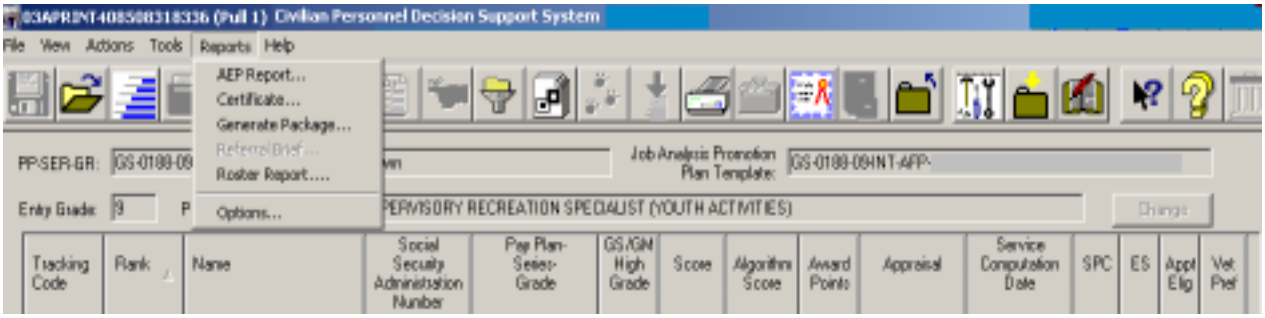
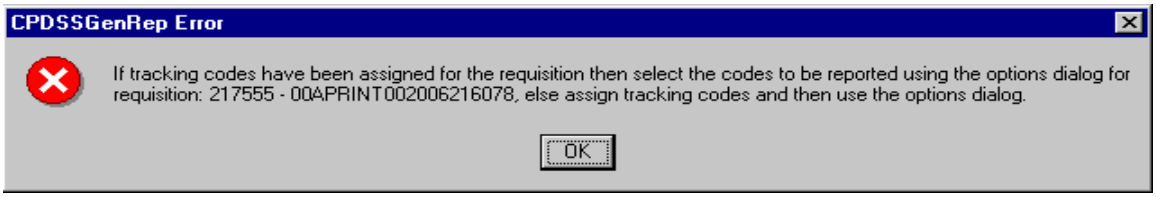
Chapter 7 - Generating a Referral Certificate and Referral Certificate Package

The Air Force Candidate Referral Certificate is designed to create certificates based on assigned Tracking Codes. To create a Referral Package or generate a Referral Certificate the first step is to go to the **Reports > Options** area on the main menu.

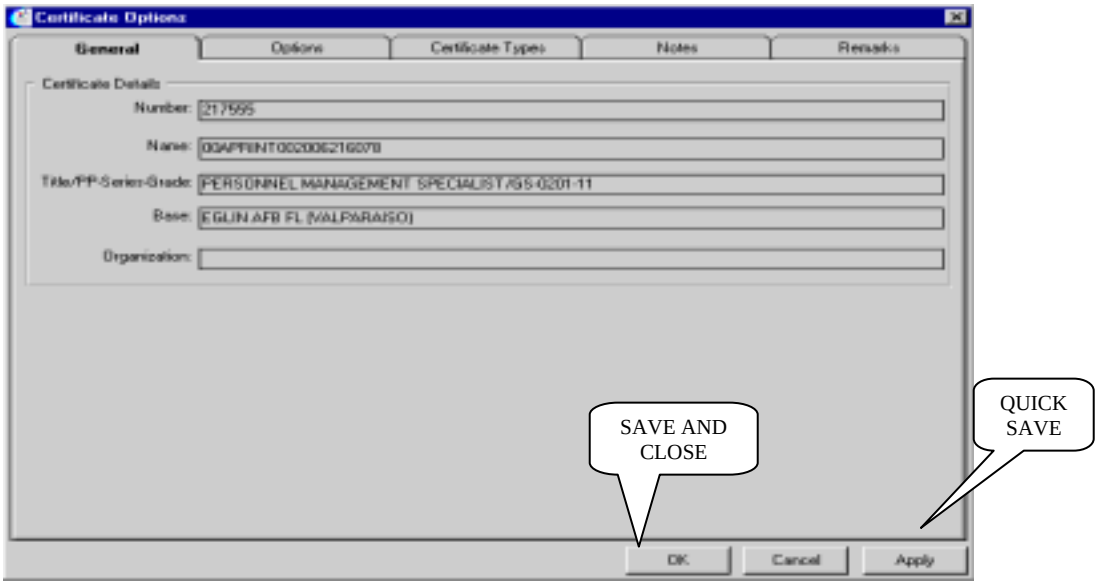


Note: When accessing the **Reports** menu, an attempt to generate a Certificate or a Package without completing the required Certificate Options Dialogue window will cause the following dialog box to appear.



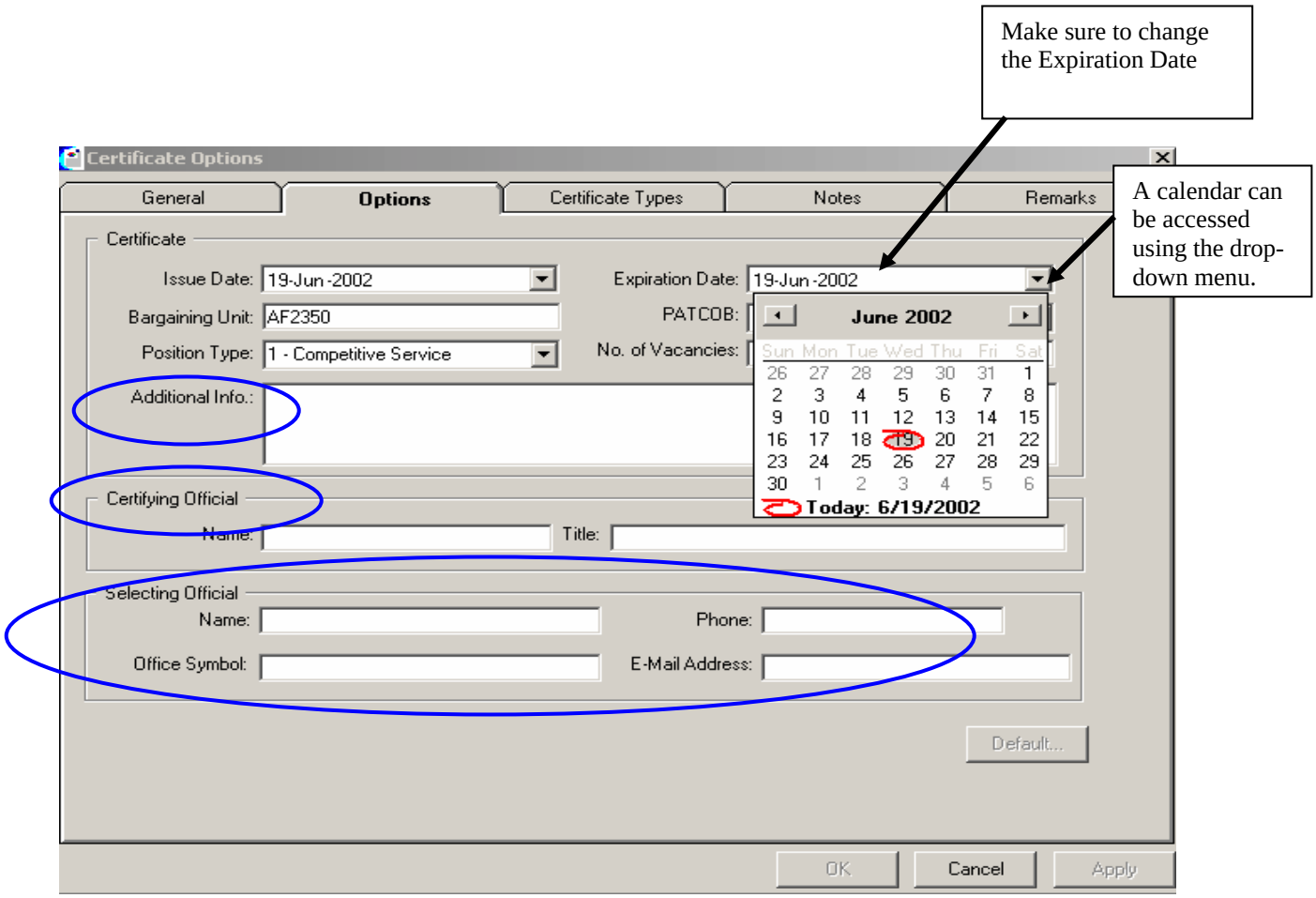
General

This tab is 'read only' and shows information that has been imported from the Resumix Requisition.



