PeopleAdmin Version 7.0
Training for Department Customers

PA7 Applicant Tracking

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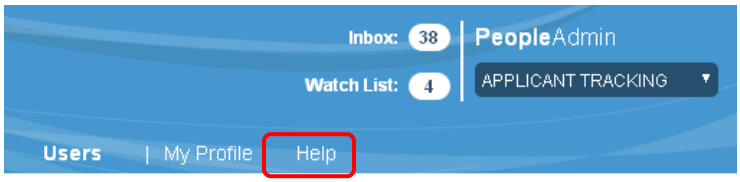
SITE WEB ADDRESS/URL

The Web Address/URL for the training site: https://utah-training.peopleadmin.com/hr/shibboleth
Use your CIS username and password to login. This training environment is available to you as a way to practice without having impact on the live site. You can access the live site through the University Human Resources website: http://www.hr.utah.edu/openposition/.

KEY CONCEPTS

1. SYSTEM HELP

At any point, if you have a question, make sure to reference the help documentation available in the upper right hand corner of your site when you are logged in.



2. POSITION TYPES

Position Types are the core configuration in PeopleAdmin Release 7.0 that allows for different:

- Online job posting forms
- Online application forms
- Workflows

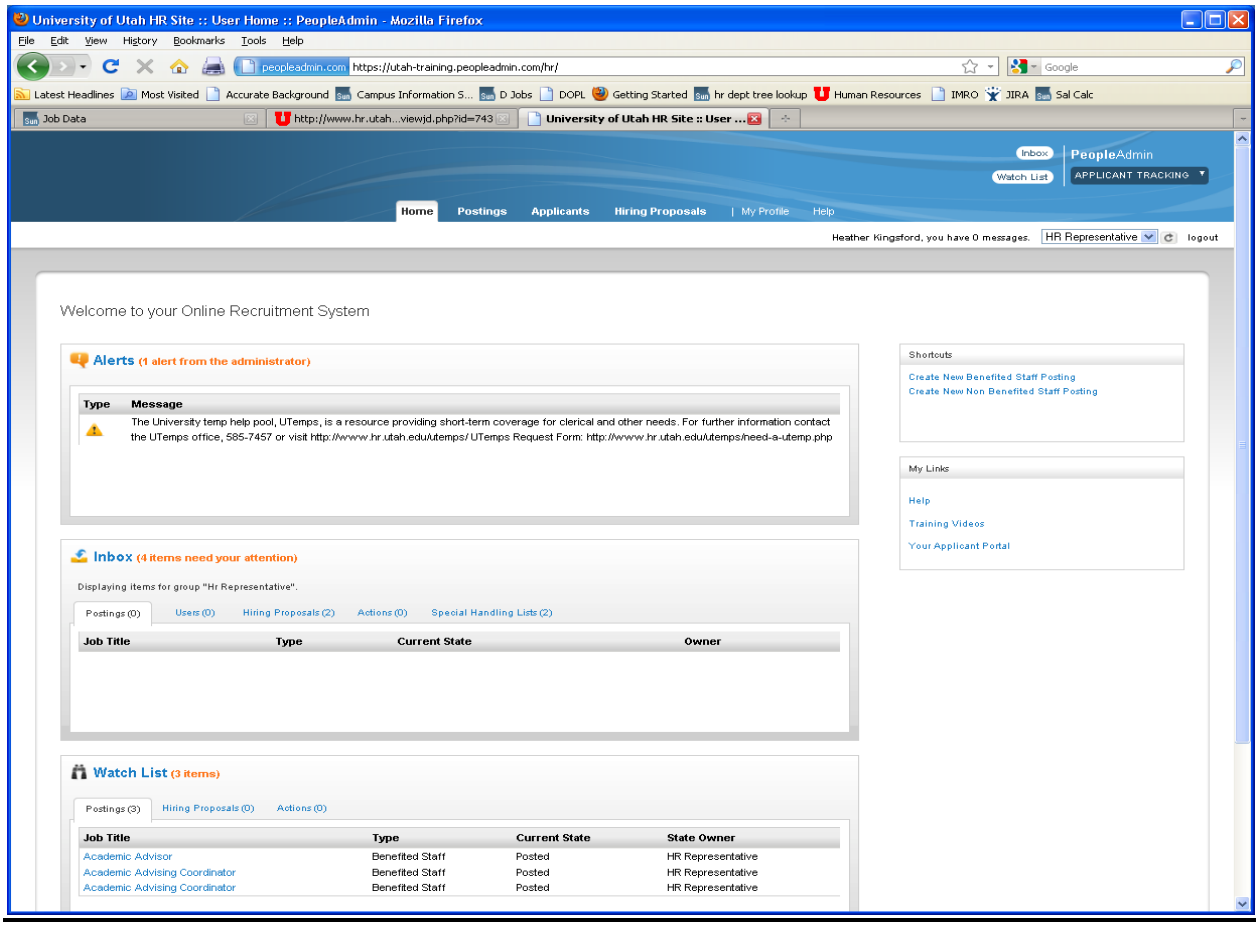
At the University of Utah there are three position types:

