

USA Staffing® Classification Implementation Guide

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Introduction

USA Staffing® is OPM's talent acquisition solution designed by and for Federal agencies. USA Staffing is the foundation for a successful hiring process, securely connecting Classifiers, HR staff, managers, applicants, and new hires to the data and tools they need. This guide provides step-by-step instructions on implementing the classification module effectively to streamline the process and ensure accuracy in position classification across your agency.

Example Benefits to Using USA Staffing's Classification

- ✓ Increased timeliness and efficiency in creating position descriptions
- ✓ Better tracking of the classification process
- ✓ Elimination of paper case files
- ✓ Real-time electronic status updates
- ✓ Reduction/elimination of paper position descriptions
- ✓ Elimination for the need for agency position description storage/housing
- ✓ Ability for Subject Matter Experts to electronically review PDs
- ✓ Ability to collaborate with Hiring Officials and Subject Matter Experts through reviews and notes
- ✓ Ability to classify positions directly from the tool and have PD information flow into the Request

Overview of the Classification Module

USA Staffing includes a standardized, yet flexible classification capability integrated with its core recruiting functionality. Published position description (PDs) created in the classification module are linked to recruitment requests and include competencies relevant to the position.

USA Staffing has classification functionality that allows HR users to classify positions using a variety of classification systems and formats. We understand that many Classifiers do not need access to all the recruitment tools available in USAS. Therefore, these users can be assigned custom HR User permissions that limit their access to solely classifying positions, utilizing a non-paid license. Additionally, Classifiers can leverage the "Reviews" feature to electronically collaborate with Hiring Managers during the classification process.

Classifiers can publish final PDs in USA Staffing. PDs are published in an electronic library that can be pulled into your recruitment request. The PD library allows for inactive PDs to be retired. Hiring Managers have direct access to published PDs, based on their access in the Hiring Manager Interface. The HR user can easily

permission a PD to a broader audience of HR users and/or Hiring Manager's within the organization by selecting additional offices to tag the PD. All HR Users with permission to those offices will be able to access the PD in a view only state. All HM Users with permission to a customer tied to one of those offices will be able to view the PD. Agencies will need to decide to what capacity they will utilize the Classification feature. USA Staffing has classification functionality that allows HR users to classify positions using a variety of classification systems and formats.

Step 1: Assemble a Team

Before implementing the Classification module, it is crucial to adequately prepare. This involves identifying resources, selecting an overall implementation approach, and planning the implementation process.

Identify Resources

Ensure that you have the necessary resources, including personnel with the appropriate skills, access to relevant data, and any technical resources required for the implementation.

First you will want to start by assembling a team. Assign roles and responsibilities to team members to ensure a smooth implementation process. Some typical roles for this project include Project Manager, Communications Lead, Training Lead, Executive Sponsor. Identify other stakeholders that need to be considered throughout the process. Who will need to make decisions? Receive communications? Attend agency-specific training for procedures? What other key stakeholders need to be included to ensure a smooth transition?

Also, determine if there are any other resources you may need to support the transition. Consider what work you may also need to perform to transition existing PDs, as well as decommission other systems and processes.

Select the Implementation Approach

Much of your planning will depend on how you will be using the classification module of USA Staffing. If your agency plans to use the full system functionality you will need to decide:

1. How to roll out new PD creation. Here are some questions to consider:
 - a. Will all occupations be covered or only certain ones?
 - b. Will all classifiers be expected to use USA Staffing starting on a certain date?
 - c. Or will you roll out by serviced organizations? Or by series?
2. What to do with existing (valid) PDs. Here are some common options:
 - a. Leave them where they are and just begin creating new ones in USA Staffing. This can be a reasonable strategy if your existing storage doesn't have additional cost implications, you are not experiencing issues with your current storage system, and you have limited time/resources currently that might be able to be freed up over time.
 - b. Use the shell method to get legacy PDs into USA Staffing while you build out all new PDs in the

system. The shell method consists of entering only the few required fields into USA Staffing and then uploading the PD and supporting documents into the Documents section. This method saves a large amount of time from cutting and pasting all sections into their places in USA Staffing. Over time you can build more PDs in USA Staffing and decommission shell PDs as updates occur.

