

Agency Touchpoint

eOPF PMO

March 25, 2026



Agenda

- Welcome and agenda review (4 minutes)
- Federal HR 2.0: Core HCM update (9 minutes)
- Agency feedback & survey insights (10 minutes)
- How Feedback drove improvements (5 minutes)
- Customer experience & resources (5 minutes)
- Enhancements and Product Updates (9 minutes)
- Training and Adoption (8 minutes)
- Employee folder view (6 minutes)
- Open Q&A Discussion (20 minutes)
- Closing (3 minutes)

Welcome To The eOPF User Community



Federal HR 2.0: Core HCM

Michelle Earley

Driving Federal HR modernization through Core HCM – Guiding Principles

Vision: Implement Core HCM across the Federal Government civilian labor force to more effectively manage the federal workforce as a unified entity.

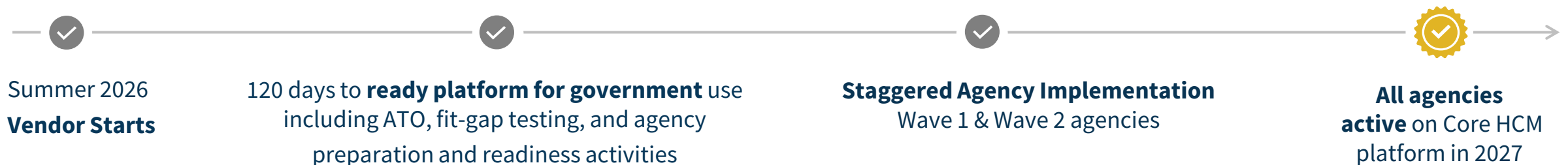
OPM’s Role as Integrator

- **Single Core HCM contract** for government-wide, non-IC civilian use, including the full range of federal titles (Title 5, Title 38, etc.)
- **Licenses via IAA** with OPM
- **Compliance and security** with single ATO (Agencies do not require their own ATO)
- **Implementation and change management** support

Government-wide Standardization

- **One version** of Core HCM for all agencies
- **Configuration-first approach** limits customization
- **Alignment with policy and processes** to evolve standards with technology advancement
- **Governance** for consistency and data integrity

Agency Transition Timeline (Subject to Change)



Summer 2026
Vendor Starts

120 days to **ready platform for government** use including ATO, fit-gap testing, and agency preparation and readiness activities

Staggered Agency Implementation
Wave 1 & Wave 2 agencies

All agencies active on Core HCM platform in 2027

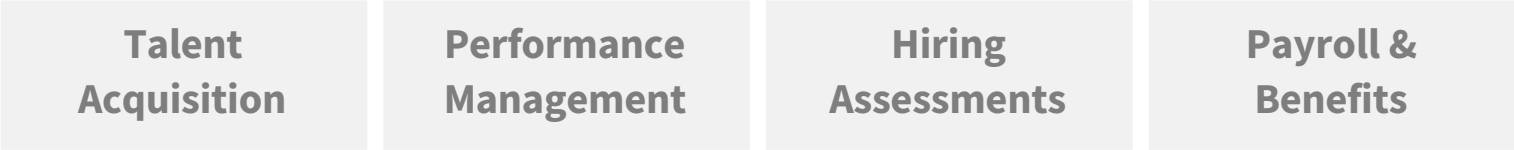
Core HCM Scope

In scope:



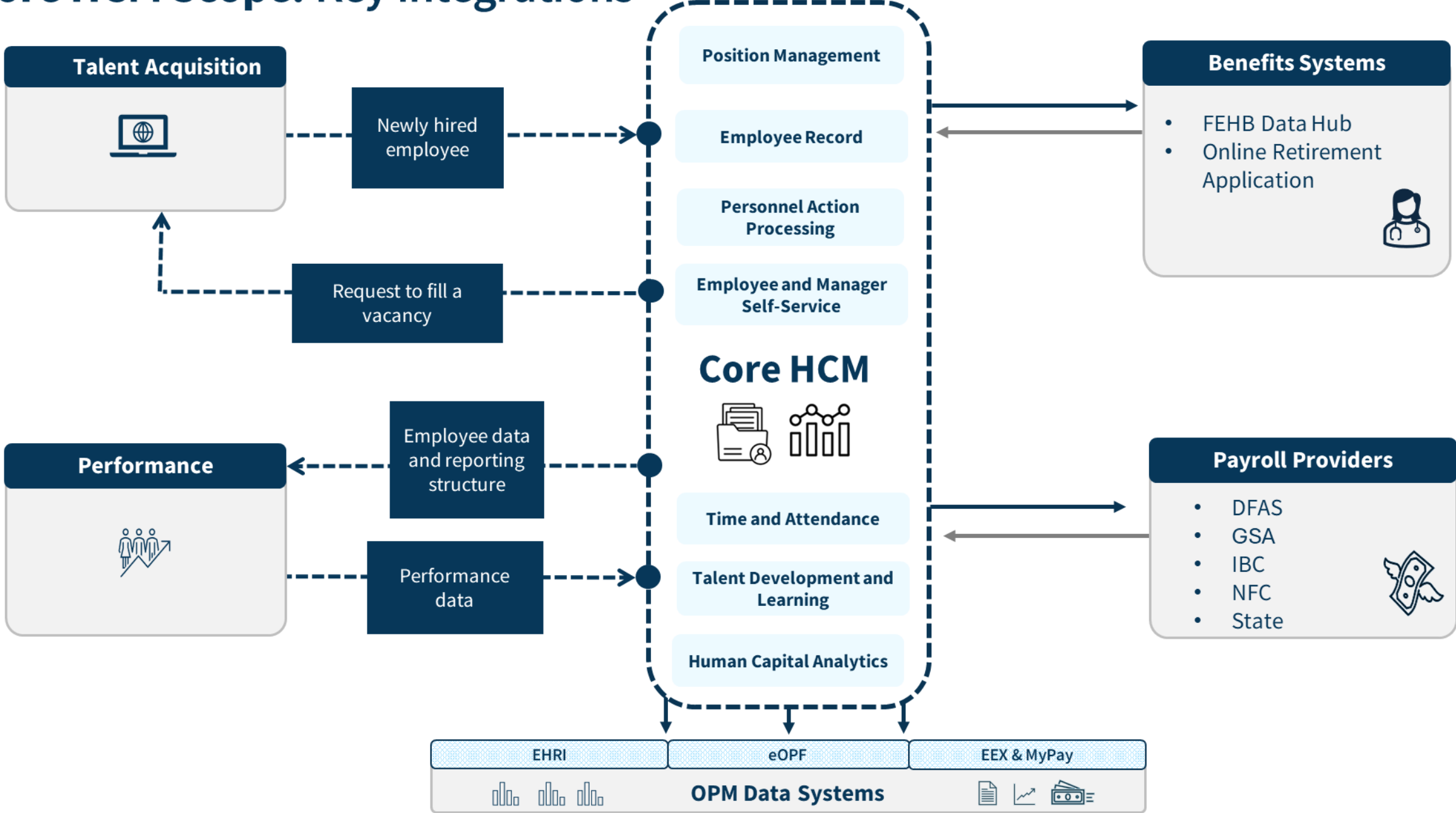
Integration with payroll and talent management systems