Options

This tab is used to add or modify information for the certificate.



Certificate Types

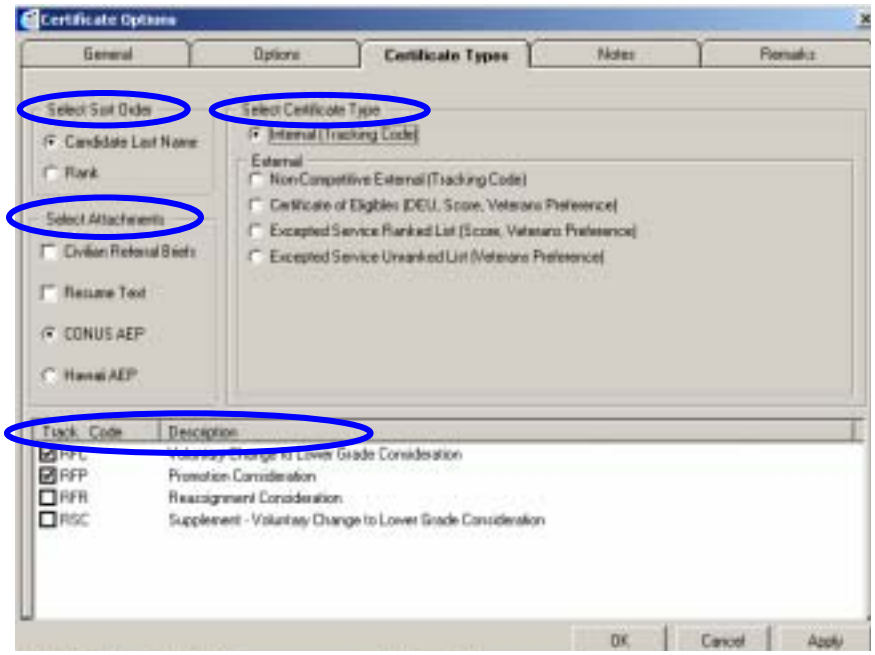
This tab is used to select which candidates will appear on the certificate based on Tracking Codes and the order in which the list of names will appear. The candidate must have been assigned the Tracking Code(s) selected for the certificate to appear on the certificate. **Note:** A separate referral certificate will generate for each Tracking Code that is selected. The only exception to this is the "Certificate of Eligibles" used for DEU referrals.

Select Sort Order: Candidates can be sorted either by last name or by rank.

Select Attachments: Civilian Referral Briefs can only be selected when the Certificate Type Is Internal

Select Certificate Type: Certificate Type is determined by the option selected under 'Select Certificate Type'.

Track Code/Description: All the Tracking Codes assigned on the Candidate Referral Roster (CRR) will be listed here. Select the code(s) to use to generate a Referral Certificate(s).
In the example, certificates will be generated on those individuals with Tracking Codes of "RFC" and "RFP".



NOTES:

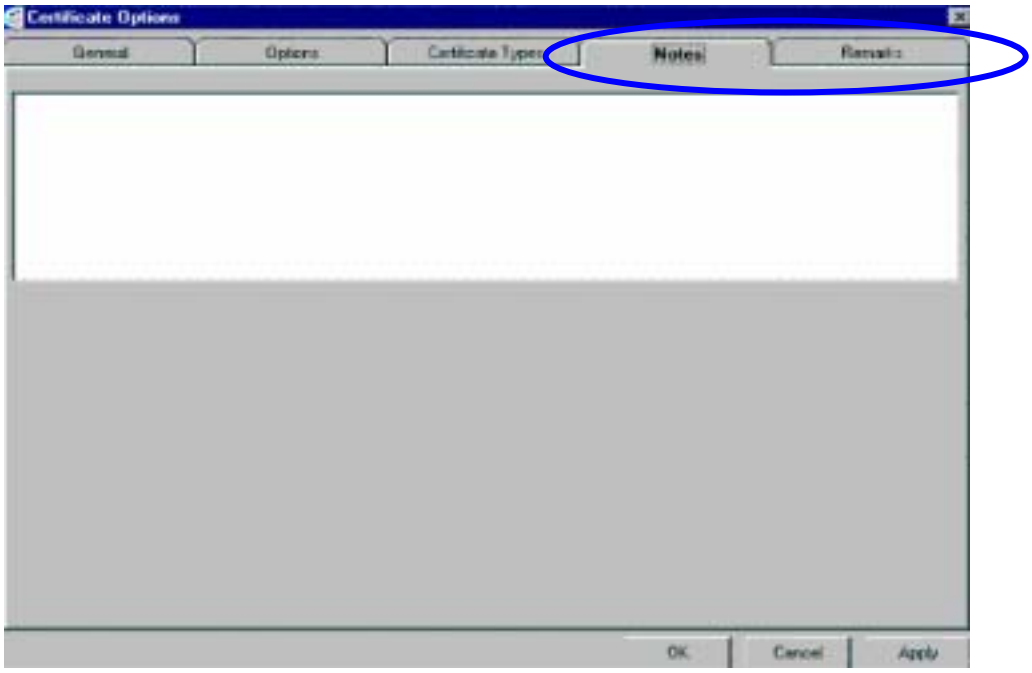
- **Civilian Referral Briefs:** Only available for internal candidates. This feature will not be used when an External certificate is selected.
- **Resume Text:** (All external candidates).
- **CONUS AEP:** (Used ONLY for all internal CONUS positions - screen defaults to this selection)

(Once External Certificate type is selected, the CONUS AEP box will be unselected as the AEP report is not included with external certificates.)

- **Hawaii AEP:** (Use for positions located in Hawaii).

The **Notes and Remarks** tabs are used to add additional information for the position or candidates on the referral certificate.

NOTE: Information typed in either of these areas will be displayed in either the Notes or Remarks area of the certificate. The maximum number of characters for each of these areas is 500 and a maximum number of lines is 5.