- Faculty
- Benefitted Staff
- Non-Benefitted Staff.

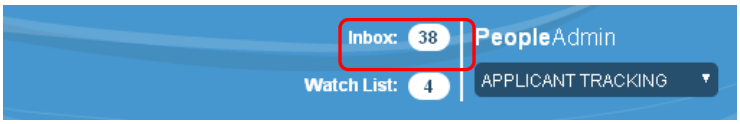
3. USER'S ROLE ASSIGNMENTS

- HR Rep:
    - Access: Departments that they support.
    - Role: Create and process postings, move applicants through workflow, and create and process hiring proposals.
- DFA (Director of Faculty Affairs)
    - Access: View all postings, applicants, and hiring proposals based on VP area (e.g., Health Sciences or Academic Campus)
    - Role: review, approve, create, and transition new postings, applicants, and hiring proposals through workflow
- Department Administrator:
    - Access: They can view jobs in their department(s) (just like ePAF).
    - 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) (just like ePAF).
    - Role: They can create job postings. They can view applications, but not take action on them.
- Dean/Org Head: for Faculty postings only
    - Access: View jobs in their division(s)
    - Role: Approve actions
- Budget Approver: for Faculty postings only
    - Access: View jobs in their VP area
    - Role: Approve actions
- VP Approver: for Faculty postings only
    - Access: View jobs in their VP area
    - Role: Approve actions
- 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 user name will be their employee ID.

GETTING FAMILIAR WITH THE SYSTEM

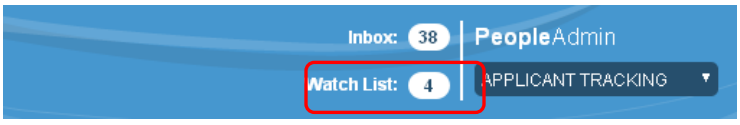


INBOX



This will probably be one of the most useful tools for users in the system. For each individual user, the Inbox will contain all items in the system that require the user's attention, across all user roles they may possess. When in doubt check your inbox.