- c. Use this transition as an opportunity to review and create all PDs in USA Staffing. This is the most labor-intensive option for agencies with a large number of PDs.

Important considerations for these decisions:

- Are your existing PDs current, accurate, and well-crafted? Do you have a lot of outdated ones that need to be updated or consolidated? Which PDs should be retired rather than being moved into your new system?
- Do you have an existing system that you need to extract the PDs from to avoid paying additional licensing?
- How many classifiers do you have and how many PDs need to be created in USA Staffing?
- What are your timeframes?

Note: USA Staffing does not have a mass upload feature for existing PDs.

Plan the Implementation Process

Develop a detailed implementation plan that outlines the steps, timeline, and milestones for the project. This plan should include a risk management strategy to address any potential challenges that may arise during the implementation.

Step 2: Prepare your Organization

Communication is one of the most essential elements to a successful transition to using Classification in USA Staffing. As with any major change, employees may be reluctant to adopt new technology or change familiar business practices. Collaboration of the executive leadership team, HR Specialists, Hiring Officials, union representatives, and others specific to your agency will help build awareness of the transition project, meet legal requirements, secure the buy-in of system users and customers, and support implementation goals.

Identify Stakeholders

We recommend agencies complete a stakeholder analysis ([Appendix A – Stakeholder Analysis](#)) as one of the first steps for developing a communication plan. A stakeholder analysis is a technique of systematically gathering and analyzing information to determine whose interests should be considered throughout the USA Staffing implementation project. It is critical for project success to identify those people early in the project and to analyze their levels of interest, expectations, importance, and influence.

Determine What/How to Communicate with Each Stakeholder Group

The communication plan should identify the needs of your stakeholders and identify who needs what information, when they will need it, how it will be given to them, and by whom it will be given. Communication activities can take many shapes and forms. We recommend looking for types of communication that can cover more than one stakeholder's needs.

Key stakeholders may include but are not limited to:

- Senior Leadership
- Unions
- HR Users/Classifiers
- Hiring Officials/Subject Matter Experts (SMEs)
- Classification Partners

Examples of communications designed to build buy-in and enthusiasm for the project could include:

- Meeting 1-on-1 with key stakeholders (e.g., users/classifiers, leadership, union officials) on an ongoing basis
- Traveling to various field locations and departments to explain benefits of Classification in USA Staffing (e.g., town hall meetings)
- Providing testimonials from individuals who have used Classification
- Planning celebrations to bring visibility to the completion of major milestones
- Publicizing accomplishments across the agency
- Providing implementation status reports for leadership
- Conducting ongoing meetings (in person, conference calls, videoconferences) with the Implementation Team
- Providing ongoing metrics (e.g., number of position descriptions created, number of position descriptions approved and for what series)

It is essential to include your Account Manager in your communication plan.

Highlight Benefits

In developing your communications strategy or plan, we recommend focusing key messages on the benefits of the change specific to each stakeholder group at your agency. An effective communications strategy provides transparency and a shared vision for the various audiences.

Step 3: Review USA Staffing Functionality and Test your System Settings

The next step involves setting up the Classification module within the USA Staffing [Stage](#) system. This includes setting up permission profiles, determining the office and organization structure you will be using, testing the system by entering many diverse sample PDs to determine how you will use the pages and fields in the system.

For detailed information on system functionality, review the [Manage Position Descriptions](#) portion of Online Help.

It will be particularly important to test tagging PDs to ensure your set-up will allow you to share the PDs in the correct space within USA Staffing. Documenting the results of your testing and any related business process decisions will help your entire team better understand how to consistently and effectively use the system.

Tip: In deciding how to structure the office and organization within USA Staffing, your team is highly encouraged to collaborate with your agency's USA Staffing Office Administrator. Typically, agencies already have established offices, organizations, and customers so it will be a matter of deciding the best way for your team to use the spaces already created so that the resulting PDs can easily be shared with the staffing teams. If your team services multiple offices and needs restricted access to edit PDs, you may be able to leverage a template or other restricted office if available. USA Staffing permissions are highly configurable so please reach out to your Account Manager if you need to discuss how to accomplish your goals.

