

**U. S. Office Of Personnel Management  
The e-Government Program Office**

# eOPF

ELECTRONIC OFFICIAL PERSONNEL FOLDER

## **eOPF Human Resources Specialist Training Manual**

**eOPF Version 4.0**



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**e-Solutions Support & Education**

**The United States Office Of Personnel Management eOPF<sup>®</sup> Human Resources  
Specialist Training Manual for eOPF Version 4.0.**

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eOPF Version 4.0, July 2007.

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# eOPF Human Resources Specialist Training Manual

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# **Chapter 1: Introduction To OPM eOPF**

The Northrop Grumman Corporation is helping The United States Office of Personnel Management (OPM) change the way Federal Government agencies maintain and access official personnel folders (OPF). Personnel offices across the nation are changing from a paper-based personnel records system to an electronic official personnel folder (eOPF) management system. All current paper OPF documents are uploaded into the Web-enabled Electronic Official Personnel Folder (eOPF) solution. In the future, all personnel actions will be performed electronically. That includes how you and your co-workers access your OPF and the OPFs of those whom you support. With personnel records being electronic files instead of paper, eOPFs can be viewed 24 hours a day, 7 days a week.

What is eOPF, and what does it mean to you? The eOPF solution is designed to electronically store, manage, and distribute OPF documents. eOPF stores all OPF documents as Portable Document Format (PDF) files, complete with data describing the folder and its contents.

Employees are able to view their own OPFs through this eOPF solution. eOPF allows supervisors to view the eOPFs of all of their subordinates. eOPF has multiple levels of access security to ensure that neither employees nor supervisors can change an eOPF at any time, in any manner. All access for regular users and supervisors is on a 'View Only' basis. eOPF security features also ensure the integrity of the eOPF solution. In addition, eOPF security logs and tracks every action performed within eOPF. That includes notification to employees every time a new document is added to their eOPFs.

This training session is designed to introduce you to the eOPF solution, and to familiarize you with what you may or may not do within eOPF based upon your security access level. In this course we are only concerned with Human Resources (HR) Specialists accessing their own eOPFs as



well as the eOPFs of personnel they are responsible for maintaining.

This HR Specialist Training Manual assumes that you have working knowledge of Microsoft Windows and the Internet. If you do not have access to the Internet or eOPF, please contact an eOPF administrator to assist you with the setup.

---

### **IMPORTANT!**

This HR Specialist Training Manual includes screens from the eOPF solution representative of what you may see; however, your system may appear slightly different depending upon your agency's requirements. In addition, some functionality, such as career briefs and position descriptions, is optional and may or may not be configured for your system.

---



## **Chapter 2: eOPF Browser And Viewer Requirements**

To access and use the eOPF solution, there are two basic “off-the-shelf” software requirements for the user’s PC: a Web browser application and Adobe Acrobat Reader.

### **2.1 Browsers**

Commercially available Web browsers can be used to access the eOPF solution. For best results, OPM recommends using the latest version of Microsoft Internet Explorer.

### **2.2 The eOPF Viewer**

The eOPF solution stores documents as Portable Document Format (PDF) files, which are viewed and printed using Adobe Reader. If you do not have Adobe Reader installed on your computer, you may download the free viewer off the Internet.

---

**Note:**

The Adobe Reader “options” should be set “not” to view inside the browser.

---





## Chapter 3: Getting Started With eOPF

Before using the OPM eOPF solution, you must login. Logging in requires a valid eOPF ID and password. Your eOPF account may be set up when your agency initially deploys eOPF, or when you first become an employee. If you do not have an eOPF ID and password, please contact your eOPF administrator to obtain one.

If you forget your password, a “Forgot Password” link is available on the eOPF Logon page. Enter your eOPF ID and click the ***Forgot your Password?*** link on the eOPF Logon page. eOPF generates a letter assigning you a new password. A new password is sent to you by either U.S. mail, or email. Your organization will advise you what to expect.

---

**Note:**

Both Single Sign On and eAuthenticate initiatives are being implemented for eOPF. If activated for your agency, you will no longer directly log into the eOPF application. In that case, you will connect to eOPF using an eAuthenticate type portal. When Single Sign On is used, the eOPF ID and password functionality will be disabled.

---

**Note:**

As an eOPF administrator, you can set the number of logon failures that personnel may be allowed before the user account is disabled. Typically, after three (3) consecutive failed attempts to logon to eOPF, the user account is “locked out” as a security precaution. eOPF administrators must reset the user account after the user exceeds the maximum number of failed logon attempts.

---



To ensure the data integrity and security of the OPM eOPF solution, you must remember to safeguard your eOPF ID and password. Some basic guidelines for maintaining your password security are as follows:

- ✚ Do not give your password to anyone.
- ✚ Do not write your password down.
- ✚ Do not let anyone logon with your eOPF ID or password, because eOPF will log and track all actions performed during your eOPF session to your eOPF ID and password.

### 3.1 Logging Into eOPF

To log into eOPF:

1. Launch the **eOPF** application by double-clicking the OPM **eOPF** shortcut on your desktop. The OPM Government Usage Agreement page appears with warnings and conditions for using the OPM site.

**New User** | [About the Agency](#) | [What's New](#) | [Quick Index](#) | [Operating Status](#) |

**Office of Personnel Management**  
The Federal Government's Human Resources Agency

[Strategic Management of Human Capital](#) | [Employment and Benefits](#) | [Career Opportunities](#)

You are here: [Home](#) > [egov](#) > EHRI eOPF

*Working for America*

This is an official U.S. Government System for authorized use only. Unauthorized use of this system or the information on this system could result in criminal prosecution. Signing into this application indicates you have read and accepted the [Full Terms and Conditions of Use](#) and you consent to secure testing and monitoring.

Signing into this application indicates you have read and accepted the [Privacy Policy](#), and you consent to secure testing and monitoring.

Signing into this application indicates you have read and accepted the [Rules of Behavior](#), and you consent to secure testing and monitoring.

To access your account information, your computer's assigned Internet Protocol (IP) address, which is controlled by your Internet Service Provider (ISP), must remain the same from the time you enter your user name and password on the Login Page until you leave the Account Access section.

Please be aware, you must have [Microsoft Internet Explorer](#) version 6.0 or higher and [Adobe Acrobat Reader](#) version 6.01 or higher to run this application software. JavaScript must be enabled to use the eOPF application.

**Agency Specific Message**

Office of Personnel Management  
1900 E Street NW, Washington, DC 20415-1000 | (202) 606-1800 | TTY (202) 606-2532

[Contact Us](#) | [Forms](#) | [FAQ's](#) | [Products & Services](#)

[Site Index](#) | A-Z



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**Note:**

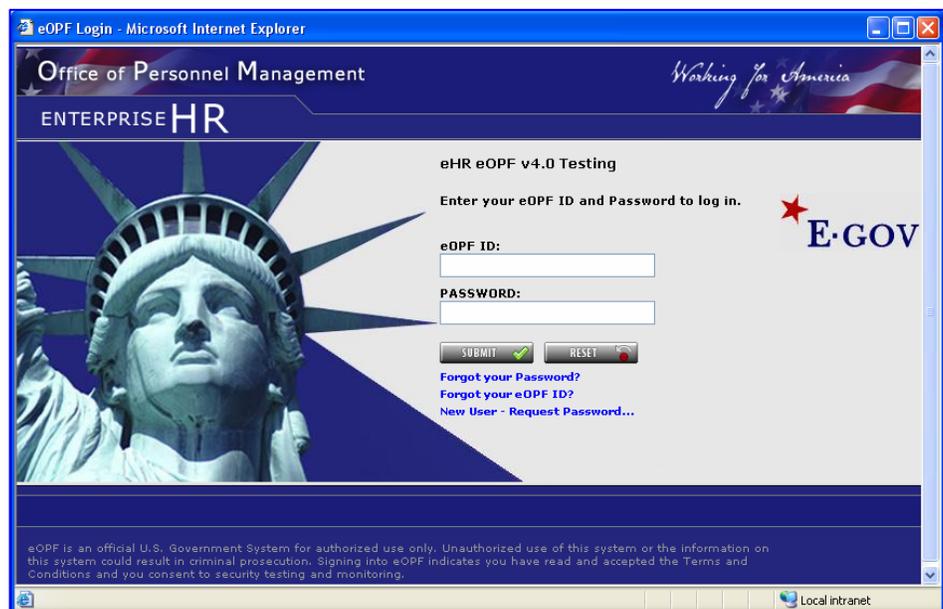
The OPM URL address for eOPF will be announced at the time of deployment, or you may obtain the address from OPM eOPF administrators.

---

2. Read the **User Agreement**, and click the **Accept**

 button.

The **eOPF Logon** page appears.



3. In the **eOPF ID** field, enter your eOPF ID.
4. In the **Password** field, enter your password.
5. **Optional:** If you are a new user, click the **New User-Request Password...** link.  
The **New User – Request Password** page appears allowing you to request your new password.
6. Click the **Submit**  button.  
If you have logged into this eOPF version previously, the **eOPF Welcome** page appears.



---

**Note:**

The first time that you logon to eOPF, the *Change your Password* page appears displaying a message that your password has expired. Change your password in accordance with your password security requirements.

---

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**Note:**

If you are logging into eOPF v4.0 for the first time, you will be forwarded to the Select Security Questions page. Here you will be required to answer security questions that only you would know the correct answers.

---

The **Select Security Questions** page appears below.

**Select and answer your security questions**

**Purpose:** The following security questions will be used to verify your identity if you forget your password or eOPF ID. You can modify the answers using 'My Profile' after you login.