Out of scope:



* Denotes functional area of Human Capital Business Reference Model (HCBRM)

Core HCM Scope: Key Integrations



Core HCM: Shared benefit across government

Implementing a government-wide Core HCM system will allow the government to manage the federal workforce as a **cohesive entity**, driving **efficient workforce management** and enabling more **effective oversight**.

Shared Benefit	Government-wide Impact	Agency Impact
Innovation and Modernization	Incorporate cutting-edge industry innovations , including Agentic AI, to drive efficiency and modernization	A modern, intuitive platform for employees and managers
Streamlining and Standardization	Reduce duplication by consolidating 100+ Core HCM systems across the federal government	Streamline and standardize HR operations
Improvement of User Experience	Enable seamless employee transfers between agencies	Enhance self-service capabilities and reduce administrative burden
Data optimization	Support government-wide analytics and reporting through consistent data standards Manage the federal workforce as a cohesive, data-driven enterprise	Centralize workforce data to reduce ad hoc data calls and improve decision-making Improve transparency, efficiency, and accountability in HR processes
Cost savings	Achieve cost savings by leveraging centralized investments and shared capabilities	Reduce costs associated with maintaining multiple Core HCM systems

Help Us Serve You Better
Derek Parker

Five Survey Questions Were Asked



What are we doing well?



What is one specific improvement that would make the biggest difference for your agency?



What barriers are you facing in implementing current OPM personnel recordkeeping standards?



Name two to three topics on which your agency would like updates.



Name two to three topics on which your agency would like updates.

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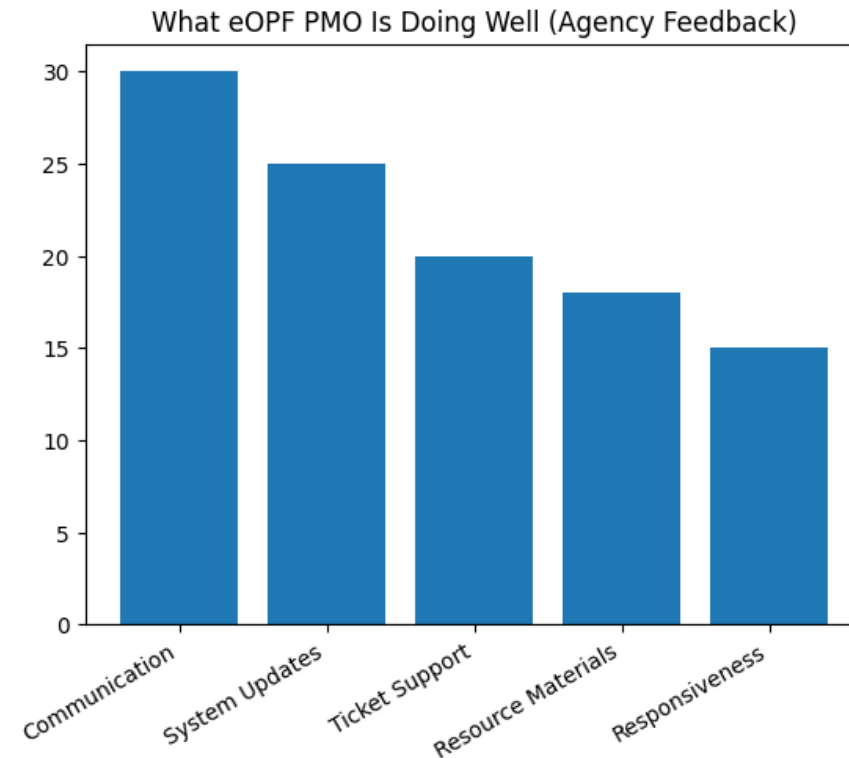
Responses

22.9%

Response Rate

What's Working

- Strong communication from eOPF PMO
- Timely system updates and notices
- Transparency during issues
- Processing Speed
- Better Document Management

