

USA Staffing

# Shared Certificate Guide

A guide to using shared certificates in alignment with  
the Competitive Service Act

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## Introduction

On March 18, 2016, the Competitive Service Act of 2015 was enacted as Public Law 114-137. The “Act” allows an “appointing authority” to share a competitive certificate issued under Delegated Examining procedures with one or more “appointing authorities” to make an appointment to a position that is in the same occupational series, grade level (or equivalent), full performance level, and duty location during the 240-day period beginning on the date of issuance of the certificate of eligibles. For more information on the Competitive Service Act, please visit:

- [Competitive Service Act of 2015](#)
- [HR Report 114-367](#)
- [OPM Memorandum on Implementing Policy Guidance for the Competitive Service Act \(Shared Certificates\)](#)

This guide is intended to provide Federal agencies with guidance on how to use USAJOBS’ Talent Pool feature to help “advertise” available shared certificates from USA Staffing® (USAS) talent acquisition system, in accordance with the Competitive Service Act. It draws on staffing processes and system terminology that should be familiar to Federal HR Specialists.

## Roles and Responsibilities

### Agency

The term agency is used throughout this guide and is defined as the cabinet-level department to include all the components/sub-agencies/bureaus within.

### Original Agency

The original agency is defined as the agency that owns the vacancy and certificate(s) within USA Staffing (USAS) that will be shared as part of the Competitive Service Act (CSA). The original agency’s HR Specialist is responsible for ensuring their vacancy is set up properly (see Preparing Vacancy to Share Applicants steps), follows all requirements for sharing a DE certificate under the CSA and collaborating with components, sub-agencies and/or bureaus within their agency to determine appropriate process for sharing certificate and creating Talent Pool(s).

In cases of an agency centralizing their HR operations for all their components, sub-agencies and/or bureaus then the HR Specialist working for the centralized operations would act as the responsible Original Agency.

To request the Talent Pool Manager and Shared Certificate Coordinator roles, your agency’s primary Talent Team POC at the Department-level would need to indicate the individuals on sheet 2 of the *Merit Hiring Action Plan* and submit together (due on the last business day of each month) to

merithiring@opm.gov. When received by merithiring@opm.gov, OPM will take action to contact the individual(s) specified for those roles to schedule training. As updates are made for these roles, agencies are to submit sheet 2 on a monthly basis with the Merit Hiring Action Plan due on the last business day of each month.

### **Talent Pool Manager**

An HR Specialist from the original agency that is Delegated Examining certified and is the individual who worked on the CSA announcement and issued the certificate(s) of eligibles. The primary responsibility of the Talent Pool Manager is to create the Talent Pools in the USAJOBS Agency Talent Portal (ATP). The Talent Pool Manager is the one to provide or coordinate access with the Receiving Agency's requests through their Shared Certificate Coordinator for the actual certificate in USA Staffing and provide the Receiving Agency's Shared Cert Coordinator with a copy of all documentation pertaining to the creation of that certificate (e.g., the job analysis, JOA, rating schedule/crediting plan, application materials of those certified and opting-in to having their information shared, etc.); this includes providing technical assistance on the Competitive Service Act and the Talent Pool(s). Talent Pool Managers will be assigned the role in the USAJOBS Agency Talent Portal with approval from OPM's Hiring Experience Group and must attend a USAJOBS training on using Talent Pools before gaining access to the role.

Generally, the Talent Pool Manager will:

- Work closely with their agency's Talent Team(s) and/or HR operations team and hiring managers as there are other activities and events outside of USAS and the USAJOBS ATP
- Ensure DE procedures were followed on the shared certificate action and case files maintained as the original agency posting and making selections
- Ensure the CSA original agency requirements have been followed – [Competitive Service Act – Shared Certificates Q&A](#)
- Designated POC to create the CSA Talent Pool(s) in the USAJOBS ATP
- Respond to technical and policy-related shared hiring questions from original agency and receiving agencies (the Receiving Agency's Shared Cert Coordinator should be the one to guide their agency)
- Assist/facilitate with troubleshooting ATP or USAS-related issues across the original agency and the Receiving Agency (may require collaboration with the original agency's staffing/HR operations team and the Receiving Agency's Shared Certificate Coordinator)
- Liaise with the HR staff and hiring managers across the original agency (serves as the main HR POC for the CSA action)
- Collect and communicate with OPM on the number of selections made by the original agency and any receiving agencies

In the USAJOBS ATP, the Talent Pool Manager will:

- Create a CSA Talent Pool that includes only those referred candidates who have opted in to having their application materials shared with other Federal agencies not related to the original agency have not been selected for a position with the original agency, and/or have declined an offer by the original agency.
- Serve as the Point of Contact for Receiving Agency's Shared Certificate Coordinators and General Agency Users.
- Be the sole owner of the original agency's Talent Pool and will be the only individual who would be able to archive Talent Pools either because all candidates from that Talent Pool have already been selected, Talent Pools were created in error, and/or the Talent Pool Manager is transitioning roles.

