University of Idaho

PeopleAdmin Training Guide
Student/Temporary Applicant Tracking Module
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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 Student/Temporary 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.
Login Information:

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

2. You will login with your current network login information.
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>Inbox</td>
<td>CENTER of Home Page upon log in</td>
<td>Displays all items requesting your attention (approval/review).</td>
</tr>
<tr>
<td>Watch List</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>My Profile</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>Module Type Selection</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>User Group Selection</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

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 Student/Temporary.

3. In the upper, right corner of the page, click the Create New Posting button.
4. A box will appear that will give three options:

![Create New](image)

Create from Position Type – Do not use this option.

Create from Title - Copies in general information from a title. You will need to provide specific information inside the posting. You will most often use this option.

Create from Posting - Uses an existing posting as a template and automatically copies in most information.

5. If you click on *Create from Title*, this will take you to a page titled “Student/Temporary Titles.” Select the appropriate title from the list.

6. If you click on *Create from Posting*, this will take you to a page titled “Student/Temporary Postings”. Select the appropriate posting that you would like to clone.

7. On the following page click ![Create Posting from this Title](image). This will take you to the New Posting Page.

8. Fill in the Working Title in the Position Title field at the top of the page. Your Executive Level, Mid-Level, and Department will automatically default. **NOTE:** If you have access to more than one Executive Level, Mid-Level, or Department, use the drop-down to select the appropriate area(s).
9. The “Accept Online Applications” will be automatically selected.

   Online Applications
   - Accept online applications?

10. “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.

11. Select the “Main Application” checkbox.

   - Main Application

12. 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.
Posting Details

Required information will be indicated by a red asterisk and a red box.

**POSITION INFORMATION**

The Banner Title and Working Title will default into the top of the page. The rest of the information must be filled in.

<table>
<thead>
<tr>
<th>Position Information</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Position Title</strong></td>
</tr>
<tr>
<td>Location</td>
</tr>
<tr>
<td>□ Moscow</td>
</tr>
<tr>
<td>□ Caldwell</td>
</tr>
<tr>
<td>□ Kimberly</td>
</tr>
<tr>
<td>□ McCall</td>
</tr>
<tr>
<td>□ Twin Falls</td>
</tr>
<tr>
<td>Division/College</td>
</tr>
<tr>
<td>□ Funding Type</td>
</tr>
<tr>
<td>□ FLSA Status</td>
</tr>
<tr>
<td><strong>Pay Range</strong></td>
</tr>
<tr>
<td><strong>Standard Hours per Week</strong></td>
</tr>
<tr>
<td><strong>Expected Start</strong></td>
</tr>
<tr>
<td><strong>Expected End</strong></td>
</tr>
<tr>
<td><strong>Full Time/Part Time</strong></td>
</tr>
</tbody>
</table>

Work Schedule Summary

<table>
<thead>
<tr>
<th>Work Schedule Summary</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
</tbody>
</table>
Location – Select the work location for the position. If the location is not listed, select Add Location and specify where the position will be located. More than one location may be selected, if necessary.

Division/College – select the Division or College where this position will be located. Also, if a shared position, this will allow you to select which College/Unit it will be serving. This field will be displayed on the announcement posting. This is a required field.

Funding Type – Select Permanent, Temporary Grant, or Temporary Non-Grant from the drop down box

FLSA Status – Since the position is a Student/Temporary, please select “Overtime Eligible.”

Pay Range – Indicate the anticipated pay or pay range for the position.

Standard Hours per Week – Enter the number of hours or range of hours per week the position requires.

Expected Start and Expected End Dates – Although these dates may be subject to change, enter the start and end dates expected at the time the announcement is created

Full Time/Part Time – Select if this is a full time or part time position from the drop down box.

Work Schedule Summary – Indicate an anticipated work schedule, if one is known.

