

## Referral Training Exercise 3: Review and Hiring Manager

Now that you have completed the online portion of training for Referral, it is time to log into the Training environment of USA Staffing to practice what you have learned. Use this step-by-step guide to help you practice this lesson. Retain your notes to assist you with other lessons.

This practice exercise will walk you through sending a certificate to a Hiring Manager, working a certificate as a Hiring Manager, and returning the certificate to HR. This exercise requires that you have:

1. A Certificate
2. Permissions to log in as both a Human Resources and Hiring Manager User in the Training environment

**If you meet both criteria, proceed to step 1 to begin this lesson.**

- If you do not have a certificate, you can access the entire practice training series on the USA Staffing Training Resources page at: [https://help.usastaffing.gov/ResourceCenter/index.php/USA\\_Staffing\\_Training\\_Resources](https://help.usastaffing.gov/ResourceCenter/index.php/USA_Staffing_Training_Resources) You will then need to complete the Request, Vacancy, Assessment, Announcement, Application, Referral (Exercises 1 & 2) exercises before proceeding with this exercise.
- If you do not have access to the Training environment as both a HR and Hiring Manager user, someone with Administrator access in your office will need to give you permissions. Here are instructions for editing an existing user account: [https://help.usastaffing.gov/USAS/index.php?title=Edit\\_User](https://help.usastaffing.gov/USAS/index.php?title=Edit_User).

**Important Note:** Your Hiring Manager access must include the Customer/Office that was selected in the request tied to your certificate so you can receive a Review. See example below.

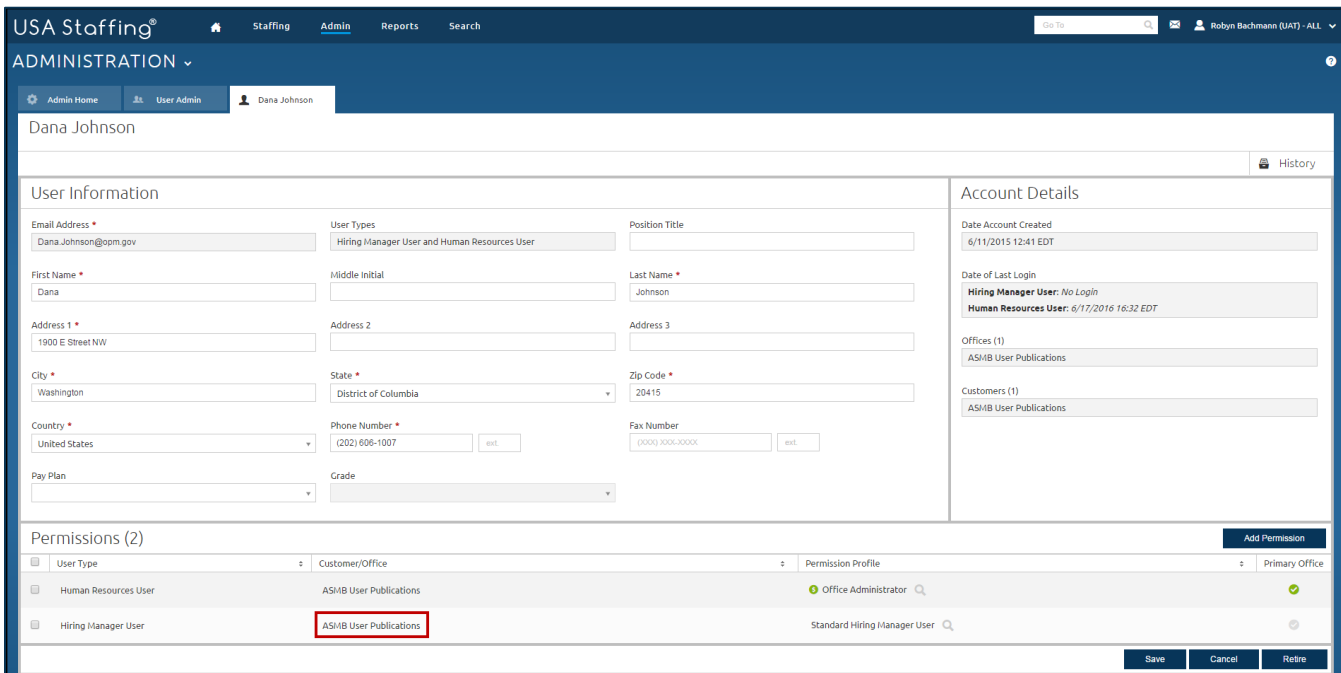


Image 1A: Administration – User Admin page with the Customer/ Office for a Hiring Manager profile highlighted.

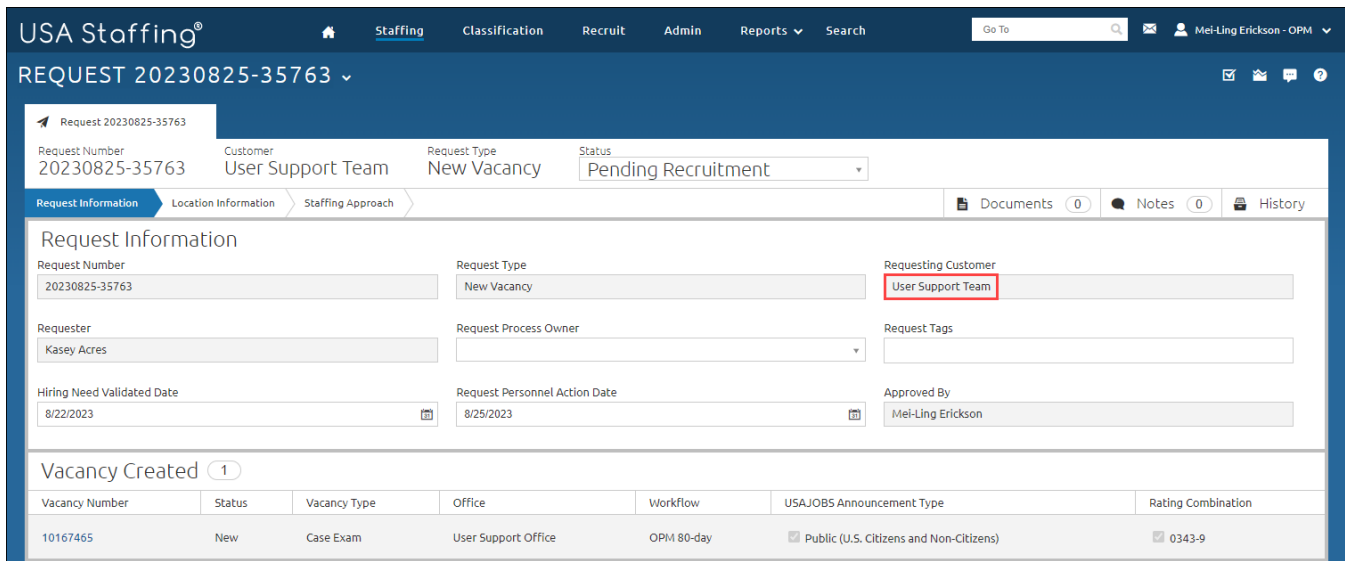


Image 1B: An approved request. The Requesting Customer field is highlighted because it matches the Customer/ Office that is showing in Image 1A.

