



**eOPF**

## **Resource Guide**

Importer

# Importer 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 the Importer role. The Importer role allows individuals to import Portable Document Format (PDF) documents into eOPF using the Add Document functionality. Individuals assigned the Importer role cannot search for or view documents in an employee's eOPF.

## Basic Features of Import

The Importer role accommodates users who require only the capability to import documents into eOPF, but who do not need the ability to otherwise view or manage the folder. These users must be assigned to the Importer Role.

- The Importer role can only import documents into eOPFs to which they have been assigned access.
- The Today's Summary lists all documents imported by the user that day (work performed by other users does not display). Users can access the Today's Summary tab to check their activity for the day, as well as to verify and validate their work.
- Assure all documents are in PDF format. Only PDF documents can be imported. The document must be converted and saved as a PDF.
- Remove all passwords. The eOPF Import function cannot open or upload password protected PDF files.

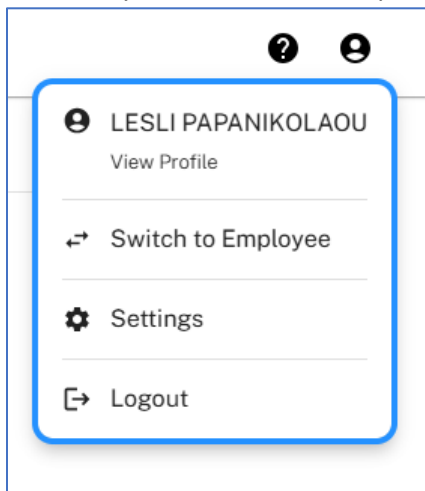
## Introduction to eOPF

See the **eOPF Employee Reference Guide** in 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.

< **User Profile: Papanikolaou, Lesli T.**

### Personal Information

<b>LAST NAME</b> PAPANIKOLAOU	<b>FIRST NAME</b> LESLI
<b>MIDDLE NAME</b> TORRI	<b>SUFFIX</b>
<b>BIRTH DATE</b> **/**/**** <a href="#">Show</a>	<b>SSN</b> -----6837 <a href="#">Show</a>
<b>FOLDER TYPE</b> Standard	

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

### Contact Information

<b>ADDRESS (HOME)</b> 700 US HIGHWAY 441 Suite 4530 FARGO, GA 31631 UNITED STATES	<b>EMAIL</b> LESLI.PAPANIKOLAOU.0207@notARealEmailService.gov
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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

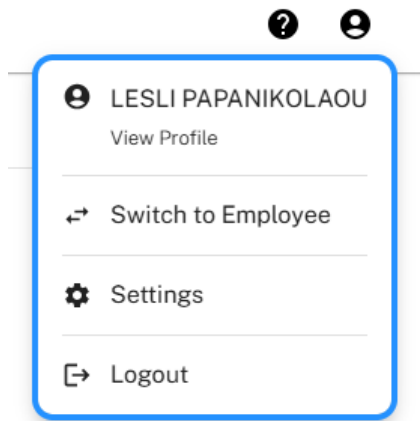
**TOTAL LOGIN COUNT**  
20


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.

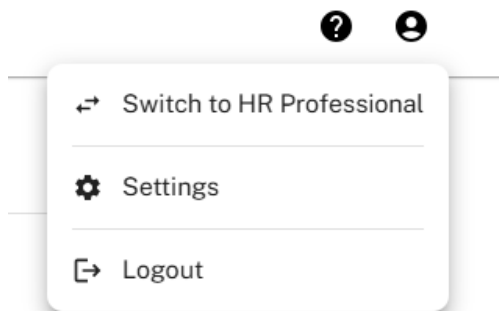
## Toggle to Employee View

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"



## Employee Folder Search

The following steps identify the process to add a document to an existing folder using the Importer Role.

3. On the eOPF Welcome page, click on the Employee Documents tab in the left-hand navigational menu.



- From the Employee Folder search, enter the employee information for the folder the document will be imported to by entering data in any of the available search fields. It is recommended to search by SSN. Double click the name of the employee in the search results.

### Employee Folder Search

Search federal employee information to find available employee folders.

SSN  Employee ID

Last Name  First Name

POID  ORG CODE

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

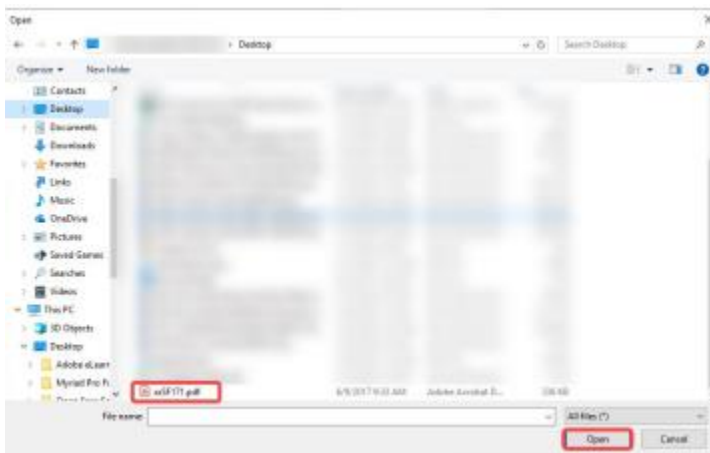
Note: A search for an employee outside of assigned access will result in a “No results found. Try a different search” message.

