PeopleAdmin
Training for Departments

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SITE WEB ADDRESS/URL

PeopleAdmin URL: https://utah.peopleadmin.com/hr/shibboleth

You can also access PeopleAdmin by going to the University Human Resources website https://www.hr.utah.edu and clicking on the "Login to PeopleAdmin" under Managers/Administrative. Another option is to click on the PeopleAdmin icon at the top of the University Human Resources website:

KEY CONCEPTS

1. POSITION TYPES

Position Types are the core configuration in PeopleAdmin that allows for different:

- Online job posting forms
- Online application forms
- Workflows

At the University of Utah, there are four position types:

1. Benefitted Staff
2. Non-Benefitted Staff
3. Faculty
4. Campus Faculty

2. USER'S ROLE ASSIGNMENTS

- HR Service Team:
  - Access: Departments they support.
  - Role: Create and process postings, move applicants through workflow, and create and process hiring proposals.
- Department Admin:
  - Access: They can view jobs in their department(s).
  - Role: They can create job postings, move applicants through workflow, and create hiring proposals.
- Department Approver:
  - Access: They can view jobs in their department(s).

- Role: They can create job postings. They can view applications but not take action on them.

- Search Committee Member/Application Reviewer/Guest User:
  - Access: personal (they can only see jobs that are assigned to them)
  - Role: They can rank candidates, but cannot move them in the workflow
  - NOTE: this user type can be used as a "Guest User." If your "Guest User" is not a U of U employee, you will first complete the Affiliate form to obtain a uNID, then contact your HR Rep to create a user account for them in PeopleAdmin. Their username will be the uNID.
- Employee:
  - Access: Personal (they can only see jobs they have applied to or are assigned to them)
  - Role: Limited. If you are accessing the system to work on an application, you will want to ensure that you select another User Group from the drop-down menu.

GETTING FAMILIAR WITH THE SYSTEM

NAVIGATION BAR AND YOUR NAME BAR

INBOX

This is one of the most useful tools in the system for users. Each individual user has an Inbox which will contain all the items that require the user's attention, across all user roles they may possess. When in doubt, check your inbox.

WATCHLIST

You will notice that anywhere you see postings, you will have the ability to "Watch" an item by adding it to your Watch List.

WORKING WITH POSTINGS

OBJECTIVES:

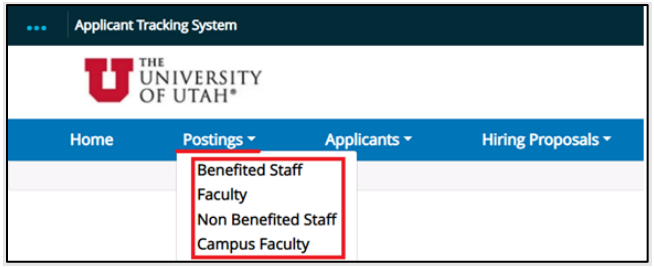
- Know how to create job postings
- View the postings you create on the applicant site
- Explain to others how to find postings on the web
- Understand where to find a posting that requires approval

TIP: *When you click on a hyperlink, you may get a message that says "There are unsaved changes on this page. Do you want to leave the page and lose all changes?" If you get this message, click "cancel," scroll to the top or bottom of the page, and click "save" on the right-hand side. Then, you will be able to view the hyperlink.*
Throughout this system, clicking on "Save" will save your work and keep you on the same page. Clicking "Next" will save your work and advance you to the next page.

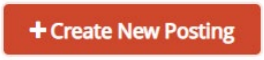
Step #1: CREATE A POSTING from a Title

Owner: Dept Admin or Dept Approver

- Titles pull from existing University of Utah job code tables.
- From the top **Navigation Bar** select "Postings" and then select the desired position type.



- Click on the **Create New Posting** orange link on the right side of the page.

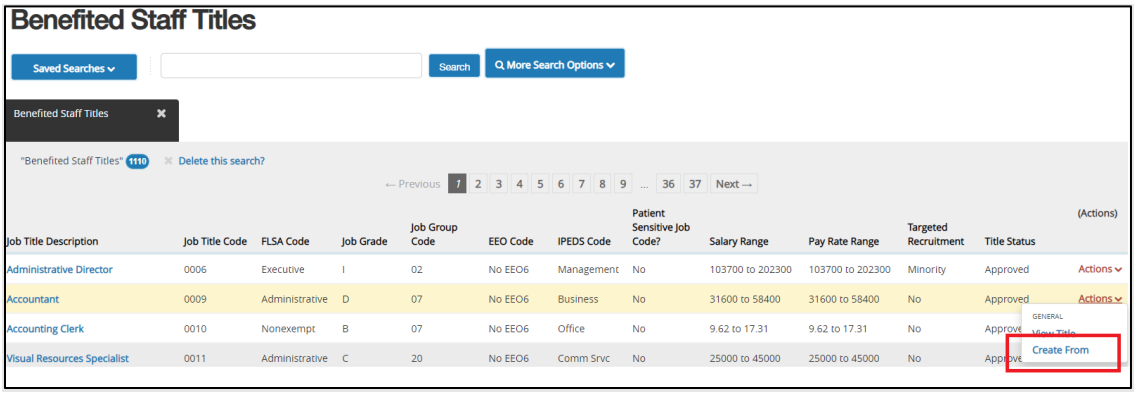


- Click on the **Create from Title** link.

NOTE: Any default data housed at the title level is pre-populated into your new posting. *This includes field data, required/optional questions, associated supplemental questions, and Pass/Fail message default text.*

"TITLES" Page

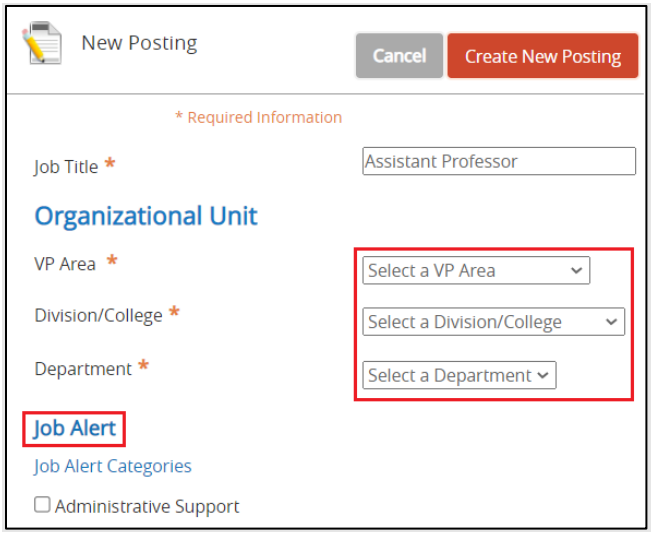
- Enter the **Posting Name** (Job Title) into the "search" field. The information should carry over to the next page.
- **Find the title you want, but DO NOT click on the title on the left, as this will open a new page.**



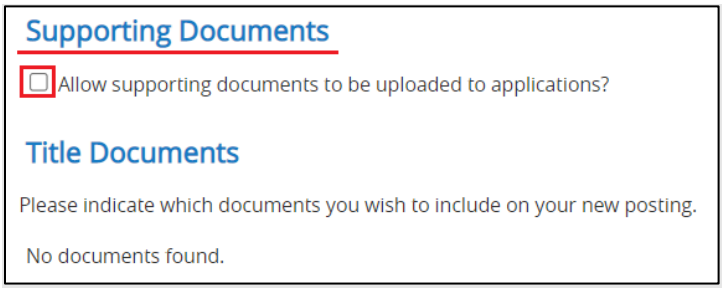
- **Instead, on the far-right hand side of the screen, across from the job title, is a blue "Actions" button. Hover over the "Actions" button, then click "Create From."**

"NEW POSTING" Page

- After the position opens, identify the **VP Area**, **Division/College,** and **Department**. (Note: for some users, there will only be one selection). Also select a Job Alert category. A Job Alert Category is required for a posting to be moved to posted, so please make sure you select the category.



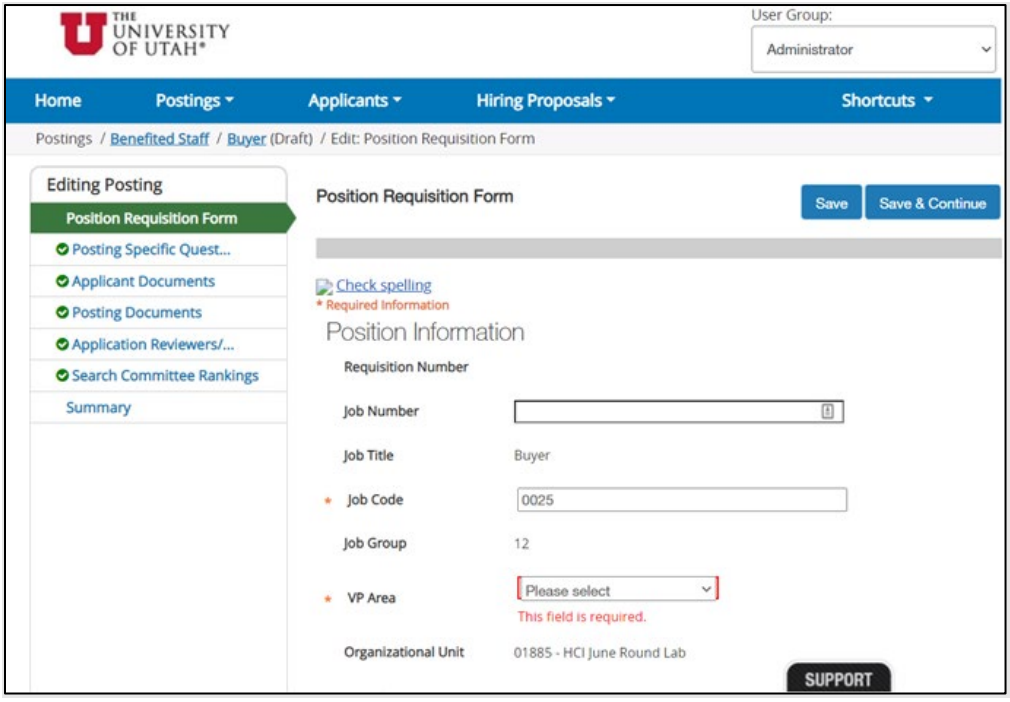
- **Supporting Documents:** When this box is checked, users can attach supporting documents to individual applications. These are internal-only documents: they cannot be viewed by applicants and are not considered part of the application. Supporting documents are commonly used for interview questions and notes, or other documentation not supplied by the candidate.



- Then, click the orange **"Create New Posting"** on the bottom right.

"POSITION REQUISITION FORM" Page

- This is the first page of the online form and will contain all the pertinent details for this posting.

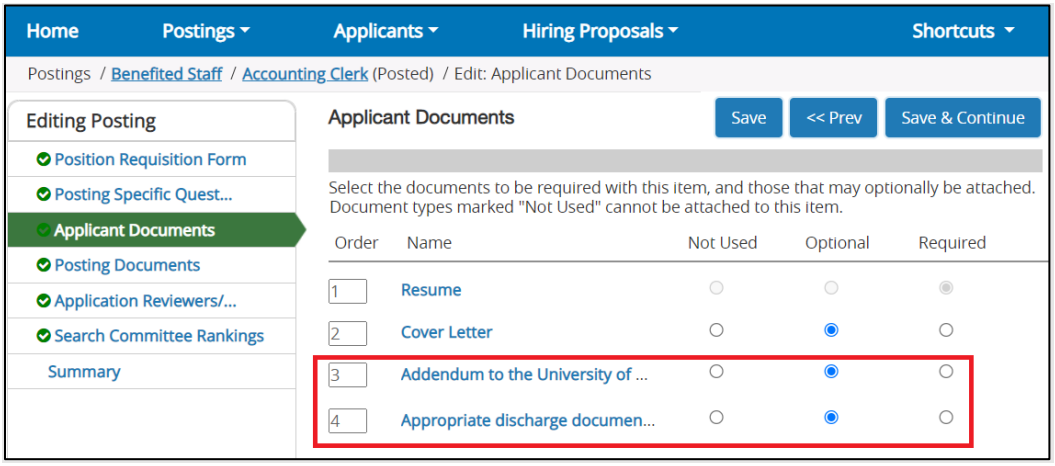


Fill out the information on this page to match the requirements for the position you are posting. An asterisk "*" will indicate the required fields. When you have completed this page, click the blue "Save & Continue" button found on the right-hand side on either the top or bottom of the screen.

Note: *You will see a menu bar on the left-hand side of your screen as you are completing the online Position Requisition Form. This bar shows all the sections of the form. The section you are working on is highlighted in green. The other sections will have either a checkmark or a red "X" next to it. The red "X" indicates that information is missing (for example, a required field has not been filled in).*

- "This position reports to" and "Reports to ID" are required so that HR can ensure the proper person receives the X month/s probationary period emails.

- You must acknowledge that you will forward the Veteran's Preference process to the hiring manager. If any applicants to the job posting have Veteran's Preference, the department will need to adhere to the process. If you have any questions, please contact HR. These are the documents used for Veteran's Preference:



- For many job codes, the "Job Summary" field will be blank. Please complete that section with a summary relevant to your posting and department, so that the applicant will have a better understanding of the job.

- The "Quicklink" can be used for recruitment. The link will go live when the job is posted and takes applicants directly to the job posting in PeopleAdmin's applicant portal, so they do not need to search for the job. The "Quicklink" will be included in postings on external job boards and can be sent directly to candidates or other recruitment sources.

TIP: *If you wish to "copy & paste" information into the "Job Summary" box, please paste the content into a text editor (e.g., Note Pad) first, then copy the content from there to paste into this online form. This will retain your formatting. For assistance, contact HR.*

"POSTING SPECIFIC QUESTIONS" Page

Adding a Question:

- University HR has already loaded required questions for job codes to the question bank.
- If you want to add other "supplemental questions," you may search for existing questions or create a new question and add it to the bank.
    - To search the existing questions, click on the orange **Add a question** link. Then, filter your search by **Category** or **Word**. **Categories** are: None, Credential, Education, Experience, Knowledge, Language, and Physical.
    - To create and add a new question, click on the blue **Add a new one** line in the bottom right corner.
        - **Name** the question using the following format:

4-digit job code (space) job title (you may abbreviate) (space) 3-digit category (e.g., EXP or EDU) plus a 1, 2 etc. if there are multiple questions. You will need to add your org ID to the end of the question.

Examples:

- 0008 Manager EXP1
- 0008 Manager EXP2 00410

This naming format allows you to search or categorize questions more easily:

- Status will be "Pending" until HR reviews the question.
- Select a **Category**
- Add the Question text
- Select the answer type under **Possible Answers** on the bottom left.
    - Selecting **Open Ended Answers** gives applicants a free-text field for answering the question.
    - Selecting **Predefined Answers** will prompt a menu of possible answers. The default is two answer choices, but there is no limit.

***Note**: Each time an answer choice is filled in a blank answer choice appears. All answer choices that appear do not have to be filled to create the question. If you delete an empty answer choice box, another will appear.*

- Fill in the predefined answer choices and select **Submit**.