Create Business Process Rules and/or Standard Operating Procedures

USA Staffing operates on a single platform, meaning all USA Staffing customer agencies have access to all the system's features including Classification. This flexibility ensures your agency can use USA Staffing to complete a broad range of hiring actions, as well as create, maintain and store position descriptions.

If your agency currently has documented Business Process Rules and/or SOPs in place for your classification processes, these procedures will likely require some modification when implementing USA Staffing's Classification. We strongly recommend reviewing and updating your Business Process Rules and/or SOP's and ensuring the following topics are addressed:

User Permission Profiles

It is important to determine how your agency will control access to Classification. USA Staffing permission profiles reside at the individual user level and your agency is responsible for determining the permission profile for each user. Depending on the needs of your agency, some system features may not be necessary for your users to complete their work. In addition, not all your users need access to modify information stored in the system. Your Account Manager can help you determine which USA Staffing features best meet your needs and how to best configure the system to meet your needs.

USA Staffing offers many flexibilities for user accounts and permission profile management. The system contains default system level permission profiles; however, agencies can create their own custom permission profiles. User profiles are divided into two types of permissions: Paid and Unpaid.

All Paid Human Resource Users (HR Users) automatically have access to the Classification area of the system. However, those needing to access only Classification do not need a Paid user license. Office Administrators can create a custom permission profile for classifiers where access limits the user to only areas needed by the users. The system is highly configurable. Office Administrators should work with their Account Manager for

assistance with setting up custom profiles.

Reviews

Reviews are HR's mechanism for connecting and sharing information with hiring managers or other SMEs who need to provide feedback on work HR is performing in USA Staffing, including classification. The use of Reviews can vary by agency and can be utilized to best fit the needs of your HR office and agency's business processes. Reviews are a great way to share information to increase and document collaboration between the Hiring Manager/Subject Matter Expert and the HR Office. Utilize the resources available on the Resource Center to create an SOP that makes the most sense for your office/organization.

Step 4: Train and Grant Access to Your Classifiers

Each agency will develop a different training plan based on the size and experience of their users. We recommend analyzing your stakeholders to determine which groups need training, what training would be best suited to the group, and who will ensure that training is completed.

Agency POCs should:

- Define Training needs for specific stakeholder groups
- Create any agency-specific Job Aids for Users
- Determine how and when Hiring Managers/SMEs will be trained by the agency

The USA Staffing Training Catalog and training modules can be accessed from the USA Staffing Resource Center and contains a module for Classification. The USA Staffing [online training modules](#) are not intended to teach participants classification, rather they teach users how to use USA Staffing to perform their work. This is a good starting point for training your classification team.

PD reviewers, authorizers, or hiring managers using the Hiring Manager interface of USA Staffing to interact with PDs should have a separate training plan since their role is limited and unique. The USA Staffing interface is designed to be simple so that minimal training is required. Many agencies choose to hold lunch and learn sessions to help orient the users with the functionality, but you can also have your classifiers or liaisons hold direct coaching sessions if needed.

Once users are trained, you will want to create their accounts and configure any required access. We recommend that access and 'go live' happen as close as possible to the training sessions so that users can put their knowledge to use right away.

Step 5: Go Live

Launch the Classification module in Production and begin using it for real-time position classification and storage. Monitor the system closely during the initial phase to ensure that it functions correctly and meets the agency's needs. It's also good to have an established protocol in place for reporting any questions or issues internally.

Step 6: Evaluate the Project and Adjust As Needed

Once your team has gone live in the system, schedule regular check-ins to determine how things are going. Provide continuous support to users to address any questions or issues they may encounter. This includes offering refresher training sessions, troubleshooting technical problems, and making any necessary system adjustments.

Step 7: Continue to Engage

The USA Staffing Program Office understands the enduring need for automated staffing technology. We are committed to long-term partnerships with our customer agencies and appreciate that you have chosen USA Staffing to meet your federal hiring needs. We understand each agency has unique business processes and challenges that will impact the strategy you choose to implement and use the system over time. We trust this Implementation Guide will serve as a starting point for your internal discussions but hope that the conversations continue throughout your use of the system.