Email Address:

Check here, if you are using assistive technology? (ex: Screen Reader)

**Personal Questions**  
Please select and answer all questions below.

What are the last 4 digits of your SSN?(Ex: 1234)

What are the last 4 digits of your SSN?(Ex: 1234)

What are the last 4 digits of your SSN?(Ex: 1234)

**Helpdesk Verification Questions**  
Please select and answer all questions below.

What is your mother's birth date?(Ex: 09/14/1950)

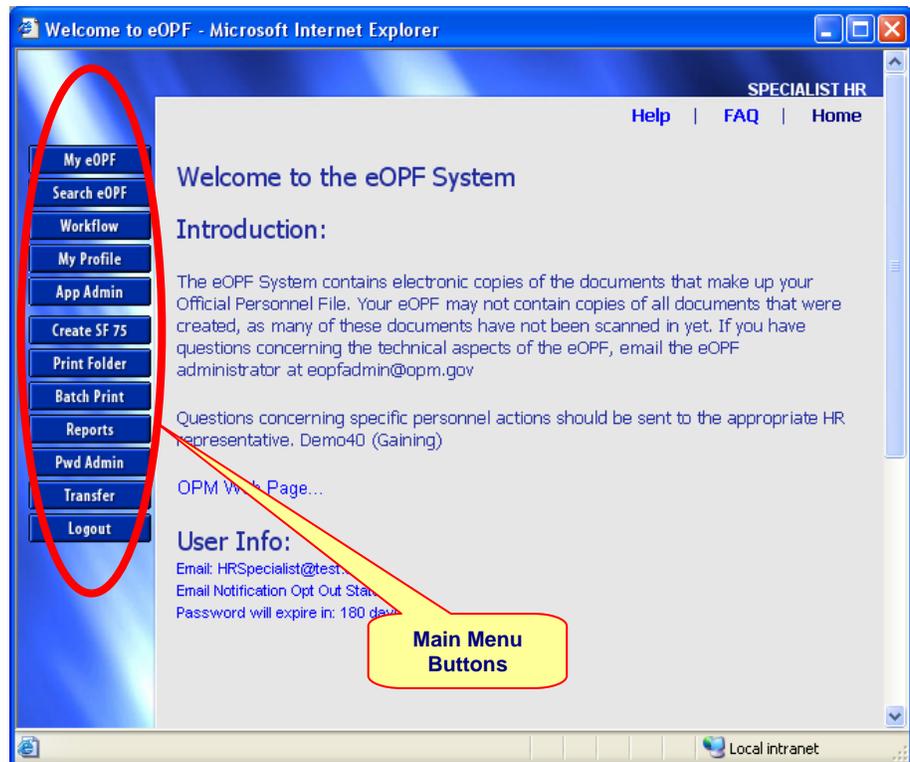
What is your mother's birth date?(Ex: 09/14/1950)

What is your mother's birth date?(Ex: 09/14/1950)

**Note:** Answers to the above questions are required to proceed into eOPF. Clicking Cancel will exit you out of the application.



The **eOPF Welcome** page is shown below:



---

**Note:**

Your Main Menu buttons may appear slightly different from the example above. The main menu buttons are dynamically activated by your role within eOPF and your security access permissions.

---

## 3.2 Changing Your Preferences

The OPM eOPF solution allows you to set preferences within the application. There are two types of preferences: General and Workflow. Workflow is only accessible if you have a workflow enabled account.

From the General Preferences tab, you can set your default forms list on the Search page and which columns to display in the result set.



## To change your general preferences:

1. From the eOPF main menu, click the **My Profile**

 button.

The **General Preferences**  tab of the **My Profile** page displays by default.

2. Type your desired number of rows per page in the **Number of Rows per Page (Display)** field.
3. Select which fields you would like to see for each section.
4. Select if you are using Assistive Technology.

5. Click the **Apply**  button.

The **General Preferences** page reappears displaying the following message: **“Settings updated. Some of these settings will take effect next time you log into eOPF.”**



### 3.3 Your Email Address

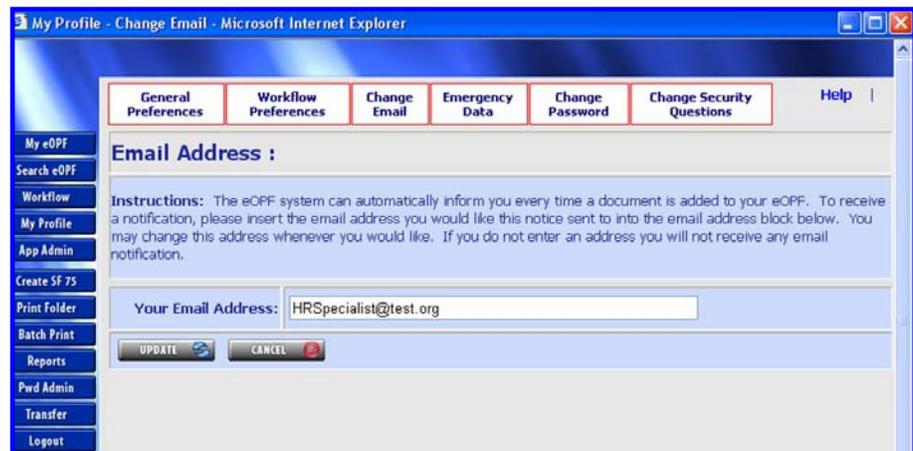
The OPM eOPF solution notifies you by email every time a new document is added to your eOPF. Your agency will provide guidance as to whether or not you can change your email address.

**To change your email address:**

1. From the eOPF main menu, click the **My Profile**

 button.

The **General Preferences** tab of the **My Profile** page displays by default.



2. Click the **Change Email**  tab at the top of the page.

The **Change Email** page appears.

3. Type your email address into the field provided.

4. Click the **Update**  button.

The **Change Email** page reappears displaying the following message: **“Email Address updated successfully.”**



## 3.4 Viewing And Updating Emergency Data

The OPM eOPF solution 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. From the eOPF main menu, click the **My Profile**

**My Profile** button.

The **General Preferences** tab of the **My Profile** page displays by default.

2. Click the **Emergency Data**  tab at the top of the page.

The **Emergency Data** page appears.

3. Edit the desired fields, and then click the **Apply**

**APPLY** button.

The **Emergency Data** page reappears displaying the message “**Emergency data updated successfully.**”



## 3.5 Managing Your eOPF Password

eOPF gives you the ability to change your password anytime. For example, your password may have been compromised or you may need to synchronize your eOPF password with your network password.

---

### **Note:**

The following topic is only relevant if you are using the traditional eOPF login page requiring an eOPF ID and password. As agencies implement Single Sign On and eAuthenticate, the need to maintain a specific eOPF ID and password will cease to exist.

---

When you change your password, you must ensure that your new password adheres to all requirements that your eOPF administrator has defined. Your administrator may require that you use a combination of the following:

- ✚ Minimum number of 8 characters.
- ✚ At least one uppercase or lowercase letter.
- ✚ At least one number.
- ✚ At least one special character such as:  
(!, @, #, \$, %, ^, &, ( ), +, { }, [ ], ;, >, etc.)
- ✚ Password expiration period.

### **To change your password:**

1. From the eOPF main menu, click the **My Profile**

 button.

The **General Preferences** tab of the **My Profile** page displays by default.

2. Click the **Change Password**  tab at the top of the page.

The **Change Password** page appears.



3. Enter your current password in the **Old Password** field.

**Change Password :**  
Allow user to change Password.  
**Note: Password must contain at least one upper-case letter, one lower-case letter, one number and one special character and must be at least 8 characters in length.**

|                  |                      |
|------------------|----------------------|
| Old Password:    | <input type="text"/> |
| New Password:    | <input type="text"/> |
| Verify Password: | <input type="text"/> |

4. In the **New Password** field, enter your new password.
5. In the **Verify Password** field, enter your new password again.
6. Click the **Update** button to update your eOPF password.  
Click the **Cancel** button to cancel the password change.  
The **eOPF Welcome** page appears with the number of days when the password expires.

### 3.6 Change Security Questions

eOPF allows you to manually change your security questions at any time.

**To change your security questions:**

1. From the eOPF main menu, click the **My Profile**

button.

The **General Preferences** tab of the **My Profile** page displays by default.

2. Click the **Change Security Questions**

Change Security Questions

tab at the top of the page.

The **Change Security Questions** page appears.



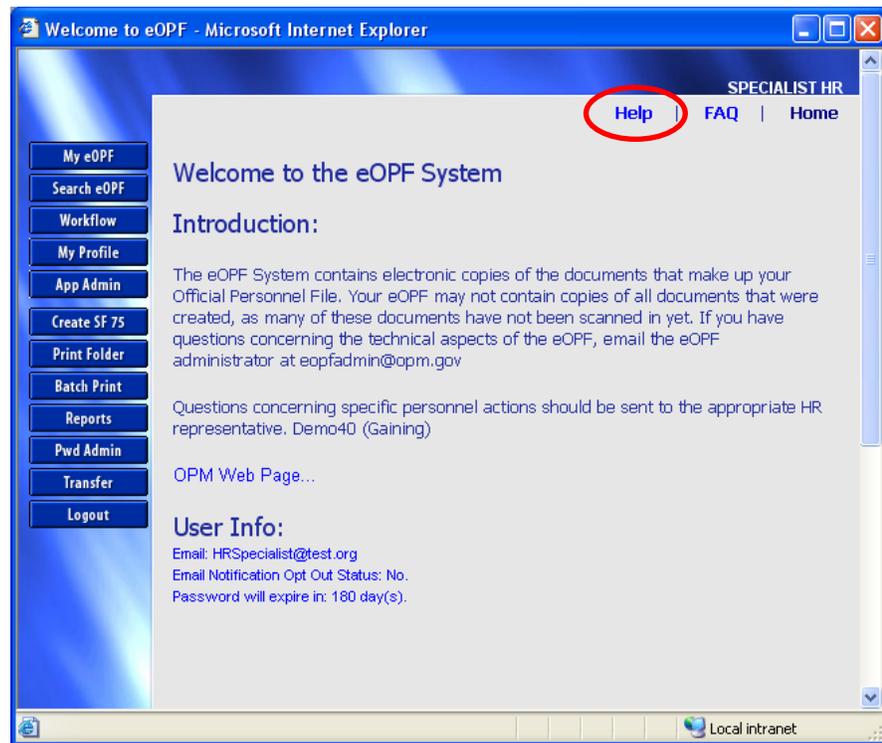
3. Select the security question(s) you would like to change by clicking the appropriate drop-down arrow. Once you select your new security question(s), type the correct answer in the box to the right of the question.
4. Click the **Update**  button to update your security questions. The **Change Security Questions** page reappears displaying the message “**Security questions updated successfully.**”

### 3.7 Accessing Online Help

The OPM eOPF solution allows you to access on-line help for just in time tutorial or refresher training.

#### To access online help:

1. Click the **Help** link in the upper right corner of an eOPF page.



2. Search to locate information about eOPF functionality and procedures

### 3.8 Accessing Frequently Asked Questions (FAQ)

The OPM eOPF solution provides answers to frequently asked questions on its FAQ page.