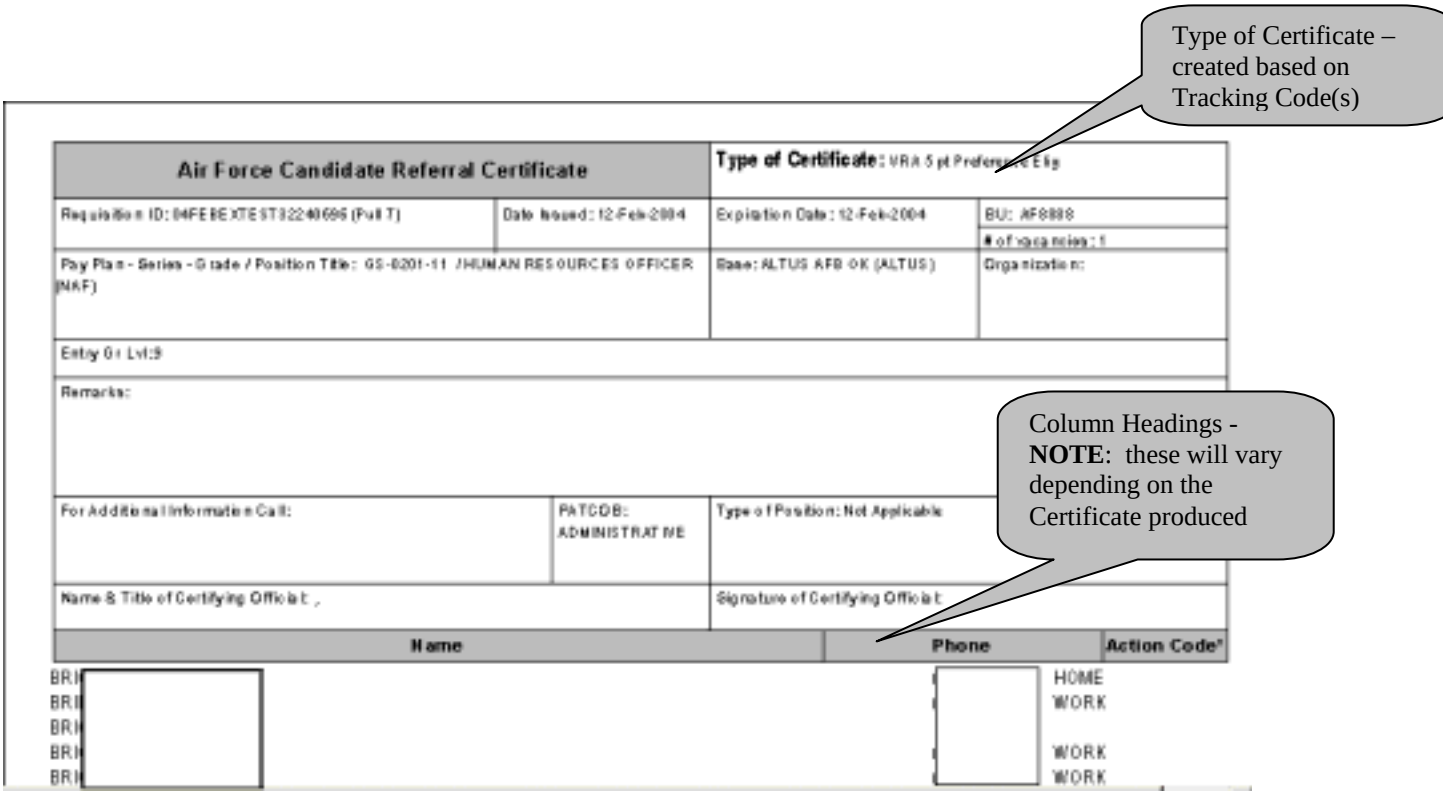


Generating a Referral Certificate/Package

When the certificate options area is complete, the Referral Certificate or Certificate Package may be generated. To produce only the certificate, select **Reports > Certificate**.

To produce the entire package (Certificate(s), AEP Reports, Resume Text or Career Briefs) select **Reports > Generate Package** from the main menu or use the **Generate Package** button.

Sample of Internal Referral Certificate Package:



CIVILIAN REFERRAL BRIEF | Current as of: 17-Feb-2004

FOR OFFICIAL USE ONLY. CONTAINS INFORMATION SUBJECT TO PRIVACY ACT OF 1974 AS AMENDED. PROTECT ACCORDINGLY.

Name: WO1 [redacted] **SSN:** [redacted]

DUTY PHONE: (303) 333-4434 WORK
DUTY LOCATION: U S A F Academy, El Paso, CO
PP-SERIES-GRADE: WG - 6907 - 05
TITLE: MATERIALS HANDLER
OFF. SYMBOL: LGLCC
CPCH: 00X08.MATERIALS HANDLER.32051.AF0B.APPR
ORGANIZATION: LOGISTICS READINES
AF0B 391005 USAF ACADEMY ACD, CO
DT. START POSH: 25-OCT-1998
SCD: 16-OCT-1984
DT. LAST PROMO: 01-MAR-1998
EXP TYPE: Federal Civil Service
SUPV LEVEL: 8
ACQ CATEGORY: ** <No Data> **
ACQ LEVEL: ** <No Data> **
ASSGN EFFECTIVE DT: 25-OCT-1998
ASSGN STATUS: Active Assignment
Demo BB:
Demo PP:

SKILL1: MKV / MKX	Materials Handling / Stock Handling	PERCENTAGE: 35.00	MONTHS: 22.00
SKILL2: MKV / MLB	Materials Handling / Freight Checking	PERCENTAGE: 35.00	MONTHS: 22.00
SKILL3: FKH	Sales Store Clerk		

EXPERIENCE HISTORY:

Start Dt.	End Dt. / Exp Type / Command	PP-SERS-GR	Title / Supv Level	ACQ Category	Demo BB	ACQ Level / Demo PP
31-MAR-2002	28-FEB-2003	GS - 0675 - 04	Medical Records Technician			Total Months Experience: 11.03
	Federal Civil Service		Non-Supervisory	** <No Data> **		** <No Data> **
	ACD - Air Force Academy				** <No Data> **	** <No Data> **
	Skill1: BJS		Medical Records Tech/Clk			Percentage: 55 Months: 6.07
	Skill2: BJT / CPX		Medical Clerk / Data Systems Support			Percentage: 45 Months: 4.96
25-OCT-1998	30-MAR-2002	WG - 6907 - 05	Materials Handling			Total Months Experience: 41.20
	Federal Civil Service		Non-Supervisory	** <No Data> **		** <No Data> **
	ACD - Air Force Academy				** <No Data> **	** <No Data> **
	Skill1: MKV / MKX		Materials Handling / Stock Handling			Percentage: 35 Months: 14.42
	Skill2: MKV / MLB		Materials Handling / Freight Checking			Percentage: 35 Months: 14.42
	Skill3: FKH		Sales Store Clerk			
01-MAR-1998	24-OCT-1998	GS - 0675 - 04	Medical Records Technician			Total Months Experience: 7.77
	Federal Civil Service		Non-Supervisory	** <No Data> **		** <No Data> **
	ELM - AF Elements (OTHER)				** <No Data> **	** <No Data> **
	Skill1: BJS		Medical Records Tech/Clk			Percentage: 100 Months: 7.77
21-APR-1991	28-FEB-1998	WG - 6910 - 05	Materials Expediting			Total Months Experience: 82.35
	Federal Civil Service		Non-Supervisory	** <No Data> **		** <No Data> **
	** <No Data> **				** <No Data> **	** <No Data> **
	Skill1: MMK		Materials Expediting			Percentage: 100 Months: 82.35
03-JUN-1990	20-APR-1991	WG - 8840 - 07	Acft Mech Parts Rpr			Total Months Experience: 10.58
	Federal Civil Service		Non-Supervisory	** <No Data> **		** <No Data> **
	LOG - AF Logistics Command (Historical)				** <No Data> **	** <No Data> **
	Skill1: NRF		Acft Mech Parts Rpr			Percentage: 100 Months: 10.58
16-AUG-1987	02-JUN-1990	WG - 8255 - 07	Pneudraulic Systems Mechanic			Total Months Experience: 33.58
	Federal Civil Service		Non-Supervisory	** <No Data> **		** <No Data> **
	LOG - AF Logistics Command (Historical)				** <No Data> **	** <No Data> **
	Skill1: MXK		Pneudraulic Sys Mech			Percentage: 100 Months: 33.58
24-MAY-1987	15-AUG-1987	WG - 8255 - 05	Pneudraulic Systems Mechanic			Total Months Experience: 2.74
	Federal Civil Service		Non-Supervisory	** <No Data> **		** <No Data> **
	LOG - AF Logistics Command (Historical)				** <No Data> **	** <No Data> **
	Skill1: MXK		Pneudraulic Sys Mech			Percentage: 100 Months: 2.74
02-FEB-1987	23-MAY-1987	WG - 8255 - 07	Pneudraulic Systems Mechanic			Total Months On Detail: 3.71
	Detail		Non-Supervisory	** <No Data> **		** <No Data> **
	LOG - AF Logistics Command (Historical)				** <No Data> **	** <No Data> **
	Skill1: MXK		Pneudraulic Sys Mech			Percentage: 100 Months: 3.71
26-MAY-1985	23-MAY-1987	WG - 3806 - 08	Sheet Metal Mechanic			Total Months Experience: 23.94
	Federal Civil Service		Non-Supervisory	** <No Data> **		** <No Data> **
	LOG - AF Logistics Command (Historical)				** <No Data> **	** <No Data> **
	Skill1: JJU		Sheet Metal Mechanic			Percentage: 100 Months: 23.94
16-OCT-1984	25-MAY-1985	WG - 3806 - 05	Sheet Metal Mechanic			Total Months Experience: 7.32
	Federal Civil Service		Non-Supervisory	** <No Data> **		** <No Data> **
	LOG - AF Logistics Command (Historical)				** <No Data> **	** <No Data> **
	Skill1: JJU		Sheet Metal Mechanic			Percentage: 100 Months: 7.32

