

eOPF

**Electronic Official
Personnel Folder**

**NOAA Human Resources
Training Guide
Version 3.1
April 2006**

eOPF HR SPECIALIST TRAINING GUIDE

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Part I - Basic User Functions

Chapter 1: Introduction to eOPF

OPM is changing the way agencies maintain and access official personnel folders. Human Resources offices across the country are changing from a paper-based personnel records system to an electronic OPF management system. In the coming months, our current OPF's will be uploaded into the new, web-enabled Electronic Official Personnel Folder (eOPF) solution.

The eOPF solution is designed to electronically store, manage, and distribute OPF documents. eOPF stores all OPF documents in portable document format (PDF) files. Every employee will be able to access his or her own OPF at any time and any place where they can access the internet.

This training session is designed to introduce you to the eOPF solution and to familiarize you with the eOPF functionalities. In this class we will be concerned with HR Specialists and Assistants accessing their own eOPF as well as the eOPFs of their serviced employees.

Chapter 2: Getting Started with eOPF

Before using eOPF, you must first login. Logging in requires a valid user name and password. User accounts will be set up for all current employees when we first deploy eOPF by the use of a PDF Welcome Letter attached to an email sent to each employee's work email address. The employee will use the system generated user ID and the self service "Forgot Password" function to request an initial password. eOPF will generate an email assigning a new password. To access the eOPF system, each employee must change the password to a DOC compliant password.

NOTE: user ID's and passwords are both case-sensitive. If your logon attempt fails, you will need to wait for one minute before your next attempt. Typically, after three (3) consecutive failed attempts to log in to eOPF, that user account will be "locked out" as a security precaution. eOPF administrators must reset the user account after the allowed number of failed logon attempts.

As with all DOC and NOAA passwords, you must remember to safeguard your user ID and password. Some basic guidelines for maintaining your password are as follows:

- Do not share your password with anyone
- Do not let anyone logon with your eOPF user ID or password because eOPF logs and tracks all actions to the user ID.

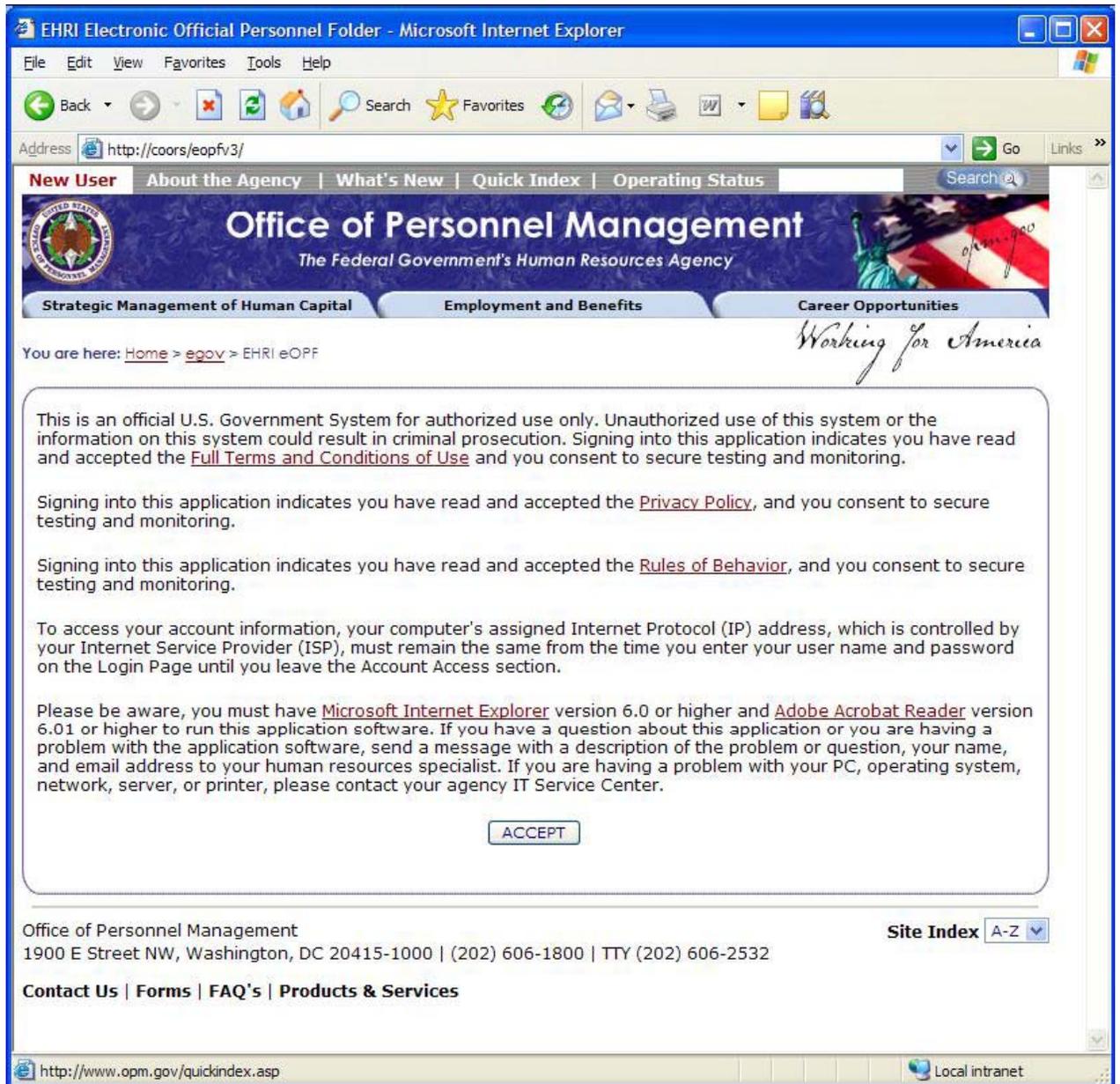
Logging on to eOPF

You must log on to the eOPF each time you want to access the system. After you log on to eOPF, you can change your password.

To Log on to eOPF:

1. Launch your Internet browser.
2. Maximize the browser to utilize the entire page.
3. Type the designated Address for **eOPF**:

The **eOPF User Agreement** page appears.



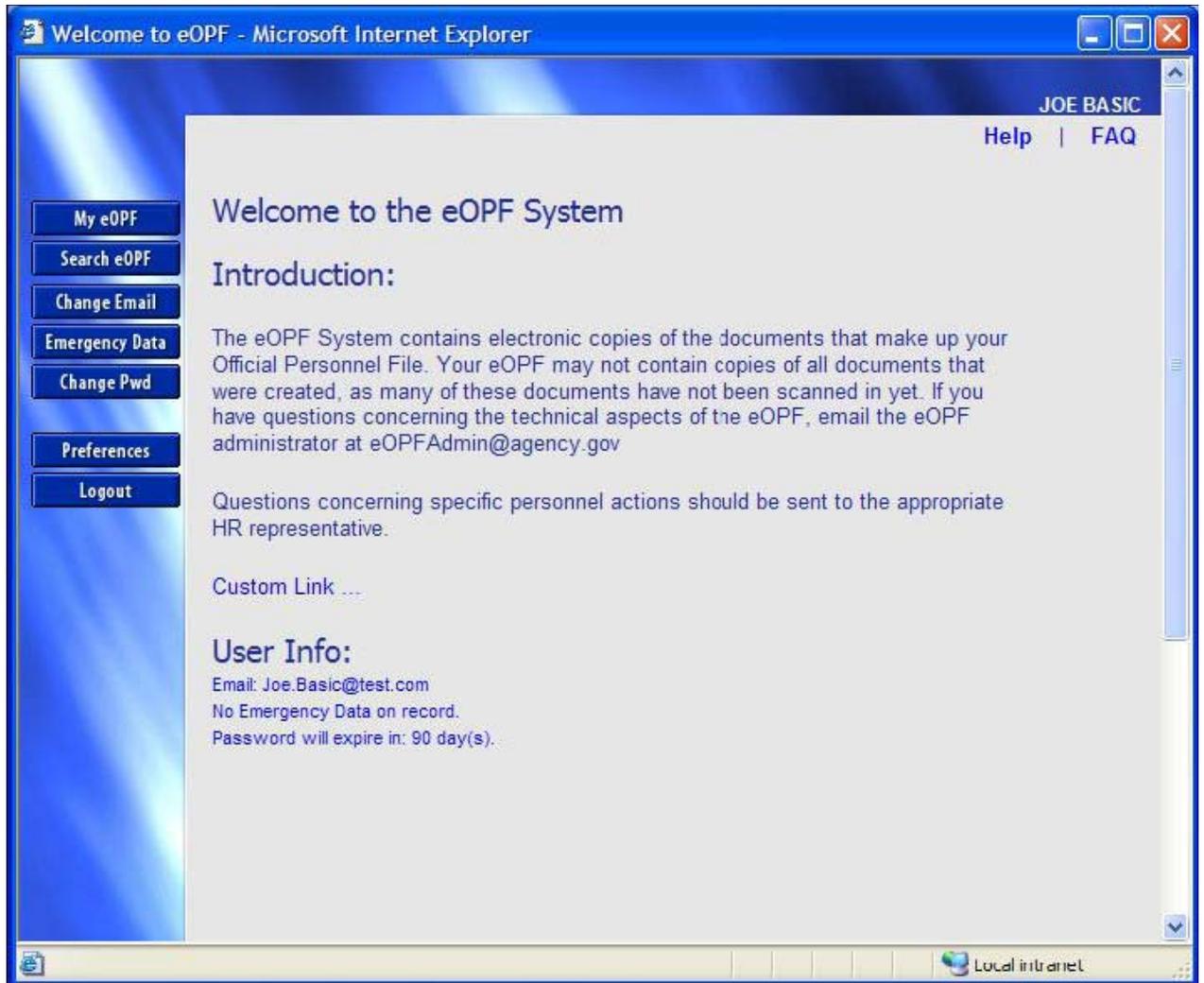
4. Click the **ACCEPT** button, after reading the **User Agreement statement**. The **eOPF Web Logon** page appears.



5. Type your eOPF ID in the **eOPF ID** field.

6. Type your Password in the **Password** field (if you are a new user, click on New User - Request your Password).

7. Click the  **Submit** button. The **eOPF Welcome** page appears.



Using the Main Menu Buttons

The eOPF main menu buttons display in the left hand margin of your eOPF pages.

Note:

The main menu options may appear slightly different from the example above. The main menu buttons vary depending on the eOPF group functional access that has been granted to you by the eOPF administrator.

Managing Your eOPF Password

Password Policies

eOPF gives you the ability to change your password at any time. For example, your password may have been compromised,

or you may wish to change it to something more easily remembered.

Your new password must adhere to the requirements defined by DOC. The eOPF administrator can configure the password requirement settings such as a 90-day expiration date.

To Change Your Password:

1. From the **eOPF Welcome** page, click the **Change Pwd** button on the main menu bar.



The **Change Password** page displays.

A screenshot of a web browser window titled "eOPF - Change Password - Microsoft Internet Explorer". The page has a blue header and a left sidebar with buttons for "My eOPF", "Search eOPF", "Change Email", "Emergency Data", "Change Pwd", "Preferences", and "Logout". The main content area is titled "Change Password :" and includes the text "Allow user to change Password." Below this are three input fields labeled "Old Password:", "New Password:", and "Verify Password:". At the bottom of the form are two buttons: "UPDATE" with a refresh icon and "CANCEL" with a red prohibition sign.

2. Enter your current password in the **Old Password** field.
3. In the **New Password** field, enter your new password.
4. In the **Verify Password** field, enter your new password again.

5. Click the  **Update** button.

6. For this training, we will not be changing passwords.

Click the  **Cancel** button to cancel the password change.

Changing Your E-Mail Address

The eOPF solution notifies users via e-mail when new eOPF documents are added to their file; therefore, if your e-mail address changes it is important that you update it in the system. eOPF allows all users to change their e-mail address.

To Change Your E-Mail Address:

1. Click the **Change Email** button. The **Email Address** page appears.



2. Type your e-mail address in the **Your Email Address** field.
3. Click the  **Update** button.

The **eOPF Welcome** page appears with the updated e-mail address displayed.

Viewing and Updating Emergency Data

eOPF allows you to enter emergency contact information. This information is available to your supervisor and/or HR personnel for emergency use only.

To View and Update Emergency Data:

1. Click the **Emergency Data** button from the main menu.

The **Emergency Contact Information** page appears.

eOPF - Emergency Data - Microsoft Internet Explorer

JOE BASIC
[Help](#) | [FAQ](#)

Emergency Contact Information :

ENTRY OF THE FOLLOWING INFORMATION IS VOLUNTARY.

Disclosure Statement: This information may be used to notify the individuals of your choice should you be taken ill or injured during work. This information will be available to your supervisor and Human Resource personnel for emergency use only. This information is not to be used for any other purpose. A log is kept showing any time this information is viewed and or changed. Only the individual employee is authorized to change this data.

APPLY  CANCEL 

User Info :

Last Name : BASIC First Name : JOE Initials : JB

SSN : 000-00-1111 Last Updated:

Home Address: 12345 Home St. Work Address:

Address (cont): City:

City : Home Town State/Country:

State/Country: VA Zip/Postal Code:

Zip/Postal Code: 22222 Bldg Name/Location:

Notify First: **Notify Second:**

Last Name : Last Name :

First Name : First Name :

Relationship : Relationship :

Street 1 : Street 1 :

Street 2 : Street 2 :

City : City :

State/Country : State/Country :

Zip : Zip :

E-Mail : E-Mail :

Home Phone : Home Phone :

Done Local intranet

2. Edit the desired fields and click the  **Apply** button. The **Emergency Contact Information** page reappears displaying the message "Emergency data updated successfully."

Accessing Online Help

You can access eOPF online help by clicking on the **HELP** link at the top of an eOPF Web page. From the **HELP** page, you can jump to topics of interest.

Accessing Frequently Asked Questions

The eOPF provides access to a **Frequently Asked Questions (FAQ)** page. The **FAQ** page can be accessed by clicking on the **FAQ** link provided at the top of all eOPF pages. Accessing the **FAQ** page allows access to current eOPF information. For example, the **FAQ** page may post information about:

- Frequently asked questions and answers
- What's new
- Discuss technical issues
- How to contact eOPF support; and
- General information about eOPF solution access

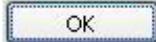
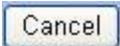
Logging out of eOPF

In order to ensure the security of the eOPF solution, remember to log out of the system when you are finished.

Note:

You will be automatically logged out of the eOPF system after the system is idle for 15 minutes. (This setting is configurable by the administrator.)

To Log out of eOPF:

1. Click the  **Logout** button.
2. Click the  **OK** button to logout of eOPF and automatically close the browser window. Click the  **Cancel** button to return to eOPF and continue working.