My Vacancy Number: \_\_\_\_\_

1. Go into your **Vacancy Number**. There are several ways to access a Vacancy Number:
  - a. If you know your number, you can type it directly in the **Go To** box at the top of the page and click **Enter**.
  - b. You can locate your request in the Requests tab of your dashboard. Once in your request, there is a direct access link under the **Vacancy Created** section.
  - c. If you have recently gone into this Vacancy Number, it will show up in your dashboard drop-down list
2. Once in your Vacancy, navigate to the **Reviews** tab. If the Reviews tab does not automatically display, use the **+** to select **Reviews**.

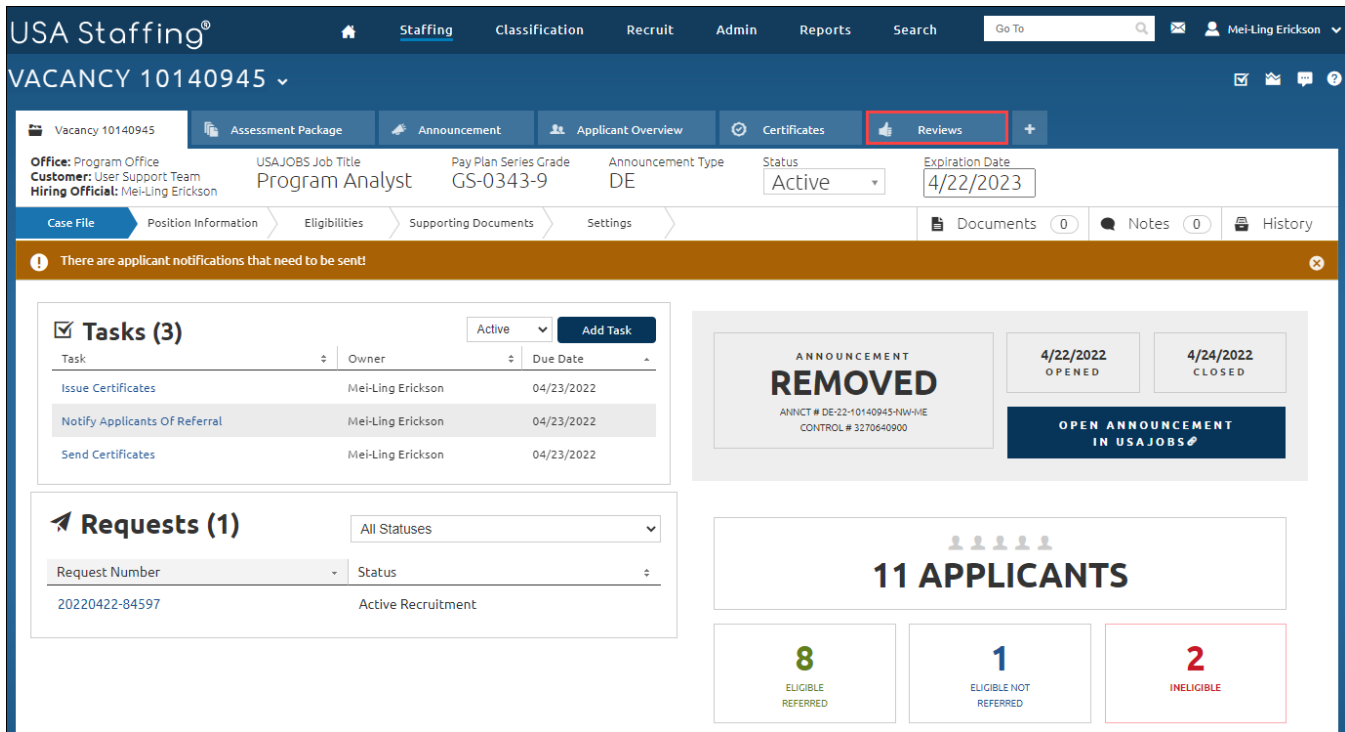


Image 2: Vacancy Case File page with the Reviews tab highlighted. It is located near the top of the page.

3. Click the **Create Review** button at the top of the page and select **Applicant List**.

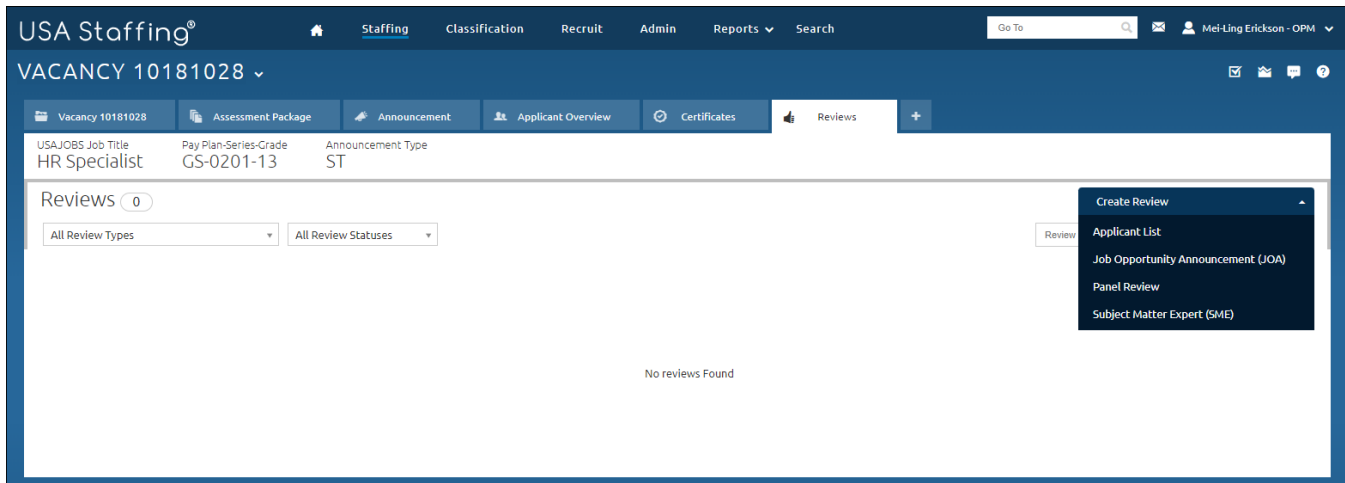


Image 3: Reviews page. The Create Review has an option for Applicant List.

4. Complete the Review Information tab of Create Review.
  - a. Give the Review a **Name**.
  - b. Set a **Due Date** for the Review. The **Due Date** is the date the review is due to be returned.
  - c. The **Auto Recall Date** is based on your office's configuration. If the review has not been returned by that date, the system will automatically return it and the Hiring Manager will no longer have access to it. If this does not appear on your page it means your office has not set this item as a configuration in Admin.
  - d. The **Owner** is the person who will be notified when the review is returned, typically this will be you.

- e. **Review instructions** are instructions you want to give to the Hiring Manager to follow upon receipt of the review. The instructions may not exceed 500 characters. Some agencies use specific wording for all Reviews. If your agency has standard language saved as a template, you can add it by clicking the gear icon and selecting **Select Instructions**. If not, type 'sample instructions'.
- f. You need to have at least one applicant list/Certificate selected but can have more if you want. To add an applicant list/Certificate, click the **Add Certificate** button. All Certificates that have been issued under this vacancy will display. If you don't see anything it means this vacancy does not have any issued certificates. You will need to return to the list you were working and issue a Certificate.
- g. The **Requests** section will automatically populate. To add an additional request, click the **Add Request** button.
- h. Leave the Followers section blank. A Follower receives e-mail notifications about the status of the Review, like when it is returned, but is not granted access to the Review in USA Staffing.
- i. Once you **Save**, the Overview and **Review Assignments** tabs will activate.