***Note**: Selecting **Cancel** on this screen will take you out of the Add a Question screen.*

- Once the question is saved, you will be brought back to the **"Posting Specific Questions"** page and see the question listed under **"Included Supplemental Questions."**

- Supplemental Question Options:
    - **Position** – Allows you to reorder questions
    - **Required** – Makes the question required on the Posting
    - **Category** – Shows the name selected from the category dropdown menu

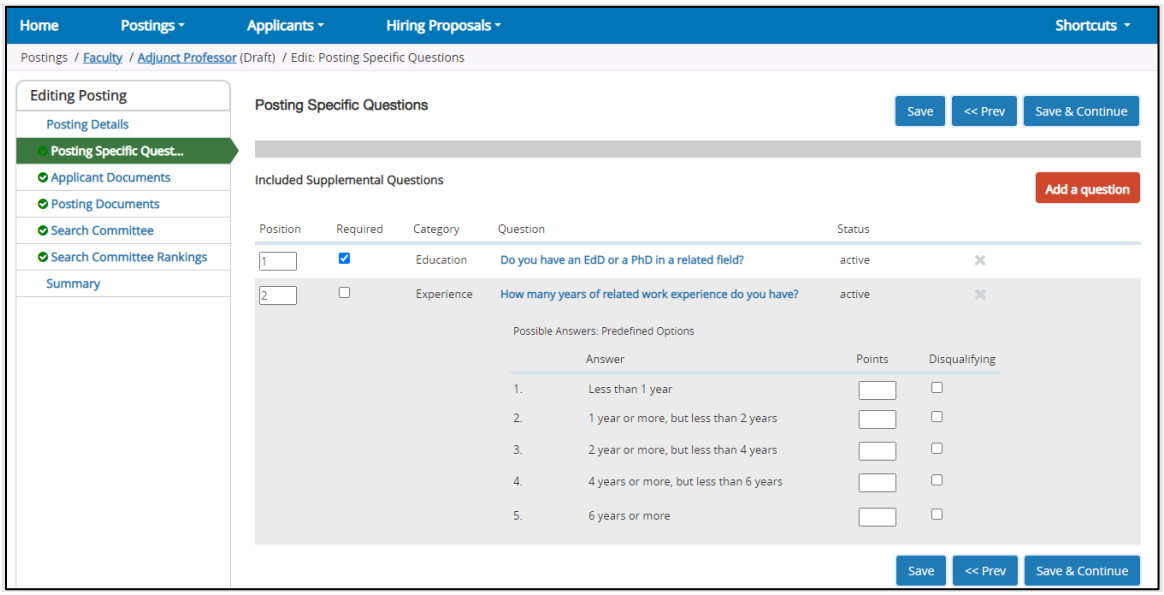
- **Question** – Shows the selected question
- **Status** – Shows the approval status of the question

TIP: *Do not add supplemental questions after the job is posted and applicants have applied, as the system will not apply these retrospectively.*

Notes: *Department-created questions remain at a draft/pending state until HR reviews the question. No other users in the system will have access to use the question until it has been reviewed.*

Using Points, Weights and/or Disqualifiers with Supplemental Questions (Optional):

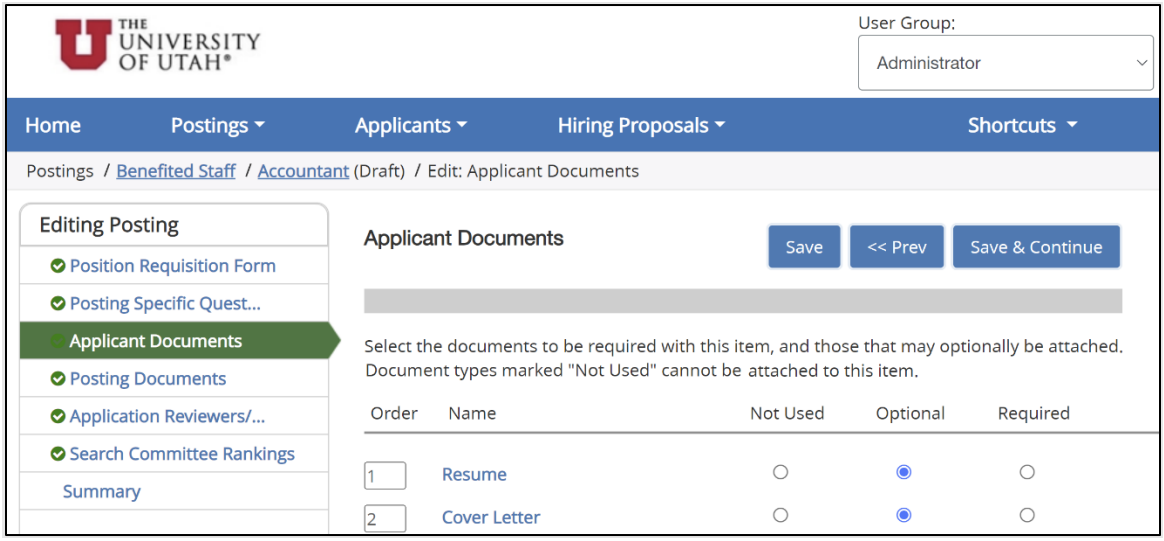
➢ Click on the title of the question in blue to see the possible answers to the question.



- **Possible Answers:** Will show whether an applicant answer options are Predefined or Open-Ended.
  - For questions with Predefined Options, you can assign points or mark an answer choice as a disqualifier.
- **Disqualify Options:**
  - HR recommends that you do not use “disqualifying”, as you will not be able to see applications of the applicants who answer in a way that disqualifies them.
  - If you decide you would like to use this option, please consult HR.
  - Only use “disqualify” to assess specific requirements that are listed in the “Qualifications” section of the job description.
- Click on the title of the question in blue to hide the question detail options.
- When you have completed this section, click on the blue **Save & Continue** button.

“APPLICANT DOCUMENTS” Page

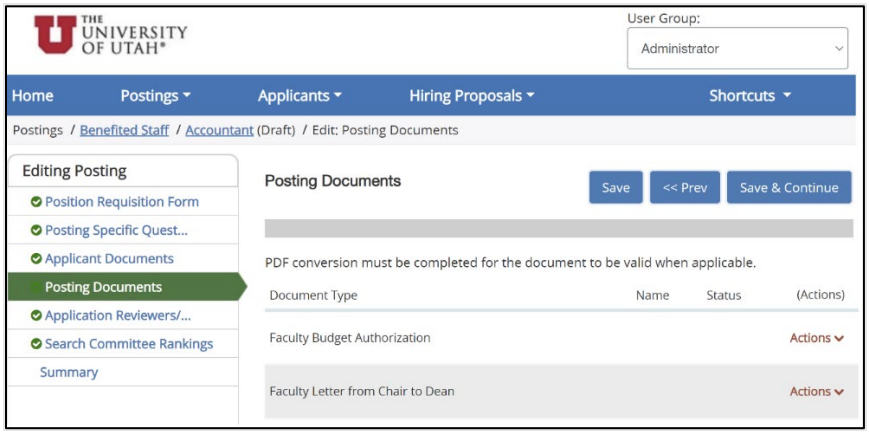
This page will show you a list of documents that you can request or require of the applicant during the application process.



- **Not Used**: If this box is checked, the applicant will not be given the option to attach the specified document.
- **Optional:** Checking this box will give the applicant the option to attach the specified document but will not require the applicant to attach the document to proceed with their application.
- **Required:** Checking this box will require the applicant to attach the specified document to proceed with their application.
- You have the ability to reorder the documents.

“POSTING DOCUMENTS” Page

On the Posting Documents page, you will see the available documents that you may attach to the posting as relevant for internal Department Approver, or HR use – these documents are not viewable by the applicant.



- To add a document, click on the orange **Actions** button to the right of the Document name.
- You can upload a document, create one from scratch, or use a document already in the system.
- If you upload a document, default information will pre-populate in the **Name** field, or you have the option to change the name of the document that is being attached.
- Indicate a document **Description**.
- **Browse** for the file that needs to be uploaded and then select **Submit**.

Notes: *Once you hit Submit, you should be back at the main Posting Documents page. The name of your document will appear under the main document name.*

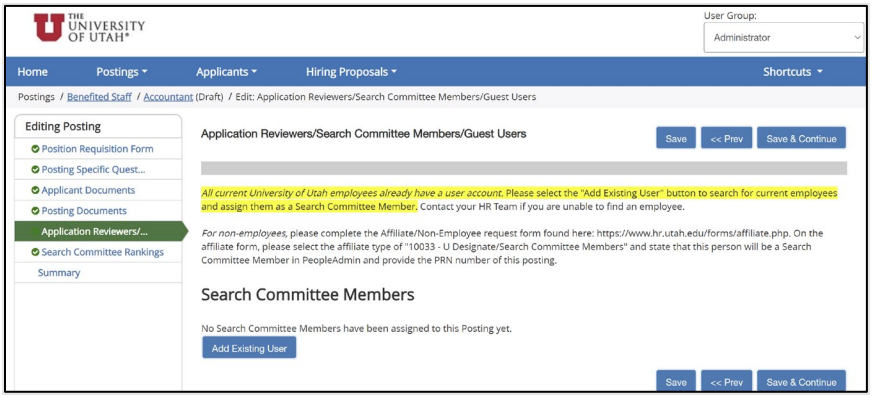
You will have a link to the document that was attached. Click on the link to view the document

*A message may appear that reads **'conversion in process'** which means that the document is converting to a pdf file format, and it may take a few minutes to complete depending on the size and/or format of the document you have uploaded.*

You can continue to either upload additional documents if needed or move forward in the posting creation.

"APPLICATION REVIEWERS/SEARCH COMMITTEE MEMBERS/GUEST USERS" Page

You can add people to review applications, to be on a search committee, or be a guest user with view only access to applications.



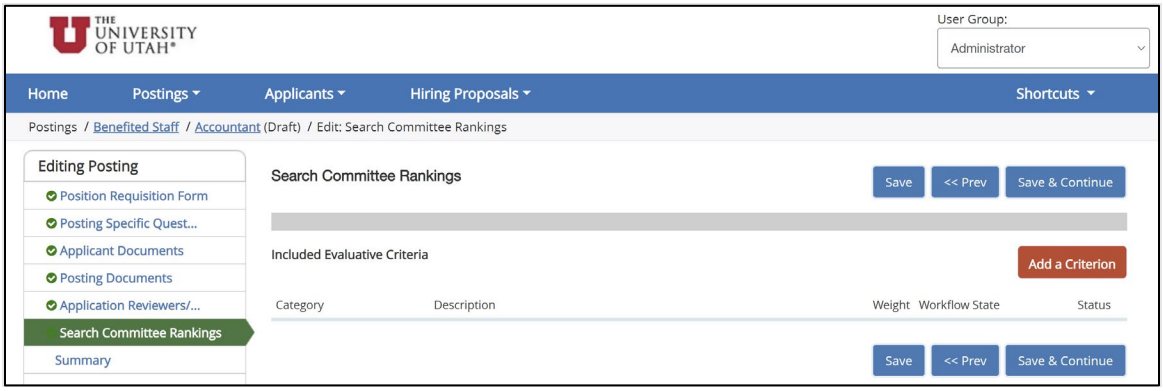
- To add a search committee member, select the blue **Add Existing User** button. A new window will pop up. From there you may search for an existing user (all current University of Utah employees) by first name, last name, and/or email address. When you locate the name, you are searching for, click the blue **Add Member** button.
- For non-employees, please complete the Affiliate/Non-Employee request form found at https://www.hr.utah.edu/forms/affiliate.php and state that this person will be a Search Committee member in People Admin and provide the PRN number of the posting.

TIP: *Outside of assigned workflow roles, as defined on pages 3-4 above, any person who needs to be able to view applications must be added in this section.*

Note: *HR must process new users in the system.*

"SEARCH COMMITTEE RANKINGS" Page

Using Ranking Criteria (Optional)
Owner: Search Committee Chair



TIP: *For assistance with this process, contact your respective PeopleAdmin subject matter expert.*

You can add ranking criteria for search committees to use while evaluating candidates. You can add ranking criteria to a posting in two ways. You can create new ranking criteria or search and add existing criteria to the posting.

- **Option #1:** To add a new criteria select the orange **Add a Criterion** link to the right of the "Included Evaluative Criteria" heading. A new window called "Available Evaluative Criteria" will open.
  - Click on the **Add a new one** link at the bottom of the "Available Evaluative Criterion" screen.
  - Fill in the Name, Label and Description of the criterion.
  - Choose if this is an open ended or predefined answer criterion.
  - Click the gray **Submit** button.
  - The criterion is added to the list. Now click on the **blue** description.
  - Select the applicant workflow step at which you wish to notify the search committee to evaluate applicants against ranking criteria.
  - Fill in the **weight** and **points** needed for the answers and click **Save**
- You can add as many criteria as you wish and have different criterion for different applicant workflow steps to evaluate your applicant pool.

  OR:
- **Option #2:** To add existing criteria, click the orange **Add a Criterion** button on the right. A new window called "Available Evaluative Criteria" will open.
  - Use the **Keyword** search
  - Search for criteria that were created earlier, and you should see criteria returned.
  - Click on the criteria description and select an applicant workflow state of that is associated with the ranking criteria
  - Click the **Add** box on the left to add the criteria and click the gray **Submit** button.

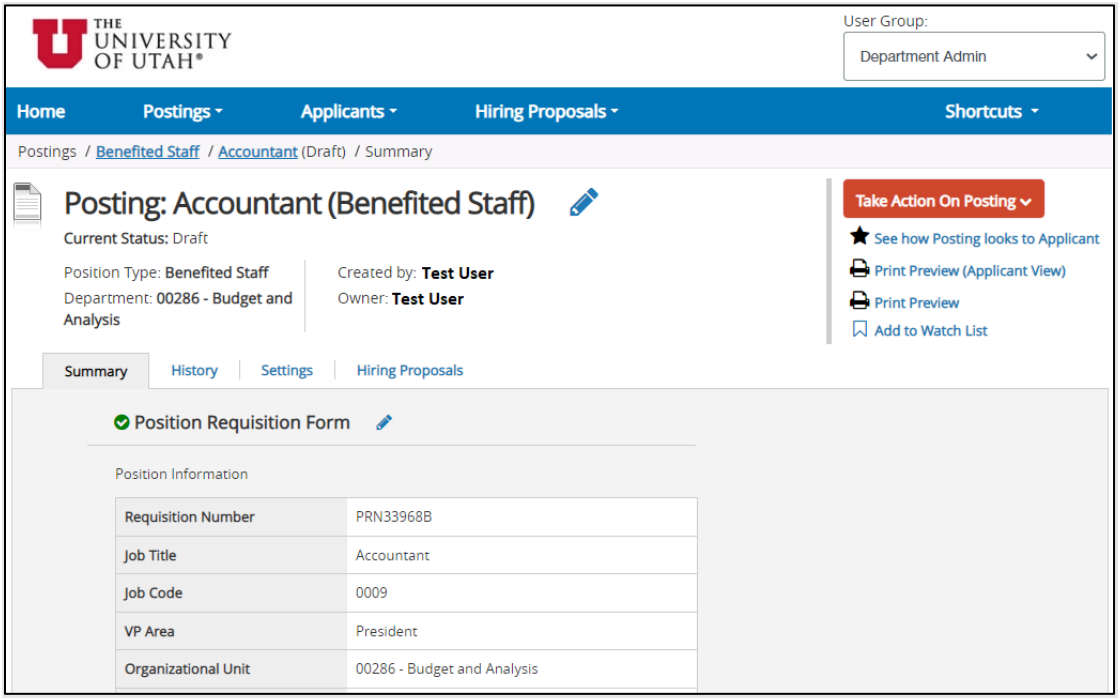
- You can now add the weight for this question as well as assign points to the answer selections and click on the **Save** button.

Notes: *If there are no created Rankings Criteria in the system, you will have to go through the process of adding and approving ranking criteria before you will be able to add existing criteria.*

You can create different Ranking Criteria and associate different applicant workflow states. When evaluating applicants, ***only*** *the applicants that are at the associated applicant workflow state on the ranking criteria will appear. The applicant(s) will no longer appear on the evaluation page once the applicant workflow state is changed.*

"POSTING" Page

You are now on the final page of the online posting form. You will see the job title and position type (e.g., Benefited Staff, Non-Benefited Staff, or Faculty).



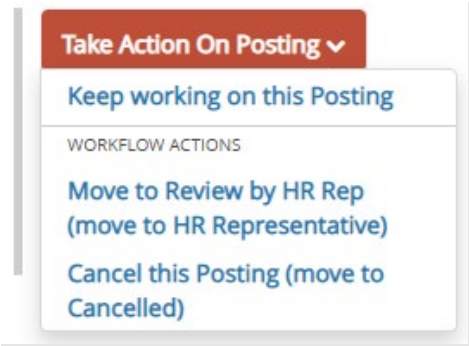
- To correct any issues with your form before submission, click on the blue **Pencil** icon.

Applicant Preview

- To get a preview of what the applicant will see when reviewing this job posting on the Applicant Portal, select the blue **See how Posting looks to Applicant** link under the orange **Take Action on Posting** button in the right-hand action pane.

Submit to next approval step (Workflow Actions of the Posting)

- In the right-hand action pane, if you hover over the orange **Take Action on Posting** button, you will see your options for moving the posting on in the workflow. Select the next state to which you would like to send the posting.