Part II – HR Functions

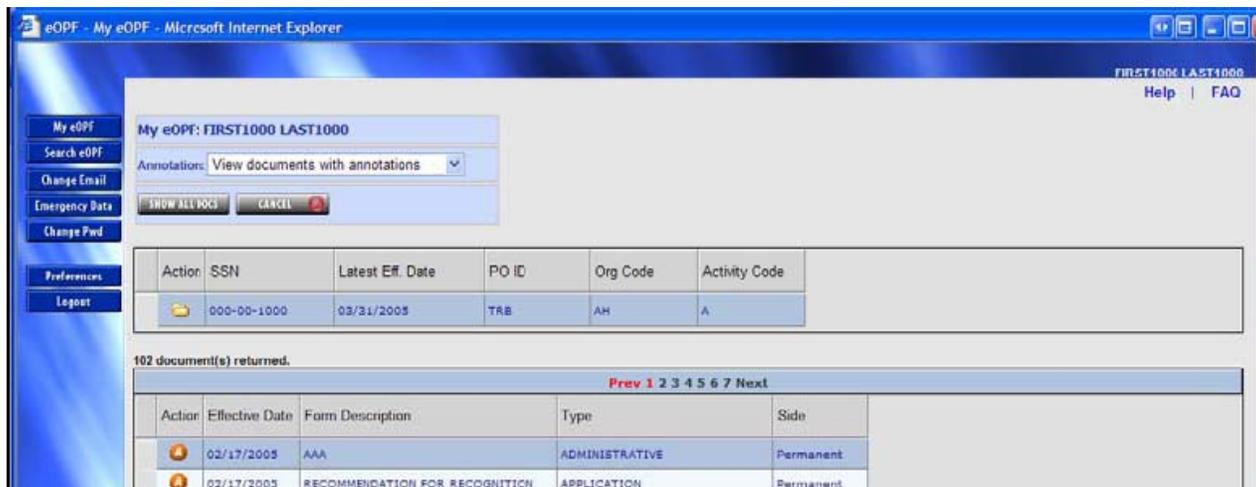
Chapter 3: Viewing eOPF Documents

eOPF organizes and manages personnel documents within an electronic folder. Every DOC employees has an eOPF with all of his or her personnel documents organized in the same manner as the traditional paper OPF.

Once logged into eOPF you can click on either the My eOPF button to access your OPF information or the Search eOPF button to locate files for your reporting employees.

Viewing Your Own eOPF

1. To view all contents of your eOPF in order by effective date, click on **My eOPF**. This will bring up your **My eOPF Results** page. Your name is displayed on the upper right corner of the page. The **My eOPF Results** page automatically opens your folder and lists its contents.



To view a document from My eOPF:

2. From the **Annotation** drop-down list, select whether to view the document with or without public annotations. The default is to "View documents with annotations". As an employee you have the right to view the public annotations in your folder.

3. Click the **Action** icon corresponding to the document you wish to view and select the **View** option from the drop-down list. You will be prompted to open or save the document using Adobe reader.

NOTE:

Every time an eOPF document is viewed, that action is logged electronically.

Standard Form 52 Rev. 7/91 U.S. Office of Personnel Management FPM Supp. 296-33, Subch. 3		REQUEST FOR PERSONNEL ACTION	
PART A - Requesting Office (Also complete Part B, Items 1, 7-22, 32, 33, 36, and 39.)		2. Request Number	
1. Actions Requested EOPF TEST1		EWP23093	
3. For Additional Information Call (Name and Telephone Number) EOPF TEST2		4. Proposed Effective Date 04/12/2002	
5. Action Requested By (Typed Name, Title, Signature, and Request Date) EOPF TEST 11/28/2000		6. Action Authorized by (Typed Name, Title, Signature, and Concurrence Date) EOPF TEST3	
PART B - For Preparation of SF 50 (Use only codes in FPM Supplement 292-1. Show all dates in month-day-year order.)			
1. Name (Last, First, Middle) Green, Beth		2. Social Security Number 111-11-1111	3. Date of Birth 03/12/1955
		4. Effective Date 03/11/2000	
FIRST ACTION		SECOND ACTION	
5-A. Code 702	5-B. Nature of Action Promotion	6-A. Code 665	6-B. Nature of Action test
5-C. Code N6M	5-D. Legal Authority Reg 335.102 Career Prom	6-C. Code	6-D. Legal Authority
5-E. Code	5-F. Legal Authority	6-E. Code	6-F. Legal Authority
7. FROM: Position Title and Number CONTRACT ADMINISTRATOR		15. TO: Position Title and Number CONTRACT ADMINISTRATOR	

Searching for Specific Documents in your eOPF

You can search for and display specific documents in your eOPF using the Search eOPF function. This may be helpful if you are searching for a specific document type or documents created in a specified period of time. For more information on searching in your own OPF, see pages 18-23 in the eOPF User Guide for employees.

Searching for an eOPF:

In eOPF, HR users can search and retrieve documents for an individual employee by entering the SSN, employee ID or the employee's name. HR users can refine the search with other parameters, such as document effective date or form type or name. A more expansive list of documents from multiple eOPFs can be retrieved by using search criteria such as the POI.

You can restrict your search for an eOPF folder by entering several criteria on the **Search Folders** page.

To search for an eOPF:

1. Click the **Search eOPF** button from the main menu. The **Search Folders** page opens.

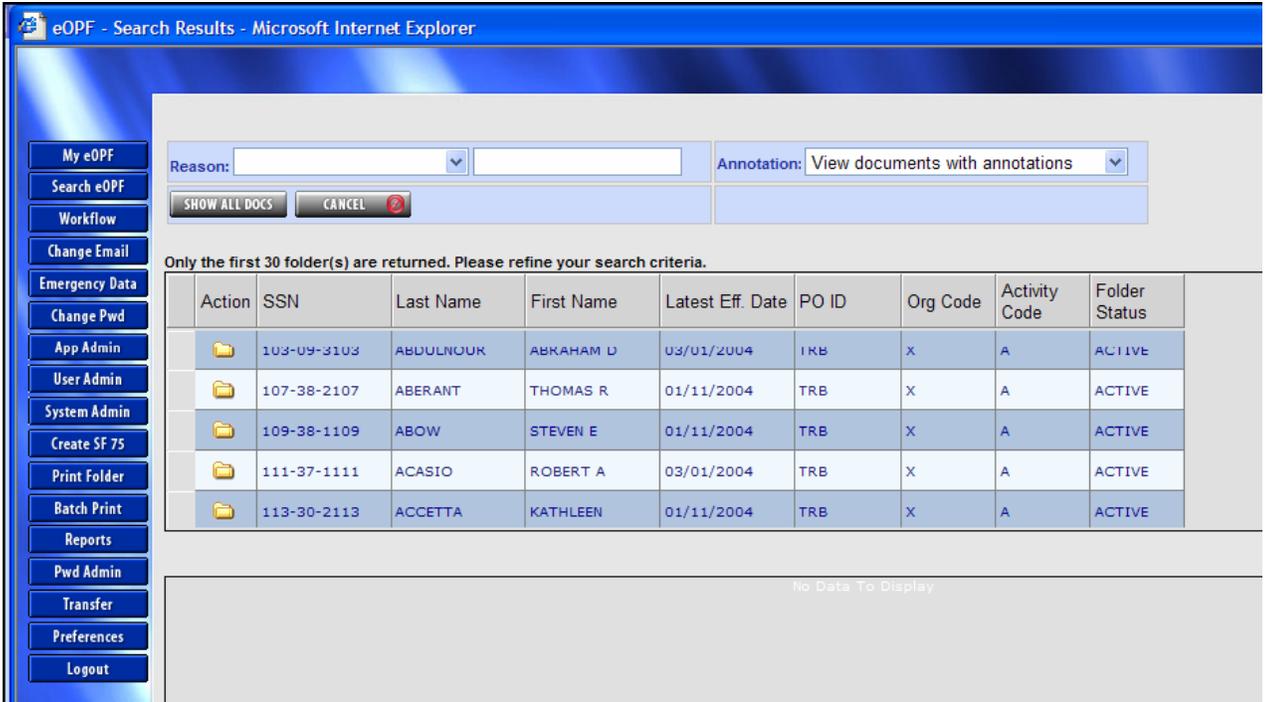
This page allows you to query by such fields as SSN and Last Name.

2. Enter the search criteria for particular eOPF document(s).

Hints:

- ❖ Enter SSN with or without hyphens
- ❖ Use the Wild Card (will search on anything before or after % sign)
- ❖ **Include Empty Folders** allows you to list folders with no documents, such as those for new employees

- Click the  Search button. The **Search Results** page appears. On this example, the search may have been based on the POI (TEST).



eOPF - Search Results - Microsoft Internet Explorer

Reason: Annotation: View documents with annotations

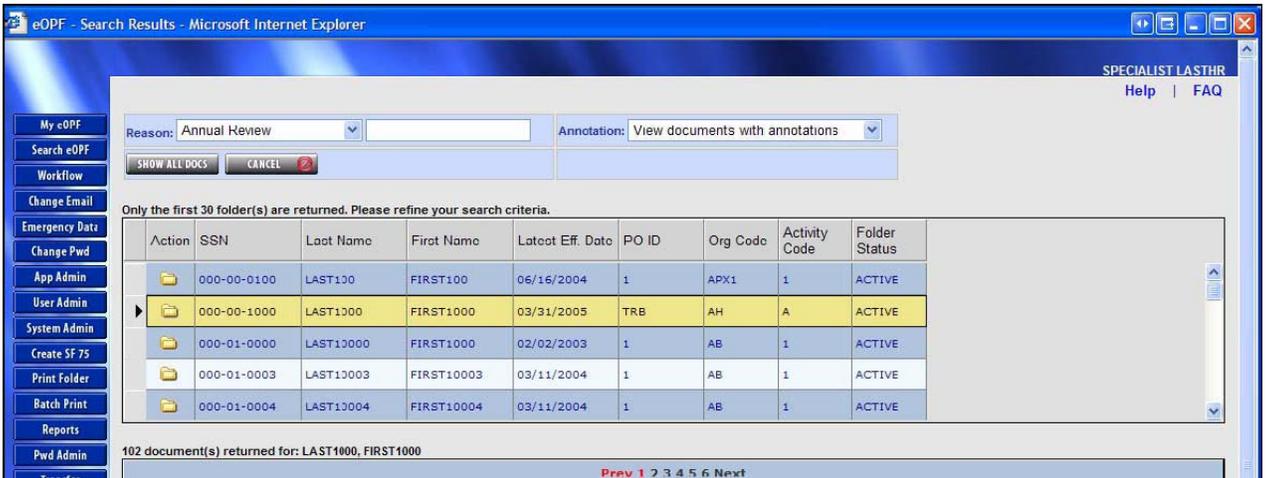
SHOW ALL DOCS CANCEL

Only the first 30 folder(s) are returned. Please refine your search criteria.

Action	SSN	Last Name	First Name	Latest Eff. Date	PO ID	Org Code	Activity Code	Folder Status
	103-09-3103	ABDULNOUR	ABRAHAM D	03/01/2004	1RB	X	A	ACTIVE
	107-38-2107	ABERANT	THOMAS R	01/11/2004	TRB	X	A	ACTIVE
	109-38-1109	ABOW	STEVEN E	01/11/2004	TRB	X	A	ACTIVE
	111-37-1111	ACASIO	ROBERT A	03/01/2004	TRB	X	A	ACTIVE
	113-30-2113	ACCETTA	KATHLEEN	01/11/2004	TRB	X	A	ACTIVE

No Data To Display

- Select a folder by clicking on the **Folder** icon for the folder you wish to see and Select the **Open** option from the drop-down list to display the documents contained in the chosen folder. The **Document List** page displays for that folder.



eOPF - Search Results - Microsoft Internet Explorer

Reason: Annual Review Annotation: View documents with annotations

SHOW ALL DOCS CANCEL

Only the first 30 folder(s) are returned. Please refine your search criteria.

Action	SSN	Last Name	First Name	Latest Eff. Date	PO ID	Org Code	Activity Code	Folder Status
	000-00-0100	LAST100	FIRST100	06/16/2004	1	APX1	1	ACTIVE
	000-00-1000	LAST1000	FIRST1000	03/31/2005	TRB	AH	A	ACTIVE
	000-01-0000	LAST10000	FIRST1000	02/02/2003	1	AB	1	ACTIVE
	000-01-0003	LAST10003	FIRST10003	03/11/2004	1	AB	1	ACTIVE
	000-01-0004	LAST10004	FIRST10004	03/11/2004	1	AB	1	ACTIVE

102 document(s) returned for: LAST1000, FIRST1000

Prev 1 2 3 4 5 6 Next

Action	Side By Side	Effective Date	Form Number	Form Description	Type	NOA Code 1	NOA Code 2	Side	Exception Comment
A		02/17/2005	AF 1001	RECOMMENDATION FOR RECOGNITION	APPLICATION			Permanent	
A		02/17/2005	AAA	AAA	ADMINISTRATIVE	962		Temporary	
A		02/17/2005	AAA	AAA	ADMINISTRATIVE	962		Permanent	
A		02/08/2005	AF 2584	RECORD OF PERSONNEL SECURITY INVESTIGATION AND CLEARANCE	EXCEPTION			Temporary	
A		06/23/2004	AF 1001	RECOMMENDATION FOR RECOGNITION	APPLICATION			Permanent	
A		02/02/1984	SF 50	NOTIFICATION OF PERSONNEL ACTION	RECREATION OF RESUBMISSION OF A CPDF	005		Permanent	
A		02/02/1984	SF 50	NOTIFICATION OF PERSONNEL ACTION	RECREATION OF RESUBMISSION OF A CPDF	005		Permanent	
A		02/02/1984	SF 50	NOTIFICATION OF PERSONNEL ACTION	CORRECTION OF CURRENT CPDF FILE	007		Permanent	
A		02/02/1984	SF 50	NOTIFICATION OF PERSONNEL ACTION	CORRECTION OF CURRENT CPDF FILE	007		Permanent	
A		02/02/1984	SF 50	NOTIFICATION OF PERSONNEL ACTION	CAREER APPT	100		Permanent	
A		02/02/1984	SF 50	NOTIFICATION OF PERSONNEL ACTION	CAREER APPT	100		Permanent	
A		02/02/1984	SF 50	NOTIFICATION OF PERSONNEL ACTION	CAREER APPT	100		Permanent	
A		02/02/1973	CSC 493	APPLICATION TO ESTABLISH ELIGIBILITY FOR CONVERSION TO CAREER-	APPOINTMENT SUPPORT			Temporary	

-OR-

Click the **SHOW ALL DOCS** Show All Docs button to list all documents that meet your search criteria. The **Show All Documents** page is displayed.