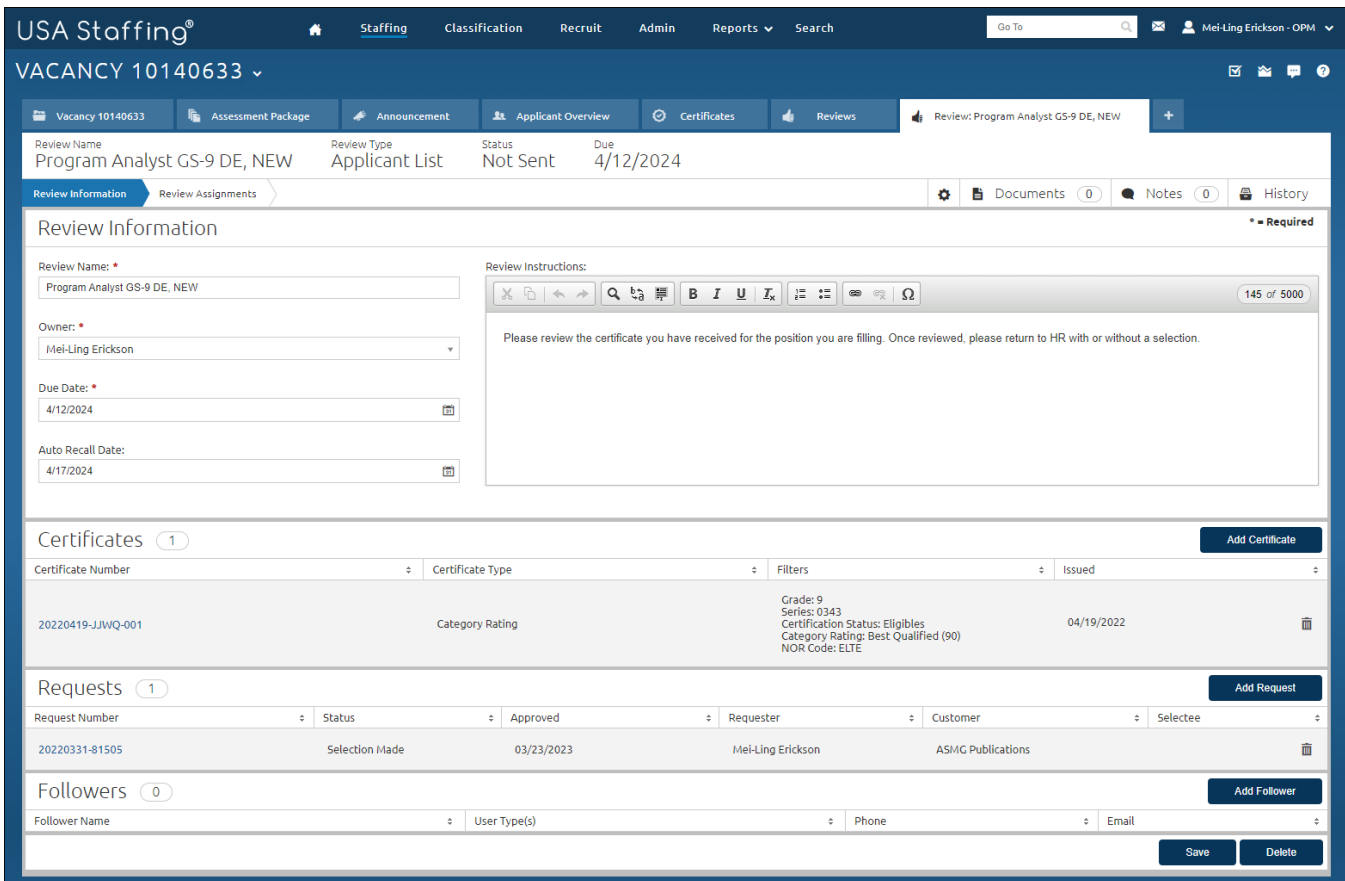


Image 4: Create Review page completed as specified in the above steps.

- 5. Go to the **Review Assignments** sub tab.
  - a. The **Review Assignments** section is where you add Hiring Manager(s) you will be sending the certificate to. To complete the rest of this activity, you will need to have a Hiring Manager account that has been added in this section. You will use the filters on the left side of the page to locate your Hiring Manager User account. You

only need to enter one of the filters, such as your Last Name or E-mail and click the Search box. When you locate your name, click the **Add** button to the right of your name and then click the **Save & Close** button. If you do not see your account under the **Add Reviewer** button, review instructions at the beginning of this lesson. Remember that the Reviewers available are tied to the Customer selected on the Request displaying on this page. If you have troubles getting your name in this section, contact your Office Administrator or submit a help desk ticket by using the **?** icon at the top of the page. Click the **+** next to the **Reviewer Name** to see what permissions have been assigned.

- b. You will need to be able to **Make selection decisions** in order to complete this lesson.
- c. Make sure the **Return to HR** box is checked.
- d. The Return individual selections box is defaulted based on your agency. Leave it as defaulted.
- e. Make sure you have View Applicant Documents checked for the document types you want to be able to view as a Hiring Manager. The options in this field will depend on what Supporting Document types were Accepted in your Vacancy.
- f. When ready, click the **Send Review** button.

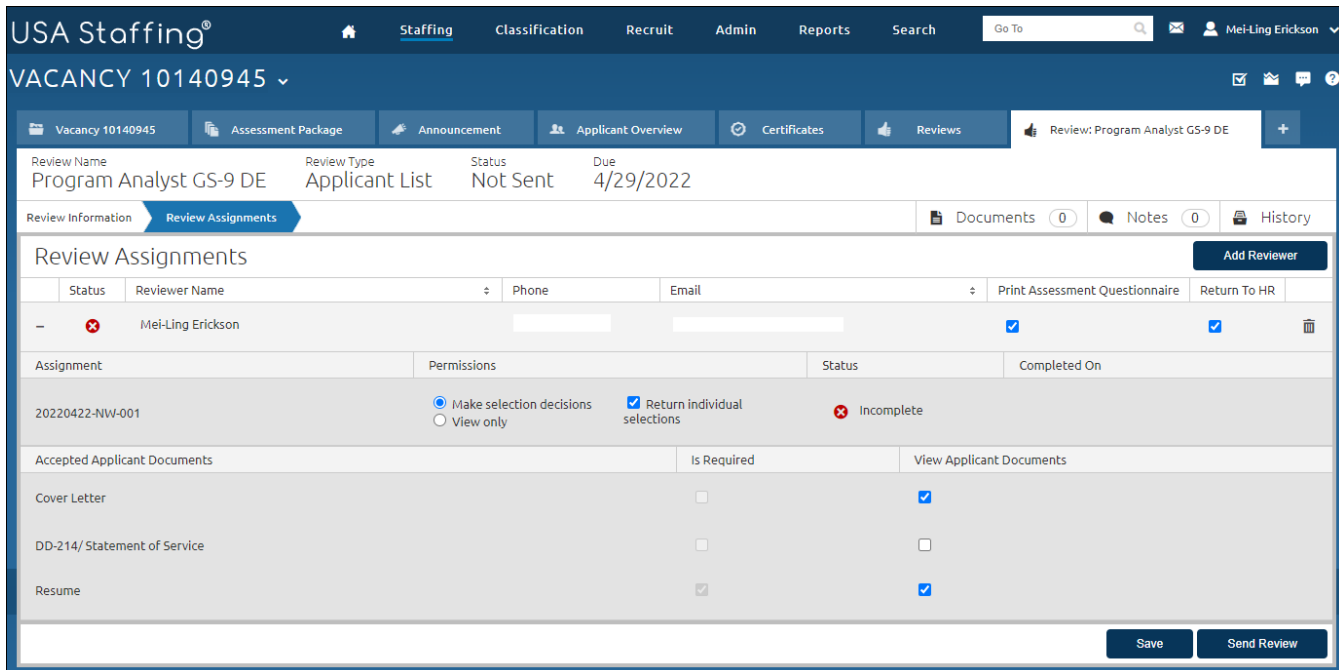


Image 5: Review Assignments page as specified. The Send Review button is in the lower- right quadrant of the page.

