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Introduction to Applicant Tracking

Welcome to the Applicant Tracking module of PeopleAdmin. In this module, you have the ability to create job postings, review applicants and application materials, and request a job offer and approval. The job posting is the first look a potential applicant receives of the position and, possibly, the University of Idaho. The Hiring Proposal is the form that will ensure your candidate is properly hired.

During this training document, we will cover:

1. How to create a new Staff/Professional job posting and secure the proper approvals to begin your recruitment.

2. How to review your applicants and their application materials.

3. How to request an interview for your qualified applicants and how to request follow-up interviews.

4. How to complete a Hiring Proposal and complete the hiring of your applicant.

Must have an approved job description and Position Authorization Form (PAF) through the Position Management module to begin a Staff/Professional posting.
Login Information:

1. Website address: https://uidaho.peopleadmin.com/hr

2. You will login with your current network login information.
**Applicant Tracking Module**

**Introduction & Home Page:**
Once you have logged into PeopleAdmin, the Home Page will display an inbox, watch list, and other items where you easily navigate to actions which need your attention. Below is a detailed list of the Home Page and the functions available:

<table>
<thead>
<tr>
<th>Functional Area</th>
<th>Location</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Inbox</strong></td>
<td>CENTER of Home Page upon log in</td>
<td>Displays all items requesting your attention (approval/review).</td>
</tr>
<tr>
<td><strong>Watch List</strong></td>
<td>BOTTOM of Home Page upon log in</td>
<td>Displays any request you are watching (postings, position actions) for easy access.</td>
</tr>
<tr>
<td><strong>My Profile Help</strong></td>
<td>Columns at TOP of screen</td>
<td>Used to update your user account details and online help for using the system.</td>
</tr>
<tr>
<td><strong>Module Type Selection</strong></td>
<td>Upper RIGHT hand corner of screen</td>
<td>Used to toggle between the Position Management and Applicant Tracking modules.</td>
</tr>
<tr>
<td><strong>User Group Selection</strong></td>
<td>Upper RIGHT hand corner next to your name</td>
<td>Displays the user groups available to you and the arrow will toggle you into each user group.</td>
</tr>
</tbody>
</table>

**Module Type Definitions**

- **POSITION MANAGEMENT**
  Used to create or modify Position Descriptions, view Position Descriptions, and submit Position Actions.

- **APPLICANT TRACKING**
  Used to create and view Job Postings, view Applicants and application materials, complete Hiring Proposals, and navigate Onboarding.
**User Group Definitions**

**AAC** – The Affirmative Action Coordinator (AAC) will approve all actions at the College/Unit level and will ensure proper routing and approvals. Can also create or edit position descriptions and announcements.

**Approver** – The Approver may include Deans, Directors, or higher level executives in the College/Unit that would need to approve a position action, as required by College/Unit needs.

**Employee** – The Employee can view position descriptions.

**Executive Approver** – The Executive Approver is dedicated to the Vice Presidents, the Provost, and the President (or designees). They have overall approval for position actions (PAF and Hiring Proposal).

**HRAI** – Human Rights, Access, and Inclusion (HRAI) will review and approve position actions, announcements, posting materials, and applicant demographics based on Equal Opportunity and Affirmative Action standards.

**HRS** – Human Resource Services (HRS) will review and approve all position actions, announcements, and hiring proposals at the University level.

**Office of Sponsored Programs** – The Office of Sponsored Programs will review position actions that have any grant funding.

**Position Control** – Position Control is the Budget Office review of position actions. The primary reviewer is the Executive Director of Planning and Budget.

**Search Committee Member** – The Search Committee Member is designated to participate in review of candidates and/or interviews.

**Search Coordinator** – The Search Coordinator is responsible for the administrative support for searches. They may not necessarily be the Manager or the Search Chair of the position, but they will help with documenting notes or uploading information for those individuals.

**Supervisor/Manager** – The Supervisor/Manager creates or edits the position descriptions and announcements for their employees.

**Please note:** Individuals may have only one user group or may be assigned to more, depending on their role within the approval process for actions.
Core Functions of the Applicant Tracking Module:

- Approve a posting for recruitment
- View Job Postings and Applications
Creating New Postings

Must have an approved job description and Position Authorization Form (PAF) through the Position Management module to begin a Staff/Professional posting.