**To access the FAQ page:**

1. Click on the **FAQ** link in the upper right corner of an eOPF page.



2. Browse the FAQ page to learn answers to the questions most people are asking.

You could get answers to questions similar to the following:

- ✚ What is the OPM eOPF solution?
- ✚ What eOPF questions do people ask most often?
- ✚ What is new in eOPF?
- ✚ What kinds of technical issues may we encounter?
- ✚ Who do I call when I need help with eOPF?



### 3.9 Using The Home Link

The OPM eOPF solution allows you to return to the **eOPF Welcome** page by clicking the **Home** link in the upper right corner of any eOPF page.





## Chapter 4: Viewing eOPF Documents

eOPF organizes and manages personnel documents within an electronic folder. All Federal government employees have an eOPF with all of their personnel documents organized in the same manner as the traditional OPF.

### 4.1 Viewing Your eOPF Documents

To view eOPF documents:

1. Logon to the OPM eOPF solution.
2. Click either the **My eOPF** or the **Search eOPF** button to access your eOPF.
  - ✚ **My eOPF** lists your documents from the most recent effective date.
  - ✚ **Search eOPF** allows you to view:
    - ❖ Particular documents.
    - ❖ Your entire eOPF.



My eOPF: STEVE CRAWFORD

Annotation: View documents with annotations

SHOW ALL DOCS CANCEL

| Action | SSN         | Latest Eff. Date | PO ID | Org Code | Activity Code |
|--------|-------------|------------------|-------|----------|---------------|
|        | 888-00-0004 | 01/11/2004       | 1001  | 01D      | A             |

102 document(s) returned.

Prev 1 2 3 4 5 Next

| Action | Effective Date | Form Number | Type                  | NOA Code |
|--------|----------------|-------------|-----------------------|----------|
|        | 01/11/2004     | SF 50       | PAY ADJ               | 894      |
|        | 11/05/2003     | SF 50       | INDIVIDUAL CASH AWARD | 840      |
|        | 12/03/2002     | SF 50       | INDIVIDUAL CASH AWARD | 840      |
|        | 10/17/2002     | SF 50       | GROUP CASH AWARD      | 841      |
|        | 09/22/2002     | SF 50       | WITHIN-GRADE INC      | 893      |
|        | 02/04/2002     | SF 50-B     | INDIVIDUAL CASH AWARD | 840      |

- Click the **Action** icon next to the document that you want to view.  
Your security options for the selected document appear.

102 document(s) returned.

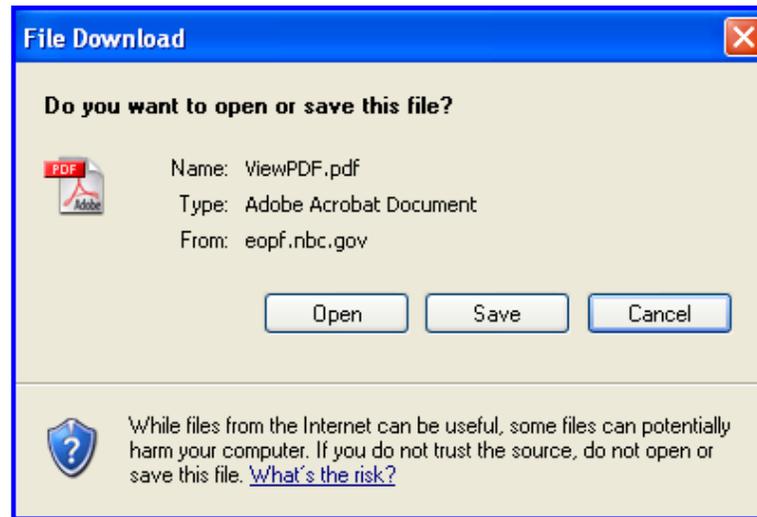
Prev 1 2

| Action | Effective Date | Form Number | Type                  | NOA Code |
|--------|----------------|-------------|-----------------------|----------|
|        | 01/11/2004     | SF 50       | PAY ADJ               | 894      |
|        | 11/05/2003     | SF 50       | INDIVIDUAL CASH AWARD | 840      |
|        | 12/03/2002     | SF 50       | INDIVIDUAL CAS        | 840      |
|        |                | SF 50       | GROUP CASH AWARD      | 841      |
|        |                | SF 50       | WITHIN-GRADE INC      | 893      |
|        | 02/04/2002     | SF 50-B     | INDIVIDUAL CASH AWARD | 840      |
|        | 01/18/2002     | SF 50-B     | PAY ADJ               | 894      |
|        | 01/14/2001     | SF 50-B     | PAY ADJ               | 894      |
|        | 03/22/2000     | SF 50-B     | PERFORMANCE AWARD     | 885      |
|        | 01/02/2000     | SF 50-B     | PAY ADJ               | 894      |

- Select the **View** **View** option.  
The document you want to view launches Adobe Reader allowing you to view the document.



5. Click the **Open**  button when the **File Download** box displays.  
The Adobe Acrobat Reader is opened and the selected document is displayed.



6. Click the **Close**  button when finished viewing the document to return to eOPF.

---

**Note:**

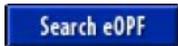
Every time an eOPF document is viewed, that action is logged electronically.

---

## 4.2 Searching For eOPF Documents

eOPF search capabilities allow you to search and filter the search results according to your particular document requirements. You should try searching using different search criteria to learn how to locate desired documents in the manner that is most effective for you.

### To search for eOPF documents:

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



**Search Folders : (HR Specialist)**

SEARCH CLEAR BACK

PO ID  Org Code  Activity Code  Employee ID

SSN #  Date of Birth  NOA Code 1  NOA Code 2

Last Name  First Name  NAME SEARCH  Query Package

Form  Common Forms  All Forms  Agency Forms

All

Type

All

Folder Sides  Select All

Temporary  Permanent  Performance  Training  Deleted  Cancellation  Transferred

Create Date  Start Eff. Date  End Eff. Date

Include Empty Folders

SEARCH CLEAR BACK

### Note:

eOPF has “wildcard” characters to filter searches. The ‘%’ character represents multiple characters; the ‘\_’ character represents a single character. For example:

- ❖ A% returns anything that starts with the letter A (e.g. AA, AAA, ABA, ABC, etc.).
- ❖ A\_ returns anything that starts with the letter A, plus one additional character (e.g. AA, AB, AC, etc.).
- ❖ 1% returns 11, 123, 1234, 12345, etc.
- ❖ 1\_ returns 11, 12, 13, 14, 15, etc.

2. Enter search criteria for particular eOPF document(s) and click the **Search**  button.
3. Click the **Folder Action**  icon of the folder to be viewed and select the **Open**  **Open** option to display the documents in the chosen folder.



Reason: Annual Review Annotation: View documents with annotations

SHOW ALL DOCS CANCEL

18 folder(s) returned.

| Action | SSN         | Last Name  | First Name | Latest Eff. Date | PO ID | Org Code | Activity Code |
|--------|-------------|------------|------------|------------------|-------|----------|---------------|
| ▶      | 000-00-0003 | BECK       | FRED       | 02/08/2004       | 1001  | O1C      | A             |
| ▶      | 000-00-0011 | BROWN      | LEROY      | 04/25/2007       | 1001  | O2B      | A             |
| ▶      | 000-00-0010 | CHEEKS     | MARY       | 01/12/2003       | 1001  | O2A      | A             |
| ▶      | 000-00-0004 | CRAWFORD   | STEVE      | 01/11/2004       | 1001  | O1D      | A             |
| ▶      | 000-00-0013 | HANS-SMITH | CINDY      | 01/15/2004       | 1001  | O2D      | A             |

4. Click the **Action**  icon next to the document that you would like to view and select the appropriate action.

Reason: Annual Review Annotation: View documents with annotations

SHOW ALL DOCS CANCEL

18 folder(s) returned.

| Action | SSN         | Last Name  | First Name | Latest Eff. Date | PO ID | Org Code | Activity Code |
|--------|-------------|------------|------------|------------------|-------|----------|---------------|
| ▶      | 000-00-0003 | BECK       | FRED       | 02/08/2004       | 1001  | O1C      | A             |
| ▶      | 000-00-0011 | BROWN      | LEROY      | 04/25/2007       | 1001  | O2B      | A             |
| ▶      | 000-00-0010 | CHEEKS     | MARY       | 01/12/2003       | 1001  | O2A      | A             |
| ▶      | 000-00-0004 | CRAWFORD   | STEVE      | 01/11/2004       | 1001  | O1D      | A             |
| ▶      | 000-00-0013 | HANS-SMITH | CINDY      | 01/15/2004       | 1001  | O2D      | A             |

27 Common document(s) returned for: BECK, FRED

Prev 1 2 Next

| Action  | Effective Date | Form Number | Type             | NOA Code 1 |
|---|----------------|-------------|------------------|------------|
|  | 02/08/2004     | SF 50       | REALIGNMENT      | 790        |
|  | 09/07/2003     | SF 50       | WITHIN-GRADE INC | 893        |
|  | 01/12/2003     | SF 50       | PAY ADJ          | 894        |

### 4.3 Viewing eOPF Document Annotations

The OPM eOPF solution has an annotation feature that allows HR specialists to make annotations on documents, which are preserved as a layer that sits on top of the original document. Annotations can be viewed and/or printed with the original document. As an HR specialist, you may annotate any document that is not part of your own eOPF. In addition, if multiple HR specialists make annotations, they are each saved as a separate layer, which provides information about who added what information.



Annotations are added to each individual page of a document. As a result, you must navigate to each page to view the annotations on that particular page.

---

**Note:**

There are two classifications of an annotation: **Public** and **Private**. A Public annotation may be viewed by anyone who views the eOPF document. Private annotations can only be viewed and/or edited by the user who created the annotation or an authorized HR specialist.

---

**To view eOPF document annotations:**

1. Click either **My eOPF**  or the **Search eOPF**  button to locate the annotated document. **“View documents with annotations”** is the default selection at the top of the display.



The screenshot shows the eOPF system interface. On the left is a navigation menu with buttons for Search eOPF, Workflow, My Profile, App Admin, Create SF 75, Print Folder, Batch Print, Reports, Pwd Admin, Transfer, and Logout. The main area displays a search filter for 'Annotation: View documents with annotations' with 'SHOW ALL DOCS' and 'CANCEL' buttons. Below this is a table with columns: Action, SSN, Latest Eff. Date, PO ID, and Org Code. The table contains one row with a folder icon, SSN 000-00-0004, Latest Eff. Date 01/11/2004, PO ID 1001, and Org Code 01D. Below the table, it says '102 document(s) returned.' and 'Prev 1 2'. Another table below shows document details with columns: Action, Effective Date, Form Number, Type, and NOA Code. The first row has an 'A' icon, Effective Date 01/11/2004, Form Number SF 50, Type PAY ADJ, and NOA Code 894. The second row has an 'A' icon, Effective Date 11/05/2003, Form Number SF 50, Type INDIVIDUAL CASH AWARD, and NOA Code 840.