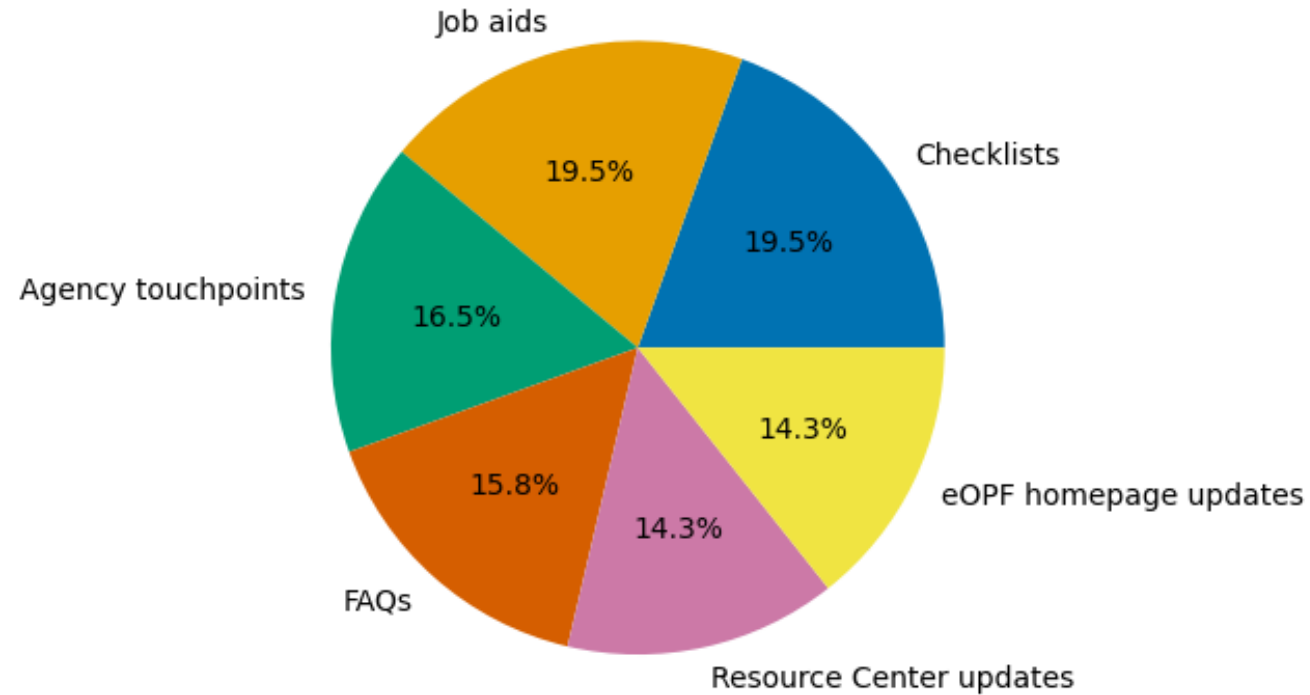


Trend

- Agencies generally feel that communication and updates from the PMO are strong.

Preferred Communication Formats

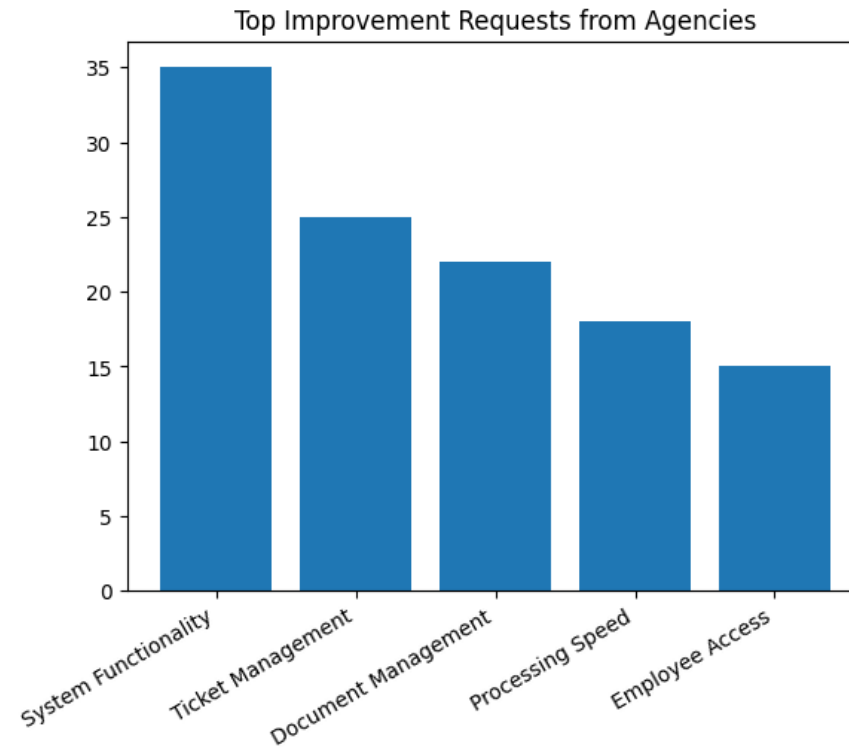
Preferred Communication Formats (Survey Results)



“Over 60% of agency preferences are concentrated in **checklists, job aids, and Agency Touchpoints**—highlighting a strong demand for practical, operational guidance.”

What Needs Improvement

- eOPF Functionality
- Ticket Management / Resolution
- Ticket Responses
- Processing Speed
- Better Document Management

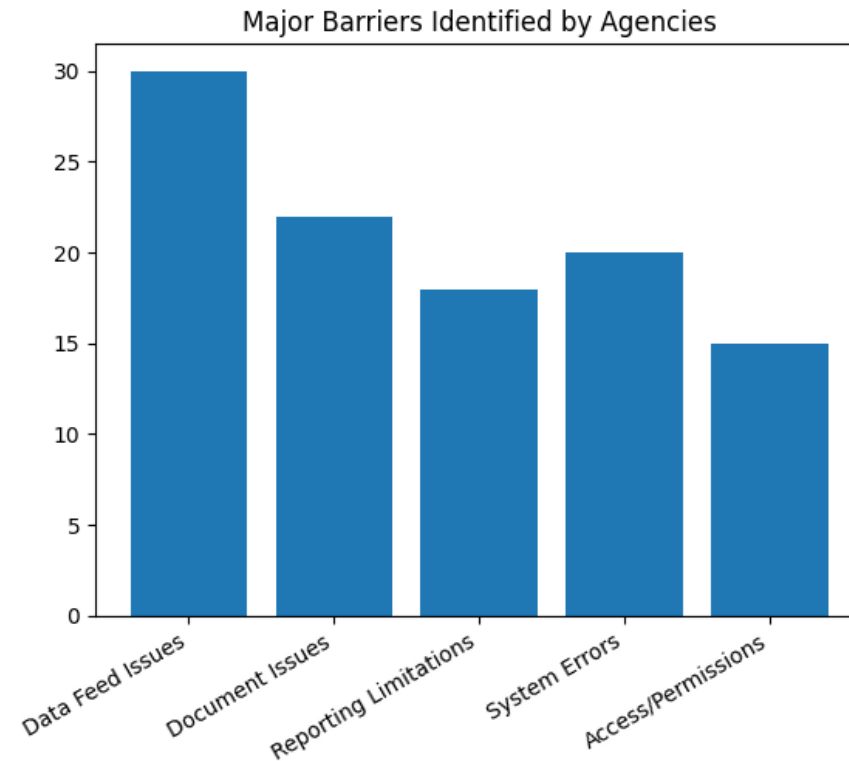


Trend

Agencies want operational improvements within the system, not just communication improvements.