- 6. The Sent date will populate at the top of the page and the Send Review button will change to Recall Review.

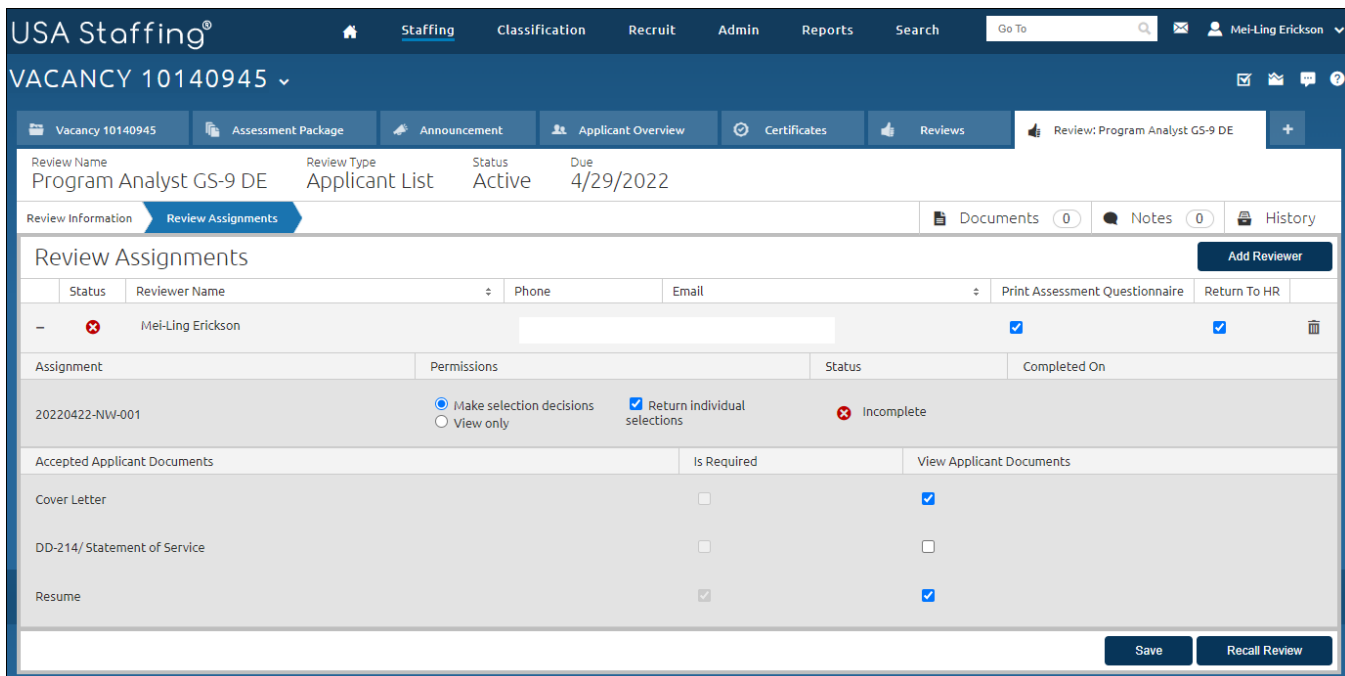


Image 6: The Review Assignments page when a review has been sent. Send Review has changed to Recall Review.

**You have now successfully sent a Review. The e-mail address associated with the Hiring Manager account will receive a message indicating a review is ready. Now you will log in as a Hiring Manager to review the Certificate.**

7. Log into your Hiring Manager User account by clicking the drop-down arrow next to your name. Select **User Type** and click on **Hiring Manager User**. These options will only display if you have a Hiring Manager User profile. If not, consult with your Agency USA Staffing Administrators.

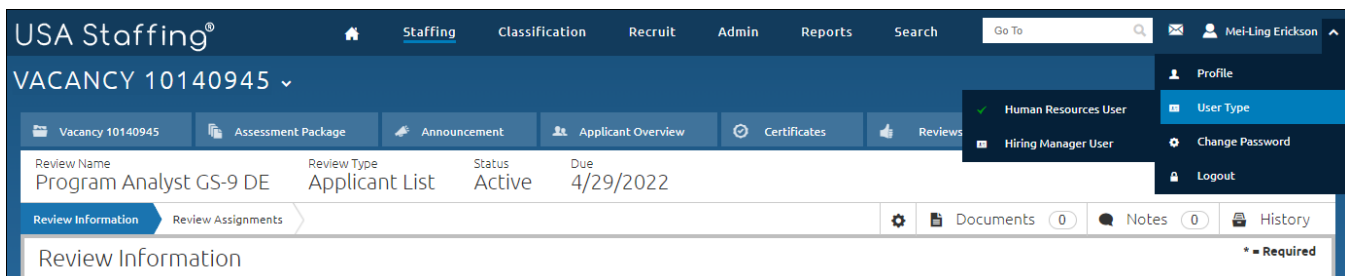


Image 7: How to change User Types. The picture shows the drop-down arrow expanded with the User Type item containing Hiring Manager User and Human Resources User profiles.

8. When you first log in as a Hiring Manager, you will arrive on the Dashboard where you will be taken to **Assignments**.