CAREER PROGRAM REGISTRATION:

** <No Data Available> **

APPRAISALS: Date Rating Factors

CIVILIAN REFERRAL BRIEF | Current as of: 17-Feb-2004

FOR OFFICIAL USE ONLY, CONTAINS INFORMATION SUBJECT TO PRIVACY ACT OF 1974 AS AMENDED. PROTECT ACCORDINGLY.

Name: W [redacted] **SSN:** [redacted]

APPRAISALS:	Date	Rating	Factors
	01-JUN-2001	Level 3-Fully Succ or equiv. Pass level under pass/fail	656566666
	01-JUN-2000	Level 3-Fully Succ or equiv. Pass level under pass/fail	656566566
	01-JUN-1999	Level 3-Fully Succ or equiv. Pass level under pass/fail	545455455
	29-JUN-1998	Level 3-Fully Succ or equiv. Pass level under pass/fail	655655656

EDUCATION:	Level	Major	Yr Degree
	Terminal occupational program--4d	Welder/Welding Technologist	1980

TRAINING:	Date	Hours	Course
	03-JUN-1998	4.00	EQUAL OPP 2000

OCCUPATIONAL CERTIFICATION: Date Kind

** <No Data Available> **

AWARDS:	Date	Type
	18-JUN-2000	Time Off Award
	26-MAR-2000	Time Off Award

CONTRACTING INFORMATION

WARRANTS:

Begin Dt. End Dt. Amount Kind

** <No Data Available> **

TECHNICAL APPRAISALS:

Type Supv Technical

** <No Data Available> **

CORPS STATUS:

** <No Data Available> **

ACQUISITION CERTIFICATIONS:

Date Acq Career Level Achieved | Acq Certification Career Field | Acq Career Level | Acq Career Level Approval Authority

** <No Data Available> **

AEP Report

AFFIRMATIVE EMPLOYMENT INFORMATION

CERTIFICATE NUMBER: 020C' (Pull 1)

TYPE OF CERTIFICATE: Promotion Consideration

TITLE: MECHANICAL ENGINEER

PAY PLAN - SERIES - GRADE: GS-0830-12

The enclosed referral certificate(s) has the following representation:

1 HISPANIC MALES

You may have local goals for the categories below

DEFINITIONS:

DISABLED (NON-TARGET): Persons with medical disability codes greater than 05 as depicted in SF 256 with exception of target codes listed below

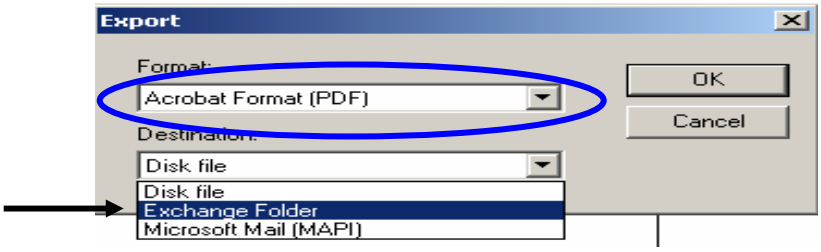
DISABLED (TARGET GROUP): persons with medical disability codes 16, 17 (DEAF); 23, 25 (BLIND); 28 and 32-38 (MISSING EXTREMITIES); 64-68 (PARTIAL PARALYSIS); 71-78 (COMPLETE PARALYSIS); 82 (CONVULSIVE DISORDERS); 90 (MENTAL RETARDATION); 91 (MENTAL ILLNESS); 92 (DISTORTION OF SPINE/LIMBS) as depicted on SF 256

This data may not be available for certificates with non - Air Force Candidates.

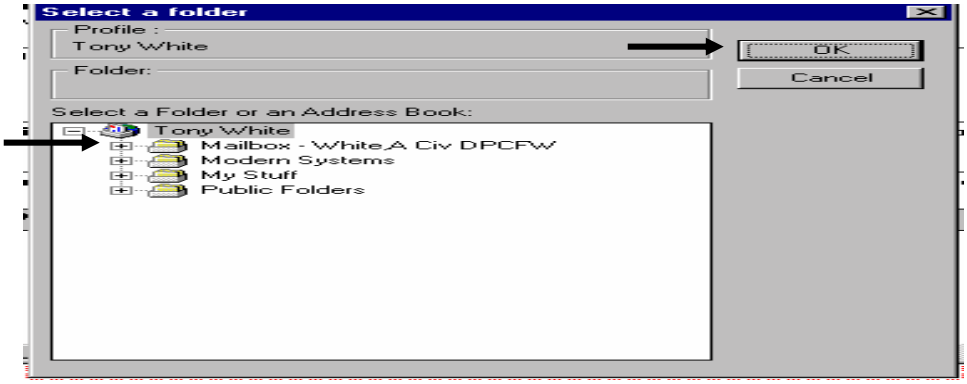
FOR OFFICIAL USE ONLY

Sending the Package Electronically

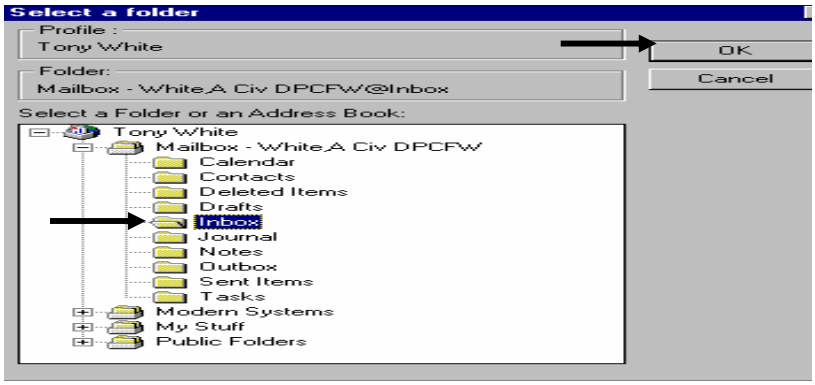
- Select the Open Envelope, the following screen will appear.
- Select **Acrobat Format (PDF)** as the Format.
- Select **Exchange Folder** as the Destination. Click **<OK>**.



- The **Select a Folder** Window will display indicating your exchange profile name. Select your mailbox folder and click **<OK>**.

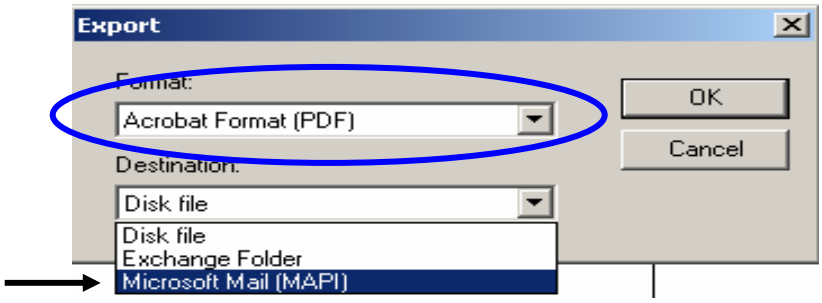


The certificate and all of the identified attachments will flow to your exchange inbox.
Select **Inbox** and click **<OK>**.