2. Click the **Action**  icon next to the document that you would like to view and select the **View**  **View** option. Your eOPF document will open in Adobe Reader.



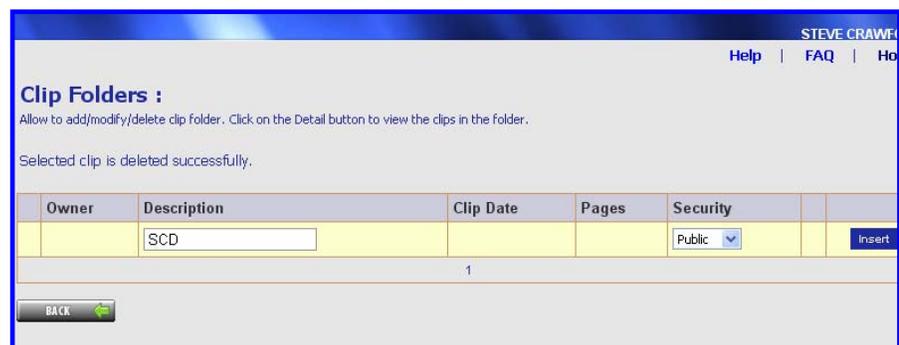
## 4.4 Creating And Adding Pages To Clip Folders

eOPF allows you to group pages and/or documents from the same folder together so that you may conduct a records audit or review. You determine whether or not you need individual pages or the entire document.

Creating a Clip Folder is a two-step process. The first step is to create a new clip folder. Then, you must select the pages you want to add to the clip folder.

### To create a new clip folder:

1. Search for and open the desired folder.
2. Click the **Folder Action**  icon and select the **Clip Folder**  **Clip Folder** option.  
The **Clip Folders** page appears.



| Owner | Description | Clip Date | Pages | Security |        |
|-------|-------------|-----------|-------|----------|--------|
|       | SCD         |           |       | Public   | Insert |

3. Enter a description for the clip folder in the **Description** field.  
For maximum usability, use specific HR terms and/or actions in the **Description** field.
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 Results** page.




---

**Note:**

A clip folder is classified as **Public** or **Private**. Any user accessing the selected folder can view a public clip folder; however, ONLY the user that created the clip folder and authorized HR specialists can view a private clip folder.

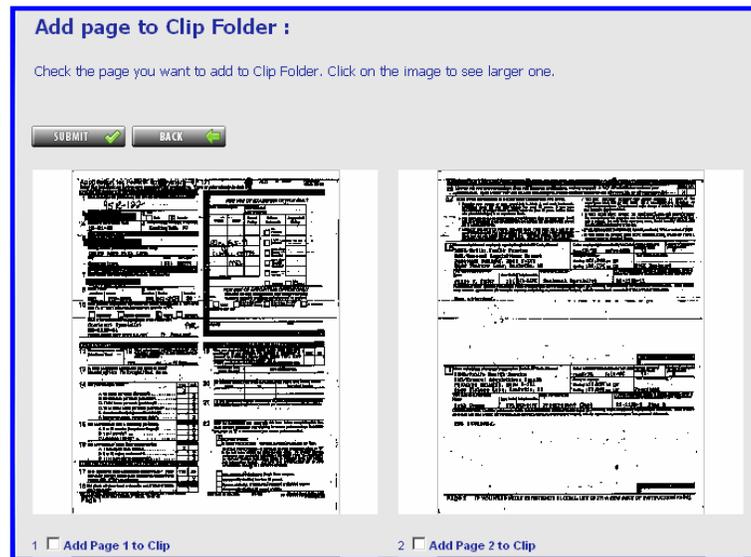
---

**To add individual pages to a clip folder:**

1. Search within the folder for the documents you wish to clip together.  
If this is not your own folder, you must select a reason for accessing a document from the **Reason** drop-down list.
2. Click the **Action**  icon next to the document that you want added to the clip folder, and click the **Add to Clip** option.  
The **Add Clip to Clip Folder** page appears.

|        | Owner           | Description | Clip Date           | Pages | Security |
|--------|-----------------|-------------|---------------------|-------|----------|
| Select | CRAWFORD, STEVE | SCD         | 7/5/2007 2:19:38 PM | 0     | Public   |

3. Click the **Select**  button to add pages to the clip folder.  
The **Add Page to Clip Folder** page appears.



4. Click the checkbox under each page that you want added to the clip folder, and click the **Submit**  button.

A confirmation page appears.

5. Click the **OK**  button.  
The **Search Results** page reappears.

### To add multiple documents to a clip folder:

1. Search within the folder for the documents you wish to clip together.  
If this is not your own folder, you must select a reason for accessing a document from the **Reason** drop-down list.
2. Click the **Show All Docs**  button.  
The **Show All Documents** page appears.



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 | DELETE SELECTED | ADD TO CLIP | CANCEL

CHECK ALL | UNCHECK ALL

Printer friendly version of result list

81 Common document(s) returned in 1 folders. Prev 1 2 Next

| Check                    | SSN         | Effective Date | Form Number | Type             | NOA Code 1 | Side      |
|--------------------------|-------------|----------------|-------------|------------------|------------|-----------|
| <input type="checkbox"/> | 000-00-0018 | 04/04/2004     | SF 50       | REASSIGNMENT     | 721        | Temporary |
| <input type="checkbox"/> | 000-00-0018 | 01/11/2004     | SF 50       | PAY ADJ          | 894        | Temporary |
| <input type="checkbox"/> | 000-00-0018 | 02/23/2003     | SF 50       | REALIGNMENT      | 790        | Temporary |
| <input type="checkbox"/> | 000-00-0018 | 02/09/2003     | SF 50       | PROMOTION        | 702        | Temporary |
| <input type="checkbox"/> | 000-00-0018 | 02/09/2003     | SF 52       | PROMOTION        | 702        | Permanent |
| <input type="checkbox"/> | 000-00-0018 | 12/01/2002     | SF 50       | REASSIGNMENT     | 721        | Temporary |
| <input type="checkbox"/> | 000-00-0018 | 05/05/2002     | SF 50       | WITHIN-GRADE INC | 893        | Temporary |

- Click the checkbox for the documents you want to add to the clip folder.
- Click the **Add to Clip** button. The **Add Clip to Clip Folder** page appears.

STEVE CRA

Help | FAQ

**Add Clip to Clip Folder :**

Select the clip folder you want to add the clip to.

1

|        | Owner           | Description | Clip Date           | Pages | Security |
|--------|-----------------|-------------|---------------------|-------|----------|
| Select | CRAWFORD, STEVE | SCD         | 7/5/2007 2:19:38 PM | 1     | Public   |

1

BACK

- Click the **Select** button to add the documents to the clip folder. A confirmation page appears.

STEVE CRAWFORD

Help | FAQ | Home

Pages have been successfully added to the Clip Folder.

OK

- Click the **OK** button. The **Search Results** page reappears.



## Chapter 5: Printing eOPF Documents

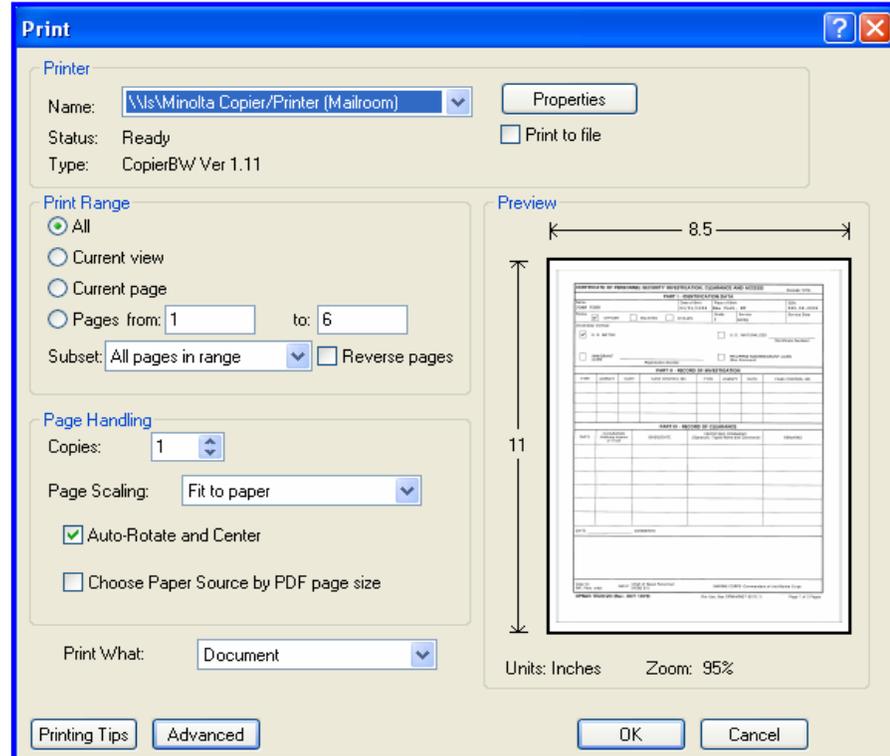
Although the eOPF solution is a paperless Official Personnel Folder system, there may be times when you will need a hard copy of an eOPF document.

You may choose to print one or more of your eOPF documents. You may also choose to print documents with or without electronic annotations. Annotations are like notes that you may make on a paper document.

### 5.1 Printing An eOPF Document

**To print an eOPF document:**

1. Locate the eOPF document you want to print.
2. Click the **Action**  icon next to the document that you would like to print and select the **View**  **View** option. The document opens in the eOPF viewer.
3. Click the **Print** button. The standard Windows **Print** dialog box appears.



### Note:

If you are printing a double-sided document, you must ensure that the printer is capable of duplex printing.

4. Ensure that your printer settings are correct.
5. Click the **OK**  button to print your document.
6. Click the **Close**  button to close the document viewer.

## 5.2 Printing Multiple eOPF Documents

eOPF permits you to print one or more documents from the **Show All Documents** page. A watermark of the OPM logo is added to the bottom, center margin of documents when printed from the **Show All Documents** page.