Top Barriers Agencies Face

- Data Feed Problems
- Document Handling
- Reporting limitations
- System issues



Trend

The biggest barrier cluster relates to **data integration and reporting capabilities.**

Crosswalk Analysis

Derek Parker

How Agency Feedback Drove eOPF Improvements (January – March 2026)

Feedback

Reliability and Stability

Action Taken

- Improved data feed processing
- Resolved print job delays

Result

- Fewer failures, smoother processing

Feedback

Accuracy & Visibility

Action Taken

- Correct document placement
- Enhanced reporting
- Added transfer tracking

Result

- Better tracking and transparency

How Agency Feedback Drove eOPF Improvements (January – March 2026), Pt. 2

Feedback

- Usability & Administration

Action Taken

- Clearer error messages
- Easier template configuration
- Reduced admin errors

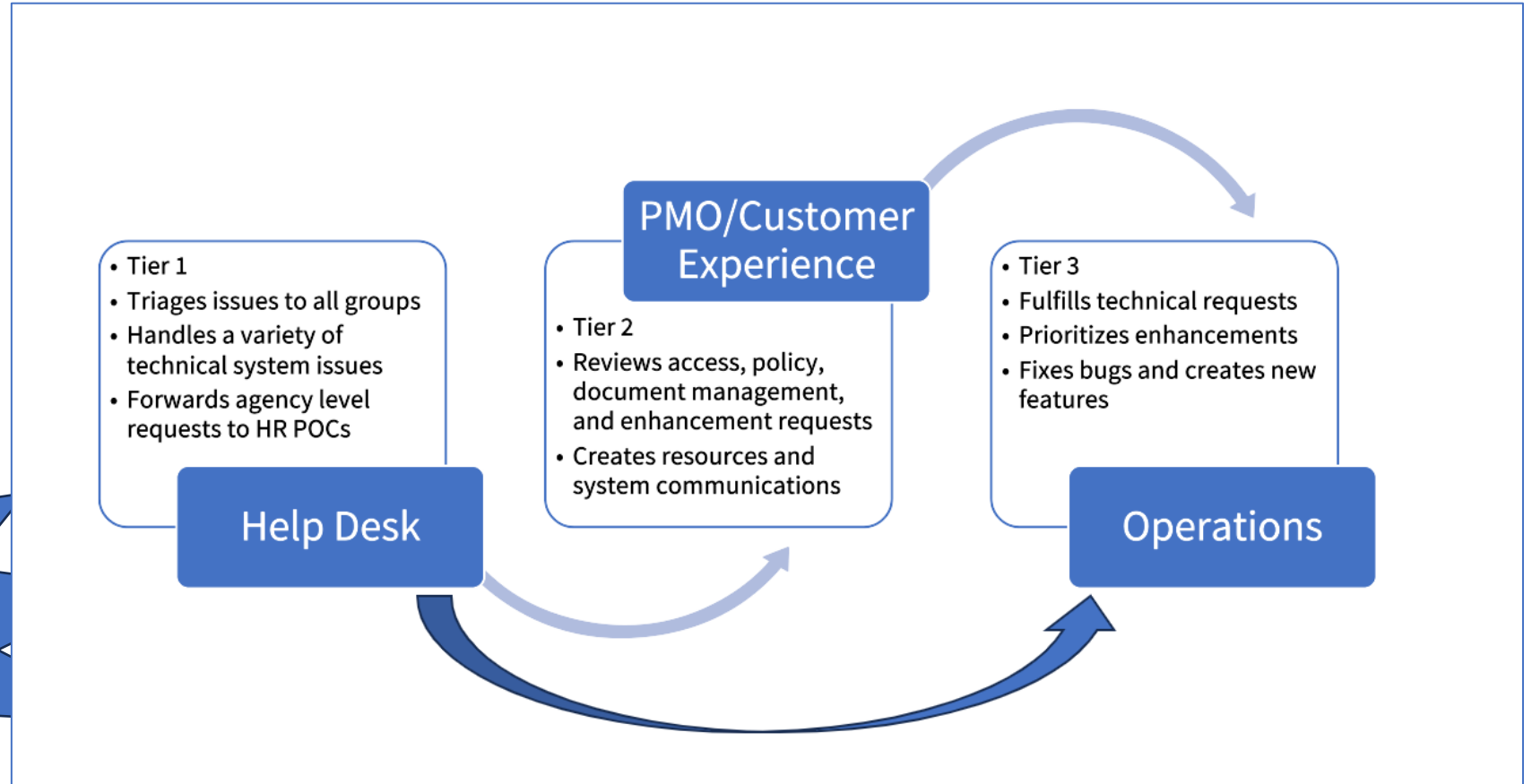
Result

- Fewer workflows, less confusion

Customer Experience: Christina Holcomb

Communications and Resources

- Ticket responses
- Communications
- Release Notes
- Resources



We are exploring a solution for easier ticket management

Communications and Resources, Pt. 2

OPM | eOPF Resource Center

Electronic Official Personnel Folder Resource Center

Search

Information Areas

- Getting Started with eOPF
- eOPF Community Updates**
- Data Feeds
- eOPF Policies
- Training

External Links

- OPM.gov - U.S. Office of Personnel Management
- Enterprise Human Resources Integration - EHRI
- National Archives - NPRC

Contact eOPF Help Desk

Email the eOPF Help Desk

Promoted articles

- Known Issues - Release 3/19/2026
- Known Issue: eOPF Automated 120-Day Purge Not Functioning - Manual Purge Recommended

Communications and Resources, Pt 3.

eOPF Community Updates

Agency Touchpoint Meetings

Agency Touchpoint Meetings are held quarterly. Presentation Slides and Q&As are updated every quarter.