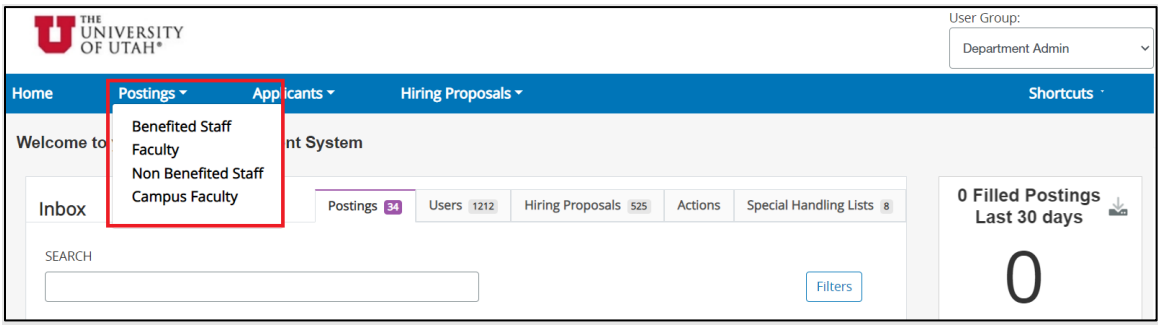
NOTE: *These options will be different based on the position type.*

- You may enter a comment for the next approver in the workflow. This message will show up in the posting transition email as well as the Notes/History section of the posting.
- You have the ability to add this posting to your **Watch List** by checking the box located in the **Comment** section.
- Select **Submit**.

Step #2: REVIEWING APPLICANTS

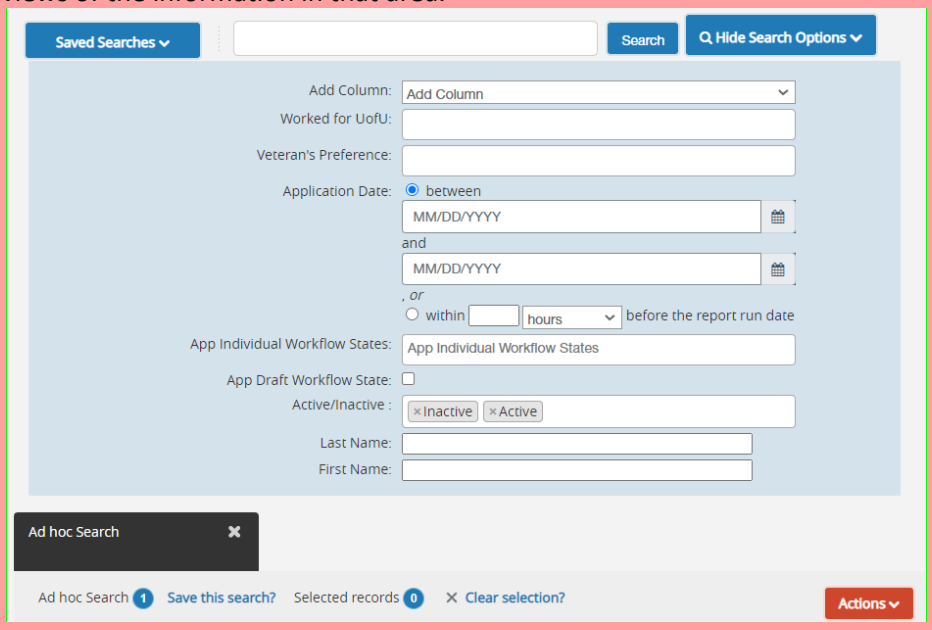
Owner: Dept Approver, Dept Admin, plus anyone you assigned as an Applicant Reviewer/Search Committee Member/Guest User

- Click on Postings on the top menu bar and select the appropriate position type.
- Search for a job.



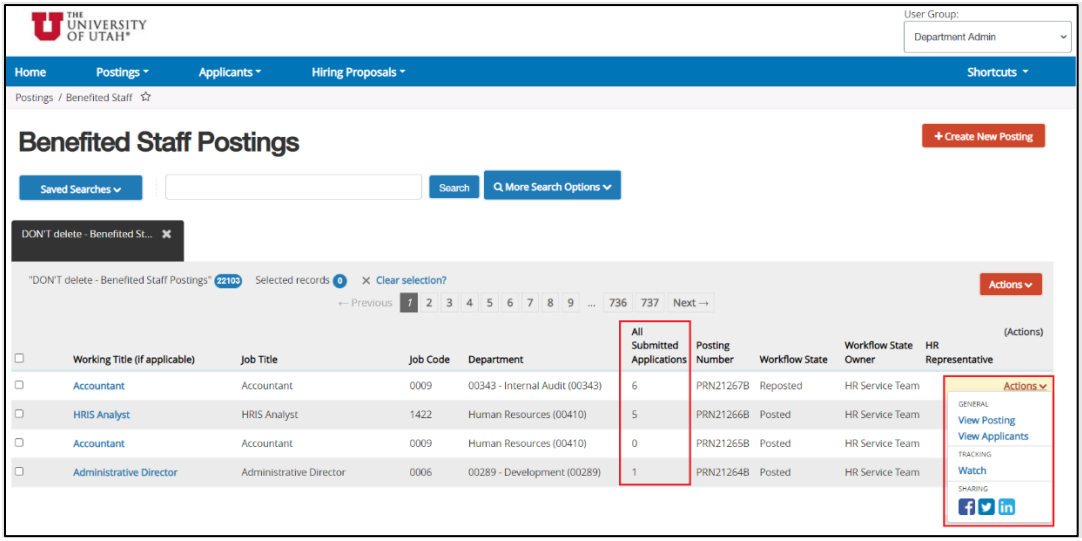
SEARCHING/VIEWS

For every area of the system, users will have keyword search ability plus the power to create personalized views of the information in that area.



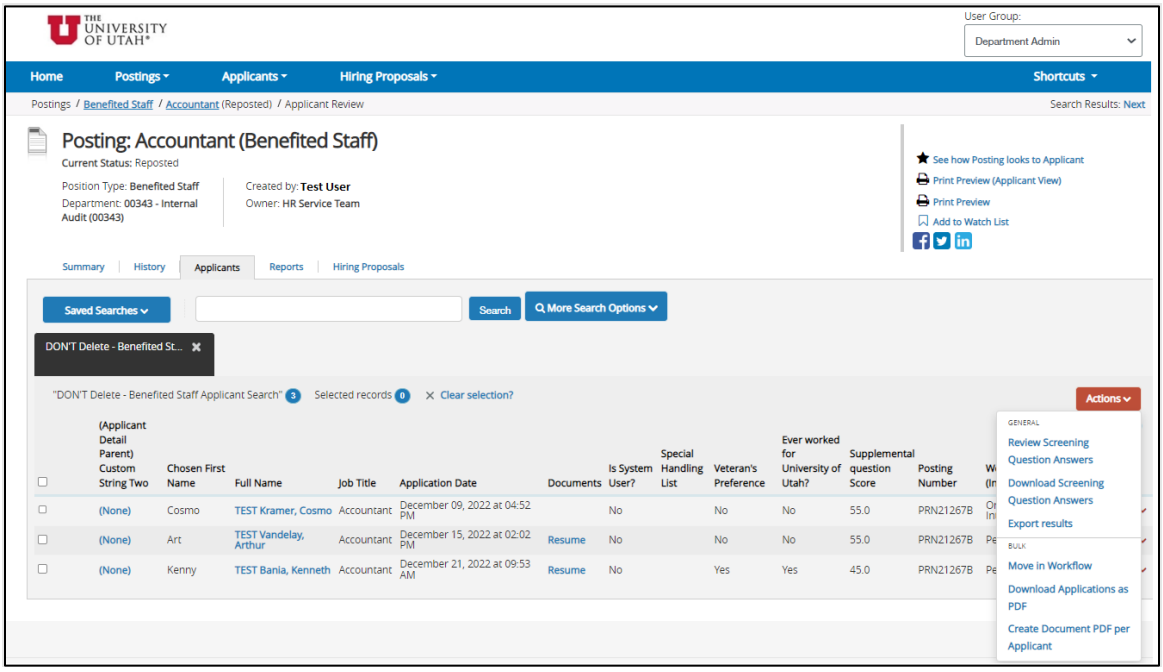
A view is a collection of search criteria and the columns contained in the search results. You have the choice to create as many permutations of these views in the system as you like and save them for your personal use.

- When the job (or jobs) display, view the "All Submitted Applications" column to see how many people have applied.

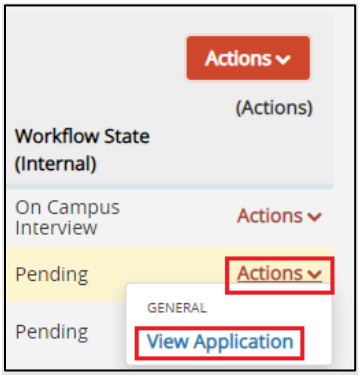


- There are two ways to get to the **Applicant Review** Screen:
  - To view the applications, click on the blue job title name link on the left, and then on the following page, click on the blue **Applicants** link. **OR**

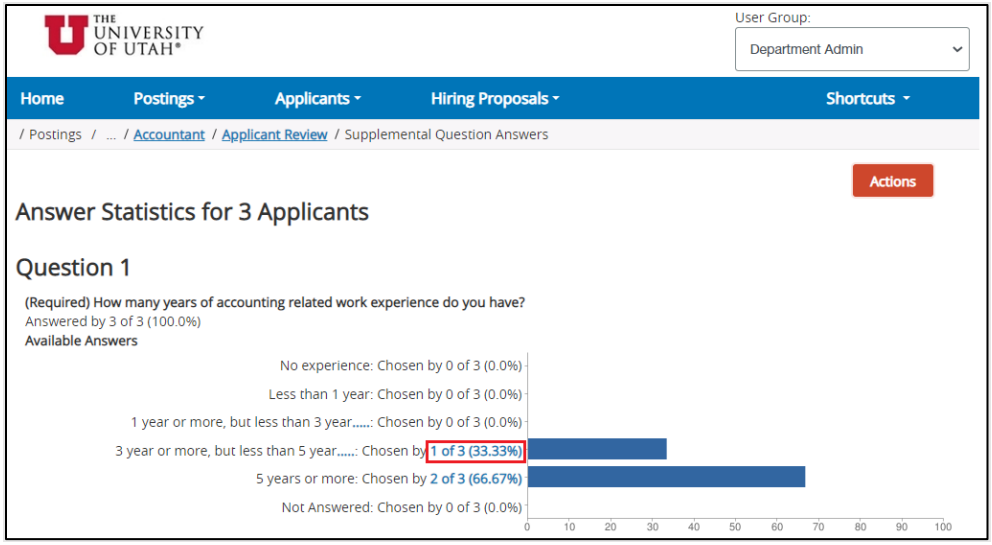
- You can hover over the orange **Actions** link on the right side of the job title then select **View Applicants**.



- From the **Applicant Review** screen, you will be able to perform several actions.
  - To review an applicant's application, answers to the supplemental questions, and attachments, you may either:
    - Click on the applicant's name, OR
    - Hover over the orange **Actions** button on the far right of the screen across from their name and select "View Application".

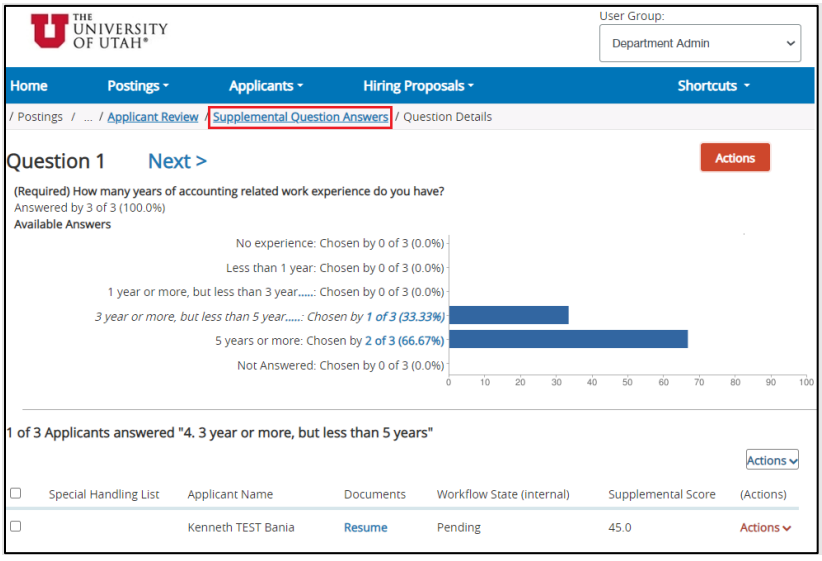


  - You may "Review Screening Question Answers." To review the answers statistics for the Screening Question answered by applicants, select the applicants you would like to see answers for by clicking in the box to the left of the applicant's name (if you would like to include all applicants shown on that page, click in the box to the left of "Full Name). Now click on the **Actions** button and select **Review Screening Questions Answers**. You are now on the **Answer Statistics** page.



***TIP**: Anything in blue font in the system is a hyperlink.*

- To see how applicants answered the questions, you have two options:
  - You will see blue links within the questions that indicate how many applicants answered the question a certain way. Click on those blue links to see the names of the applicants. OR
  - Hover over the orange **Actions** button and select **Search Answers** to search for the answers to specific questions.
- To return to the previous page, you will see a gray menu bar. Click on the blue "Supplemental Question Answers" link



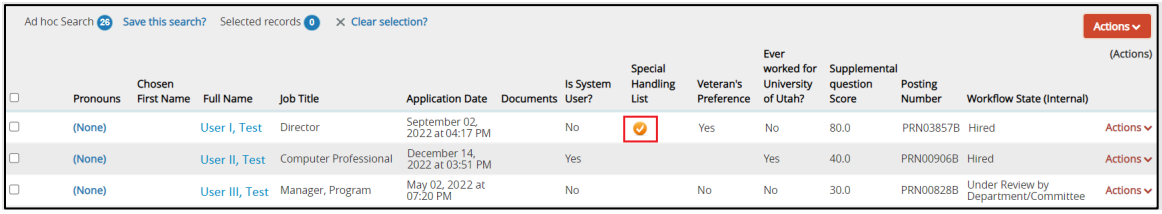
- If you want to export the answers to an excel spreadsheet, hover over the orange **Actions** button, and click on **Export Answers**. This will export the answers but not the applicant names.
- To get back to the **Applicant Review** page, you can:
  - Hover over the orange **Actions** button and select **Show All Applicants**

OR

- From the gray menu bar, click on the blue “Applicant Review” link.

➢ If you see a checkmark in the column labeled “Special Handling List” (sometimes called “Restricted List”,) please email your HR Rep with the Job Posting Number to find out the applicant’s status which may be:

- Disciplinary Action.
- Certified Veteran’s Preference (Follow the Veteran’s Preference process: https://www.hr.utah.edu/forms/lib/Vet_Pref_Addendum.pdf).
- RIF (They have RIF interview preference for 6 months).

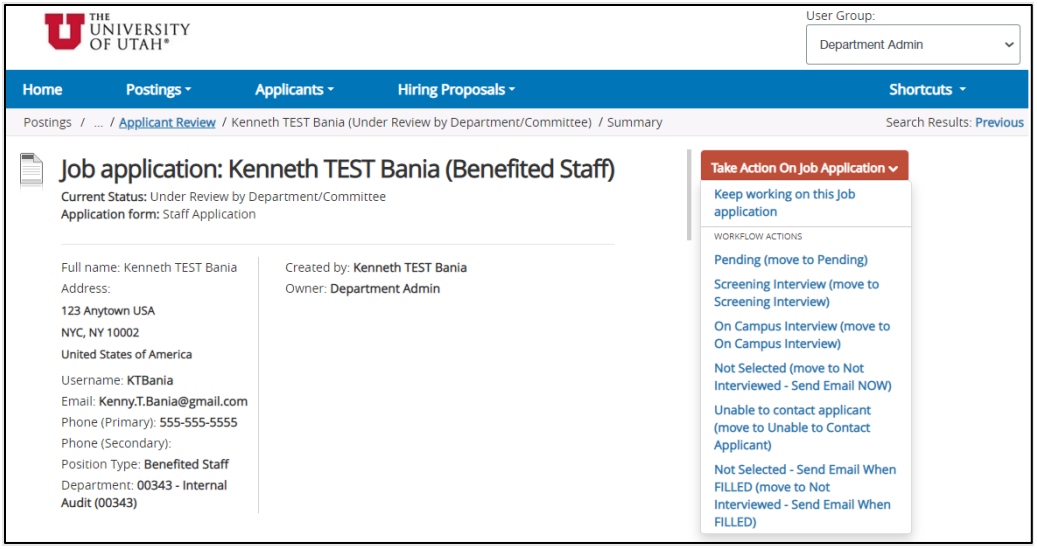


Step #3: MOVE APPLICANTS THROUGH APPLICANT WORKFLOW (SCREENING/SELECTION PROCESS)

Owner: Dept Admin, and HR

➢ When you are ready to move the applicants through the workflow, you will use the orange **Take Action On Job Application** button on the right. The initial workflow options are:

- Keep working on this job application
- Pending
- Screening interview
- On Campus Interview
- Not Selected – Send Email
  - This action will automatically and immediately send an email to the applicant letting them know they were not selected for the position.
- Unable to contact applicant
- Not Selected – Send Email When FILLED
  - This action will automatically send an email to the applicant letting them know they were not selected once the position has been filled.



