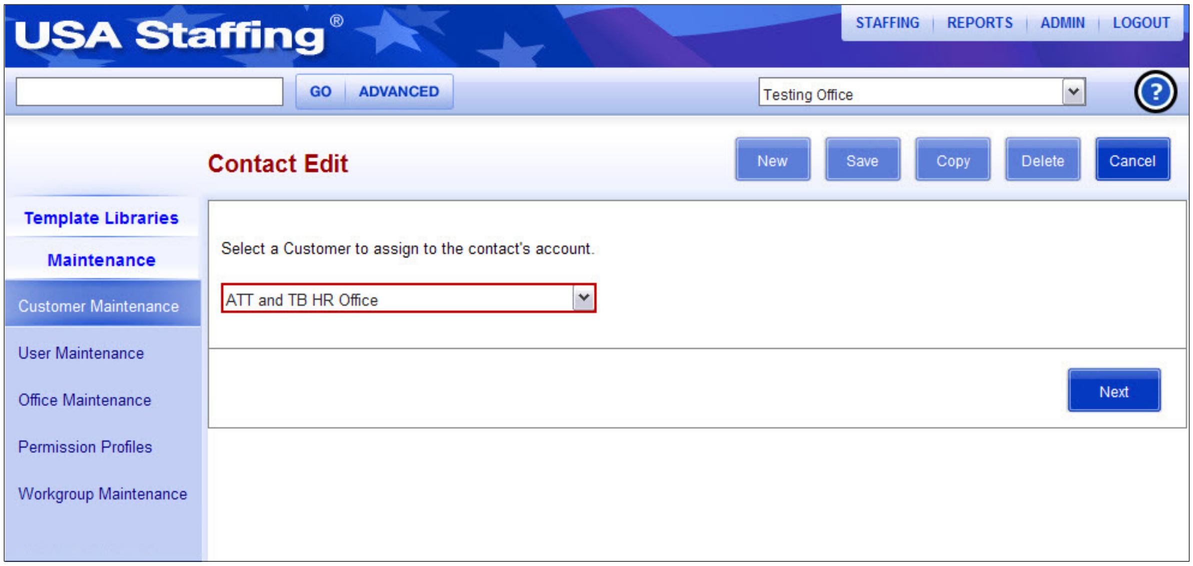
- Enter the contact's phone number.

- The contact should have Selection Manager access. This access is granted by checking the Allow Selection Manager Access? box.
- Ensure that the customer’s address is appropriate for this contact. If the Use this Customer’s address data for this contact? box is unchecked, the address fields will be enabled to allow edits.
- Click the Next button.
- The Contact example below shows the contact as assigned to the Automated Systems Management Branch customer. The contact’s position title can be added on this page.

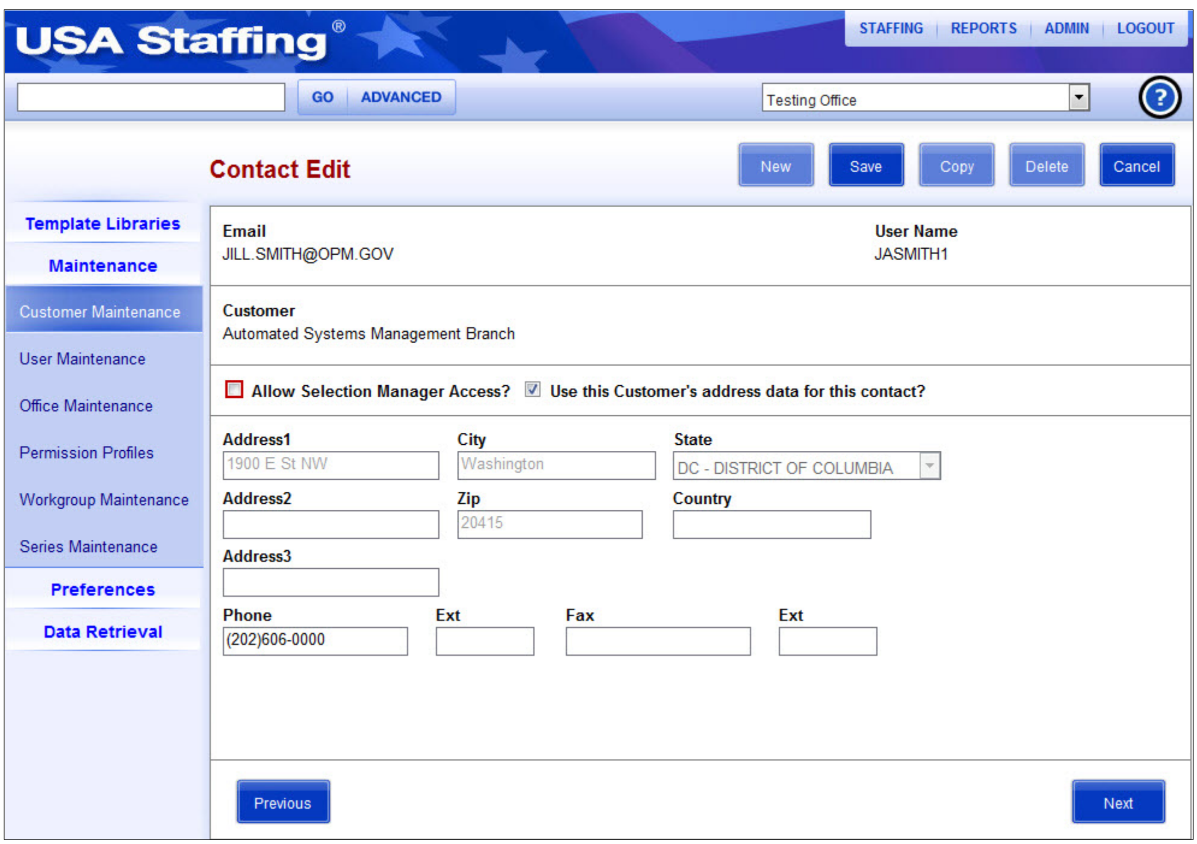


The contact can be assigned to more than one of your customers.

- Click the Add Customer button to assign another customer to this contact.



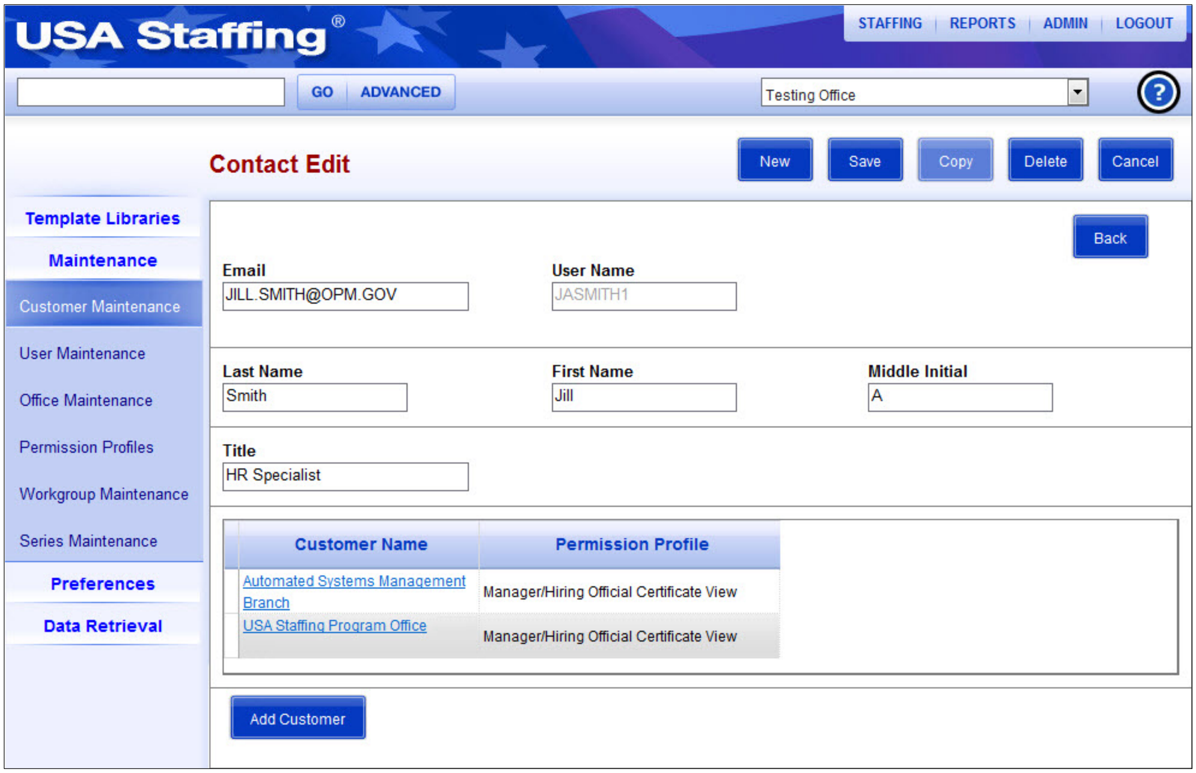
- Select the customer from the drop-down list. Click the Next button.



- Check the Allow Selection Manager Access? box.

- Leave the Use this Customer's address data for this contact? box checked, or uncheck this box to enter a different address.

- Click the Next button.



Second customer is assigned to contact's record.