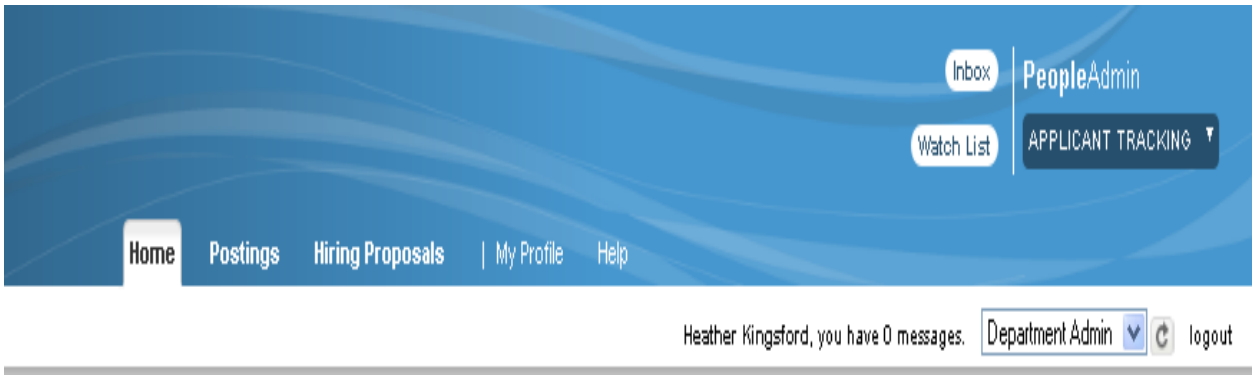
WATCHLIST



You will notice that everywhere you see postings in the site you will have the ability to "Watch" an item by clicking on the binoculars icon.

Navigation bar and your name bar:

The navigation bar is toward the top in blue, and includes "Home," "Postings," and "Hiring Proposals." Your name bar is a white bar right under the navigation bar that includes your name, the phrase "you have * messages" and a logout logo. Every time you take an action in the system, this bar will turn **green** (for "go" if your action was successful) or **red** (for "stop" if there was an error or further action is necessary) with instructions. To remove the green/red bar and reveal the white bar again, click the **black X** on the right.

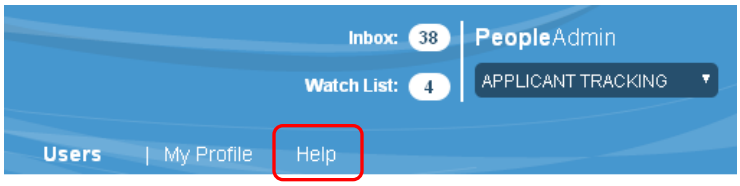


WORKING WITH POSTINGS

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

Note: *At any time during this process click on the* ***Help*** *link in the* ***User Control Box****.*



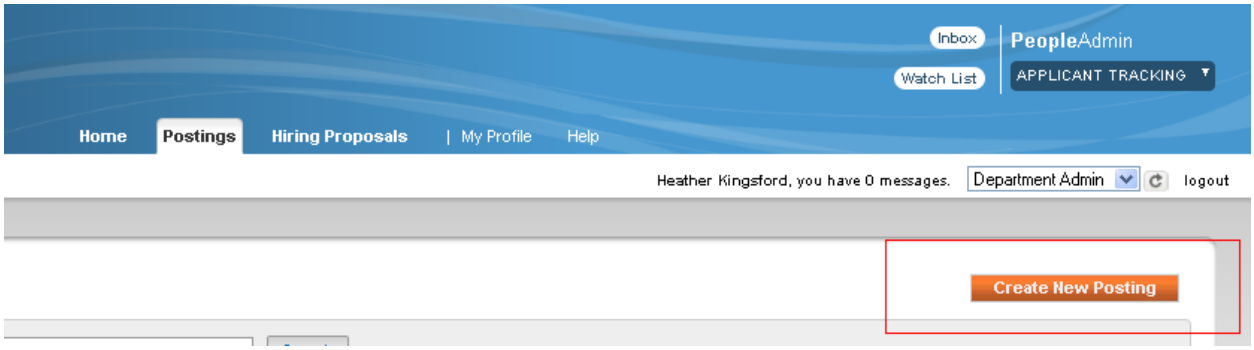
TIP: *When you click on a hyperlink, you may get a message that says "There are unsaved changes on this page. Do you want to leave the page and lose all changes?" If you get this message, click "cancel," scroll to the top or bottom of the page, and click "save" on the right hand side. Then, you will 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.