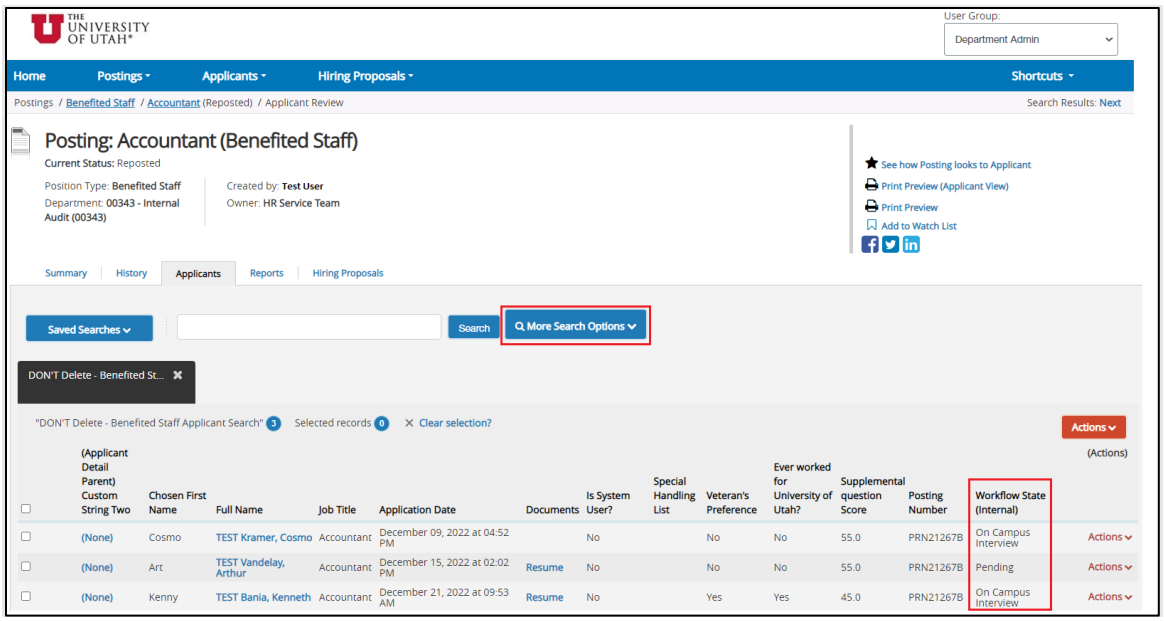
Note: The titles of the drop-down options may appear twice, e.g., "Pending (move to Pending)". This convention is defined by the system but may be resolved in a future release of the product.

- After an applicant has had the "On Campus Interview", the following workflow options will be available:
  - Keep working on this job application
  - Interview-Not Selected-Send Email When Filled
    - This action will automatically send an email to the applicant letting them know they were not selected once the position has been filled.
  - Interview-Not Selected-No System Email
    - This action will not automatically send an email to the applicant to let them know they have not been selected. You may use this option when you wish to inform the candidate of the decision personally.
  - Interviewed Not Selected-Send Email NOW
    - This action will automatically and immediately send an email to the applicant letting them know they were not selected for the position.
  - Move to Conditional Offer

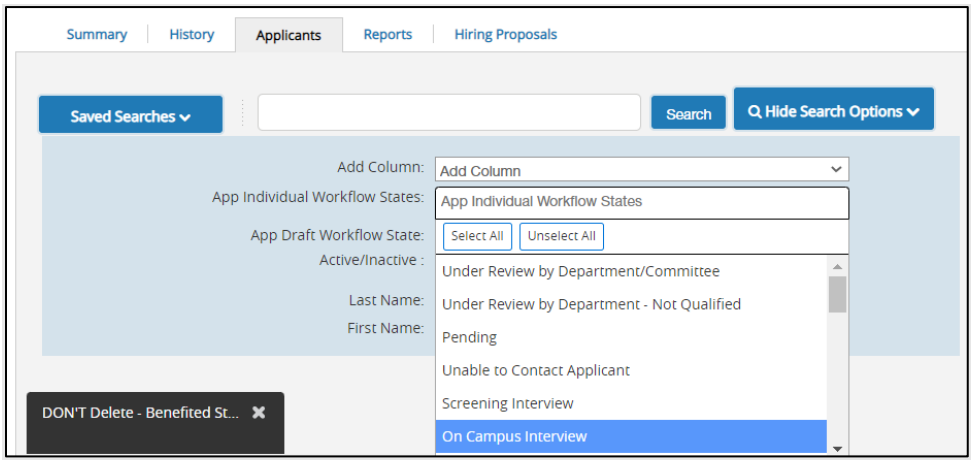
Note: For every applicant interviewed and not selected, you need to provide a reason for not selecting them.

While you are moving all applicants through the workflow, your actions in the system are documented so reports can be run from the system. Therefor you will not need to complete an Applicant Flow Record.

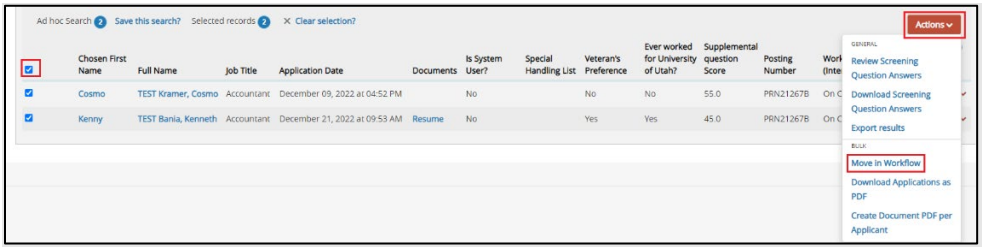
- You can move applicants through the workflow in a batch. To do so, go to the Applicant Review screen. You will see applicants at various Workflow States. Click on the blue **More Search Options** button next to the Search field.



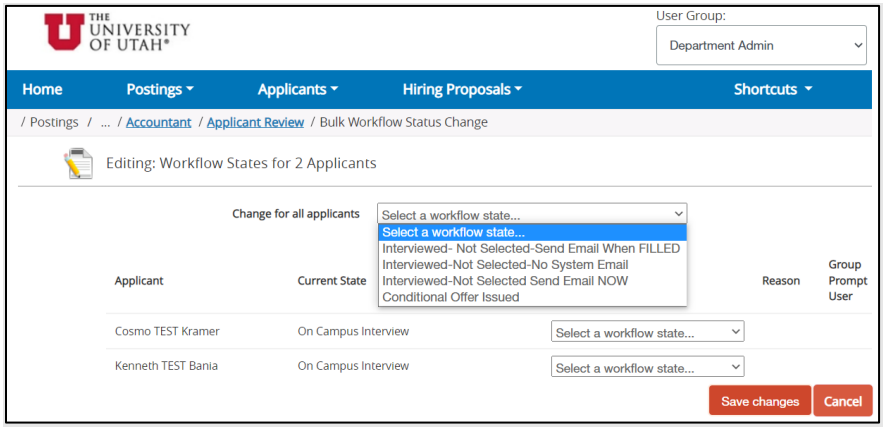
- Now you can search based on “Applicant Workflow State”. For example, click on “On Campus Interview” then hit the blue “Search” button. You will now only see applicants in that Workflow State.



- Next, look above the list of applicant names and you will notice a checkbox in the header column. Check that box. That will select all names. Next, go to the orange **Actions** button on the right-hand side and hover over it. You will see a header in black called **Bulk**. Under that, select the option called **Move in Workflow**.



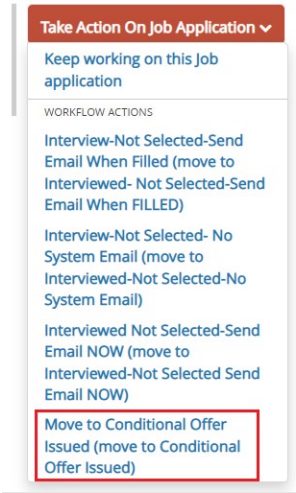
- You will now see an "Editing Page" with a list of all the applicants in the Workflow State you selected. There is a field called **Change for all applicants** with a drop-down menu. Select the option you want then click the orange **Save changes** button on the lower right. This action will change the Workflow State for all selected applicants.



Step #4: CONDITIONAL OFFER & COLLECT ADDITIONAL INFORMATION

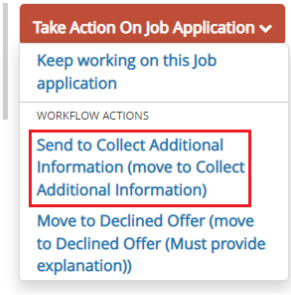
Owner: Dept Admin, and HR

Once the application review process has been completed and you have identified which candidate you would like to proceed with, use the orange **Take Action On Job Application** and select **Move to Conditional Offer Issued** and click **Submit**.



- At this point you will contact the candidate and extend a conditional offer to them for the position.
    - The offer will be conditional based on their successful completion of certain pre-employment screenings (e.g., background check, drug screening, education verification).

- Once the candidate accepts the conditional offer, use the orange **Take Action On Job Application** button and select **Send to Collect Additional Information** and click **Submit**.
    - Selecting this action will trigger an email to be sent to the candidate which will instruct them to go back into their application and provide additional information (e.g., Date of Birth, Social Security Number, etc.) which will be used to complete the required pre-employment screenings.



NOTE: *The candidate must be provided with and accept a conditional offer before we request them to provide us with the sensitive, personal information we request to complete their pre-employment screenings.*

    - The specific instructions that the candidate receives in the email are as follows:
        - Link: https://utah.peopleadmin.com/login
        - Navigate to *Your Applications*
        - Locate your completed application for this posting that will have a status of *Collect Additional Information*.
        - Click UPDATE and complete all fields.
        - You will then be asked to recertify and submit your application

NOTE: *Refer to Appendix D to review screenshots from an applicant's point of view.*

- When the applicant has updated and submitted their application, you will receive an email informing you that the information has been received. You will notice that the Workflow State for the applicant has also been updated to **Additional Information Received**.

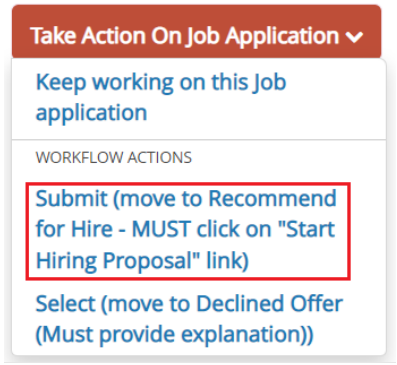
Step #5: CREATING HIRING PROPOSAL & OFFER LETTER

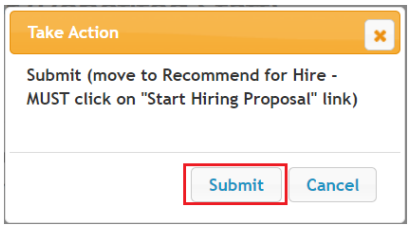
Owner: Dept Admin, and HR

Once you have received the additional information from the candidate you would like to hire, it is time to create the hiring proposal.

> ***NOTE:*** *Hiring Proposals are the way that your system tracks information on everyone who becomes employed through the system. This is vital for system reporting and can be used to load data with a variety of third-party software programs.*

- To begin the Hiring Proposal, open the Job Application of the candidate you wish to hire.
  - Use the **Take Action On Job Application** button on the right-hand side to select **Submit (move to Recommend for Hire – MUST click on "Start Hiring Proposal" link)**. Then click **Submit**.



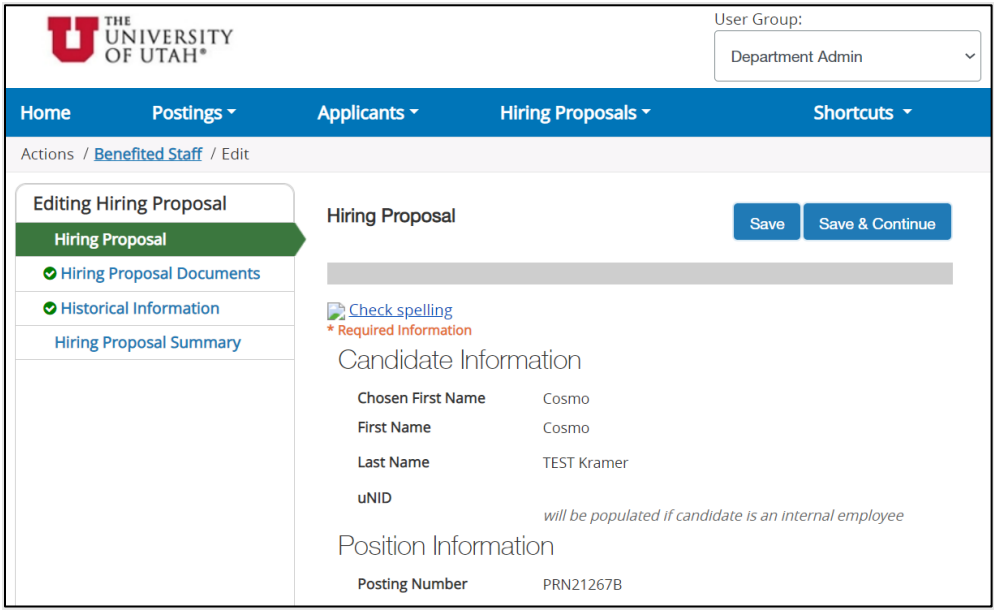


  - Next, notice that a new link titled **Start Hiring Proposal** has appeared underneath the orange **Take Action On Job Application** button. Click on the **Start Hiring Proposal** Link.

- You will be taken to a new screen titled **Starting Hiring Proposal**. Select the blue **Start Hiring Proposal** button to proceed.

NOTE: *If your candidate happens to have another active Hiring Proposal in progress for another position, you will see a message stating "Warning: This Applicant already has a Hiring Proposal in progress." If you see this message, contact HR as you will be unable to start a new hiring proposal on your own.*

- You are now on the **Editing Hiring Proposal** page.

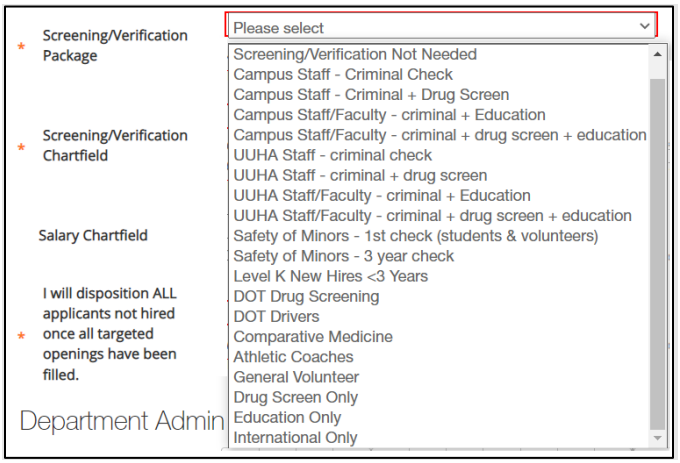


➢ You may now scroll down and edit the information on the **Hiring Proposal** screen.