This contact will be able to receive certificates when the customer assigned to this contact's record is assigned to a VIN, i.e., Automated Systems Management Branch and USA Staffing Program Office. If the customer is utilized, then the contact can be assigned on the Request Information page. Once the certificate is issued and status is changed to Sent to Customer, this contact will receive an email notifying them that the certificate is ready for their review. When a new contact is assigned to a certificate for the first time, they will receive a system-generated email notifying them that a certificate is available for their review. This email will contain their user name and URL to log into Selection Manager. However, the first time they log in, it is important to explain the procedure and provide the necessary login related information. A Hiring Manager quick-start guide is also available on the Selection Manager log-in page.

HOT TIP! USA Staffing inactivates customer contacts' access if they have not logged into the system in 365 days as of October 8, 2011. Access is removed on the 366th day of inactivity. Customer contacts can be reactivated by recreating their account.

User Maintenance

The User Maintenance page stores the records of all users within your organization as well as those of USA Staffing support personnel. On this page you can view and modify information in user records within your organization, as well as manage the permissions levels of users. The extent to which you can view, add, modify, and delete users and their permission profiles depends on your permission profile.
Users can make limited changes to their own records, including changing their passwords.

To get to the User Maintenance page, do the following:

- Click the Administration button on the top navigation bar.
- Click the Maintenance button on the left menu bar.
- Select User Maintenance.

The User List page shows all users for your Organization.

The following functions are available on this page:

- **New.** Click this button to add a User. This will take you to a blank User Edit page, so you can enter the required information.
- **Open.** To modify a User Record, select the letter of the last name for which you are searching. User names are listed, alphabetically, by last name. Click the Open link to the left of the user name you want to modify. This will take you to a User Edit page where you can modify the user’s information.
- **Display Disabled.** By default, the User List only shows users who are active. To display users whose accounts have been disabled, select the Display Disabled check box.
    - o Users may be disabled (temporarily) if they have attempted too many unsuccessful logins.

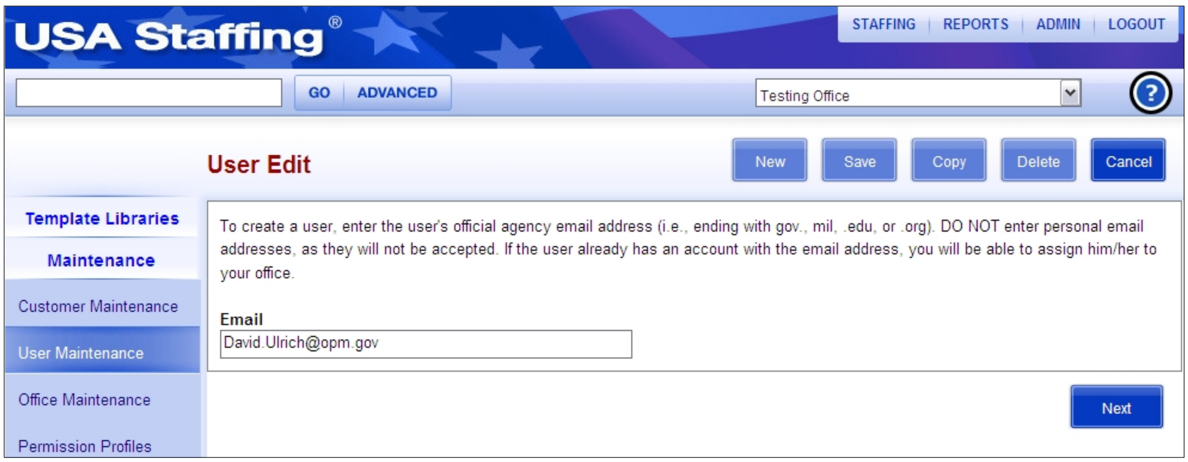
- **Display Deleted.** To display users whose records are marked for deletion, select the Display Deleted check box.

Note: Individual user records are not permanently deleted if the user is associated with any VINs, assessments, or certificates previously issued. Once a user record is deleted, that frees up that license key to be used with another user.

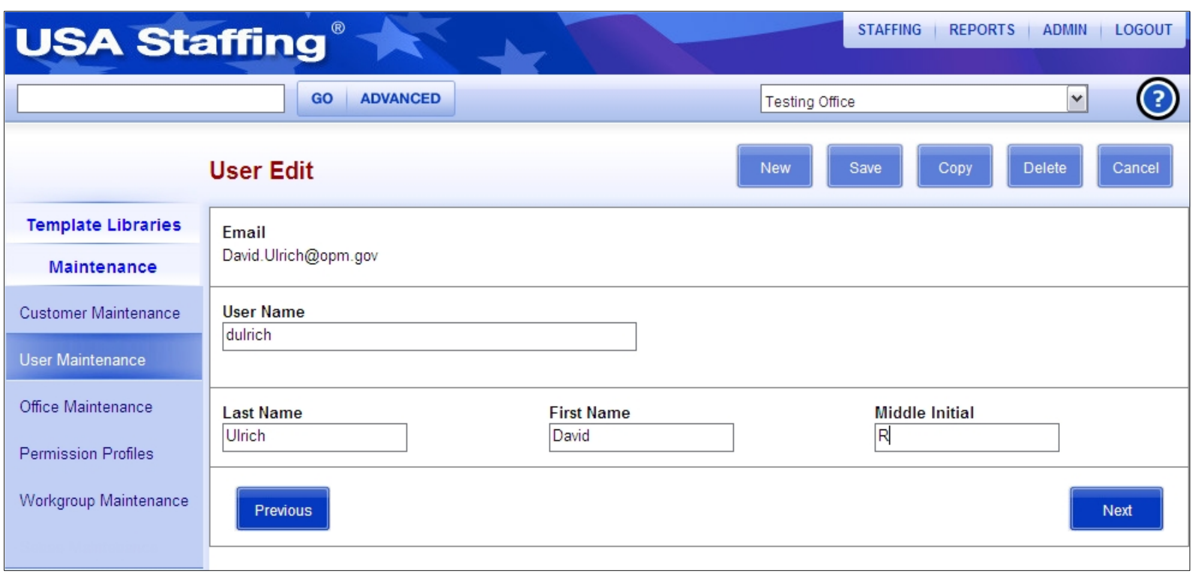
User Edit in User Maintenance

To create a new user account:

- Click the New button at the top of the User Maintenance (User List) page.



- Enter new user’s email address.
- Click the Next button.



- Enter the user name.

To create a new user account, you must create a user name according to your agency's guidelines. The following rules are typically applied when creating user names:

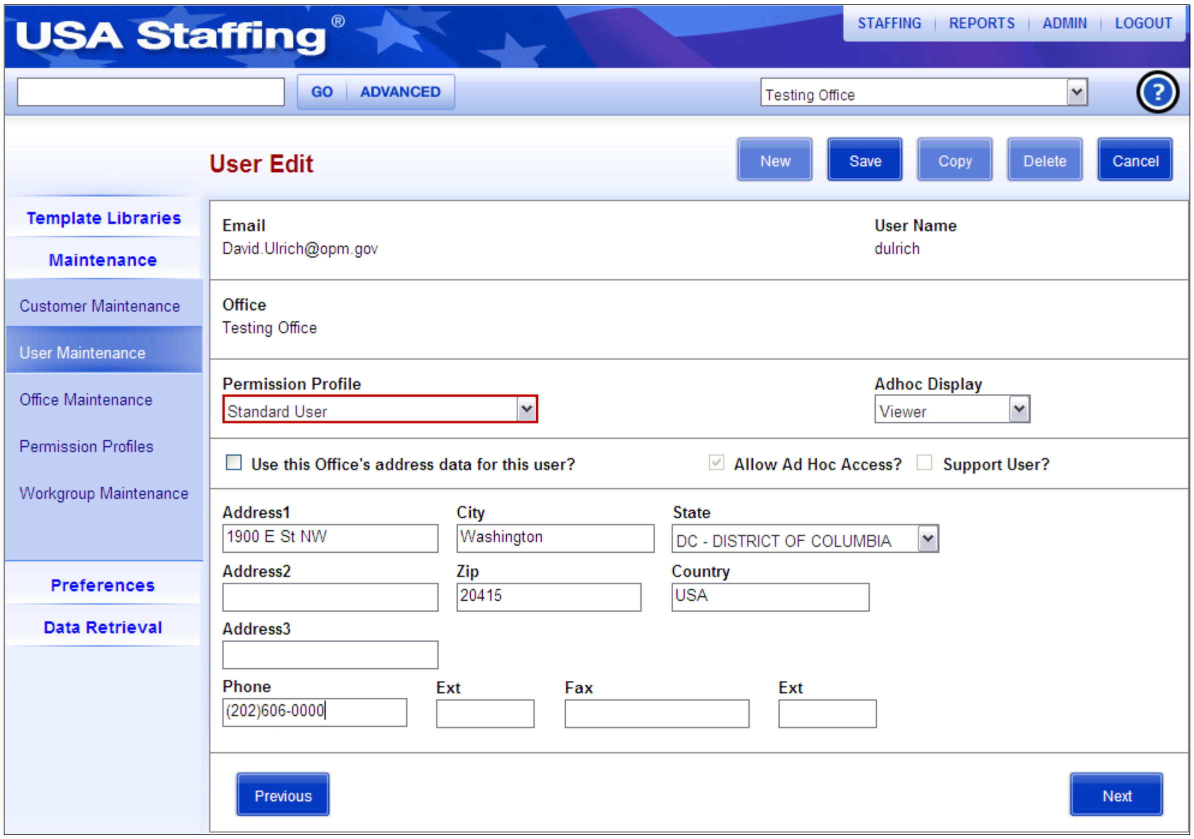
- First initial, middle initial, followed by the first eight characters of your last name, for a maximum of 10 characters; for example, JTJOHNSON.
- Enter the last name, first name, and middle initial, if applicable. Write user names in sentence case (first initial capitalized with the following letters in lower case). DO NOT USE all CAPS or ALL lowercase. For example, Smith, Jill is correct; SMITH, JILL and smith, jill are not.
- Click the Next button.