## Receiving Agency

The agency who is using the original agency's shared certificate(s) for their own hiring needs.

Receiving Agencies consist of two different user types in the ATP, Shared Certificate Coordinator(s) and General Agency Talent Portal user(s).

### Shared Certificate Coordinator

An HR Specialist at the Receiving Agency who understands their agency's hiring needs, is Delegated Examining certified, and will be the one to manage their agency's copy of the Talent Pool. Shared Certificate Coordinators must attend a USAJOBS training on using Talent Pools before gaining access to the role. This person also coordinates the receipt and selection decision process of shared certificates within USA Staffing.

In the USAJOBS ATP, the Shared Certificate Coordinator will:

- Copy a talent pool that matches the hiring needs of their agency.
- Contact each candidate on the list to confirm if they are interested in positions at their agency.
- Share the Talent Pool with Agency General Users associated with the Shared Certificate Coordinator's agency
- Encourage active hiring managers and relevant HR Specialists to request and activate the Agency General User role in the ATP by emailing [recruiter-help@usajobs.gov](mailto:recruiter-help@usajobs.gov).
- Download the notification report from the ATP as part of the case file
- Update the list based on who is selected or declined

In USA Staffing, the Shared Certificate Coordinator will:

- Create requests to fill.
- Act as Reviewer or liaison for the Hiring Manager when making official selection(s) from an Applicant List review.
- Ensure all appropriate documentation is uploaded to the official vacancy case file to link the selection on the shared certificate to the Talent Pool.
- Facilitate the kickoff of the onboarding process for the selectee.

### **General Agency Talent Portal User**

HR Specialist, Hiring Manager or Recruiter at Receiving Agency that will be using the agency copy of the Talent Pool shared by their Shared Certificate Coordinator.

- If you wish to use USAJOBS' Agency Talent Portal, you can email the USAJOBS help desk at [recruiter-help@usajobs.gov](mailto:recruiter-help@usajobs.gov) to request the General Agency User role.

## Preparing Vacancy to Share Applicants (Original Agency)

**All criteria must be met for an applicant to populate on a Talent Pool from USA Staffing certificate (using API)**

	Step 1: Vacancy set up to allow sharing	Step 2: Applicant Agrees to be Shared	Step 3: HR Reviews Applicant	Step 4: Applicant referred on Applicant List	Step 5: Applicant is NOT selected by Original Agency's hiring manager	Outcome
Applicant 1	✗	N/A	N/A	N/A	N/A	Not shared
Applicant 2	✓	✗	✓	✓	✓	Not shared
Applicant 3	✓	✓	✗	✗	N/A	Not shared
Applicant 4	✓	✓	✓	✗	N/A	Not shared
Applicant 5	✓	✓	✓	✓	✗	Not shared
Applicant 6	✓	✓	✓	✓	✓	Shared

✗ – indicates the point in the process that stops the applicant from being shared. For Applicant 5, they were selected by original agency therefore they are not shared with requesting agency(ies).

Agencies should have a shared certificate Standard Operating Procedure in place before designating a job opportunity announcement as shared.

### USA Staffing Admin Area Setup

#### Add the appropriate language into your announcement template

1. Go to the Admin section of the system.
2. In the Templates section, select Manage Announcement Templates.
3. Select the template you will use when announcing a vacancy that may ultimately be shared with another agency. At this point you may also choose to create a new template or copy an existing template.
4. Add the following language into the “How You Will Be Evaluated” section of the announcement:

*When [Customer CPDF Agency Data Insert] completes its hiring, the remaining list of qualified candidates may be shared with additional federal agencies. You will have an opportunity to opt-in if you would like your name, application material, and assessment results shared to be considered for employment with additional agencies. There is no*

*guarantee of further consideration, and you can continue to explore other job opportunity announcements.*

## **Add an item to your announcement item library that will allow applicants to opt in or opt out**

NOTE: It is highly important when creating the announcement item the item header, item stem and item responses

1. Go to the Admin section of the system.
2. In the Libraries section, select Manage Announcement Items.
3. Click Create New Item.
4. Enter “Shared Certificates – Opt In” as the Item Header.
5. In the Required drop down, select Yes.
6. Select your office from the Owning Office dropdown options.
7. Add any additional Tags, as applicable.
8. In the Item Stem, insert the following language:  
*When **{{Customer CPDF Agency Placeholder}}** completes its hiring, the remaining list of qualified candidates may be shared with hiring managers and Human Resources specialists at additional agencies who are hiring for similar positions. Please opt-in here if you would like your name, application material, and assessment results shared with additional agencies. There is no guarantee of further consideration, and you can continue to explore other job opportunity announcements.*
9. In the Response Type dropdown, select Multiple Choice – Single Select
10. In the Response text, enter:
  - a. *I consent to having my name, application materials, and assessment results shared with other agencies. I opt in to having this information shared with additional agencies who are hiring for similar positions.*
  - b. *I only want to be considered by this agency. I opt-out of having my name, application materials, and assessment results shared with additional agencies.*

## **Create a shared customer that will allow you to provide receiving agencies access to review(s)**

If certificates will be shared with multiple agencies, you may choose to create a separate customer for each agency, or to create a single shared customer which will be used to link all the Hiring Manager user accounts for the requesting agency points of contact.

