



Quick Reference Guide For Workforce Management Staff

How to Login to eOPF

Note: The Adobe Reader “options” should be set to “not” view inside the browser. This option can be accessed by selecting Edit → Preferences → Internet in Adobe Reader v6.x version.

1. The eOPF User Agreement page will display
2. Read and click *Accept* to the User Agreement
3. Type your *User ID* and *Password* in the field
4. Your Server and Agency Name should appear by default
5. Click the *Submit* button
6. The *eOPF Welcome* page opens
7. The first time you login follow the prompts to change your Password. Your password must be 8 characters including at least one upper-case letter, one lower-case letter, one number and one special character. ALSO, the first time you login follow the prompts to **enter your email address.**

Viewing the Full Screen

1. Expand your window to view Full Screen by clicking on the “maximize” button in the top-right corner of the eOPF window

Viewing your eOPF Document

Click **My eOPF** on the eOPF main menu and expand your folder by clicking on the plus (+) icon.

1. From the *Results List* page, search for the eOPF document you would like to view.
2. From the *Annotation* drop-down list located

at the top of the screen, select whether you wish to view the document with or without annotations.

3. Click the View Document icon located on the row of the document you want to view
4. If the document contains multiple pages, use the **Next Page** and **Previous Page** buttons located in the document viewer to navigate through the document as necessary.
5. When you finish, click the *Close* button in the upper right corner of the document viewer window.

Searching for an eOPF

1. Click the *Search eOPF* button from the main menu on the eOPF application to query by fields such as SSN, Last Name, Activity Code, and Organization Code.
2. Enter your choice of field to search on, such as SSN, Form/Type, Last Name, First Name, NOA Code, Create Date, etc.
3. Once you enter the data into the search fields you want to use, click the *Search* button. The *Folder* page appears.
4. Click on the *Plus* [+] icon to the left of the last name of the employee folder you want to see. The *Result List* displays.

OR-

Click the *Show All Docs* button to list all documents that meet the particular search criteria.

Note: **Max Folders to View** can be changed to reduce or increase the list of folders found that met all search criteria. If you have 19 folders that meet the search criteria, but the Max Folders to View is set to 5, then only the first five folders are accessible.

Searching for Folders by Name

1. On the search folders page enter all or part of the last name and/or first name fields and click the *Name Search* button.
2. Select the Name of the employee by clicking the corresponding radio button, then click

the *Select* button.

3. To view the contents of an eOPF, click the *Plus* icon to the left of the Last Name column to expand the folder contents.

Note: (see “Viewing Your eOPF Document” above) Location for that state in next drop-down menu. If location does not exist select **Unlisted**.

Annotating an eOPF Document

1. Search for and open the desired eOPF document.
 2. 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.
 3. Click the **Annotate Doc** icon.
 4. Click the **New** button.
 5. Select the **Yes** button if you want the Annotation to be private.
 6. Select the annotation type of your choice from the tool list.
 7. On the page, use your mouse to add the desired annotation(s).
 8. If you wish to add additional annotations with another tool, repeat the previous 2 steps with the new annotation tool.
 9. When you finish adding annotations, click the **Done** button.
 10. If you would like to add additional annotations to other pages, navigate to the next desired page using the **Next Page** and **Previous Page** buttons. Then, repeat Steps 2 - 3.
- Click the **Exit** button to close the document view window.

Creating a Clip Folder

1. Perform a search for the desired folder(s) using the **Search Folders** page.
2. From the **Folder** page, click on the **Clip Folder** icon corresponding to the desired

folder.

3. Enter a description for the Clip Folder in the **Description** field.
4. In the **Security** field, select either **Public** or **Private**.
5. Click the **Insert** button.
6. Click the **Back** button to return to the search result list.

Adding Documents to a Clip Folder

1. Search for the document within the folder you wish to “paper clip”. If this is not your own folder then you must select the reason for accessing a document from the **Reason** drop-down list.
2. Click the appropriate **Add Clip** icon to add a document to the Clip Folder.
3. Click the **Select** button to add the clip to the Clip Folder.
4. 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 paper clip, and then click the **Submit** button.

Viewing Documents within a Clip Folder

1. Perform a search for the desired folder(s) using the **Search Folders** page.
2. From the *Folder* page, select the reason for accessing the document from the **Reason** drop-down list.
3. Click the **Clip Folder** icon.
4. Click the **Detail** button next to the desired Clip Folder.
5. Click the **View Doc** icon to view the desired document in the Clip Folder

Removing a Document from a Paper Clip

1. Use the **Search Folders** page to locate the

desired folder(s).