102 documents returned.

To print a document(s), click on the checkbox to select/deselect and then click on the Print Single Sided or Print Double Sided button.

PRINT SINGLE SIDED PRINT DOUBLE SIDED PRINT WINDOW DELETE SELECTED ADD TO CLIP CANCEL

CHECK ALL UNCHECK ALL

	Last Name	First Name	Effective Date	Form Number	Type	NOA Code 1	Side	Exception Comment	Create Date	Print	Folder Status
<input type="checkbox"/>	LAST1000	FIRST1000	02/17/2005	AF 1001	APPLICATION		Permanent		02/17/2005	Single	ACTIVE
<input type="checkbox"/>	LAST1000	FIRST1000	02/17/2005	AAA	ADMINISTRATIVE	962	Temporary		02/17/2005	Single	ACTIVE
<input type="checkbox"/>	LAST1000	FIRST1000	02/17/2005	AAA	ADMINISTRATIVE	962	Permanent		02/17/2005	Single	ACTIVE
<input type="checkbox"/>	LAST1000	FIRST1000	02/08/2005	AF 2584	EXCEPTION		Temporary		02/08/2005	Single	ACTIVE
<input type="checkbox"/>	LAST1000	FIRST1000	06/23/2004	AF 1001	APPLICATION		Permanent		06/22/2004	Single	ACTIVE
<input type="checkbox"/>	LAST1000	FIRST1000	02/02/1984	SF 50	RECREATION OF RESUBMISSION OF A CPDF RECORD	005	Permanent		03/09/2004	Single	ACTIVE
<input type="checkbox"/>	LAST1000	FIRST1000	02/02/1984	SF 50	RECREATION OF RESUBMISSION OF A CPDF RECORD	005	Permanent		03/09/2004	Single	ACTIVE
<input type="checkbox"/>	LAST1000	FIRST1000	02/02/1984	SF 50	CORRECTION OF CURRENT CPDF FILE	007	Permanent		03/09/2004	Single	ACTIVE
<input type="checkbox"/>	LAST1000	FIRST1000	02/02/1984	SF 50	CORRECTION OF CURRENT CPDF FILE	007	Permanent		03/09/2004	Single	ACTIVE
<input type="checkbox"/>	LAST1000	FIRST1000	02/02/1984	SF 50	CAREER APPT	100	Permanent		03/09/2004	Single	ACTIVE
<input type="checkbox"/>	LAST1000	FIRST1000	02/02/1984	SF 50	CAREER APPT	100	Permanent		03/09/2004	Single	ACTIVE
<input type="checkbox"/>	LAST1000	FIRST1000	02/02/1984	SF 50	CAREER APPT	100	Permanent		03/09/2004	Single	ACTIVE
<input type="checkbox"/>	LAST1000	FIRST1000	02/02/1973	CSC 493	APPOINTMENT SUPPORT		Temporary		03/09/2004	Single	ACTIVE
<input type="checkbox"/>	LAST1000	FIRST1000	02/02/1973	CSC 493	APPOINTMENT SUPPORT		Temporary		03/09/2004	Single	ACTIVE
<input type="checkbox"/>	LAST1000	FIRST1000	02/02/1973	CSC 493	APPOINTMENT SUPPORT		Temporary		03/09/2004	Single	ACTIVE
<input type="checkbox"/>	LAST1000	FIRST1000	02/02/1973	CSC 617	APPOINTMENT SUPPORT		Temporary		03/09/2004	Single	ACTIVE
<input type="checkbox"/>	LAST1000	FIRST1000	02/02/1973	CSC 617	APPOINTMENT SUPPORT		Temporary		03/09/2004	Single	ACTIVE
<input type="checkbox"/>	LAST1000	FIRST1000	02/02/1973	CSC 618	APPOINTMENT SUPPORT		Temporary		03/09/2004	Single	ACTIVE
<input type="checkbox"/>	LAST1000	FIRST1000	02/02/1973	CSC 618	APPOINTMENT SUPPORT		Temporary		03/09/2004	Single	ACTIVE
<input type="checkbox"/>	LAST1000	FIRST1000	02/02/1973	CSC 618	APPOINTMENT SUPPORT		Temporary		03/09/2004	Single	ACTIVE
<input type="checkbox"/>	LAST1000	FIRST1000	02/02/1973	DG 39	APPOINTMENT SUPPORT		Temporary		03/09/2004	Single	ACTIVE

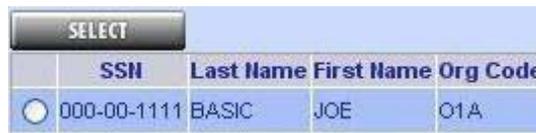
NOTE: Each time you view an eOPF document that is not your own, the action is logged electronically capturing

your eOPF ID, date/time, and reason for viewing the document.

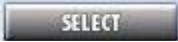
To search folders by name:

1. On the **Search Folders** page, enter all or part of the **Last Name** and/or **First Name** and then click the  Name Search button.

This figure shows search results from entering "L" in the **Last Name** field.



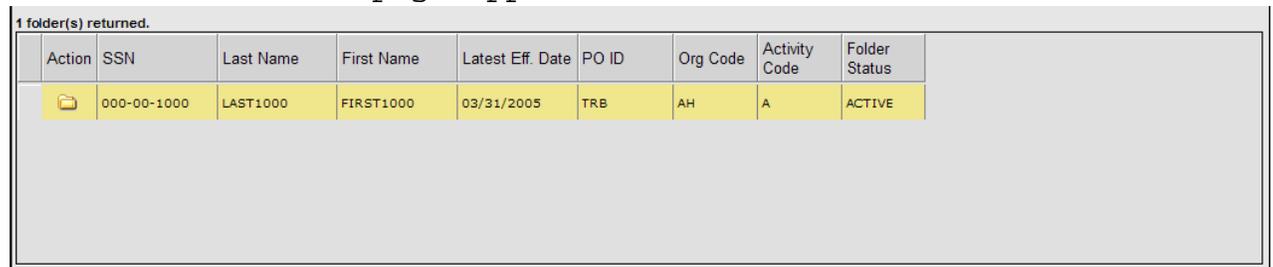
<input type="button" value="SELECT"/>				
	SSN	Last Name	First Name	Org Code
<input checked="" type="radio"/>	000-00-1111	BASIC	JOE	O1A

2. Select the Name of the employee by clicking on the radio button and then click the  **Select** button.

The **Search** page is refreshed and the SSN, first name and last name fields are populated with the selected employee data.

3. Click the  **Search** button.

The **Search Results** page appears.



1 folder(s) returned.

Action	SSN	Last Name	First Name	Latest Eff. Date	PO ID	Org Code	Activity Code	Folder Status
	000-00-1000	LAST1000	FIRST1000	03/31/2005	TRB	AH	A	ACTIVE

Since **Search Results** in this example resulted in only one folder, the resulting folder is opened in the document list

below.

02 document(s) returned for: LAST1000, FIRST1000									
Prev 1 2 3 4 5 6 7 Next									
Action	Side By Side	Effective Date	Form Number	Form Description	Type	NOA Code 1	NOA Code 2	Side	Excep Comr
		02/17/2005	AF 1001	RECOMMENDATION FOR RECOGNITION	APPLICATION			Permanent	
		02/17/2005	AAA	AAA	ADMINISTRATIVE	962		Temporary	
		02/17/2005	AAA	AAA	ADMINISTRATIVE	962		Permanent	
		02/08/2005	AF 2584	RECORD OF PERSONNEL SECURITY INVESTIGATION AND CLEARANCE	EXCEPTION			Temporary	
		06/23/2004	AF 1001	RECOMMENDATION FOR RECOGNITION	APPLICATION			Permanent	
		02/02/1984	SF 50	NOTIFICATION OF PERSONNEL ACTION	RECREATION OF RESUBMISSION OF A CPDF	005		Permanent	
		02/02/1984	SF 50	NOTIFICATION OF PERSONNEL ACTION	RECREATION OF RESUBMISSION OF A CPDF	005		Permanent	
		02/02/1984	SF 50	NOTIFICATION OF PERSONNEL ACTION	CORRECTION OF CURRENT CPDF FILE	007		Permanent	
		02/02/1984	SF 50	NOTIFICATION OF PERSONNEL ACTION	CORRECTION OF CURRENT CPDF FILE	007		Permanent	
		02/02/1984	SF 50	NOTIFICATION OF PERSONNEL ACTION	CAREER APPT	100		Permanent	
		02/02/1984	SF 50	NOTIFICATION OF PERSONNEL ACTION	CAREER APPT	100		Permanent	
		02/02/1984	SF 50	NOTIFICATION OF PERSONNEL ACTION	CAREER APPT	100		Permanent	
		02/02/1973	CSC 493	APPLICATION TO ESTABLISH ELIGIBILITY FOR CONVERSION TO CAREER-	APPOINTMENT SUPPORT			Temporary	

Viewing an eOPF Document

After you locate an eOPF you can view and/or print a document(s) within the folder. NOTE: you must always first enter a reason for accessing the document. This information is recorded in the eOPF history and tracked for audit and reporting purposes.

To View an eOPF Document:

1. Search for and locate the eOPF you wish to view. The **Search Results** page appears with a detailed view of the employee's folder.
2. From the **Search Results** page, click on the Folder  **Action** icon and select the **Open** option to display the documents contained in the chosen folder.

This figure displays the **Search Results** page.

eOPF - Search Results - Microsoft Internet Explorer

SPECIALIST LASTHR
Help | FAQ

Reason: Annual Review Annotation: View documents with annotations

SHOW ALL DOCS CANCEL

Only the first 30 folder(s) are returned. Please refine your search criteria.

Action	SSN	Last Name	First Name	Latest Eff. Date	PO ID	Org Code	Activity Code	Folder Status
	000-00-0100	LAST100	FIRST100	06/16/2004	1	APX1	1	ACTIVE
	000-00-1000	LAST1000	FIRST1000	03/31/2005	TRB	AH	A	ACTIVE
	000-01-0000	LAST10000	FIRST1000	02/02/2003	1	AB	1	ACTIVE
	000-01-0003	LAST10003	FIRST10003	03/11/2004	1	AB	1	ACTIVE
	000-01-0004	LAST10004	FIRST10004	03/11/2004	1	AB	1	ACTIVE

102 document(s) returned for: LAST1000, FIRST1000

Prev 1 2 3 4 5 6 Next

Action	Side By Side	Effective Date	Form Number	Form Description	Type	NOA Code 1	NOA Code 2	Side	Excepci Comme
		02/17/2005	AF 1001	RECOMMENDATION FOR RECOGNITION	APPLICATION			Permanent	
		02/17/2005	AAA	AAA	ADMINISTRATIVE	962		Temporary	
		02/17/2005	AAA	AAA	ADMINISTRATIVE	962		Permanent	
		02/08/2005	AF 2584	RECORD OF PERSONNEL SECURITY INVESTIGATION AND CLEARANCE	EXCEPTION			Temporary	
		06/23/2004	AF 1001	RECOMMENDATION FOR RECOGNITION	APPLICATION			Permanent	
		02/02/1984	SF 50	NOTIFICATION OF PERSONNEL ACTION	RECREATION OF RESUBMISSION OF A CPDF	005		Permanent	
		02/02/1984	SF 50	NOTIFICATION OF PERSONNEL ACTION	RECREATION OF RESUBMISSION OF A CPDF	005		Permanent	
		02/02/1984	SF 50	NOTIFICATION OF PERSONNEL ACTION	CORRECTION OF CURRENT CPDF FILE	007		Permanent	
		02/02/1984	SF 50	NOTIFICATION OF PERSONNEL ACTION	CORRECTION OF CURRENT CPDF FILE	007		Permanent	
		02/02/1984	SF 50	NOTIFICATION OF PERSONNEL ACTION	CAREER APPT	100		Permanent	
		02/02/1984	SF 50	NOTIFICATION OF PERSONNEL ACTION	CAREER APPT	100		Permanent	
		02/02/1984	SF 50	NOTIFICATION OF PERSONNEL ACTION	CAREER APPT	100		Permanent	
		02/02/1973	CSC 493	APPLICATION TO ESTABLISH ELIGIBILITY FOR CONVERSION TO CAREER-	APPOINTMENT SUPPORT			Temporary	

- From the **Reason** drop-down list select a reason for viewing this document. If you select **Other** as the reason you must type an additional description in the field to the right of the drop-down list.
- Select whether you want to include any public annotations from the **Annotation** option.
- Select the  **Action** icon next to the document you wish to view and Select the **View** option from the drop-down list. This will open the document using Adobe Acrobat reader in a new window.

The following figure displays a sample document.

Standard Form 52 Rev. 7/91 U.S. Office of Personnel Management FPM Supp. 296-33, Subch. 3		REQUEST FOR PERSONNEL ACTION	
PART A - Requesting Office (Also complete Part B, Items 1, 7-22, 32, 33, 36, and 39.)			
1. Actions Requested EOPF TEST1		2. Request Number EWP23093	
3. For Additional Information Call (Name and Telephone Number) EOPF TEST2		4. Proposed Effective Date 04/12/2002	
5. Action Requested By (Typed Name, Title, Signature, and Request Date) EOPF TEST 11/28/2000		6. Action Authorized by (Typed Name, Title, Signature, and Concurrence Date) EOPF TEST3	
PART B - For Preparation of SF 50 (Use only codes in FPM Supplement 292-1. Show all dates in month-day-year order.)			
1. Name (Last, First, Middle) Green, Beth		2. Social Security Number 111-11-1111	
		3. Date of Birth 03/12/1955	
		4. Effective Date 03/11/2000	
FIRST ACTION			
5-A. Code 702		5-B. Nature of Action Promotion	
5-C. Code N6M		5-D. Legal Authority Reg 335.102 Career Prom	
5-E. Code		5-F. Legal Authority	
SECOND ACTION			
6-A. Code 665		6-B. Nature of Action test	
6-C. Code		6-D. Legal Authority	
6-E. Code		6-F. Legal Authority	
7. FROM: Position Title and Number CONTRACT ADMINISTRATOR		15. TO: Position Title and Number CONTRACT ADMINISTRATOR	

- If the document contains multiple pages, use the **Next Page** and **Previous Page** buttons to navigate through the document.
- When you finish, click the  **Close** button to close the window.
- On the **Search Results** page, click the  **Cancel** button to return to the search window or select a new document to view.

Viewing eOPF Document Annotations

An annotation is a transparent layer of written comments placed on top of the document that may be used to highlight, markup or write comments. These layers can be public or private.

