



**UNITED STATES DEPARTMENT OF THE INTERIOR**  
**BUREAU OF INDIAN EDUCATION**  
HUMAN RESOURCES OFFICE  
1011 Indian School Road, Suite 150  
Albuquerque, New Mexico 87104

Memorandum

Date: June 5<sup>th</sup>, 2017

To: Associate Deputy Director  
All Education Line Officers  
Attn: School Principals, Business Technicians & Business Managers

From: Anna D. Smith, Human Resources Officer - BIE *Anna D. Smith*

Subject: eOPF Import Functionality Role for 2017/2018 Contract Renewal Season

We are eager to announce that we are implementing the Import function within the electronic Official Personnel Folder or eOPF system for 2017/2018 contract renewal season. We anticipate that this new access for Business Technicians and Business Managers will help reduce costs, prevent backlog of eOPF scanning, and streamline the paperwork process.

The Import function has been available for approximately two years in eOPF and can be assigned to non-Human Resources personnel, allowing them to upload PDF documents into an employee's eOPF. The Import role does NOT allow the Importer to access the employee's full eOPF. The Human Resources Office in Albuquerque, NM (HRO-ABQ) will assign Import role access to the Business Technicians and Business Managers to become effective June 6, 2017. This access will be restricted to the Importer's specific school location and will expire September 30, 2017.

The Import role access will require Business Technicians and Business Managers to affirm that they have the following:

- Active access to eOPF
- Adobe Acrobat Reader
- Copier or printer that can scan documents into PDF files (identify if can scan in color)
- Secured drive or folder location for the PDF files (temporary storage)

With the Import role access, Business Technicians and Business Managers can scan contract renewal documents and upload them directly to an employee's eOPF. We hope that this will reduce cost of mailing for the school locations and prevent adding to the current backlog of scanning within HRO-ABQ. We recognize the new process will also require the hard copy originals be retained in the employee's unofficial OPF in a secured location within the Business Technician/Manager's office.

The implementation of the Import role access also requires the Recruitment and Placement (R&P) team within HRO-ABQ to include a quality control review of documents uploaded by the Business Technicians and Business Managers. The primary focus of the review is to ensure items are properly uploaded and indexed within eOPF. The R&P team will also identify missing or incomplete items and utilize the renewal documents to prepare review sheets to validate data entered in the Federal Personnel/Payroll System (FPPS) for contract renewal.

The following documents have been identified for uploading into eOPF as part of the 2017/2018 contract renewal process:

- Year-long or School-year contract for 2017/2018
- Performance appraisal for 2016/2017
- Licensure or Certification required for position including Food Handler's Certificate

The following documents are still required as hard copy originals to be submitted to HRO-ABQ:

- Pay Determination Sheet
- Official Transcripts
- Copy of Commercial Driver's License (CDL)
- Staffing Differential Forms
- Supervisory Agreements and Computation Sheets
- Salary pro-ration form
- Stipend Forms
- SF-78, Certificate of Medical Examination (or equivalent)

We understand that this process change requires an adjustment to current practices and will require technical assistance for using the new Import function, thus we are providing webcast training for the Import function. We have attached the webcast schedule, the appropriate section from the eOPF User Guide as a job aid, and listing of documents with appropriate form number and indexing label.

For technical assistance with the Import function, please contact your servicing HR Specialist on the R&P team.