1. Verify you are in the ‘Applicant Tracking’ module and authorized to create a posting (Supervisor/Manager or AAC).

2. Hover over ‘Postings’ and click Staff/Professional or Faculty (depending on type of position you need).

3. In the upper, right corner of the page, click the button

4. A box will appear that will give four options:
Create from Position Type – This option includes only the information that applies across the entire Position Type. A new Posting from a Position Type is almost completely blank. NOTE: This option is used only for Student/Temporary postings.

Create from Posting – This option uses an existing posting as a template and automatically copies in most information. NOTE: This is used for Student/Temporary postings or reposting a failed search.

Create From Position Description – This option copies in most of the information from a position description. NOTE: Most positions will be created from Position Description.

5. Select “Create from Position Description” to create a posting. This will take you to a page where you may enter a title into a search box or select from a list of approved position descriptions in your department. Once you have located your desired position description, click on the Title hyperlink.

6. This will take you to a page with the Position Summary. Select “Create Posting from this Position Description” button at the top right corner of the page to start your announcement.
   a. If you select the “Modify Position Description” link, your position will go through the Position Management process again for approval. Be aware that the header will stay blue.

7. The Position Title (Working Title) and Organizational Unit will default automatically from the Position Management module.
8. The “Accept Online Applications” will be automatically selected. Do not change it.

9. “Special Offline Application Instructions” may be entered to provide any instructions to the applicants regarding your posting. These instructions will appear at the top of the posting. You can also enter these instructions in the next page at “Special Instructions to Applicant” which will appear in the body of the position announcement.

10. Select the “Main Application” checkbox.

11. Click the Create New Posting button at the top or bottom right side of the page. This will take you to the Editing Posting menu and Position Details page.
Position Details

Most position details from the approved position description will default into the page. The following position description information is either optional or required. Required information will be indicated by a red asterisk and a red box.

**POSITION INFORMATION**

Most information will default from the approved position description.

**Editable fields:**

- **Pay Range:** The minimum to midpoint of the pay range will default in from the approved PAF. Executive Approver authorization is needed to post a range from the Minimum to above the Mid-Point of the Pay Grade (ideally during the Position Management module). NOTE: You will need to add the dollar ($) signs to the text field.

**POSITION RESPONSIBILITIES, RESPONSIBILITIES, & POSITION QUALIFICATIONS**

All information will default from the approved position description and is not editable. If you would like to edit any of these fields, you will need to follow the “Modify Position Description” process in the Position Management module.
POSTING INFORMATION

Search Coordinator – Type in the last name of the Search Coordinator you desire and a list will appear of designated Search Coordinators to select from. NOTE: Definition of Search Coordinator found on Page 5.

Posting Date – This is the preferred date to post the position.

Closing Date – Indicate the preferred closing date for the posting. Minimum requirements are:
  o Two (2) weeks for Classified and Temporary Faculty positions.
  o Four (4) weeks for Exempt and Faculty positions.
  o Three (3) calendar days for Student/Temporary positions.
*For posting periods less than the aforementioned minimum posting requirements, a search exception must be granted from the Office of Human Rights, Access, and Inclusion.

Open until Filled – This field will default as “No”. If you would like to leave open until filled, indicate “Yes” and designate a first consideration date for applicants in the “Special Instructions to Applicant” field.

Special Instructions to Applicant – Input specific instructions to help the applicant fully complete their application. Information may also be entered here to help the applicant understand your department or unit.

Background Check Budget Number – Enter the budget number used for the background check. This can be different than the budget used for advertising.

Quicklink for Posting – The link to the posting from the applicant view of the webpage.
ADVERTISING

Applicant Tracking Module
Applicant Tracking Module

Advertising Venues – Select from the list of commonly used advertising venues. You can multi-select from this list. If your desired advertising venue does not appear, please use the “Additional Advertising Venues” field. The minimum advertising requirements are:

Regional searches (Generally considered for Pay Grades 2 – 6): Must advertise one weekend in two local newspapers.

National searches (Generally considered for Pay Grades 6 and above, and Faculty positions): Must advertise with affirmativeaction.org.

Additional Advertising Venues – If you have additional advertising venues in which you would like to advertise, indicate here. If you plan on submitting your own advertising and not use JobElephant for a particular venue, please indicate here. NOTE: Listservs must be initiated at the department level and will not be handled by Human Resources or JobElephant.

