



**eOPF**

**Reference Guide**

**Administrator**



# Administrator Reference Guide

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**IMPORTANT! This reference guide includes screens from eOPF which are representative of what you may see. However, your system may appear slightly different depending upon your role or versioning of the system.**

# Purpose

This document provides guidance for individuals assigned to an Administrator role. The Administrator role allows individuals to manage and create user accounts, view and assign roles for other employees, and run reports. This guide will illustrate how to perform many of these functions and complete tasks related to the Administrator role.

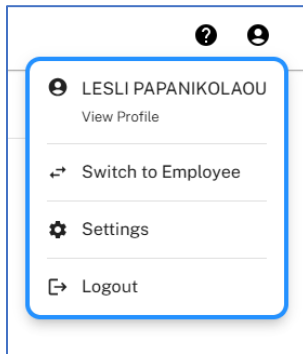
## Introduction to eOPF

See the **eOPF Employee Reference Guide** on the toolkit for guidance on the following features and functionality:

- Logging in to eOPF
- Configuring My Settings
- Contacting the eOPF Help Desk
- Giving Feedback

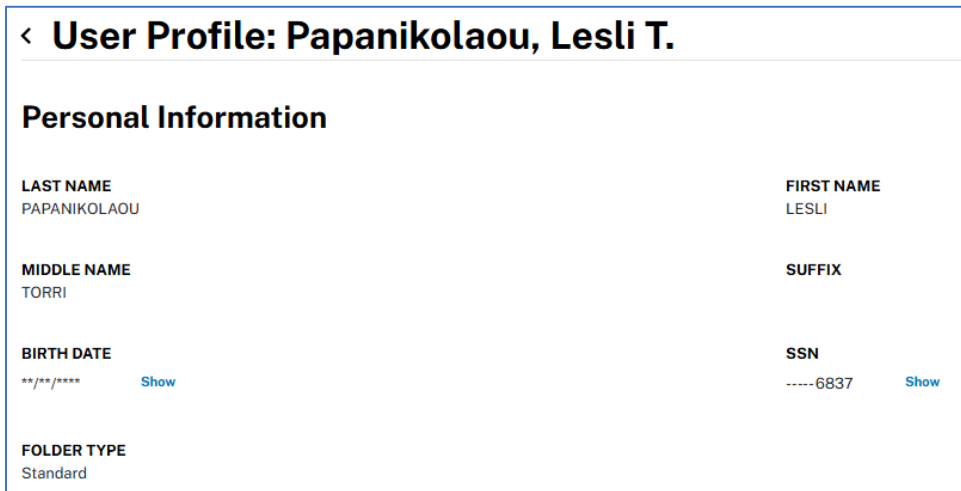
## View Profile

1. To access your Profile, click the profile icon  and select “View Profile” under your name.

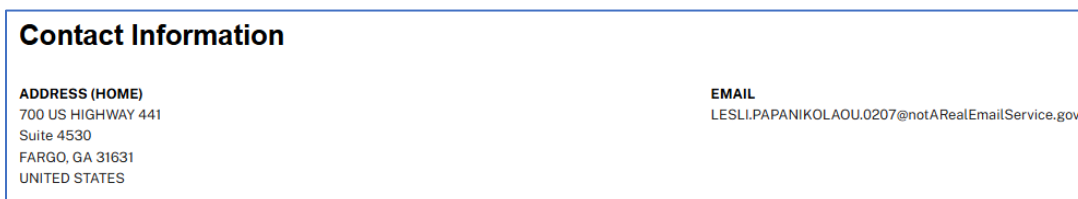


2. The User Profile page is divided into 5 Sections:

a. **Personal Information:** This section contains personal identifying information about the user.



b. **Contact Information:** This section contains the user’s address and e-mail address



- c. **Employment Account Information:** This section contains information about the user’s employments. If a user has multiple or dual employments, they will all show here. As an employee moves from agency to agency, the employment history will be logged in this table.

**Employment Account Information**

Select	EMPLOYMENT ID	AGENCY	AGENCY SUBELEMENT	POID	ORG CODE	ACTIVITY CODE	ACCOUNT TYPE	START DATE	END DATE	ELEVATED PERMISSION	FOLDER STATUS
<input checked="" type="checkbox"/>	790489	VETERANS HEA...	VATA	1782	VATA89905603	CHOLCO...	Employee	2025-01-29		Yes	ACTIVE

Rows per page: 10 1-1 of 1 < >

**ACCOUNT STATUS**  
Active

- d. **Role and Access:** This section contains the user’s assigned Role and Access Rights in the system.

**Role and Access:**

**ROLE**  
[Investigator](#)

POID	AGENCY SUBELEMENT	ORG CODE	ACTIVITY CODE	SSN	EFFECTIVE FROM	EFFECTIVE TO	EXCLUDED
1782	VATA				2025-01-30		false

Rows per page: 10 1-1 of 1 < >


- e. **User Activity:** This section contains information about the user’s login activity

**User Activity**

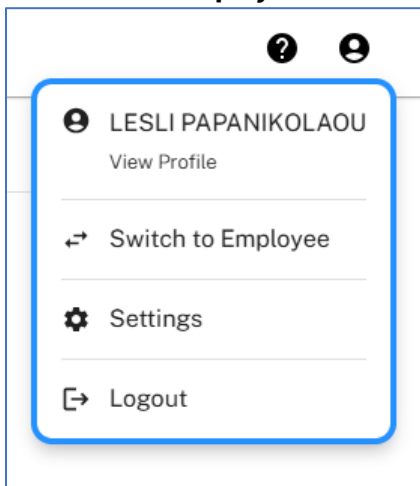
**TOTAL LOGIN COUNT**  
20


Note: You will not be able to update any information in your own profile. If there are any changes needed to your personal and contact information, please contact your HR System of Record. For changes to your employment or Access, please contact your HR Admin or Agency POC.

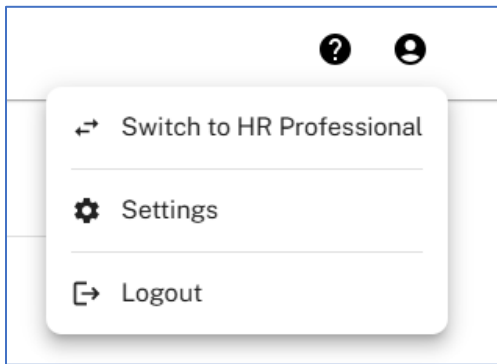
## Toggle to Employee View

1. Logging in will automatically take you to HR Professional view. Aside from Contractors, all users with access to HR Professional view will have to ability to toggle to Employee View to view their own employee documents. To access Employee View, click the profile icon  and select “Switch to Employee”.

See the **eOPF Employee Reference Guide** in the toolkit for guidance on the Employee view:



2. To switch back to HR Professional view, click the profile icon  and select "Switch to HR Professional"

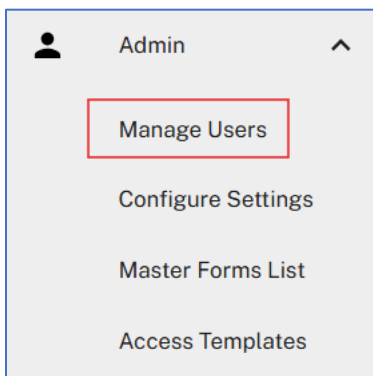


## Manage Users

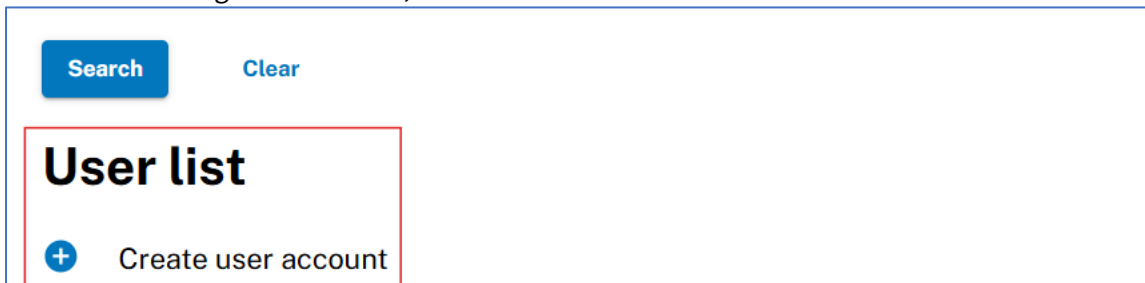
The following sections cover various user management functions available to Admins in eOPF.

### Create new user accounts

1. In order to create a new user, first navigate to the left navigation menu and select the Admin dropdown and then select "**Manage users**"



2. Once in the Manage Users screen, select the "Create user account" button under the "User list" grid header.



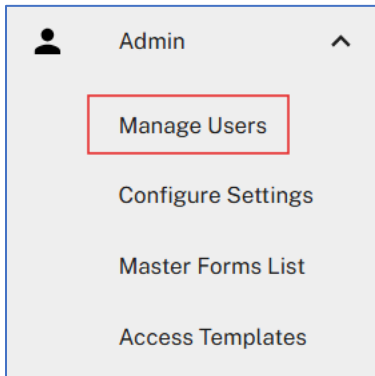
3. Fill out all required fields and then, once complete, select "Create Account" at the bottom of the screen.
  - a. *Note: If, when selecting the folder type, you select either the Merged or Foreign folder type the folder cannot be changed back to a Standard folder type.*
    - i. *Additionally, the "End date" field is optional but highly recommended if you know the window for which eOPF access is needed for the user being created.*
4. Lastly, confirm all the information on the following confirmation screen is correct with the account you wish to create. If all information is correct selected the "Finish" button at the bottom of the screen to finalize the account creation.



5. During account creation, if “Elevated permissions” was set to “No” the process ends here. If it was set to “Yes”, a Role and Access must be assigned to the user. See the next section for how to assign Role and Access.

## Configure new user accounts and employments

1. In order to configure a new user account or employment, first navigate to the left navigation menu and select the Admin dropdown and then select “**Manage users**”



2. In the next Manage Users screen, use the search fields provided to locate the user you wish to configure and select “Search”. Alternatively, new incoming accounts will appear by default at the top of the User list with the Role “Pending assignment”.

### Manage Users

SSN  Employee ID

Last Name  First Name

POID  ORG CODE  ACTIVITY CODE  Agency Subelement

3. Upon selecting “Search”, if there are any results which match your criteria, they will appear below the search criteria section. Locate the user you which to configure and select the row by double clicking on the user.

### User list

+ Create user account

1 results returned of 1

LAST NAME	FIRST NAME, MI	SSN	POID	ORG CODE	AGENCY SUBELEM...	ROLE	TASK STATUS
User	Test	***-**-1112	1000	AG1111020000040...	AG11	Pending Assignment	-

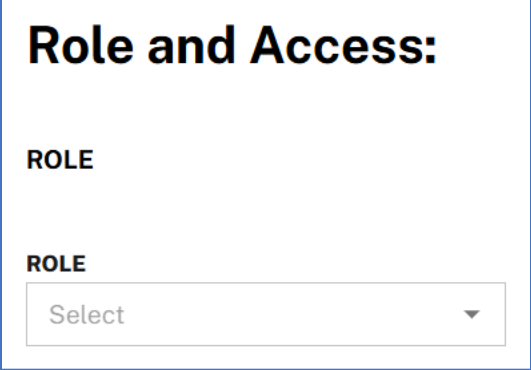
Rows per page: 10 1-1 of 1 < >

4. To configure the user’s Role and Access, navigate down the user’s profile page to the Role and Access section and select “Edit” within that section.



5. You may then select the user’s role within the system from the “Role” dropdown, once a role is selected it is required to assign the user at least one line of Access Rights.

a. *Note: When assigning a role, you will only see options that are your role level or below.*



See below for a brief explanation of each role.

- i. HR Admin Role:
  - All HR Transfer Privileges
  - Search and view user profiles
  - Edit user profile information
  - Create user accounts
  - Configure Role and Access for other employees
  - Reports
  - Purge documents
- 1. HR Transfer Role:
  - All HR Document Management Permissions
  - Request and respond to transfers (Agency and NPRC)
  - Send folders to NPRC
- 2. HR Document Management Role:

- All HR Viewer Permissions
  - Add a document
  - Modify Document
    - Reindex, Insert pages, Reorder pages, Replace document, Extract document
  - Delete documents
  - Restore documents
  - Reports
3. HR Viewer Role:
- Search folders
  - View documents
  - Print and download documents
4. Investigator Role:
- Search Users
  - Search folders
  - View documents
  - Print and download documents
5. Importer Role:
- Search folders
  - Add documents
  - View Today's summary
6. Help Desk Lead Role
- All Help Desk User Permissions
  - Search folders
  - View documents
7. Help Desk User Role
- Search and view user profiles
  - Registration code resets
3. After selecting a role for the user, you will have the ability to assign Access Rights. These access rights will restrict users from interacting with elements and/or datasets for which they are not intended to have access. Be sure to scroll to the right within the access section to view all options.

Available templates

Select Apply Template

---

**Assign Access Rights**

	POID (Required)	Agency subelement (Required)	Org code	Activity code	SSN	Effective from (Required)
1.	Select	Select	Select	Select	----- <input checked="" type="checkbox"/>	04/11/2025

+ Add

Save Cancel

- a. Fill in all “Required” fields. The “Required” fields will differ depending on the Role selected above.
  - i. Note: The effective date will default to the current date but it is recommended to input the correct date if applicable.
  - ii. *Optional:* Selecting the “Excluded” checkbox will work in an inverse manner to the standard Access Rights, prohibiting the user from access to that specific element or dataset. If “Excluded” is selected, at least one of the following fields must be configured or an error will display:
    1. Org code
    2. Activity code
    3. SSN
- b. To add an additional line of Access Rights, press the + Add button and a new blank row will appear at the bottom of the grid.
- c. You may also delete access rights from this same selection screen by scrolling to the right of the access rights row you wish to delete and selecting the “Delete” option

Effective to	Excluded	Delete
MM/DD/YYYY	<input type="checkbox"/>	<input checked="" type="checkbox"/>

- d. If available, Access template(s) will be available to apply. (See [Access Templates](#) for more information)
4. Once you are done assigning the Role and Access, select the “Save”.
5. A confirmation message will display and the Role and Access section on the user profile will be updated with the newly assigned Role and Access.

✔ **The user's information has been successfully updated.**

Note: Changes only apply to eOPF. They must be processed in the HR System of Record or the information will revert back with the next Employee Data Feed.

## Editing a user's account

The following sections all take place on the user profile of the employee the admin wants to edit the information for. Follow steps 1-3 from the [previous section](#) to navigate to the employee profile to edit.

### Updating a user's Personal information:

1. To update the user's personal information, navigate to the Personal Information section and select “**Edit**”.

## Personal Information Edit

<p><b>LAST NAME</b> User</p>	<p><b>FIRST NAME</b> Sample</p>
<p><b>MIDDLE NAME</b></p>	<p><b>SUFFIX</b></p>
<p><b>BIRTH DATE</b> **/**/**** <span style="color: blue; font-size: small;">Show</span></p>	<p><b>SSN</b> -----1112 <span style="color: blue; font-size: small;">Show</span></p>
<p><b>FOLDER TYPE</b> Standard</p>	

2. A new window will open allowing you to update any of the information allowed in the Personal Information section. Once you have completed editing the information, scroll to the bottom of the window and select **“Save”**.
  - a. For more guidance on editing the user’s “Folder type”, see [Editing a user’s folder type](#).