2. Select the reason for accessing the document from the *Reason* drop-down list.
3. Click the *Clip Folder* icon.
4. Click the *Detail* button next to the desired Clip Folder.
5. Click the **Delete Doc** icon to delete the desired document.

Printing an eOPF Document

1. From the View Document page document, click the Print button, or select File-Print from the Adobe Reader menu toolbar.
 2. Search for and open the desired eOPF document.
 3. To prevent annotations from printing, ensure **View Documents Without Annotations** is selected from the **Annotation** field.
 4. On the **Document View window**, click the **Print** button, or select File-Print from the Adobe Reader menu.
 5. Ensure that your printer settings are correct.
- Note:** If you are printing a double-sided document, make sure that the printer selected is capable of performing duplex printing.
6. When you are done modifying the printer settings, click the OK button in the printer setup dialog box.
 7. Click the Close button to close out of the document view window.

Printing an Entire eOPF Folder

1. Click the **Print Folder** button on the eOPF menu.
2. In the **Enter SSN field**, enter the SSN matching the folder you wish to print, and click the submit button.
3. The **Verify Folder Information** page opens. The **Include Annotations** box will be unchecked because the default is set to print without annotations.
4. In the **Select Folder Side(s)** section, select

the Folder(s) you want to print.

5. From the **Printing Reason** drop-down list, select a reason for printing the folder.
 6. Click the **Print Double Sided** or the **Print Single Sided** button.
- Note:** If you select **Print Double Sided** mode, make sure that the printer selected is capable of performing duplex printing.
7. From Adobe Reader you can print the folder contents by clicking the **Print** button.
 8. Click the **Close** button to close out of the Adobe Reader.

Remove Documents from Folder (interim procedure)

Please Note: Once you delete a document, it is permanently removed from the system.

An eOPF system enhancement has been requested to change the **Delete Doc** icon function from purging the document out of the system to moving the document to the “Deleted” folder side. Documents in the Deleted folder side can not be seen by Employees, but the documents are not permanently removed from the system. HR System Administrators will be the only user group to have the authority to purge documents from OPFs.

Interim Procedure: Until the **Delete Doc** icon function is changed, HR Users should follow the following steps to remove a document from the left or right side of the OPF.

To Remove a Document from an Employee’s Folder

Search for and locate the eOPF document that you wish to remove. The **Results List** page displays.

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

Click the **Modify Doc Index** icon associated with the document you wish to move.

Select the “Deleted” *Folder Side* from the *Folder Side* drop-down list, and then click the

Save button. The **Results List** page reappears with the folder section changed.

To Scan a Single-Sided Document into eOPF

1. Search for the folder where you will place the new document: use the eOPF **Search Folders** page to find your employee.
2. From the **Folder** page, select the reason from the **Reason** drop-down list for working on the selected folder.
3. Click the **Add Doc** icon from the **Folder** page.
2. Place the document in the scanner according to the manufacturer’s instructions.
3. After the scanning interface opens, click **Scan**.
4. Verify the **ISIS** checkbox is selected, and then click the button.
5. Select the appropriate scanner from the **Source** dialog box and click the **Select** button. The document appears.
6. Click the **Save** button.

To Correct a Filing Error (Move a Document to Another Folder)

Use the **Search** feature to find the eOPF document that you wish to move to a different folder.

1. From the **Results List** page, select a reason from the **Reason** drop-down list.
2. Click the **Modify Doc Index** icon associated with the document you wish to move.
3. Type the correct employee’s SSN in the *SSN* field, and click the **Save** button. The **Move Document** confirmation box appears.
4. Click the **OK** button. The **Results List** page reappears with the document moved.

Moving Documents Between Folder Sections

Use the **Search** feature to find the eOPF document that you wish to move to a different section

1. From the **Results List** page, select a reason from the **Reason** drop-down list.
2. Click the **Modify Doc Index** icon associated with the document you wish to move.
3. Select the desired **Folder Section** from the *Folder* drop-down list, and then click the *Save* button. The **Results List** page reappears with the folder section changed.

Correcting Document Index Information

If you need to change the index information of a document, (e.g., if a mistake was made with indexing a newly scanned document) please follow the steps listed below:

1. Find the eOPF document that you wish to move to a different section.
2. Select a reason from the **Reason** drop-down list.
3. Locate the desired document, and then click the **Modify Document Index** icon to modify the document index.
4. Modify the desired index information, i.e., Effective Date, Form Name, Form Type, Print, and then click the **Save** button.

Where to get Help

For more information about eOPF refer to the online user guide at: <http://> (to be posted soon). If you require assistance in accessing the eOPF system, contact the eOPF Help Desk at eOPF.helpdesk@usda.gov or 866.275.8518. Please include the following: Name, Organization, Phone/email contact information, description of problem.