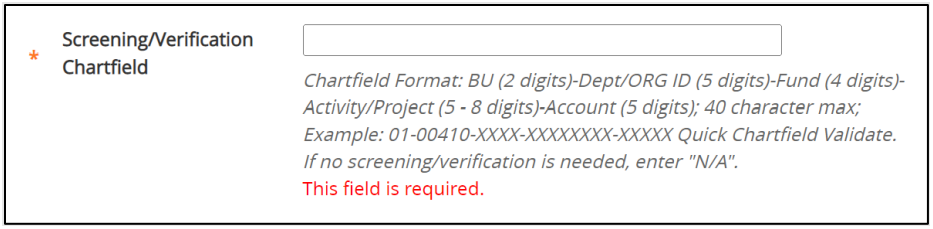
- In the **Hiring Proposal**, under **Department Hiring Information**, enter information in the following fields:
  - Conditional Offer Acknowledgement
  - Conditional Offer Issued Date
  - Conditional Offer Accepted Date
  - Start State
  - Salary Offered

- Salary Acknowledgement
- Transferring from Current UofU Position
- Lateral Transfer
- License/Certification Required for this Position
- Education Verification Acknowledgement
- ***Screening/Verification Requestor***
- ***Screening/Verification Package*** *<----- discussed in detail below*
- ***Screening/Verification Chartfield***
- Salary Chartfield
- I will disposition applicants not hired once all targeted openings have been filled

- ***Screening/Verification Steps***
  - From the Hiring Proposal, you can select the appropriate screening/verification package for your applicant (if applicable). The information entered in these fields will be sent in an integration to the vendor who manages our screenings and verifications and will be used to order the appropriate screening/verification package.
    - ***Screening/Verification Requestor***
      - This field should contain the uNID and the name of the individual placing the order. For example, if your uNID was "u0123456" and your name was "Test User", you would enter "u0123456 Test User" in the field.
    - ***Screening/Verification Package***
      - This field allows you to select the appropriate package for the screening/verification process.



    - ***Screening/Verification Chartfield***
      - The chartfield information for the department/organization which will be billed for the screening/verification should be entered here. If "Screening/Verification Not Needed" was selected, "N/A" may be entered in this field.



NOTE: *The Screening/Verification package will not be ordered at this time but, instead, will be ordered after the Hiring Proposal has been moved to the HR Pre-Hire Checks where an HR Representative will review the information and indicate that the package is ready to be ordered. Specifically, the following must be true for the screening/verification information to be sent to the vendor:*

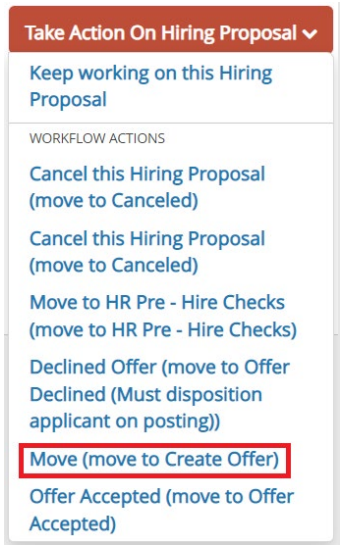
(1) Information must be entered in the Screening/Verification Requestor, Screening/Verification Package, and Screening/Verification Chartfield fields.
(2) The Hiring Proposal must be in the HR-Pre Hire Checks state.
(3) An HR Representative must select "Yes" on a field called "Send Screening/Verification Request Now".

The Screening/Verification package will then be placed in a queue and set to be delivered to the vendor. Files are delivered 3 times per day: 8:00am, 3:00pm, 9:00pm – all times are Mountain Time.

- **Hiring Proposal Documents**
  - Attach documents required for position

➢ Once you have completed filling out and reviewing the Hiring Proposal, you will proceed with receiving any necessary approval to extend the official Offer to the candidate.

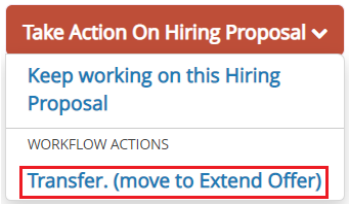
- Under the orange **Take Action On Hiring Proposal** button, select **Move (move to Create Offer)** and click **Submit**.



NOTE: *PeopleAdmin has the capability of allowing you to create and extend electronic offer letters. This feature is currently not fully functional but will be at a later date.*

- Next, use the orange **Take Action On Hiring Proposal** button and select **Transfer (move to Review Offer)** and click **Submit**.
    - When the Hiring Proposal and Offer are in this step, this information may be reviewed by members of the position's search committee.

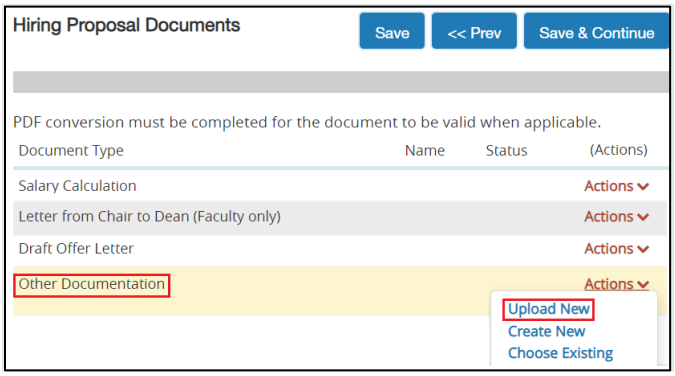
- When your review has been completed, use the orange **Take Action On Hiring Proposal** button and select **Transfer (move to Extend Offer)** and click **Submit**.
    - Then, send the offer letter to your candidate. Eventually, you will have the ability to send offers to candidates directly from PeopleAdmin.



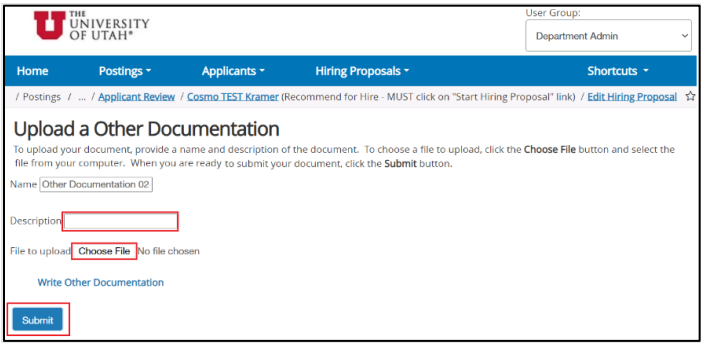
- Once the applicant has accepted the Offer, use the orange **Take Action On Hiring Proposal** button and select **Offer accepted (move to Offer Accepted)** and click **Submit**.

- Now, access applicant's Hiring Proposal to upload the signed Offer Letter.
    - From the Hiring Proposal, scroll down and click on the blue **Pencil** icon next to the **Hiring Proposal Documents** section.

- Next, use the orange **Actions** drop-down menu next to **Other Documentation** and select **Upload New**.

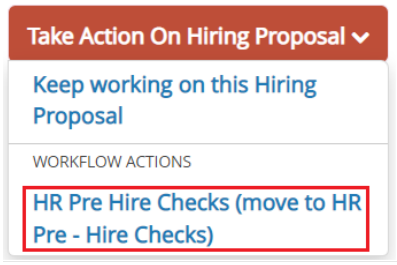


- Click the **Choose File** button, locate and select the offer letter you have saved to your computer then click **Open** to attach the document. Next Then add a **Description** (e.g., "Signed Offer Letter") and click **Submit**.



NOTE: *You may notice that this page is labeled "Upload a Other Documentation". PeopleAdmin has informed us that "Upload a" is hardcoded in their system. We have requested that they remove the "a".*

- Click **Save & Continue** to return to the **Hiring Proposal Summary**.
- Next, use the orange **Take Action On Hiring Proposal** button and select **HR Pre Hire Checks (move to HR Pre – Hire Checks)** and click **Submit**.



Step #6: PRE-HIRE CHECKS AND HIRE

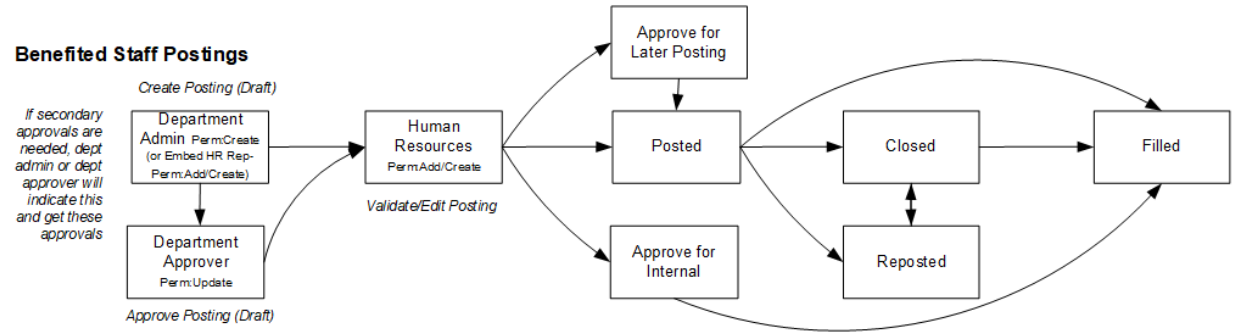
Owner: Dept Admin, and HR

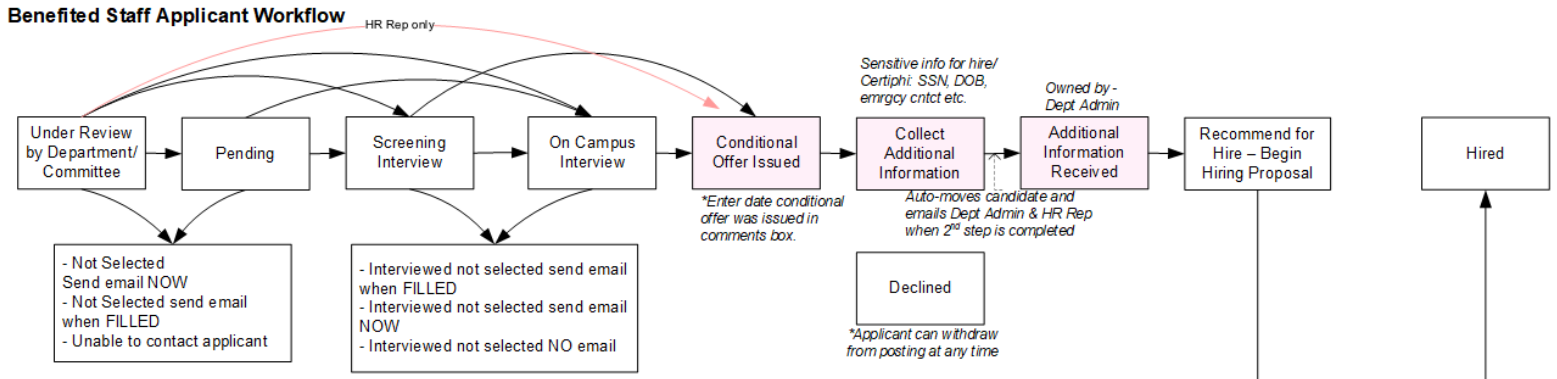
- Now you are ready to initiate any pre–hire screenings required for the position – Criminal Background Check (CBC), Drug Screening, Education Verification, and Reference checks.
- HR will receive the results of the CBC and Drug Screening then move the application to **READY FOR ePAF (move to Ready for ePAF)**.
- You will receive an email notification when the candidate is cleared for hire.
- From the time the HR Rep moves your successful candidate to **READY FOR ePAF (move to Ready for ePAF)**, it will take up to an hour for the applicant's data to be fed from PeopleAdmin to PeopleSoft; the file is set to be sent from PeopleAdmin at the top of each hour.
- Once the candidate's data is in PeopleSoft, initiate the Hire ePAF and begin the I-9 process. Feel free to contact HR for assistance.

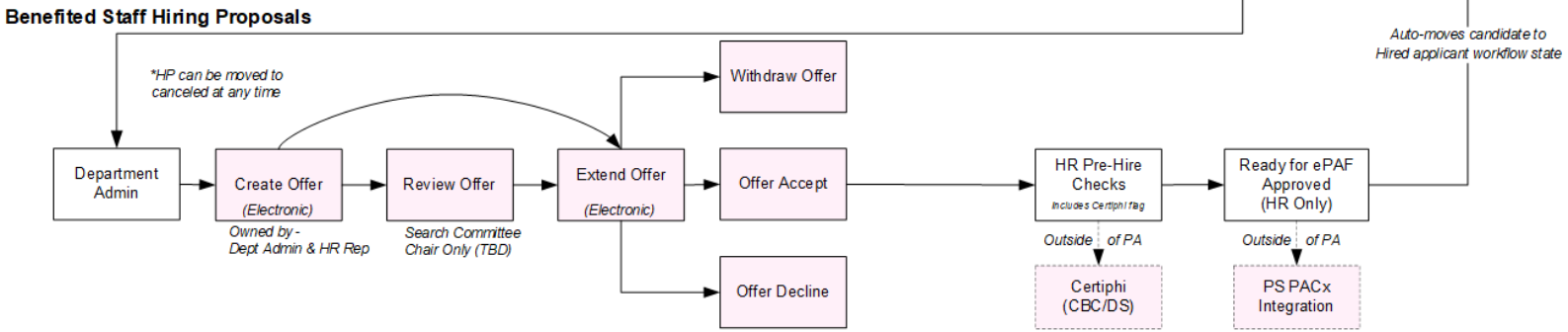
Congratulations! You have just hired a new employee!

If you have questions, please contact your HR Representative / PeopleAdmin subject matter expert.