Save

Cancel

1. A confirmation message will display, and the Personal Information section will be updated.

✔ The user's information has been successfully updated.

Note: Changes only apply to eOPF. They must be processed in the HR System of Record or the information will revert back with the next Employee Data Feed.

- b. *Note:* Any changes to a user’s Personal, Contact, or Employment Account information only apply to eOPF. You must make sure the changes are also processed in the HR System of Record or the information will revert back with the next Employee Data Feed.

### Editing a user’s folder type:

1. To update the user’s folder type, navigate to the Personal Information section and select **“Edit”**.

## Personal Information Edit

<p><b>LAST NAME</b> User</p>	<p><b>FIRST NAME</b> Sample</p>
<p><b>MIDDLE NAME</b></p>	<p><b>SUFFIX</b></p>
<p><b>BIRTH DATE</b> **/**/**** <span style="color: blue; font-size: small;">Show</span></p>	<p><b>SSN</b> -----1112 <span style="color: blue; font-size: small;">Show</span></p>
<p><b>FOLDER TYPE</b> Standard</p>	

2. Scroll to the bottom of the popup window and select the desired “Folder type” from the drop down.

MIDDLE NAME (OPTIONAL)

SUFFIX (OPTIONAL)

BIRTH DATE

SSN

FOLDER TYPE

- Standard
- Merged
- Foreign

a. **IMPORTANT NOTE:** Changing a folder type from:

6. Standard to a Merged folder type will prevent the user from **EVER** being changed back to a Standard folder type. This folder type will **ONLY** be able to be changed to a Foreign folder type.
7. Standard to Foreign folder type will prevent the user from **EVER** being changed to **ANY OTHER** folder type. The user will be locked into the Foreign folder type **PERMANENTLY**.
8. Merged to Foreign folder type will prevent the user from **EVER** being changed to **ANY OTHER** folder type. The user will be locked into the Foreign folder type **PERMANENTLY**.

3. Once you have completed changing the folder type, scroll to the bottom of the window and select “**Save**”.

4. Selecting “**Save**” will bring up a secondary popup window confirming the folder type update. If you are sure of the folder type change, select “**Confirm**”.

**Edit Personal Information**

**Update Folder Type**

Once Folder Type is changed to Foreign. It cannot be changed

5. Upon confirming, you will be directed back to the user’s profile and will see a confirmation message at the top of the screen confirming the user’s folder type has been updated.

✓ The user's information has been successfully updated.  
 Note: Changes only apply to eOPF. They must be processed in the HR System of Record or the information will revert back with the next Employee Data Feed.

## Updating user's contact information:

1. To update the user's contact information, navigate to the Contact Information section and select **"Edit"**.

### Contact Information Edit

<b>ADDRESS (HOME)</b> Sample Address  Sample City, VA 99997 United States	<b>EMAIL</b> Sample@sample.com
---	-----------------------------------

2. A new window will open allowing you to update any of the information allowed in the Contact Information section. Once you have completed editing the information, scroll to the bottom of the window and select **"Save"**.

Save Cancel

3. A confirmation message will display, and the Contact Information section will be updated.

✔ The user's information has been successfully updated.  
Note: Changes only apply to eOPF. They must be processed in the HR System of Record or the information will revert back with the next Employee Data Feed.

- a. *Note:* Any changes to a user's Personal, Contact, or Employment Account information only apply to eOPF. You must make sure the changes are also processed in the HR System of Record or the information will revert back with the next Employee Data Feed.

## Editing a user's employment account information

1. To edit a user's employment, navigate down to the Employment Account Information section on the user profile and select **"Edit"**.

### Employment Account Information Edit

2. Make any changes to the available fields. Be sure to scroll to the right within the employment account information section to view all options.

All fields are required unless marked optional.

POID	AGENCY SUBELEMENT	ORG CODE (OPTIONAL)	ACTIVITY CODE (OPTIONAL)	ACCOUNT TYPE	START DATE	END DATE (OPTIONAL)	ELEVATED PERMISSIO
1000 X	AG11 X	AG11110... X	202501... X	Employ... X	04/11/2025	MM/DD/YYYY	No

[+ Add Employment](#)

- a. If you wish to add an additional employment (e.g. if the user has employment at multiple agencies, if the user is transitioning from employee to contractor) you can do so by selecting the [+ Add Employment](#) button below the grid. A new blank row will be added for you to configure.
3. Once you are done making updates to the employment account information updates select the **"Save"** button.
  4. A confirmation message will display, and the Employment Account Information section will be updated.

✓ The user's information has been successfully updated.

Note: Changes only apply to eOPF. They must be processed in the HR System of Record or the information will revert back with the next Employee Data Feed.

- a. Note: Any changes to a user's Personal, Contact, or Employment Account information only apply to eOPF. You must make sure the changes are also processed in the HR System of Record or the information will revert back with the next Employee Data Feed.

## Remove access to HR Professional view

If an employee no longer needs a Role and Access assigned to them, they can have their access to the HR professional view removed so that they can only access the Employee view.

1. Navigate down the user's profile page to the Employment Account Information section and select "Edit".

### Employment Account Information

Edit

2. Locate the "Elevated Permissions" dropdown and select the "No" option. This will remove the user's Role and Access and subsequently their access to the HR Professional view.

### Employment Account Information

All fields are required unless marked optional.

AGENCY SUBELEMENT	POID	ORG CODE (OPTIONAL)	ACTIVITY CODE (OPTIONAL)	ACCOUNT TYPE	ELEVATED PERMISSIONS	START DATE	END DATE (OPTIONAL)	FOLDER STATUS	
0M00	1400	0000	0	Employee	Yes	10/04/2023	mm/dd/yyyy	Active	Save Cancel
					Yes				
					No				

**ACCOUNT STATUS**  
Active

3. Once you are done making updates to the employment account information updates select the "Save" button.
4. A confirmation message will display, and the Employment Account Information section will be updated.

✓ The user's information has been successfully updated.

Note: Changes only apply to eOPF. They must be processed in the HR System of Record or the information will revert back with the next Employee Data Feed.

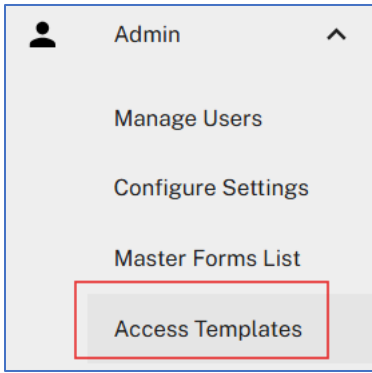
- a. Note: Any changes to a user's Personal, Contact, or Employment Account information only apply to eOPF. You must make sure the changes are also processed in the HR System of Record or the information will revert back with the next Employee Data Feed.

## Access Templates

An access template is a method used to create and assign a set of Access Rights to a user quickly and easily, especially when there are multiple users who will need the same Access Rights within the system. Setting up one (or more) access templates will allow assignment of multiple Access Rights to a user without the need to add individual lines of access for each user.

### Create new template

1. To begin creation of a new Access Template, select the "Access Templates" option from the left navigation menu under the Admin dropdown.



- In the Access Templates screen, select the “Create Template” option



- Input a title and optional description for the template to help easily identify its purpose.

 A screenshot of the 'Create Access Template' form. The title is 'Create Access Template'. Below the title is a note: 'All required fields must be filled out. Lines of Access Rights will be validated one by one.' There are two input fields: 'TEMPLATE NAME (REQUIRED)' with the text 'Sample Template' and 'DESCRIPTION' with the text 'This is to illustrate the method by which a new access template should be created'.

- To add Access Rights, fill out the required fields in the “Add Access Right” section then press “Add to Template”.

 A screenshot of the 'Add Access Right' form. It has several fields: 'Error' (dropdown), 'POID (Required)' (dropdown), 'Agency subelement (Required)' (dropdown), 'Org code' (dropdown), 'Activity code' (dropdown), 'SSN' (text input with a clear icon), and 'Exclude' (checkbox). There is a blue '+ Add To Template' button at the bottom right.


- The added lines of access will appear in the “Access Template” grid at the bottom


 A screenshot showing the 'Add Access Right' form at the top and the 'Access Template' grid below it. The grid has columns for Error, ID, POID, Agency subelem..., Org code, Activity code, SSN, Exclude, and Delete. It contains two rows of data.
 

Error	ID	POID	Agency subelem...	Org code	Activity code	SSN	Exclude	Delete
	1	1000	AG11				false	⊖
	2	1001	NL00				false	⊖


 At the bottom right of the grid, it says 'Total Rows: 2'. Below the grid are 'Finish' and 'Cancel' buttons.

- As lines of access are added, the system will verify them one by one for errors or conflicts. (See [Configure new user accounts and employments](#) for more information)

- a. *Note:* Adding multiple rows of access with identical information or conflicts will result in an error. These errors must be corrected before the access can be added. This can be done by editing the access in the row you are attempting to add or by deleting an existing line of access in the grid below row by selecting the  icon at the end of the row.

 The Access Right you are attempting to add conflicts with **Row 1**.  
Edit or remove one or more of the conflicting lines of Access in order to proceed. ×

7. Once you have added all the Access Rights you wish to add to the template, select the **“Finish”** button at the bottom.
8. A confirmation message will display and you can choose whether to return to the Access templates page, create another template, or navigate to another part of eOPF.

 **Access template created successfully.** Return to [Access templates](#) or [create another template](#).

### Apply an Access Template to a user profile

1. Follow steps 1-3 from the [this section](#) to navigate to the employee profile to edit.
2. Navigate down to the Roles and Access section and select **“Edit”**.

**Role and Access:**

ROLE [Edit](#)

POID	Agency Subelement	Org code	Activity code	SSN	Effective from	Effective to	Excluded

3. Select a Role from the “Role” dropdown if the user has not been assigned a Role yet.
4. Once a Role selection has been made, the Access Template dropdown box will appear. Select an available template to apply then press **“Apply Template”**.

**ROLE**


HR Admin ▼


Available templates

Select ▼

[Apply Template](#)

- a. *Note:* Some high level roles like the Agency Admin will not have any access templates available.

5. Adding a template that conflicts with the user’s existing access will result in an error. These errors must be corrected before the changes can be saved. This can be done by editing the fields in the rows of access marked with errors or by deleting one or more lines of access using the  icon at the end of the rows.

 Duplicate or conflicting Access Rights detected in the following rows:

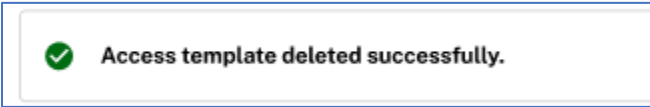
- Row 1
- Row 2
- Row 5

Edit or remove one or more of the **3 Access Rights** in order to proceed.

- a. *Note:* The system will automatically delete duplicate rows of access in a template if the user already has that access assigned.

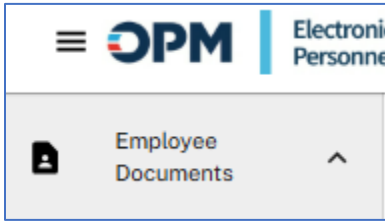


3. A confirmation message will display and the template will be removed from the grid.



## Employee Folder Search

1. Admins can access the employee folder search by clicking the “Employee Documents” tab in the left-side navigation or by clicking the “Search Folders” link on the home page beneath the welcome header.



2. From the Employee Folder search, enter the employee information in any of the available search fields then press “Search”. It is recommended to search by SSN.

The "Employee Folder Search" form contains the following fields and controls:

- SSN:** A text input field with a mask "-----" and a refresh icon.
- Employee ID:** A text input field.
- Last Name:** A text input field.
- First Name:** A text input field.
- POID:** A dropdown menu with "Select" as the current selection.
- ORG CODE:** A text input field.
- Buttons:** A blue "Search" button and a blue "Clear" button.

8. The matching results will be returned in the grid below the search fields. The list of employee folders is presented in alphabetical order by last name, but the order can be changed by selecting any of the column headings.

The "Employee Folder Search" results grid displays the following data:

LAST NAME	FIRST NAME, MI	SSN	SOURCE	POID	ORG CODE	ACTIVITY CODE	EMPLOYEE ID	FOLDER STATUS
ABULABAN	JENEE	***-**-6804	VATA	1782			TIM2147438324	ACTIVE
ALFEROS	PATTIE	***-**-8451	VATA	1782	VATA89905603	CHOLCOMB	TIM2147479959	INACTIVE
BATAYOLA	FRANKIE	***-**-6250	VATA	1782	VATA89905603	CHOLCOMB	TIM2147448192	ACTIVE
CUTHILL	CORRINE	***-**-8850	VATA	1782	VATA89905603	CHOLCOMB	TIM2147483481	ACTIVE
DOKTOR	ALETHA	***-**-7594	VATA	1782			TIM2147392108	ACTIVE

Note: A search for an employee outside of assigned access will result in a “No results found. Try a different search” message.

## View Documents

1. Double click on an employee’s folder to display a list of the documents within the OPF. The list of documents is presented in order by most recent effective date, but the order can be changed by selecting any of the column headings.

< **Documents for: ABULABAN, JENEE**

Download Print

<input type="checkbox"/>	FORM	NOA CODE	NOA CODE 2	AGENCY	FOLDER SIDE	EFFECTIVE DATE	CREATE DATE
<input type="checkbox"/>	SF 50	842		VETERANS HEALTH ADMINISTRATION	Permanent	06/03/2024	06/05/2024
<input type="checkbox"/>	SF 50	002	740	VETERANS HEALTH ADMINISTRATION	Permanent	05/31/2024	06/05/2024
<input type="checkbox"/>	SF 50	931		VETERANS HEALTH ADMINISTRATION	Permanent	06/03/2024	06/05/2024
<input type="checkbox"/>	SF 50	600		VETERANS HEALTH ADMINISTRATION	Permanent	06/01/2024	06/05/2024

Total Rows: 4

9. To view a document and its associated indexing information, select a form number. A document preview window opens providing a preview of the document. The indexing information is presented on the right.