Special Advertising Text – If you wish to prepare your own advertising copy, please input your text here.

Coordinate with JobElephant – Our third party vendor for advertising is JobElephant. Indicate yes if you want Human Resources to handle your advertising. Indicate “No” if you would like to submit your own advertising (usually trade sites where you will get a better price).

JobElephant Notes – If there are special instructions about advertising for JobElephant, you may include it here.

Advertising Budget Number – If Human Resources is handling your advertising, please insert your budget number here. This is a required field, so if you are not using HR, please use “N/A”. This can be different than the budget used for the background check.

When all of the required fields are complete, Click **Next** to save and move to the next screen.
Applicant Tracking Module

**Funding**

This form is not editable. The information defaults from the position description.

**Posting Documents**

Posting documents include interview questions, the screening form, and additional posting documents. Check with your AAC on when the Screening Form should be uploaded. The Interview Questions are required for every search, but they may be uploaded any time prior to interviews beginning. Examples of Additional Posting Documents may include: additional interview questions, reference questions, etc.

The Posting Documents may be uploaded, created in the system at the same time the posting is created, or you may choose existing documents already in the system. Check the Actions button to the right of the Document Type to indicate how you will add the document.

**Upload New**

Name: Interview Questions (req)

Description:

File to upload: Browse...

If you already have interview questions created and want to upload them, under Actions click **Upload New**. Once in the form, add a description of the document and click the “Browse...” button. A pop-up window will appear with your computer folders and files; select your document with your interview questions then press the “Open” button.
Create New

Create a New Interview Questions (required)

Name: Interview Questions (req)

Description:

If you choose to create a document within the system, under Actions click Create New. This will bring you to a Create New Form page. Fill in the Name and Description boxes, complete the form in the text box, and submit.

Choose Existing

To choose an existing document, under Actions click Choose Existing. This will bring you to a list of documents existing in the system that you may choose from.

Click Next to save and move to the next screen.
## Applicant Documents

<table>
<thead>
<tr>
<th>Order</th>
<th>Name</th>
<th>Not Used</th>
<th>Optional</th>
<th>Required</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Resume/Cv</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>2</td>
<td>Cover Letter/Letter Of Application</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>3</td>
<td>List Of References</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>4</td>
<td>Research/Teaching Philosophy</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>5</td>
<td>Transcripts</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
<tr>
<td>6</td>
<td>Reference Letter 1</td>
<td>☐</td>
<td>☐</td>
<td>☐</td>
</tr>
</tbody>
</table>

Applicant Documents are the documents and information the applicant is required to submit with his or her application. The use of the “Optional” selection is not recommended, as it may create inconsistency amongst applicants. Select the “Required” selection for any documents that you would like the applicant to submit for evaluation.
Supplemental Questions

Supplemental questions can be added here. Click on **Add a Question**. A pop-up box titled “Available Supplemental Questions” will appear. You may choose questions from those available by category or click **Add a new one** in the bottom right corner of the box.

**Choosing Existing Question by Category:**

The Category is broken up by College/Unit. Select the Category of the question you would like to use. A list of existing questions will appear below. Select the check box next to the corresponding question you would like to use. Once selected, the entire question with answers will appear. After you have completed selecting all of the questions you would like to use, press the Submit button. Your questions will be attached to the posting and the applicants will be required to answer.

**Add a New One:**

Questions defined here will be “pending” approval and will not be available for use in other areas of the system until they have been approved.
If you do not see an existing question that you would like to ask, you will need to add a new question. After clicking “Add a New One”, a separate pop-up box will appear. First, enter the name for the question. Under Category, select the college or unit the position is in. Add the question in the text box, and then select whether it is an open ended question or should have a predefined answer. Open Ended Questions will allow the applicant to add a free form answer to your question. For predefined answers, add the possible answers. New answer fields will automatically appear as needed. After all of your possible answers are entered, click Submit.

Your selected questions will now appear as a list on the page. You can change the order of the questions by either a) changing the number in the “Position” column and pressing the Save button, or b) click and hold on the question and drag it to the order you prefer. If you would like this question to be a required question to be answered by the applicants, you will need to select the checkbox in the “Required” column. You can remove the question by clicking on the gray “X” button on the far right of the question.