### To print two or more eOPF documents:

1. Click the **Search eOPF**  button.  
The **Search eOPF** page opens.
2. Enter search criteria and click the **Search**  button.  
The **Search Results** page appears.
3. Click the **Show All Docs**  button.  
The **Show All Documents** page appears with all documents that meet the search criteria.
4. Click the checkbox for documents to print, or click the **Check All**  button to select them all.  
All selected documents are merged into one document displayed in the viewer.



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.

Printer friendly version of result list

81 Common document(s) returned in 1 folders. Prev 1 2 Next

| Check                    | SSN         | Effective Date | Form Number | Type                | NOA Code 1 | Side               |
|--------------------------|-------------|----------------|-------------|---------------------|------------|--------------------|
| <input type="checkbox"/> | 000-00-0018 | 04/04/2004     | SF 50       | REASSIGNMENT        | 721        | Temporary          |
| <input type="checkbox"/> | 000-00-0018 | 01/11/2004     | SF 50       | PAY ADJ             | 894        | Temporary          |
| <input type="checkbox"/> | 000-00-0018 | 02/23/2003     | SF 50       | REALIGNMENT         | 790        | Row 2, NOA Code 1: |
| <input type="checkbox"/> | 000-00-0018 | 02/09/2003     | SF 50       | PROMOTION           | 702        | Temporary          |
| <input type="checkbox"/> | 000-00-0018 | 02/09/2003     | SF 52       | PROMOTION           | 702        | Permanent          |
| <input type="checkbox"/> | 000-00-0018 | 12/01/2002     | SF 50       | REASSIGNMENT        | 721        | Temporary          |
| <input type="checkbox"/> | 000-00-0018 | 05/05/2002     | SF 50       | WITHIN-GRADE INC    | 893        | Temporary          |
| <input type="checkbox"/> | 000-00-0018 | 01/13/2002     | SF 50-B     | PAY ADJ             | 894        | Temporary          |
| <input type="checkbox"/> | 000-00-0018 | 09/09/2001     | SF 50-B     | REALIGNMENT         | 790        | Temporary          |
| <input type="checkbox"/> | 000-00-0018 | 07/15/2001     | SF 50-B     | REALIGNMENT         | 790        | Temporary          |
| <input type="checkbox"/> | 000-00-0018 | 05/06/2001     | SF 50-B     | CORRECTION          | 002        | Temporary          |
| <input type="checkbox"/> | 000-00-0018 | 04/22/2001     | SF 50-B     | WITHIN-GRADE INC    | 893        | Temporary          |
| <input type="checkbox"/> | 000-00-0018 | 01/14/2001     | SF 50-B     | PAY ADJ             | 894        | Temporary          |
| <input type="checkbox"/> | 000-00-0018 | 04/23/2000     | SF 50-B     | WITHIN-GRADE INC    | 893        | Temporary          |
| <input type="checkbox"/> | 000-00-0018 | 01/03/2000     | SF 50-B     | PAY ADJ             | 894        | Temporary          |
| <input type="checkbox"/> | 000-00-0018 | 11/08/1999     | SF 50-B     | CHG IN DATA ELEMENT | 800        | Temporary          |

5. Click the desired **Print** button.  
The documents print single sided or double-sided according to the settings for the designated printer.





## Chapter 6: Adding eOPF Documents

eOPF enables HR specialists and eOPF administrators to manually add new documents into the system. Authorized users may either import electronic files or scan paper documents into the database.

### 6.1 Adding Electronic Documents To The eOPF

eOPF allows users to import electronic documents into the eOPF. eOPF supports files that are scanned, images, Microsoft Word, and many other types of electronic files.

**To import an eOPF document:**

1. Search for the employee eOPF to which you need to add the new document.
2. Select a **Reason** for viewing the eOPF.
3. Click the **Folder Action**  icon of the folder and select the **Add Doc**  **Add Doc** option.
4. Click the **Open**  button.  
The **Select Local File to import** dialog box appears.
5. Search for and select the desired file, and click the **Open**  button.  
The selected file appears.
6. Click the **Save**  button.  
The **Document Information** dialog box appears. The First Name, Last Name, and SSN fields will be completed based upon the SSN of the selected folder.



7. Complete all known indexing information to describe the new document that you are adding to the OPF. Add as a minimum:

- From the **Form** drop-down list.
- From the **Type** drop-down list.
- Select the **Effective Date** of the action.
- Select the **Folder Side** on which the document will reside.

**Document Information**

**Include Obsolete Forms**

Form: SF 50 NOTIFICATION OF PERSONNEL ACTION

Type: CANCELLATION

NDA Code: 1

NDA Code 2: 894

Insert into Workflow:  
Flow: Default Process

Effective Date: 07/24/2005

| Sun | Mon | Tue | Wed | Thu | Fri | Sat |
|-----|-----|-----|-----|-----|-----|-----|
| 26  | 27  | 28  | 29  | 30  | 1   | 2   |
| 3   | 4   | 5   | 6   | 7   | 8   | 9   |
| 10  | 11  | 12  | 13  | 14  | 15  | 16  |
| 17  | 18  | 19  | 20  | 21  | 22  | 23  |
| 24  | 25  | 26  | 27  | 28  | 29  | 30  |
| 31  | 1   | 2   | 3   | 4   | 5   | 6   |

Today: 7/25/2005

Folder Side:

- Temporary
- Permanent
- Performance
- Overseas
- Training
- Deleted
- Agency Specific

User Information:

SSN: 000-00-1111

First Name: JOE

Last Name: BASIC

Don't know the SSN? Click "Find".

8. Verify your indexing information and click the **Save**



button.  
A confirmation box appears.

9. Double-check your information is accurate, and click the

**Yes**  button to save the indexing information.

A confirmation box appears.

10. Click the **OK**  button to confirm that the indexing information is correct.

11. Click the **Exit**  button.



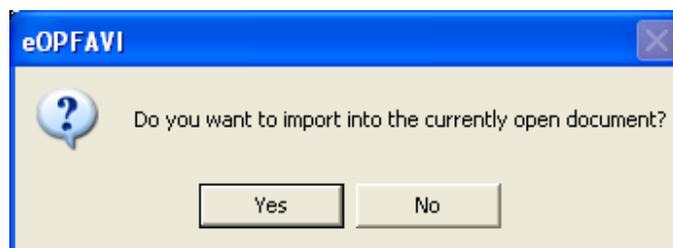
- Click the "[Please click here to return to eOPF](#)" link.  
The **Search Results** page reappears.

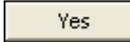
## 6.2 Importing A New Page Into An Existing eOPF Document

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

**To insert a new page from an electronic file:**

- Search for the employee eOPF to which you need to add the new document.
- Select a **Reason** for viewing the eOPF.
- Click the **Action**  icon next to the document that has to be modified and select the **Modify**  **Modify** option.
- Click the **Import**  **Import** button.  
A confirmation pop-up box appears.



- Click **Yes**  button.  
The **Page Import** dialog box appears.
- Select the desired document, and click the **OK**  button.  
A confirmation box displays the following message "**New page was saved successfully.**"  
Click the **OK**  button.



7. Click the **Exit**  button.
8. Click the "[Please click here to return to eOPF](#)" link.  
The **Search Results** page reappears.

### 6.3 Modifying Document Index Information

Sometimes you may need to change the indexing information in eOPF to match the official document. For example, if a mistake was made with the indexing when a scanned document was entered into eOPF, users can correct it with this option.

**To modify a document index:**

1. Select a **Reason** for viewing the eOPF.
2. Click the **Action**  icon next to the document that has the incorrect indexing information and select the **Modify Index**  **Modify Index** option.  
The **Modify Document Index** page appears.

3. Modify the incorrect indexing information (e.g., *Effective Date, Form Name, Form Type, Folder Side*) and click the **Save**  button.  
The **Search Results** page reappears with the correct indexing information displayed.



## Chapter 7: 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 creates and defines the various reports HR specialists can view, print, and export if needed.

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 whom, and when. System Access reports detail system access. System Integrity reports verify data integrity of the repository if there is a system or hardware failure, or some system threat. If you need different reports, request that your eOPF system administrator create the new report.

### 7.1 Viewing And Printing Reports And Logs

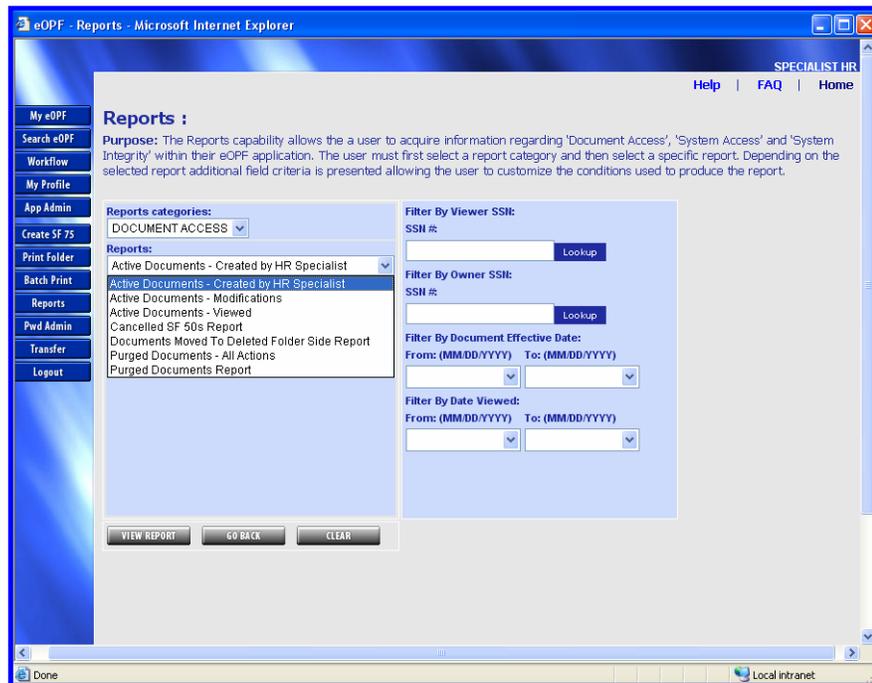
HR specialists may view and print reports on demand. The procedure is the same for viewing all of the reports.