[Agency Touchpoint - December 2025](#)

[Agency Touchpoint Q&A - December 2025](#)

[Agency Touchpoint - September 2025](#)

[Agency Touchpoint Q&A - September 2025](#)

Known Issues

★ [Known Issues - Release 3/19/2026](#)

★ [Known Issue: eOPF Automated 120-Day Purge Not Functioning - Manual Purge Recommended](#)

Release Notes

eOPF Release Notes give you a brief update each month on system improvements, new features, and fixes. These summaries help you understand changes that may affect how you use eOPF.

[March 2026 eOPF Release Notes](#)

[February 2026 eOPF Release Notes](#)

[January 2026 eOPF Release Notes](#)

[December 2025 eOPF Release Notes](#)

[November 2025 eOPF Release Notes](#)

[October 2025 eOPF Release Notes](#)

[See all 9 articles](#)

Communications and Resources, Pt. 4

eOPF Resource Center

Some survey responses were requests for currently published information:

- Standardized processes and steps within eOPF > Getting Started with eOPF
- Transfer processes > Getting Started with eOPF
- What we can create
 - Foundational information on eOPF, e.g. purpose, usage, Effective vs Created Date
 - Videos
 - "More resources" > tell us!

Enhancements and Bug Fixes

Drew Matthews

New Release: Employee Folder Search Enhancement

This enhancement is intended to improve search flexibility, increase user self-service, and provide capabilities for some custom reporting requests.

We are aware that this functionality has some known bugs and are working on a priority fix.

- Employee Folder Search now has the following **NEW** search filters:
 - Agency Subelement
 - Contains Form Type
 - Create Date From
 - Effective Date From
 - Effective Date To
- Replacement of the “Include inactive employees” checkbox with a Folder Status dropdown:
 - Show all
 - Show active only
 - Show inactive only
- Update to the Employee Folder Search results grid with the updated filters
- Ability to export search results to a CSV (Excel-compatible) file

Upcoming Enhancement: Foreign Nationals in eOPF

- Enable agencies to create and manage Foreign National user accounts without requiring an SSN
- Eliminate use of inconsistent or manually created “dummy” accounts
- Provide a system-generated unique identifier for Foreign National users
- Foreign National user’s permissions currently will be restricted to HR Document Management, HR Viewer and Importer
- Ensure audit tracking of Foreign National access activity
- Break-in-service behavior will result in a new account rather than a continuation of the previously assigned system-generated identifier
- Foreign National user will not have a folder in eOPF (same as contractor)

Additional Enhancements

- Form description displays in the index panel when adding or modifying document
- Roles dropdown updated in User Profile to better reflect current roles and hierarchy
- Ability to auto scroll to document in employee folder
- Transfer email notification update to include additional details such as Transfer Request ID, POID, Org Code, Activity Code and Agency Name
- Additional columns added to the Document Report including DocumentID, Form Name, Effective Date, NOA Code (if form is NOAC Enabled) and Folder Side
- Employee view – Document grid will now have Form Description and NOA Code 1 columns added, and the Form Type column will be removed
- Ability to auto-scroll to the document preview when a document is selected in the employee folder
- Update Employee view to display 'What's New' as a banner and fix document grid issues

**Topic: Personnel Recordkeeping
Training Course
Matthew Rozzero**

Course Overview

This **4-hour training** provides participants with essential guidance on **personnel recordkeeping** as it relates to the **Official Personnel Folder (OPF)**. Participants will gain valuable insights into policies and best practices to ensure **accurate and compliant recordkeeping** across all stages of the employee lifecycle.

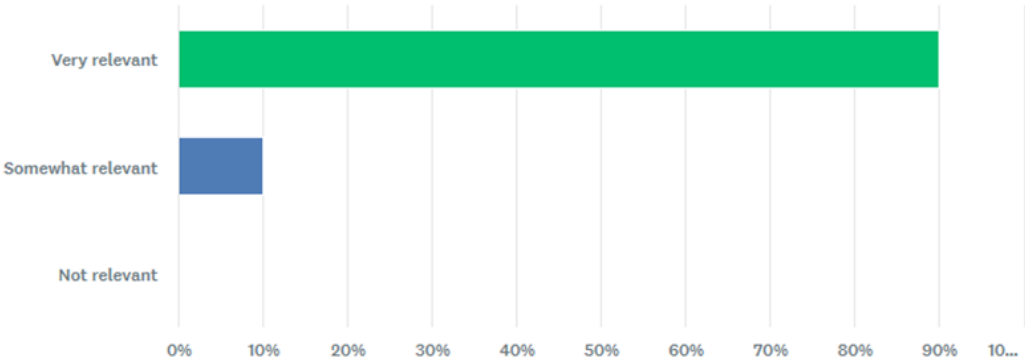
By the end of the course, participants will be able to:

- Describe the importance of accurate personnel recordkeeping
- Identify key roles, responsibilities, and guiding documents
- Differentiate between types of personnel folders (Standard and Merged)
- Determine which documents belong in a personnel file and whether they are temporary or permanent
- Outline the steps for establishing, maintaining, and transferring personnel folders
- Access and apply policy and system resources for folder management

Course Feedback/Survey Results

How relevant was the training content to your job responsibilities?