1. Go to the Admin section of the system.
2. In the Maintenance section, select Manage Customers.
3. Click Create Customer.
4. In the Customer Information section,
  - a. Enter your agency name followed by “Shared Customer” as the Internal and External Customer Name.

- b. Enter your agency information in the Address, City, State, Zip Code, Country, and Phone Number fields.
5. In the Organization Details section,
  - a. Select your USA Staffing Organization and Office from the dropdown items.
  - b. In the CDPF Organization, select your organization.
  - c. In the CDPF Agency, select your agency.
6. Leave the information in the Onboarding Defaults subtab blank.

## Announce Vacancy (Original Agency)

### Add Vacancy Tag to help with tracking and reporting

On the Vacancy tab, Settings page, within the Vacancy Tags area, select the “Shared Recruitment” tag from the Appointing Authority drop down. Note: This should be added as soon as you confirm a certificate(s) will be shared from the vacancy.

Agencies can create custom tags to distinguish different types of shared recruitment actions. It is the responsibility of the Agency’s to create, manage, and outline processes on the use of their custom tags. The link below described the steps to create a custom tag in USAS.

<https://support-usastaffing.opm.gov/hc/en-us/articles/45424312009875-Creating-a-tag>

### Add the “Shared Certificates – Opt In” announcement item

1. On the Announcement tab, Announcement Questionnaire page, click the Add to Preferences drop down that appears on the far-right side of the Preferences section.
2. Select Item from Library.
3. Select the Shared Certificates – Opt In item from the list.
4. Click Add Items to Preferences.
5. Click Save Sections.

### Use the Shared Certificates Announcement Template

1. When clicking into the Announcement Text subtab of the Announcement tab, the Choose Template prompt appears.
2. Select the applicable template containing the shared certificates language in the How You Will Be Evaluated section.

## Determine if a Certificate is Eligible to be Shared

If an agency is interested in receiving a certificate(s) from one of your existing announcements, ensure the announcement meets the following criteria before doing so.

The announcement on USAJOBS must have:

- Been opened through a Delegated Examining Authority for permanent or term positions;
- Provided notice that the resulting list of candidates may be used by one or more agencies; and,
- Provided an opportunity for applicants to “opt in” to have their application material shared.

All of the above must be met in order for sharing to occur; if not all met, any certificate from the announcement is not eligible to be shared under the provisions of the Act. Selections from shared certificates must be made within 240 calendar days of the date the original certificate was issued. Extensions beyond 240 days are not permitted.

## Create a list of Applicants to share

As an original agency participating in the CSA, you may not share candidates in a Talent Pool until your agency has completed making selections and has audited the original certificate(s) issued to the original agency’s hiring manager(s). Completing the certificate audit for the original agency’s certificate(s) will ensure that: 1) any applicant(s) already selected by the original agency will not be shared on the Talent Pool; 2) any applicants who did not “opt in” to have their application shared will not be included; and 3) any applicants selected but declined the original agency’s offer can still be shared.

1. Navigate to the Applicant Overview tab.
2. Click Create List.
3. Select the Category Rating Certificate Type.
4. Select the same Ordering Criteria and Filters used to issue the original Category Rating certificate. Depending on the volume of qualified candidates, you may wish to share both the veterans and the non-veterans in the highest category.
5. Select the Status (RSC) filters for AC.
6. Click the Add button next to Advanced Criteria.
7. Name the filter, e.g., “Opt in applicants only”
8. Select the Shared Certificates – Opt In question from the Item dropdown options.
9. Select Response Option for A. I consent to having my name, application materials, and assessment results shared with other agencies. I opt-in to having this information shared with additional agencies who are hiring for similar positions.
10. Click Apply.
11. Once all filters are in place, click Issue Certificate.

Repeat the steps above for every certificate you want to share and create a separate Talent Pool for each one using the steps outlined in the next section.

## Create and Publish USAJOBS Talent Pool

### Create a Talent Pool - (*Talent Pool Manager*)

The purpose of Talent Pools is to promote available candidates on shared certificates who have opted in to having their application materials shared with multiple agencies across government from Competitive Service Act (CSA) hiring actions. Talent Pools allow hiring managers and HR specialists to quickly view resumes and determine if they want access to the certificate in the Talent Acquisition System (TAS). Each certificate you want to share with other agencies will require its own Talent Pool to be created.