Documents in the eOPF can be viewed or printed in their original state, or with any annotations that have been added. Since annotations are added separately to each page of a document, you must navigate to each page to view the annotations for that page. To view document(s) with annotations:

- Search for and open the desired eOPF document.
- If this is not your own eOPF, from the drop-down Reason list, select a reason for viewing this document.

The "View documents with annotations" is selected by default at the top of the display.

- Open the document by clicking on the  **Action** icon next to the document you want to view.

The document appears in the viewer.

Standard Form 52 Rev. 7/91 U.S. Office of Personnel Management FPM Supp. 296-33, Subch. 3				REQUEST FOR PERSONNEL ACTION			
PART A - Requesting Office (Also complete Part B, Items 1, 7-22, 32, 33, 36, and 39.)							
1. Actions Requested EOPF TEST1						2. Request Number EWP23093	
3. For Additional Information Call (Name and Telephone Number) EOPF TEST2						4. Proposed Effective Date 04/12/2002	
5. Action Requested By (Typed Name, Title, Signature, and Request Date) EOPF TEST 11/28/2000				6. Action Authorized by (Typed Name, Title, Signature, and Concurrence Date) EOPF TEST3			
PART B - For Preparation of SF 50 (Use only codes in FPM Supplement 292-1. Show all dates in month-day-year order.)							
1. Name (Last, First, Middle) Green, Beth		2. Social Security Number 111-11-1111		3. Date of Birth 03/12/1955		4. Effective Date 03/11/2000	
FIRST ACTION				SECOND ACTION			
5-A. Code 702		5-B. Nature of Action Promotion		6-A. Code 665		6-B. Nature of Action test	
5-C. Code N6M		5-D. Legal Authority Reg 335.102 Career Prom		6-C. Code		6-D. Legal Authority	
5-E. Code		5-F. Legal Authority		6-E. Code		6-F. Legal Authority	
7. FROM: Position Title and Number CONTRACT ADMINISTRATOR				15. TO: Position Title and Number CONTRACT ADMINISTRATOR			

- Click on the **Next Page** and **Previous Page** buttons if there are 2 or more pages to view.

- Click the  **Close** button to close the viewer.

- On the Results List page, click the  **Cancel** button to return to the search window or select a new document to view.

Annotating an eOPF Document

eOPF has an annotation feature which allows specified HR staff to make notes on documents. These notes are preserved as a layer that sits on top of the original document. The document can then be viewed or printed with or without the annotations.

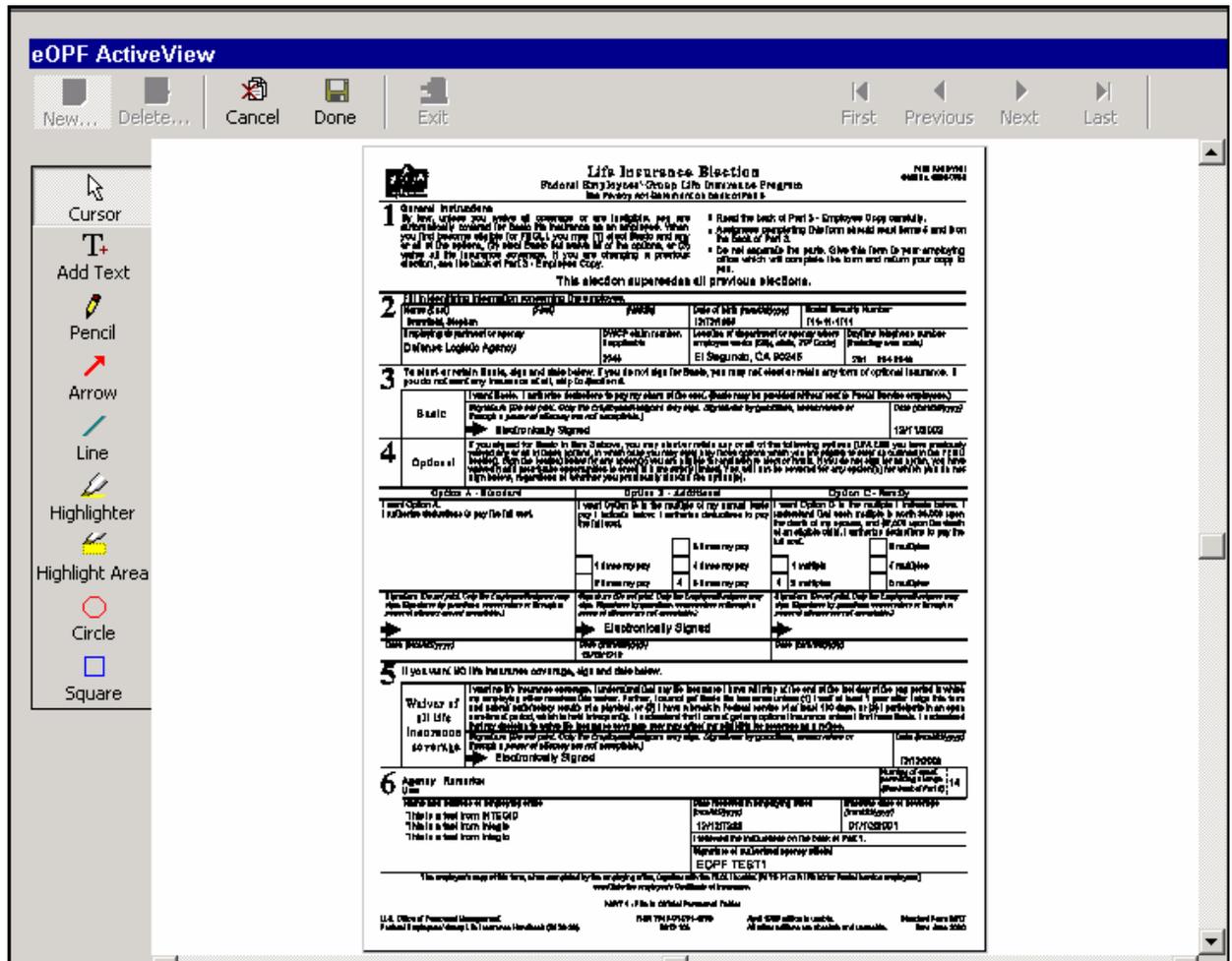
Annotations are added separately to each page of a document. eOPF annotations tools allow you to freehand draw, apply shapes, add text annotations, and use a highlighter.

NOTE: there are two classifications of an annotation: public and private. If you designate an annotation as public, it can be viewed, edited, and deleted by anyone with view access in eOPF. Private annotations can be viewed and/or edited only by the user and HR staff. eOPF does not allow anyone to annotate their own documents.

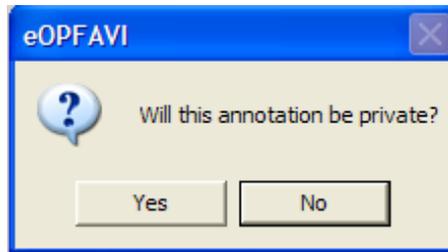
To annotate a page in an eOPF document:

1. Search for and open the desired eOPF document.
2. From the **Reason** drop-down list, select a reason for viewing the document.
3. Open by clicking on the  **Action** icon corresponding to the document you wish to annotate and select **Annotate** from the action option list.

The following figure displays the **ActiveView** page.



4. Click the **New** button.
The Private Annotation pop-up box appears.



5. Select the **Yes** or **No** button. The **ActiveView** page reappears.
6. Select the annotation type from the tool list:



7. On the page, use your mouse to add the desired annotation(s).
8. When finished adding annotations, click the **Done** button. If you are done using the annotation feature, click the **Exit** button to close the document view window.

For information on removing an Annotation from a Document, refer to the eOPF online HELP.

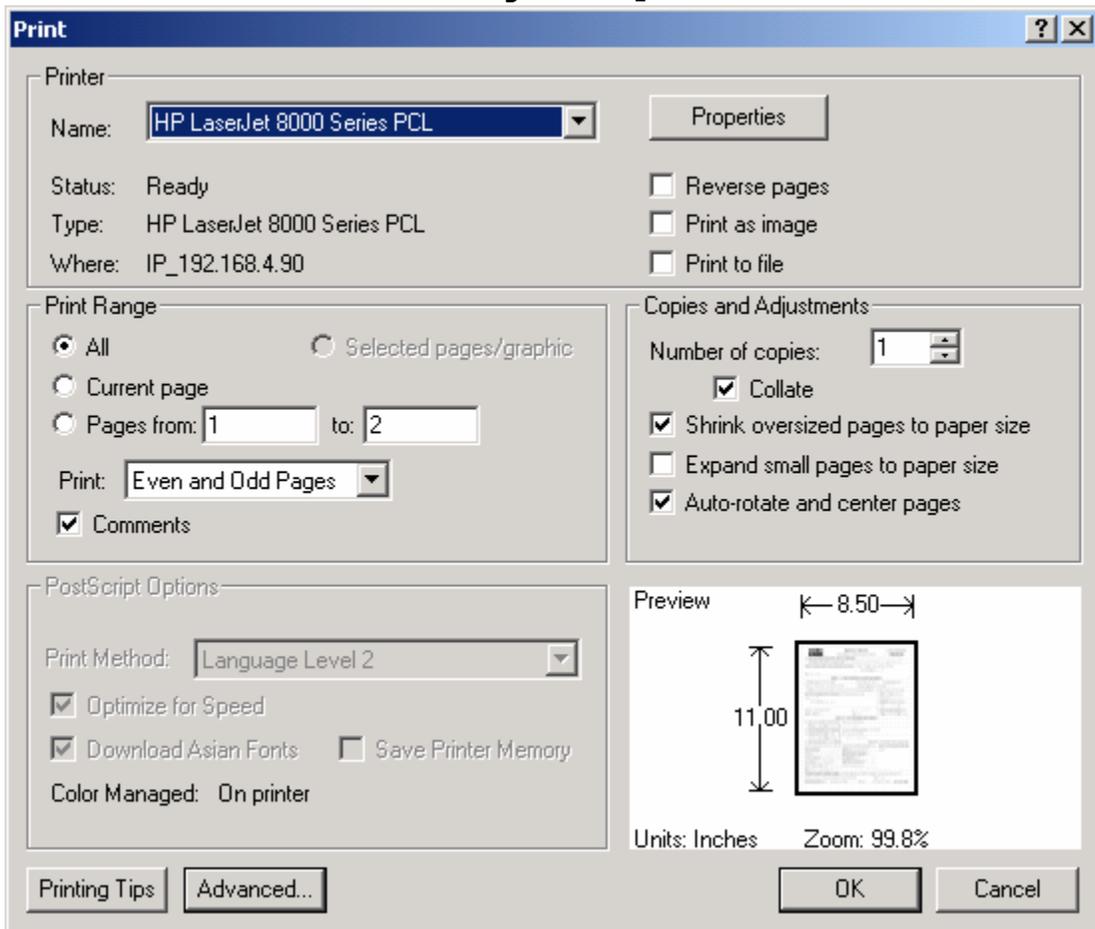
Chapter 4: Printing eOPF Documents

Although eOPF is designed as a paperless record, there may be times when a hard copy of an eOPF document is needed.

You may choose to print one or more of the eOPF documents. The **My eOPF** option allows you to print one document at a time from your own eOPF. The **Search eOPF** option allows you to print multiple documents from your own or an employee's eOPF.

Printing an eOPF Document using My eOPF:

1. From My eOPF, locate the document you want to print.
2. Open the document using the  **Action** icon and select the **View** option.
3. On the Document View window toolbar, Click the **Print** button. The **Print Dialog** box opens.



4. Modify your printer settings and click the **OK** button.
5. Click the **Close** button to close the document viewer.

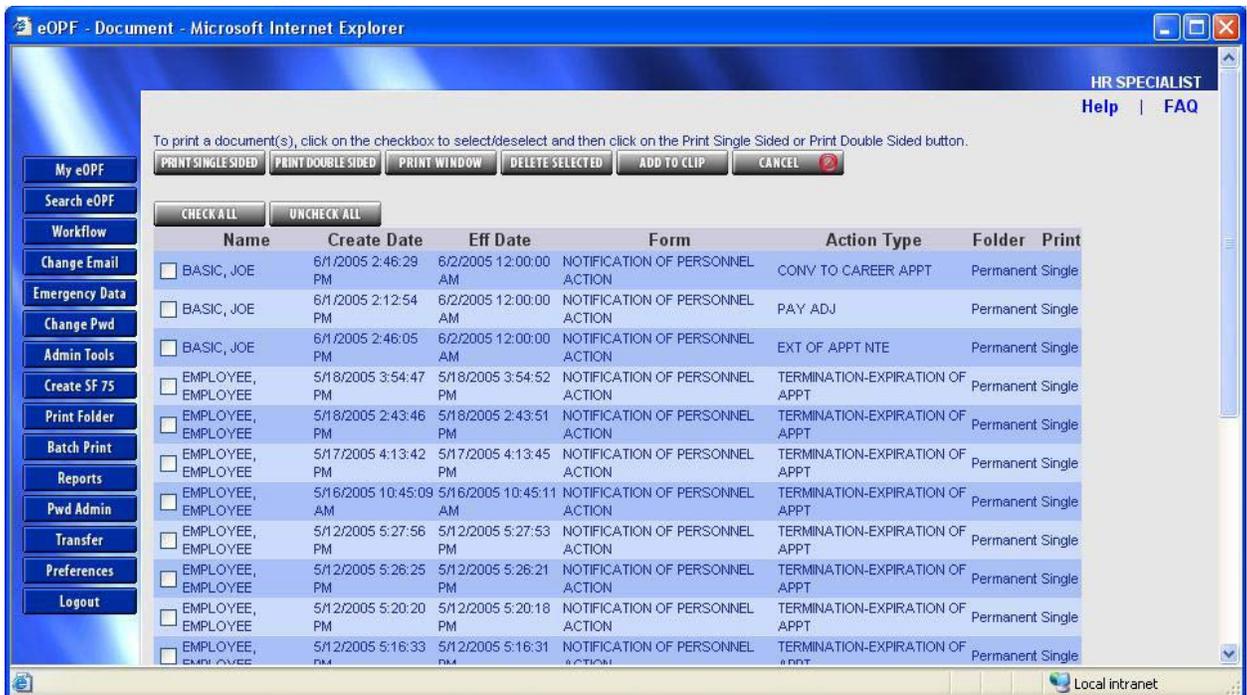
Printing eOPF Documents using Search eOPF

eOPF permits you to print documents based on a search query. You may print one or more documents directly from that list or you can print your results list.

Printing directly from a Search Results page:

1. Search for and open the desired eOPF document. The **Folder** page displays.
2. From the **Folder** page, click the **Show All Docs** button.

The **Show All Documents** page appears.