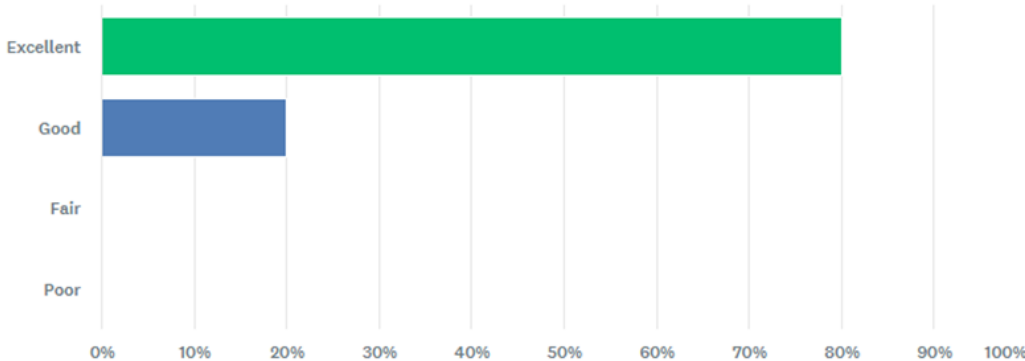
Answered: 20 Skipped: 0



Answer Choices ↓	Percentage ↓	Responses ↓	
Very relevant	90.00%	18	...
Somewhat relevant	10.00%	2	...
Not relevant	0%	0	...
Total		20	

How would you rate the overall quality of the training session?

Answered: 20 Skipped: 0

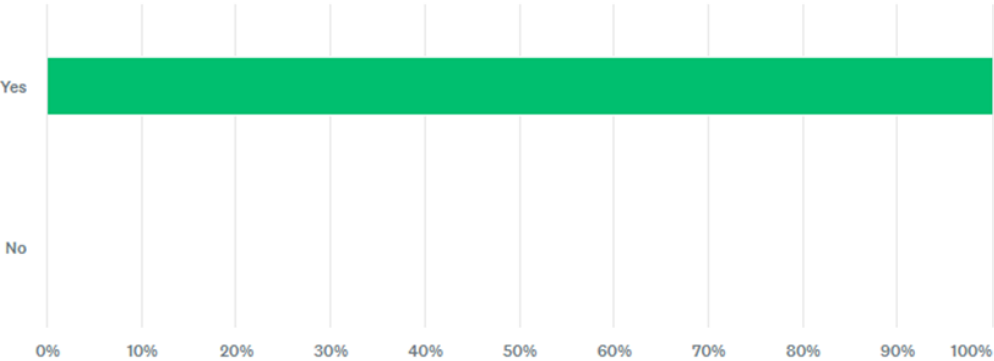


Answer Choices ↓	Percentage ↓	Responses ↓	
Excellent	80.00%	16	...
Good	20.00%	4	...
Fair	0%	0	...
Poor	0%	0	...
Total		20	

Course Feedback/Survey Results

Would you recommend this training to your colleagues?

Answered: 20 Skipped: 0



Answer Choices ↓	Percentage ↓	Responses ↓	
● Yes	100.00%	20	...
● No	0%	0	...
Total		20	

-A total 379 participants attended the 6 courses offered from January-March 2026.

-Participants come from 60 + agencies.

eOPF Employee Folder View

Thomas Merz

Employee Folder View

- Employee folder view – Current feature in modern eOPF application
- Single instance concept
 - One SSN
 - One account
 - Employment line for each past & present employment
- Can see all documents in these folders across the eOPF system
 - Permanent
 - Temporary
 - Performance
- Cannot see documents in the iAPF folder*

Employee View



**Basic
Employee User**

OPM
Prior Employment

NASA
Current Employment

NPRC
Archive

HR User View

- Employing agency has custody of folder in their possession
- Can only see folders/documents at the current employing agency
- Can only see/access folders where permissions allow
- Cannot see folders/documents that are with other agencies or NPRC
- Can see documents in the employee iAPF folder*

HR View



HR User



OPM
Prior Employment

NASA
Current Employment

NPRC
Archive

Folder View-Notes

- Employee may be able to see more documents in folder than HR
- HR may see less documents than employee
- iAPF folder documents can only be seen by HR
- Not all employees have an iAPF folder with documents
- Ideal circumstances:
 - Agencies expeditiously conduct transfer activities
 - All documents consolidated into one folder at present agency
 - Loosing agency purges all remaining temporary records

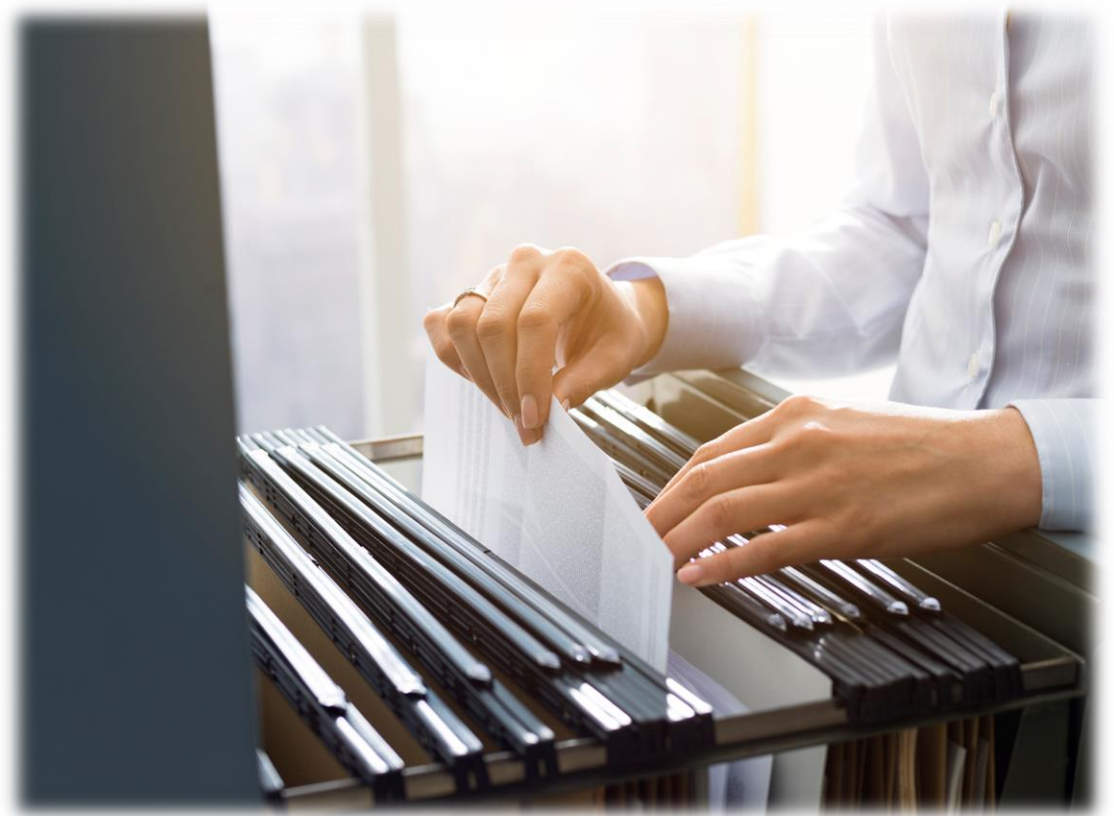
**Topic: Personnel Records
Management in OPM eOPF system
Ismael Ruiz**