#### To view and/or print an eOPF report:

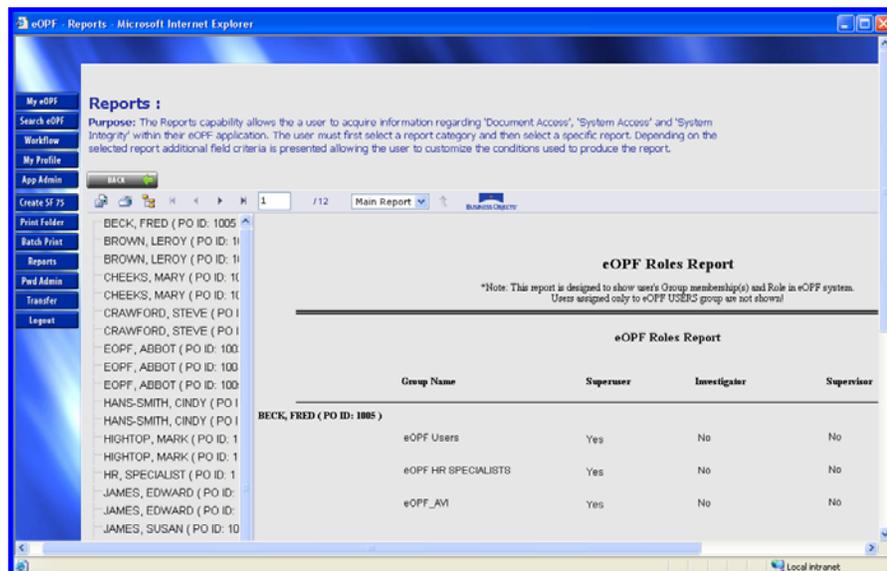
1. From the eOPF main menu, click the **Reports**

 button.

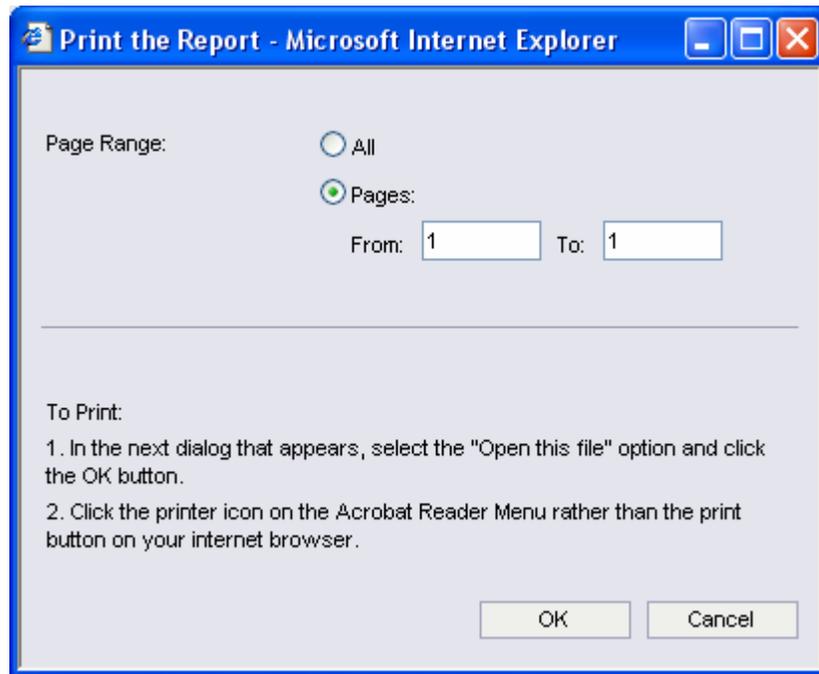
The **Reports** page appears.



2. Select from **Report categories**, the desired **Reports**, and input report filters.
3. Click the **View Report**  button. The report appears.

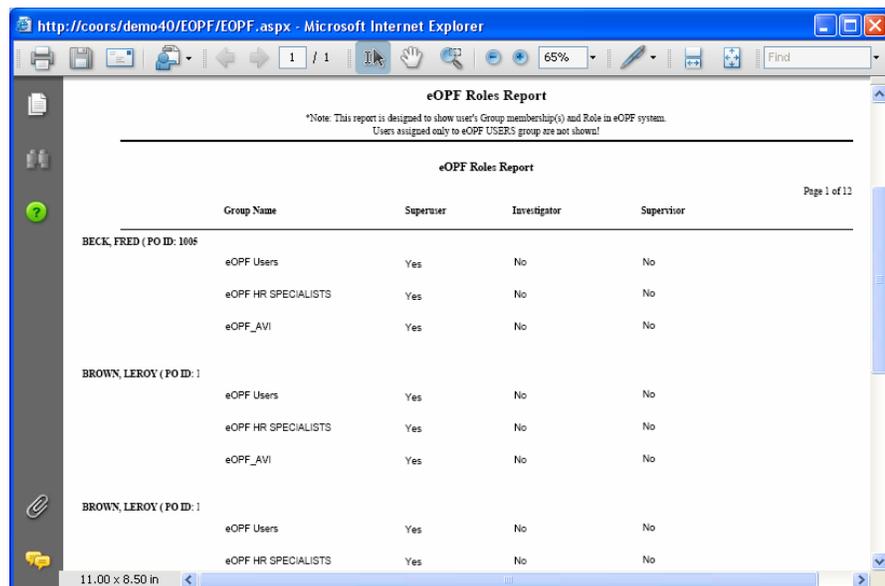


4. Click the **Print**  button. The **Print the Report** box appears.

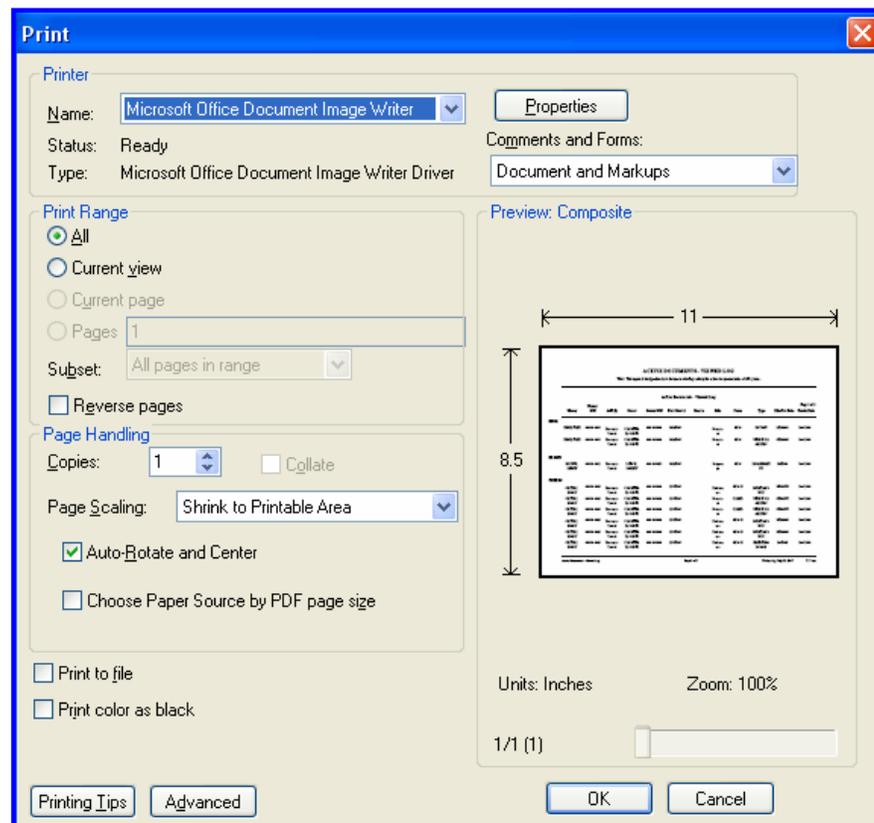


5. Select pages of the report to print, and click the **OK** button.

The report appears as a PDF document.



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



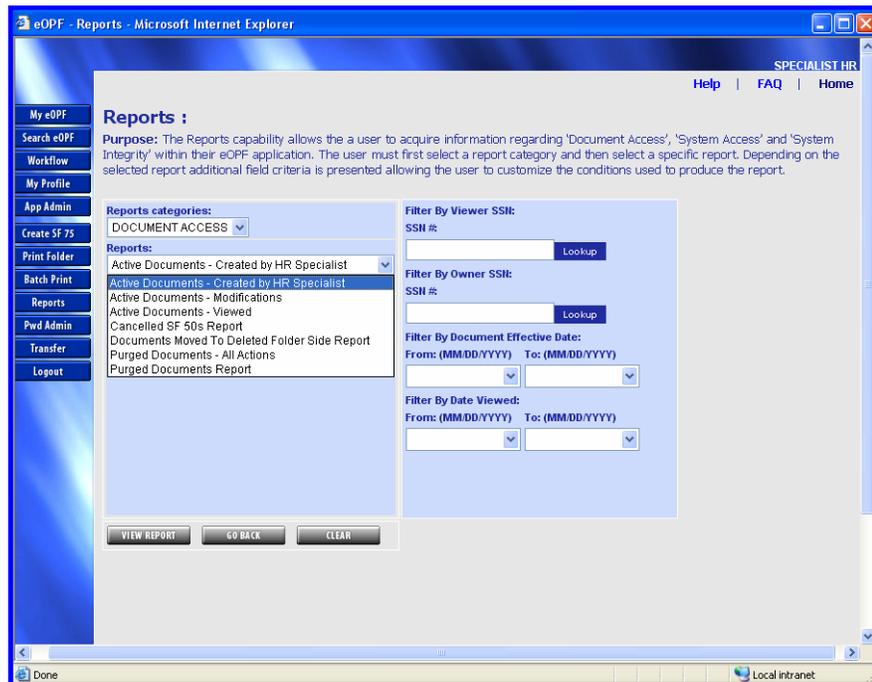
7. Select the desired print parameters and click the **OK** button.