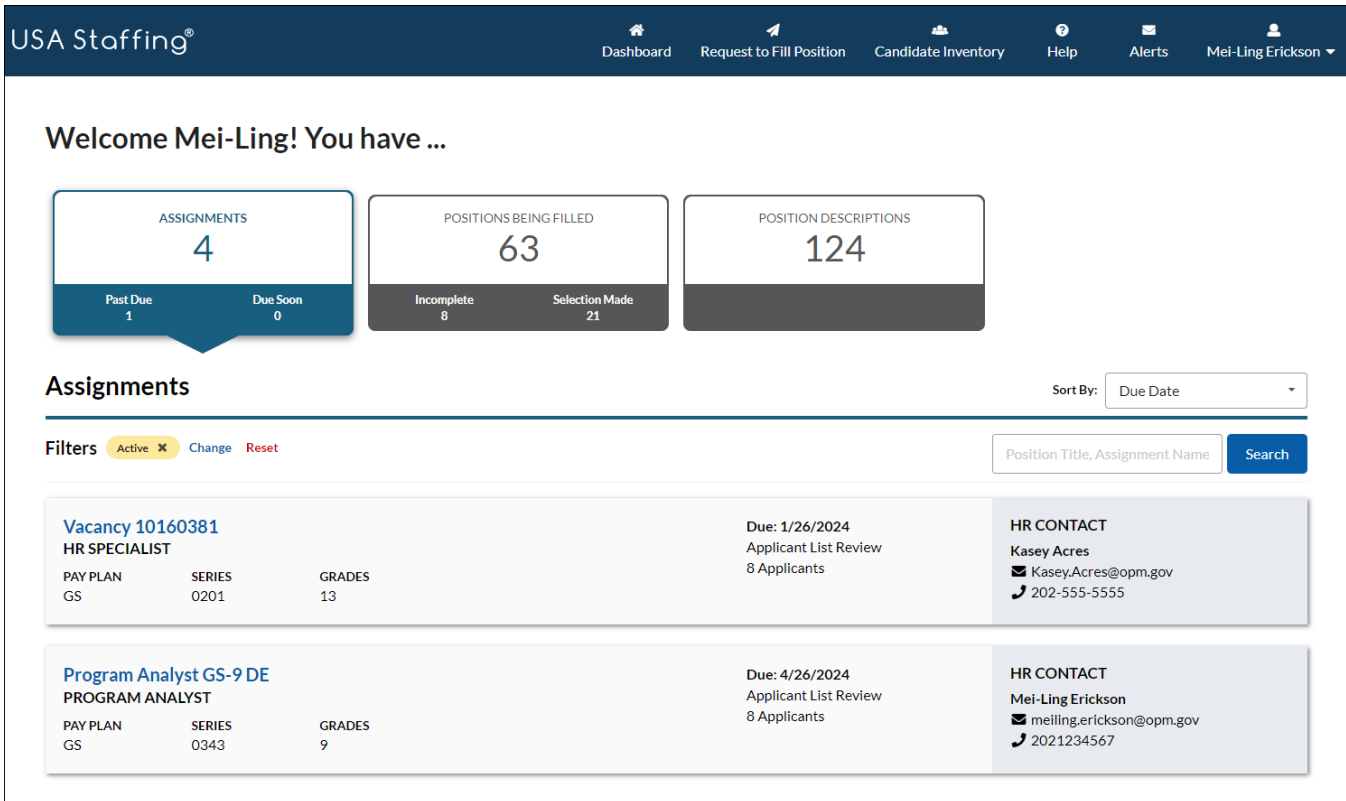


Image 8: The dashboard page of a Hiring Manager account.

9. Under Assignments, you can view all active Assignments or use the Filter at the top to search for other Assignments. To begin, click on the **Assignment Name** you want to view.
10. If you included any Review Instructions, they will display. Click the **Close** button to close them.

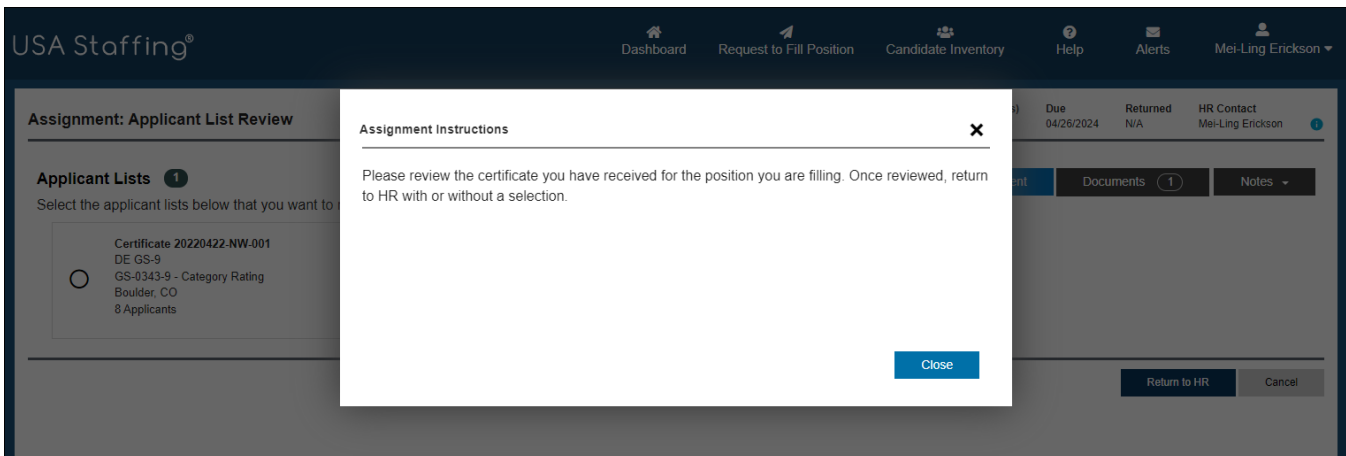


Image 9: Review instructions display as a pop-up.

11. To view your certificate you will need to click the circle next to each of the certificates added to My Assignments. When ready, click the **Review (X) Lists** button.

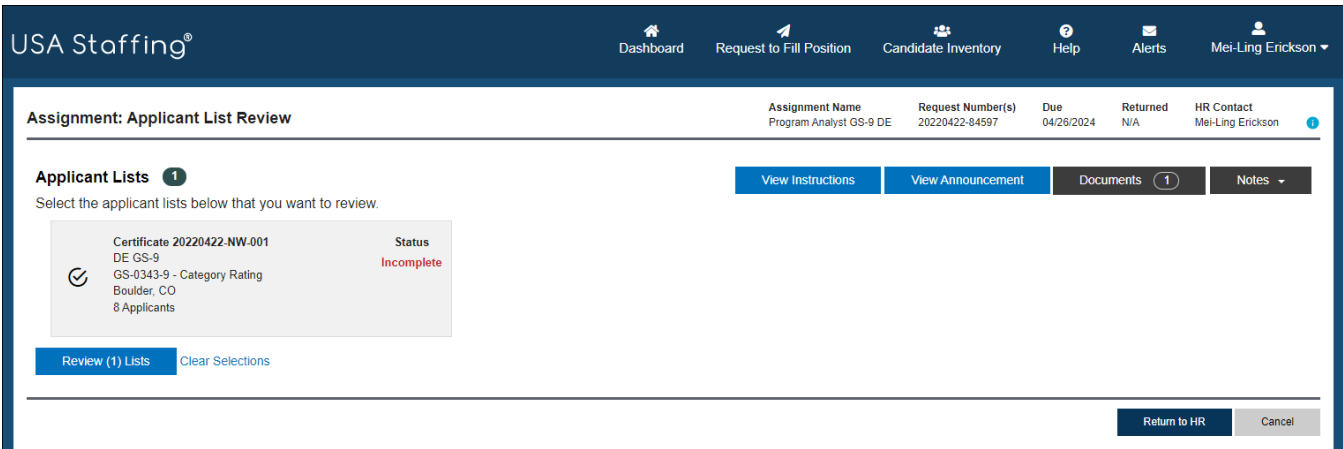


Image 10: Applicant List page with one certificate selected.

12. If you have entered Applicant List instructions, they will pop up. You can click the **Close** button after reading them. This is the Hiring Manager's view of a certificate. At the top of the page, they can view any Case File **Documents** you designated as viewable to HM User. They can also pull up the certificate instructions, print the certificate and/or applicant documents, add certificate filters, and view any notes you designated as viewable to HM User.