Expand Close

**NAFI NOTIFICATION OF PERSONNEL ACTION**  
(Employee - see general information on reverse.)

1. NAME (Last, First, Middle Initial) (Mr or Mrs)  
uscipit laboriosam, nisi ut aliquid ex ea commodi conse

2. CITIZENSHIP - US  
3. Non-US Citizen  
4. Local Passport

5. DATE OF BIRTH (YY-MM-DD)  
04/07/2035

6. SSN  
369-00-84E

7. MILITARY STATUS - GDMZ - Below:  
8. Name  
9. DEPENDENT STATUS - Below:  
10. Child(ren) - Name

11. RETIREMENT  
12. LIFE AND ACCIDENT  
13. FICA (only if FICA)  
14. Other (S.A. Plans) - CROFFERS

15. FAIR LABOR STANDARD (ACT JEAN)  
16. Example: N - Nonexempt

17. DIA CODE  
18. NATURE OF ACTION (including employment category)  
19. EFFECTIVE DATE

20. FROM: (Position Title, Number and Authorization Number)  
21. PAY PLAN AND OCC CODE  
22. GRADE  
23. STEP OR RATE  
24. ANNUAL SALARY OR HOURLY RATE

25. CORE NAME AND LOCATION OF EMPLOYING NAFI  
26. CATEGORY OF NAFI  
(1) BENEFIT AND REVENUE SHARING  
(2) MEMBERSHIP ASSOCIATION  
(3) WELFARE

27. COACTIVITY  
28. TO: (Position Title, Number and Authorization Number)  
29. PAY PLAN AND OCC CODE  
30. GRADE  
31. STEP OR RATE  
32. ANNUAL SALARY OR HOURLY RATE

33. CORE NAME AND LOCATION OF EMPLOYING NAFI  
34. CATEGORY OF NAFI  
(1) BENEFIT AND REVENUE SHARING  
(2) MEMBERSHIP ASSOCIATION  
(3) WELFARE

SSN  
-----8451 [SHOW](#)

EFFECTIVE DATE  
2025-01-29

FORM  
AF-2545

TYPE  
PERSONNEL ACTION/SUPPORT DOC

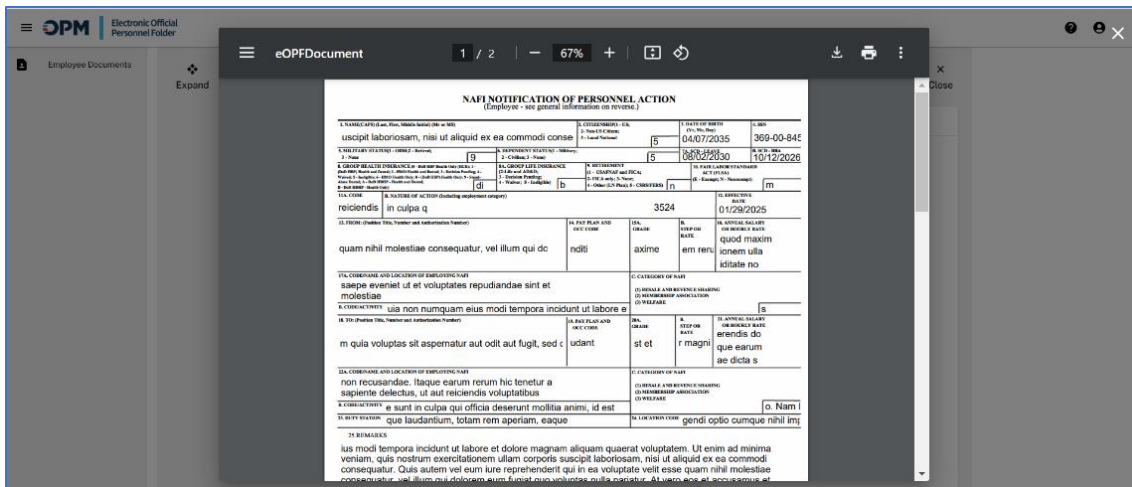
FOLDER SIDE  
Permanent

NOA CODE

NOA CODE 2

RETENTION DATE

10. If you would like to enlarge the page, select the Expand button at the top of the document preview window. A full-page view of the selected document displays. Then change the zoom percentage at the top of the document. You may download or print from the full-page view of the document by selecting the download icon or the print icon also at the top of the document.

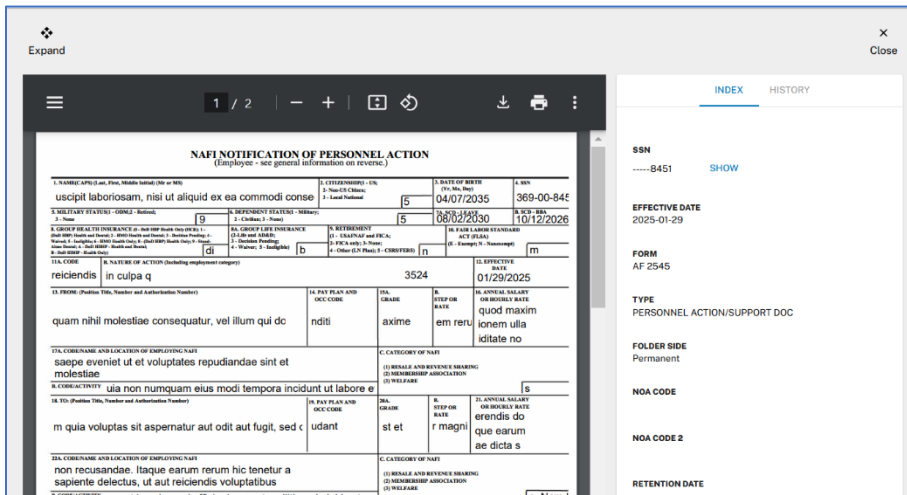




# Downloading and Printing Documents

There are two ways an Admin can download and/or print an employee's documents. It can be done from the document preview, or from the top of the Employee Documents list.

## Downloading/Printing from the Document Preview

1. From the Employee Documents list, click the form number of the document you wish to download or print.
2. A document preview of the selected form as well as the associated indexing information on the right displays.



11. Select the download icon  or the print icon  to download or print the selected document. Follow your system's prompts to download or print. When you are finished, select the Close icon in the top right corner. You are returned to the Employee Documents list.

## Downloading/Printing from the Employee Documents List

12. From the Employee Documents list, select the checkbox(es) next to the form number of the document(s) you wish to download or print. If you would like to print the entire folder, you can select the checkbox next to the Form column heading and all checkboxes will be selected.

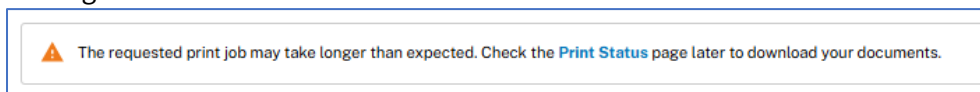
FORM	NOA CODE	NOA CODE 2	AGENCY	FOLDER SIDE	EFFECTIVE DATE	CREATE DATE
<input checked="" type="checkbox"/>	FR DEN.1		VETERANS HEALTH ADMINISTRATION	Temporary	01/29/2025	01/30/2025
<input checked="" type="checkbox"/>	NAF 52		VETERANS HEALTH ADMINISTRATION	Temporary	01/29/2025	01/30/2025
<input type="checkbox"/>	SF 2809		VETERANS HEALTH ADMINISTRATION	Permanent	01/29/2025	01/30/2025
<input type="checkbox"/>	SF 2810		VETERANS HEALTH ADMINISTRATION	Permanent	01/29/2025	01/30/2025

13. Select the download link Download or print link Print at the top of the Employee Documents list to download or print the selected document(s). Follow your system’s prompts to download or print.

### Print Status

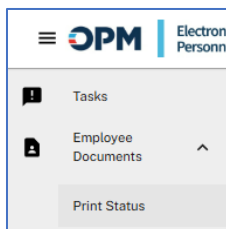
1. When printing more than 2 documents or a document of large file size, the following system message will display, guiding the user to the Print Status page to download the print request. This page can be accessed through the link in the message or by selecting the “Print Status” option under the “Employee Documents” tab in the left navigation.

a. System message



i.

b. Print Status tab



i.

2. Clicking the Print Status page will show a grid of all your print requests. The grid will be cleared every 48 hours at midnight EST. Print requests that are not ready to be downloaded will display “Pending” in the Processed date column.

**Print Status**

Click on the Request ID link to download the print request.  
This page will be cleared every 48 hours at midnight Eastern Standard Time. The current date and time is 04/11/2025 02:11 PM EDT.

Print requests are password protected. ⓘ

1 results returned of 1

Request ID	Employee name	Requesting user	Date requested ↓	Date processed	Document count	Delete
<a href="#">10040</a>	AALAND, KEVIN	VACCARELLO, MAUREEN	04/11/2025 2:11PM EST	Pending	9	✕

Rows per page: 5 1-1 of 1 < >

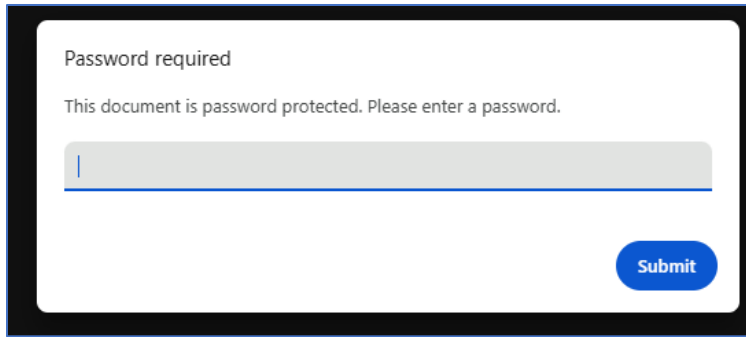
3. Refresh the page using the Refresh button in your browser to update the Print Status grid.

4. When the print request is done processing, click on the Request ID link to initiate the download.

Request ID	Employee name	Requesting user	Date requested ↓	Date processed	Document count	Delete
<a href="#">10040</a>	AALAND, KEVIN	VACCARELLO, MAUREEN	04/11/2025 2:11PM EST	04/11/2025 2:11PM EST	9	⊖

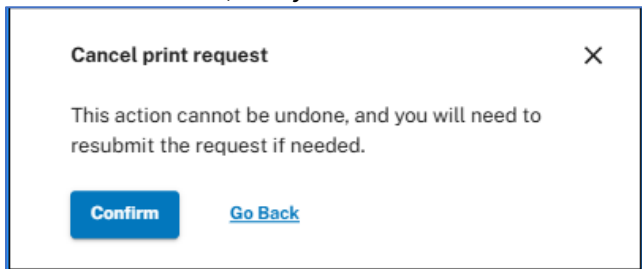
5. When opening the downloaded file, you will be prompted to enter a password.

a. Note: The password is a combination of the requesting user’s birth year and the Request ID. For example: 1980100

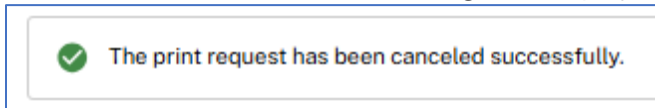


### *Canceling a print request*

1. If a pending print request is no longer needed, click the ✕ icon to cancel the request.
2. The pop-up modal below will display, giving you the option to confirm or cancel the action. Note that this action cannot be undone, and you will need to resubmit the request if needed.

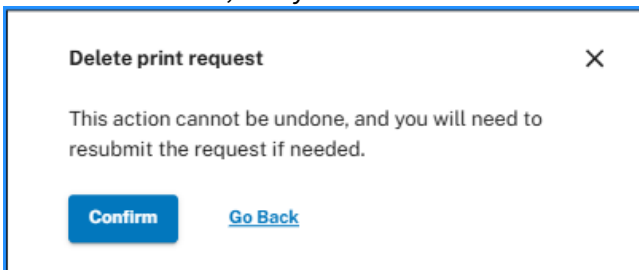


3. Once confirmed, a confirmation message will display and the print request will be removed from the grid.

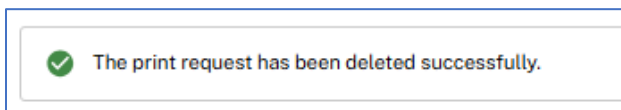


### *Deleting a print request*

1. If a completed print request is no longer needed, click the ⊖ icon to delete the request.
2. The pop-up modal below will display, giving you the option to confirm or cancel the action. Note that this action cannot be undone, and you will need to resubmit the request if needed.



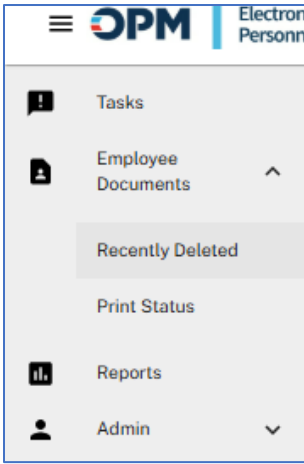
3. Once confirmed, a confirmation message will display and the print request will be removed from the grid.



## Purging documents

Documents that are deleted will be purged automatically after 120 days but Admins can manually purge documents before that.

1. Navigate to the “Recently deleted” tab under “Employee documents” in the left navigation.



2. The grid at the bottom will display a list of all the documents that you have deleted across all employee folders.

<input type="checkbox"/>	EMPLOYEE	FORM	NOA CODE	NOA CODE 2	FOLDER SIDE	DELETED DATE
<input type="checkbox"/>	<a href="#">HR TRANSFER MORSHIDA</a>	CSC 1170			Permanent	2025-04-21

Rows per page: 5 1-1 of 1

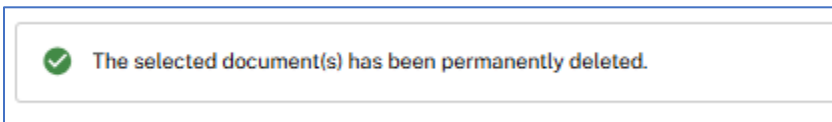
3. Use the checkboxes to select the document(s) you would like to purge then press Purge.

<input checked="" type="checkbox"/>	EMPLOYEE	FORM	NOA CODE	NOA CODE 2	FOLDER SIDE	DELETED DATE
<input checked="" type="checkbox"/>	<a href="#">HR TRANSFER MORSHIDA</a>	CSC 1170			Permanent	2025-04-21

1 row selected Rows per page: 5 1-1 of 1

- Note: There is also the ability to restore documents from this page. (See [Restore a document](#) for more information)

4. A confirmation message will display, and the document will be removed from the grid.



## Search for deleted documents

1. From the Recently deleted page, search for specific deleted documents by entering information in any of the available search fields then pressing “Search”.

## Recently Deleted

Documents that have been in Recently Deleted for more than 120 days will be automatically permanently deleted.

SSN  Employee ID

Last name  First name

Form  Folder side

Deleted date range (Start Date)  (End Date)

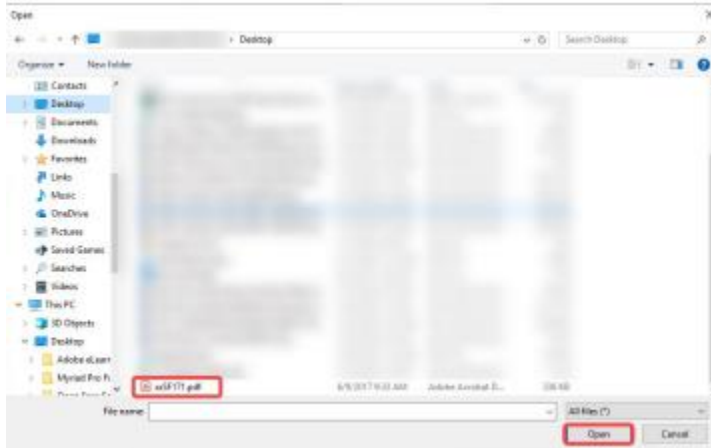
- The matching results will be returned in the grid below the search fields. Purge or restore the deleted documents as needed.

## Document Management

Users assigned the HR Document Management and HR Transfer roles will be able to add, delete, and modify documents

### Add a document

- From the Employee Documents list, click the  button.
- A dialog box display. Locate the PDF on the secure local or network drive.



- Select the PDF and click the Open button.
- A preview of the file will display for indexing.