Attachments

## Webcast Schedule: eOPF Import Function

Date	Time	Link
06/09/17	10am	<p><b>eOPF-Import - Fri, Jun 9, 2017 10:00 AM - 11:00 AM MDT</b></p> <p><b>Please join my meeting from your computer, tablet or smartphone.</b>  <a href="https://global.gotomeeting.com/join/505633925">https://global.gotomeeting.com/join/505633925</a></p> <p><b>This meeting is locked with a password : Education!123</b></p> <p><b>You can also dial in using your phone.</b>            United States: +1 (872) 240-3311</p> <p><b>Access Code: 505-633-925</b></p>
06/09/17	2pm	<p><b>eOPF-Import -Fri, Jun 9, 2017 3:00 PM - 4:00 PM MDT</b></p> <p><b>Please join my meeting from your computer, tablet or smartphone.</b>  <a href="https://global.gotomeeting.com/join/840338069">https://global.gotomeeting.com/join/840338069</a></p> <p><b>This meeting is locked with a password : Education!123</b></p> <p><b>You can also dial in using your phone.</b>            United States: +1 (571) 317-3122</p> <p><b>Access Code: 840-338-069</b></p>
06/16/17	10am	<p><b>eOPF-Import -Fri, Jun 16, 2017 10:00 AM - 11:00 AM MDT</b></p> <p><b>Please join my meeting from your computer, tablet or smartphone.</b>  <a href="https://global.gotomeeting.com/join/902438093">https://global.gotomeeting.com/join/902438093</a></p> <p><b>This meeting is locked with a password : Education!123</b></p> <p><b>You can also dial in using your phone.</b>            United States: +1 (646) 749-3112</p> <p><b>Access Code: 902-438-093</b></p>
06/16/17	2pm	<p><b>eOPF-Import -Fri, Jun 16, 2017 3:00 PM - 4:00 PM MDT</b></p> <p><b>Please join my meeting from your computer, tablet or smartphone.</b>  <a href="https://global.gotomeeting.com/join/535845765">https://global.gotomeeting.com/join/535845765</a></p> <p><b>This meeting is locked with a password : Education!123</b></p> <p><b>You can also dial in using your phone.</b>            United States: +1 (872) 240-3212</p> <p><b>Access Code: 535-845-765</b></p>

## Document Indexing

eOPF recommends scanning documents directly to an Adobe PDF format file using the following scanner settings:

- 300 DPI resolution
- Black/White

\*Import function cannot open and upload PDF files which are password protected

<b>Form #</b>	<b>Effective Date</b>	<b>Type</b>	<b>Folder Side</b>	<b>Remarks</b>
BIA 6232A – School Year Contract	Contract begin date	Personnel Action/Support Doc	Permanent	Employees on Educ Pay Scale
BIA 6232B – Teacher/Counselor/Employment Contract, School Year Contract	Contract begin date	Personnel Action/Support Doc	Permanent	
BIA 6232D – Year Long Contract	Contract begin date	Personnel Action/Support Doc	Permanent	
BIE 06 – Pay Determination Form (Teachers/Counselors/Homeliving Specialists)	Contract begin date	Employee	Temporary	
BIE 07 – Pay Determination (CY/CE employees)	Contract begin date	Employee	Temporary	
BIE 6232AD – Amendment to School Year Contract	Contract begin date	Personnel Action/Support Doc	Permanent	
DG05 – Copy of School Transcript	Contract begin date	Employee	Permanent	Official copies only (preferably in color and both sides of transcript)
DG42 – License/Certification required in qualifications for position	Contract begin date	Employee	Permanent	Includes Food Handler Certificates
DI 3100 – Employee Performance Appraisal Plan	Last day of prior contract year	Performance	Performance	
DI 3100S – Supervisory Employee Performance Appraisal Plan	Last day of prior contract year	Performance	Performance	


## Scanned Documents

eOPF recommends scanning documents directly to an Adobe PDF format file using the following scanner settings:

- 300 DPI resolution
- Black/White

Also, the *eOPF Import* function cannot open and upload PDF files which are password protected.