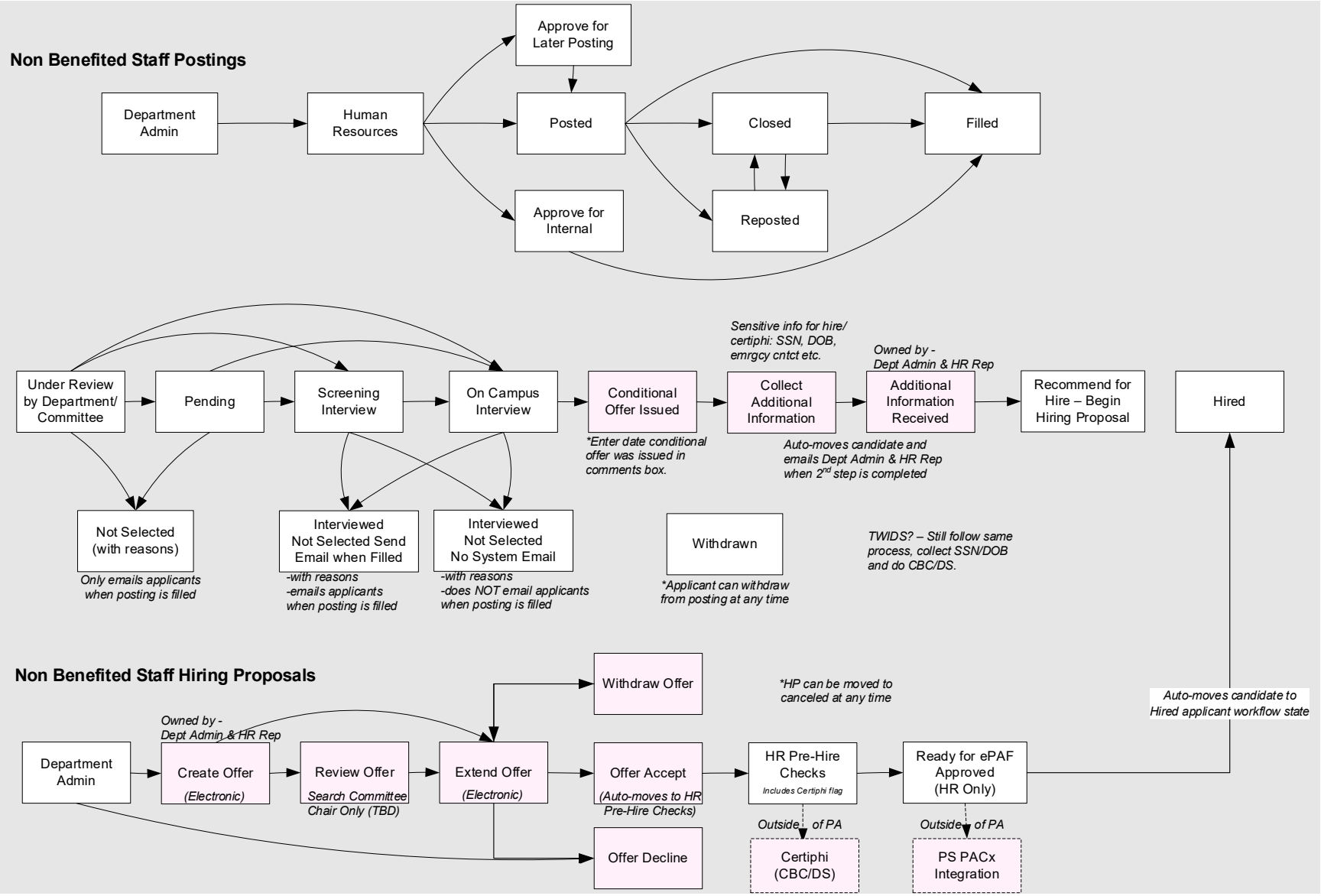
Appendix A: Benefited Staff Workflow







Appendix B: Non-Benefited Staff Workflow



Appendix C: Applicant View – Account Creation & Initial Application

APPLICANT ACCOUNTS VS. APPLICATIONS

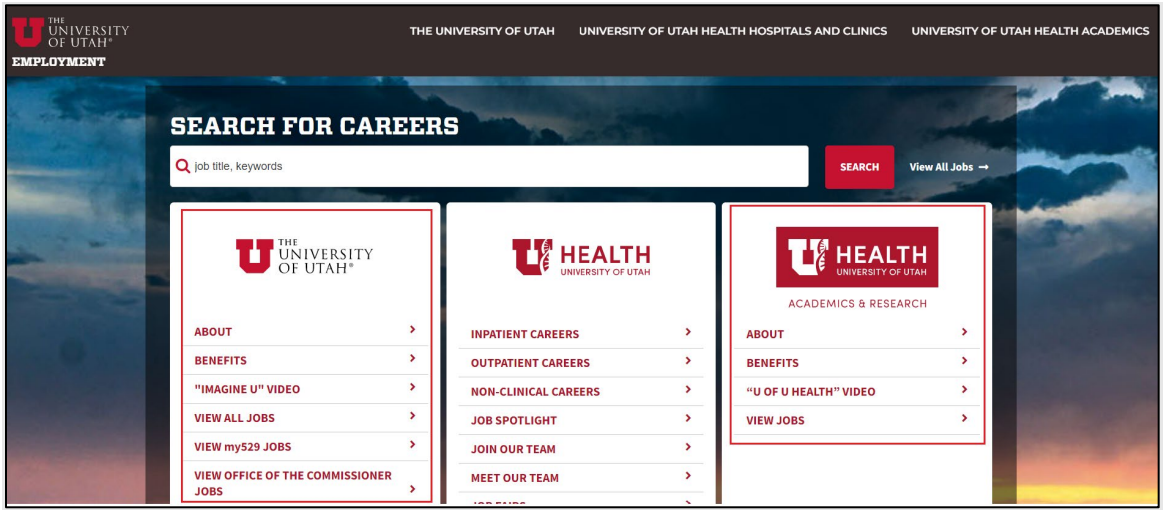
If an applicant updates their account information, the most recent contact data will be available to hiring authorities within your organization. Applicants still must fill out applications to apply to a particular position and the system will keep track of their most up-to-date information used on each application type and pre-populate new application forms with this information each time they apply to a position. The pre-population of data should help reduce your workload as you should not need to update contact information for applicants on each of their applications.

Applicants will be able to do the following:

- Bookmark jobs they are interested in.
- Email a job posting to a friend.
- Upload and manage documents (e.g., resumes, cover letters, etc.) without going through the application process.
- Update their Account Settings (Login and Contact Information).
- Enter Voluntary Demographic information without going through the application process.

You may refer to the steps below to walk an applicant through the application process:

- Most applicants will find University jobs at http://www.employment.utah.edu.

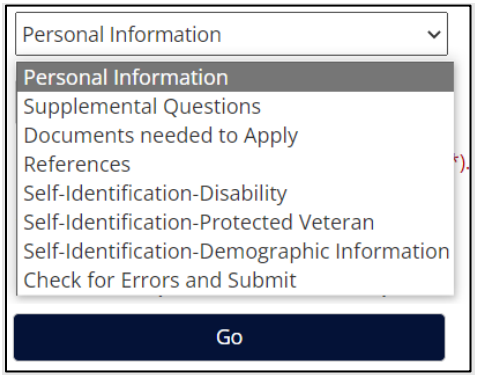


  - The columns for The University of Utah and UHealth Academics point to jobs which are posted in PeopleAdmin.
  - The column for UHealth points to jobs that are posted on a separate Applicant Tracking System maintained by the University's Hospital team. This document does not pertain to these jobs.
- The applicant may use the search bar or other buttons to filter the results of the jobs down to those they are most interested in applying to.

- Once the applicant finds a job they wish to apply for, they will be taken to a screen which will prompt them to create an applicant account in PeopleAdmin.

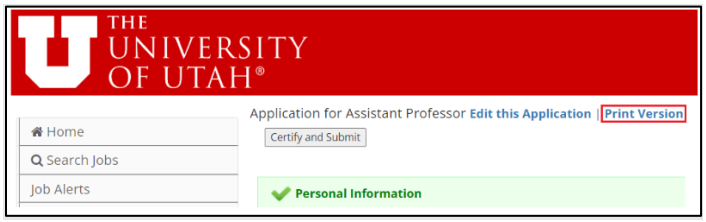
Note: *Internal University employees will use the* ***Current Employee Log In*** *button.*

  - Once you have created your account and/or logged into the system, you may begin filling out your application. Fill in all the required information on every page. You may add multiple entries in certain areas (e.g., education, experience, etc.) of the application.
  - The **Save Changes** button shaves your work and keeps you on the current page. The **Save & Continue** button saves your work and moves you to the next page in the application.
  - On the left-hand side, both top and bottom, there is a drop-down menu. This menu allows you to go to different sections of the application. Select the section you want then click **Go.**

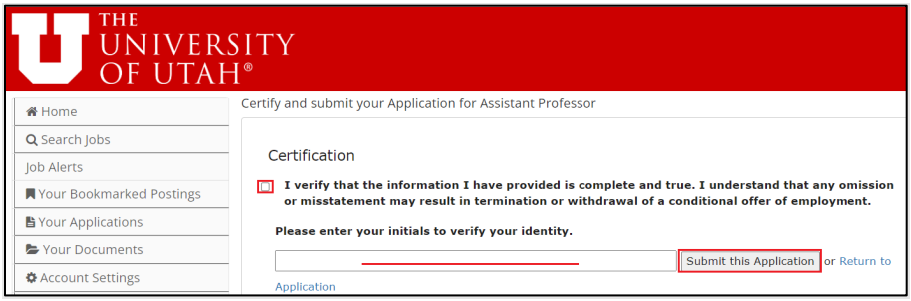


  - Attach documents as needed while applying for the position.
    - You may upload a document
    - You may write a document
    - You may select a previously added document.
  - Before submitting the application, go to the drop-down menu on the bottom left-hand corner and select **Check for Errors** and hit **Go**.
    - Verify your information is correct either by scrolling down, through the page or clicking the blue **Print Version** link which will open a new window for you to

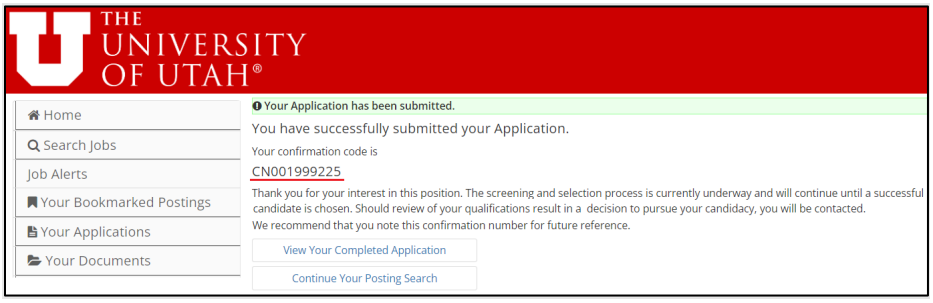
review the data in a printer friendly format. If using the **Print Version**, you may simply close out of the new window to return to the main page.



- Click the **Certify and Submit** button.
- Certify your application by reading the Certification paragraph, checking the **"I verify…"** box, entering your initials, and clicking **Submit this Application**.



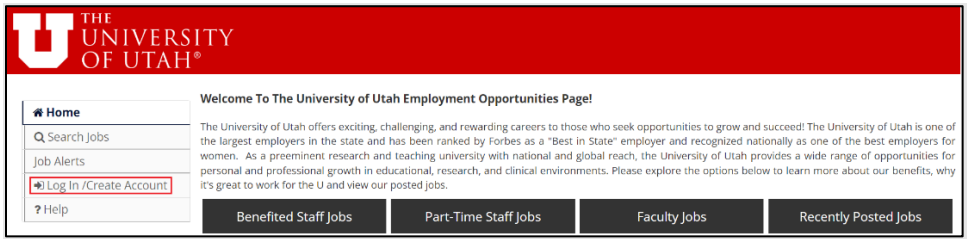
- Note your confirmation number and any messages that may appear.



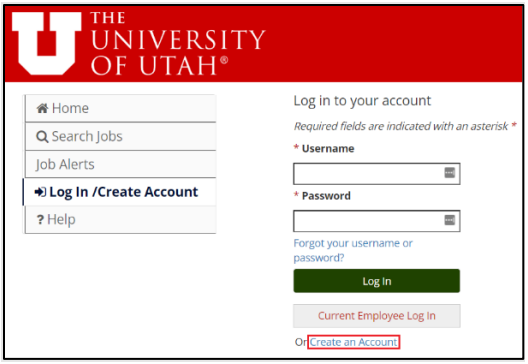
➢ You may now find the application you just completed by clicking on the **Your Applications** link in the left menu.
- View your completed application.
- View any documents you attached while applying for the job.

To create an account and profile directly in PeopleAdmin

- Go to the Applicant Site: https://utah.peopleadmin.com
- Create a new applicant account by selecting **Log In/Create Account** on the left menu

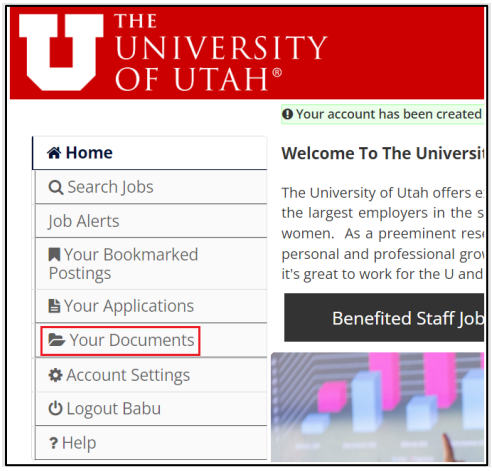


- Click on the blue **Create an Account** link toward the bottom of the page

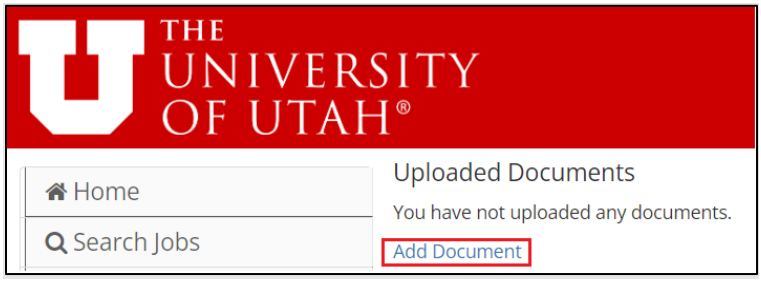


- Enter requested information on **Create an Account** page then click the green **Create account** button at bottom of the page.

- To add documents (e.g., resumes, cover letters, etc.) prior to completing an application, click on the **Your Documents** link in the left-hand menu.

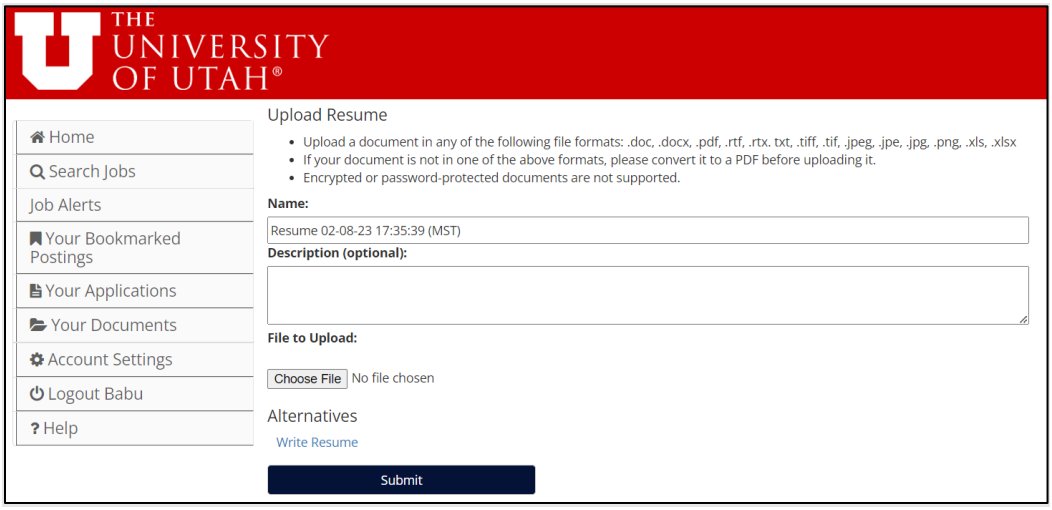


- Next click the blue **Add Document** link

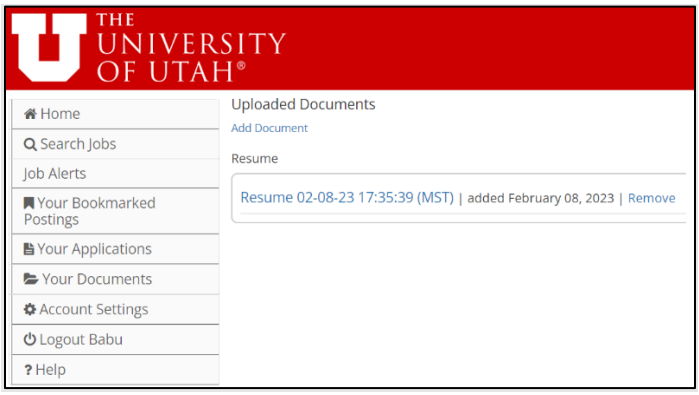


- Select the type of document to add (scroll down the page to see all document options):

- Follow the on-screen instructions to upload your document.



- View the document once it has been uploaded by selecting the **Your Documents** link. Add additional documents as needed.

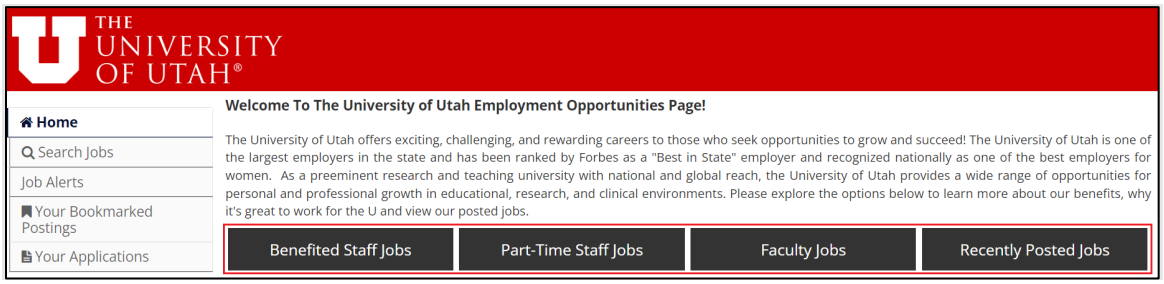


- Click the **Home** link toward the upper left-hand corner of the screen to return to the main applicant page.