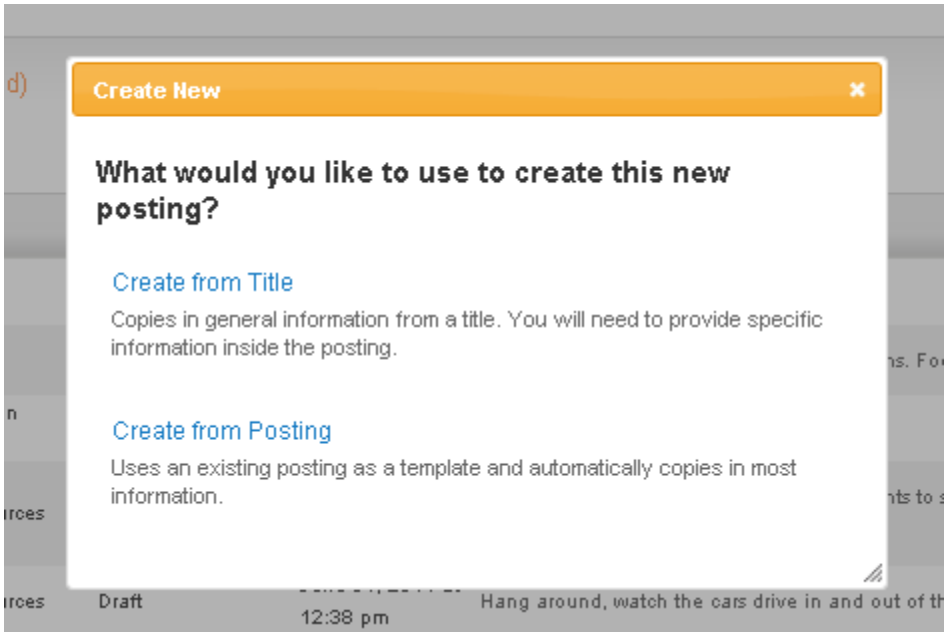
Workflow Step #1a: CREATE A POSTING from a Title

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.



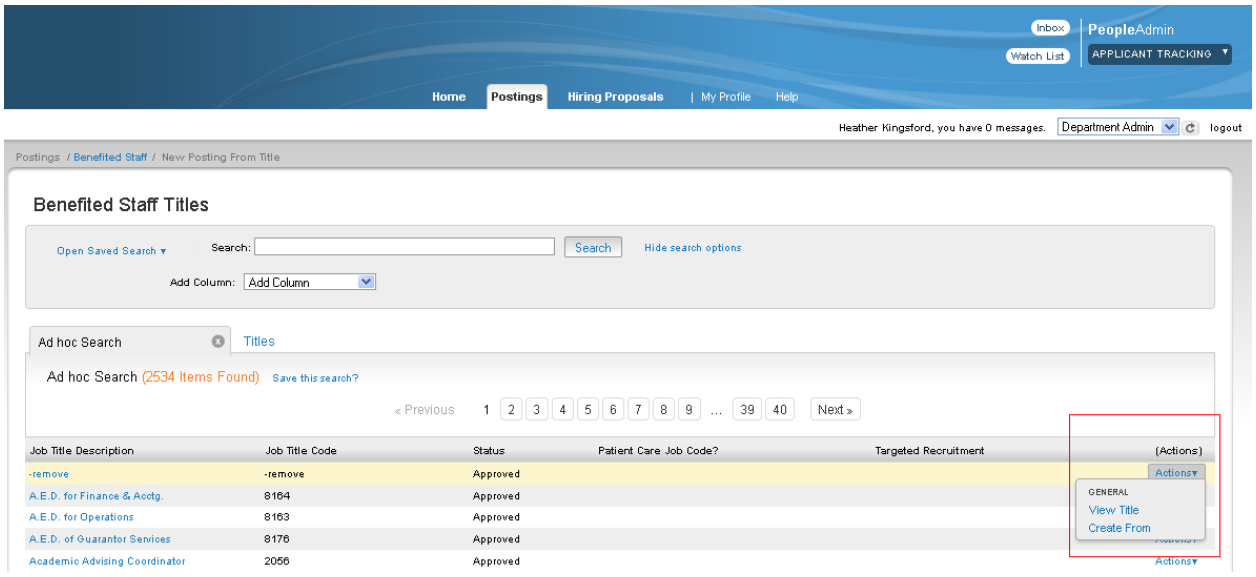
- Click on the **Create from Title** link.