**< Documents For: BENKOVIC, NEVA**

Standard Form 86  
Rev. 10/18  
U.S. Office of Personnel Management  
OPM Regs. 293-20.50(a)(4), 293-20.50(a)(5)

**NOTIFICATION OF PERSONNEL ACTION**

1. Name (Last, First, Middle) Scottamick, Henryyama K.		2. Social Security Number 263-34-2472	3. Date of Birth 08/16/1967	4. Effective Date 09/27/2002
---	--	--	--------------------------------	---------------------------------

<b>FIRST ACTION</b>		<b>SECOND ACTION</b>		
5-A. Code 355	5-B. Nature of Action Termination-Exp of Apppt	6-A. Code	6-B. Nature of Action	
5-C. Code	5-D. Legal Authority	6-C. Code	6-D. Legal Authority	
5-E. Code	5-F. Legal Authority	6-E. Code	6-F. Legal Authority	

7. FPMR: Position Title and Number  
OFFICE AUTOMATION CLERK  
F19-P9902J  
Position:00020265

8. Pay Plan  
GS

9. Grade or Level  
GS-10

10. Step or Rate  
1

11. Total Salary  
\$20,210.00

12. Pay Band  
PA

13. Pay Plan  
PA

14. Grade or Level  
GS-10

15. Step or Rate  
1

16. Total Salary/Annual  
\$20,210.00

17. Pay Band  
PA

18. Base Pay  
\$18,183.00

19. Locality Adj.  
\$2,197.00

20. Adj. Base Pay  
\$20,210.00

21. Other Pay  
\$0

22. Name and Location of Position's Organization  
Indian Health Service  
Portland Area Office  
Off Of Admin & Mgmt  
Div Of Prval Mgmt

**EMPLOYEE DATA**

23. Veterans Preference  
1 - None  
2 - 5 Year  
3 - 10 Year  
4 - 15 Year  
5 - 20 Year

24. Tenure  
1 - New  
2 - Reinstated  
3 - Promoted  
4 - Reinstated  
5 - Promoted  
6 - Reinstated  
7 - Promoted  
8 - Reinstated  
9 - Not Applicable

25. Agency Use  
1 - Yes  
2 - No

26. Veterans Preference for RIF  
1 - YES  
2 - NO

27. Retirement Plan  
1 - FICA  
2 - Other

28. Service Comp. Date (Leave)  
05/28/2002

29. Work Schedule  
1 - Full Time  
2 - Part Time  
3 - Seasonal  
4 - Temporary  
5 - Other

30. Pay Rate  
1 - Regular Rate  
2 - Other Rate

**POSITION DATA**

31. Position Occupied  
1 - Competitive Service  
2 - Excepted Service  
3 - SES General  
4 - SES Career  
5 - SES Career

32. SES Category  
1 - GS  
2 - GS  
3 - GS  
4 - GS  
5 - GS  
6 - GS  
7 - GS  
8 - GS  
9 - GS  
10 - GS  
11 - GS  
12 - GS  
13 - GS  
14 - GS  
15 - GS  
16 - GS  
17 - GS  
18 - GS  
19 - GS  
20 - GS  
21 - GS  
22 - GS  
23 - GS  
24 - GS  
25 - GS  
26 - GS  
27 - GS  
28 - GS  
29 - GS  
30 - GS  
31 - GS  
32 - GS  
33 - GS  
34 - GS  
35 - GS  
36 - GS  
37 - GS  
38 - GS  
39 - GS  
40 - GS  
41 - GS  
42 - GS  
43 - GS  
44 - GS  
45 - GS  
46 - GS  
47 - GS  
48 - GS  
49 - GS  
50 - GS

33. Appropriation Code  
N

34. Bargaining Unit Status  
7777

35. Duty Station Code  
PORTLAND C Jackman OR USA

36. Agency Data  
41160005

37. Reporting Address: 12852 SOUTH HWY 21, KELLER, WA 99140.

Selected File

HENRIYAMA-SCOTTOZUKI-20020927-SF50-NOA-355.pdf

Must index before saving.

NAME  
NEVA,BENKOVIC

EFFECTIVE DATE  
04/16/2025

FORM  
Select

TYPE  
TYPE

FOLDER SIDE  
FOLDER SIDE

NOA CODE 1  
Select

NOA CODE 2  
Select

RETENTION DATE  
MM/DD/YYYY

COMMENT  
COMMENT

- In the Effective Date field enter the date to match the effective date of the document.
- Select the Form from the drop down. The Type and Folder Side fields will auto-populate based on the Master Forms List (MFL). These fields cannot be edited.

**FORM**

CSC 1170

**TYPE**

EMPLOYEE

**FOLDER SIDE**

Permanent

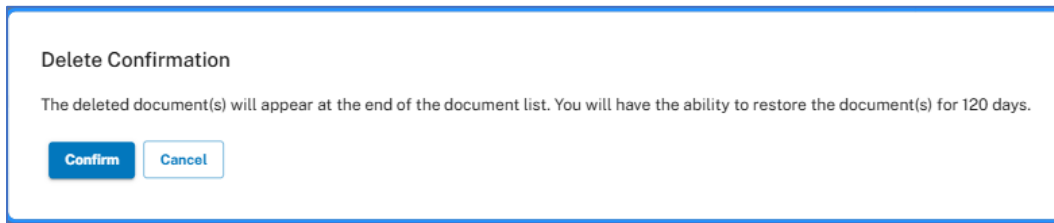
- Select NOA Code 1 and NOA Code 2 if applicable.
- Enter a Retention Date and Comment if applicable.
- Click **Save** to finish adding the document.
- A confirmation message displays with a green check mark indicating the document has been added successfully. Continue adding documents for the current employee or select the link in the message to search for another employee folder.

✔
Document added successfully  
Continue adding documents for this user or [search for another employee](#)
✕

## Delete a document

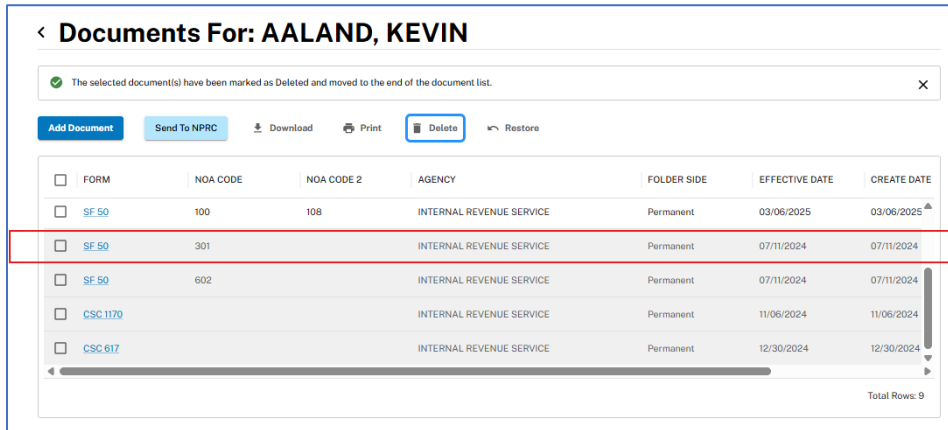
- On the Employee Documents list, use the checkboxes to select one or more documents then press the **Delete** button above the documents list.

2. A pop-up modal will appear prompting you to confirm or cancel the action.



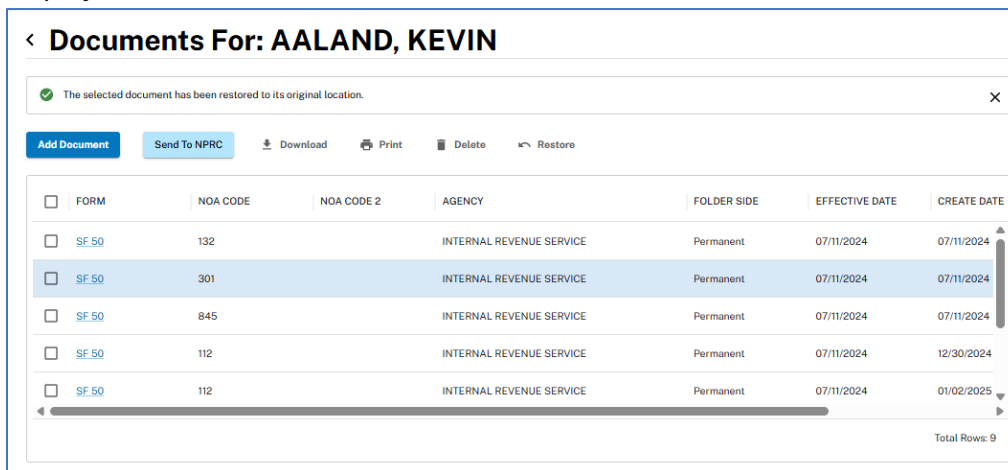
Note: Documents that are deleted will be able to be restored for 120 days.

3. After confirming the action, a confirmation message will display that the documents have been marked as “Deleted” and moved to the end of the document list and highlighted in grey.



## Restore a document

1. On the Employee Documents list, use the checkboxes to select one deleted document at a time and press the **Restore** button above the documents list.
2. A confirmation message will display that the document has been restored to its original location in the employee folder.



## Modify a document

This section will cover the user’s ability to:

- Reindex a document
- Insert pages into a document

- Reorder the pages of a document
  - Replace a document
  - Delete pages of a document
  - Extract a document
- Note: This guide will walk through the steps for each action one by one but many of these actions can be done in the same Modify document session.

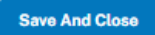
4. From the Employee Documents list, click the form number of the document you wish to modify.
5. A document preview of the selected form as well as the associated indexing information on the right displays.

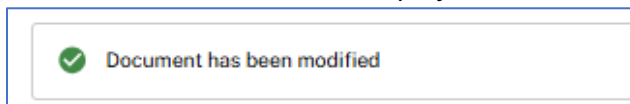


Click the **Modify** icon above the PDF preview to enter “Modify document” mode.

### Reindex a document

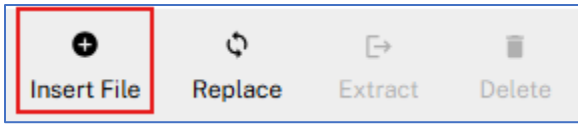
1. In “Modify document” mode, the right panel will display the indexing fields.

2. Make any changes to the indexing information then press .
  - a. Note: The Type and Folder Side fields will autopopulate based on Form selected. These fields are determined by the MFL and cannot be edited.
  - b. **IMPORTANT NOTE:** Agency specific forms: Agency specific forms will migrate to the new system and be indexed with Folder side “iAPF”. These documents can be reindexed to any other form on the MFL but they CANNOT be reindexed back to the “iAPF” folder side.
3. You will be taken back to the Employee Documents list and a confirmation message will display.

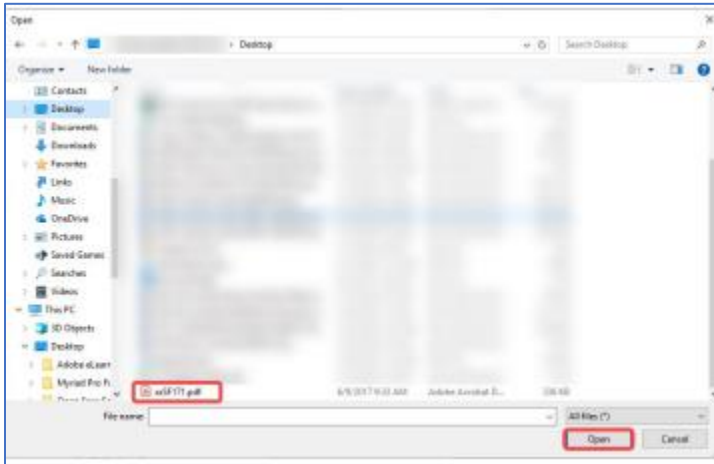


### Insert pages into a document

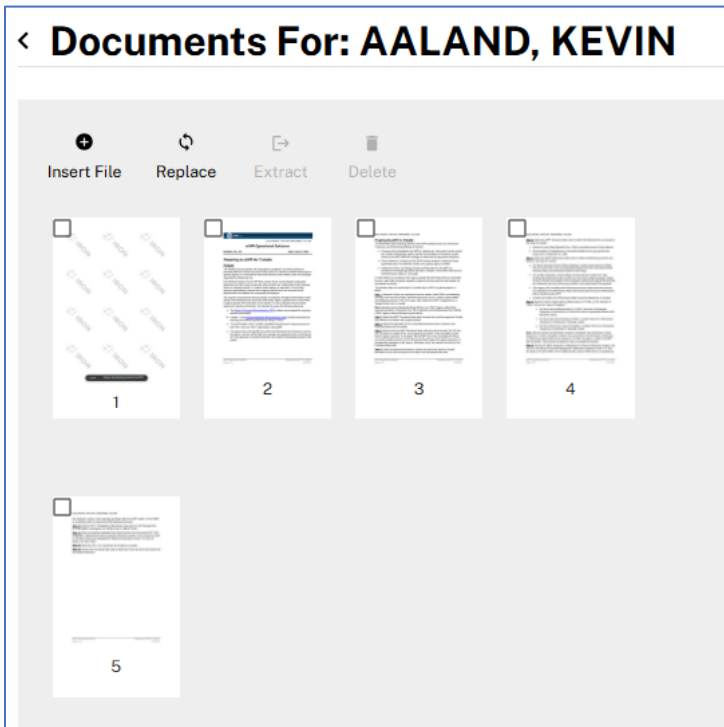
1. In “Modify document” mode, select the “Insert File” icon in the utilities above the PDF preview to insert additional pages into a document.



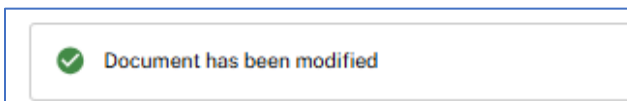
2. A dialog box displays. Locate the PDF to insert on the secure local or network drive.



3. The pages of the inserted document will appear in the PDF preview.

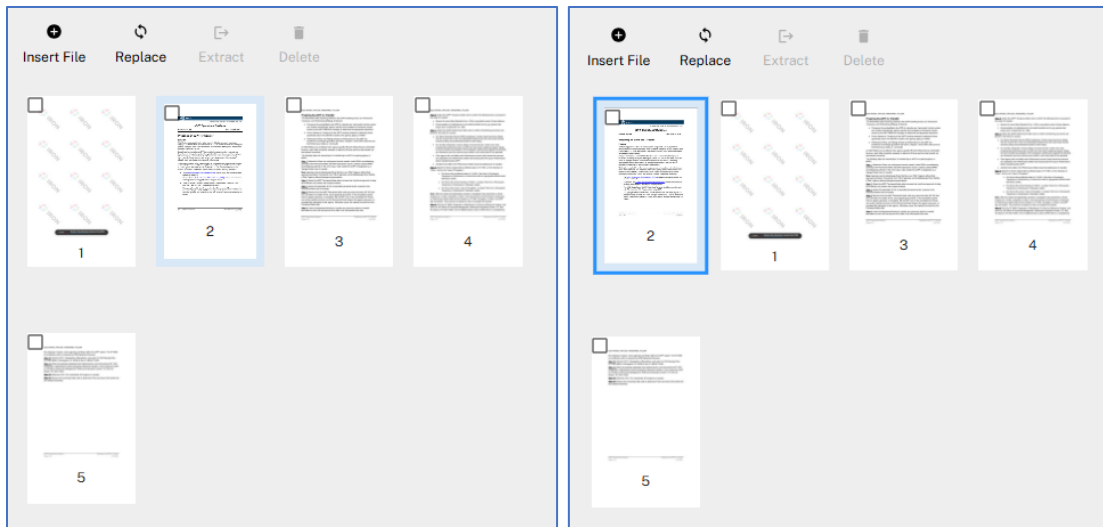


4. Continue adding pages as needed then press **Save And Close**.
5. You will be taken back to the Employee Documents list and a confirmation message will display.