- Assign the license to the appropriate office. If you have more than one office in your organization, those offices will be listed.

When entering new user records, it is important to properly select the license key. If your office is part of a larger organization using the system, you will see multiple offices in the Available Licenses drop-down list. The drop-down list defaults to the first office, alphabetically.

Note: Ensure you assign all new license keys to the appropriate office.

- Click the Next button.



- Assign the Permission Profile. Make selection from the drop-down list. This list will display all system profiles and any created at your organization or office levels.

- Select Adhoc Display. Options are No Adhoc Access, Viewer, and Plus.

- Use this Office's address date for this user? The purpose of this section is to specify which address to use when contacting the user. You have already assigned the user to at least one office, perhaps several offices. Now specify the address to use for contacting the user.

  - To specify an address other than one of the offices to which you assigned the user, do the following:

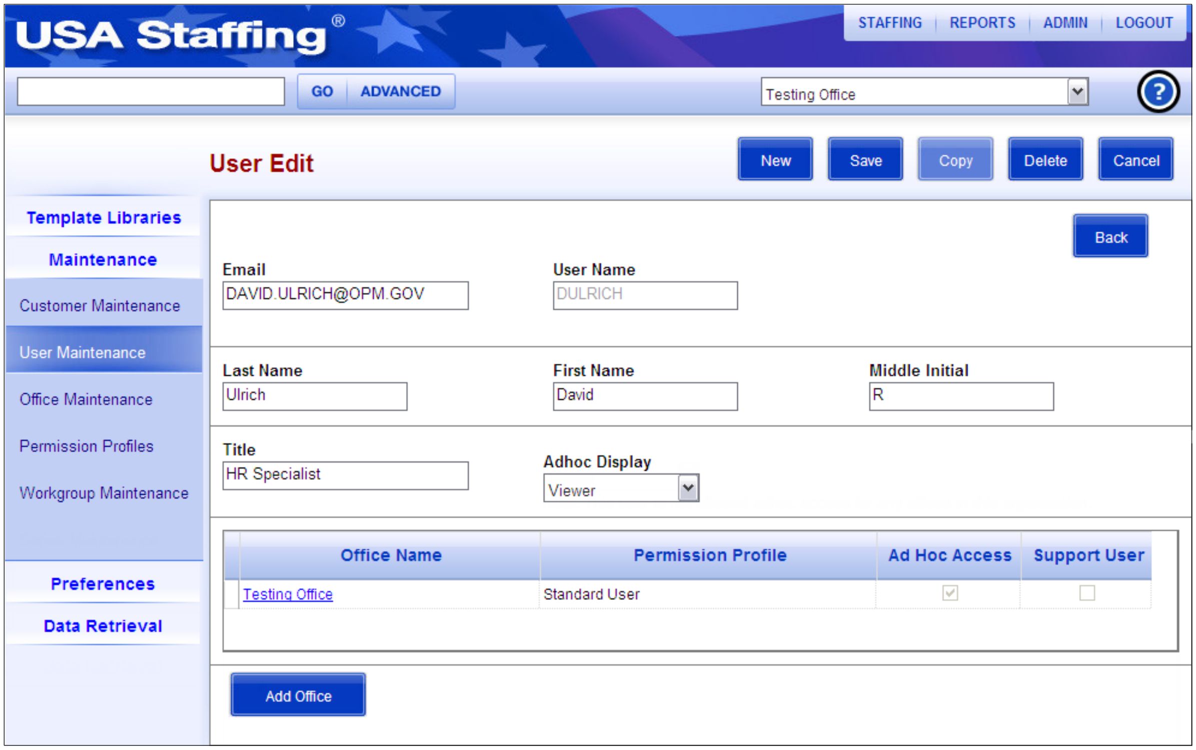
    - Uncheck the Use this Office's address data for this user? box.

    - This will allow you to edit the form. If the address information is already present, you can modify it. If the form is blank, type in the information.

- If Viewer or Plus Adhoc Display is assigned, click the Allow Ad Hoc Access? check box.

- Enter user's phone number. The phone number is important as this screen is often used by support personnel to find a user's contact information. The email address and phone number will also display in the announcement when this user is selected as an external contact.

- Click the Next button.



- Enter new user's title.

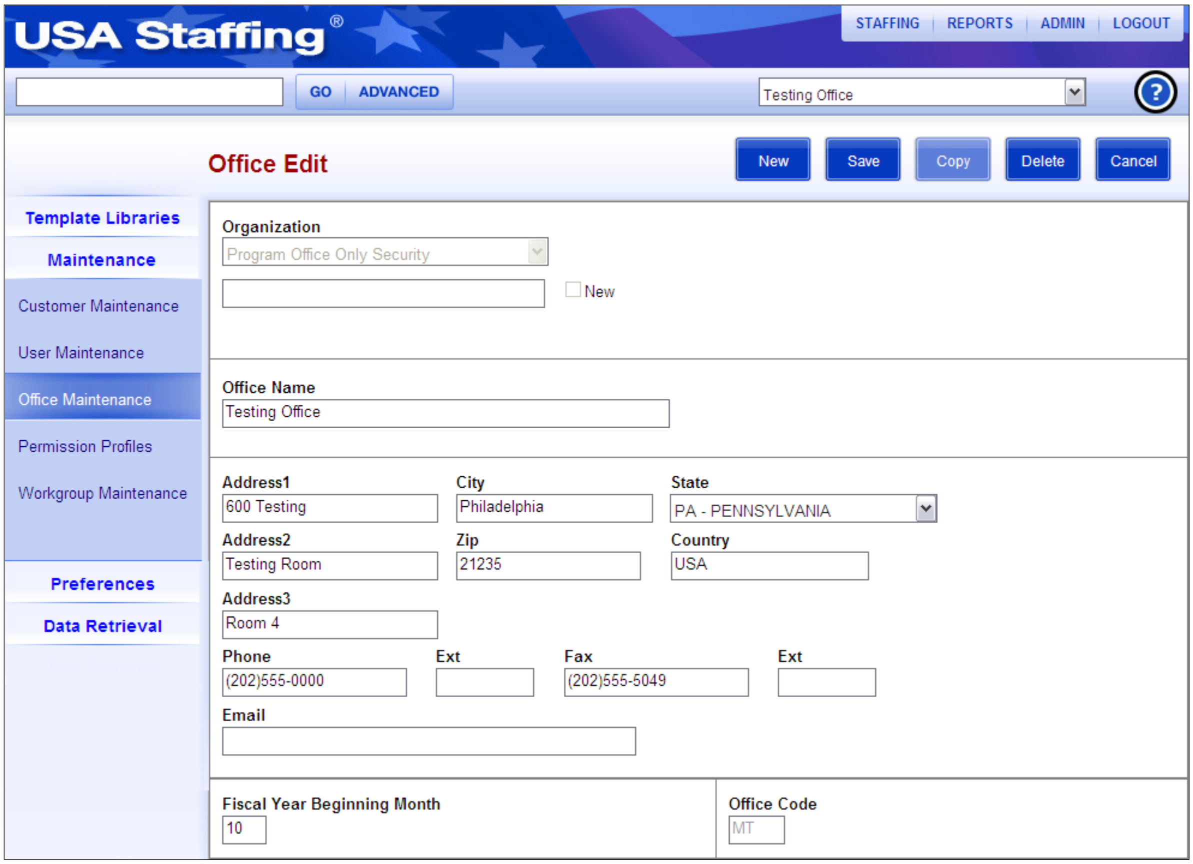
- Click the Add Office button to assign additional access to this user's account if appropriate.

- Provide the new user with their user name. The first time a new user accesses the system they will be required to use the Forgot Password link on the login page to create a password.

HOT TIP! USA Staffing inactivates users' access if they have not logged into the system in 90 days. Access is removed on the 91st day of inactivity. Inactivation occurs at the System level. This process does not affect support users. Users can be reactivated by recreating their account.

Office Maintenance

Each organization that uses USA Staffing may have multiple offices, and each office will have its own record that contains the office's address, phone, fax, email information, and office code. The phone, fax, and email fields are not required.



To get to the Office Maintenance page, do the following:

- Click the Administration button on the top navigation bar.
- Click the Maintenance button on the left menu bar.
- Select Office Maintenance.

The Office address, phone, and email information entered on this form will be used on system output that includes or requires a return address, such as:

- Notices of Results sent to applicants
- Notification Letters sent to applicants
- Benchmark reports

- User-initiated Correspondence Letters, Cancellation Letters, or Disposition Letters
- Automatically generated correspondence
- Assessments

Permission Profiles

When adding users to USA Staffing, you must assign them a permission profile. The permission profile selected controls what areas that user can access and/or modify.

Only users with Organization or Office level permission are able to perform the task of assigning permission profiles.