POSITION RESPONSIBILITIES

Position Summary – Input the Major Function of the position into the textbox.
**RESPONSIBILITIES:** The responsibilities are the job duties/tasks performed by the position. The total percentage of time for all responsibilities should equal 100%. Select **Add Responsibilities Entry** to add each entry. **Note:** When you select “Add Responsibilities Entry” you may be automatically taken to the top of the page. You will need to scroll down to the appropriate section to continue completing the form.

Job Duty Function – enter the overall description of the duty. This is also known as a “By Statement”. Example: Provide customer service to department by:

Job Duties/Responsibilities – enter the list of responsibilities that are required to fulfill the duty outlined in the “Job Duty Function”.

Percentage of Time – enter the approximate percentage of time designated to the job duty. This should round to the nearest 5% interval.

Essential/Marginal – select whether this duty is an Essential or Marginal function as defined under the Americans with Disabilities Act. A description of what an Essential and Marginal function is located on the Human Resources website under “Recruitment”.

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**Note:** When you select “Add Responsibilities Entry” you may be automatically taken to the top of the page. You will need to scroll down to the appropriate section to continue completing the form.
Minimum Qualifications – enter the minimum qualifications required for the position.

Preferred Qualifications – enter the preferred qualifications for the position. These are known as the Additional Desirable Qualifications on the job description.

Physical Requirements & Working Conditions – specify bona fide and job specific physical requirements and special working conditions required for this position. Subject to review and approval by Human Resources.
### POSTING INFORMATION

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Search Coordinator</td>
<td>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 3.</td>
</tr>
<tr>
<td>Posting Number</td>
<td>(Will be assigned upon first saving posting)</td>
</tr>
<tr>
<td>Posting Date</td>
<td>This field is required.</td>
</tr>
<tr>
<td>Closing Date</td>
<td></td>
</tr>
<tr>
<td>Open Until Filled</td>
<td></td>
</tr>
<tr>
<td>Special Instructions to Applicants</td>
<td></td>
</tr>
<tr>
<td>Background Check</td>
<td>□ The department has determined this position requires a criminal background check.</td>
</tr>
<tr>
<td></td>
<td>□ The department has determined this position does not require a criminal background check.</td>
</tr>
<tr>
<td>Background Check Statement</td>
<td>The University of Idaho is an equal opportunity and affirmative action employer. It is the policy of the regents that equal opportunity be afforded in education and employment to qualified persons regardless of race, color, national origin, religion, sex, age, disability, or status as a disabled veteran or Vietnam-era veteran. It is also the policy of the University of Idaho to not discriminate based on sexual orientation.</td>
</tr>
<tr>
<td>EEO Statement</td>
<td></td>
</tr>
<tr>
<td>Quicklink for Posting</td>
<td><a href="http://uidaho-training.peopleadmin.com/postings/3681">http://uidaho-training.peopleadmin.com/postings/3681</a></td>
</tr>
</tbody>
</table>
Applicant Tracking Module

Posting Number – A posting number will be automatically assigned when the posting is saved.

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

Closing Date – Indicate the preferred closing date for the posting. Minimum requirements are:

Three (3) calendar days for Student/Temporary positions.

Open until Filled – If you would like to leave open until filled, select the checkbox 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 – Indicate if a background check is desired for this search.

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

### Advertising Venues

- Moscow Pullman Daily News
- Lewiston Tribune
- The Idaho Statesman
- The Spokesman Review
- The Times-News
- The Post Register
- Coeur d'Alene Press
- Indeed (indeed.com) (Free)
- Craigslist (craigslist.com) (Free)
- Association of Public and Land-Grant Universities (aplu.org) (Free)
- Idaho Department of Labor (labor.idaho.gov) (Free)
- Affirmative Action (Affirmativeaction.org)
- The Chronicle of Higher Education (chronicle.com)
- Higher Ed Jobs (higheredjobs.com)
- Sarasota Times Online (sarasotatimes.com)
- The Oregonian Online (oregonlive.com)
- Academic Keys (academickeys.com)
- Diverse Education (diverseducation.com)