If you chose a question with open-ended answers, you can skip this paragraph. If you chose a question with predefined answers, click on the question to reveal the predefined answers for this question. Here you can give points to certain answers and/or make an answer disqualifying. Selecting an answer as disqualifying can automatically disqualify an applicant if they select one of those answers. If you would like to use this feature, please work with your AAC or Human Resources to ensure that you are correctly using this feature.
The Guest User feature is intended for those individuals who are not a Staff or Faculty member of the University of Idaho, but will be serving on a committee for a specific search. You will usually use this feature if you have an outside community member or UI student on your search committee. A Guest User will be able to view the applicants and application materials for the search they are given access to. They will not have the ability to make any actions on applicants.

To add a Guest User, select Create Guest User. A Username and Password fields will appear with a username and password already assigned. If you would like to change the password, update the information in the “Password” field and select the “Update Password” button. Enter the email address of the guest user and the Username and Password will be automatically sent to them. All Guest Users that are assigned will have the same Username and Password to access the specific posting.
Search Committee Members

Search Committee Members will be able to view applicants and application materials of the applicants in the posting they are assigned.

Search

Find a User to assign as a Search Committee Member.

First Name

Last Name

Email Address

Search

To add search committee members, you may search for someone in the database by entering the first name, last name, and/or email address under Search. Once you see the employee you would like to add to the search committee, click on the Add Member button. If the employee will also serve as the Committee Chair, you can select the checkbox next to the Add Member button.

New Search Committee Member

Request that someone be granted access to the system for the purpose of serving as a Search Committee Member. Required fields are indicated with an asterisk (*).

Account Information

Please enter the following information to create an account for a new Search Committee Member.

* First Name

* Last Name

* Email

* Username

Submit

If you are unable to find your needed search committee member, you can create an account for a new search committee member. This will normally be used for your long-term TH employees. To create the new search committee member account, fill in the fields for the employee’s first and last name, email, and assigning them a username.
**Evaluative Criteria**
We are not currently using this feature. We will provide more information in future version of this document.

**Summary**

Review the sections of the posting under the Summary tab. This is an opportunity to edit the position. If all the sections are completed correctly, each one will be accompanied by a blue check mark.

An orange exclamation point ! to the left of a section indicates that required information is missing. Select the blue **Edit** link for that section to go back and make the required updates. Select **Save** or **Next** to save and continue. After saving you can move to the **Summary** to review the final information for additional errors.
Take Action on Posting

When you are ready to forward your completed Posting, press the “Take Action On Posting” button in the upper right. You will receive multiple options on what action to perform. To move forward to your Affirmative Action Coordinator (AAC), select “Send to AAC (move to AAC)”.

*Please note, to save this request and submit later, please select ‘Keep working on this Posting’. If there are additional approvers within the department, you will need to select appropriate action per the workflow.

You will receive a pop-up window to add any optional comments you wish to share with your AAC. **Note:** These notes are discoverable and will be seen by all approvers in the process.

You also have the option to add this posting to your watch list. This checkbox is automatically selected. If you do not wish to keep this posting in your watch list, deselect the check box. Click on **Submit**.

Once you submit your completed Posting, you will receive a notice on a green bar at the top of your page indicating the Posting was successfully transitioned and an email in Outlook was sent to the next approver to notify them they have an action pending.
Applicant Tracking Module

When all information is entered, you can view how the posting will look to the applicant by selecting “See how Posting looks to Applicant”.

**Posting Actions**

The posting will be routed through the Affirmative Action Coordinator to Human Rights, Access and Inclusion, and then to Human Resources. Human Resources will check to post and approve it for posting. The post will appear on the website on the posting date indicated in the announcement. The post can also be sent to Internal/Invite only with an approved search waiver (Invite) or search exception (Internal).

**Internal/Invite Only Postings**

**Internal Posting:** In order to conduct a search that is internal to University of Idaho employees only, you must first receive a Search Exception from HRAI. You can input your notes and request in the Position Management module. If the exception is granted, your posting will not be posted to the public site. Instead, University of Idaho employees will be given a link to the posting through the Daily Register and they will apply directly to the position.