3. Click the check boxes of the documents you want to print, or click the **Check All** button to print them all. All selected documents are merged into one document displayed in the viewer.
4. Click the desired Print button (Double Sided or Single Sided).

5. If you want to print a copy of your Search Results page, click on the **Print Window** button from your **Show All Documents** page.

See your eOPF online HELP for more information on printing from eOPF, such as printing an entire OPF.

Chapter 5: Modifying Document Indexes

You modify a document index when you want to move a document to a different folder or folder section or correct information required for the index.

Correcting a Filing Error

This function is used to move a misfiled document to another folder.

To Correct a Filing Error:

1. Search for and locate the eOPF document you wish to move to a different folder using the **Search Folders** page. The **Search Results** page displays.

Help | FAQ

Reason: Annotation: View documents with annotations

SHOW ALL DOCS CANCEL

1 folder(s) returned.

Action	SSN	Last Name	First Name	Latest Eff. Date	PO ID	Org Code	Activity Code	Folder Status
	000-00-1000	LAST1000	FIRST1000	03/31/2005	TRB	AH	A	ACTIVE

115 document(s) returned for: LAST1000, FIRST1000

Prev 1 2 3 4 5 6 Next

Action	Side By Side	Effective Date	Form Number	Form Description	Type	NOA Code 1	NOA Code 2	Side	Excepci Comme
		02/17/2005	AF 1001	RECOMMENDATION FOR RECOGNITION	AWARDS/COMMENDATIONS			Deleted	
		02/17/2005	AF 1001	RECOMMENDATION FOR RECOGNITION	APPLICATION			Deleted	
		02/17/2005	AAA	AAA	ADMINISTRATIVE	962		Temporary	
		02/17/2005	AF 1001	RECOMMENDATION FOR RECOGNITION	APPLICATION			Deleted	
		02/17/2005	AAA	AAA	ADMINISTRATIVE	962		Permanent	
		02/08/2005	AF 2584	RECORD OF PERSONNEL SECURITY INVESTIGATION AND CLEARANCE	EXCEPTION			Temporary	
		07/02/2004	SF 75	REQUEST FOR PRELIMINARY EMPLOYMENT DATA	APPOINTMENT SUPPORT			Deleted	
		06/23/2004	AF 1001	RECOMMENDATION FOR RECOGNITION	APPLICATION			Permanent	
		02/02/1984	SF 50	NOTIFICATION OF PERSONNEL ACTION	RECREATION OF RESUBMISSION OF A CPDF	005		Permanent	
		02/02/1984	SF 50	NOTIFICATION OF PERSONNEL ACTION	RECREATION OF RESUBMISSION OF A CPDF	005		Permanent	
		02/02/1984	SF 50	NOTIFICATION OF PERSONNEL ACTION	CORRECTION OF CURRENT CPDF FILE	007		Deleted	
		02/02/1984	SF 50	NOTIFICATION OF PERSONNEL ACTION	CAREER APPT	100		Permanent	
		02/02/1984	SF 50	NOTIFICATION OF PERSONNEL ACTION	CAREER APPT	100		Permanent	

2. From the **Search Results** page, select a reason from the Reason drop-down list.

3. Move a document by clicking on the Action icon corresponding to the document you wish to move, and select the **Modify Index** option.

The **Modify Document Index** page appears.

eOPF - Edit Document Index Data - Microsoft Internet Explorer

My eOPF
 Search eOPF
 Workflow
 Change Email
 Emergency Data
 Change Pwd
 App Admin
 User Admin
 System Admin
 Create SF 75
 Print Folder
 Batch Print
 Reports
 Pwd Admin
 Transfer
 Preferences
 Logout

Original Values:

Name:	JOE, BASIC
SSN:	999-88-7777
Eff. Date:	2/4/2005
Form:	NOTIFICATION OF PERSONNEL ACTION
Type:	CANCELLATION
NOA Code 1:	001
NOA Code 2:	
Exception Comment:	Other/this is a test of other exception
Folder Side:	Permanent

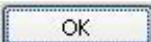
Enter New Data: Show all Forms/Types (including Obsolete)

SSN:	999-88-7777
Eff. Date:	2/4/2005
Form:	SF 50:::NOTIFICATION OF PERSONNEL ACTION
Type:	CANCELLATION
NOA Code 1:	001
NOA Code 2:	
Exception Comment:	Other
Folder Side:	Permanent

SAVE CANCEL

4. Type the correct employee's SSN in the SSN field, and then click the  **Save** button. The **Move Document** confirmation box appears.



5. Click the  **OK** button. The **Search Results** page reappears with the document moved to the correct folder.

For more information on **Modifying Document Indexes**, refer to the eOPF online HELP.

Chapter 6: Working with eOPF Folders

Employee OPF documents can be accessed from a Results List and Show All Documents pages or through the use of paper clips.

Working with Search Results Pages

When you elect to show all documents after performing a search, you see a list of documents matching your search criteria. A column in the results list indicates if the original document was single sided or double sided. You can print your search results list or print a document(s) from the list. See Lesson 4 of this guide for more information on printing eOPF documents. Additional information is available from Chapter 6 of the Online User Guide.

Working with Paper Clips in eOPF

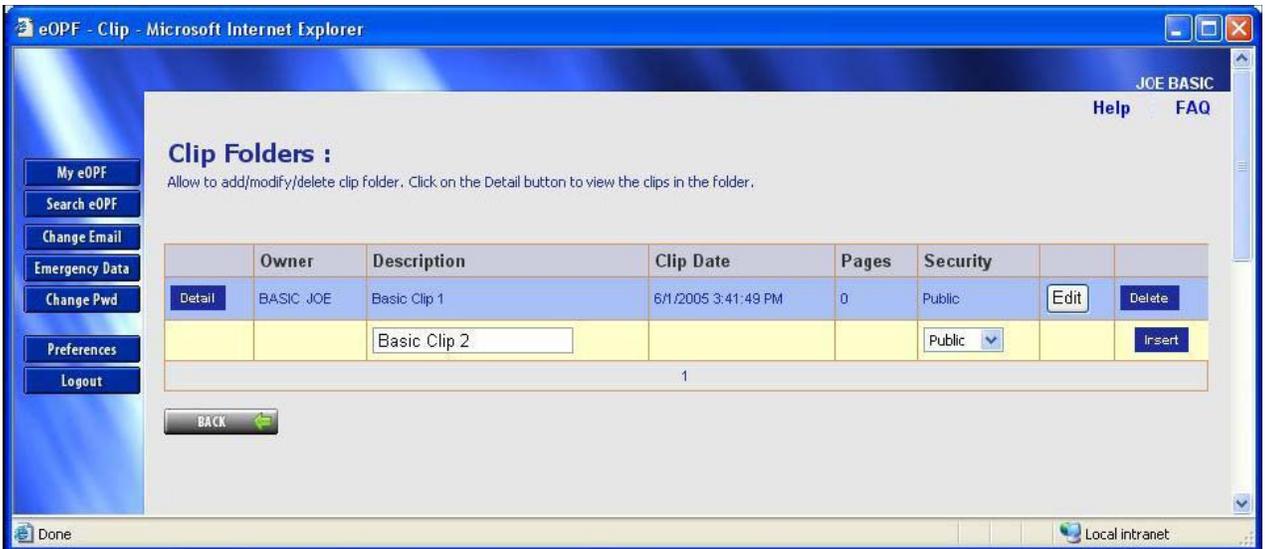
eOPF provides the ability to paper clip documents from the same folder together. eOPF paper clipping allows an employee or an HR Specialist to select individual pages within a document or entire documents for clipping.

A paper clip can be classified as **public** or **private**, with the system defaulting to public. Any user accessing the selected folder can view a public paper clip. ONLY the user that created the paper clip, a system administrator, or an HR Specialist can view a private clip.

Creating a Paper Clip

The first step in using the paper clip is creating a new paper clip for a folder:

1. Perform a search for the desired folder(s) using the **Search Folders** page. The **Search Results** page displays.
2. Click the Folder Action icon and select the  **Clip Folder** **Clip Folder** icon for the desired folder. The **Clip Folders** page opens.

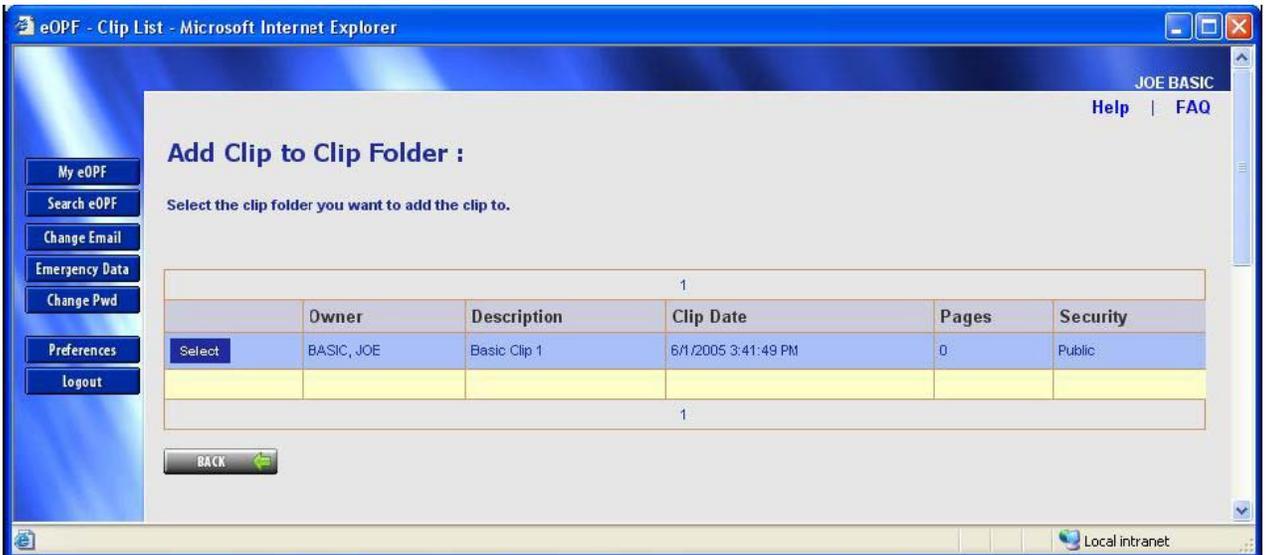


3. Enter a description for the paper clip in the **Description** field, such as FEHB documents or retirement documents.
4. In the **Security** field, select either **Public** or **Private** based on your needs.
5. Click the  **Insert** button.
6. Click the  **BACK** button to return to the search result list.

Once a folder has a **Clip Folder**, documents can be added to the Clip Folder at any time.

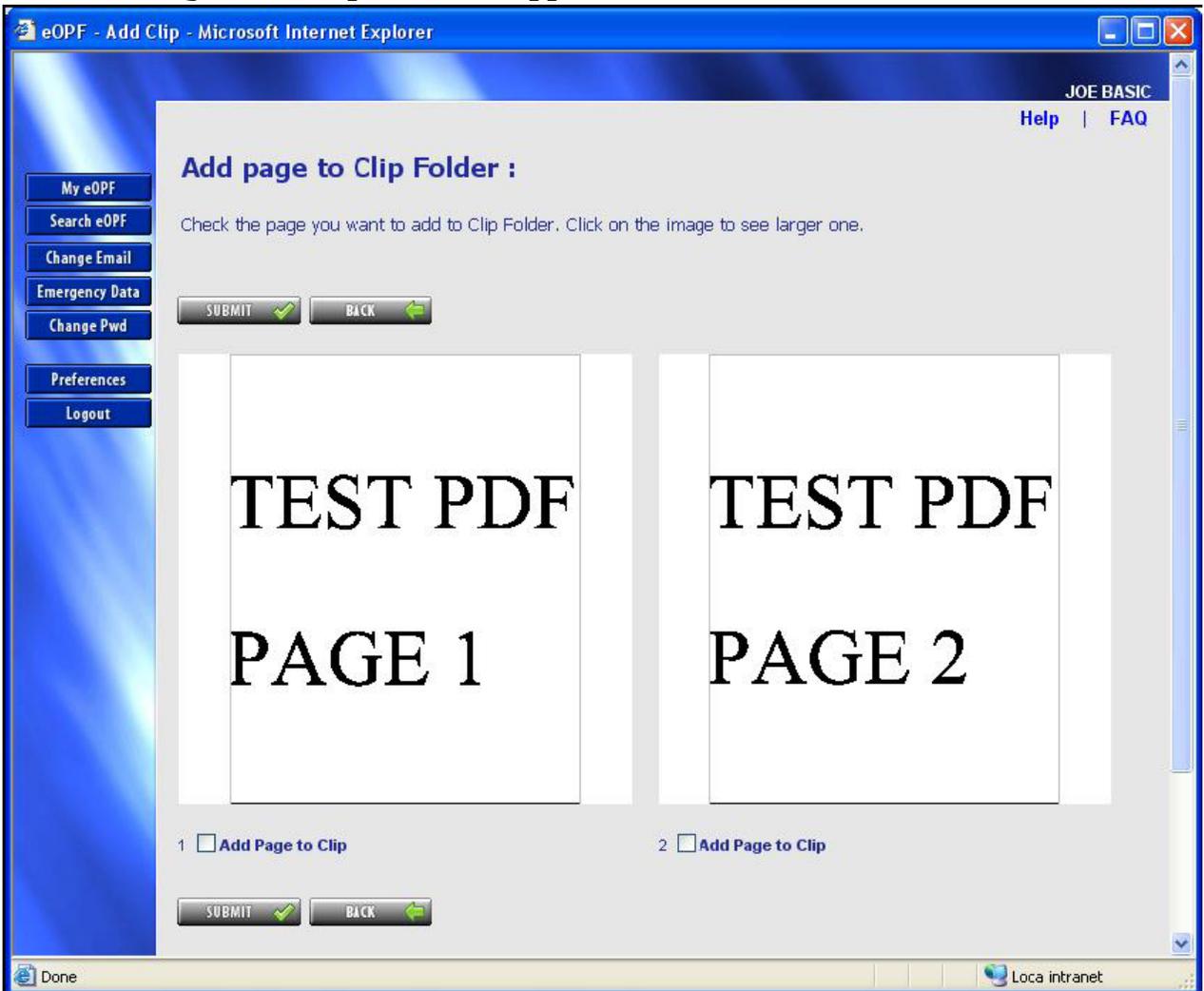
To Add Documents to a Clip Folder:

1. Search for the document within the folder you wish to paper clip. The **Search Results** page displays.
2. If this is not your own folder, you must select the reason for accessing a document from the **Reason** drop-down list.
3. On the Results List page, click the appropriate  **Add to Clip** **Add to Clip** icon to add a document to the clip. The **Add Clip to Clip Folder** page appears.
4. Click the  **Select** **Select** button to add the clip to the clip folder. The **Add Page to Clip Folder** page appears.