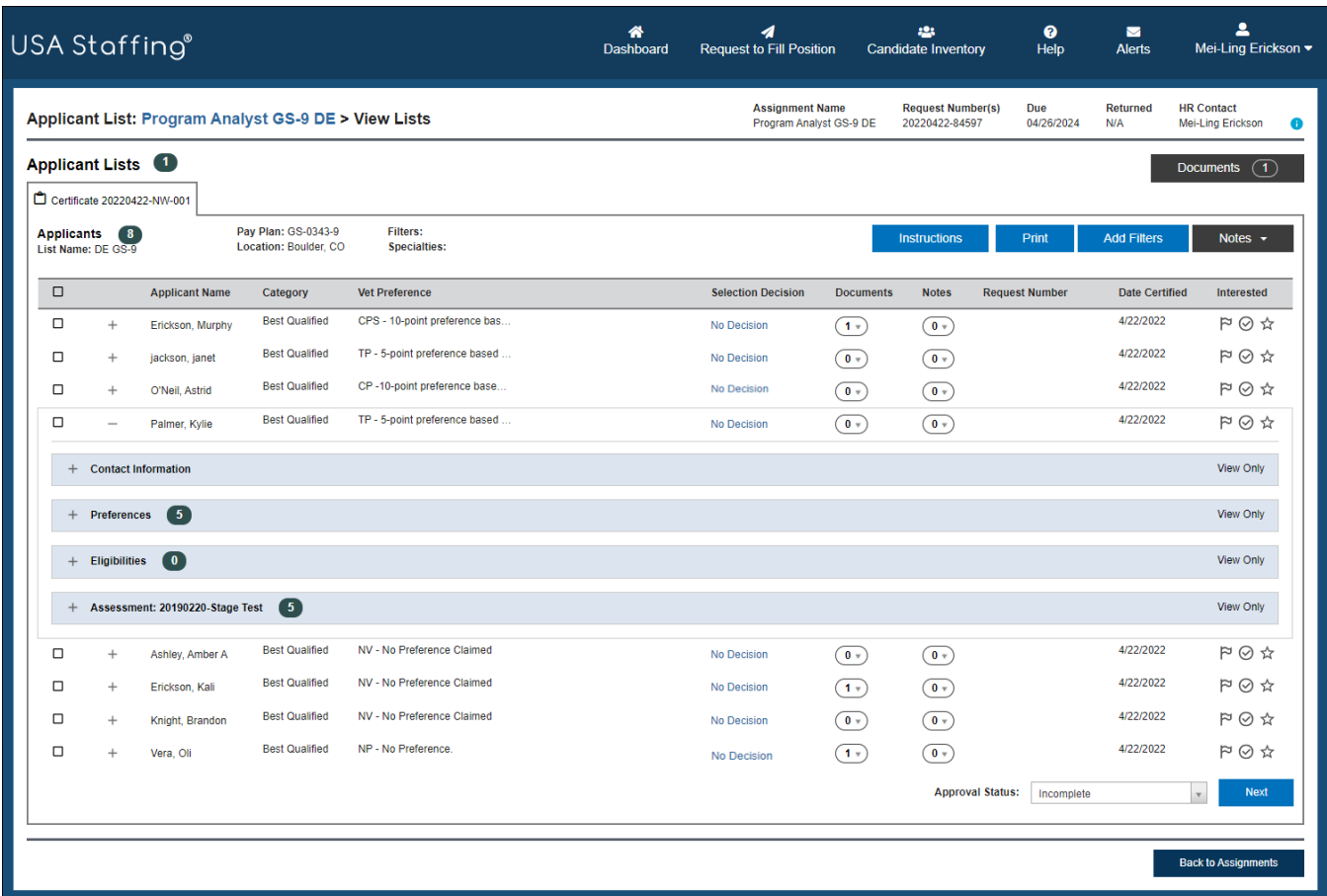


Image 11: Certificate for a Hiring Manager.

13. Depending on the choices you selected as Preferences under the Certificate Information, your Hiring Manager may be able to view additional information by clicking the + next to an applicant's name. In the example below, we granted the Hiring Manager access to everything so you can see the applicant's Preferences, Eligibilities, and responses to the Assessment Questionnaire by clicking the + next to any of the item headers.

**Applicant List: Program Analyst GS-9 DE > View Lists**

Assignment Name: Program Analyst GS-9 DE | Request Number(s): 20220422-84597 | Due: 04/26/2024 | Returned: N/A | HR Contact: Mei-Ling Erickson

**Applicant Lists** 1 | **Documents** 1

Certificate 20220422-NW-001

**Applicants** 8 | Pay Plan: GS-0343-9 | Location: Boulder, CO | Filters: Specialties: | [Instructions](#) | [Print](#) | [Add Filters](#) | [Notes](#)

<input type="checkbox"/>	Applicant Name	Category	Vet Preference	Selection Decision	Documents	Notes	Request Number	Date Certified	Interested
<input type="checkbox"/>	+ Erickson, Murphy	Best Qualified	CPS - 10-point preference bas...	No Decision	1	0		4/22/2022	<input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/>
<input type="checkbox"/>	+ jackson, janet	Best Qualified	TP - 5-point preference based ...	No Decision	0	0		4/22/2022	<input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/>
<input type="checkbox"/>	+ O'Neil, Astrid	Best Qualified	CP - 10-point preference base...	No Decision	0	0		4/22/2022	<input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/>
<input type="checkbox"/>	- Palmer, Kylie	Best Qualified	TP - 5-point preference based ...	No Decision	0	0		4/22/2022	<input type="checkbox"/> <input checked="" type="checkbox"/> <input type="checkbox"/>

**+ Contact Information** View Only

**- Preferences** 5 View Only

Select the location(s) you want to be considered for. You must choose at least one location.

<input type="checkbox"/>	Location Label	City	State	Country	County	Code
<input checked="" type="checkbox"/>		Boulder	CO	United States	Boulder County	08020013
<input checked="" type="checkbox"/>		Fairfax County	VA	United States	Fairfax County	51000059

Select the lowest grade you are willing to accept for this position.

9

Select the series you want to be considered for. You must choose at least one series.

0343 - Management And Program Analysis

How did you hear about this job?

USAJOBS  
 Job Fair

Are you willing to travel for this position?

Yes  
 No

**+ Eligibilities** 0 View Only

**+ Assessment: 20190220-Stage Test** 5 View Only

Image 12: Certificate page with the + expanded next to the top applicant to view each of the allowed sections.

14. To view an applicant's documents, click the **document number indicator** on that row and then click on the **Document Name**. How the document opens is dependent on the browser and configurations your agency uses. To close the documents area, click the **number** again.