1. While creating a Talent Pool, you will need to refer to the following information from your vacancy and stored list(s) created in the steps above.
  - a. Job title
  - b. USAJOBS Job announcement control number
  - c. Series
  - d. Grade
  - e. Promotion potential
  - f. Location(s)
  - g. Certificate number
  - h. Original certificate(s) issue date
    - i. The date used for this field will determine the length of time candidates are available in the Talent Pool
2. Log in to [agencyportal.usajobs.gov](https://agencyportal.usajobs.gov) or click the *Recruit* button on the top menu within USA Staffing
3. Click on Talent search
4. Click on Search Talent Pools
5. Click on the Create new talent pool button
6. Fill out the form
7. Click Create talent pool
 

*The Add certificate candidates to the talent pool screen appears*
8. Review the Certificate list and deselect by unchecking the necessary checkboxes for any candidates who did not opt in to share their application or you do not wish to share with other agencies
9. Click Continue
10. A modal appears, click Continue again if you wish to proceed
11. The finalized list of candidates appears
12. Click Publish

**Note:** Once a talent pool is published, if you need to remove or edit a candidate on or off the talent pool once it has been published, you must “Archive” it by clicking the “Archive” button at the bottom of the Published page. You will need to select one of the two options: All candidates

have been selected or it was posted in error or has incorrect information.

## Copy a Talent Pool - (Shared Certificate Coordinator)

To request access to a Talent Pool, the receiving agency must identify an individual to serve as a Shared Certificate Coordinator who will receive training from the USAJOBS Program Office. The Shared Certificate Coordinator will request access to available Talent Pools in the USAJOBS Agency Talent Portal (ATP). In order to request an ATP account and become a Shared Certificate Coordinator, please email the USAJOBS help desk at [recruiter-help@usajobs.gov](mailto:recruiter-help@usajobs.gov). The USAJOBS Help Desk will send you an invitation to create an ATP account.

1. Once a Talent Pool is created in ATP, you will receive an email notifying you that the Talent Pool is available
2. Log in to [agencyportal.usajobs.gov](https://agencyportal.usajobs.gov) or click the *Recruit* button on the top menu within USA Staffing
3. Click on Talent search
4. Click on Search Talent Pools
5. Select the box(es) for the Talent Pools you want to copy and enter the number of Estimated Vacancies and then click the Submit Request button at the bottom of the page.
6. Presently, as there is a hiring freeze in effect due to the Presidential Action, the Shared Certificate Coordinator will have to complete this form that pops up once “Copy CSA pool” is clicked:

## Hiring Exemption Confirmation

To proceed with accessing an existing Talent Pool/certificate of eligibles, you must personally verify that the position you are trying to fill is exempt from the hiring freeze.

To confirm, please select one of the options below and then press "I confirm." If you are unsure if your agency has an exemption to fill this position, you must contact your supervisor for clarification and approval before moving forward.

- This certificate will be used to fill a position directly related to immigration enforcement, national security, or public safety.
- This certificate will be used to fill a position directly related to the provisioning of Social Security, Medicare, or Veterans' benefits.
- This certificate will be used to fill a position exempted by the Chief of Staff, Office of Personnel Management, explicitly and in writing.

I confirm

I cannot confirm

7. Navigate to the *Copied CSA pools* tab to open your copied Talent Pool.
8. Once a Shared Certificate Coordinator has requested a copy of an available Talent Pool in ATP, they must complete the *Next Steps* shown on the top of the page which includes contacting all candidates within that talent pool to confirm they are still interested in positions at the receiving agency.
  - a. Select Contact all candidates to email the candidates and confirm they want to be considered for positions at your agency.
    - i. USAJOBS has set the default time period of 3 calendar days for candidates to respond.
      1. If your agency has a different time period for which to allow candidates to respond, reach out to [recruiter-help@usajobs.gov](mailto:recruiter-help@usajobs.gov).
  - b. Candidate status will be updated automatically as interested, not interested or failed to respond based on their responses.
    - i. After 11:59pm EST/ET of the 3rd calendar day, those that have not responded will be marked as “Failed to respond” and the notification report will be generated in the ATP and ready for the Shared Certificate Coordinator to download as part of the vacancy case file.
      1. If no candidate marked that they were interested or all had failed to respond, then the Shared Certificate Coordinator will not be able to share the Talent Pool.
9. After 11:59pm EST/ET of the 3rd day, the Shared Certificate Coordinator will be able to click on the “Share Talent Pool” button that sends an auto-generated email to all Agency General Users associated with the Shared Certificate Coordinator’s organization that there is a new Talent Pool is available. General Agency Users will be able to view the candidates and their resumes.
10. Once all these steps are completed, your copied Talent Pool can now be shared and available to all Agency Admin or Agency General User of USAJOBS’ Agency Talent Portal at your agency.
11. The Talent Pool will remain active in your *Copied CSA pools* tab and will allow the SCC to update applicant responses to Selected or Declined, as needed.