## Importing Documents

Click  icon to add/import the document.

### Choose File to Upload

- A dialog box displays. 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.

Employee Documents  
Today's Summary

## Documents for: BARKEN, AILENE

1 of 14

Selected File [Change File](#)

SF 2809.pdf

Must index before saving.

NAME  
AILENE.BARKEN

EFFECTIVE DATE  
01/21/2025

FORM  
FORM

TYPE

FOLDER SIDE  
FOLDER SIDE

NOA CODE 1

NOA CODE 2

RETENTION DATE  
MM/DD/YYYY

COMMENT

SAVE CANCEL RESET

## Complete the Indexing Information

1. In the Effective Date field enter the date to match the effective date of the document.
2. Select the Form Number from the drop down.
3. Select NOA Code 1 and NOA Code 2 if applicable.
4. Enter a Retention Date and Comment if applicable.
5. Click **SAVE** to proceed with importing the document.
6. 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](#)

✕

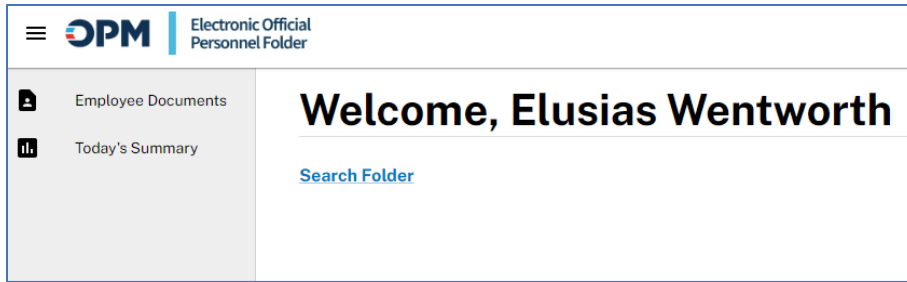
## Using The Today's Summary Tab

The Today's Summary page lists the import activity on the day it occurs. The system removes the list nightly at midnight Eastern Standard Time. Documents loaded by other users do not display.

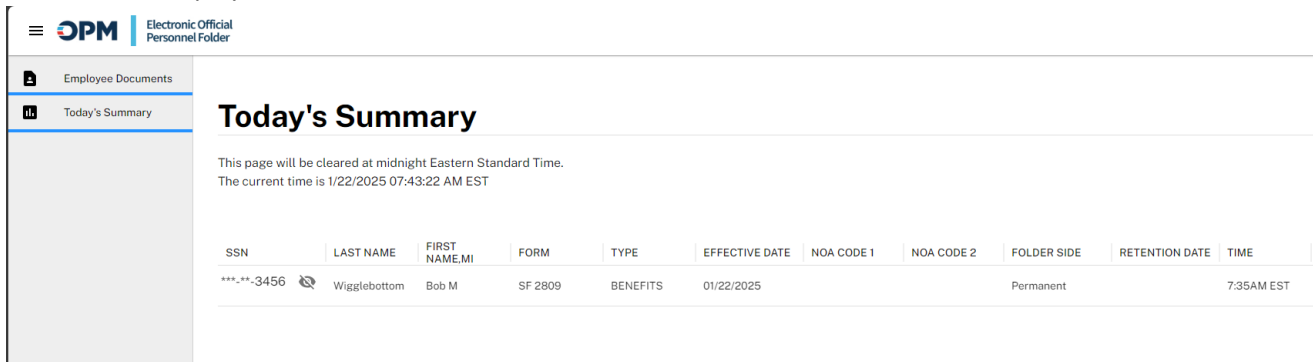
Use the information on the Today's Summary tab to:

- View and print a record of productivity for the day
- Verify the image quality of the document, and
- Confirm that the indexing information is consistent with the documents that were imported.

1. From the eOPF Welcome Page, select Today's Summary

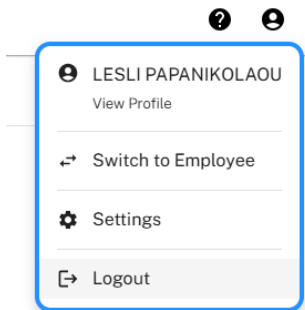


2. The Today's Summary displays showing details associated with documents imported today only. Note: Import activity is only maintained for the day the import takes place. Information listed on the Today's Summary tab is cleared nightly. Results are limited to only those documents which the user has imported; documents imported by other users do not display.



## 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.



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