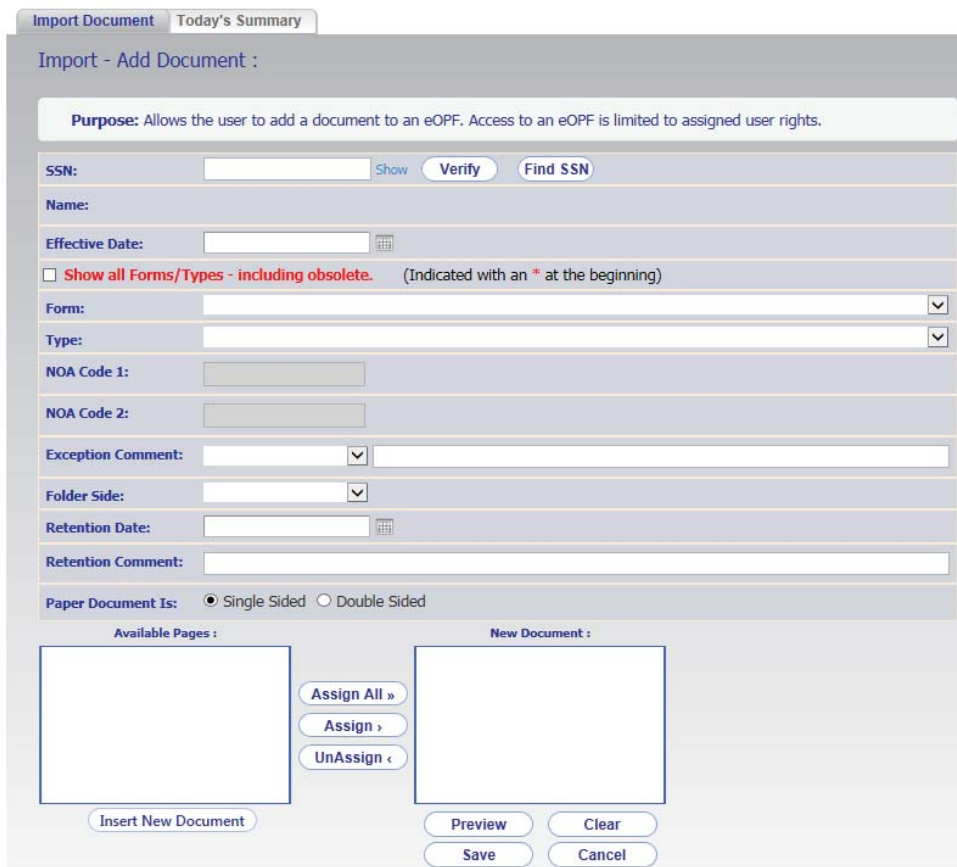
## Importing Document (Importer Role)

An importer is an employee who only import documents into eOPF and does not have the need to search for and review folders/documents. Once the account is established for this user, the  *Import* button will be available to him or her on the main menu.


### To Import a New Document (Importer Role):

1. Click the  *Import* main menu button to display the *Import – Add Document Page*.

The following figure displays the *Import – Add Document* page.



2. In the **SSN** field, enter the **SSN** for the eOPF you would like to import into.

Click the  *Verify* button to verify your access to that eOPF. If successful, the name on the eOPF appears next to the *Name* label.


3. In the **Effective Date** field, select the appropriate date from the calendar.
4. From the **Form** drop-down list, select the appropriate **Form Name**.  
If you need an obsolete form, then check the *Show All Forms/Types* checkbox to list all forms including obsolete forms. Administrators can identify obsolete forms using the *App Admin -> Forms* module.
5. From the **Type** drop-down list, select the appropriate **Form Type**.  
The NOA Code value is automatically filled in based on Type selected if that Form/Type combination has an assigned default folder side.