**Invite-Only Posting:** In order to conduct an Invite-Only posting, you must first receive a Search Waiver from HRAI. You can input your notes and request in the Position Management module. If the waiver is granted, your posting will not be posted to the public site. Instead, you will be given a link that you will e-mail to your applicant and they will apply directly to the position.
View Job Postings and Applicants:

1. Verify you are in the ‘Applicant Tracking’ module and authorized to create a posting (Supervisor/Manager or AAC).

2. Hover over ‘Postings’ and click **Staff/Professional** or **Faculty** (depending on type of position you need).

3. You can locate your posting by either a) locating your search in the “Staff/Professional Postings” list and select on the Position Title hyperlink, or b) entering a position name in the Search field and click Search.

4. Once you select on your posting, you will have a number of options.

- **Summary** – You will see the posting information.
- **History** – You will see the history of all actions taken in this search. This information includes who made the action and at what time and date.
- **Applicants** – You can view the applicants for this position and view their materials.
- **Reports** – You can run reports based on the information provided by the applicants.
- **Hiring Proposals** – You can view who has been offered this position during this search.
Applicant Tracking Module

Associated Position Description – You can view the information from the Position Management module for this posting.

**Reviewing Applicants and Application Materials**

After selecting your posting, click on the “Applicants” link. The applicants will be listed at the bottom of the page under Staff/Professional Job Applications. Here you will see their first and last name, date of application, where they are located in the workflow, the documents submitted, and an option for the type of action you would like to make on a specific applicant.

Above the list of applicants on the right-hand side of the screen, is a button that says “Actions”. This button will provide you with the following options:

### GENERAL

- **Review Screening Question Answers:** You have the ability to review the answers to the supplemental questions from all applicants. You can identify which applicants answered a specific way by selecting on the hyperlink of the answer.

- **Download Screening Question Answers:** You have the ability to export the answers to the supplemental questions into a Microsoft Excel spreadsheet.

- **Export results:** You have the ability to export the information from the applicants’ materials into a Microsoft Excel spreadsheet.

### BULK

- **Download Applications as PDF:** You have the ability to export all application materials including attached documents from all applicants into one PDF file.
Create Document PDF per Applicant: You have the ability to export all application materials including attached documents for each individual applicant into individual PDF files.

Take Action On Job Application:

In order to request an interview of an applicant for your position, you must have Search Coordinator access for the designated search. If you are not the Search Coordinator, you can either skip this section or contact your AAC to request access. **NOTE:** Please be aware that actions are based on individual applicants and not the entire pool of applicants.

If you are the Search Coordinator, you have four actions that you can take on an individual applicant:

- **Keep working on this Job application:** You can continue to review the applicant’s application material without taking any actions.

- **Recommend for First Interview:** After reviewing the applicant’s application material, you would like to proceed with an interview. You can move the applicant forward in the interview process. The applicant will be sent to the AAC for review.

- **Does Not Meet Minimum Qualifications:** After reviewing the applicant’s application material, you determine that they do not meet one of the Minimum Qualifications of the position. **NOTE:** If you choose this option, an automatic e-mail will be sent to the applicant after the AAC approves the first interview and you will no longer be able to consider this applicant.

- **Not Interviewed, Not Hired:** After reviewing the applicant’s application material, you determine that they meet the Minimum Qualifications of the position but do not possess the necessary qualifications to proceed with an interview. **NOTE:** If you choose this option, an automatic e-mail will be sent once the position has been filled.
*Candidates not moving forward for an interview but still under consideration by the committee should be kept in the current process stage and not moved. This is similar to being kept on “Reserve”.

**Does Not Meet Minimum Qualifications:**

If you determine that the applicant does not meet the Minimum Qualifications of the position, you will select “Does Not Meet Minimum Qualifications”. A pop-up window will appear asking you to confirm moving this applicant to “Does Not Meet Minimum Qualifications”, then select “Submit”.

Once again, if you choose this option, an automatic e-mail will be sent to the applicant after the AAC approves the first interview and you will no longer be able to consider this applicant.

**NOTE:** Only eliminate candidates based on Minimum Qualifications if they clearly do not meet a specific Minimum Qualification. Ideally, Minimum Qualification eliminations occur when a specific quantifiable Minimum Qualification (e.g. specific degree, number of years of experience) is not met.
Not Interviewed, Not Hired:

If you determine the applicant does meet the Minimum Qualifications of the position but is not qualified to receive an interview, select “Not Interviewed, Not Hired”. A pop-up window will appear asking you to confirm moving this applicant to “Not Interviewed, Not Hired”. Utilize the drop-down menu to select your reasoning for no longer considering the applicant. This field is required. Once this is complete, then select “Submit”.