5. Click the  Select button to add the clip to the clip folder.

The Add Page to Clip Folder appears.



6. **Select** the additional pages you want to add to the clip by checking the **Add Page to Clip** checkbox under each page you want in the Clip Folder, and then click the  **Submit** button. The Search Results page reappears.

NOTE: Click the **Back** button to return to the previous page.

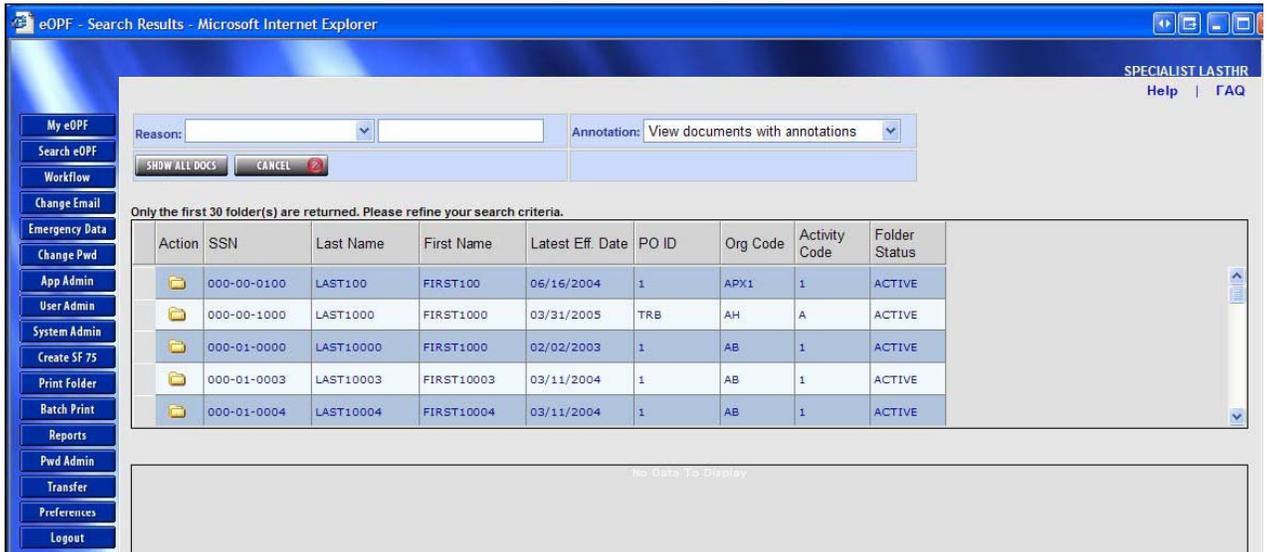
HINT: you can easily add multiple documents to a clip folder from the **Show All Docs** screen.

Viewing documents within a Paper Clip

Once a paper clip has been created and populated with associated documents, you can view a list of the documents and open the documents.

To View Documents Contained within a Paper Clip:

1. Search for the desired folder(s) using the **Search Folders** page. The **Search Results** page displays.



eOPF - Search Results - Microsoft Internet Explorer

SPECIALIST LASTHR
Help | FAQ

Reasons: Annotation: View documents with annotations

SHOW ALL DOCS CANCEL

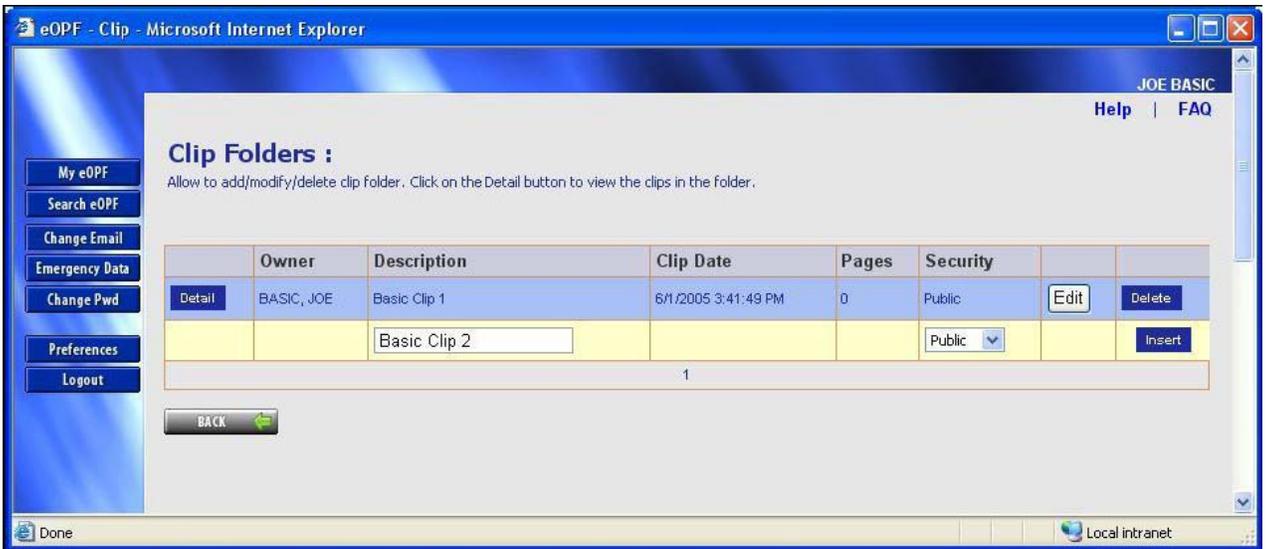
Only the first 30 folder(s) are returned. Please refine your search criteria.

Action	SSN	Last Name	First Name	Latest Eff. Date	PO ID	Org Code	Activity Code	Folder Status
	000-00-0100	LAST100	FIRST100	06/16/2004	1	APX1	1	ACTIVE
	000-00-1000	LAST1000	FIRST1000	03/31/2005	TRB	AH	A	ACTIVE
	000-01-0000	LAST10000	FIRST1000	02/02/2003	1	AB	1	ACTIVE
	000-01-0003	LAST10003	FIRST10003	03/11/2004	1	AB	1	ACTIVE
	000-01-0004	LAST10004	FIRST10004	03/11/2004	1	AB	1	ACTIVE

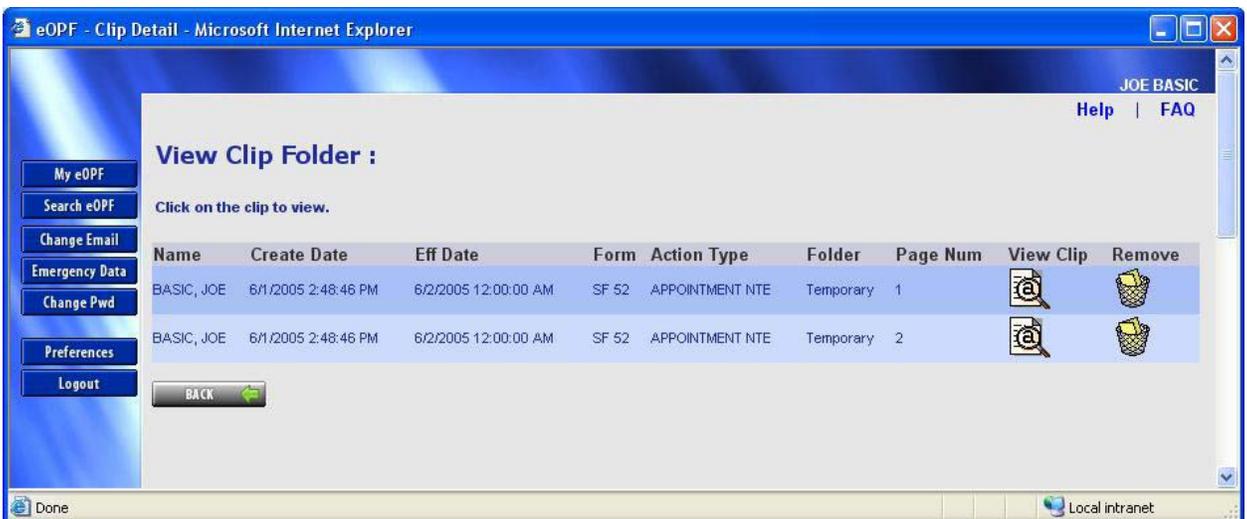
No Data To Display

2. From the **Search Results** page, select the reason for accessing the document from the **Reason** drop-down list.

3. Click on the  **Folder Action** icon and select the  **Clip Folder** icon to show the **Clip Folder** page for this Folder.



4. Click the **Detail** button next to the desired paper clip. The **View Clip Folder** page appears.



5. Click the **View Clip** icon to view the desired document within the clip. The document appears.

Refer to the eOPF online HELP for more information on eOPF paper clips, including how to remove documents from a paper clip.

Chapter 7: Adding Documents

eOPF provides the ability to manually add new documents into the system by either scanning paper documents or importing other electronic files into the database.

Scanning Documents into eOPF

Users can add new documents into the system via scanning. Before paper documents are scanned, there are some preparation steps that must be performed.

Preparing Documents

- All staples or other metal fasteners must be removed
- Odd-sized documents and poor quality original documents should be either photocopied or reduced
- Any folds or irregularities should be straightened

Scanning document(s)

Directions for single-sided and double-sided documents vary slightly, so be sure to refer to the correct set of instructions in your User Guide, pages 60-64. In this lesson, we will cover single-sided scanning.

1. Search for the folder where the new document belongs using the eOPF **Search Folders** page. From the **Search Results** page, select the **Reason** from the drop-down list for working on the selected folder.
2. Click the  **Folder Action** icon button and select the  **Add Doc** option to add a new document.
3. Place the document in the scanner (our scanners have both a flatbed and a feeder. For one-sided scanning, place your document face down on either. For double-sided documents, use the feeder only.)
4. After the scanning interface opens, click **Scan**.
5. Select the following options:
 - Verify ISIS checkbox is unchecked
 - Show Scanner Interface - keep unchecked
 - Form Feeder Multiple Pages - check if doing duplex or using the form feeder and then click on the .

button. Select the appropriate scanner from the **Source** dialog box and click the **Select** button. The document appears. If the document is upside-down, right click and choose option to rotate, etc. Document can be magnified at this point and can also be annotated.

6. Click the  **Save** button. The **Document Info** dialog box appears. The SSN field will already contain the SSN of the selected folder. The first and last name fields will also pre-fill.
7. From the **Form** drop-down list, select the appropriate **Form Name**.
8. From the **Type** drop-down list, select the appropriate **Form Type**.
9. In the Folder area, select the checkbox representing the folder section (Left Side, Right Side) in which the document will reside. eOPF defaults to the folder notes in the forms index.
10. In the **Effective Date** field, select the appropriate effective date of the document from the calendar.
11. Click the  **Save** button. The scanning application closes and returns you to eOPF.
12. Verify the information is accurate, and then click **Yes**. A confirmation box appears.
13. Click the  **OK** button, then click **Close**. A confirmation box appears.
14. Click **Yes**.

For information on scanning double-sided documents and other scanning functions, refer to pages 57-64 in your User Guide.

Importing Electronic Documents Into eOPF

eOPF has the capability to import electronic files. Documents in electronic format (image, Word, PDF) can be added to an eOPF folder.

To Import an eOPF Document:

1. Search for the employee eOPF for the new document.
2. Select a Reason for viewing the document.
3. Click on the  **Folder Action** icon and select the  **Add Doc** icon to add a new document to this folder.
4. Click the  **Open** button

5. Select the desired file and click the  **Open** button. The selected file appears.
6. Click the  **Save** button. The **Document Info** dialog box appears. The first name, last name, and SSN will be pre-filled based on the SSN of the selected folder.
7. Enter the appropriate information:
 - Form the **Form** drop-down list.
 - From the **Type** drop-down list.
 - Select the **Folder** side the document will reside.
 - Complete the **Effective Date** field.
8. Click the  **Save** button.
9. Verify the information is accurate, then click **Yes**. A confirmation box appears.
10. Click the  **OK** button.
11. Click the  **Close** button.
12. Click **Yes**.

Sometime you may need to add a missing page to an electronic document.

To Import a New Page Into an Existing eOPF Document:

1. Retrieve and open the desired eOPF document.
2. Select a Reason code for viewing the document.
3. Modify a document by clicking on the  **Action** icon corresponding to the document you want to modify and select the  **Modify** icon. NOTE: the only modification of the document being done is the addition of new pages.
4. Click the **Import** button. A confirmation pop-up box appears.
5. Click **Yes**. The **Page Import** dialog box appears.
6. Select the desired document, and then click the  **OK** button. A confirmation box displays - "**New Page was successfully imported.**"
7. Click the  **Close** button. A **Close Document** confirmation box appears.

For additional information on importing electronic documents in eOPF see the online HELP.

Chapter 8: Working with eOPF Reports

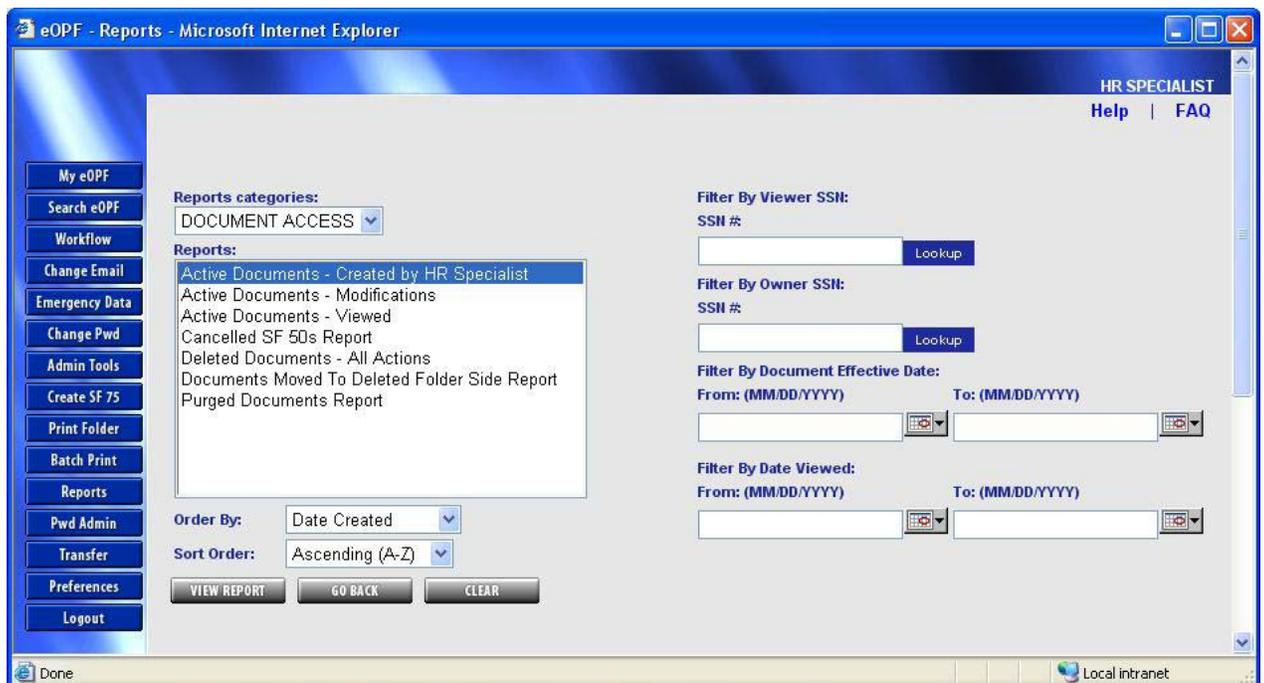
The eOPF system allows HR specialists and eOPF administrators to view, print, and export standardized reports. The reports are real time data analysis of eOPF users, records, and system usage. The eOPF system administrator will create and define the various reports HR specialists can access.