## Documentation Reminder

Once your Talent Pool has been shared on the Agency Talent Portal, click the Export talent pool report (PDF) link to download a copy for your case file.

## Request Access Shared Certificate

### Indicate interest in viewing a shared certificate and request access (*Shared Certificate Coordinator*)

Contact the original agency’s Talent Pool Manager through the USAJOBS ATP and indicate interest in receiving shared certificates from them. You may wish to request a copy of the announcement, job

analysis, and assessment(s) to confirm the positions are similar.

- You can contact the original agency by clicking the name of the individual showing as *Created by* on the top left corner of the Talent Pool.
- Be sure to include the Job Announcement number list for the Talent Pool of interest so the original agency can find the associated shared certificate in USA Staffing.
- If you do not currently have a Hiring Manager User account with the original agency, they will need to create one for you at this time.

## Create Hiring Manager account in USA Staffing (Original Agency)

The Talent Pool Manager or other HR User from the Original Agency with access to the shared certificate will need to verify if Hiring Manager accounts already exist for the Receiving Agency users.

1. Search the Manage Users area for the Receiving Agency users by email.
  - a. If a user account exists, make sure the user has access Hiring Manager permissions to the Shared Customer created in previous steps.
  - b. If a user account does not exist, create a Hiring Manager user account and grant permission to the Shared Customer created above.
2. Complete the same process for all additional Receiving Agency Hiring Managers received on the initial request for access.

After the access is granted, log into the USA Staffing system. If you have an account in multiple tenants or with multiple user types, be sure you are logging in to the original agency's tenant as a **Hiring Manager User**.

<https://support-usastaffing.opm.gov/hc/en-us/articles/45424358570899-Switching-between-tenants>

## Original Agency sends the shared certificate to Receiving Agency

1. Login to USAS and locate the vacancy associated with the certificate being requested.
2. Navigate to the Certificates tab and locate the certificate to be shared and open it by clicking on the Certificate Number.
3. Follow the steps in the link below to create and send an Applicant List Review.  
<https://support-usastaffing.opm.gov/hc/en-us/articles/45424295482259-Creating-a-review-from-a-certificate>

Repeat the steps above for every certificate you want to share.

## Documentation Reminder

The agency sharing the certificate and the agencies receiving the certificate are each responsible for maintaining complete case file documentation sufficient to reconstruct all hiring actions in accordance with the DEOH. Each time a certificate is shared, each receiving agency is responsible for creating a new instance of a case file to document its use.

When sharing a certificate, the original agency will provide a receiving agency with a copy of all documentation pertaining to the creation of that certificate (e.g., the job analysis, JOA, rating schedule/crediting plan, applications of those certified, etc.).

This documentation should be included in the Documents area of the Applicant List Review.

### Receiving Agency accesses shared certificate

#### [Access the shared certificate\(s\) that were sent to you](#)

1. Log into USA Staffing
  - a. For individuals who use USA Staffing for their own recruitment actions (different than the shared certificate program), you will want to make sure you are in the tenant assigned by the original agency who is sharing the certificate. Also, if you hold another user type (HR User or Onboarding User) within USA Staffing you will want to make sure you are logged into the Hiring Manager interface to review the shared certificate.
2. Locate the review in the Reviews section.
3. Click the review name to open the review.
4. Click the certificate(s) you want to review.

#### [Review the referred applicants on the shared certificate\(s\) and make selection decision](#)

- As soon as the Shared Certificate Coordinator receives the Applicant List Review, review the applicants on the shared certificate and annotate the appropriate Return Status Code based on the information provided on the exported talent pool report. This will ensure the other Hiring Manager Users will clearly see who is available for potential selection.
  - For applicants who Failed to Respond to email sent through the Agency Talent Pool mark them Failed to Reply
  - For applicants who responded to email sent though the Agency Talent Pool 'Not Interested', mark them as either Withdrawn from Consideration or Declined Interview/Assessment, whichever is most appropriate.



On rare occasion the certificate shared in USAS from the Original Agency to the Receiving Agency, may contain additional applicants that did not populate on the Talent Pool. This happens when applications are key-entered in USAS versus applying online through USAJOBS or the applicant was added to the certificate after the Talent Pool was created. It is important for these individuals to receive the same consideration as the other candidates reviewed in the Talent Pool. Shared Certificate Coordinators should work with the receiving agency Hiring Managers to ensure proper consideration and reviews are completed.

Within the Applicant List Review, Hiring Manager users can review applicant documentation, add applicant notes and toggles, view applicant assessment questionnaire responses, eligibility claims and adjudications. If an applicant is selected from the shared certificate mark their Return Status Code as 'Selected'.

## Return the Applicant List Review to the Original Agency

### Announce Internally

If a selection is envisioned from the shared certificate(s), they first must provide notice of the available vacancy to its own employees, give them up to 10 days to apply, and review their qualifications before a selection can be made from the certificate from an outside agency. Please follow the internal announcement guidance outlined in your agency's shared certificate Standard Operating Procedure.