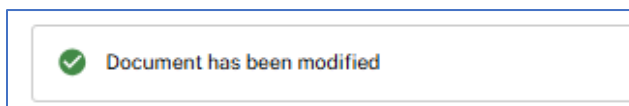


### Reorder the pages of a document

1. In “Modify document” mode, drag and drop pages to reorder them.

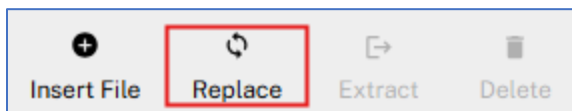


6. Continue reordering pages as needed then press **Save And Close**.
7. You will be taken back to the Employee Documents list and a confirmation message will display.

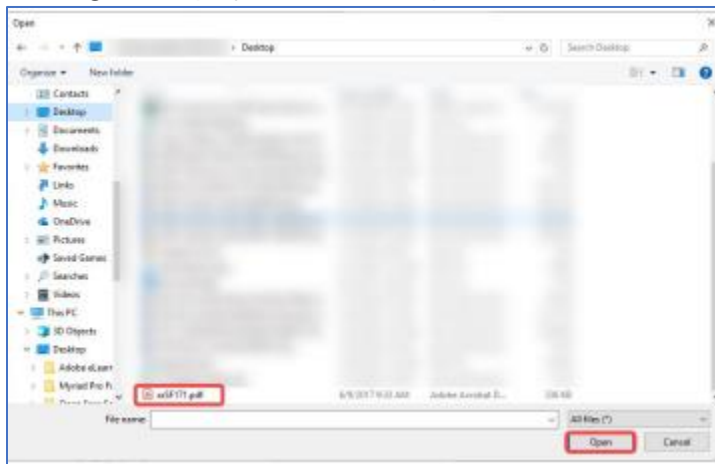


### Replace a document

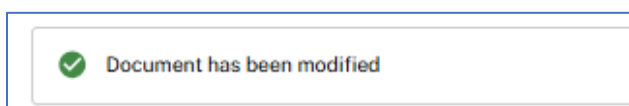
1. In “Modify document” mode, select the “Replace” icon in the utilities above the PDF preview to replace the entire document.



2. A dialog box displays. Locate the replacement PDF on the secure local or network drive.

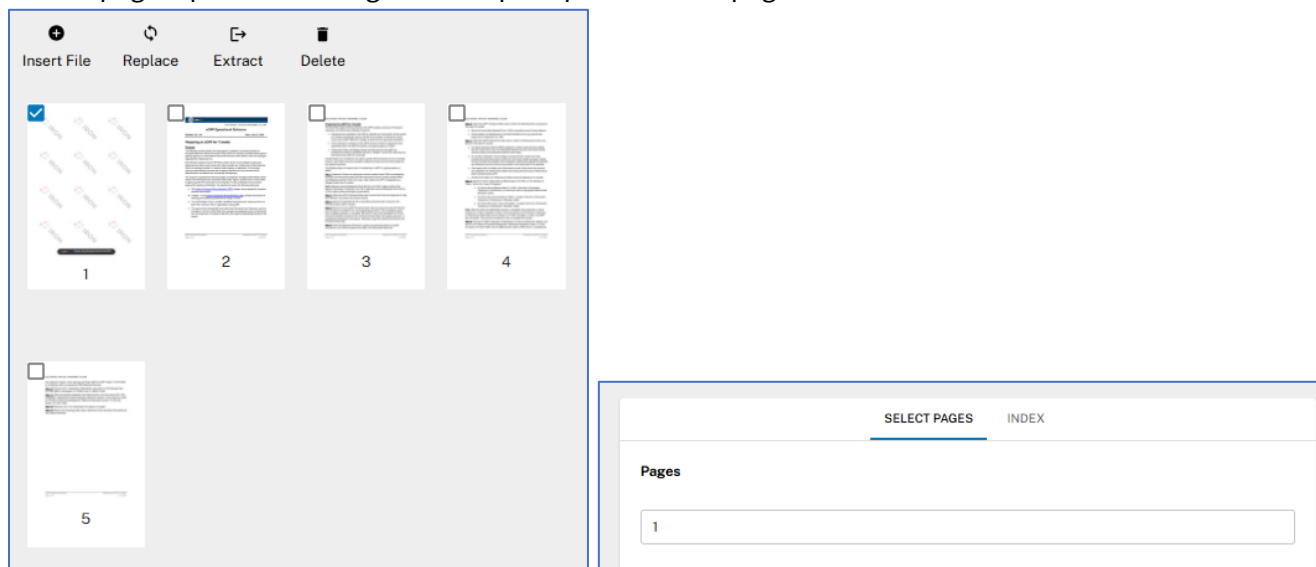



3. The pages of the replacement document will appear in the PDF preview.
4. Continue modifying the document as needed then press **Save And Close**.
5. You will be taken back to the Employee Documents list and a confirmation message will display.

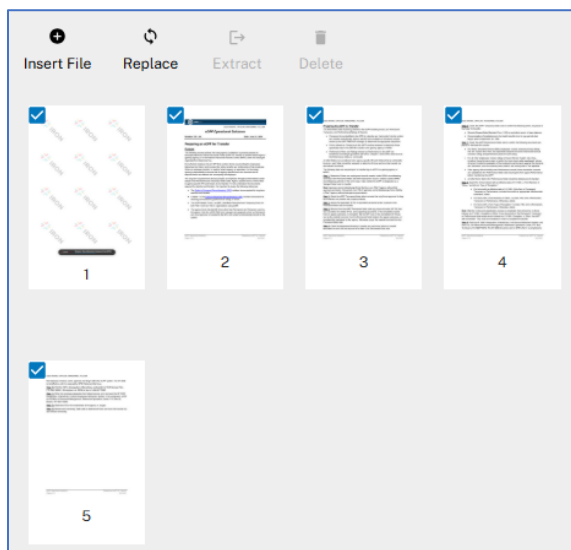



## Delete pages of a document

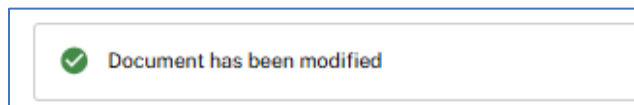
1. In “Modify document” mode, use the checkboxes to select the pages of the document you want to delete. The “Select pages” panel on the right will help keep track of the pages selected.



2. Click the  Delete icon above the PDF preview to delete the selected pages.
  - a. Note: You must leave at least one page in the document. The system will disable the “Delete” button when all pages are selected.

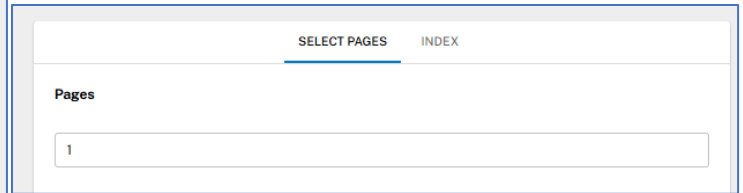
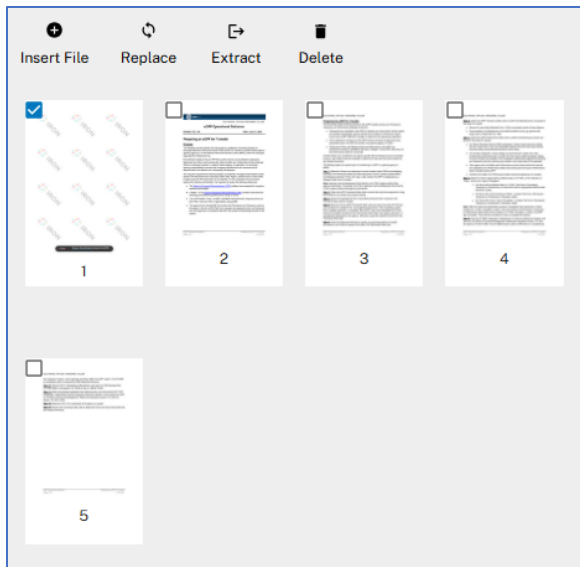


3. Continue modifying the document as needed then press .
4. You will be taken back to the Employee Documents list and a confirmation message will display.

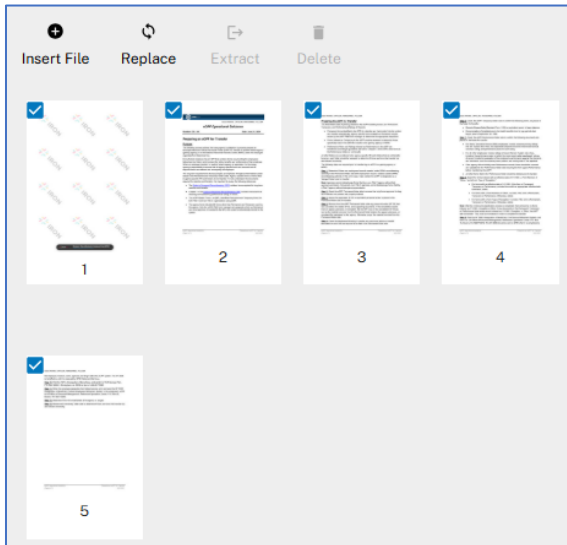


## Extract a document

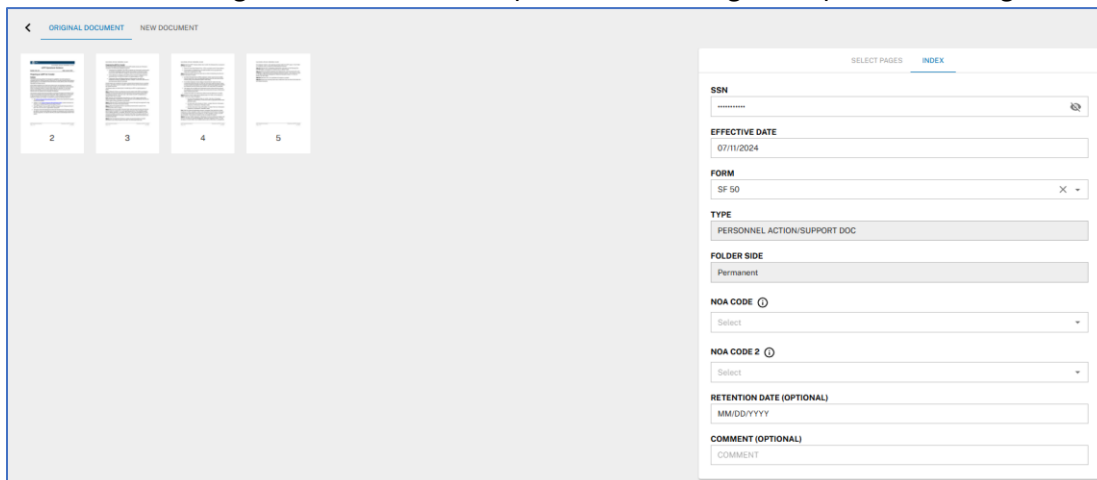
1. In “Modify document” mode, use the checkboxes to select the pages of the document you want to extract. The “Select pages” panel on the right will help keep track of the pages selected.



2. Click the **Extract** icon above the PDF preview to begin extracting the selected pages.
  - a. Note: You must leave at least one page in the document. The system will disable the “Extract” button when all pages are selected.



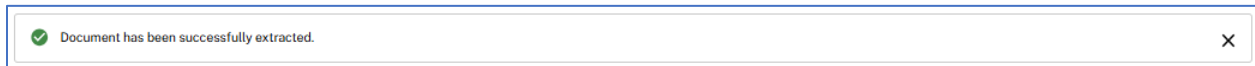
3. The system will separate the original document and the new document into two separate tabs in the top left corner. On the “Original Document” tab, update the indexing in the panel on the right if need be.



4. Then, select the “New Document” tab and update the indexing in the panel on the right if need be.

5. Once indexing of both documents is complete, press **Save**.

6. You will be taken back to the Employee Documents list and a confirmation message will display.



## Task management

Users assigned the HR Transfer role can access their work tasks from two locations- the Task summary and the Task page.

### Task summary

The Task summary is found on the home page and houses a user’s open, immediate tasks. The requests that appear in this grid are based on the user’s POID access. It contains new incoming transfer requests and in progress transfer requests that the viewing HR specialist is currently working on.

Three types of “Task status” may show up in the Task summary.

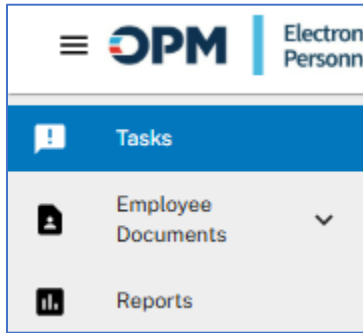
- 3. **New:** A brand-new incoming transfer request that has not been picked up by any HR Specialist
  - **In progress:** A transfer request that the viewing HR specialist has picked up but not yet completed
  - **Review required:** A transfer request that the viewing HR specialist has picked up and has had a note added to it from the Losing Agency.

Task Summary					
REQUEST #	LAST NAME	FIRST NAME, MI	AGENCY	REQ TYPE ^	TASK STATUS
• 122192	Doe	Jane L.	DOD-Gaining	Folder	NEW
• 24482	White	Alex	IHS-Gaining	Folder	NEW
388583	Taylor	Georgia	DOD-Gaining	Document	In progress
388583	Sanchez	Darby	ARMY-Losing	Folder	In progress
388583	Evans	Marshall	ARMY-Losing	Folder	In progress

[View all](#)

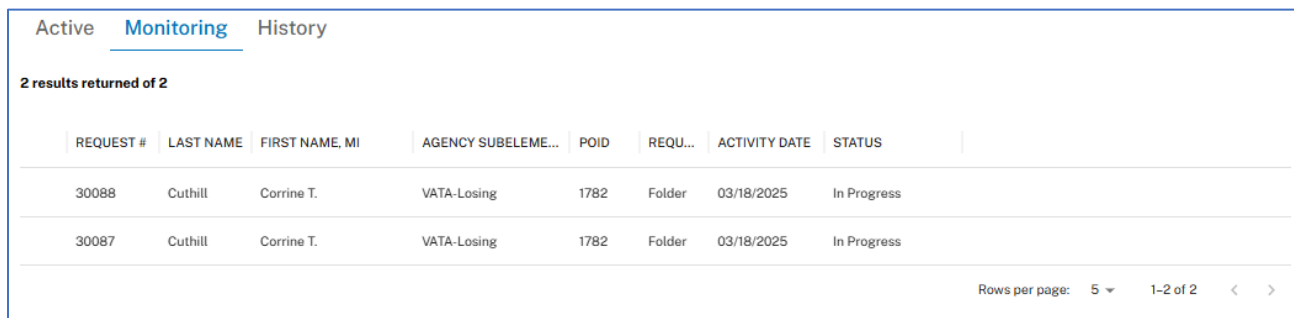
## Task list

The Task list page allows a user to search for and view all their tasks. Access the Task list by selecting the “Tasks” page in the left navigation



The Task list is separated into 3 tabs:

- **Active:** This tab houses requests that require action from the viewing HR specialist. The requests that appear in this tab are the same as those that appear in the [Task summary](#).
- **Monitoring:** This tab houses requests that are pending action from another agency.
- **History:** This tab houses completed and denied requests.