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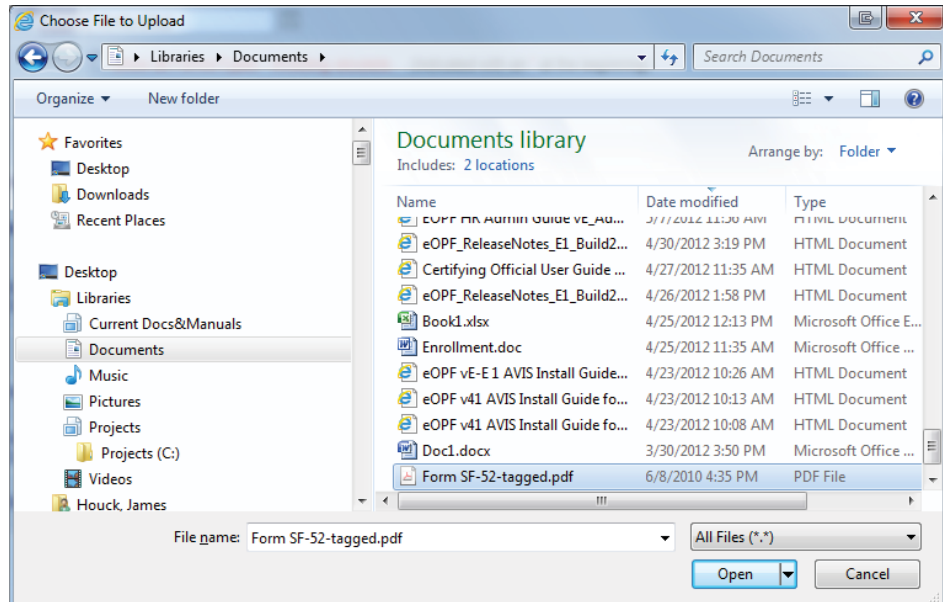
**Note:**

The *NOA Code 2* field is only available if the *NOA Code 1* field has been populated with a value.

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6. If the document should have an exception comment, select a comment from the **Exception Comment** drop-down list.  
To enter additional custom comments, use the textbox to the right of the *Exception Comment* drop-down list.
7. From the **Folder Side** drop-down list, select the folder side in which the document resides.  
The folder side for the given form/type combination is selected by default. Some form/type combinations can only be saved to this default folder side.
8. If the document has a retention date, enter the date the document is to expire and any **Retention** audit comments into the supplied **Retention** fields.  
When a document reaches its assigned retention date it is moved to the *Deleted* folder side of that eOPF. At that point an email notification is sent to the PO ID administrator assigned to that folder so the HR Specialist can either purge or re-index the document as needed.
9. If the document being inserted is originally double-sided, select the **Double-Sided** option under **Paper Document Is**.  
By default, the newly uploaded document is considered single-sided.
10. Click the  **Insert New Document** button.  
The *Choose File to Upload* dialog box appears.

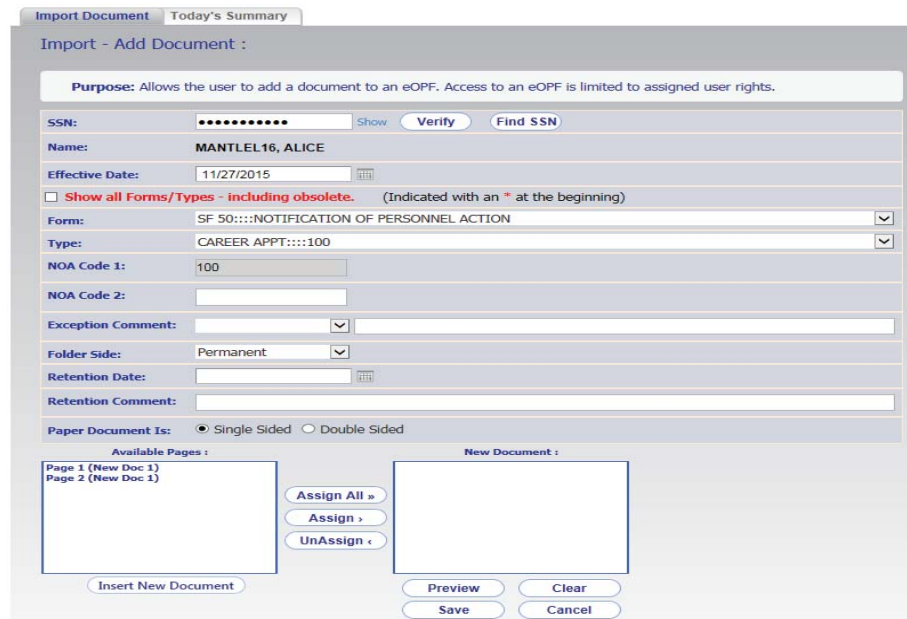
The following figure displays the *Choose File to Upload* dialog box.