**Note:** *The announcement open period may not exceed 10 days. The law does not permit an internal application period beyond 10 days to satisfy this requirement. Store all documents and selection decisions related to the shared certificate in the vacancy case file for audit purposes.*

Prior to taking the steps below, be sure to print a copy of the Certificate of Eligibles and Job Opportunity Announcement from the Applicant List Review. These documents will need to be uploaded into a centralized case file in later steps.

1. Return to the Review Overview tab.
2. Select an approval status from the dropdown.
3. Click the Return to HR button.

Note: Once the review is returned by a user, no other users with access to the review can make any changes to the certificate. If the review is not returned, it will automatically be recalled once it reaches 240 days from the original certificate issue date.

## Notify applicants of non-selection

The Receiving Agency will need to establish a process for notifying applicants of their non-selection. All applicant email addresses can be found on the Certificate of Eligible document downloaded in previous steps outlined in the Applicant List Review section of this document. See sample language below:

Subject: Disposition for Application Shared for [Position Title], [Pay Plan]-[Series]-[Grade(s)], location with [Receiving Agency Name]

Body Text:  
Hello,

When applying for Announcement [Announcement Number from original JOA], you opted-in to have your application shared with other agencies interested in filling similar positions. Your application was shared with our agency, [Receiving Agency name].

We regret to inform you that you were not selected for the position of [Position Title], [Pay Plan]-[Series]-[Grade(s)], located in [location].

## Documentation Reminder

All Required Documentation listed in the next section will need to be uploaded into the Documents area of the Request created within the Receiving Agency's tenant in USA Staffing.

## Creating a Request in USA Staffing

### If the Receiving Agency makes a selection from the Shared Certificate

If a selection was made from the shared certificate, the Receiving Agency can initiate an Onboard New Hire request in their own USA Staffing tenant to manually onboard the selected individual(s). Following the steps outlined in this link for Creating an Onboard New Hire Request.

<https://support-usastaffing.opm.gov/hc/en-us/articles/45424266181523-Creating-a-new-hire-request>

Once the request is approved, click the "View New Hire" button, and complete the process according to your agency standards.

## If the Receiving Agency does not make a selection from the Shared Certificate

If the Receiving Agency does not find a viable applicant for selection from the Shared Certificate, they will need to initiate a New Vacancy Request in USA Staffing to ensure all required documentation listed below is stored in a central location for audit purposes.

1. Click the Create Request button from the Request Dashboard
2. Fill in all required information on the Request Information tab
3. Upload all required documentation listed in the Required Documentation section of this guide
4. Hit Save, then navigate back to the top of the screen and in the Status drop down select Request Cancelled, with the appropriate reason.

## Update Copied Talent Pool - (*Shared Certificate Coordinator*)

Once a Receiving Agency has completed all the previous actions above, the Shared Certificate Coordinator will need to go back into their copy of the Talent Pool and ensure all the applicant statuses are updated based on the outcome of the certificate review.

1. From the Talent Pool dashboard go to copied CSA Pools
2. Click on the Talent pool title you want to update
3. For each candidate listed, select the appropriate status (Selected, Declined, None of the above)
4. Selections will save automatically

## Required Documentation

### **Maintain case file documentation of the shared certificate(s)**

It is important that the Receiving Agency retain copies of all required documentation associated with the case, including copies of the certificate of eligibles and actions taken, job analysis, job opportunity announcement, and assessment materials developed by the original agency. After the Applicant List Review is returned to the original agency, you may not be able to access this information in USA Staffing again, so it's important to download a copy prior to returning the Review.

All Required Documentation will need to be uploaded into the Documents area of the Request created within the Receiving Agency's tenant in USA Staffing.

1. Job Analysis
  - a. This information should be included as a document in the Applicant List Review sent by the Original Agency. If they do not include it, you will need to request a copy via email.
    - i. Click Documents menu in Applicant List Review
    - ii. Open Job Analysis file
    - iii. Download a copy to be used in later steps
2. Job Opportunity Announcement
  - a. In the Applicant List Review, click the View Announcement
  - b. When announcement is rendered click the print button and save for later steps
3. Certificate of Eligibles (shared certificate)
  - a. Within Certificate of Eligible, click the print button
  - b. Download a copy to be used in later steps
  - c. Repeat this step for each Certificate of Eligible associated with the Applicant List Review
4. Receiving Agency Position Description
5. Documentation that the CSA requirement to announce internally before using shared certificate was completed
6. Declination and/or Failure to Reply documentation from applicants
7. Export of Talent Pool
  - a. To download the talent pool report:
    - i. Sign into ATP
    - ii. Open the Talent Pool in USAJOBS Agency Talent Portal
    - iii. Open a talent pool you've copied
    - iv. On the right-hand side under next steps, you will see a link to Export Talent Pool file to (PDF)

#### To upload into Request

1. Open the request.
2. Click the Documents button.
3. Click Choose File.
4. Select a File.
5. Click Upload.
6. Once the file has been processed, it will be viewable by anyone who has access to the request.