Once again, if you choose this option, an automatic e-mail will be sent once the position has been filled.

Recommend for First Interview:

If you would like to request approval to interview the applicant after reviewing their application materials, select “Recommend for First Interview”. A pop-up window will appear asking you to confirm moving this applicant to “Recommend for First Interview”, then select “Submit”. This applicant will proceed to the AAC and HRAI for review and approval. Once approval is received from HRAI, you can then contact your applicant to set up an interview.
Requesting Additional Interviews:

**NOTE:** If you do not wish to conduct additional interviews, you can skip this section and move to “Recommend for Hire”.

After interviewing your applicant, if you wish to conduct an additional interview, you can request additional interviews in the system. You can do so by selecting “HRAI Second” if requesting a second interview, or “HRAI Third” if requesting a third interview. A pop-up window will appear asking you to confirm moving this applicant to “HRAI Second” or “HRAI Third”, select “Submit”. Once you receive approval from HRAI, you may contact your applicant to set up an interview.
HIRING PROPOSAL

The Hiring Proposal is the form and process that allows you to recommend and gain approvals to hire an applicant.

Recommend for Hire:

After conducting your interviews and determining which applicant you would like to extend an offer to, you will select “Recommend for Hire” within the application. This will send the applicant to the AAC to start the Hiring Proposal.

*If you are a Search Coordinator or Search Committee Member, your role is complete unless the offer is declined.

Starting and Editing Hiring Proposal:

1. The AAC will initiate the Hiring Proposal by selecting the **Start Hiring Proposal** link on the successful applicant’s application.

2. A list of positions within the University will appear on the next page. Your posting with will be automatically selected with the radio button. Select the “Select Position Description” button.

3. You will be taken to the “Editing Hiring Proposal” form.
Applicant Tracking Module

Hiring Proposal:

The applicant and position information will default into the Hiring Proposal form. Please verify that all of the applicant’s information and the position details are accurate. None of the fields are editable. If a field is incorrect, please go back and select either the correct applicant or position. Click Next to save and move to the next screen.

Funding:

Funding

* Required Information

Funding Type: Permanent
BudgetIndex: ABC001
Percentage: 100
Activity Code:
Account Code: E4105
Proposed NBAPBUD Salary: 30,000

Remove Entry?
Add Funding Entry

Position Control Information

Grand Total Proposed NBAPBUD Salary (all funding sources): 30,000

Funding Comments

Position Control Comments
Applicant Tracking Module

The original funding and budget information will default from the Position Management module. If the funding is still the same, then click **Next** to save and move to the next screen.

If the budget or funding will be different after initial discussions regarding salary, you can make your updates here. Once your updates are complete, click **Next** to save and move to the next screen.

**Hiring Information:**

<table>
<thead>
<tr>
<th>Hiring Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>* Check spelling</td>
</tr>
<tr>
<td>* Required Information</td>
</tr>
</tbody>
</table>

**Hiring Information**

- **Proposed Start Date**
- **Contract End Date**
- **Requested Salary**

*This field is required.*

- **Justification For Requested Salary**
- **Approved Salary**
- **Executive Approver Comments**

**Offer Negotiation**

- **Negotiated Salary**
- **Negotiation Comments**

**Hiring Proposal Number**
The Hiring Information will indicate the Proposed Start Date and requested salary information.

Proposed Start Date: Using the calendar feature in the field, select what you determine the proposed start date might be. This field is for an approximation and not an exact date. This is a required field.

Contract End Date: Select the date when the contract will end. This is only for grant-funded positions with a defined end date. This does not apply to Exempt positions that are on annual salary agreements.

Requested Salary: Indicate the initial salary offer to the candidate. This may not be the final agreed salary. This is a required field.

Justification for Requested Salary: If you plan on offering more than the one-third mark of the Pay Grade for the position, you will add your justification for offering above that amount here. If you do not plan on offering over the one-third mark of the Pay Grade for the position, you may not need to enter a justification. Please check with your AAC for department-specific approvals.

Approved Salary and Executive Approver Comments: These fields are editable only by the Executive Approver (or their designee). They will put in the approved salary amount.