Active Monitoring History

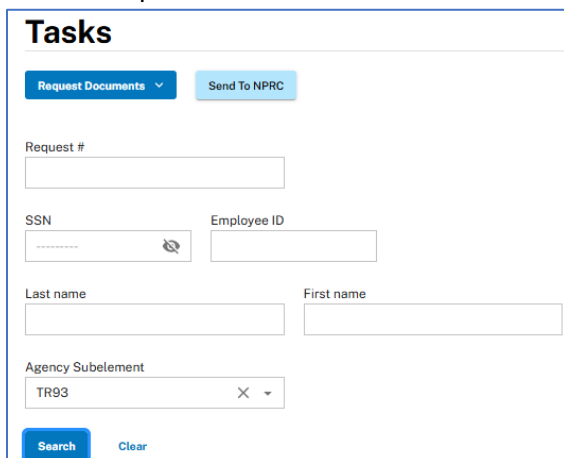
2 results returned of 2

REQUEST #	LAST NAME	FIRST NAME, MI	AGENCY SUBELEME...	POID	REQU...	ACTIVITY DATE	STATUS
30088	Cuthill	Corrine T.	VATA-Losing	1782	Folder	03/18/2025	In Progress
30087	Cuthill	Corrine T.	VATA-Losing	1782	Folder	03/18/2025	In Progress

Rows per page: 5 1-2 of 2 < >

## Search the Task list

1. To search for a specific request or group of requests, enter the search criteria in any of the available search fields then press “Search”.



**Tasks**

Request Documents Send To NPRC

Request #

SSN Employee ID

Last name First name

Agency Subelement

TR93 X

Search Clear

2. The matching results will be returned in the Task list below in their respective tabs. Double click the request to view the request details.

Active Monitoring History

1 results returned of 1

REQUEST #	LAST NAME	FIRST NAME, MI	AGENCY SUBELEME...	POID	REQU...	ACTIVITY DATE	STATUS
30078	Cuthill	Corrine T.	VATA-Gaining	1782	Folder	02/24/2025	Completed

Rows per page: 5 1-1 of 1

# Transfer

This section will cover requesting and responding to transfers between agencies and NPRC

## Gaining agency requests an Agency transfer

1. On the home page, select the “Request documents” button and select “Agency” from the dropdown to initiate an agency transfer request.

The screenshot shows a blue button labeled 'Request Documents' with a dropdown arrow. Below it, a dropdown menu is open, showing 'Agency' selected and 'NPRC' as an alternative option. To the right is a light blue button labeled 'Send To NPRC'.

2. Enter the SSN of the employee you would like to request a transfer for then press “Search”.

The screenshot shows a search form titled 'Select Employee To Request Transfer'. It includes a search instruction: 'Search for employee to request transfer by searching the SSN.' Below this is an input field labeled 'SSN' with a search icon and a blue 'Search' button.

3. If the account exists, the employee’s information will display. Review the accuracy of the information then press the “Select pick-up document” button.

The screenshot shows the 'Verify' section of the transfer request process. It includes a search instruction: 'Search for employee to request transfer by searching the SSN.' Below this is an input field labeled 'SSN' with a 'show' button and a blue 'Search' button. A table displays the employee information:

LAST NAME	FIRST NAME, MI	SSN	POID	ORG CODE	ACTIVITY CODE	FOLDER LOCATION	FOLDER STATUS	# OF DOCUMENTS
Doe	Jane L.	***-**-1234	1234	000000	111	HHS	Active	20

At the bottom of the page is a blue button labeled 'Select pick-up document'.

*Note: If the employee has multiple employments, use the checkboxes to select the folder that you would like to request. A separate transfer request must be submitted for each employment.*

4. Select the appropriate pick-up document to attach to the transfer request then press “Review pick-up document”. Only one pick-up document can be selected.



< **Review and submit request**

Add optional notes before submitting the request.

**Request Details**

**REQUESTER**  
Finn Franklin

**REQUESTER'S POID** ⓘ  
0000

**REQUEST TYPE**  
Folder

**GAINING AGENCY**  
DOD

**LOSING AGENCY**  
HHS


**Employee Information**

**EMPLOYEE NAME**  
[Doe, Jane L](#)

**EMPLOYEE SSN**  
\*\*\*-\*\*-1234 [show](#)

**EMPLOYEE POID**  
0000


**ATTACHMENTS**

 SF50\_JaneDoeL.pdf

**Notes**

Add optional notes for the viewing agency here

- To submit the transfer request, press "Submit". A confirmation message will display, and the request will appear in the "Monitoring" tab of the task list. (See [Task list](#) for more information)

 You have submitted a transfer request for Jane L Doe. [Request #122192](#) can be found on the Monitoring tab. ✕

## Losing agency responds to an Agency transfer request

- New incoming transfer requests can be found in two locations:
  - The [Task Summary](#) on the home page (*not all Admin accounts will show the Task Summary section*)
  - The "Active tab" on the [Task list](#)
- Clicking on a row from the Task Summary or the Task list will take you to the request details page. It is organized in a way to provide HR specialists with the most important information they need to complete their work right upon viewing the request.
  - Request details:** This section contains information about the employee to transfer
  - Activity:** System generated messages on transfer progress and notes from the other HR specialist working on the request will appear here.

- **Right-hand column:** This section contains time-based information and contact information about the Gaining agency and Losing agency HR specialists working on the request.

**< Request # 30088**

### Transfer of Corrine T. Cuthill's folder

[Start](#)

**Request Details**

<b>REQUEST TYPE</b>	<b>EMPLOYEE NAME</b>	<b>EMPLOYEE SSN</b>	<b>EMPLOYEE POID</b>
Folder	<a href="#">Cuthill, Corrine T.</a>	***-**-8850 <a href="#">Show</a>	1782

**Activity**

**ADD NOTE**

**MAUREEN VACCARELLO** 03/18/2025 10:42 AM EST

Transfer request submitted by **MAUREEN VACCARELLO**

Please ensure SF1150 is in eOPF when transferring to gaining agency

**ATTACHMENTS**

SF 50\_Cuthill, Corrine T..pdf

**TASK STATUS**  
New

**DATE REQUESTED**  
03/18/2025

**DAYS SINCE RECEIVED**  
32 days

**GAINING AGENCY**  
TR93

**ASSIGNED TO POID** ⓘ  
2753

**ASSIGNEE**  
 [MAUREEN VACCARELLO](#)

**LOSING AGENCY**  
VATA

**ASSIGNED TO POID** ⓘ  
1782

**ASSIGNEE**  
Unassigned

4. Review the information related to the request and begin processing the transfer request by pressing the “Start” button.
5. On the next page, review the pick-up document for accuracy. If all the information is correct and you wish to proceed with the transfer, select the “Continue” button; if not, select the “Deny” button (See [Deny a transfer request](#) for more information)

**< Transfer For: Cuthill, Corrine T.**

Please verify that the employee information in the pick-up document is correct.

[Continue](#)  
[Deny](#)

<b>AGENCY</b>	<b>REQUEST TYPE</b>	<b>DATE REQUESTED</b>
TR93	Folder	03/18/2025






**pages** 1 / 1 75% +

Standard Form 50  
The Office of Personnel Management  
OMB Number: 5010-106



**NOTIFICATION OF PERSONNEL ACTION**

1. Name (Last, First, Middle)		2. Social Security Number	3. Date of Birth	4. Effective Date
<b>FIRST ACTION</b>		<b>SECOND ACTION</b>		
5.A. Code/5.B. Nature of Action		6.A. Code/6.B. Nature of Action		
5.C. Code/5.D. Legal Authority		6.C. Code/6.D. Legal Authority		
5.E. Code/5.F. Legal Authority		6.E. Code/6.F. Legal Authority		
<b>7. FROM: Position Title and Number</b>		<b>10. TO: Position Title and Number</b>		
8. Pay Plan (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) (32) (33) (34) (35) (36) (37) (38) (39) (40) (41) (42) (43) (44) (45) (46) (47) (48) (49) (50) (51) (52) (53) (54) (55) (56) (57) (58) (59) (60) (61) (62) (63) (64) (65) (66) (67) (68) (69) (70) (71) (72) (73) (74) (75) (76) (77) (78) (79) (80) (81) (82) (83) (84) (85) (86) (87) (88) (89) (90) (91) (92) (93) (94) (95) (96) (97) (98) (99) (100) (101) (102) (103) (104) (105) (106) (107) (108) (109) (110) (111) (112) (113) (114) (115) (116) (117) (118) (119) (120) (121) (122) (123) (124) (125) (126) (127) (128) (129) (130) (131) (132) (133) (134) (135) (136) (137) (138) (139) (140) (141) (142) (143) (144) (145) (146) (147) (148) (149) (150) (151) (152) (153) (154) (155) (156) (157) (158) (159) (160) (161) (162) (163) (164) (165) (166) (167) (168) (169) (170) (171) (172) (173) (174) (175) (176) (177) (178) (179) (180) (181) (182) (183) 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37

6. Selecting “Continue” will bring you to the Folder review page. On this page, the HR specialist must ensure that the employee folder is complete and that all documents that will transfer are indexed correctly.
7. All forms that will transfer are automatically selected based on the Master Forms List (MFL). The “Ready to transfer” column in the document list will inform you of if the document is marked for transfer and if it contains any indexing errors. See below for a breakdown of the icons you will see in the “Ready to transfer” column:
  - : This indicates that the document is marked for transfer and is ready to transfer.
  - : This indicates that the document is marked for transfer but contains an indexing error and will need to be reindexed. (See [Reindexing documents with errors](#) for more information)
  - : This indicates that the document is not marked for transfer and will be deleted at time of transfer.
8. Once all documents are ready for transfer, press the  button.
9. A list of only the documents that will transfer will display. Confirm the documents are correct then press  or go back to continue making edits.

**< Documents Selected For Transfer**


The following documents will be transferred. Documents are automatically selected for transfer and cannot be unselected.  

**⚠** If you have any employee documents that should be transferred but are not identified, please follow these steps:

1. Proceed with the transfer of the selected documents.
2. Send the document(s) via email or mail to the Gaining Agency or NPRC, outside of the Employee Personnel Folder. Update the transfer request notes with details about the non-identified documents submitted.
3. Contact your Account Manager to start the adjudication process for identifying the form(s) for transfer on the Master Forms List.

NAME	POID	AGENCY	FORM	NOA CODE	NOA CODE 2	SOURCE	FOLDER SIDE	EFFECTIVE DATE	CREATE DATE
Braune, Henry G.	4152	BUREAU OF ALCOHOL, TOBACCO, FIREARMS, AND EXPLOSIVES	<input checked="" type="checkbox"/>	SF 1126		National Personnel R...	Permanent	2025-04-18	2025-04-18



10. Note: this page also contains instructions on what to do if you think there are documents that should be transferred:
  1. Proceed with the transfer of the selected documents.
  2. Send the document(s) via email or mail to the Gaining Agency or NPRC, outside of eOPF. Update the transfer request notes with details about the non-identified documents submitted.
  3. Contact your Account Manager to start the adjudication process for identifying the form(s) for transfer on the Master Forms List.

11. Read and agree to the two acknowledgements that appear on the screen then press .

**< Complete Transfer**

To complete this transfer, you must check the boxes and confirm the following:



- I have reviewed all employee folder documents for completeness and accuracy.
- I understand that all documents that are not auto-selected for transfer will be deleted. Deleted documents can be restored for 120 days by returning to the employee's folder.

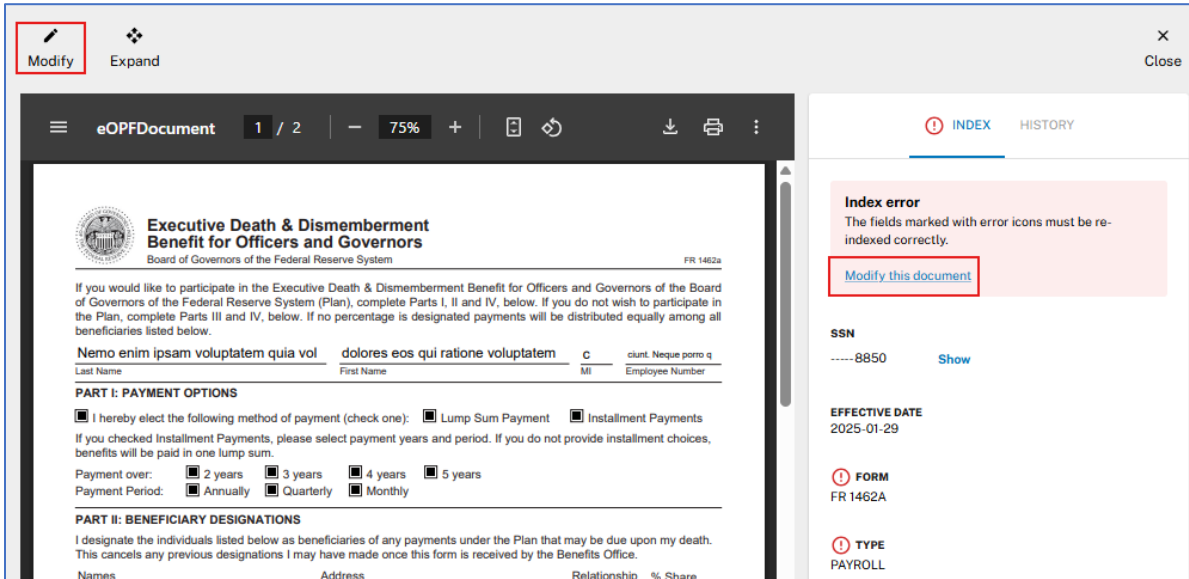




12. A confirmation message will display, and the request will appear in the “History” tab of the task list. (See [Task list](#) for more information)

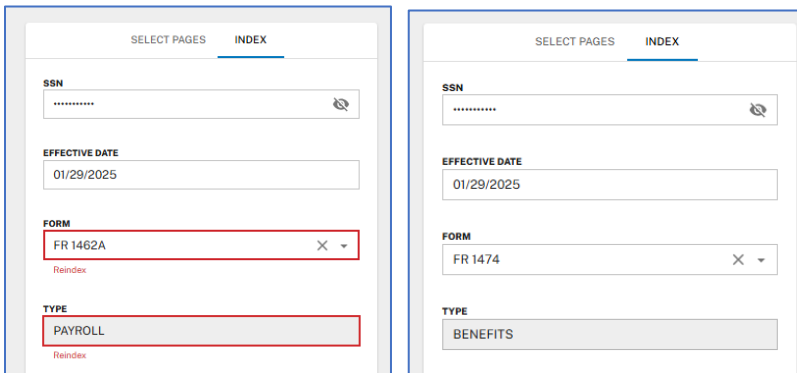
✓ You have transferred Henry G. Braune's employee folder. Request #30111 can be found on the History tab.


## Reindexing documents with errors

1. To reindex a document with error, click the row containing the  icon. The document preview will appear below the list of documents.
2. The indexing panel will display an error and the indexing fields with errors will be marked with the  icon. Click the “Modify” button or the link in the indexing error to enter modify document mode.



3. Reindex the indexing fields with error then press  to return to the Review Folder page.



4. The document will now display  in the “Ready to transfer” column. Continue reindexing documents until all error icons are gone.

## Denying a transfer request

13. Selecting “Deny” will redirect you to the Deny transfer request page to select a reason for denial of the transfer and to provide notes related to the denial. When done, press the “Deny” button.