**If you have any additional questions about the shared certificates process that were not addressed in this guide, please contact your USA Staffing Account Manager.**

## Appendix A: System Generated Emails sent throughout the process

### A. Talent Pool available

- **Recipient:** All Shared Certificate Coordinators
- **Trigger:** When a Talent Pool Creator clicks "Publish" on Review and Publish page, generate the following email to all Shared Certificate Coordinators. *If the user is both a TPC and a SCC, they will not receive an email for the talent pool they created.*
- **Email subject line:** A new talent pool is available in the Agency Talent Portal
- **System generated email content:**

Hello <Recipient First Name> <Recipient Last Name>,

A new talent pool is available in the Agency Talent Portal (ATP). View the <Talent Pool Title> talent pool for more details.

Thanks,

Agency Talent Portal

### B. Talent Pool will expire in 30 days

- **Recipient:** Creator of the talent pool
- **Trigger:** Scheduled task runs daily for talent pools – talent pool will expire in 30 days
- **Email subject line:** Talent pool will expire in 30 Days
- **System generated email content:**

Hello <Recipient First Name> <Recipient Last Name>,

The talent pool, <Talent Pool Title>, will expire in 30 days on <Expiration Date>. After this date, we will archive the talent pool, and you will no longer have access to it or the hiring certificate.

Please complete any hiring actions using this talent pool before <Expiration Date>.

Thank you,  
The USAJOBS Agency Talent Portal Team

### C. Talent Pool will expire in 7 days

- **Recipient:** Creator of the talent pool
- **Trigger:** Scheduled task runs daily for talent pools – talent pool will expire in 7days
- **Email subject line:** Talent pool will expire in 7 Days
- **System generated email content:**

Hello <Recipient First Name> <Recipient Last Name>,

The talent pool, <Talent Pool Title>, will expire in 7 days on <Expiration Date>. After this date, we will archive the talent pool, and you will no longer have access to it or the hiring certificate.

Please complete any hiring actions using this talent pool before <Expiration Date>.

Thank you,  
The USAJOBS Agency Talent Portal Team

### D. Talent Pool Archived

- **Recipient:** Creator of the talent pool
- **Trigger:** From the CSA or CGA Manage talent pool page click archive this talent pool
- **Email subject line:** A talent pool has been archived
- **System generated email content:**

Hello <Recipient First Name> <Recipient Last Name>,

The <TalentPoolRole> has archived the <Talent pool name> (<TalentPoolLink>) pool. You will lose access to this talent pool in the next 24 hours. If you have questions, contact the <LinkTitle> (<ContactEmail Link>).

Thanks,  
The Agency Talent Portal Team

## E. Shared Certificate Coordinator requests access to existing Talent Pool

- **Recipient:** Talent Pool Creator
- **Trigger:** When a Shared Certificate Coordinator submits a request to copy of an existing Talent Pool
- **Email subject line:** You have a pending CGA approval request in the Agency Talent Portal
- **System generated email content:**

Hello <Recipient First Name> <Recipient Last Name>,

A Shared Certificate Coordinator, <Coordinate full name>, has requested to view and use the <talent pool name> talent pool in the Agency Talent Portal (ATP). Please review their request <link to the approval page> and approve or deny it.

You may need to follow up with the Shared Certificate Coordinator to complete the required documents.

Thanks,

The Agency Talent Portal team

## F. Next steps for Shared Certificate Coordinator after requesting approval to access existing Talent Pool

- **Recipient:** Requesting Shared Certificate Coordinator
- **Trigger:** Available CGA pools tab request access submitted
- **Email subject line:** Next steps to access requested talent pool in the Agency Talent Portal
- **System generated email content:**

Hello <Recipient First Name> <Recipient Last Name>,

You have requested to view the <talent pool name> talent pool in the Agency Talent Portal (ATP). To use this talent pool, you must complete this document <document is link to PDF URL which is added at the time of creation of talent pool> and send it to the talent pool creator <talent pool creator is email hyperlink> for approval.

You will receive an email once the talent pool creator reviews and approves your request.

Thanks,

The Agency Talent Portal team

## G. Shared Certificate Coordinator is **approved** access to Talent Pool

- **Recipient:** Requesting Shared Certificate Coordinator
- **Trigger:** approves a shared certificate coordinator to view a talent pool
- **Email subject line:** Your request to view a talent pool has been approved
- **System generated email content:**

Hello <Recipient First Name> <Recipient Last Name>,

A talent pool creator has approved your request to view the <talent pool title> talent pool.