*All jobs are posted on the Idaho website, some newspaper, etc.*

*"We cannot post to a listerv."*

### Additional Advertising Venues

### Advertising Dates

*(please provide dates for print ads)*

### Special Advertising Text

*If ad copy is not provided one will be created for your approval.*

### Coordinate with Job Elephant

- No

### Job Elephant Notes

### Advertising Budget Number(s)
Applicant Tracking Module

Advertising Venues – You can multi-select from this list. If your desired advertising venue does not appear, please use the “Additional Advertising Venues” field. There are no minimum advertising requirements for student and temporary postings. If you do not indicate additional advertising, the posting will appear on the University of Idaho website only.

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.

Advertising Dates – Indicate which dates you would like the advertising to run.

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

Coordinate with Job Elephant – 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).

Job Elephant 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.
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.
**Applicant Tracking Module**

**Evaluative Criteria**
We are not currently using this feature. We will provide more information in future version of this document.

**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.

Click **Next** to save and move to the next screen.
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.
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.

Posting was successfully transitioned, and it was added to your watch list.

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.
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 Student/Temporary.

3. You can locate your posting by either a) locating your search in the “Student/Temporary 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.
Reviewer 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.

- **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.

- **Recommend for 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.

*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”.*
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 for review and approval. Once approval is received from the AAC, you can then 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 page will appear asking you to initiate the Hiring Proposal. Press the “Start Hiring Proposal” button.

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

#### Hiring Proposal:

<table>
<thead>
<tr>
<th>Field</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Start Date</strong></td>
<td>Using the calendar feature in the field, select what you determine</td>
</tr>
<tr>
<td></td>
<td>the proposed start date might be. This field is for an approximation</td>
</tr>
<tr>
<td></td>
<td>and not an exact date. This is a required field.</td>
</tr>
<tr>
<td><strong>Contract End Date</strong></td>
<td>Select the date when the contract will end.</td>
</tr>
<tr>
<td><strong>Requested Salary</strong></td>
<td>Indicate the initial salary offer to the candidate. This may not be the</td>
</tr>
<tr>
<td></td>
<td>final agreed salary. This is a required field.</td>
</tr>
<tr>
<td><strong>Justification For Salary</strong></td>
<td>If you plan on offering more than originally advertised, please indicate</td>
</tr>
<tr>
<td></td>
<td>your justification here. Please check with your AAC for</td>
</tr>
<tr>
<td></td>
<td>department-specific approvals.</td>
</tr>
<tr>
<td><strong>Approved Salary</strong></td>
<td>These fields are editable only by the AAC. They will put in the</td>
</tr>
<tr>
<td></td>
<td>approved salary amount.</td>
</tr>
<tr>
<td><strong>Background Checks Completed?</strong></td>
<td>Select if background checks have been completed.</td>
</tr>
<tr>
<td><strong>Date Background Check Completed</strong></td>
<td>If background checks have been completed, enter the date.</td>
</tr>
</tbody>
</table>

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

- **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.

- **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 originally advertised, please indicate your justification here. Please check with your AAC for department-specific approvals.

- **Approved Salary**: These fields are editable only by the AAC. They will put in the approved salary amount.
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.

Click Next to save and move to the next screen.

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.
   - **HRS** – If a background check is required, the Hiring Proposal will be sent to Human Resources.
   - **Hiring Proposal Approved** – If a background check is not required, the AAC can forward the Hiring Proposal for approval and hiring.

2. If a background check is conducted and complete, HR will send the completed Hiring Proposal to the AAC to confirm that the candidate is now hired.

3. 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

Student/Temp Postings

- Supervisor/Manager
  - can initiate action
- AAC
  - can initiate action
- HRS
  - Approve for Later Posting
  - Internal/Invite Only
- Posted
  - Reposted
- Closed/Removed from Web
- Filled

HRS owns all of these statuses

- On Hold: posting can be placed on hold at any point by HRS
- Posting Canceled: posting can be canceled at any point by HRS