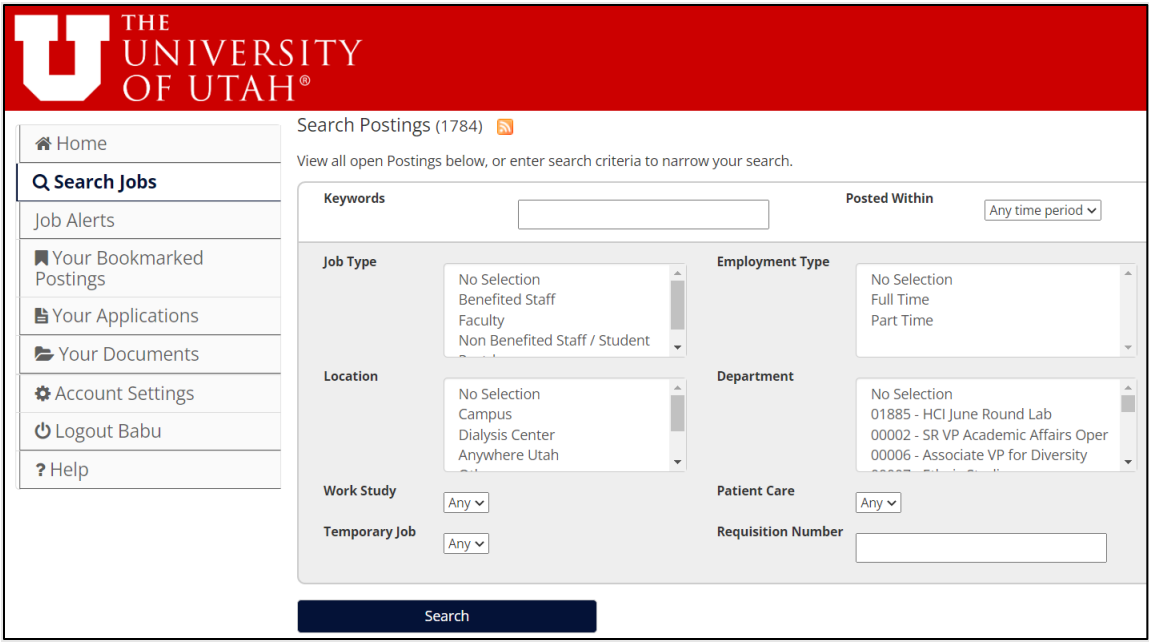
Searching for Jobs within PeopleAdmin

Most candidate will use https://employment.utah.edu to search for jobs. However, individuals may also search for jobs directly within PeopleAdmin.

- Search options on the main page:
  - To search for jobs directly in PeopleAdmin, select the button of the position type that is of interest.



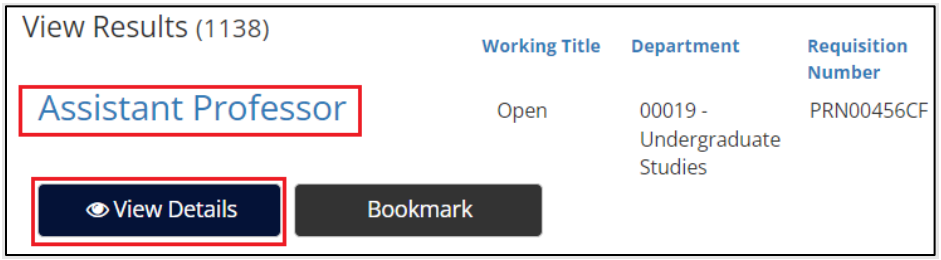
- More search options:
  - To view more Job Search filters, click the **Search Jobs** link toward the top left-hand corner of the screen.



- Use the keyword search to narrow down your search results and/or
- Use one or more of the other search criteria filters to narrow your search results.

➢ Apply to a Job

- When you have found a job, you wish to apply to, click either the name of the position or the **View Details** button.

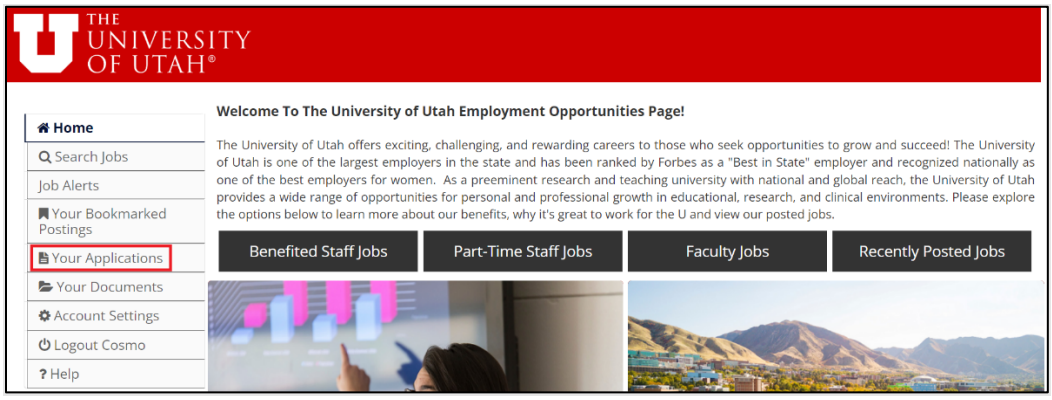


- Click **Apply for this Job** button on the right.
- To view step-by-step instructions on how to complete an application, click *here*.

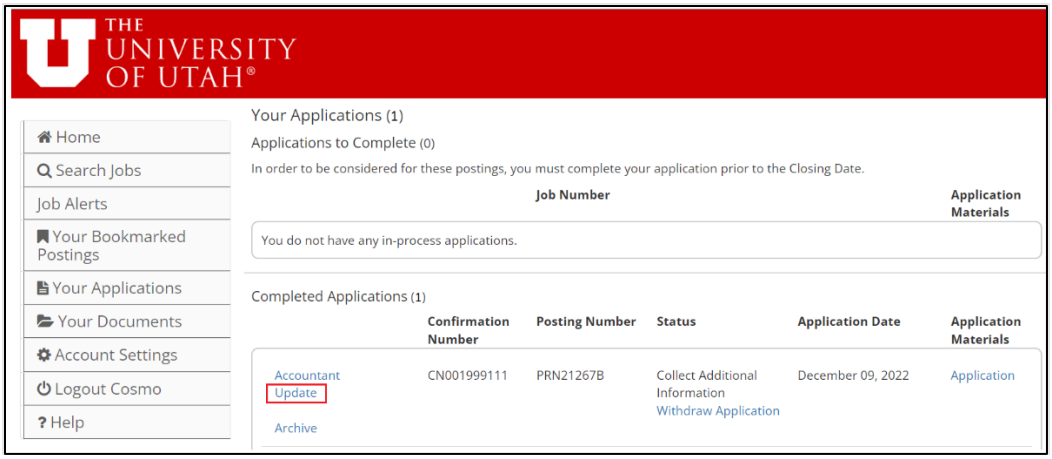
Appendix D: Applicant View – 2nd Step Application

For your reference, here are some screenshots depicting what your applicant will see when then login to their People Admin Account:

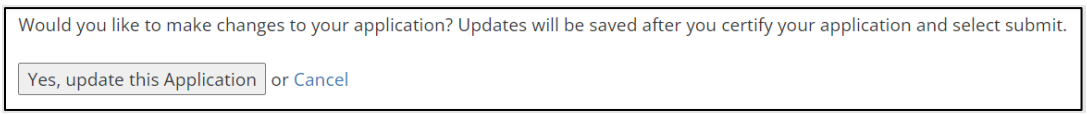
- From the Applicant's Homepage, they will select **Your Applications**



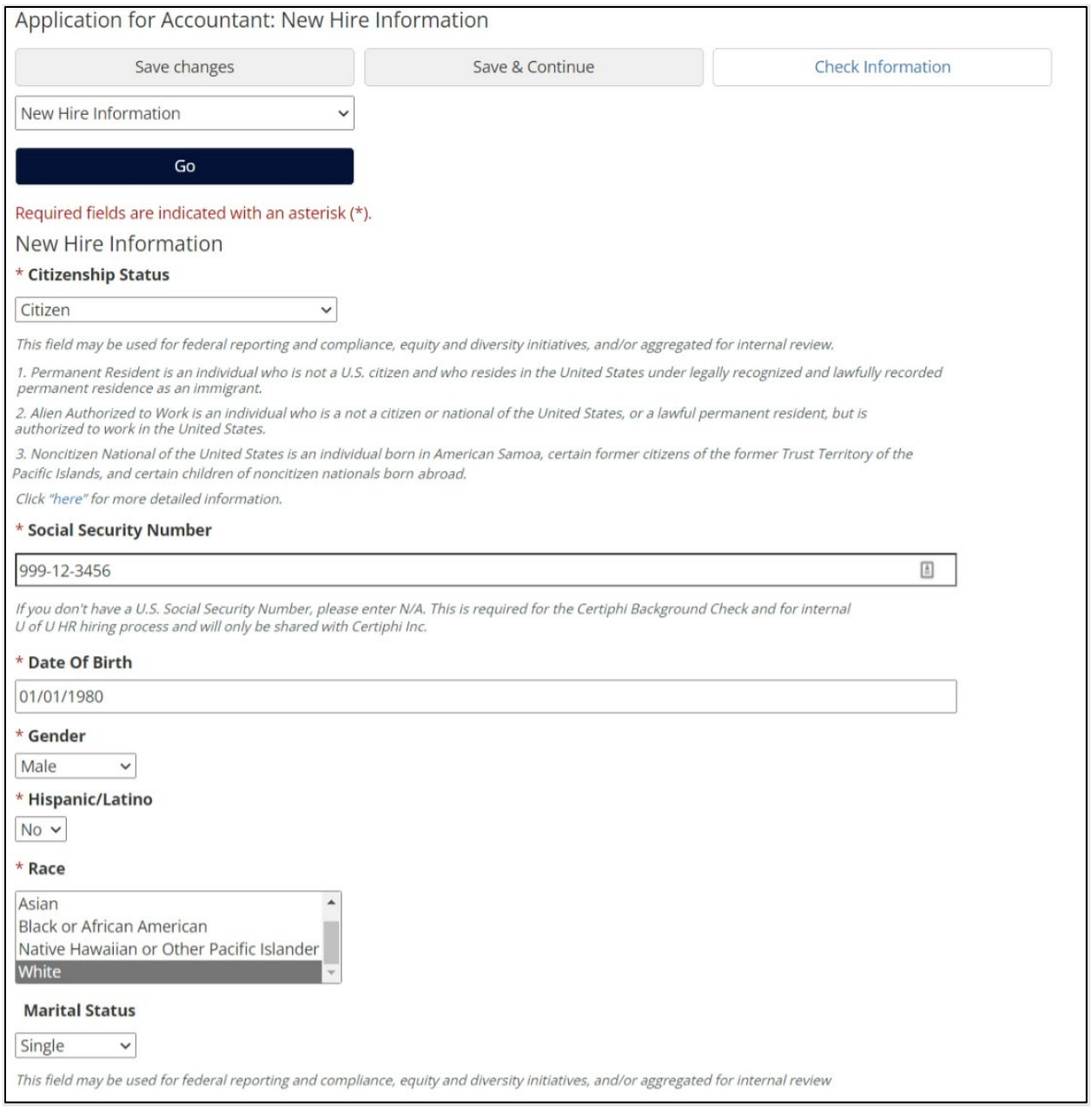
- From the **Your Applications** page, they will select **Update**

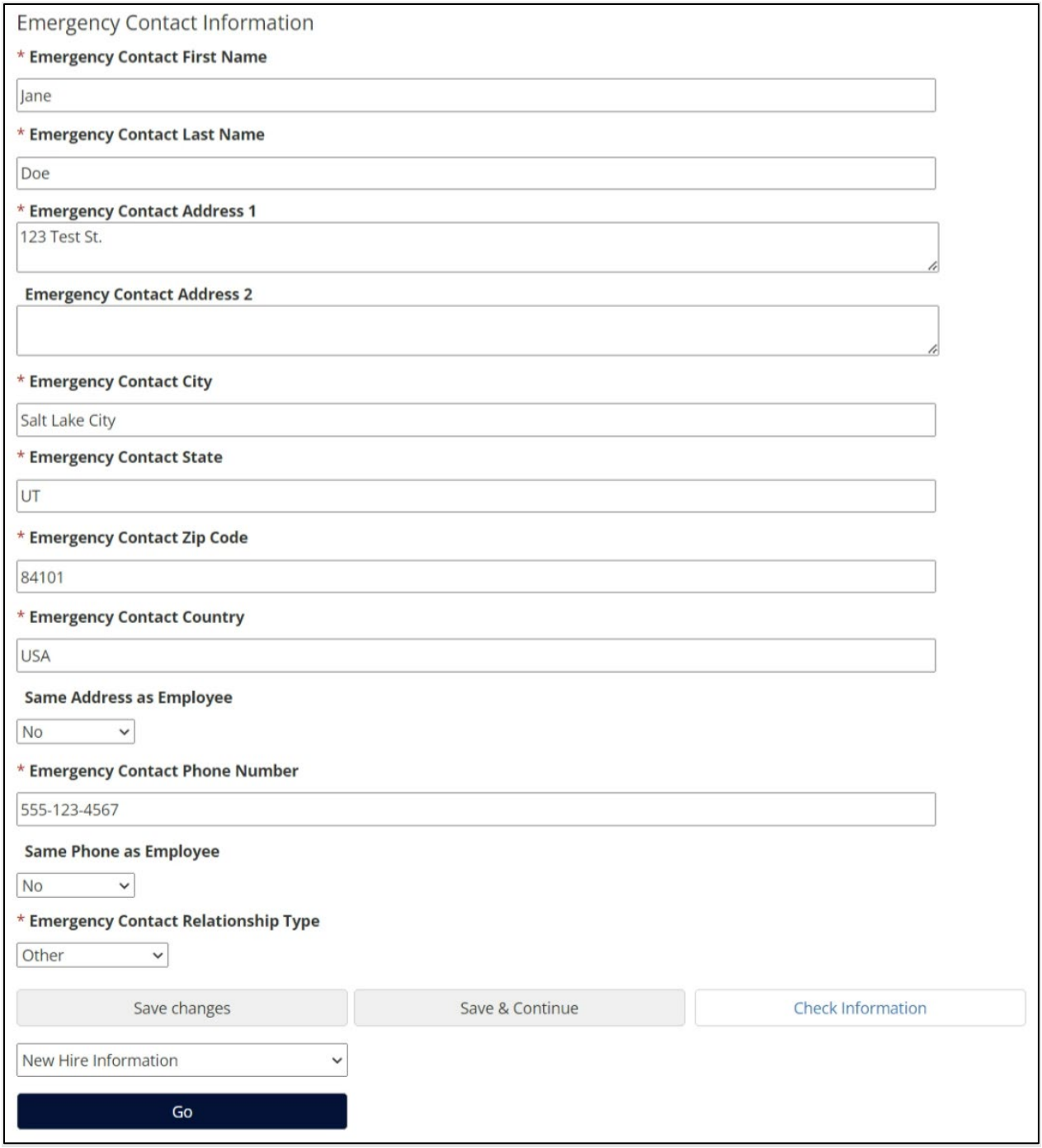


  - Applicants will be asked to certify that they are making changes to their application. They will need to click **Yes, update this Application** to proceed:



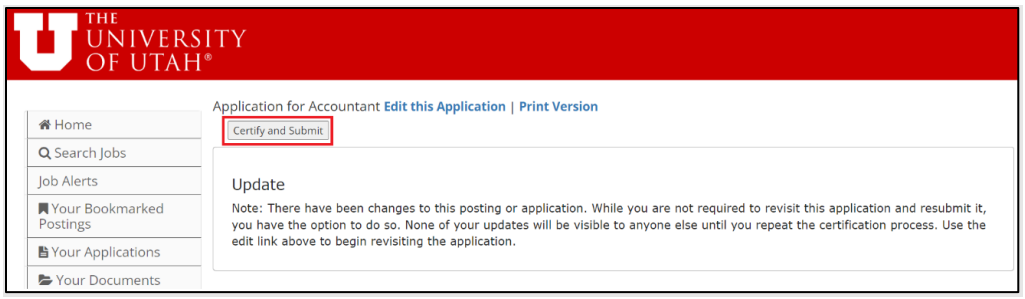
  - Applicants will now be asked to provide certain pieces of personal information (Citizenship Status, Social Security Number, Date Of Birth, etc.). Applicants must provide information marked as required to proceed. One all the required information has been provided; the applicant will need to select **Save & Continue** at the bottom of the screen.