< **Deny Transfer Request**

All fields are required unless marked optional.

**Request Details**

**GAINING AGENCY**  
TR93

**LOSING AGENCY**  
VATA

**DATE REQUESTED**  
03/18/2025

**Employee Information**

**EMPLOYEE NAME**  
Cuthill, Corrine T.

**SSN**  
----8850 [Show](#)

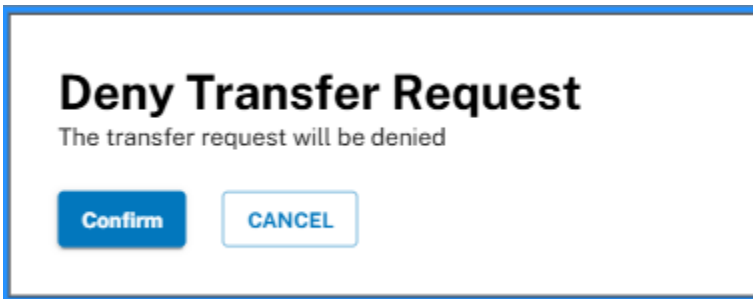
**EMPLOYEE POID**  
1782

**REASON**  
Select

**NOTES**  
Click to add note

[Deny](#)

14. The pop-up modal below will display, giving you the option to confirm or cancel the action. After selecting “Confirm” you will be redirected to the Task list page.



15. A confirmation message will display and the denied request will appear in the “History” tab of the Task list with “Status” set to “Denied”

✓ You have denied Corrine T. Cuthill's transfer request to TR93. [Request #30088](#) can be found on the History tab.

Active Monitoring History

5 results returned of 102

REQUEST #	LAST NAME	FIRST NAME, MI	AGENCY SUBELEME...	POID	REQU...	ACTIVITY DATE	STATUS
30088	Cuthill	Corrine T.	VATA-Losing/TR93-G...	1782-...	Folder	04/19/2025	Denied

### Adding a note to a transfer request

During a transfer, you can add a note to the transfer request to communicate with the other agency involved in the transfer. Some examples of when it might be useful to add a note are:

- To check-in on the status of a transfer
  - To ask questions or request any missing information about a transfer
  - To indicate if another HR specialist will be working on a request
1. Open up any transfer request to view the request details.
  2. In the “Activity” section, click into the “Add note” box and type your message to the other agency. Then press “Post”.

The screenshot shows a user interface for an 'Activity' section. At the top, there is a header 'Activity'. Below it is a section titled 'ADD NOTE' with a text input field containing the text 'Checking in on the status of this transfer'. Below the input field are two buttons: 'Post' and 'Cancel'.

3. The note will be published in the Activity section. On the other agency’s side, this request will appear in their Task Summary or Active tab with the status “Review required”, alerting them to open the request details and read the note.

The screenshot shows the 'Activity' section after the note has been published. The 'ADD NOTE' section is now empty. Below it, a note is displayed with a blue dot icon, a timestamp '04/21/2025 13:17 PM EST', and the text 'Checking in on the status of this transfer.'.

What the other agency will see in their Task summary or Active tab:

The screenshot shows a row of information in a task summary or active tab. The row contains the following text: '20064', 'COLELLA', 'JOE T.', 'EDEP-Gaining', 'Folder', and 'Review Required'.

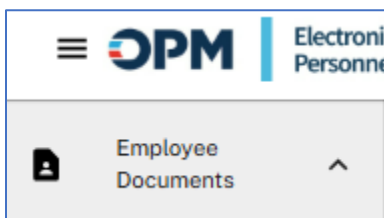
## Late-arriving Documents (Reprocessing)

Late-arriving documents that come through the electronic data feeds (EDF) will be automatically uploaded to the employee’s folder and then forwarded to the Gaining Agency **IF** the document is indicated for transfer by the MFL.

- Note: If the document is not indicated for transfer by the MFL, it will remain in the folder for 120 days before it is purged.

For late-arriving documents that need to be manually uploaded, follow the steps below.

1. Navigate to the “Employee Documents” tab in the left-side navigation.



2. From the Employee Folder search, enter the employee information in any of the available search fields then press “Search”. It is recommended to search by SSN.

**Employee Folder Search**

Search federal employee information to find available employee folders.

SSN  Employee ID

Last Name  First Name

POID  ORG CODE

**Search** [Clear](#)

3. The matching results will be returned in the grid below the search fields. Double click on the row to open up the employee’s folder.

**Employee Folder Search**

Search federal employee information to find available employee folders.

SSN  Employee ID

Last Name  First Name

POID  ORG CODE

**Search** [Clear](#)

10 results returned of 15

LAST NAME	FIRST NAME, MI	SSN	SOURCE	POID	ORG CODE	ACTIVITY CODE	EMPLOYEE ID	FOLDER STATUS
ABULABAN	JENEE	***-**-6804	VATA	1782			TIM2147438324	ACTIVE
ALFEROS	PATTIE	***-**-8451	VATA	1782	VATA89905603	CHOLCOMB	TIM2147479959	INACTIVE
BATAYOLA	FRANKIE	***-**-6250	VATA	1782	VATA89905603	CHOLCOMB	TIM2147448192	ACTIVE
CUTHILL	CORRINE	***-**-8850	VATA	1782	VATA89905603	CHOLCOMB	TIM2147483481	ACTIVE
DOKTOR	ALETHA	***-**-7594	VATA	1782			TIM2147392108	ACTIVE

Note: A search for an employee outside of assigned access will result in a “No results found. Try a different search” message.

4. Follow the steps in the [Add a document](#) section of this guide to upload the document to the employee’s folder.
5. The document will automatically be forwarded to the Gaining Agency the following day **IF** the document is indicated for transfer by the MFL.
  - a. If the document is **NOT** indicated for transfer by the MFL, it will remain in the employee folder until it is purged either manually or automatically after 120 days.

## Gaining agency requests a transfer from NPRC

1. On the home page, select the “Request documents” button and select “NPRC” from the dropdown to initiate a transfer request from NPRC.

2. Enter the SSN of the employee you would like to request a transfer for then press “Search”.

3. If the folder exists at NPRC, the employee’s information will display. Review the accuracy of the information then press the “Select SF 127” button.

LAST NAME	FIRST NAME, MI	SSN	POID	ORG CODE	ACTIVITY CODE	FOLDER LOCATION	FOLDER STATUS	# OF DOCUMENTS
Smith	John D.	***-**-3333	NPRC	00	00	NARA	Active	20

4. Select the appropriate SF 127 to attach to the transfer request then press “Review SF 127”. Only one document can be selected.

FORM	NOA CODE	NOA CODE 2	SOURCE	FOLDER SIDE	EFFECTIVE DATE	CREATE DATE
<input checked="" type="checkbox"/> SF 127	000	000	HHS	Temporary	00/00/0000	00/00/0000
<input type="checkbox"/> SF 127	000	-	HHS	Temporary	00/00/0000	00/00/0000

5. A preview of the selected SF 127 and the indexing will display. Review the accuracy of the form and indexing then press “Review transfer request”. To reselect a SF 127 document, press the “Back” button.

## < Review SF 127

Review the accuracy of the information on the SF 127 before submitting the transfer request.

Page X of X		1. DATE OF REQUEST
<b>REQUEST FOR OFFICIAL PERSONNEL FOLDER</b> (REPEATED BY DIVISION)		
SECTION I - TO BE COMPLETED BY REQUESTING PERSONNEL OFFICE		
2. CURRENT NAME (Last, first, middle)	NATIONAL ARCHIVES AND RECORDS ADMINISTRATION NATIONAL PERSONNEL RECORDS CENTER (Division Personnel Records) 1411 Boulder Boulevard Vadonoye, IL 62295-2963 Fax Number: (618) 935-3014	
3. DATE OF BIRTH (mm/dd/yyyy)		
4. SOCIAL SECURITY NUMBER	FAX NUMBER: (618) 935-3014	
ONE FORM IS REQUIRED FOR EACH FOLDER REQUESTED. REQUESTS MAY BE FAXED OR MAILED TO THE NATIONAL PERSONNEL RECORDS CENTER.		
5. PREVIOUS FEDERAL EMPLOYMENT		
AGENCY AND BUREAU	LOCATION	FROM TO
6. REASON FOR REQUEST (Check appropriate box)		
<input type="checkbox"/> a. Currently employed.	<input type="checkbox"/> b. Temporary use.	<input type="checkbox"/> c. Pre-employment consideration. Will retain folder if hired.
7. Remarks		
SECTION II - FOR USE BY RECORDS CENTER		
<input type="checkbox"/> a. Paper OFF Folder shipped.	<input type="checkbox"/> h. Folder was sent (Date)	
<input type="checkbox"/> b. eOFF Folder transmitted.	To:	
<input type="checkbox"/> c. eOFF Paper Copy shipped.		
<input type="checkbox"/> d. Paper / eOFF (Circle one or both) records restricted. Transcript of Service will be sent.	<input type="checkbox"/> Your Agency	
<input type="checkbox"/> e. Our search did not reveal a Paper OFF or eOFF record for the civilian. Federal employment claimed.	<input type="checkbox"/> I. Other details	
<input type="checkbox"/> f. Paper OFF Folder not located. For a former employee of your agency, we suggest a further search of your agency. If fully enclosed, verify name, date of birth and social security number, and return request to NPRC together with the date folder was transferred to NPRC and relevant agency, date of birth, and social security numbers of other folders in same shipment.		
<input type="checkbox"/> g. Our search found evidence of a Paper OFF Folder that has not been received by this center. Suggest that you contact the local employing office.	DATE	INITIALS
SECTION III - TO BE COMPLETED BY REQUESTING PERSONNEL OFFICE		
FULL NAME OF REQUESTING AGENCY (INCLUDE SUB AGENCY)	NAME OF REQUESTER	TELEPHONE NO. (include area code)
		027
AGENCY RECORD GROUP	AGENCY CHARGE ACCOUNT	
Enter complete address to which folder should be mailed. include ZIP Code.		
STANDARD FORM 127 (01-11) Prescribed by NARA, 58 CFR 1333.10(a)(2)		

[Review Transfer Request](#) [Back](#)

SSN  
\*\*\*-\*\*-3333 [show](#)

EFFECTIVE DATE  
06/20/2024

FORM  
SF 127

TYPE  
Personal Action/Support Doc

FOLDER SIDE  
Temporary

NOA CODE  
-

RETENTION DATE  
-

COMMENT  
-

- Before submitting the transfer request, review the request details to ensure all the information is correct.
  - Provide additional details for the Losing Agency to view in the “Notes” box if applicable. This note will appear in the “Activity” section of the request details page.

< **Review and submit request**

Add optional notes before submitting the request.

**Request Details**

**REQUESTER**  
Finn Franklin

**REQUESTER'S POID** ⓘ  
0000

**REQUEST TYPE**  
Folder

**GAINING AGENCY**  
DOD

**LOSING AGENCY**  
HHS


**Employee Information**

**EMPLOYEE NAME**  
[Doe, Jane L](#)

**EMPLOYEE SSN**  
\*\*\*-\*\*-1234 [show](#)

**EMPLOYEE POID**  
0000


**ATTACHMENTS**

 SF50\_JaneDoeL.pdf

**Notes**

Add optional notes for the viewing agency here

7. To submit the transfer request, press "Submit". A confirmation message will display, and the request will appear in the "Monitoring" tab of the task list. (See [Task list](#) for more information)

 You have submitted a transfer request for Jane L Doe. [Request #122192](#) can be found on the Monitoring tab. ✕

## NPRC responds to a transfer request

16. New incoming transfer requests can be found in two locations:
  17. The [Task Summary](#) on the home page (*not all Admin accounts will show the Task Summary section*)
  18. The "Active tab" on the [Task list](#)
19. Clicking on a row from the Task Summary or the Task list will take you to the request details page. It is organized in a way to provide HR specialists with the most important information they need to complete their work right upon viewing the request.
  - **Request details:** This section contains information about the employee to transfer
  - **Activity:** System generated messages on transfer progress and notes from the other HR specialist working on the request will appear here.

- **Right-hand column:** This section contains time based information and contact information about the Gaining agency and Losing agency HR specialists working on the request.

< **Request # 30088**

### Transfer of Corrine T. Cuthill's folder

[Start](#)

---

**Request Details**

REQUEST TYPE	EMPLOYEE NAME	EMPLOYEE SSN	EMPLOYEE POID
Folder	<a href="#">Cuthill, Corrine T.</a>	***-**-8850 <a href="#">Show</a>	1782

---

**Activity**


**ADD NOTE**

**MAUREEN VACCARELLO** 03/18/2025 10:42 AM EST

Transfer request submitted by **MAUREEN VACCARELLO**

Please ensure SF1150 is in eOPF when transferring to gaining agency

**ATTACHMENTS**

 SF 50\_Cuthill, Corrine T..pdf

**TASK STATUS**  
New

**DATE REQUESTED**  
03/18/2025

**DAYS SINCE RECEIVED**  
32 days

---

**GAINING AGENCY**  
TR93

**ASSIGNED TO POID** ⓘ  
2753

**ASSIGNEE**  
 [MAUREEN VACCARELLO](#)


---

**LOSING AGENCY**  
VATA

**ASSIGNED TO POID** ⓘ  
1782

**ASSIGNEE**  
Unassigned

20. Review the information related to the request and begin processing the transfer request by pressing the “Start” button.

21. On the next page, review the SF 127 for accuracy. If all the information is correct and you wish to proceed with the transfer, download the document using the  icon, complete Section II on the SF 127 outside of eOPF, then select the “Continue” button; if not, select the “Deny” button (See [Deny a transfer request](#) for more information)

< **Transfer For: Transfer, Nancy**

Please verify that the information in the SF 127 form is correct, download the document, and complete Section II.

[Continue](#)  
[Deny](#)

AGENCY	REQUEST TYPE	DATE REQUESTED
OM00	Folder	03/26/2025

**losing** 1 / 1 75%

**March is Colorectal Cancer Awareness Month**

Colorectal cancer refers to both rectal and colon cancers. It is the second leading cause of cancer death in men and women combined in the United States. Colorectal cancer is the third most common cancer type worldwide; in 2020, almost 2 million cases were diagnosed. It is the second most common cause of cancer death, leading to almost 1 million deaths per year. This is despite the fact that effective screening techniques exist that could reduce the number of deaths from this disease.

Colorectal Cancer Awareness Month is observed in March to highlight the importance of screening for colorectal cancer, as well as to promote healthy lifestyle habits that can decrease a person's risk of developing cancer of the colon, rectum, or anus – the three distinct cancer types referred to collectively as colorectal cancer.

**Fast facts:**

- Colorectal cancer is the 2nd leading cause of cancer death among men and women combined in the United States.
- 25-30% of CRC patients have a family history of the disease.
- An estimated 60% of colorectal cancer deaths could be prevented with screening.
- On average, one in 23 men and one in 25 women will be diagnosed with colorectal cancer.
- 1 in 3 people are not up-to-date with colorectal cancer screening. But affordable, take-home options exist.

Many of us have been personally impacted by this treatable disease. Join us this month as we raise awareness, get tested, and adopt a healthier lifestyle.

[Information](#)

**INDEX**

**SSN**  
213-24-2422

**EFFECTIVE DATE**  
03/25/2025

**FORM**  
SF 127

**TYPE**  
EMPLOYEE

**NOA CODE**

**NOA CODE 2**

**COMMENT**

**FOLDER SIDE**  
Permanent

**RETENTION DATE**

22. Press the “Upload SF 127” and select the completed SF 127 from your computer directory.

## < Upload SF 127

After completing Section II of the SF 127, upload the completed document.