Standard Permission Profiles

To get started, you can simply assign each of your users to one of the standard system permission profiles. You can add new profiles that give you more flexibility once you understand the system functionality and the capabilities/limitations of the standard profiles.

The standard permission profiles built into USA Staffing are the following:

ORGANIZATION ADMINISTRATOR Intended for primary person or persons in Agency or Organization who oversee USA Staffing use across entire organization; has unique rights as Administrator at the Organization and Office levels to establish other users, manage all options affecting entire Organization, and manage templates throughout Organization.	
PARAMETERS	
Selection Manager:	No Access
Applicants:	Organization Access
Assessments:	Questionnaire Template Developer
Customer:	Office Access
Office:	Organization Access
Permission Profiles:	Organization Access
Preferences:	Organization Access
Referral:	Certificate Access
Templates:	Organization Access
User:	Organization Access
Vacancy:	Organization Access

OFFICE ADMINISTRATOR Intended for primary person or persons in an Office who oversee USA Staffing use across entire Office; has rights as Administrator at the Office level to establish other Users, manage all options affecting entire Office, and manage templates throughout Office.	
PARAMETERS	
Applicants:	Organization Access
Assessments:	Questionnaire Template Developer
Customer:	Office Access
Office:	Office Access
Permission Profiles:	Organization Access
Preferences:	Office Access
Referral:	Certificate Access
Templates:	Office Access
User:	Office Access
Vacancy:	Office Access

STANDARD USER For typical users. Has access a fully trained user would typically need and want in order to perform all normal staffing functions at the full performance level.	
PARAMETERS	
Selection Manager:	No Access
Applicants:	Organization Access
Assessments:	Questionnaire Template User
Customer:	Office Access
Office:	Office Access
Permission Profiles:	View Only Access
Preferences:	Office Access
Referral:	Certificate Access
Templates:	Office Access
User:	View Only Access
Vacancy:	Office Access

Permission Profiles: An Overview for Users

Below is some information about permission profiles for users.

Definition. A permission profile is a set of permissions that control access to system areas. It can be applied to a group of users.

Standard Permission Profiles. USA Staffing comes with the following system-level permission profiles:

- The Organization or Office Administrator profile conveys very broad access to all parts of USA Staffing, including global features that affect the entire organization or office and the ability to manage the permissions of other users.

- The Standard User profile is intended for most users who work in USA Staffing to perform routine examining work.

- The Standard User - Limited Access profile is intended for users who work in USA Staffing to perform routine examining work but that are not authorized to change assessment questionnaire responses in applicant records. Users with this permission level can still review and update applicant information.

- The Manager/Hiring Official Certificate View (Selection Manager) profile provides limited permissions to managers and their assistants who will be accessing Selection Manager to review qualified candidates who are referred to them.

Why Permission Profiles Are Important. All users are assigned a permission profile. If you have permission to connect to another office, you can work with its data; you will also have a separate permission profile there. The permission profile controls what you can do in USA Staffing.

Your Permission Profiles. Your USA Staffing Administrator can tell you which permission profile is assigned to you for each office to which you are assigned. Users cannot view or edit their own permission profiles. Once you are told the profile name, you can see what permissions are part of your profile by consulting the Permission Profiles page. To get there, click the Administration button on the top navigation bar. Then select Maintenance and Permission Profiles on the left menu bar.

How Permission Profiles Are Managed. Users who have permission profiles that include settings for the Permission Profiles page are at either the Organization or Office level and can create new profiles. They can also change existing offices' profiles or add ones other than the standard profiles built into USA Staffing. Standard system level profiles are controlled by the USA Staffing Program Office.

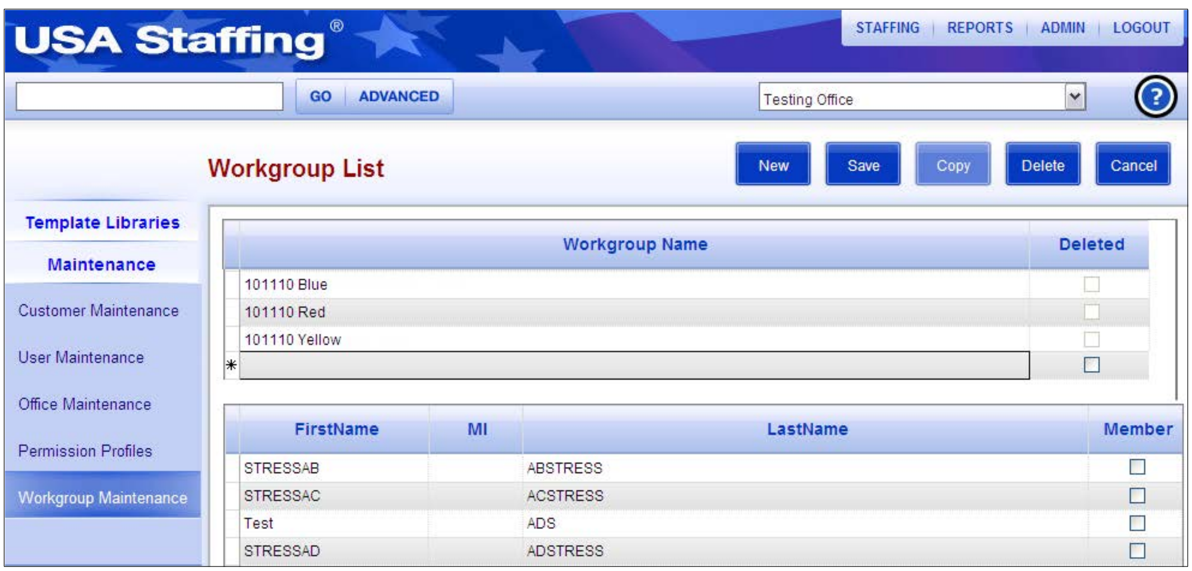
Workgroup Maintenance

Instead of assigning all of the work in USA Staffing to individuals, you can assign work to workgroups made up of any number of people. The Workgroup page is where you will assign individual to a workgroup. Individuals can only be assigned to one group at a time.

To add a workgroup, do the following:

- Click the New button to add a new row to the Workgroup List.
- Select the new row and type the name for your workgroup. The form will expand to show you a list of potential members.
- Place a checkmark in the Member box to add the named individual to the workgroup.
- Click the Save button.

The picture below lists all potential workgroup members. The list appears when you add a new row and type a name for your new workgroup. (See the second step above.) Workgroups are not required in USA Staffing.



Preferences

- Configurations
- Default Text
- Applicant Flags
- NOR Messages
- Category Rating Sets
- Manager Messages

Many processes in USA Staffing have default configurations or text. These options can be controlled at the Office, Customer, Vacancy, and, sometimes, Certificate levels. The global settings in the Administration area serve as defaults for your Office or Organization. If the preference is not applied at the Customer and Vacancy levels, the Office settings will be applied by default. This feature makes it possible for USA Staffing Administrators to control the global default settings.

It also gives individual users the flexibility to override the default settings for specific situations. For the Configurations and Default Text settings, the system will apply the information hierarchically according to the order below:

- Certificate
- Vacancy
- Customer
- Office
- Organization

For example, if the setting is at the Office level, you may make specific changes in the default text for a specific vacancy. Changes made to a specific vacancy will not override the default text at the Office level for other vacancies.

Configurations

The picture above shows the Configurations page. These are several actions you can take on this page.

Category. Choose from the selection menu under Category the process for which you want to modify the configuration:

- Applicants
- Archive

- Batch Print
- Correspondence
- Rating
- Referral
- Reports
- Selection Manager

Apply to Preference Level. Choose the level to modify:

- Organization
- Office
- Customer
- Vacancy
- Certificate

Item Description. The Item Description table gives you all of the configurable items for the category you selected. The black arrow in the first column of the table identifies the row for the item you have currently selected.

Value. The Value field always changes when you select a different row on the Item Description table of configurable items so that it reflects the type of response appropriate for the item selected on the table.

Set Preferences. To set preferences, do the following:

- Choose a category by clicking on the Category drop-down list and selecting on a category.
- Choose a preference level by selecting the Apply to Preference Level drop-down list and clicking on a level.
- If you select Customer or Vacancy, the system will present the Advanced Search page where you can search for the customer name or vacancy ID.
- Select the configurable item by clicking on its row on the table under Item Description.

Enter or select your desired value. (See Appendix F for Configuration Choices by Category.)

Default Text

The USA Staffing system provides default text for correspondence or documentation generated by the system. The defaults can be modified by those users with the appropriate permissions, as required by your Office or Organization.

The impact of these modifications will depend on the level at which they are made.

Note: Changes made at the Organization, Office, or Customer levels will NOT affect current VINs. You must make changes at the Vacancy or Certificate levels for an immediate effect. Changes made at the Organization, Office, or Customer levels will take effect when new VINs are created after the change has been made.

When new organizations start using the system, the Organization level settings are the basic setup configurations. Once settings are made to the Office level, the Organization settings are no longer applicable.