There are three major report groups: Document Access, System Access, and System Integrity. Document Access reports list types of actions taken on eOPF documents, by who, and when. System Access reports detail system access. System Integrity reports verify data integrity if there is a system or hardware failure or some system threat. Requests for any additional reports will go through our eOPF system administrator.

Viewing and Printing Logs and Reports

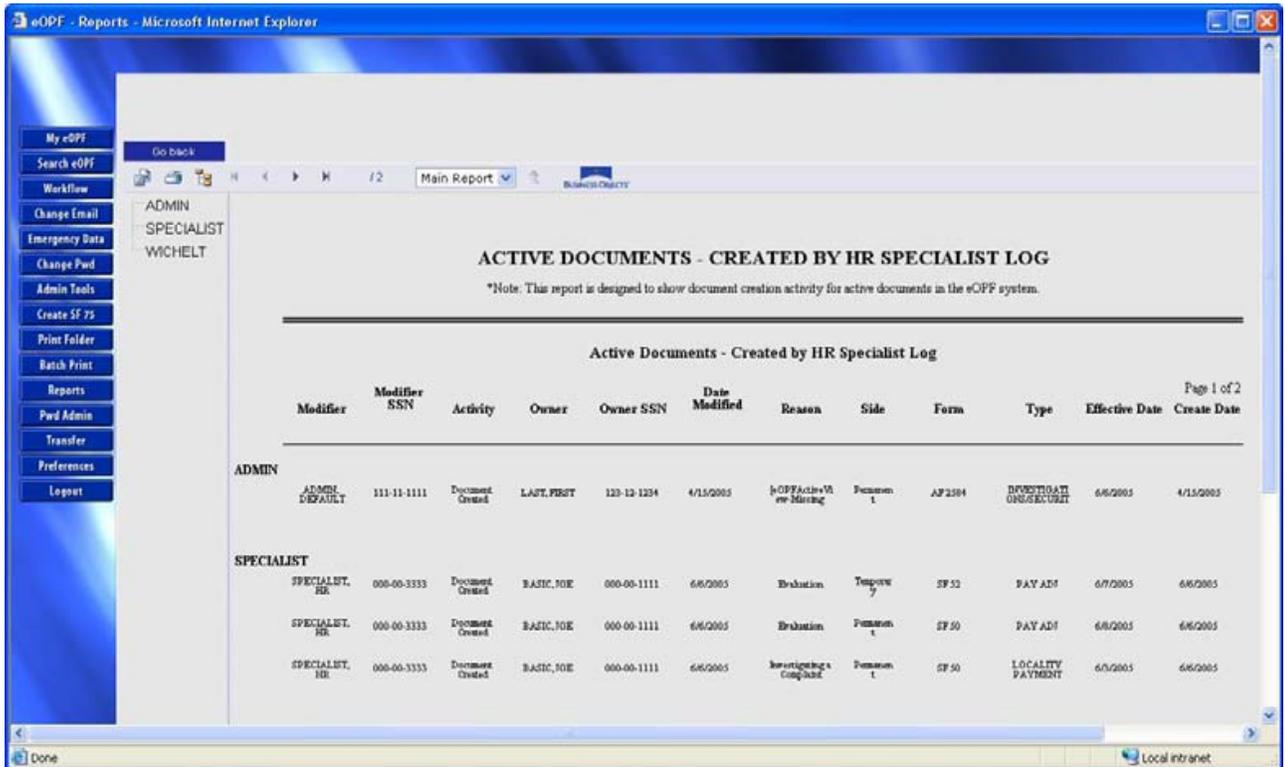
HR Specialists may view and print reports on demand. The procedure is the same for viewing all of the reports.

1. Click the  **Reports** button. The Reports page appears.



2. Select a Report Category, the desired Report, and input Report filters.

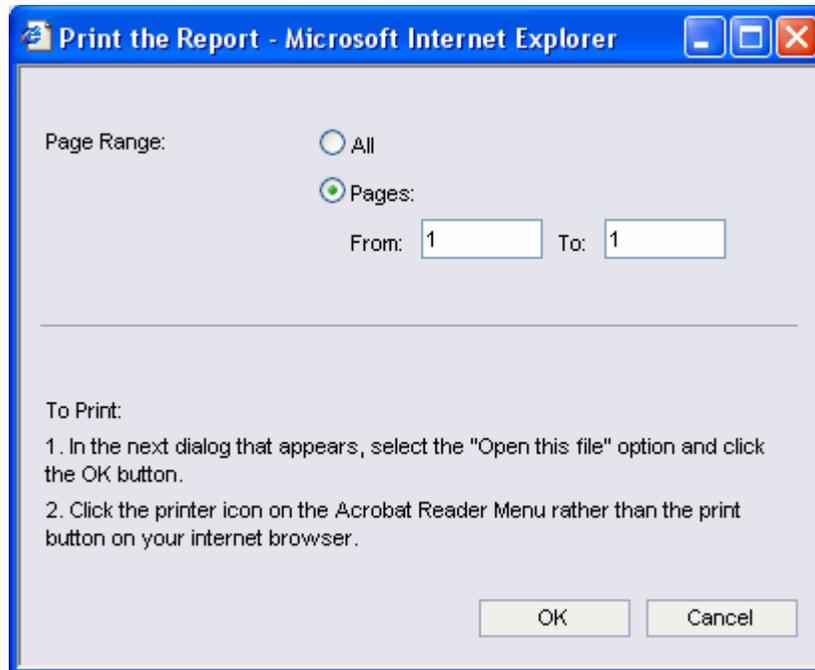
3. Click the  View Report button. The Report appears.

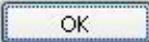


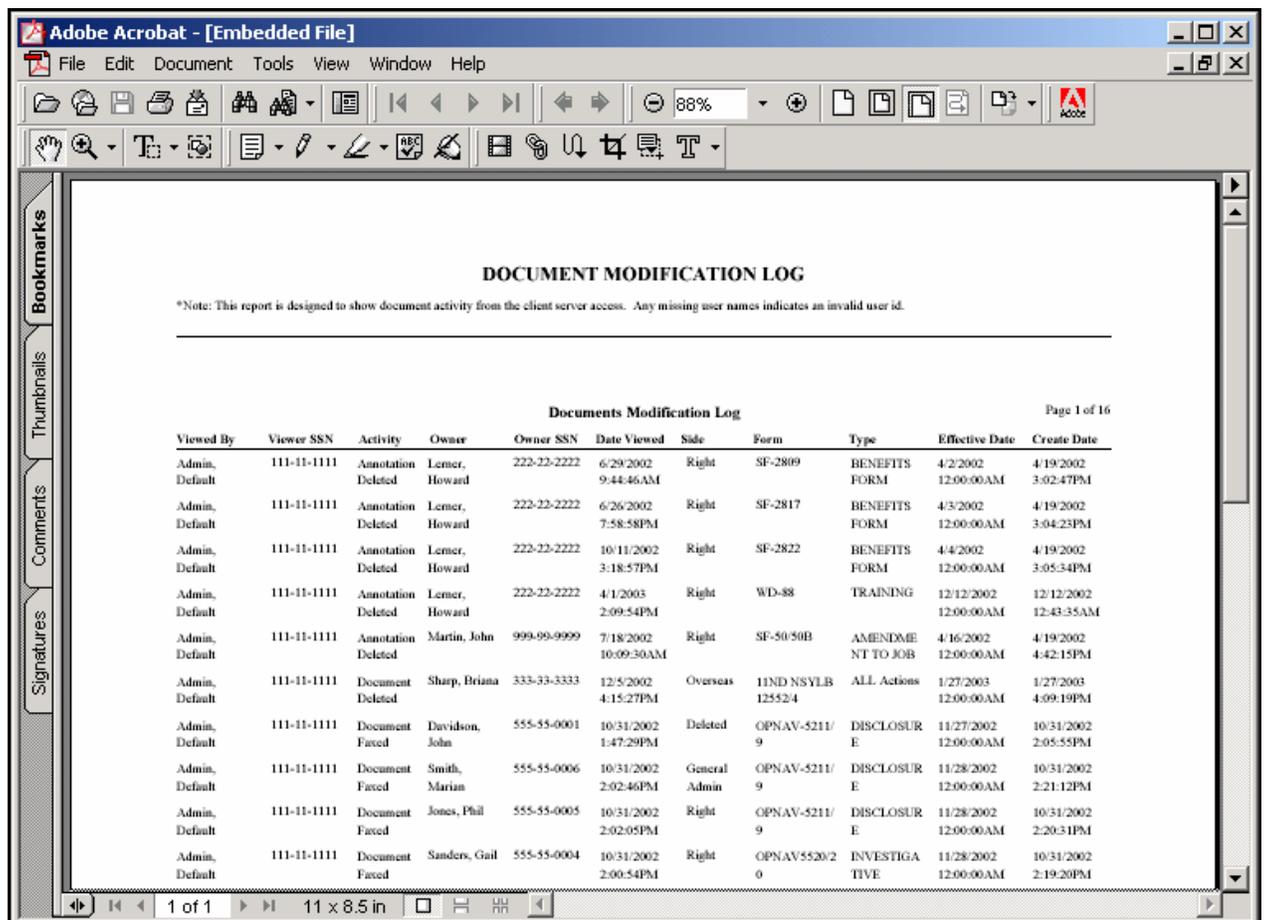
The screenshot shows a web browser window titled "eOPF - Reports - Microsoft Internet Explorer". The interface includes a left-hand navigation menu with options like "My eOPF", "Search eOPF", "Workflow", "Change Email", "Emergency Data", "Change Pwd", "Admin Tools", "Create SF 75", "Print Folder", "Batch Print", "Reports", "Pwd Admin", "Transfer", "Preferences", and "Logout". The main content area displays a report titled "ACTIVE DOCUMENTS - CREATED BY HR SPECIALIST LOG". A note states: "*Note: This report is designed to show document creation activity for active documents in the eOPF system." The report is presented as a table with columns: Modifier, Modifier SSN, Activity, Owner, Owner SSN, Date Modified, Reason, Side, Form, Type, Effective Date, and Create Date. The table is divided into two sections: "ADMIN" and "SPECIALIST".

Modifier	Modifier SSN	Activity	Owner	Owner SSN	Date Modified	Reason	Side	Form	Type	Effective Date	Create Date
ADMIN											
ADMIN DEFAULT	111-11-1111	Document Created	LAST, FIRST	123-12-1234	4/15/2005	IsOPFActive/VA re Missing	Person t	AF 2504	INVESTIGATI ON/SECURITY	6/6/2005	4/15/2005
SPECIALIST											
SPECIALIST, HR	000-00-3333	Document Created	BASIC, JOE	000-00-1111	6/6/2005	Evolution	Tempor y	SF 52	PAY ADJ	6/7/2005	6/6/2005
SPECIALIST, HR	000-00-3333	Document Created	BASIC, JOE	000-00-1111	6/6/2005	Evolution	Person t	SF 50	PAY ADJ	6/6/2005	6/6/2005
SPECIALIST, HR	000-00-3333	Document Created	BASIC, JOE	000-00-1111	6/6/2005	Investigative Complaint	Person t	SF 50	LOCALITY PAYMENT	6/5/2005	6/6/2005

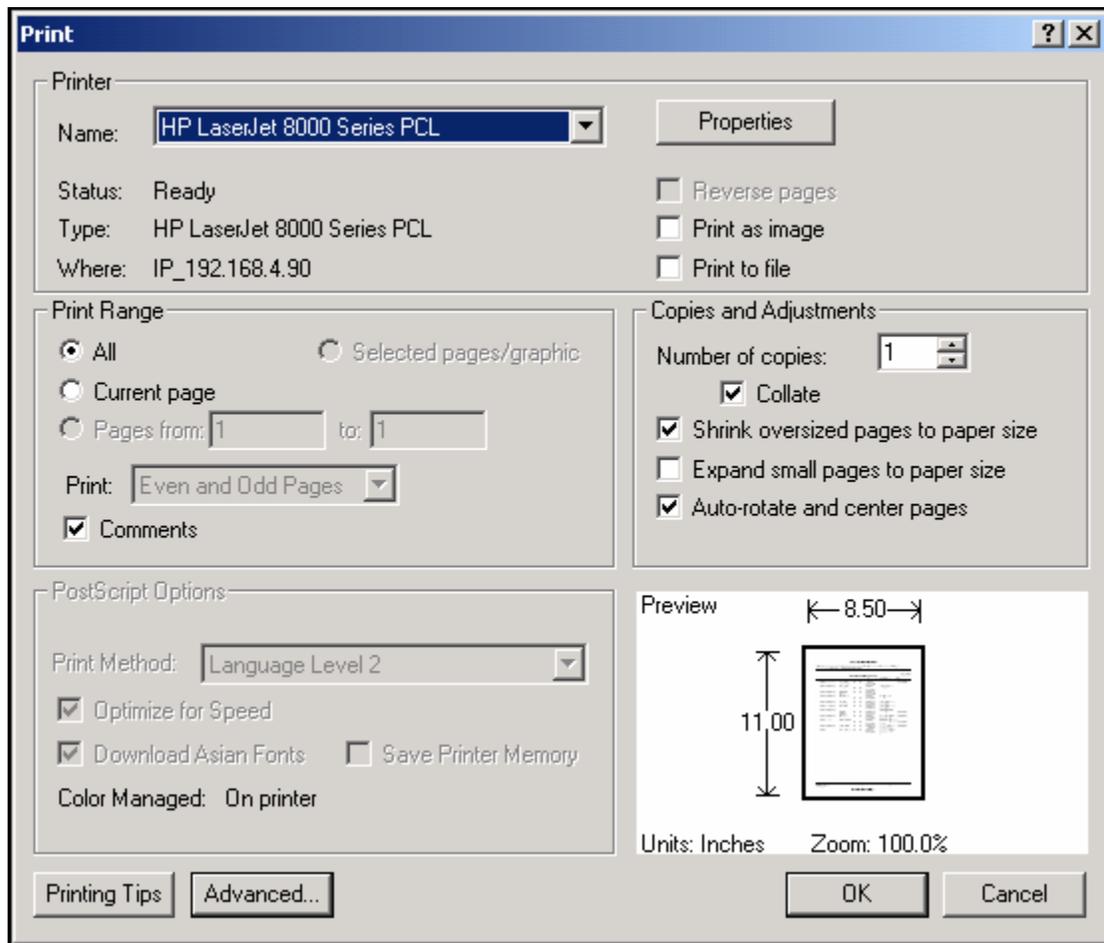
4. Click the  Print button. The Print Report page appears.