## 7.2 Exporting Reports And Logs

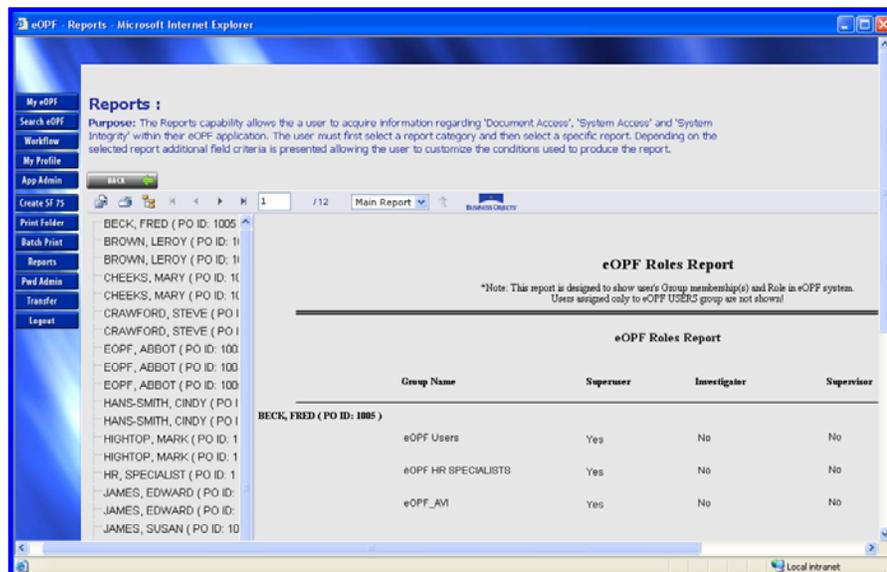
The eOPF system allows HR specialists and eOPF administrators to export reports and logs. The procedure is the same for viewing all of the reports.

### To export reports and logs:

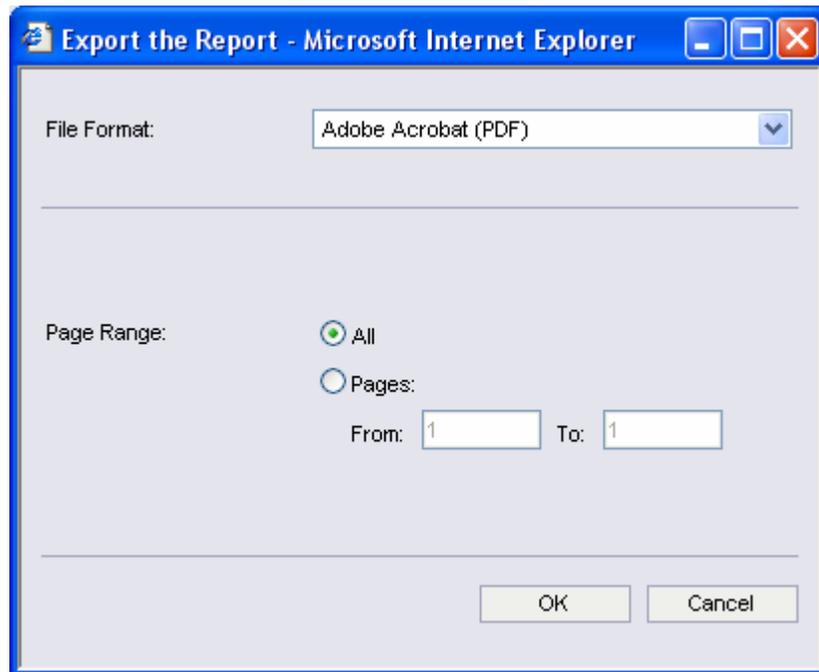
1. From the eOPF main menu, click the **Reports** button.  
The **Reports** page appears.



2. Select the **Report categories**, the desired **Reports**, and input report filters.
3. Click the **View Report**  button. The report appears.



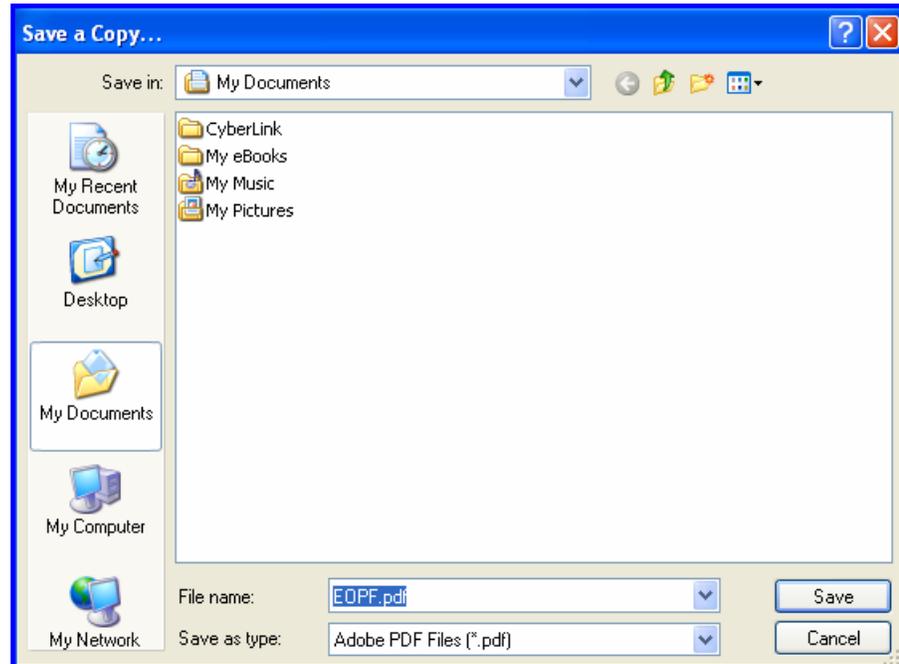
4. Click the **Export**  button displayed above the report. The **Export the Report** box appears.

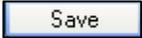


5. Select the report **File Format**, and click the **OK** button.  
The report appears in the selected format.

| Group Name                       | Superuser | Investigator | Supervisor |
|----------------------------------|-----------|--------------|------------|
| <b>BECK, FRED ( PO ID: 1005)</b> |           |              |            |
| eOPF Users                       | Yes       | No           | No         |
| eOPF HR SPECIALISTS              | Yes       | No           | No         |
| eOPF_AVI                         | Yes       | No           | No         |
| <b>BROWN, LEROY ( PO ID: 1)</b>  |           |              |            |
| eOPF Users                       | Yes       | No           | No         |
| eOPF HR SPECIALISTS              | Yes       | No           | No         |
| eOPF_AVI                         | Yes       | No           | No         |
| <b>BROWN, LEROY ( PO ID: 1)</b>  |           |              |            |
| eOPF Users                       | Yes       | No           | No         |
| eOPF HR SPECIALISTS              | Yes       | No           | No         |

6. Click on **Save** or **Save a Copy**, depending on the file format selected.  
The **Save As** pop-up box appears.



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





## Chapter 8: Transfer Administration

The eOPF system allows HR specialists with Transfer Capability to electronically transfer an employee's OPF to another eOPF participating agency.

When transferring an OPF, eOPF pre-selects required transfer documents and allows the Losing Agency HR specialist to add additional documents necessary to complete the transfer. If a required document was missed or additional documents arrive at the Losing Agency after the transfer, the Losing Agency can transfer additional documents to the Gaining Agency.

Documents transferred from the Losing Agency are placed in the Transferred folder side at the Losing Agency. Once the transfer is confirmed by the Gaining Agency, the Losing Agency employee folder becomes inaccessible by the employee, who should begin viewing his or her eOPF using the Gaining Agency repository. Once the transfer is complete, the Losing Agency must print a transfer receipt to maintain a record of the transfer and purge the folder.

Currently, there are six potential transfer scenarios:

1. Gaining Agency (non-eOPF), Losing Agency (eOPF).
2. Gaining Agency (eOPF), Losing Agency (non-eOPF).
3. Gaining Agency (eOPF), Losing Agency (eOPF).
4. Losing Agency (eOPF), Gaining Agency (NPRC).
5. Gaining Agency (eOPF), Losing Agency (NPRC).
6. Gaining Agency (eOPF), Losing Agency (NPRC w/ Paper Reinstatement).

This manual covers the most common scenario where both the Gaining Agency and Losing Agency use eOPF.

---

### **Note:**

Before initiating a transfer, the Gaining Agency must have a folder created either through the Gaining Agency's employee feed into eOPF, or it must be created manually by an administrator.

---



## 8.1 Gaining Agency Creates SF 75 Part 1

To create Part 1 of the SF 75:

1. From the eOPF main menu, click the **Transfer**

 button.

The **Requested Transfers – Open Transfers** page displays by default.

2. Click the **New Transfer**  tab at the top of the page.

The **New Transfer – Request a Transfer** page opens.



3. Click the **New Transfer – Create SF 75** tab.

4. Enter the SSN of the employee that will be transferred and click the **Submit** button. The employee's **Name** and **SSN** will appear or a message displays **"You do not have access to this OPF. Contact your eOPF administrator."**



5. Select the appropriate **Folder Side** and **Eff Date** (Effective Onboard Date).
6. Click the **Create SF 75**  button.
7. Complete Part 1 and click the **Back To eOPF**  button.
8. Click the **Insert**  button to electronically store the employee's SF 75 data.  
A confirmation appears stating that the SF 75 was created successfully.
9. Click the **New Transfer – Request a Transfer** tab.

10. Select the appropriate information from the agency you are requesting the transfer:
  - From the **Select an Agency** drop-down list.
  - Enter the **Employee SSN #** and click the **Search**  button to confirm the employee name.
  - Select SF 75 from the **Transfer Type** drop-down list.



**Transfer - Request a Transfer :**

Select an Agency: Office of Personnel Management

Employee SSN #: 555-44-3333

Name: TEST, TRANSFER

Transfer Type: SF75

| Form  | Send                     | View Doc | Modify Index | Create Date         | Eff Date | NOA Code | Folder Side |
|-------|--------------------------|----------|--------------|---------------------|----------|----------|-------------|
| SF 75 | <input type="checkbox"/> |          |              | 4/5/2007 2:28:21 PM | 4/1/2007 |          | Temporary   |

11. Click the **Submit**  button to submit the SF 75 request.
12. Select the **Send** checkbox next to the SF 75 document you created earlier in this process, and click the **Request**  button to transfer the document. A confirmation pop-up box appears.
13. Click the **OK**  button to confirm the transfer request.  
A confirmation page displays the following message "**Action has been initiated on Transfer Service.**", click **OK**.

## 8.2 Losing Agency Completes The SF 75

To complete SF 75:

1. From the eOPF main menu, click the **Transfer**  button.  
The **Requested Transfers – Open Transfers** page displays by default.