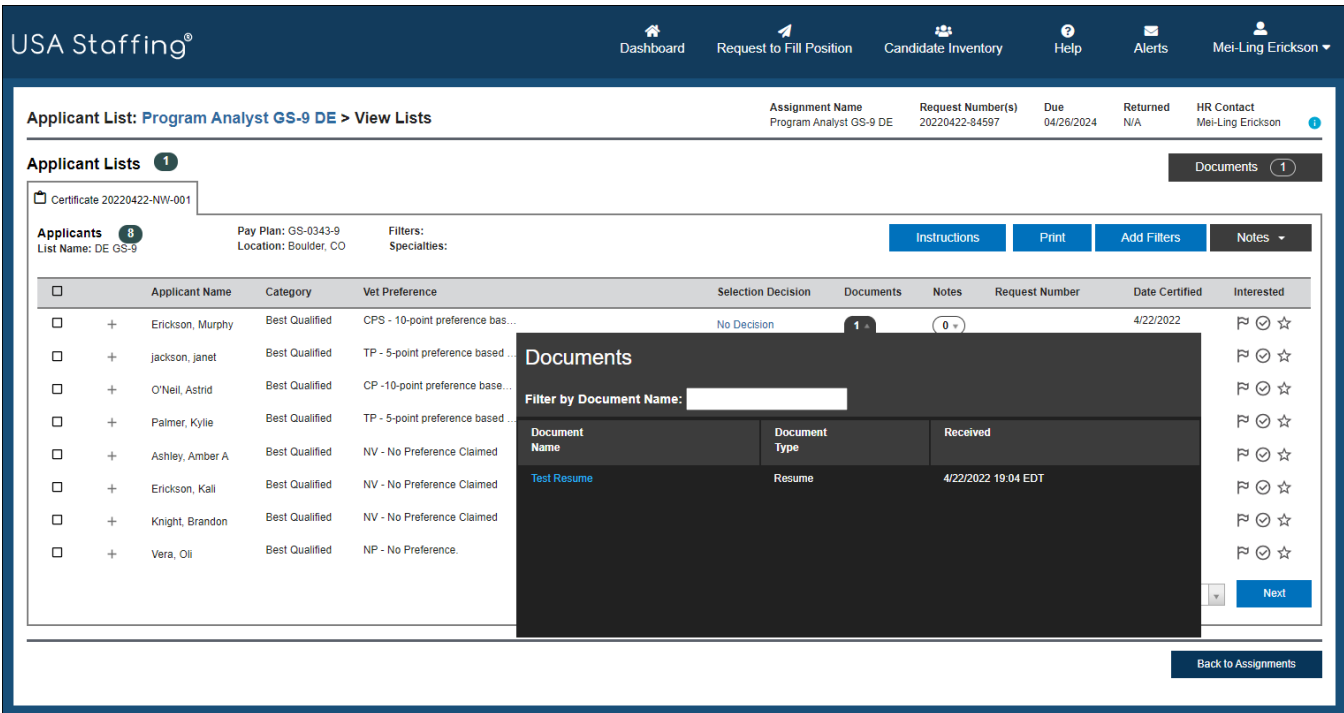


Image 13: Applicant documents open with one document displaying.

15. Hiring Manager can document their selection decisions by:

- Clicking on the **Selection Decision** row for an applicant record. The pop-up will allow them to select the **Decision Code** for that applicant.
- Click the selection boxes next to all applicants that will have the same **Decision Code** and select the **Make Selections** button. (As indicated below.)

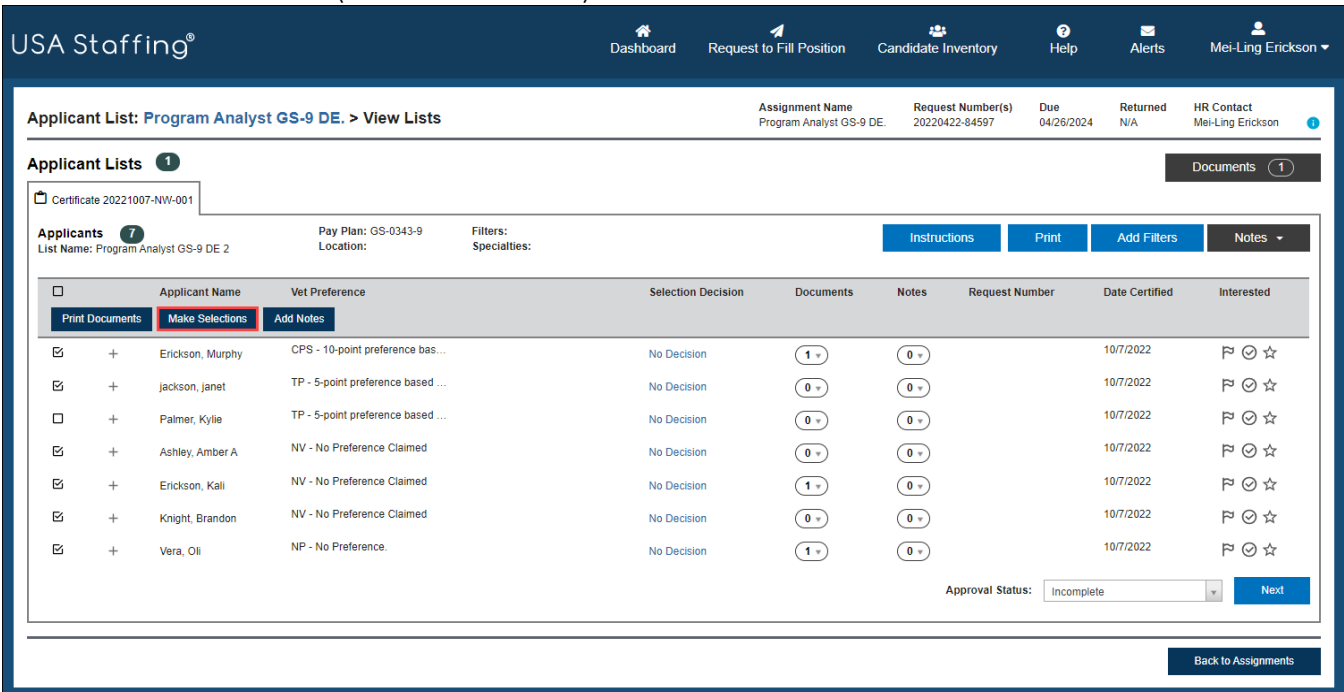


Image 14: Selected all applicants that will have the same **Decision Code** and clicked on Make Selections.

16. Once selection decisions have been documented, the Hiring Manager will change the **Approval Status**. Once done, click the **Next** button.

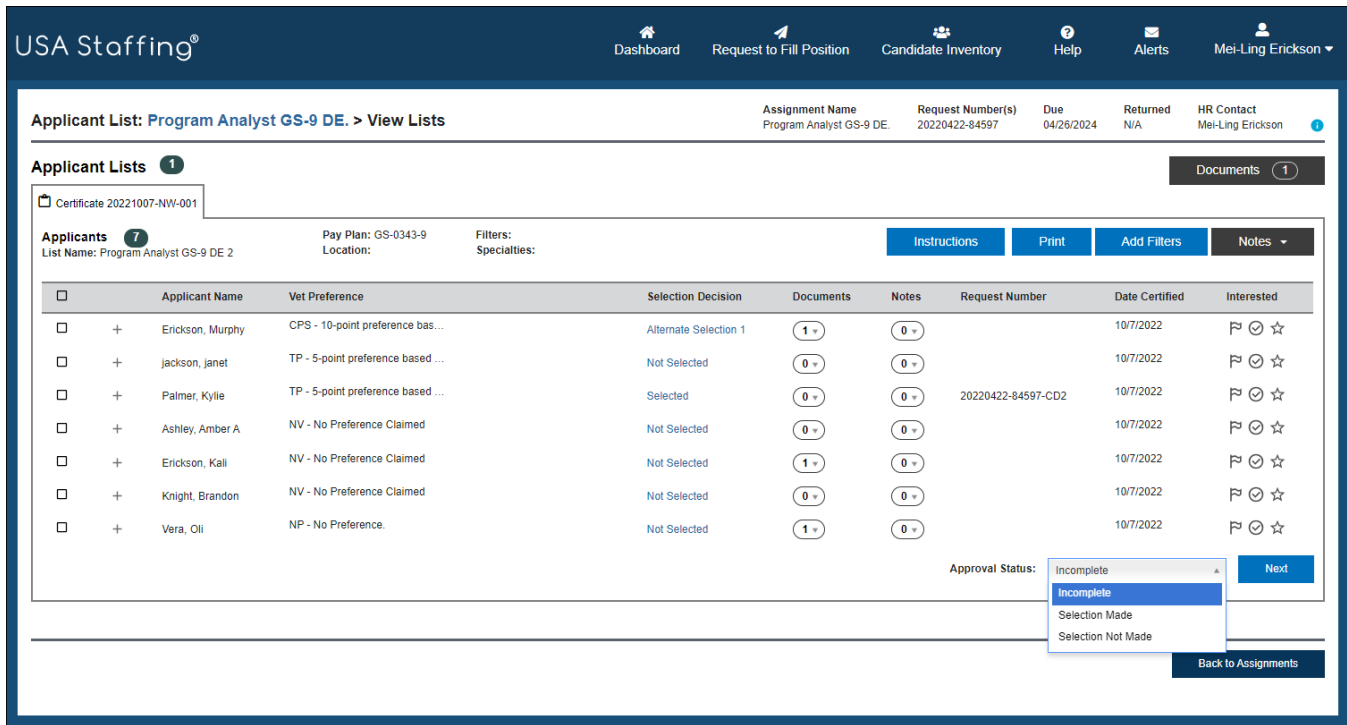


Image 15: All selection decisions are documented and the Approval Status is expanded to see Incomplete, Selection Made, or Selection Not Made.