At this point the document may be open for final review or to add any other required documents/instructions, and forward to the CPF and/or selecting official based on internal procedures for that CPF.

- Or Select **Microsoft Mail (MAPI)** as the Destination. Click **<OK>**. This allows the user to send the email directly to the manager or intended person. Using the MAPI procedure the user can cut and past text information into the message area of the e-mail. E-mail **must be** open to use this method.



NOTE: The certificate or certificate package generated will be "Read Only."

Return of the Referral Certificate

Once the manager has made a selection(s), the certificate must be returned via e-mail, hard copy form by fax, mail or hand-carried. When the completed certificate is received, the CRR should be updated to reflect the tracking codes the manager has assigned to the certificate: Selected, Declined, Referred Not Selected, etc.

NOTE: Remember tracking codes ***only*** flow automatically to Resumix when one of the following occurs:

- Certificate Generation
- Certificate Package Generation
- Roster Archived

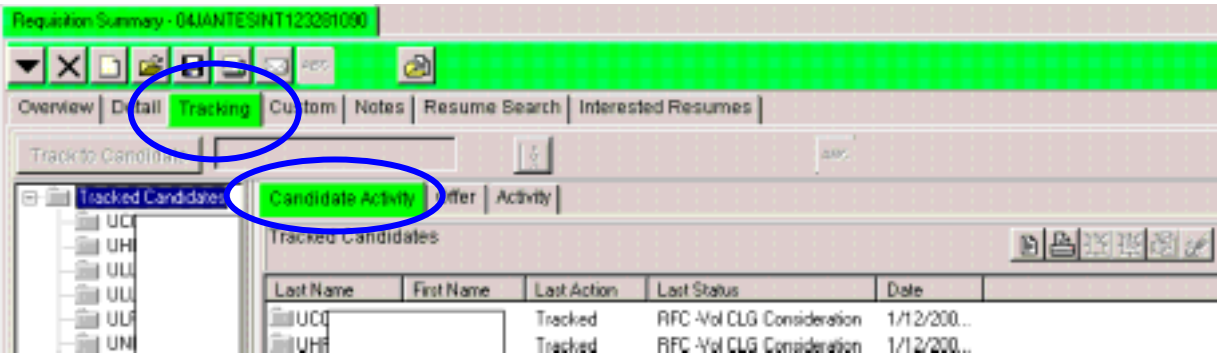
Any subsequent tracking codes applied to the CRR such as Selected and Non-Selected must be manually sent to Resumix. To send the Tracking codes to Resumix click the "Send Tracking" button Or **Actions > Send Tracking code** from the menu.

Hiring the Applicant – Updating Resumix

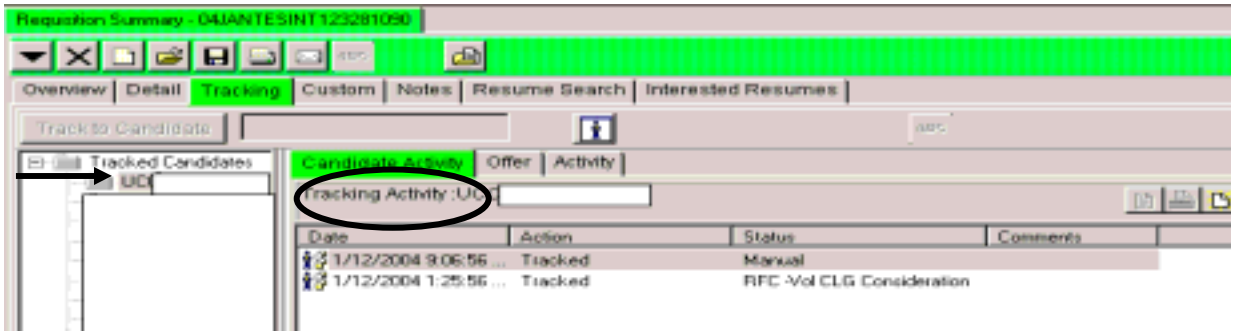
Once the effective date has been established, the staffing specialist has to update Resumix with the following information:

Step 1: Open the Resumix requisition being filled. (Follow the guidance in Chapter 3, Selecting an Existing Requisition.)

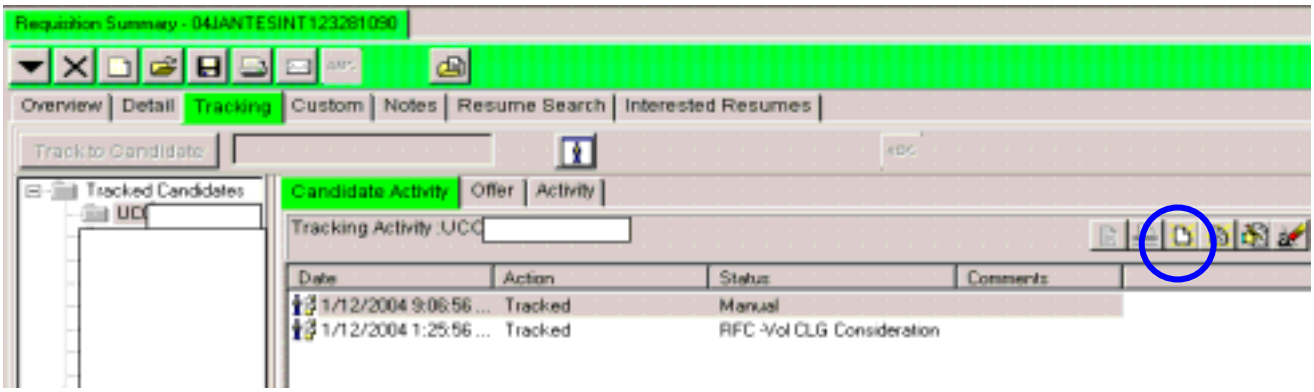
Step 2: Click the **Tracking** tab.
Step 3: Select the **Candidate Activity** tab.



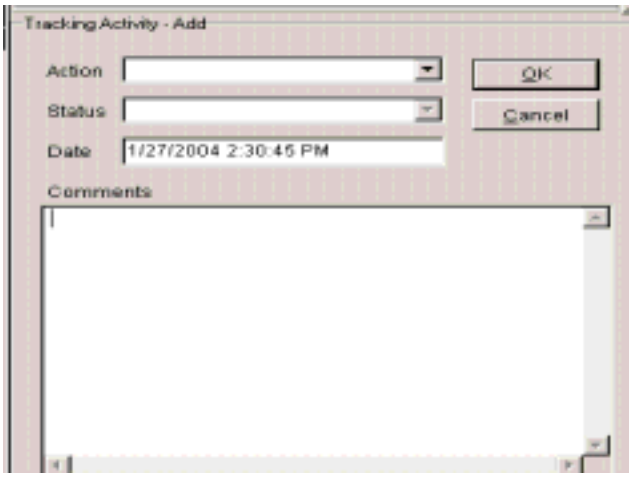
Step 4: Click on the **selected** applicant. The **Tracking Activity** for that applicant is now viewable.