2. Select the appropriate information the employee will be transferring to:
  - From the **Select an Agency** drop-down list.
  - Enter at least one other criteria such as **Employee SSN #, Last Name, and Activity On/After**.
  - Select SF 75 from the **Transfer Type** drop-down list.
3. Click the **Submit**  button.

| Name | Transfer | Deny | SSN | Gaining Agency | Transfer Type | Activity Date | Status |
| --- | --- | --- | --- | --- | --- | --- | --- |
| TEST, TRANSFER |  |  | 555-44-3333 | USCG | SF75 | 4/17/2007 5:09:59 PM | REQUESTED |

4. Click the **Transfer**  icon to continue the transfer or click the **Deny**  icon to deny the transfer.



Requested Transfers - Open Transfers    Requested Transfers - Create SF 75    Requested Transfers - Create SF 127

### Transfer - Open Transfers :

Select an Agency: United States Coast Guard

Employee SSN #:

Last Name:

Activity On/After:

Transfer Type: SF75

| Form  | Transfer                 | View Doc | Modify Index | Complete SF75 | SSN         | Create Date          | Eff Date | NOA Code | Folder Side |
|-------|--------------------------|----------|--------------|---------------|-------------|----------------------|----------|----------|-------------|
| SF 75 | <input type="checkbox"/> |          |              |               | 555-44-3333 | 4/17/2007 5:06:11 PM | 4/1/2007 |          | Temporary   |

5. Click the **View Doc** icon to view Part 1 of the SF 75 and click the **Complete SF 75** icon to complete parts 2, 3 and 4 of the SF 75.

### Complete SF 75

Enter SSN #:

**Name:**

**SSN:**

**Form:** SF 75

**Type:** EMPLOYEE

**Folder Side:**

Temporary     Performance     Training     Cancellation

Permanent     Overseas     Deleted     Transferred

**Eff Date:**

6. Enter the SSN of the employee that will be transferred and click the **Submit** button.
7. Select the appropriate **Folder Side** and **Eff Date** (Effective Onboard Date).

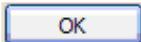


8. Complete part 2, 3, and 4, and click the **Back To eOPF**  button.

9. Click the **Insert**  button to insert the updated SF 75 into the employee folder. A confirmation appears stating that the SF 75 was created successfully.

| Requested Transfers   | New Transfer             | Reprocess / Transfer               | History-Sent | History-Requested | Send To NPRC                        | Received Transfers  | Transfers Out |          |             |
|---|--------------------------|------------------------------------|--------------|-------------------|-------------------------------------|---------------------|---------------|----------|-------------|
| Requested Transfers - Open Transfers  |                          | Requested Transfers - Create SF 75 |              |                   | Requested Transfers - Create SF 127 |                     |               |          |             |
| <b>Transfer - Open Transfers :</b>  |                          |                                    |              |                   |                                     |                     |               |          |             |
| Select an Agency: United States Coast Guard   |                          |                                    |              |                   |                                     |                     |               |          |             |
| Employee SSN #: 222-22-0003   |                          |                                    |              |                   |                                     |                     |               |          |             |
| Last Name:  |                          |                                    |              |                   |                                     |                     |               |          |             |
| Activity On/After:  |                          |                                    |              |                   |                                     |                     |               |          |             |
| Transfer Type: SF75   |                          |                                    |              |                   |                                     |                     |               |          |             |
| <input type="button" value="SUBMIT"/> <input type="button" value="CLEAR"/>  |                          |                                    |              |                   |                                     |                     |               |          |             |
| <input type="button" value="CHECK ALL"/> <input type="button" value="UNCHECK ALL"/> <input type="button" value="TRANSFER"/> <input type="button" value="CANCEL"/> |                          |                                    |              |                   |                                     |                     |               |          |             |
| Form  | Transfer                 | View Doc                           | Modify Index | Complete SF75     | SSN                                 | Create Date         | Eff Date      | NOA Code | Folder Side |
| SF 75   | <input type="checkbox"/> |                                    |              |                   | 222-22-0003                         | 5/2/2007 3:32:57 PM | 5/1/2007      |          | Temporary   |
| SF 75   | <input type="checkbox"/> |                                    |              |                   | 222-22-0003                         | 5/2/2007 3:36:29 PM | 5/1/2007      |          | Temporary   |

10. Select the **Transfer** checkbox next to the SF 75 with the most recent **Create Date** (the SF 75 updated with parts 2, 3, and 4), and click the **Transfer**  button. A confirmation pop-up box appears.

11. Click the **OK**  button to confirm the transfer request. A confirmation page displays the following message **“Action has been initiated on Transfer Service.”**, click **OK**.



## 8.3 Gaining Agency Receives Completed SF 75

To receive completed SF 75:

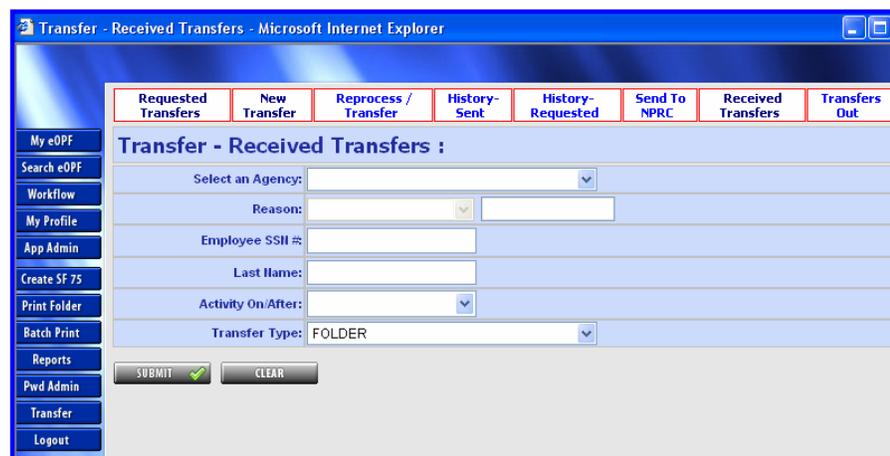
1. From the eOPF main menu, click the **Transfer**

 button.

The **Requested Transfers – Open Transfers** page displays by default.

2. Click the **Received Transfers**  tab at the top of the page.

The **Transfer – Received Transfers** page opens.



3. Select the appropriate information the employee will be transferring to:

- From the **Select an Agency** drop-down list.
- Enter at least one other criteria such as **Employee SSN #, Last Name, and Activity On/After**.
- Select SF 75 from the **Transfer Type** drop-down list.

4. Click the **Submit**  button.



| Requested Transfers  | New Transfer             | Reprocess / Transfer | History-Sent | History-Requested | Send To NPRC    | Received Transfers | Transfers Out       |           |
|--|--------------------------|----------------------|--------------|-------------------|-----------------|--------------------|---------------------|-----------|
| <b>Transfer - Received Transfers :</b>   |                          |                      |              |                   |                 |                    |                     |           |
| Select an Agency: Office of Personnel Management   |                          |                      |              |                   |                 |                    |                     |           |
| Reason: <input type="text"/>   |                          |                      |              |                   |                 |                    |                     |           |
| Employee SSN #: 222-22-0003  |                          |                      |              |                   |                 |                    |                     |           |
| Last Name: <input type="text"/>  |                          |                      |              |                   |                 |                    |                     |           |
| Activity On/After: <input type="text"/>  |                          |                      |              |                   |                 |                    |                     |           |
| Transfer Type: SF75  |                          |                      |              |                   |                 |                    |                     |           |
| <input type="button" value="SUBMIT"/> <input type="button" value="CLEAR"/>   |                          |                      |              |                   |                 |                    |                     |           |
| <input type="button" value="CHECK ALL"/> <input type="button" value="UNCHECK ALL"/> <input type="button" value="ACKNOWLEDGE"/> <input type="button" value="CANCEL"/> |                          |                      |              |                   |                 |                    |                     |           |
| Name   | Send                     | Ack.                 | SSN          | Losing Agency     | Transfer Status | Activity           | Activity Date       | Doc Count |
| THREE, SCENARIO  | <input type="checkbox"/> |                      | 222-22-0003  | OPM               | DELIVERED       | DOCUMENTS RECEIVED | 5/2/2007 3:43:13 PM | 1         |

- The SF 75 is now located in the employee folder. Review the SF 75 and click the **Ack.** icon to acknowledge the SF 75 transfer and continue. A confirmation page displays the following message **“Action has been initiated on Transfer Service.”**, click **OK**.

## 8.4 After The Completed SF 75 Is Received

Due to the necessary requirements involved in the transfer process between the Gaining Agency and the Losing Agency, we will cover the remaining steps with a summarization.

After the Gaining Agency receives a completed SF 75, the following steps need to take place:

- Gaining Agency receives the completed SF 75 and uses it to create a record in the HRIS system projecting the EOD date. The employee starts, which establishes the EOD date.
- At the next pay cycle, a new EDF record and pick-up SF 50 are generated for the Gaining Agency, and are transmitted to eOPF and loaded. The pick-up SF 50 and folder request to transfer must be sent to the Losing Agency.



3. Losing Agency receives the transfer request and transfers the selected documents to the Gaining Agency.
4. Losing Agency executes the eOPF transfer. All permanent documents are automatically transferred and placed on the Transferred folder side. The documents still exist in the system, but are no longer accessible, except by users that have access to the Transferred folder side. The employee's folder status will be "Transfer Delivered", which is no longer accessible by the employee or supervisor.
5. Gaining Agency confirms the correct number of documents is received and the form numbers match the agency forms list. Those not matching are marked as "Other".
6. Gaining Agency acknowledges that the documents are received and transmits a confirmation receipt.
7. Losing Agency receives the transfer complete notice from the Gaining Agency, verifies the number of transferred documents, archives the SF 75 and pick-up SF 50, then stores the transfer complete notifications in paper form in a separate location. The eOPF account status automatically changes to "Transfer Confirmed", at which time the Losing Agency must purge all documents from the employee's folder.





## Glossary Of Terms

| TERM                 | DEFINITION  |
|----------------------|---|
| <b>Add Clip</b>      | An icon used to add documents to a paper clip that was previously assigned to a folder.                               |
| <b>Administrator</b> | Users with special access to setup, modify, and delete eOPF system parameters.  |
| <b>Annotation</b>    | Notes added to an employee's eOPF document.   |
| <b>Folder</b>        | A container for documents.  |
| <b>Modify</b>        | A function that allows a user to add or delete pages to a document.   |
| <b>Modify Index</b>  | A function used to alter the indexing of a document within a folder.  |
| <b>Clip Folder</b>   | Logical grouping of documents within a folder.  |
| <b>View Doc</b>      | Icon  used to view eOPF documents. |





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