

# Robotic Process Automation Request Form

## INSTRUCTIONS

This form allows agencies to request use of a Robotic Process Automation (RPA) solution to interact with eOPF. Once this form is completed and signed, please submit it to the eOPF Help Desk ([eopfhelpdesk@eopf.opm.gov](mailto:eopfhelpdesk@eopf.opm.gov)). For definitions, please reference page 2.

## AGENCY INFORMATION

Requesting Agency/Organization\*

Sponsor Information

Name\*

Phone\*

Email\*

Custodian Information

Name\*

Phone\*

Email\*

## RPA INFORMATION

RPA Software\*

Email\*

Description\* (Please include the purpose and impact of the RPA solution.)

## APPROVALS

By signing below, I understand that as the requesting agency, I will be responsible for ensuring the RPA solution, its actions, and results comply with the eOPF Statement of Service and Rules of Behavior and this RPA Operational Requirements Agreement. OPM reserves the right to terminate this approval at any time.

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Agency Requestor

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eOPF Program Manager

# RPA Operational Requirements Agreement

**Statement of Service and Rules of Behavior.** All RPA solutions are expected to comply with the eOPF Statement of Service and Rules of Behavior. Agencies that administer the RPA solution (requester, sponsor, and custodian) have shared responsibility to ensure the RPA solution consistently conforms to these expectations. Failure to do so will result in immediate termination of approval for all RPA solutions utilized by the agency. If approval for RPA solution is terminated because of noncompliance with Statement of Service or Rules of Behavior, the agency may reapply for authority to use RPA solutions after the agency has demonstrated adequate remediation of the noncompliance infraction(s) and appropriate internal controls to prevent the infraction(s) from occurring again.

**User Accounts.** All user accounts associated with RPA solutions are required to be identified on eOPF's Robotic Process Automation Request Form. This will ensure that each RPA solution's actions are insulated, reportable, auditable, and attributable.

**Credentialing.** All RPA solutions are required to be attended and utilized through the designated custodian's distinct eOPF user account with their official federal email address. No exceptions to this requirement will be granted., credentialed using two-factor authentication. Agencies are expected to ensure their RPA solutions are not operating outside of the custodian's credentialed account.

**Email Address.** All RPA solutions are required to be attended and utilized through the designated custodian's distinct eOPF user account with their official federal email address. No exceptions to this requirement will be granted.

**Recertification.** All RPA solutions will be required to be re-certified annually to remain in use. eOPF may perform internal audits of the RPA solution's actions. OPM retains the right to require more frequent recertification for RPA solutions it deems a critical risk to eOPF, OPM, the federal government, or public trust.

**Termination.** OPM reserves the right to terminate the authority of the RPA solution to operate within eOPF for any reason, to include but not limited to, negatively impacting or degrading eOPF's performance. eOPF may impose limits on the frequency of actions per second. Agencies are expected to notify the eOPF Program Office when an RPA is de-activated.

**Audit and Reports.** OPM eOPF Program Management Office and the supporting staff (Development Ops, Admin Staff) are not committed to providing audit support, performance reports, productivity reports, or activity reports of any kind. Any support provided by OPM eOPF PMO and support staff is strictly based on available resources (if any) and subject to the priorities of the Office of Personnel Management.

**OPF integrity.** Agencies using RPA solutions in the OPM eOPF system are responsible for addressing and resolving any issues, errors, discrepancies, and/or negative impact (intended or unintended) the RPA solution may have on personnel records in the OPM eOPF system. Use of RPA solutions in the OPM eOPF system does not relieve the custodian of record of the responsibilities defined in Subpart C § 293.303 of 5 CFR.

**Privacy Act Information.** Agencies using RPA solutions in the OPM eOPF system are responsible for addressing and resolving any unauthorized disclosure of Privacy Act information that may result from RPA activity in the OPM eOPF system. Use of RPA solutions in the OPM eOPF system does not relieve the custodian of record of the responsibilities defined in Subpart D § 297.401 of 5 CFR.

### AGENCY INFORMATION

**Requesting Agency/Organization:** Required. The name of the agency and organization according to the official agency organizational chart, which will have oversight of the RPA solution.

**Sponsor Information:** Required. The sponsor is the primary individual accountable for the RPA solutions. This includes making sure the RPA solution stays compliant with security requirements. The sponsor is a federal government employee. Examples of sponsor responsibilities include assigning roles and responsibilities for the RPA solution (e.g., custodian assignment), fielding inquiries about the RPA solution, and overseeing who has access to the RPA solution.

**Custodian Information:** Required. The custodian is responsible for day-to-day operational management of the RPA solutions. Examples of custodian responsibilities may include overseeing the retraining or tuning of an underlying model, tracking data inputs to the RPA solution, and monitoring the RPA solution's data outputs.

### RPA INFORMATION

**RPA Software:** Required. The software solution which the agency intends to use to administer the RPA solution (e.g., UI Path, UFT, Automation Anywhere, Blue Prism, Power Automate, Intelligent Automation).

**Email:** Required. The email address which is/will be associated with the eOPF user account running the RPA solution. See User Accounts section in RPA Operational Requirements Agreement on Page 2 for more information.

**Description:** Required. Provide a short description of the RPA solution. This should include the purpose, impact/value, RPA solution actions, expected risk level, anticipated frequency in which the RPA will perform the action(s), and expected volume. Agencies may include any additional information they would like to share regarding the RPA solution for OPM's business development and security teams to consider when reviewing the RPA request.