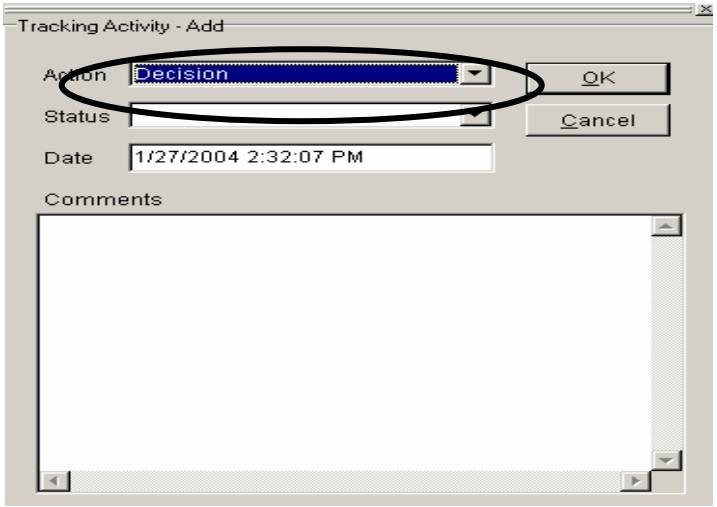
Step 5: Click the "**New Action**" button.



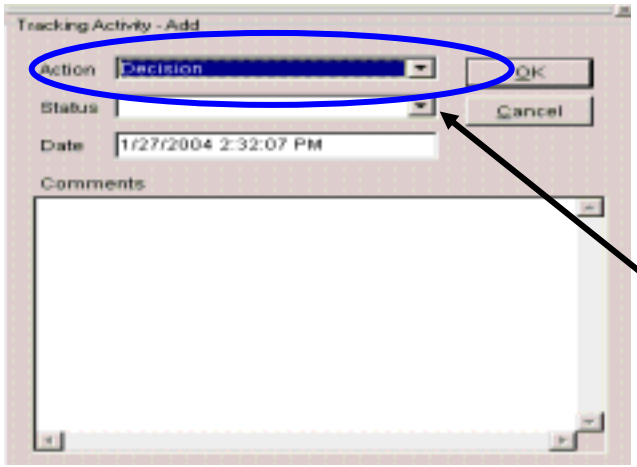
Step 6: The **Tracking Activity – Add** box appears. Comments added in this area will be visible in the tracking activity window for the candidate.



Step 7: Using the drop down menu select "**Decision**" as the Action.



Step 8: The **"Status"** field must be completed; however, it is dependent on several different factors.



When finished - Click **OK**

Review the chart below for the appropriate **Status** code.

Candidate	Currently in DCPDS	Status =
Currently a Permanent Air Force Employee (Tenure = 1, 2)	Yes	Internal Accept
Currently a Temporary Air Force Employee (Tenure = 0)	Yes	External Accept
Currently a DoD employee (Tenure 0, 1, 2, 3)	Yes **and** appointment action processed utilizing the Interagency Transfer request procedures.	External Accept
Currently serving on an Overseas Limited Appt or Term Appt (Tenure = 3)	Yes	Internal Accept
Not Currently a Federal Employee	No	Accept
Currently a Federal Employee	No	Accept

Decision/Accept

IMPORTANT!!! The staffing specialist will use the **Decision/Accept** Tracking Code ***only*** when hiring a candidate that is **not** currently in the DCPDS database. If filling a vacancy with an employee currently in the DCPDS, **Decision/Internal Accept or Decision/External Accept should** be used. *Failure to follow these instructions will result in employees having duplicate DCPDS records.*

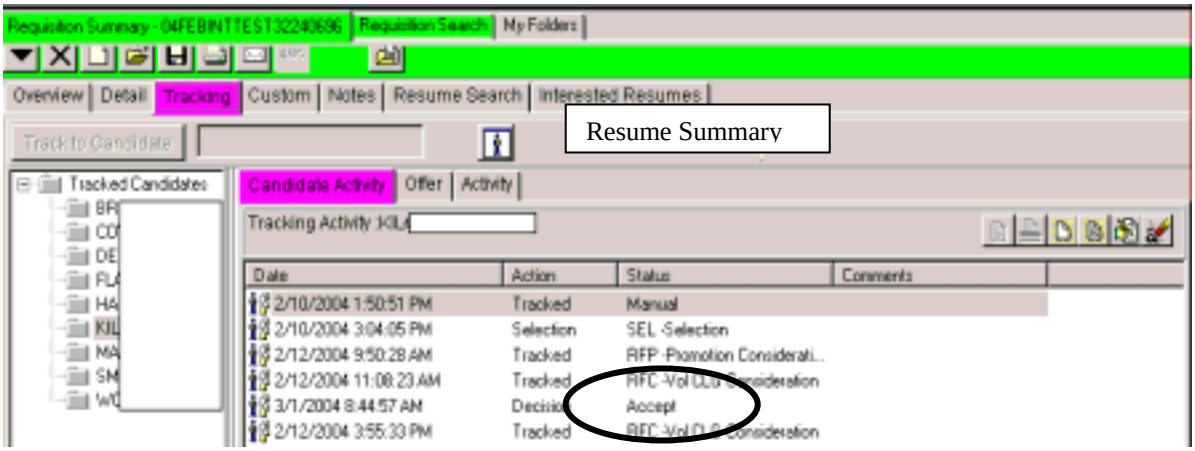
When the **Decision/Accept** Tracking Code is selected in Resumix, **a new Applicant record is created in DCPDS to be used in the appointment process.**

When the **Decision/Accept** Tracking Code is used, the system automatically

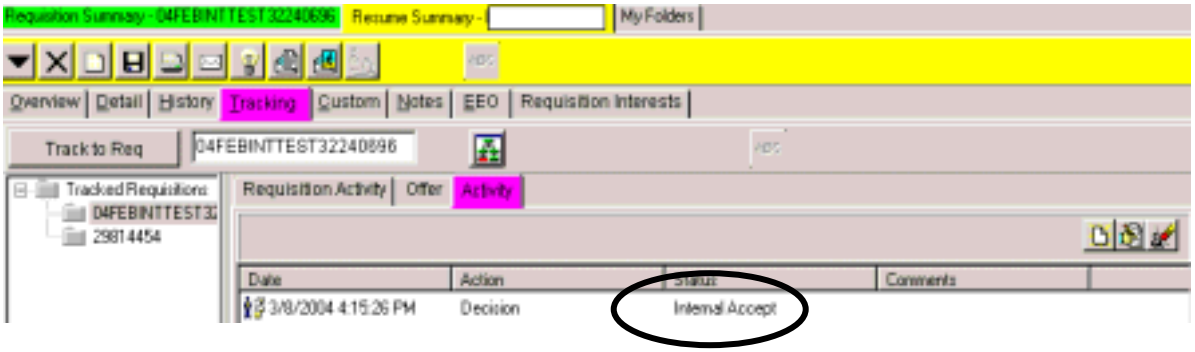
- Changes the applicant's status to **Hired,**
- Changes the position status to **Filled**, if only one (1) vacancy exists, or
- Decreases the Number of Openings by one.

Note: These automatic actions do not occur when you use the Internal Accept or the External Accept Tracking Code. You must change these fields manually.

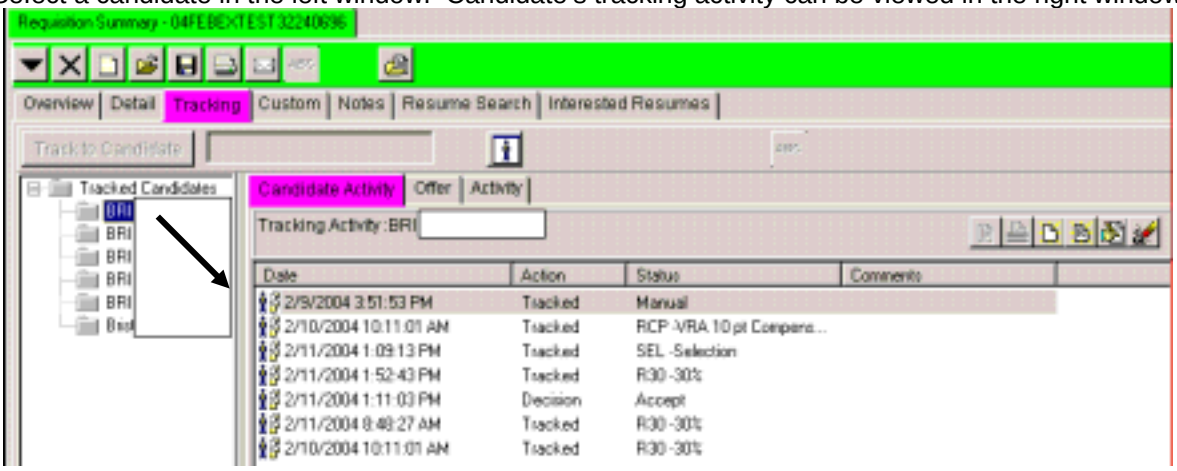
Step 9: Notice the new entry on the **Tracking Activity** screen for the candidate selected. A similar entry is added when you use Internal Accept or External Accept.