17. Now the Hiring Manager can Return the Review to HR by clicking the button in the lower right corner of the page.  
**Note:** If that button does not display for a Hiring Manager it means the permission was not granted in the Review on the Review Assignments page.

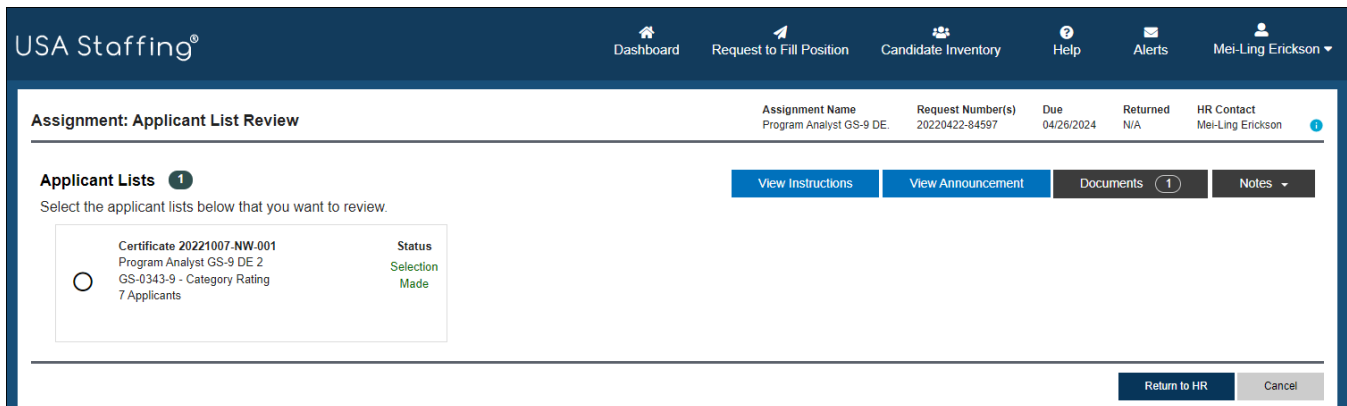


Image 16: Reviews page with the Return to HR button in the lower-right corner.

18. When you Return a Review to HR you will receive a confirmation message. If you are the only Reviewer on the Review, the message will be the one indicated below. If there are multiple Reviewers, you will receive a slightly different message reminding you that returning a Review will make it unavailable to all other Reviewers.

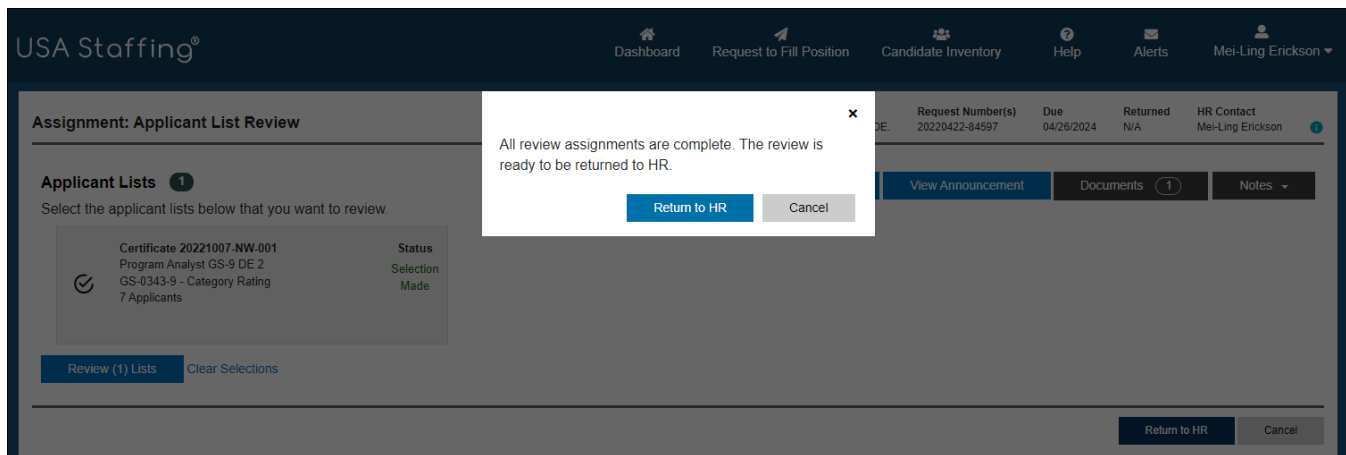


Image 17: Return review confirmation.

19. You will then be returned to the Review page.

**You have now completed the Hiring Manager review. The user designated as the Owner for the Review will receive an e-mail indicating the review has been completed. Additionally, when logged in the HR User will receive an Alert indicator (envelope icon in the upper-left side of the page) letting them know the review has been returned.**

To change your profile back to HR User Type, click the drop-down arrow next to your name. Select **User Type** and click on **Human Resources**. If your account has access to both HR User and the Hiring Manager interface, the system will log you into the last User Type you were logged into. Remember to switch your User Type back to HR User if this is your primary work type.

The screenshot shows the USA Staffing dashboard for user Mei-Ling Erickson. The top navigation bar includes links for Dashboard, Request to Fill Position, Candidate Inventory, Help, and Alerts. The user's name and a dropdown menu are visible in the top right corner. The dropdown menu is expanded, showing options for Profile, Tenants, User Type (expanded to show Human Resources User and Hiring Manager User), and Sign Out. The main content area features a 'Welcome Mei-Ling! You have ...' message followed by three summary cards: Assignments (4 total, 1 Past Due, 0 Due Soon), Positions Being Filled (63 total, 8 Incomplete, 20 Selection Made), and Position Descriptions (124 total). Below these cards is an 'Assignments' section with a 'Sort By: Due Date' dropdown. A filter bar shows 'Active' filters and options to 'Change' or 'Reset'. A search bar is also present. The main assignment card displays details for 'Certificate for 10134311 HR SPECIALIST', including a due date of 12/18/2023, 6 applicants, and HR contact information for Kasey Acres.

**USA Staffing®**

Dashboard Request to Fill Position Candidate Inventory Help Alerts Mei-Ling Erickson

Welcome Mei-Ling! You have ...

**ASSIGNMENTS**  
4  
Past Due 1 Due Soon 0

**POSITIONS BEING FILLED**  
63  
Incomplete 8 Selection Made 20

**POSITION DESCRIPTIONS**  
124

Human Resources User  
 Hiring Manager User

Profile  
Tenants  
User Type  
Sign Out

**Assignments** Sort By: Due Date

Filters Active Change Reset

Position Title, Assignment Name Search

**Certificate for 10134311**  
HR SPECIALIST  
Due: 12/18/2023  
Applicant List Review  
6 Applicants

PAY PLAN	SERIES	GRADES
GS	0201	11

**HR CONTACT**  
Kasey Acres  
Kasey.Acres@opm.gov  
202-555-5555

Image 18: The picture shows the drop-down arrow expanded with the User Type item containing Hiring Manager User and Human Resources User profiles.

**This completes this exercise.**