Upload SF 127

23. A preview of the selected SF 127 and the original indexing will display. Review the accuracy of the SF 127 then press the “Review employee folder” button at the bottom.

## < Review SF 127

Review the accuracy of the information on the SF 127 form before continuing.

INDEX

SSN  
213-24-2422

EFFECTIVE DATE  
03/25/2025

FORM  
SF 127

TYPE  
EMPLOYEE

NOA CODE

NOA CODE 2  
NOA CODE 2

COMMENT

FOLDER SIDE  
Permanent

RETENTION DATE

Review Employee Folder

Edit

24. A list of the documents that will transfer will display. Press Transfer or go back to make any edits to the SF 127.

## < Documents selected for transfer to agency

The following documents will be transferred. Documents are automatically selected for transfer and cannot be unselected.

Transfer

Back

NAME	POID	AGENCY					
Doe, Jane L.	1200	DOD					
FORM	NOA CODE	NOA CODE 2	SOURCE	FOLDER SIDE	EFFECTIVE DATE	CREATE DATE	
<input checked="" type="checkbox"/> SF50 Notification of Personnel Action	002-Correction	571	HHS	Permanent	00/00/0000	00/00/0000	
<input checked="" type="checkbox"/> SF50 Notification of Personnel Action	893-WGI		HHS	Permanent	00/00/0000	00/00/0000	
<input checked="" type="checkbox"/> SF50 Notification of Personnel Action	894-GEN ADJ		HHS	Permanent	00/00/0000	00/00/0000	

25. A confirmation message will display, and the request will appear in the “History” tab of the task list. (See [Task list](#) for more information)

✔ You have transferred Henry G. Braune's employee folder. [Request #30111](#) can be found on the History tab.

## Losing agency sends a folder to NPRC

1. On the home page, select the “Send to NPRC” button initiate a transfer to NPRC.



2. Enter the SSN of the employee you would like to transfer the folder of then press “Search”.



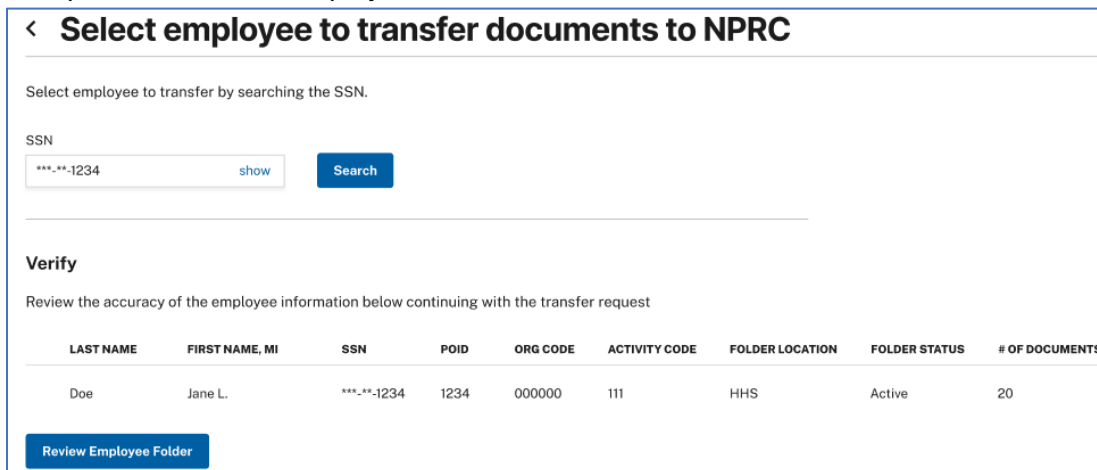
< **Select Employee To Transfer Documents To NPRC**

Select employee to transfer by searching the SSN.

SSN

----- 🔍 **Search**

3. If the account and folder exist, the employee’s information will display. Review the accuracy of the information then press the “Review employee folder” button.



< **Select employee to transfer documents to NPRC**

Select employee to transfer by searching the SSN.

SSN

\*\*\*-\*\*-1234 show **Search**

---

**Verify**

Review the accuracy of the employee information below continuing with the transfer request

LAST NAME	FIRST NAME, MI	SSN	POID	ORG CODE	ACTIVITY CODE	FOLDER LOCATION	FOLDER STATUS	# OF DOCUMENTS
Doe	Jane L.	***-**-1234	1234	000000	111	HHS	Active	20

**Review Employee Folder**

26. On the Review folder page, the HR specialist must ensure that the employee folder is complete and that all documents that will transfer are indexed correctly.

27. All forms that will transfer are automatically selected based on the Master Forms List (MFL). The “Ready to transfer” column in the document list will inform you of if the document is marked for transfer and if it contains any indexing errors. See below for a breakdown of the icons you will see in the “Ready to transfer” column:

- ✔: This indicates that the document is marked for transfer and is ready to transfer.
- ⚠: This indicates that the document is marked for transfer but contains an indexing error and will need to be reindexed. (See [Reindexing documents with errors](#) for more information)
- ⓧ: This indicates that the document is not marked for transfer and will be deleted at time of transfer.

28. Once all documents are ready for transfer, press the **Confirm Documents For Transfer** button.

29. A list of only the documents that will transfer will display. Confirm the documents are correct then press **Transfer** or go back to continue making edits.

< **Documents Selected For Transfer**

The following documents will be transferred. Documents are automatically selected for transfer and cannot be unselected.

[Transfer](#)  
[Back](#)

**▲ If you have any employee documents that should be transferred but are not identified, please follow these steps:**

1. Proceed with the transfer of the selected documents.
2. Send the document(s) via email or mail to the Gaining Agency or NPRC, outside of the Employee Personnel Folder. Update the transfer request notes with details about the non-identified documents submitted.
3. Contact your Account Manager to start the adjudication process for identifying the form(s) for transfer on the Master Forms List.

NAME	POID	AGENCY
Braune, Henry G.	4152	BUREAU OF ALCOHOL, TOBACCO, FIREARMS, AND EXPLOSIVES

FORM	NOA CODE	NOA CODE 2	SOURCE	FOLDER SIDE	EFFECTIVE DATE	CREATE DATE
<input checked="" type="checkbox"/>	SF 1126		National Personnel R...	Permanent	2025-04-18	2025-04-18

30. Note: this page also contains instructions on what to do if you think there are documents that should be transferred:

4. Proceed with the transfer of the selected documents.
5. Send the document(s) via email or mail to the Gaining Agency or NPRC, outside of eOPF. Update the transfer request notes with details about the non-identified documents submitted.
6. Contact your Account Manager to start the adjudication process for identifying the form(s) for transfer on the Master Forms List.

31. Read and agree to the two acknowledgements that appear on the screen then press [Complete Transfer](#).

< **Complete Transfer**


To complete this transfer, you must check the boxes and confirm the following:

I have reviewed all employee folder documents for completeness and accuracy.

I understand that all documents that are not auto-selected for transfer will be deleted. Deleted documents can be restored for 120 days by returning to the employee's folder.

[Complete Transfer](#) [Return To Employee Folder](#)

32. A confirmation message will display, and the request will appear in the “History” tab of the task list. (See [Task list](#) for more information)

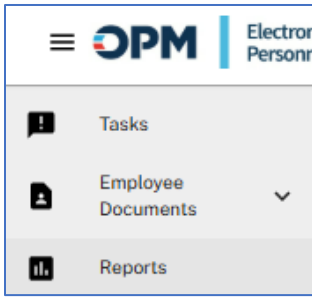
 You have transferred Henry G. Braune's employee folder. [Request #30111](#) can be found on the History tab.

## Reports

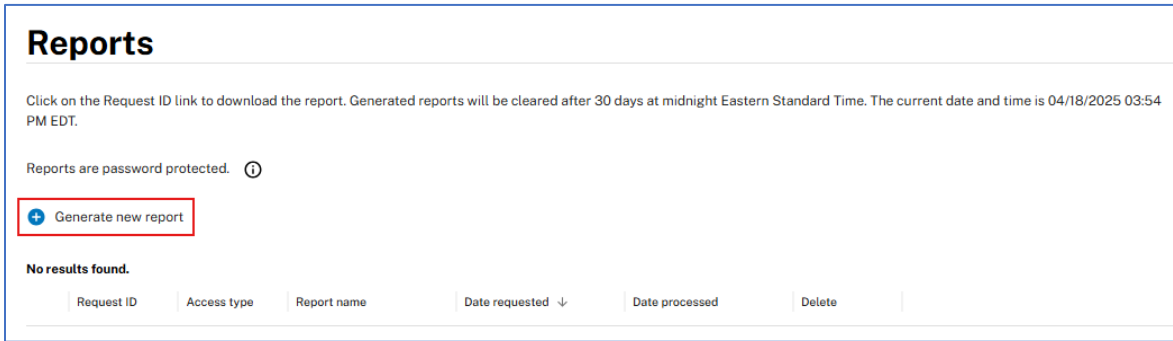
Admins will be able to run the following reports.

- **Transfer report:** This report is designed to show Transfer Activities in the eOPF system.
- **Deleted documents report:** This report is designed to show documents that have been deleted in the eOPF system.
- **Purged documents report:** This report is designed to show purged documents in the eOPF system.
- **Data Feed report:** This report is designed to gather information regarding the form data feed services used by the agency to view a list of successfully processed and failed transactions based on the entered search criteria.
- **Roles and Access report:** This report is used to show users' Role(s) and additional Access Rights assigned to user(s) in eOPF system.

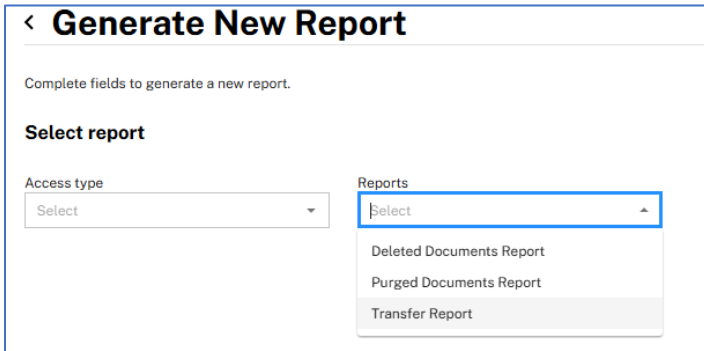
6. Navigate to the “Reports” tab in the left-side navigation.



- The Reports page will display a grid of all pending and processed reports. The reports are cleared after 30 days at midnight EST. Click on the “Generate new report” button.



- Select an “Access type” and then a report from the “Reports” dropdown. Selecting a report will also automatically populate the “Access type”



- Selecting a report will populate the “Reports description” and the corresponding reports filters will display. Fill out the filters as needed then press **Generate Report**.

## < Generate New Report

Complete fields to generate a new report.

**Select report**

Access type: Document Access X

Reports: Transfer Report X

**Report description**  
This report is designed to show Transfer Activities in the eOPF system.

---

**Apply Filters**

POID: Select

Owner's SSN: [Redacted] [Refresh]

Date: From: MM/DD/YYYY

Date: To: MM/DD/YYYY

Transfer Activity: Select

- You will be taken back to the Reports page and a confirmation message will display. Reports that are not ready to be downloaded will display “Pending” in the “Date processed” column.

## Reports

✓ The report has been requested successfully X

Click on the Request ID link to download the report. Generated reports will be cleared after 30 days at midnight Eastern Standard Time. The current date and time is 04/18/2025 04:02 PM EDT.

Reports are password protected. ⓘ

[+ Generate new report](#)

1 results returned of 1

Request ID	Access type	Report name	Date requested ↓	Date processed	Delete
<a href="#">10054</a>	Document Acc...	Transfer Report	04/18/2025 04:02 PM EDT	Pending	X

Rows per page: 5 1-1 of 1 < >

- Refresh the page using the Refresh button in your browser to update the reports grid.
- When the report is done processing, click on the Request ID link to initiate the download.

Request ID	Access type	Report name	Date requested ↓	Date processed	Delete
<a href="#">10054</a>	Document Acc...	Transfer Report	04/18/2025 04:02 PM EDT	04/18/2025 04:02 PM EDT	⊖

- When opening the downloaded file, you will be prompted to enter a password.
  - Note: The password is a combination of the requesting user’s birth year and the Request ID. For example: 1980100

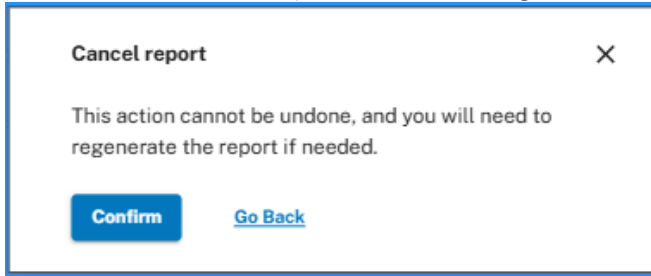
Password required

This document is password protected. Please enter a password.

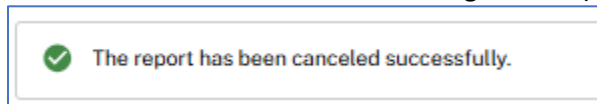
[Submit](#)

### Canceling a report

14. If a pending report is no longer needed, click the × icon to cancel the report.
15. The pop-up modal below will display, giving you the option to confirm or cancel the action. Note that this action cannot be undone, and you will need to regenerate the report if needed.

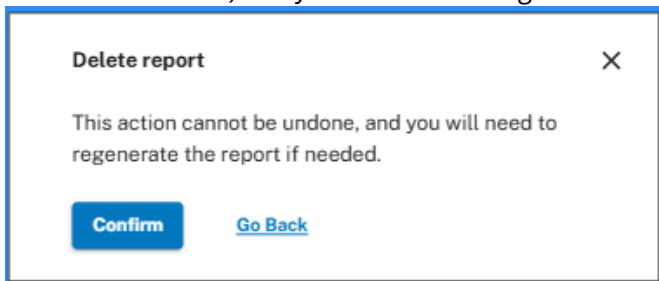


16. Once confirmed, a confirmation message will display and the report will be removed from the grid.

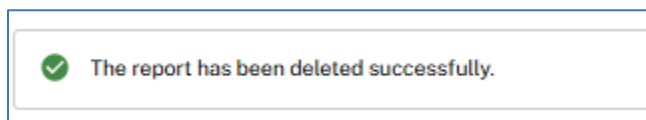


### Deleting a report

17. If a report is no longer needed, click the ⊖ icon to delete the report.
18. The pop-up modal below will display, giving you the option to confirm or cancel the action. Note that this action cannot be undone, and you will need to regenerate the report if needed.

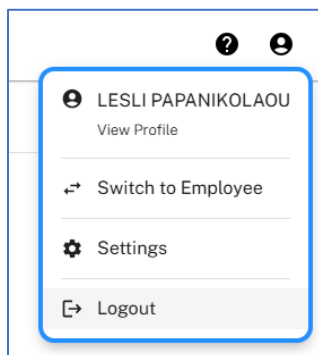


19. Once confirmed, a confirmation message will display and the report will be removed from the grid.



## Logout

1. When you are ready to log out of the system, select the profile icon in the top-right corner of the screen and select the "Logout" option.



6. The system will return to the login screen, confirming logout.