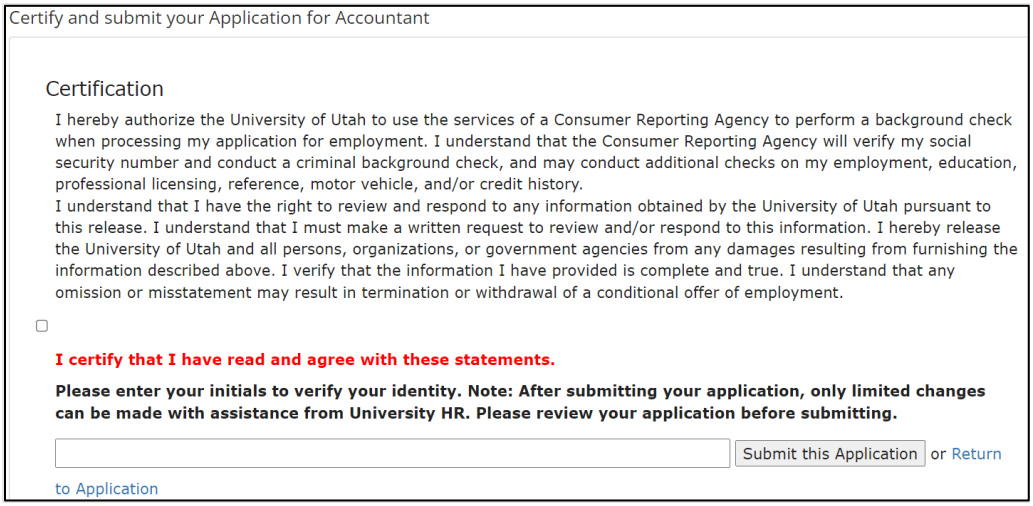

Application for Accountant: New Hire Information
Save changes
Save & Continue
Check Information
New Hire Information
Go
Required fields are indicated with an asterisk (*).
New Hire Information
* Citizenship Status
Citizen
This field may be used for federal reporting and compliance, equity and diversity initiatives, and/or aggregated for internal review.
1. Permanent Resident is an individual who is not a U.S. citizen and who resides in the United States under legally recognized and lawfully recorded permanent residence as an immigrant.
2. Alien Authorized to Work is an individual who is a not a citizen or national of the United States, or a lawful permanent resident, but is authorized to work in the United States.
3. Noncitizen National of the United States is an individual born in American Samoa, certain former citizens of the former Trust Territory of the Pacific Islands, and certain children of noncitizen nationals born abroad.
Click "here" for more detailed information.
* Social Security Number
999-12-3456
If you don't have a U.S. Social Security Number, please enter N/A. This is required for the Certiphi Background Check and for internal U of U HR hiring process and will only be shared with Certiphi Inc.
* Date Of Birth
01/01/1980
* Gender
Male
* Hispanic/Latino
No
* Race
Asian
Black or African American
Native Hawaiian or Other Pacific Islander
White
Marital Status
Single
This field may be used for federal reporting and compliance, equity and diversity initiatives, and/or aggregated for internal review



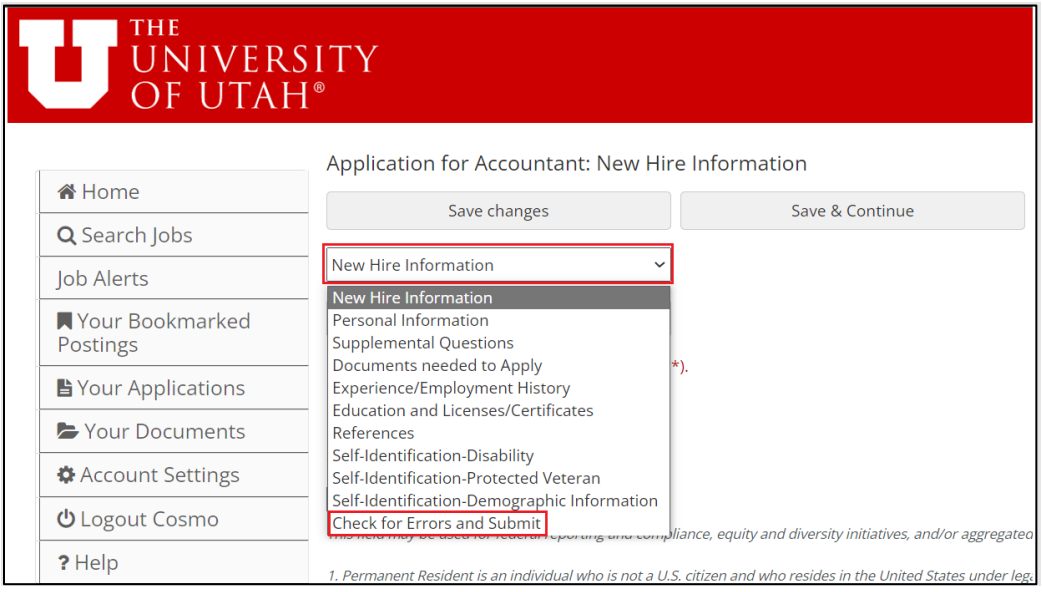
NOTE: *Some applicants may not have Social Security Numbers at the time they are providing this information on their application. These applicants will be instructed to enter "N/A" in the Social Security Number field.*

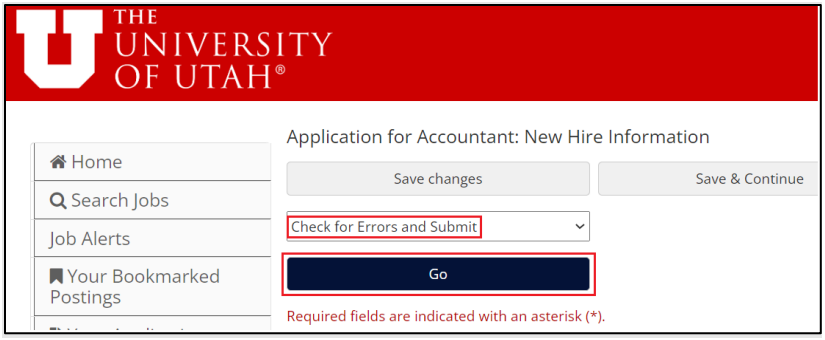
- The applicants will now review—but not edit—all the information they provided during their initial application by clicking on **Save & Continue** on each page until they are brought to a page where they will be asked to **Certify and Submit** their information**.**





- The applicant also has the option of simply filling out the new information requested of them and then, from the dropdown menu that says **New Hire Information** selecting **Check for Errors and Submit** then clicking the blue **Go** button. This method will take the applicant directly to the **Certify and Submit** page.




THE UNIVERSITY OF UTAH®
Home
Search Jobs
Job Alerts
Your Bookmarked Postings
Application for Accountant: New Hire Information
Save changes
Save & Continue
Check for Errors and Submit
Go
Required fields are indicated with an asterisk (*).

Appendix E: System Generated Emails

Applicant/Application Emails

Reference Request Emails

Name:	Reference Request
Type:	Reference Request
From address:	Employment@noreply.utah.edu
CC:	
BCC:	
Subject:	Reference Request from the University of Utah

{{reference_request__name}},
{{application__first_name}} {{application__last_name}} has been nominated for the position of {{posting__job_title}} in the Department of {{posting__organizational_unit}} at the University of Utah and has given the search committee permission to request letters of reference. We would greatly appreciate your candid appraisal, since this will be invaluable to the search committee in completing a thorough evaluation of the candidate's suitability for the position.
For a more detailed description of the position you may also view the position announcement online at: {{posting__applicant_site_quick_link_url}}
Please click the link below to upload your recommendation letter. You may attach a PDF or Word file. Please note the University of Utah requires that letters of support be on institutional letterhead and be signed by the reviewer.
{{reference_request__url}}
INSTRUCTIONS:
Please fill in Reference Information fields. At the bottom of the page you will have the option to write your letter of reference directly into the system (but no ability to use letterhead) OR to browse your own files and upload a document (preferred). Please make sure you press the SUBMIT button on the bottom of the page to ensure that your letter is posted to the applicant's file.
With questions regarding the content or deadline for the letter, please contact the {{posting__organizational_unit}} department directly.
Note from department: {{posting__provider_special_instructions}}
If you experience difficulty with the reference request system, please contact the appropriate office below:
For School of Medicine, College of Nursing, College of Pharmacy, College of Health, School of Dentistry or Eccles Health Sciences Library faculty positions, please contact the Office for Faculty and Academic Personnel for University of Utah Health, at 801-581-5705, piikea.godfrey@hsc.utah.edu
For faculty positions in all other academic areas, please contact the Office for Faculty at 801-581-8763, officeforfaculty@utah.edu.
We are aware of the time and effort your response requires and appreciate your help. Your prompt reply would be greatly appreciated.
Yours sincerely,
{{posting__organizational_unit}}
University of Utah
HumanResources

Name:	Reference Confirmation-To Reference Provider
Type:	Reference Request
From address:	Employment@noreply.utah.edu
CC:	
BCC:	
Subject:	Reference Confirmation

{{reference_request__name}},

Thank you for uploading a reference for {{application__first_name}} {{application__last_name}}. This email serves as a notice of receipt for your reference materials to the University of Utah. We will contact you if more information is needed.
Thank you again for participating in the hiring process at the University of Utah.
{{posting__organizational_unit}}
University of Utah
HumanResources

Name:	Reference Provider - To Applicant
Type:	Reference Request
From address:	Employment@noreply.utah.edu
CC:	
BCC:	
Subject:	Reference Received

Dear {{application__first_name}},

This is an email to let you know that a reference letter from {{reference_request__name}} has been received for your application to the {{posting__job_title}} position.

You may check the status of your application at any time at https://utah.peopleadmin.com.

Thank you,
{{posting__organizational_unit}}
The University of Utah

Collect Additional Information (2nd Step Application)

Name:	Applicant - Collect Additional Information
Type:	Application
From address:	Employment@noreply.utah.edu
CC:	
BCC:	
Subject:	Conditional Offer - Action Required

Dear {{user__full_name}},

Additional information is required in order to proceed with the hiring process for the following position:

{{posting__posting_detail__posting_number}}
{{posting__job_detail__working_title}}
{{posting__organizational_unit_id}}

The below information will be shared with our Background Check Vendor, Certiphi, Inc. You can view their Privacy Policy at https://www.certiphi.com/privacy-policy/. You can find more information about the Background Check / Screening process at https://www.hr.utah.edu/forms/lib/Certiphi_Background_Check_Info.pdf.

Please login to your account in our applicant tracking system to provide additional information.
Link: https://utah.peopleadmin.com/login
Navigate to *Your Applications.*
Locate your completed application for this posting that will have a status of *Collect Addtional Information.*
Click UPDATE and complete all fields.
You will then be asked to recertify and submit your application.

Applicants Not Selected / Posting Canceled

Name:	Not Selected (Not Interview) Email to Applicants NOW
Type:	Application
From address:	Employment@noreply.utah.edu
CC:	
BCC:	
Subject:	University of Utah Job Posting

Dear {{user__first_name}},

Thank you for the opportunity to review and evaluate your application materials for the {{posting__job_title}}, {{posting__posting_number}}, position at the University of Utah. We regret to inform you that we will not be moving forward with your application for this position. Please be advised that the hiring process is generally highly competitive and it is not always possible for us to interview all qualified applicants for a position.
We wish you success in your professional pursuits.

Sincerely,
{{posting__organizational_unit}}
University of Utah
HumanResources

Name:	Not Selected (move to Not Interviewed - Send Email when FILLED)
Type:	Application
From address:	Employment@noreply.utah.edu
CC:	
BCC:	
Subject:	University of Utah job posting

Dear {{user__first_name}},
Thank you for the opportunity to review and evaluate your application materials for the {{posting__job_title}}, {{posting__posting_number}}, position at the University of Utah. We regret to inform you that we will not be moving forward with your application for this position and another candidate has been selected. Please be advised that the hiring process is generally highly competitive and it is not always possible for us to interview all qualified applicants for a position.
We wish you success in your professional pursuits.
Sincerely,
{{posting__organizational_unit}}
University of Utah
HumanResources

Name:	Interviewed - Not Selected - Send Email NOW
Type:	Application
From address:	Employment@noreply.utah.edu
CC:	
BCC:	
Subject:	University of Utah job posting

Dear {{user__first_name}},
Thank you for interviewing for the {{posting__job_title}}, {{posting__posting_number}}, position with the {{posting__organizational_unit}} department at the University of Utah. We regret to inform you that we will not be moving forward with your application for this position.
Please note that the hiring process is highly competitive, and that we evaluated a number of qualified and capable individuals. We wish you success in your professional pursuits.
Sincerely,
{{posting__organizational_unit}}
University of Utah
HumanResources

Name:	Interviewed Not Selected Email to Applicants when FILLED
Type:	Application
From address:	Employment@noreply.utah.edu
CC:	
BCC:	
Subject:	Note from the University of Utah

Dear {{user__first_name}},

Thank you for interviewing for the {{posting__job_title}}, {{posting__posting_number}}, position with the {{posting__organizational_unit}} department at the University of Utah. Please be advised that we have completed the interview process, and that we have selected another candidate.

Please note that the hiring process is highly competitive, and that we evaluated a number of qualified and capable individuals. Although you were not selected for this position, we encourage you to consider applying for other positions at the University of Utah.

We wish you success in your professional pursuits.
Sincerely,
{{posting__organizational_unit}}
University of Utah
HumanResources

Name:	Posting Canceled Email to Applicants
Type:	Application
From address:	Employment@noreply.utah.edu
CC:	
BCC:	
Subject:	University of Utah Job Posting Has Been Canceled

Dear {{application__first_name}},

Thank you for applying for {{posting__job_title}}, {{posting__posting_number}}, at the University of Utah. Please be advised that this job posting has been canceled, and therefore recruitment for this position has ended. We wish you success in your professional pursuits.

Sincerely,
{{posting__organizational_unit}}
University of Utah
HumanResources

Search Committee Assignments

Name:	Search Committee Member Assigned
Type:	Posting
From address:	Employment@noreply.utah.edu
CC:	
BCC:	
Subject:	You have been Assigned as a Search Committee Member/Applicant Reviewer

You have been assigned as a Search Committee Member/Applicant Reviewer for the position of {{posting__posting_number}} - {{Posting__job_title}}. You may log in to review candidates at your convenience at **https://utah.peopleadmin.com/hr/shibboleth**
Once you have logged in, remember to check your user role in the dropdown menu located in the top right-hand corner of the screen. When you are in your role as "Search Committee Member," you will be able to view candidate materials and have the ability to rank candidates (if the search chair included evaluative criteria as a part of the search process). If you do not see the postings tab while in your "Search Committee Member" role, please select the refresh button on the right of your drop-down menu.
To locate your posting, select "Postings" at the top of the screen, then select either Faculty, Campus Faculty, Benefited Staff or Non-Benefited Staff depending on the type of position for which you are hiring. After selecting the position title, click on the "Applicants" tab in the middle of the screen to locate the candidate materials. If you participate in interviews, feel free to review some sample interview questions here:
https://www.hr.utah.edu/serviceTeams/sample-interview-questions.php.
For "Faculty" and "Campus Faculty" searches only:
For "Faculty" (Health Sciences) searches: Completion of the Faculty Search Committee training is highly encouraged and available at **https://utah.bridgeapp.com/learner/courses/4430d289/enroll**.
For "Campus Faculty" (Main Campus) searches: Search Committee training is required and must be completed every two years. Online training can be accessed at **https://utah.bridgeapp.com/learner/courses/4430d289/enroll**. In-person training sessions for search committees can be arranged by emailing the Office for Faculty at officeforfaculty@utah.edu.

Should you have any questions about your access to the system, please feel free to contact University Human Resource Management at 801-581-7447. Thank you and good luck with the search.
Human Resources
University of Utah
HumanResources

Name:	Search Committee Chair Assigned
Type:	Posting
From address:	Employment@noreply.utah.edu
CC:	
BCC:	
Subject:	You have been Assigned as a Search Committee Chair

You have been assigned as a Search Committee Chair for the position of {{Posting__job_title}}. You may log in to review candidates at your convenience at **https://utah.peopleadmin.com/hr/shibboleth**
Once you have logged in, remember to check your user role in the dropdown menu located in the top right-hand corner of the screen. When you are in your role as "Search Committee Member," you will be able to view candidate materials and have the ability to rank candidates (if evaluative criteria were included as a part of the search process). You will also have the ability to see the results of search committee members rankings - only the Search Committee Chair has this ability.

To locate your posting, select "Postings" at the top of the screen, then select either Faculty, Benefited Staff or Non-Benefited Staff depending on the type of position for which you are hiring. After selecting the position title, click on the "Applicants" tab in the middle of the screen to locate the candidate materials. For further assistance you may download the **Search Committee Member PeopleAdmin Users guide**. If you participate in interviews, feel free to review some sample interview questions here: **https://www.hr.utah.edu/serviceTeams/sample-interview-questions.php.**
We also strongly recommend that search committee members review the **University of Utah Faculty Search & Recruitment Toolkit**.
Should you have any questions about your access to the system, please feel free to contact Human Resources (staff positions) or Faculty Affairs (faculty positions) for assistance. Thank you and good luck with the search.
Human Resources
University of Utah