Thanks,

Agency Talent Portal

## H. Shared Certificate Coordinator is **denied** access to Talent Pool

- **Recipient:** Requesting Shared Certificate Coordinator
- **Trigger:** When a Talent Pool creator denies a shared certificate coordinator request to view a talent pool
- **Email subject line:** Your request to view a talent pool has been denied
- **System generated email content:**

Hello <Recipient First Name> <Recipient Last Name>,

A talent pool creator has **denied** your request to view the <talent pool name> talent pool.

Please contact <talent pool creator> for more information.

Thanks,

Agency Talent Portal

## I. Contacting all candidates on the Talent Pool to confirm interest (single and multiple locations are combined)

- **Recipient:** Candidates on Talent Pool
- **Trigger:** When the Shared certificate coordinator selects the "Contact all candidates" button on the Candidates page
- **Email subject line:** Are you interested in this federal position?
- **System generated email content:**

Hello <Recipient First Name> <Recipient Last Name>,

You recently applied for a position with the <talent pool manager agency name> and agreed to have your name and application materials shared with other federal agencies hiring for similar positions. The <insert shared certificate coordinator agency name> has received your application and is hiring for <insert talent pool title and locations> position(s).

- <location>
- <location>

We'd like to know if you are interested in being considered for this position. You can submit your response below.

Submit response <clickable link>

Please respond by <agency respond-by date>. Your response will be recorded as **failed to respond** if we do not hear from you by this date.

Your response will not prevent other agencies, which may also have your application, from contacting you about similar positions.

Due to federal hiring rules, we must first consider employees from our current workforce, as well as other individuals covered by specific policies. Once these requirements are met, we may consider other applicants, such as yourself, for these positions.

Thank you,  
<SCC name>  
(Agency of SCC)

## J. Contacting all candidates on the Talent Pool to confirm interest (multiple location)

- **Recipient:** Candidates on Talent Pool
- **Trigger:** When the Shared certificate coordinator selects the "Contact all candidates" button on the Candidates page
- **Email subject line:** Are you interested in this federal position?
- **System generated email content:**

Hello <Recipient First Name> <Recipient Last Name>,

You have recently applied for a position with the <agency name> and agreed to have your name and application materials shared with other federal agencies hiring for similar positions.

We have received your application and are hiring for <talent pool title> positions in multiple locations at the <agency name>. We are contacting you to see if you are interested in being considered for this position.

### **Are you interested in this position?**

Please email <hyperlink of SCC email> by <agency respond by date> to **let us know if you do or do not want us to consider you for the multiple** <talent pool title> positions at <agency name>.

Available locations for this position are: <List the locations in bulleted format, as entered during talent pool creation>

We will remove your application from this position if we do not hear from you by <agency respond by date>.

Due to federal hiring rules, we must first consider employees from our current workforce and other specific individuals. Once we meet our internal requirements, we may consider other applicants, such as yourself, for these positions.

Your response will not impact other agencies, who may also have your application, from contacting you if they have similar positions.

Thank you,  
<First name of SCC > <Last name of SCC>  
<Agency of SCC>

## K. At least 1 interested candidate after response period closes

- **Recipient:** Shared Certificate Coordinator
- **Trigger:** At the end of the failed to respond task and at least one person has responded "interested" on the Manage talent pools page
- **Email subject line:** {TALENT POOL TITLE} Talent Pool is Ready to be Shared
- **System generated email content:**

Hello <Recipient First Name> <Recipient Last Name>,

The <Talent Pool Title> talent pool is ready to be shared with your agency. Sign in to your Agency Talent Portal (ATP) account to manage and share this talent pool.

<Sign in to ATP> (Will display as a link, when clicked, navigates the user to ATP login then to the Manage candidates page of the associated talent pool)

Thank you for using the Agency Talent Portal.

Sincerely,  
Office of Personnel Management

## L. No interested candidates after response period closes

- **Recipient:** Shared Certificate Coordinator
- **Trigger:** At the end of the failed to respond task, if there are no candidates "Interested"
- **Email subject line: Update:** {TALENT POOL TITLE} Talent Pool
- **System generated email content:**

Hello <Recipient First Name> <Recipient Last Name>,

No candidates from the <Talent Pool Title> talent pool have indicated interest. With no eligible candidates, this talent pool cannot be shared and no further action is required from you.

Thank you for using the Agency Talent Portal.

Sincerely,  
Office of Personnel Management

## M. Talent pool shared with at least one interested candidate

- **Recipient:** All agency admins and general users
- **Trigger:** A talent pool with at least one interested candidate is shared
- **Email subject line:** Here's a list of candidates you might be interested in
- **System generated email content:**

Hello <Recipient First Name> <Recipient Last Name>,

A new talent pool is available for your review in the Agency Talent Portal. This talent pool is a list of approved candidates being considered for open positions within our agency.

Please review the candidates in the following talent pool to see if any meet your hiring needs.

<Talent Pool link>

You must have an Agency Talent Portal account to access talent pools. To request an account, please email [recruiter-help@usajobs.gov](mailto:recruiter-help@usajobs.gov).

Thank you,

<Shared Cert Coordinator>