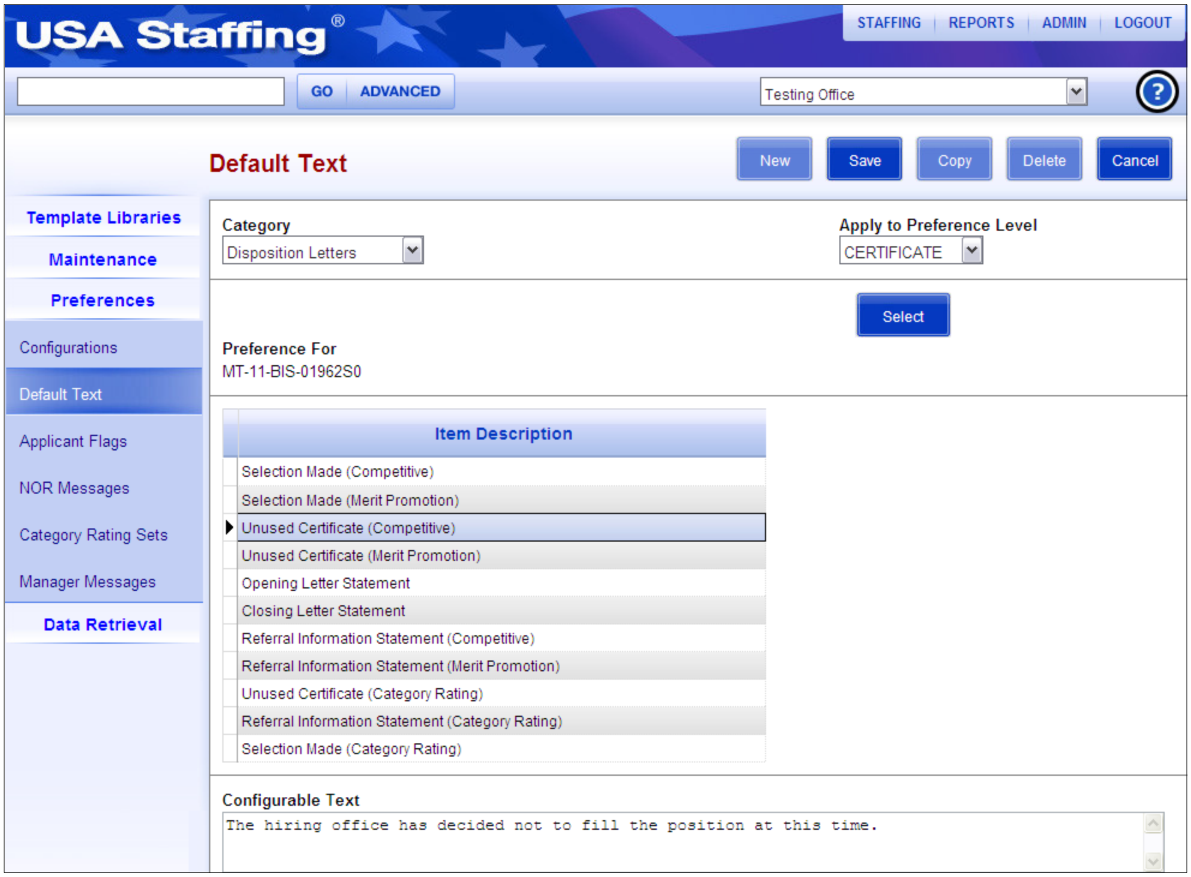
- Changes that you make at the Office level are applicable to this level only and will be the initial text for any new lower level component (Customer and Vacancy).
- Changes that you make at the Customer level are applicable to this level only and will be the initial text for any new lower level component (Vacancy).

- Changes that you make at the Vacancy level are applicable to this level only.

To change default text, do the following:

- Select the text document that you want to modify from the Category drop-down list. The text documents you can choose include the following:
    - Acknowledgement Email
    - Application Manager (You can customize the message on the Thank You page at the end of the online application.)
    - Availability Letters
    - Cancellation Letters
    - Certificate of Eligibles
    - Correspondence Text
    - Disposition Letters
    - Electronic Certificate
    - Geographic Availability Letter
    - Letters
    - Notice of Results
    - Notification Letter
    - Overdue Notices
    - Rating
    - Referral Letters
    - Welcome Page
- Select the Preference level from the drop-down list to which you want your text changes to be applied: Organization, Office, Customer, Vacancy, or Certificate. The Certificate level may not be available for all categories.

- From the table of configurable items (headed by Item Description), select the item you want to change. The current default text for your selection appears in the Configurable Text box below the table, on the bottom half of the page.



- Enter the appropriate text in the Configurable Text box.
- Click the Save button.
- Repeat these steps for each type of default text you want to modify.

Applicant Flags

Applicant flags are ways of flagging/marking individual applicant records. Applicant flags can highlight either a distinction or desirable attribute. Applicant flags are commonly used to indicate that an applicant is Pending Completion of Education or perhaps eligible for a special appointment authority.

If a flag has been set for a given applicant, it will appear in the following places:

- In the applicant record
- On the referral list or Certificate of Eligibles, along with text that describes the meaning of the flag

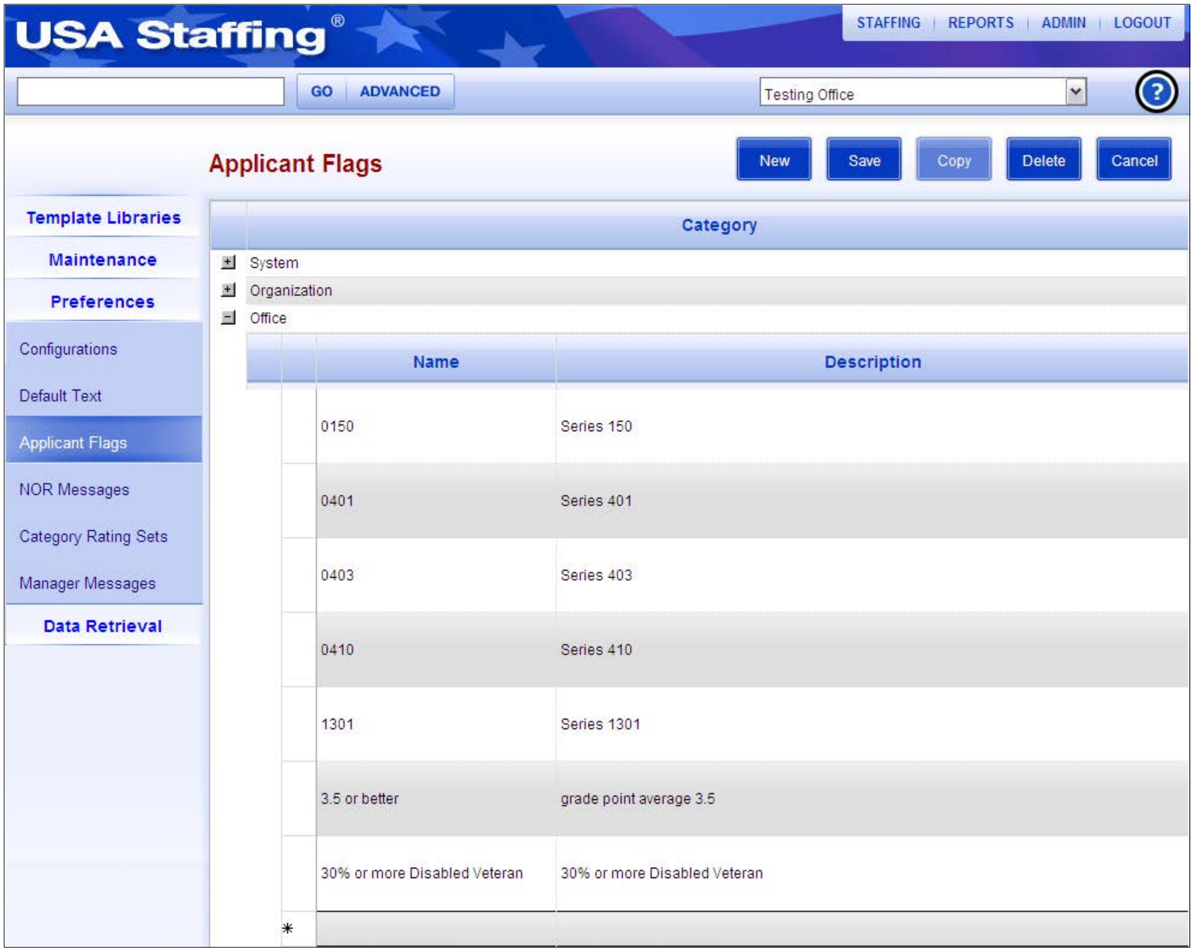
Below is a description of the options on this page.

Setting Applicant Flags. Applicant flags can be set in two ways:

- A user can manually turn on a flag for an applicant.
- USA Staffing can automatically turn on a flag on the basis of responses the applicant gives to a questionnaire.

Setting Up Automated Applicant Flags in Preferences. The applicant flags are displayed in a tree view format. You can expand the tree by selecting the plus sign. Applicant flags are available at three different levels, System, Organization, and Office.

The System level flags are created and managed by the USA Staffing Program Office and are available to all users. They cannot be modified by users. The Organization and Office level flags can be created and modified by users who have the appropriate permission profiles. The picture on the next page illustrates the expanded view of the Office level flags.



You can create, modify, and delete flags on this page:

- Create a flag by following these steps:
  - Select the category level for which you want to create a new flag.
  - Click the New button at the top the page. A new blank row will appear under the Name and Description column headings.
  - Enter the flag name and description in the new blank row.
  - Click the Save button.
  - Repeat the above steps to add more flags.
- Modify a flag by following these steps:

  - Expand the level that the flag is on by clicking its plus sign.
  - Select the row that contains the flag you want to modify.
  - Enter the flag's new name or description.
  - Click the Save button.
  - Go back to the top of the page.