Subtopics

- Updated guidance for EOD → eOPF transmission
- Defines authorized records
- Clarifies filing rules
- Highlights upcoming changes
- More detailed information provide in the appendix

Authorized Record Categories

- Ch 3 OPM Guide to Personnel Recordkeeping identifies the personnel records that are authorized for the OPF
- Core EOD documents and DG form listed in the Appendix will be authorized for transmission to OPM eOPF



Agency-Specific Records

- Agency temporary records require cutoff date
- Date to be determined with EOD system offices
- Consult EODS system program office for Core EOD document equivalents
- Coordinate early



Transmission Timing Requirement

- Send only after folder is visible
- Early transmission causes errors
- Creates system issues
- Increases support workload



Reinstated Forms

- DG 05 – Education / Licenses
- DG 39 – Disability Rating
- Authorized under specific conditions



Education & License Rules



- Allowed when part of qualifications as defined by OPM
- Used for substitution for specialized experience
- Not allowed for selective factors alone

SF-15 Derived Preference

- Attach supporting documents to the SF-15 signed by the applicant/employee
- Do NOT file separately
- Redact PII and health data of the veteran
- File as one record



Veteran as Applicant or the Employee

- Documents may be standalone
- No PII redaction required
- Health data must still be redacted
- Attach disability retirement orders to DD 214



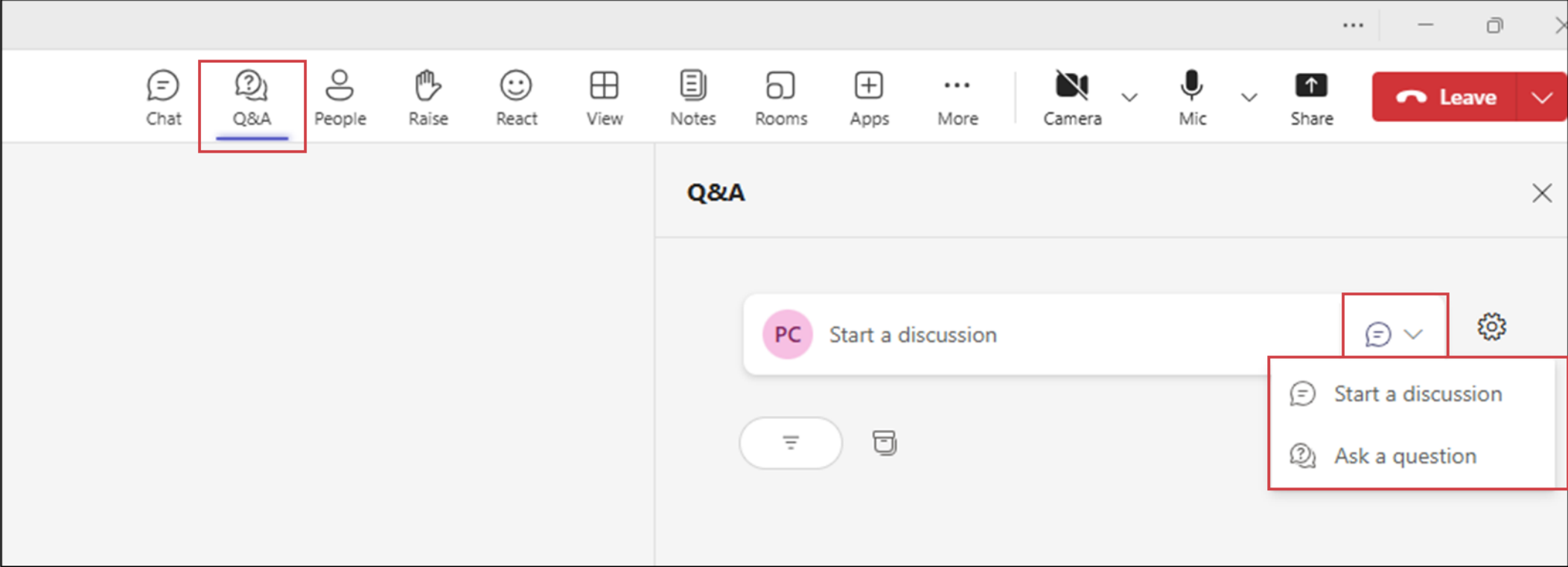
electronic Employee Medical Folder (eEMF)

eEMP basics

- Access: Employee, HR Admin, Medical Officer
 - HR Admin and Med Officer role can add, delete, and modify document in the eEMF
- Medical Officer role has no access to other record types
- Only long term medical records authorized
- No added transfer burden

Questions

Using The Q&A Feature In Team



Questions?