Online Help Feature

The USA Staffing's online help feature is available 24 hours a day, 7 days a week for all users. The online help icon is available on every screen in USA Staffing and is designated as a question mark located in the upper right-hand corner of each screen and can be accessed by selecting Review Online Help. The help text is context sensitive and provides both text and screenshots to help users understand system functionality.

Content is updated with each system release.

Help Desk Support

The USA Staffing Help Desk is available to provide technical support and guidance. Our Help Desk is fully integrated into the USA Staffing system. Users receive automatic email acknowledgement of Help Desk tickets as soon as the tickets are created. Our Help Desk staff respond during business hours through email. Our Help Desk staff may initiate a phone call and/or screensharing session, if necessary.

Tickets are submitted by clicking on the question mark located in the upper right-hand corner of each screen and selecting Submit a Help Ticket. The ticket will prefill information based on the user and the area of the system the user is in when they select Submit a Help Ticket.

Conclusion

The Classification module of USA Staffing is a powerful tool that helps agencies streamline the process of classifying and storing position descriptions. By working with your Account Manager and following this implementation guide, agencies can ensure a successful setup and utilization of the module, ultimately enhancing their staffing and recruitment processes.

Continue meeting with your Account Manager. Your Account Manager is available throughout your partnership with USA Staffing and is a valuable resource in helping your agency improve your agency's processes.

- ✓ Regularly update your SOPs. We recommend creating a recurring update schedule to ensure your SOPs reflect the most current processes used by your agency, considering applicable USA Staffing system changes and new features.
- ✓ Ensure users are kept abreast of system changes.
- ✓ Continue providing regular communication to your stakeholders.

Communication is the #1 KEY to success!!

Helpful Links

- [USA Staffing Resource Center](#)
- [USA Staffing Classification Help](#)
- [USA Staffing Production](#)
- [USA Staffing Stage](#)
- [USA Staffing Training](#)
- [USA Staffing Online Course Portal](#)

Appendix A – Stakeholder Analysis

Below are some questions to help your implementation team develop a stakeholder analysis.

- What are the goals of the communications strategy?
- What information do you want to convey to each stakeholder group about implementing Classification within USA Staffing?
- Who is the executive-level champion for this project?
- What groups, individuals, and organizations are impacted by the transition to Classification in USA Staffing?
- Which stakeholder groups need to approve the implementation?
- Who should represent and/or speak for each stakeholder group?
- What does each stakeholder group need to know about the transition?
- What motivations and interests are impacted by the transition to USA Staffing?
- What types of communication tools (e.g., web sites, emails, town hall meetings, and flyers) are appropriate or effective for each group?
- What communications capacity does your group have internally? Does your agency have a communications department you can leverage? Can you use outside support to help with this effort?
- Have you completed similar communication efforts in the past? What approaches were effective? What lessons can you apply from past experience? (think of your implementation of USA Staffing)
- What is your timeline for implementation? When will the first PD be created? If transitioning from a previous automated tool, when will you discontinue work in there?
- Who should communicate this information? When and how will they do this?
- How will you evaluate your efforts?

Sample Template

Name of Stakeholder/ Group	Department	Needs	Can help by...	Can hinder by...	Communication Tools

Appendix B – Decisions for your Agency

Part of your role in USA Staffing may be making decisions that have implications to the Organization, Office or even agency wide. Please consult with your Account Manager on which decisions may apply to you. Examples include (but are not limited) to the following areas:

Decision Point	Areas of the System	Your Agency's Approach
Naming Conventions: areas of the system where you can create a streamlined approach to names	Position Description Numbers	
Case File Approach: Review your policy for retaining these materials	Position Description Numbers	
Classification/PD Library Decisions: Who in your agency will utilize the classification functionality within USA Staffing?	<p>USA Staffing allows Classifiers to manage the process of building PDs, capturing Hiring Manager/Authorizer feedback through Reviews, capturing electronic signatures, and grant access to the PD library to Hiring Managers.</p> <p>You can also capture basic information such as a PD reference number, title, pay plan, series, and grade for a PD.</p>	
Reviews: Will Classification Reviews be utilized?	Classifiers can send a review of the PD to Hiring Managers to gather feedback and capture signatures.	
Permissions	<p>Who will oversee permissions?</p> <p>Who will create a custom Classification permission profile?</p>	