- Delete a flag by following these steps:
  - Expand the level that the flag is on by clicking its plus sign.
  - Select the row that contains the flag you want to delete.
  - Click the Delete button at the top of the page.
  - Click the Save button.

NOR Messages

NOR message codes are codes that appear on the Notice of Results (NOR) for a given applicant. These codes advise applicants of their eligibility or ineligibility for each specialty and grade. These NOR messages can be used in the Assessment area under Rating Criteria when selecting an ineligible code for screen-out factors. They may also provide special rating messages to help explain an applicant's status in the hiring process. Users can apply customized message codes to individual applicants and can develop customized codes to supplement the ones built into USA Staffing.

There are four types of NOR message codes:

- Eligible
- Ineligible
- Message
- Not Rated

NOR message codes appear in three places:

- In the applicant's record
- In the NOR for the applicant (This is the only correspondence that uses the NOR message code.)
- On the Notification Letter (optional)

NOR message codes can be set two ways:

- A user can manually set a NOR message code for an applicant.
- USA Staffing can automatically assign NOR message codes to applicants based on their responses to screen-out questions on the questionnaire. These codes are assigned in the Assessment area under Rating Criteria.

To access the NOR Message page, do the following:

- Click the Administration button at the top navigation bar.
- Click the Preferences button on the left menu bar.
- Select NOR Messages.

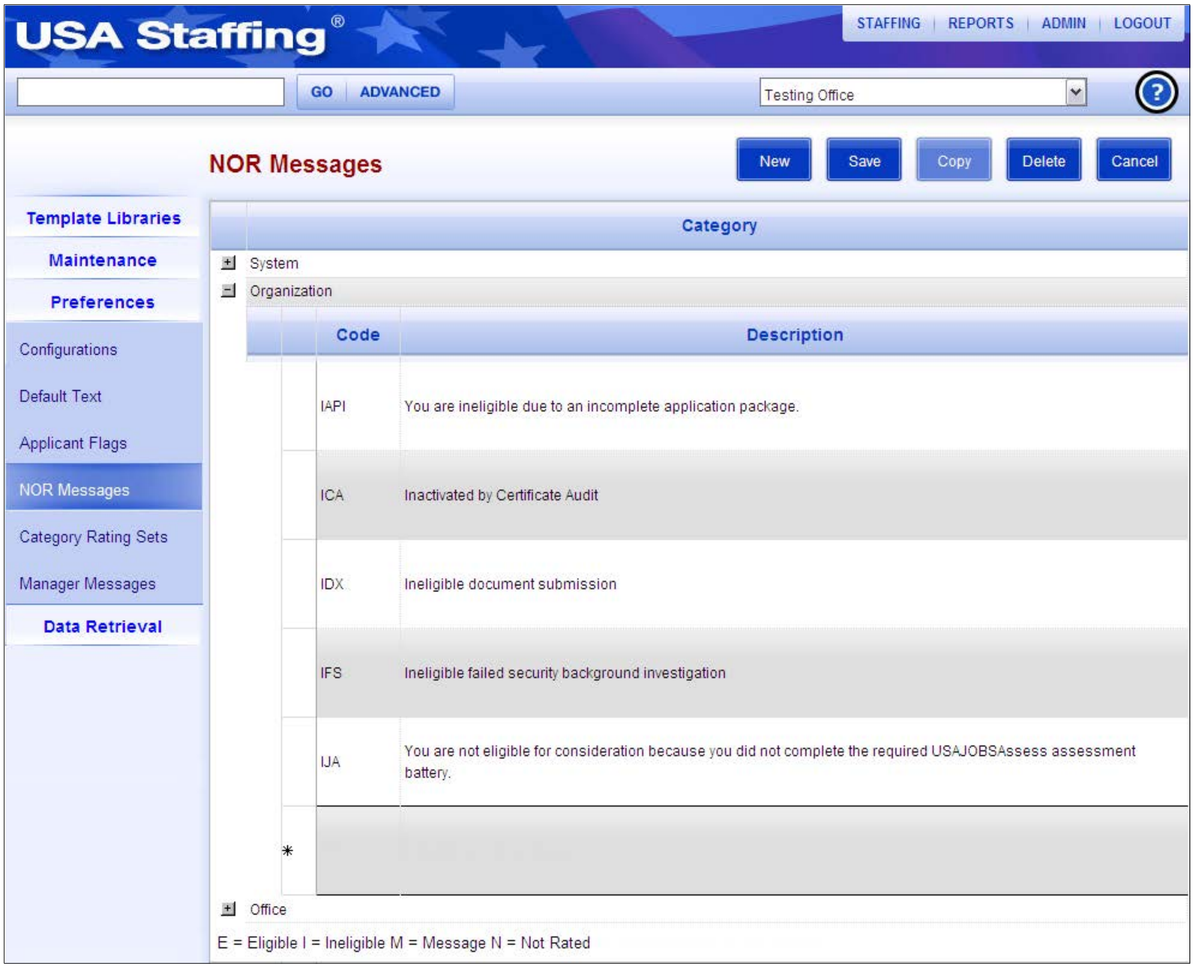
NOR message codes are displayed in a tree view format. You can expand the tree by selecting a plus sign. NOR message codes are available at three different levels (see picture below).

System level messages are provided by the USA Staffing Program Office and are available to all users. They cannot be modified by users. (See Appendix C for a list of all NOR Message Codes.)

The Organization and Office level messages can be created by users with the appropriate permission profiles.

Create a NOR Message Code. To create a NOR message code, do the following:

- Select one of the rows: Organization or Office. (Note that you can only select a category with the tree view completely collapsed. If you have already expanded one of the categories by clicking a plus sign, click either the Save or the Cancel button to restore the collapsed view before attempting to select a category.)



- Click the New button at the top of the page. A new blank row will appear under the Name and Description column headings.
- In the new blank row, type in the new NOR message code in the Name column and the description in the Description column. The requirements for NOR message codes are the following:
  - Message codes must start with one of these four letters:
    - E = Eligible
    - I = Ineligible
    - M = Message
    - N = Not Rated
  - The code can be a maximum of four characters.

  - The description should explain the code meaning because it will display to applicants on any correspondence sent to them.

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

- Repeat the above steps for any additional NOR message codes you want to create.

Modify a NOR Message Code. To modify a NOR message code, do the following:

- Expand the level that the NOR message code is on by clicking its plus sign.

- Select the row that contains the NOR message code you want to modify.

- Enter the NOR message code's new name and description.

- Click the Save button.

- Go back to the top of the page.

Delete a NOR Message Code. To delete a NOR message code, do the following:

- Expand the level that the NOR message code is on by clicking its plus sign.

- Select the row that contains the NOR message code you want to delete.

- Click the Delete button at the top of the page.

- Click the Save button.

Category Rating Sets

On this page, users with at least OA permission can create a pre-defined set. This Category Rating Set will be used for competitive vacancies created after the category rating set is established.

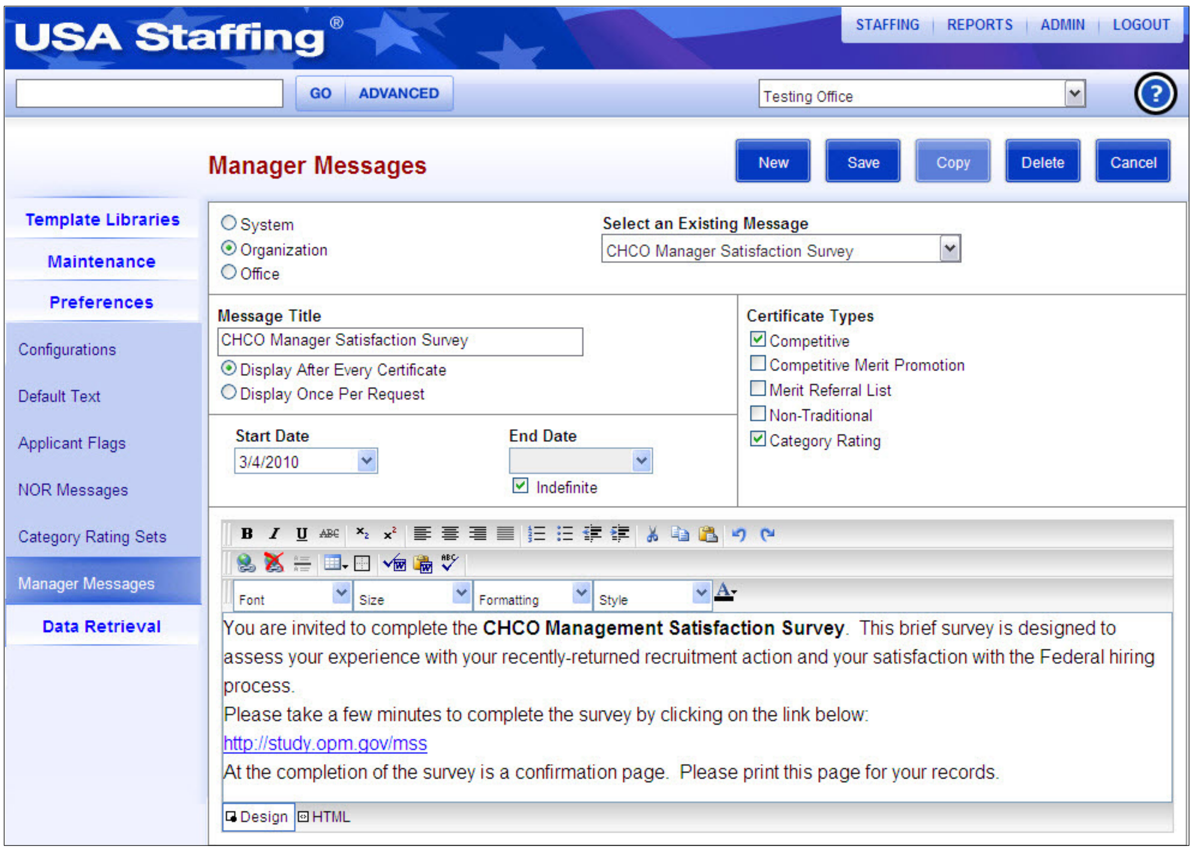
To create the category rating set, follow these steps:

- Click the New button. The system will add a new row.
- Enter the Title and Cut-Off Rating.
- Repeat these two steps to add additional categories. The set must contain at least two categories.