Next Agency Touchpoint

Date: June 24, 2026

Time: 2:00 PM EST



Thank you

Appendix

Survey Feedback vs eOPF Improvements

Survey Theme	Agency Feedback	eOPF Enhancement / Fix	Impact	Remaining Gap
Data Feed Reliability	Troubleshooting failed records and feed errors	XML record number visibility for providers	Improves troubleshooting and record traceability	Monitor provider feed reliability
Data Feed Reliability	File processing and stability issues	File processing improvements preventing size errors	Improves system stability and feed reliability	None identified
Document Management	Document placement and folder issues	NOA code logic aligns documents with correct folders	Improves document accuracy	None identified
Document Tracking	Need better visibility into document actions	Deleted Documents Report expanded fields	Improves audit visibility	Additional reporting may be beneficial

Survey Feedback vs eOPF Improvements, P2

Survey Theme	Agency Feedback	eOPF Enhancement / Fix	Impact	Remaining Gap
System Usability	Confusing validation and error messages	Bug fixes for POID/Subelement validation and templates	Reduces user confusion	Monitor user feedback
Access Templates	Difficulty configuring exclusions	Template exclusions allow Org Code OR SSN	Simplifies template management	None identified
Access Templates	Duplicate row and saving issues	Bug fixes for exclusion rows and duplicate validation	Improves template reliability	None identified
System Processing	Print jobs stuck in processing	Bug fix for pending print jobs	Improves processing reliability	None identified

Survey Feedback vs eOPF Improvements, P3

Survey Theme	Agency Feedback	eOPF Enhancement / Fix	Impact	Remaining Gap
System Processing	Backlogs from stalled print jobs	Automatic removal of stalled print jobs	Improves workflow efficiency	None identified
Transfer Processing	Need clearer transfer information	Transfer emails include Request ID, POID, OrgCode, Activity Code	Improves transfer coordination	None identified
Training Resources	Request for job aids and checklists	No system enhancement	N/A	Opportunity for PMO training resources
Help Desk	Need better ticket visibility	Feedback streamlined to eOPF Help Desk	Clarifies support channel	Opportunity to review help desk communication

Training Topics Agencies Want

Top training interest areas:

Topic	Signal
eOPF System Functionality	Most frequent
Reporting Capabilities	Strong interest
System Updates/Changes	Repeated requests
Data Management	Recurring
Ticketing and Issue Resolution	Mentioned several times

Trend

Training demand is operational and system-focused, not policy-focused.

Reducing records authorized for transmission from EOD systems to OPM eOPF

The following list represents the records that will be allowed to be transmitted from an EOD system to OPM eOPF:

- DD 214 and DD 215
- SF 15
- SF 61
- SF 75
- SF 144
- SF 144A
- DG 04 Cert of Investigation (adjudication)
- DG 05 Edu Transcripts/Prof. Lic-Certificate
- DG 10 Demo Proj Exit Grade and Pay
- DG 14 Vol Chg to non-Car/Limit Appt outside of Vacancy annc/Referral Cert
- DG 15 Resume/Application
- DG 30 Proof Select Svc Registration
- DG 37 SES Career Appointee
- DG 38 Vol Leaves Comp Svc for Excepted Svc
- DG 39 Service-Connected Disability Rating
- DG 82 Retirement Coverage Determination
- OF 306
- SF 2809 *
- SF 2817*
- TSP 1*

* will be allowed from EOD systems but plan to discontinued transmission by the end of FY 26.

Reducing records authorized for transmission from EOD systems to OPM eOPF (continued)

- OPM eOPF PMO will work with EOD systems to establish a cutoff date for agency specific temporary records. Actual date to TBD.
- Agencies with agency unique equivalent to SF 61 or other core EOD form should consult the USAS office.
- Reminder to all agencies that agency HR Specialist should not transmit EOD documents until the employee folder is visible to the agency.
 - Transmitting the EOD documents to eOPF system prior to the folder availability generates data feed errors that consume technical support staff work hours.
- OPM Guide to Personnel Recordkeeping Ch 3 identifies what is authorized for the OPF

Form DG 05 and DG 39 will be reinstated for use in the OPM eOPF system

- DG 05 will be reinstated as Education Transcript/Professional License-Certificate
 - Education transcripts are authorized for the OPF only when:
 - education is used as substitute for specialized experience and/or
 - education is part of an Individual Occupational Requirement (IOR)
 - Professional License-Certificate are authorized for the OPF only when those are part of an IOR.
 - ADVISORY: Education, Licenses, Certifications as part of selective factors do not grant the authority to file the supporting document in the OPF
- DG 39 will be reinstated as Service-Connected Disability Rating
 - Used as stand-alone record in the OPF for the subject of folder (i.e. the employee) regardless of the level of the rating

When to attach supporting documents to the SF 15 Application for 10-Point Veteran Preference

When the subject of the folder is a relative of a Veteran and is claiming Derived Preference for hiring and/or Reduction In Force procedures:

- Supporting documents used to adjudicate derived preference are not authorized for filing as independent documents and agencies should not index these documents as separate SF 15(s).
- The PII and/or any health information for the actual Veteran must be redacted from the supporting documents used to adjudicate Derived Preference.
- The supporting document(s) used to adjudicate derived preference must be attached to the SF 15 signed by the applicant/employee and filed as a single record using form name SF 15.
- Agencies are strongly encouraged to advise their HR community (especially persons working RIF procedures) of this standard.

When the veteran is the applicant and/or the subject of the Official Personnel Folder

- The veterans' PII does not need to be redacted when the supporting document is filed into the his/her own OPF. However, any health/medical information must be redacted.
- When the veteran is the subject of the folder, the veterans supporting documents used to adjudicate veteran preference, credit for leave accrual, RIF procedures, etc. may be filed in the OPF as independent documents in his/her own OPF.
- Uniformed Military Service component orders placing a person on Permanent Disability Retirement will be attached to the associated DD 214 to be filed/indexed as a DD 214. This includes orders that resolve Temporary Disability Retirement List (TDRL) or service component equivalent to TDRL. The effective date of the DD 214 should always be set to the date of release/discharge from uniformed military service.

electronic Employee Medical Folder (eEMF) planned for the OPM eOPF system

- A useable version is planned for deployment in FY 27, detailed planning NLT Q4 FY26
- What you need to know now:
 - A new role will be created; Medical Officer/Medical Records Specialist.
 - Default access to the eEMF will be limited to the employee, HR Admin, and Medical Officer/Medical Records Specialist
 - Upon deployment, only long-term medical records will be authorized for the eEMF
 - Everyone gets an eEMF but agencies are responsible to ensure that only long-term medical records are uploaded to the eEMF
 - No burden or addition steps in transfer process – content flows with the transfer of the long-term records