11. Select the desired file and then click the  **Open** button.

The page reappears with the file's available pages in the *Available Pages* box.

The following figure displays the *Import – Add Document* page.





**12. The browser prompts you to view the selected file.**

This is to allow you to view the file in use to confirm it is the intended file.

**13. Choose which pages should be included in the new eOPF document.**

You can select certain pages to be added to the new eOPF document by selecting the desired page and clicking the **Assign >** *Assign* button. You can also use the **Assign All >>** *Assign All* button to add all available pages to the new eOPF document. Any pages assigned to the *New Document* box no longer appears in the *Available Pages* box. You can also re-order pages if necessary by assigning individual pages in the preferred order. To un-assign a certain page select the desired page from the *New Document* box and click the **UnAssign <** *Unassign* button.

The following figure displays the *Import – Add Document* page.

14. To preview the new eOPF document based on the current assigned pages, click the **Preview** *Preview* button.

To clear the *New Document* box of all assigned pages and return all pages to the *Available Pages* box, click the **Clear** *Clear* button.

15. To save the new document, click the **Save** *Save* button. A prompt appears for the user to verify the indexing information before saving.

The following figure displays the *Verify Information* page.

Verify Information :	
SSN:	..... Show
Name:	MANTLEL16, ALICE
Effective Date:	11/27/2015
Form:	SF 50:::NOTIFICATION OF PERSONNEL ACTION
Type:	CAREER APPT:::100
NOA Code 1:	100
NOA Code 2:	
Exception Comment:	
Folder Side:	Permanent
Retention Date:	
Retention Comment:	
Paper Document Is:	Single Sided

16. Once you have verified the index information, click the **OK** *OK* button.

A confirmation message appears to show the document was successfully added into eOPF.

The following figure displays the document added confirmation message.

Document added successfully.

**Continue Importing with the Same Employee**      **Continue Importing with a Different Employee**

**Done**

17. To continue adding more documents to the same eOPF,


click the  **Continue Importing with the Same Employee** button.

The indexing information remains to allow for quicker loading of related documents. The *Available Pages* and *New Document* boxes are cleared to allow for loading the next document.

-OR-

To continue adding the same type of document to a

different eOPF, click the  **Continue Importing with a Different Employee** button.

The indexing information remains however the SSN/Name fields are cleared to allow for importing into a different eOPF. To exit the *Import - Add Document* page and return to the eOPF search results, click the  **Done** button.

## Today's Summary (Importer Role)

The *Today's Summary* page allows importers to quickly review the documents they have imported today by selecting the

**Import** *Import* button on the main menu. This page also includes documents added through *Add Document* as well as documents created in eOPF using the *Replace* and *Extract* features.

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### Note:

The *Today's Summary* page is cleared nightly at midnight, based on local server time.

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1. Click the **Import** *Import* main menu button to display the *Import – Add Document* page.

The *Import – Add Document* page appears.

The following figure displays the *Import – Add Document* page.

Import Document Today's Summary

Import - Add Document :

**Purpose:** Allows the user to add a document to an eOPF. Access to an eOPF is limited to assigned user rights.

SSN:  Show Verify Find SSN

Name:

Effective Date:

Show all Forms/Types - including obsolete. (Indicated with an \* at the beginning)

Form:

Type:

NOA Code 1:

NOA Code 2:

Exception Comment:

Folder Side:

Retention Date:

Retention Comment:

Paper Document Is:  Single Sided  Double Sided

Available Pages :

New Document :

Assign All > Assign > UnAssign <

Insert New Document Preview Clear Save Cancel

2. Click the **Today's Summary** *Today's Summary* tab at the top to display the *Import – Today's Summary* page.

The following figure displays the *Import – Today's Summary* page.



3. For a printout of *Today's Summary* click the *Printer Friendly version of result list* link and print the page.
4. Click on the *Form Name* link for a document to view that document.