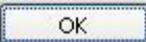


5. Select **All** or a group of pages to print, and click the  OK button. The report appears as a PDF document.



6. Click the  Print button. The **Print** setting box appears.



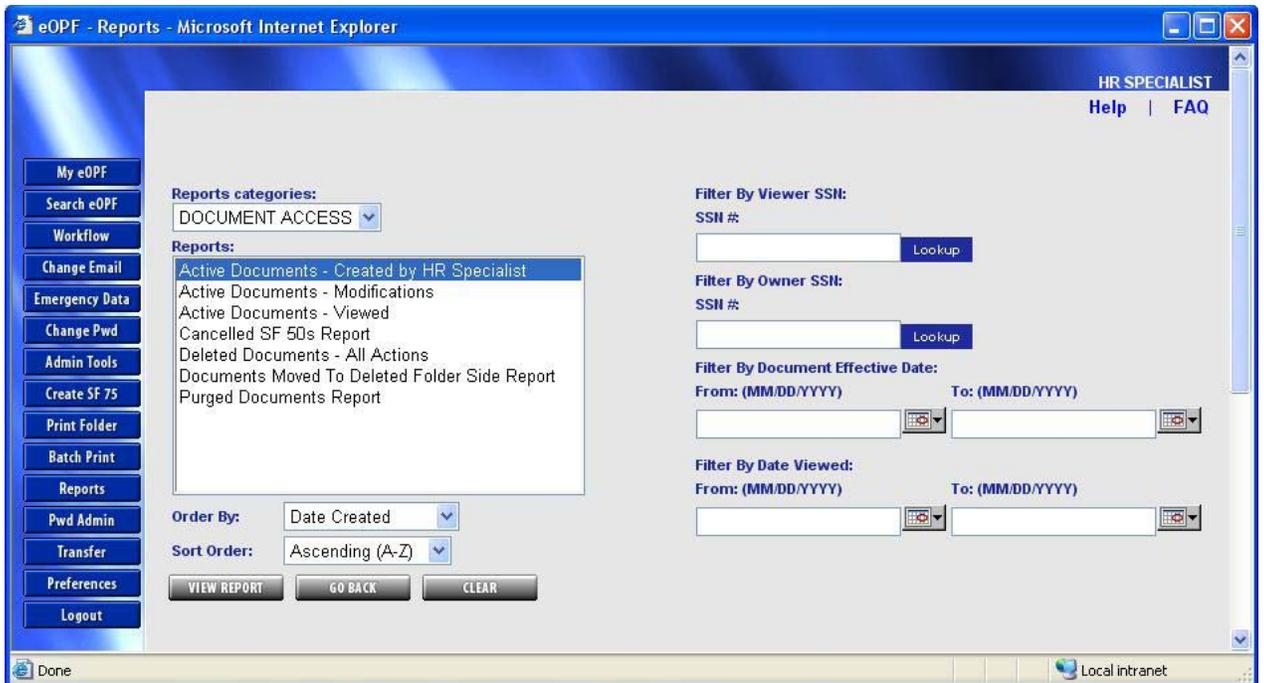
7. Select the desired print parameters; click the  OK button.

Exporting Logs and Reports

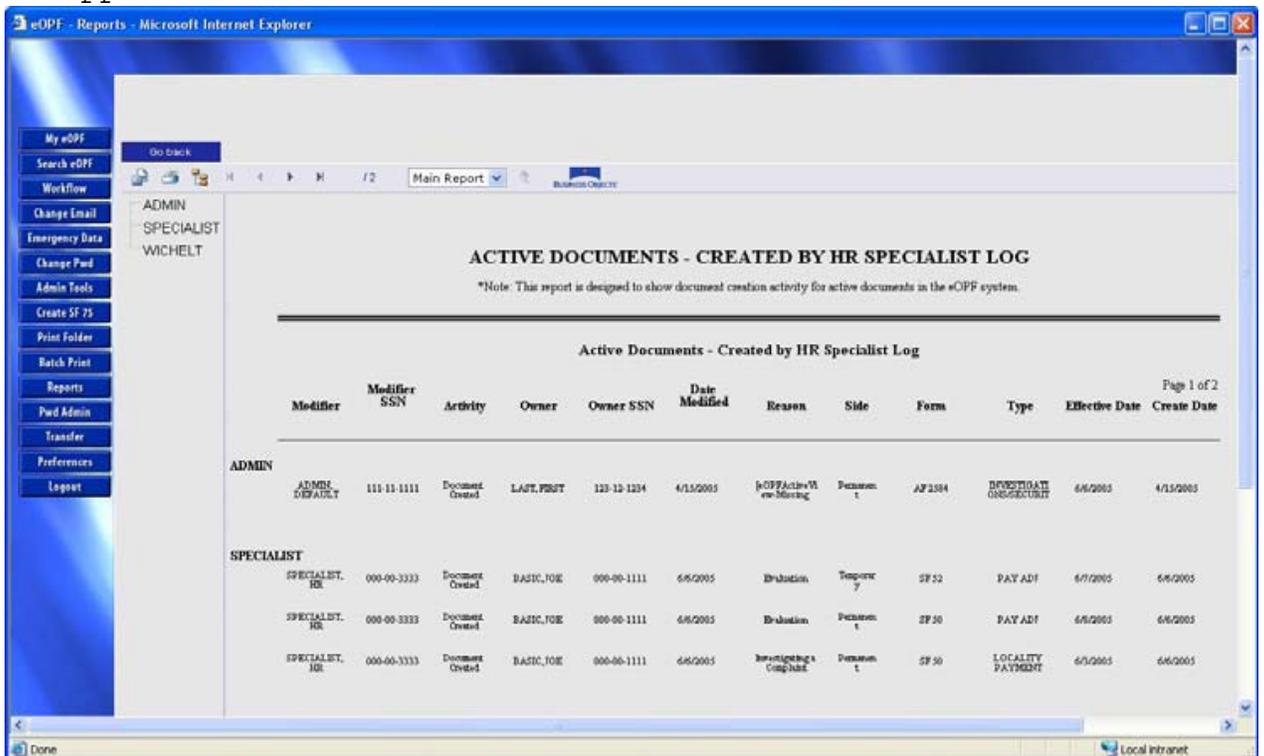
The eOPF system allows HR users and eOPF administrators to export the logs and reports. The same procedure is used for all of the reports.

To export logs and reports:

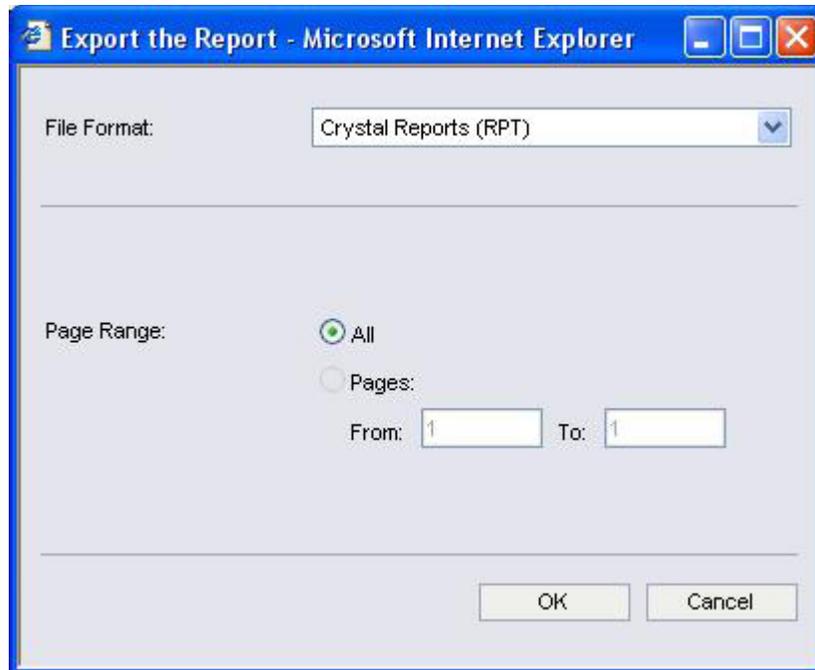
1. Click the  **Reports** button located on the left-side menu. The **Reports** page appears.



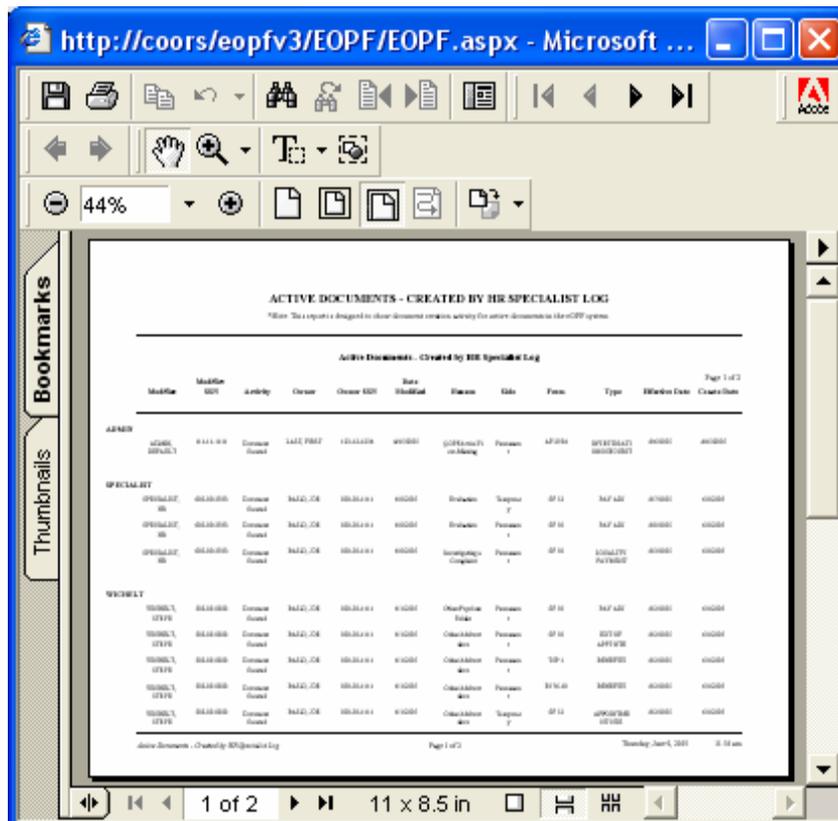
2. Select the **Report Category**, the desired **Report**, and enter report filters.
3. Click the  **View Report** button. The **Report** appears.



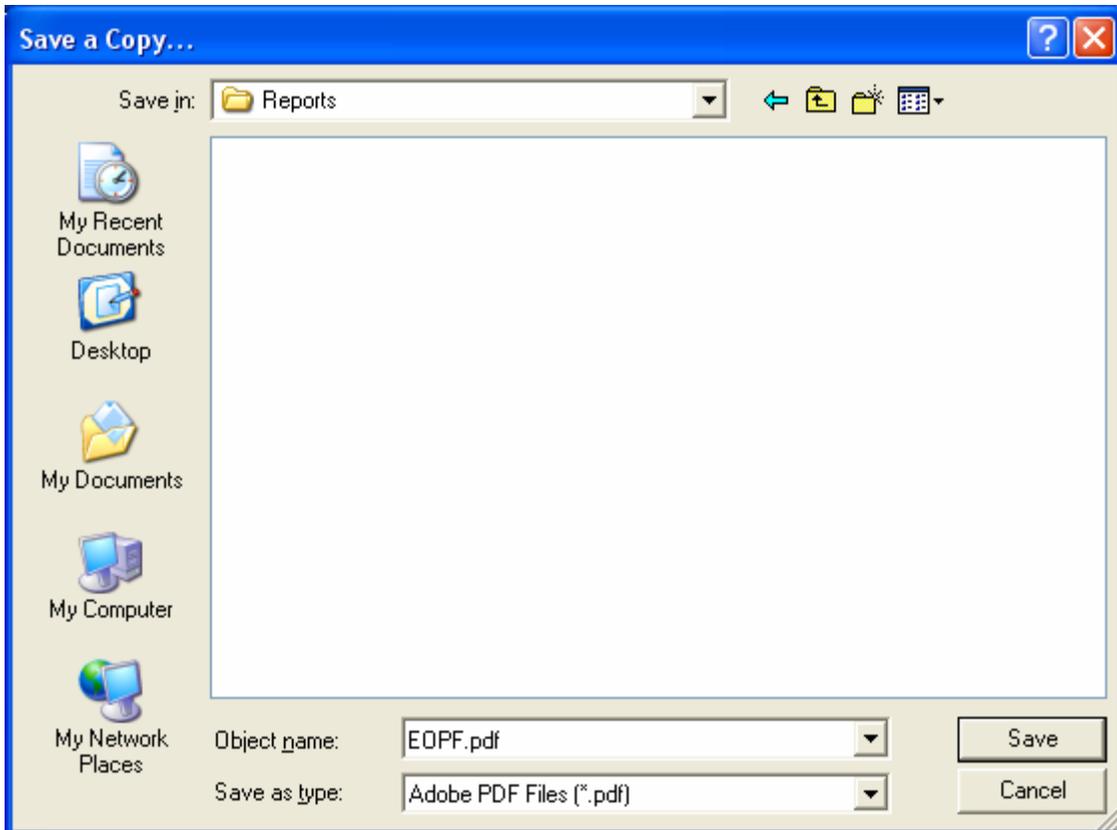
4. Click the  **Export** button displayed on the report. The **Export Report** page appears.

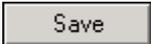


5. Select the report format, and click the OK button. The **Report** appears in the selected format.



6. Select **File**→**Save As**. The **Save As** pop-up box appears.



7. Type the desired document **Name**, and then click the  **Save** button.