Negotiated Salary: If the salary during the negotiations with the candidate is different than what was originally requested, you can indicate the salary amount here. This field will be completed by the AAC. NOTE: If at this point, the negotiated salary is higher than the originally approved salary and is over the one-third mark of the Pay Grade, further approval is required from the Executive Approver. If any offer is below the one-third mark of the Pay Grade, check with your AAC regarding internal approvals.

Negotiation Comments: Add in any comments regarding the salary negotiation necessary for the Executive Approver.
Applicant Tracking Module

Supervisor:

The supervisor information will default from the Position Management module. If you need to change the Supervisor, select the position responsible for supervising the new position. You can select Filter these results to search the list by PCN number, current supervisor name, title, etc.

Select the radial button of the correct supervisor then select Next to save and continue to the next screen.

Hiring Proposal Documents:

Upload the offer letter that will be given to the hired candidate. This document does not need to be uploaded at the initial request of the offer.

Upload the salary agreement that will be given to the hired candidate. This document does not need to be uploaded at the initial request of the offer.

Upload additional documents as required for this position.

Upload the travel agreement that will be given to the hired candidate. This document does not need to be uploaded at the initial request of the offer.

Click Next to save and move to the next screen.
Background Check:

This section will indicate when the background check has been completed and whether the results were satisfactory. Human Resources will complete this form.

Hiring Proposal Summary:

Review the summary information of Hiring Proposal information. If section is completed correctly, it will be accompanied by a blue check mark.

An orange exclamation point to the left of a section indicates that required information is missing. Select the blue Edit link for that section to go back and make the required updates. Select Save or Next to save and continue. After saving you can move to the Hiring Proposal Summary to review the final information for additional errors.
Routing / Take Action on Hiring Proposal

When you are ready to send your completed Hiring Proposal, press the “Take Action On Hiring Proposal” button in the upper right. You will receive multiple options on what action to perform. To move your completed Hiring Proposal forward to your Affirmative Action Coordinator (AAC), select “Send to AAC”.

You will receive a pop-up window to add any optional comments you wish to share with your AAC. **Note:** These notes are discoverable and will be seen by all approvers in the process.

You also have the option to add this Hiring Proposal to your watch list. This checkbox is automatically selected. If you do not wish to keep this position in your watch list, deselect the check box. Click on **Submit**.

Once you submit your completed Hiring Proposal, a unique Hiring Proposal Number will be assigned to your action. This number will be found at the bottom of the Hiring Proposal Details page. Record this number for future use.
Final Approvals

1. If the Supervisor/Manager completes the Hiring Proposal, the Hiring Proposal will then go to the AAC. Here the AAC has a couple of options:

   - **Hiring Proposal Canceled** – If the candidate at any point declines the offer or if the Hiring Proposal needs to be canceled, then choose this option.
   - **Approver** – If there are any individuals within the University who need to approve the hiring of the candidate, then choose this option. A pop-up window will appear with a drop-down box with all employees who have Approver access. Select one of these individuals and the Hiring Proposal will be sent to them for their approval.
   - **Executive Approver** – If you are planning on extending an initial offer over the one-third mark of the Pay Grade, you must send the Hiring Proposal to the Executive Approver to receive their approval.
   - **HRAI** – Once you receive all of the necessary approvals, you can move the Hiring Proposal forward to HRAI for their approval.
   - **Return to Supervisor/Manager** – If something needs to be edited by the Supervisor/Manager, you can return it to them here.

2. After the AAC approves the Hiring Proposal, HRAI and HR will review and approve the Hiring Proposal.

3. After HR makes the final approval, the Hiring Proposal will go back to the AAC and the department can make an offer contingent on a background check.
a. If during the negotiations of the salary with the candidate the amount goes above the one-third mark or more than the originally approved salary level, the AAC can send the Negotiated Offer amount to the Executive Approver.

4. After the contingent offer has been accepted, the AAC will send the Hiring Proposal to HR so the background check will initiated.

5. Finally, when the background check is complete, HR will send the completed Hiring Proposal to the AAC to confirm that the candidate is now hired.

6. When the AAC confirms the candidate is Hired, they will move the process to “Hired”.

If you have any further questions or need extra help, please contact your corresponding AAC or Human Resources Business Partner.
Workflows

Staff/Professional Postings

Staff/Professionals Postings can only be created from an approved action (Position Description).