  Note: The cut-off rating for the highest quality category cannot be greater than 100 and the lowest quality category cannot be less than 70.

Manager Messages

The CHCO Manager Survey message is available under all USA Staffing offices to facilitate the collection of this survey data. On this page, you can utilize or modify the default message or create a custom message to be presented to selecting officials through Selection Manager when they return certificates electronically. Please note that managers must navigate to see multiple messages by selecting the numbers at the bottom of the Messages page in Selection Manager; therefore, you may want to limit the number of messages you create and choose to display for each certificate.



On this page, users with the appropriate permission can create, modify, and store messages at the Organization or Office levels.

To create a new manager message, follow these steps:

- Select the Organization or Office radio button, depending on whether it will be available to all users under your Organization or only users under your Office.
- Click the New button.
- Enter the Message Title.
- Select one of the two options listed for display frequency:

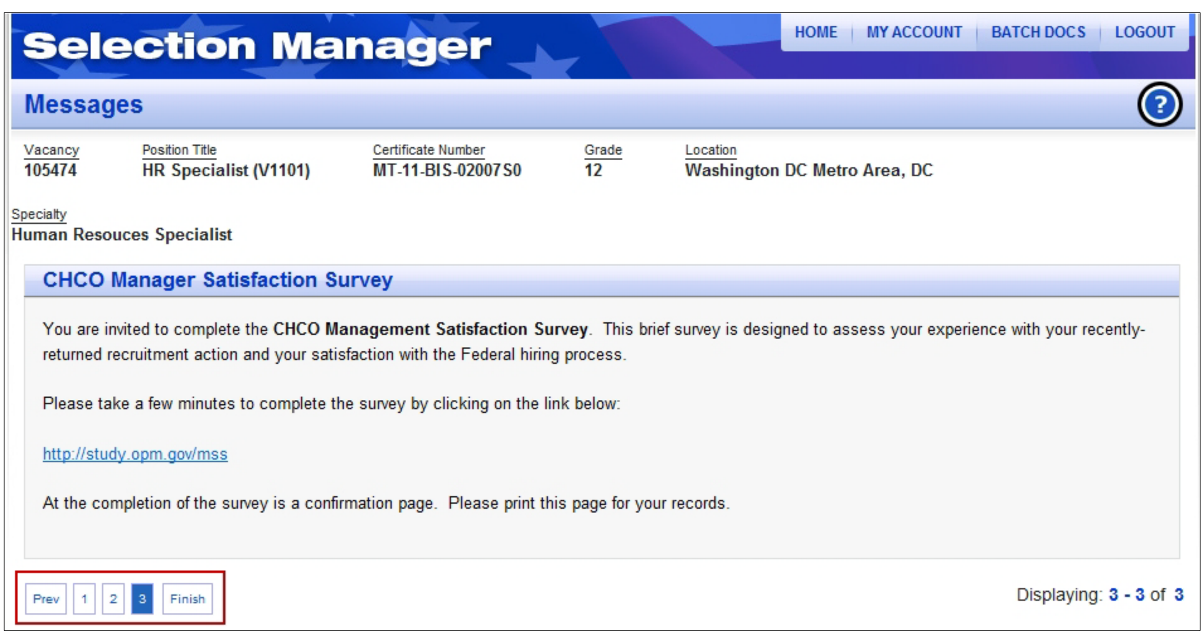
- o Display After Every Certificate – Choose this option to display the message/survey after each certificate returned.
- o Display Once Per Request – Choose this option to display the message/survey only after the first certificate returned for each request.

- Enter or select Start Date from the calendar.
- Enter or select an End Date from the calendar. You can also check the Indefinite box if you want to display this message indefinitely.
- Select all of the appropriate Certificate Types for this message to be presented to the selecting official.
- Enter and format your message in the text box and click the Save button.

To modify an existing message, follow these steps:

- Select the Organization or Office radio button based on the level the message was originally created under.
- Select the message you want to modify from the Select an Existing Message drop-down list.
- Make necessary changes.
- Click the Save button.

Note: After managers return a certificate through Selection Manager they will be presented with any active messages applicable for that certificate. Managers would need to click the numbers at the bottom of the page to see additional messages.



Check Your Skills – Set Preferences

Take 15 minutes to work individually practicing setting preferences for default text. Be ready to share the assignment if asked.

Change the default text for a Category by doing the following:

1. Click the Administration button.
2. Click the Preferences button.
3. Select Default Text.
4. From the Category drop-down list, select Correspondence.
5. Select Correspondence Text.
6. Select Customer from the Apply Preferences drop-down list.
7. Find your customer.
8. Select Body of Correspondence, Letter 1 to see the configurable text at the bottom of the screen.
9. Edit the text.
10. Click the Save button.

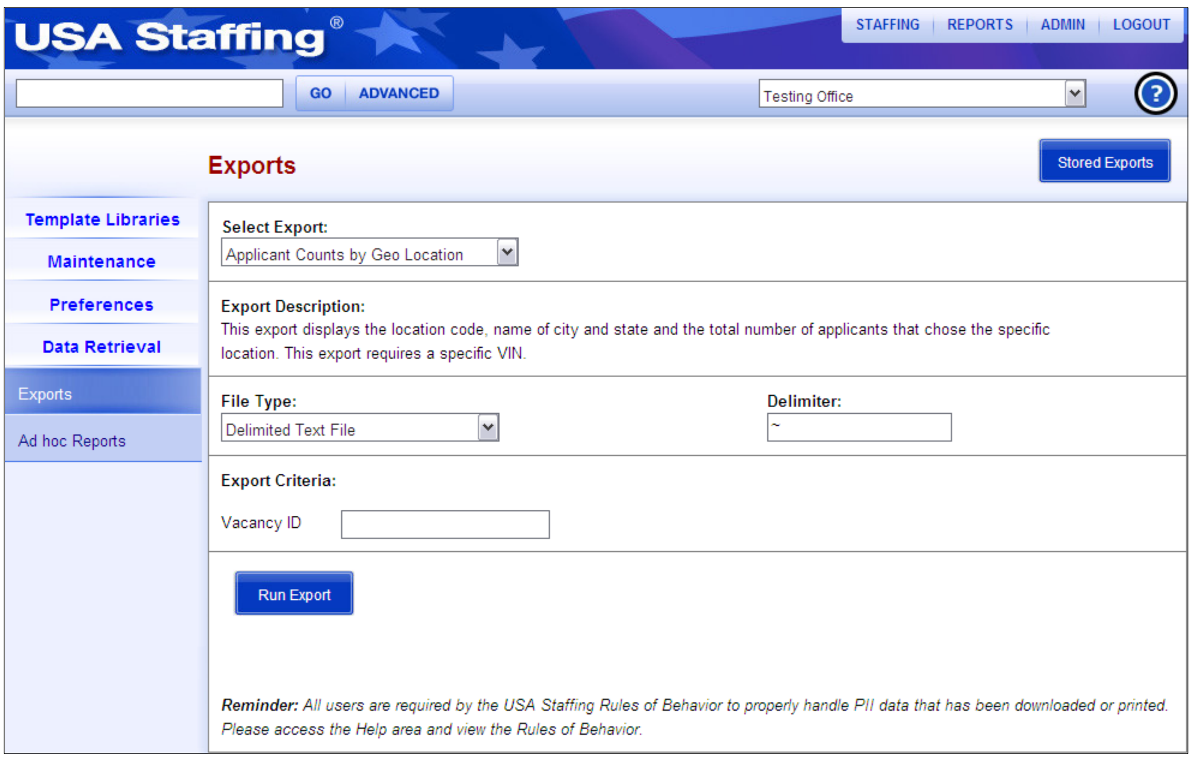
Data Retrieval

- Exports
- Ad Hoc Reports

The Data Retrieval pages of the Administration area give you the ability to manage exports, written tests, and ad hoc reports.

Exports

The export feature of USA Staffing provides raw applicant data in the form of a text file that can be analyzed or manipulated in another application, such as Excel, Access, or SPSS.



Announcements by Owner. This export can be used to generate a listing of announcements by Owner(s). Data can be selected by either announcement open date or close date.

Applicant Counts by Geo Location. This export displays the location code, the name of city and state, and the total number of applicants who chose the specific location. This export requires a specific VIN.

Applicant Data for Rating Import. This csv file is formatted for use in Assessment Rating Import. It includes all PL applicants in the Vacancy. Importing the file will make PL applicants IM (you did not take the test required for this specialty and grade). Any ineligible rating code can be used in place of IM.