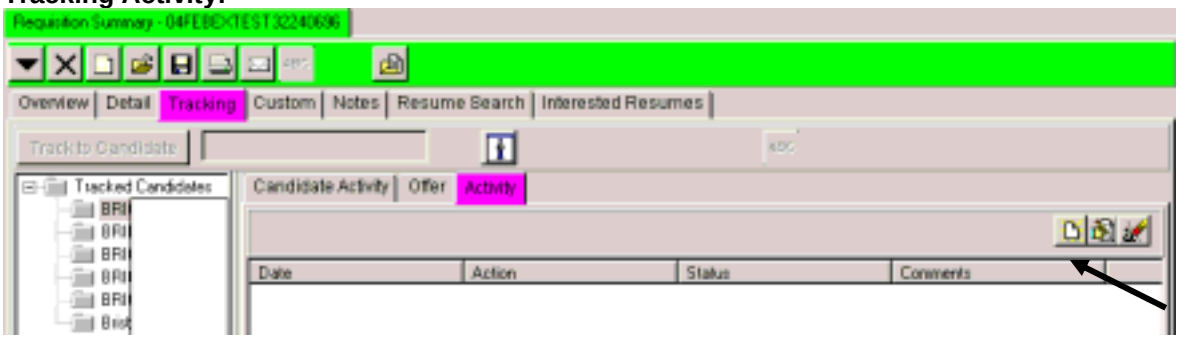
EXAMPLE: Shows difference between Decision/Accept above and Decision Internal Accept, below.

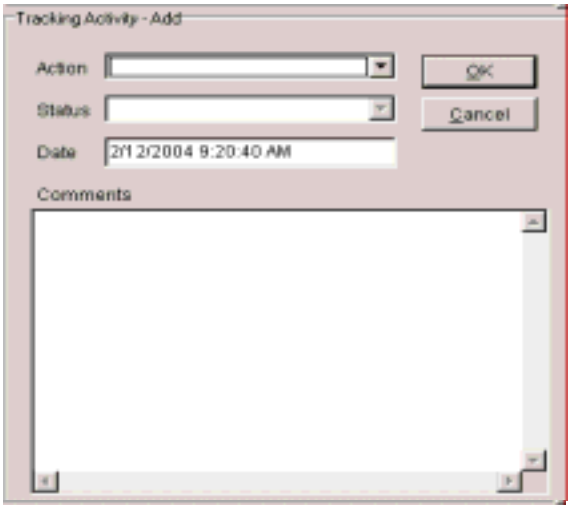


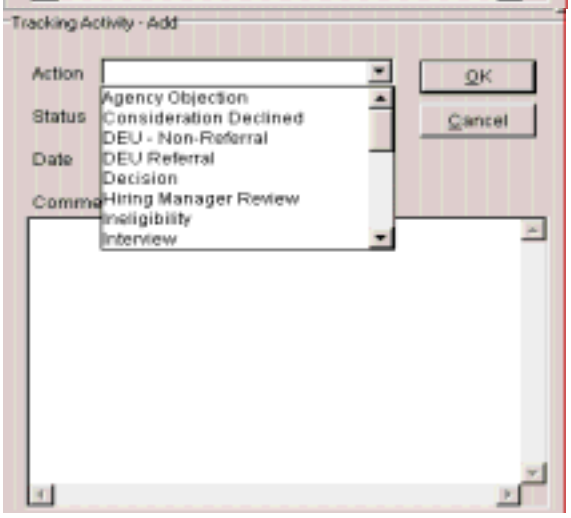
Select a candidate in the left window. Candidate's tracking activity can be viewed in the right window.

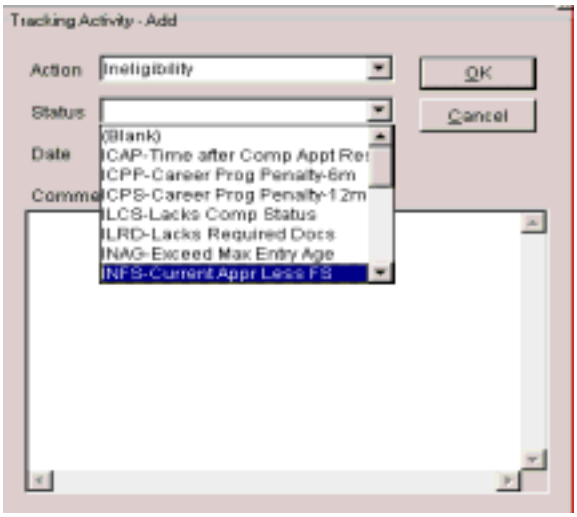


Tracking Activity:








Tracking Activity - Add
Action
Ineligibility
OK
Status
Cancel
Date
Comme
(Blank)
ICAP-Time after Comp Appt Re
ICPP-Career Prog Penalty-6m
ICPS-Career Prog Penalty-12m
ILCS-Lacks Comp Status
ILRD-Lacks Required Docs
INAG-Exceed Max Entry Age
INFS-Current Appr Less FS

EXAMPLE: The below candidate activity shows when the selection was accomplished, when the applicant accepted the position and when an offer of employment was extended (with a pending relocation benefit).

Candidate Activity | Offer | Activity

Tracking Activity :KIL

Date	Action	Status	Comments
2/10/2004 1:50:51 PM	Tracked	Manual	
2/10/2004 3:04:05 PM	Selection	SEL -Selection	
2/12/2004 9:50:28 AM	Tracked	RFP -Promotion Considerati...	
2/12/2004 11:08:23 AM	Tracked	RFC -Vol CLG Consideration	
3/1/2004 8:44:57 AM	Decision	Accept	
3/5/2004 2:15:22 PM	Offer	Offer Pending Relocation	
2/12/2004 3:55:33 PM	Tracked	RFC -Vol CLG Consideration	
2/12/2004 10:55:02 AM	Tracked	RFP -Promotion Considerati...	
2/11/2004 3:14:43 PM	Tracked	RFC -Vol CLG Consideration	
2/10/2004 2:38:48 PM	Tracked	RFC -Vol CLG Consideration	

Step 10: Update the Resume Summary for the selected candidate. Select the **Resume Summary** button.

Step 11: The **Resume Summary** window will appear. Select the **Custom** tab.

Requisition Summary - 04JANTESINT123281090 | Resume Summary -

Overview | Detail | History | Tracking | Custom | Notes | EEO | Requisition Interests

Group GENERAL

Custom Field	Text	Date	Number
PERM-Office Symbol	ENPD		
PERM-Org Struc ID	AENPD		
PERM-PAS	WE1MFDFV		
PERM-PP	GS		
PERM-SER	0801		
Appointment Type	1A		
Rating of Record	5		
SCD Civilian		7/2/1973	
SCD Leave		7/2/1973	
SCD RIF		7/2/1973	
Social Security Number			
CCPO ID	9X		
Resume Expiration		4/1/2004	

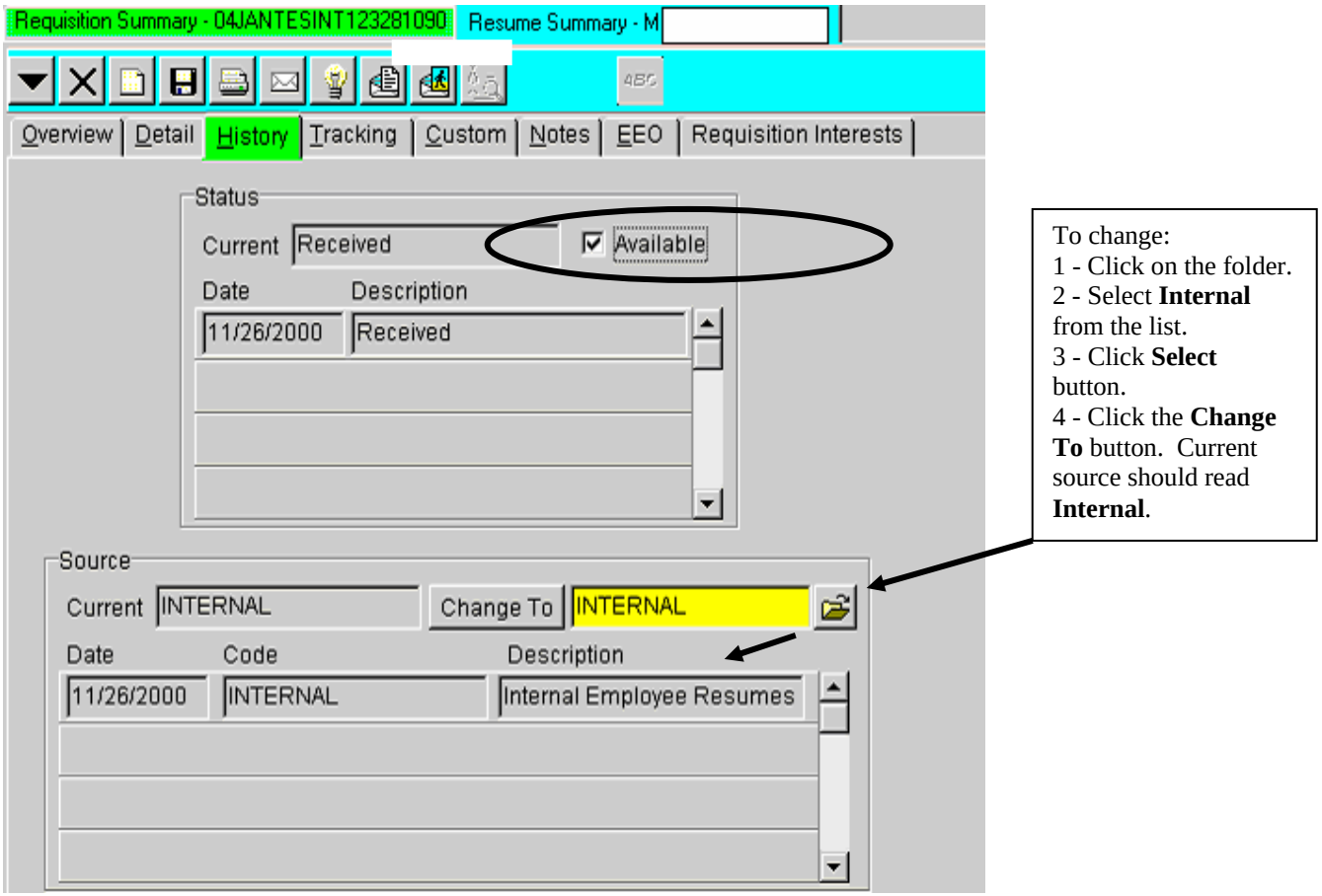
Step 12: Under the **General** group, locate **Resume Expiration** custom field. Change the **Resume Expiration** custom field to:

Position Candidate Selected For…	Action to be Taken …….
Temporary Position (Tenure = 0)	Change the date to current date.
Permanent/Term/Overseas Limited Position (Tenure = 1, 2, or 3)	Delete the resume expiration date.

NOTE: Only external applicants will have resume expiration dates.

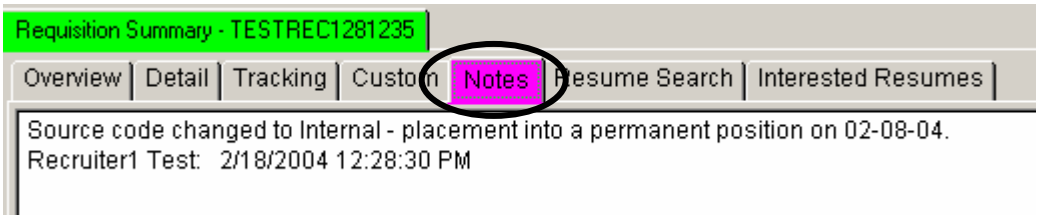
Step 13: THIS STEP IS ONLY TO BE USED IF AN EXTERNAL CANDIDATE IS SELECTED FOR A PERMANENT/TERM/OVERSEAS LIMITED APPOINTMENT (TENURE = 1, 2, or 3). Prior to completing this step, you must make sure the DCPDS applicant record has flowed into DCPDS.

1) Under **Resume Summary** tab, select **History** tab**.**
2) Place a check ☑ in the **Available** block.
3) Change the source code to **INTERNAL**.



Under **Resume Summary** tab, select the **Notes** tab.

Insert the following note: Source code changed to internal - placement into permanent position on (enter date).

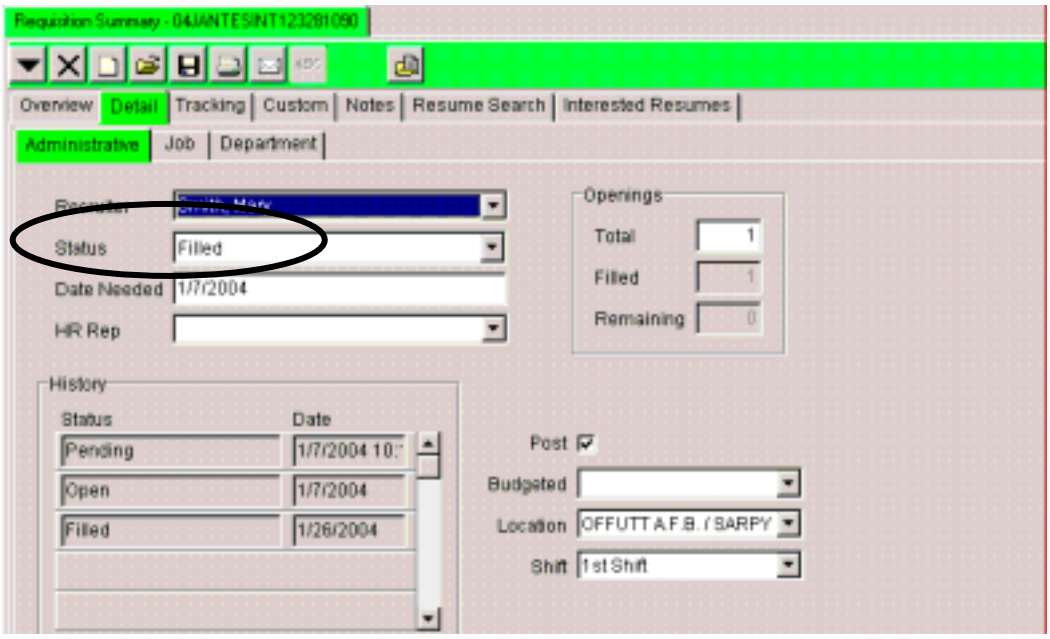


Click the **Save** button.

Step 14. To close a requisition. Open the Detail tab **in the requisition**; then select the Administrative tab.

a. Change the **Status** to the appropriate response by opening the drop down menu and selecting the appropriate status (e.g., Filled/Cancelled/Returned/etc.)

b. If there is more than 1 opening, manually change the number of openings; if there was only 1 opening, the system automatically will change the Filled field to 1 and the Remaining field to 0,.



Click the **Save** button.

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