Applicant Lists by RSC. This export displays the Last Name, Middle Initial, First Name, Record Status Code, and SSN of all applicants in a VIN by the selected Record Status Code(s). This export requires a specific VIN and Record Status Code.

Applicant Narratives Export. This export displays the Applicant ID, Item ID, Narrative Description, and Narrative Text. This export requires a specific VIN and the eligibility begin and end dates.

Applicant Responses. This export displays the applicant location selection and how many applicants responded to a specific question. This export requires the VIN, eligibility begin and end dates, and question number.

Assessment Data Export. This export displays applicant assessment component scores. The data is a summary of the results of the assessments delivered by the system and/or scored in the Assessor Module.

Certificates by Owner. This export can be used to generate a listing of certificates by Owner(s) and referral status.

Complete Applicant Record Export. This export displays the applicant’s information contained in their record for a specific VIN. This export requires a specific VIN, specific or all SSNs, and the eligibility begin and end dates.

Completed Tracking Numbers by Audit Date. This export details relevant announcement and certificate information for all audited selectee's tied to tracking numbers meeting the user-specified office and date range values.

Discrete Applicant Geos. This export displays the applicant’s SSN, Name, Record Status Code, and the Locations they have selected. This will include the location code, city, and state. This export requires a specific VIN. Users can select Eligibles Only or All Applicants.

Document Type Export. This export works in conjunction with the Complete Applicant Record Export to identify applicant records. It displays the applicants' supporting documentation identification information listing the document types and receipt dates. Users can select the type of documents to include.

Generic Applicant Data. This export displays the applicant's generic information. This export requires the VIN, eligibility begin and end dates, and Record Status Code. Users can also include a specific location code. If the location code is blank, the export will include all locations the applicants specified.

Generic Certificate Data. This export displays the applicant's generic certificate information. This export requires the VIN, certificate number, and eligibility begin and end dates.

Office Hiring Timeliness Export. This export will display the hiring milestone dates for applicants marked as Hired for your office. Applicants may be filtered by job posting types and job offers. Results may be sorted by customer office name, applicant name, or filter date.

Organization Hiring Timeliness Export. This export will display the hiring milestone dates for applicants marked as Hired for your organization. Applicants may be filtered by job posting types and job offers. Results may be sorted by customer office name, applicant name, or filter date.

Pending Completion Applications. This export displays all applicants in Pending Completion (PC) status. This export requires the VIN and eligibility start and end dates.

Summary Counts by Spec/Grade/Location. This export displays the total count of applicants who have responded to a specific miscellaneous item. This export requires the VIN, eligibility begin and end dates, and the specific miscellaneous item.

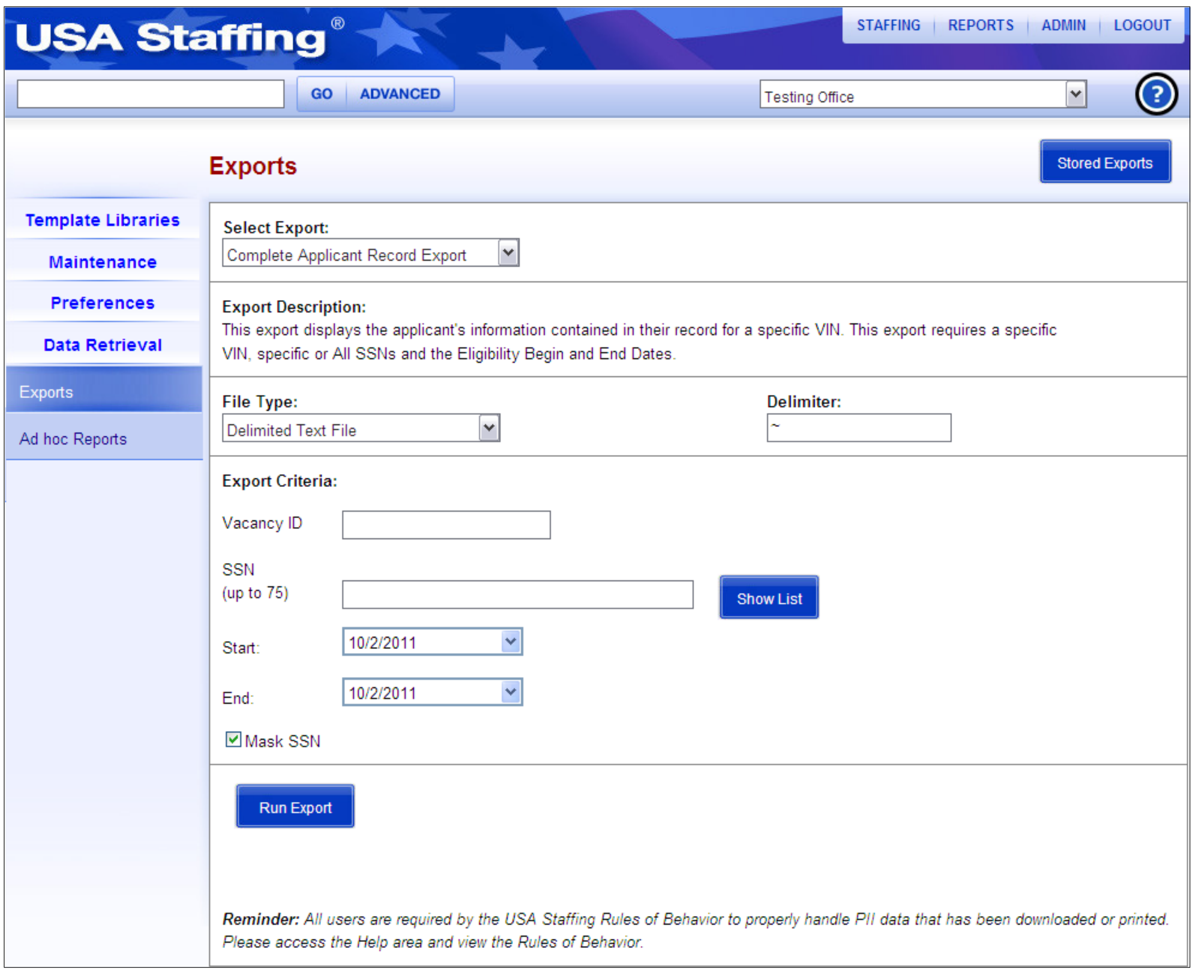
USAJOBS Demographic Information Export. This export displays aggregate data for applicants who answered the voluntary USAJOBS demographic data questions. Specifically, the export shows counts of applicants who applied, were rated qualified, and selected, broken down by race, ethnicity, and gender.

USAJOBS Demographic Source Export. This export displays raw data for applicants who answered the voluntary USAJOBS demographic data questions. Specifically, the export contains applicants' race, ethnicity, gender, and recruitment source information. Note: This export contains no personally identifying information to link responses to applicants.

To export data using the Exports page, do the following:

- Click the Administration button on the top navigation bar.
- Click the Data Retrieval button on the left menu bar.
- Select Export under Data Retrieval.

- Select the report you want to export from the drop-down list under Select Export. In the example on the next page, we have selected Complete Applicant Record Export.
- Leave the defaults for File Type and Delimiter. (The ~ key is to the left of the 1/! key, and you will enter this in Excel later.)
- Enter the VIN.
- Select the eligibility start and end date range.
- Click the Run Export button.



- Go to Stored Export and locate the report.
- Select the report to open.
- Select "Save As" and save the report as a text file (with a file extension of .txt).
- The file can be imported into Excel and manipulated as needed.

Ad Hoc Reports

On USA Staffing, ad hoc reports are managed through the use of Oracle Discoverer® software.

About Oracle Discoverer®. Oracle Discoverer® is a tool that lets you run queries and retrieve data that are available in the USA Staffing system and are not accessible in the standard reports.

Discoverer presents the results of your ad hoc queries in workbooks and worksheets, similar to those found in Microsoft Excel.

There are two levels of users of Discoverer. Viewer users can open existing workbooks and worksheets and view the results of the triggering queries. Plus users can use the Discoverer Wizard to create workbooks and worksheets, save them for reuse, and share them with other users.

Below is more information about these two user levels that will help you determine the type of user you want to be if your Administrator gives you a choice.

Viewer. When you connect to Viewer, you have a simple Web page display with a limited number of options. This user interface provides report options that are clearly labeled and offers most users reporting capabilities without the need for in-depth training.

You can switch to other worksheets contained in the open workbook by selecting their names on the Worksheets list in the upper left corner.

Here is a list of what you can do in Viewer:

- Change to a different worksheet or workbook.
- Rerun the query with different parameters, such as a different VIN.
- Change the appearance of the spreadsheet in certain ways, such as turning row numbers on and off or changing how many rows are displayed at one time, by selecting Presentation Options.
- Export the data to other common file formats, including Excel spreadsheets and HTML, which you can save on your local drive and email to others.
- Print the report.
- Change the table layout, such as rearranging or hiding columns.
- Use Online Help to learn more about the features.

Plus. See Supplemental Ad Hoc reporting information.

Check Your Skills – Section Summary

Take 3 minutes to work individually.

Use a whole sheet of paper and write down a review question on Section 3 for someone else to answer. Make sure your question is challenging but represents something you learned about the Administration area of USA Staffing.

Take 12 minutes to participate with the whole class in a group review activity.

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