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

"TITLES" Page

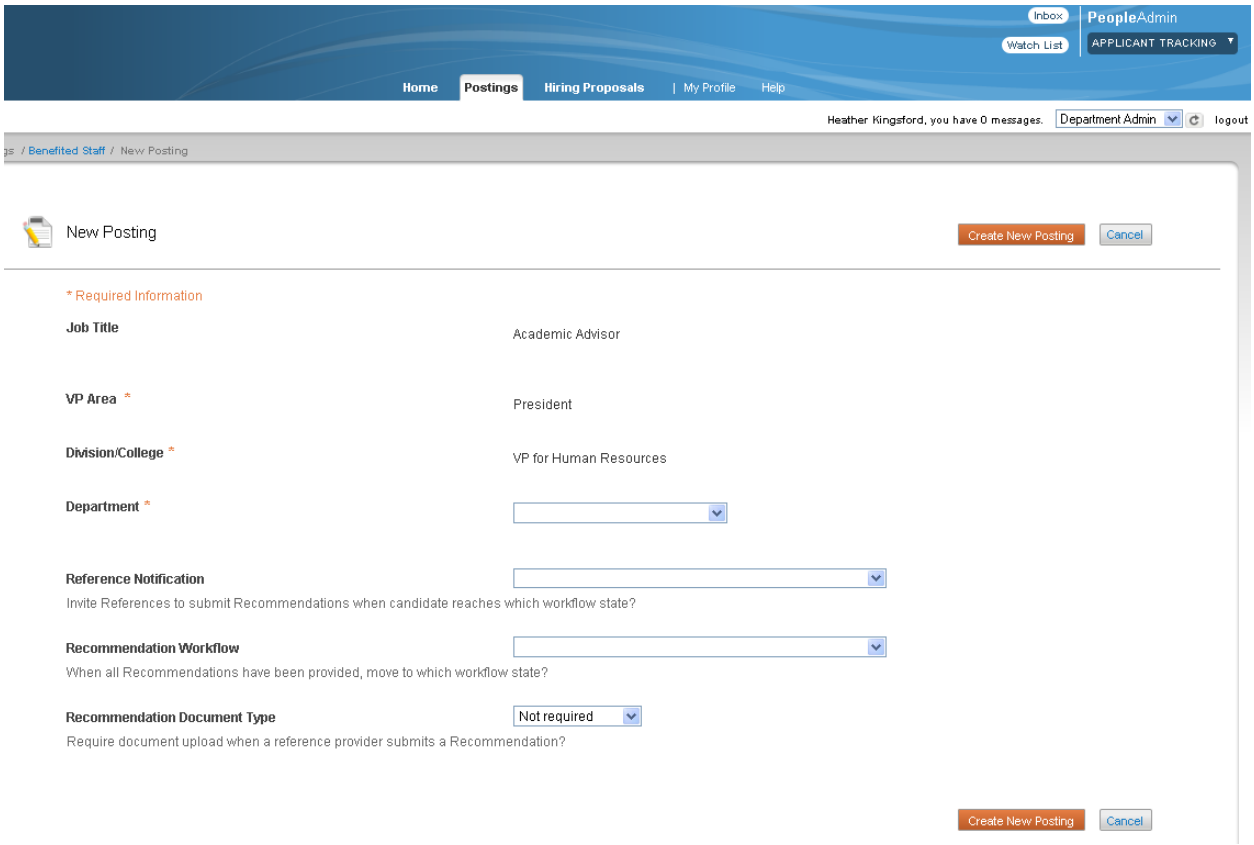
- Enter the **Posting Name** (Job Title) or Job Code into the "search" field. The information should carry over to the next page.
- **Find the title you want, but DO NOT click on the title on the left, as this will open a new page.**



- **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 posting form opens, identify the **VP Area**, **Division/College** and **Department**. The options displayed are based on your ePAF access. (Note: for some users, there will only be one possible selection).

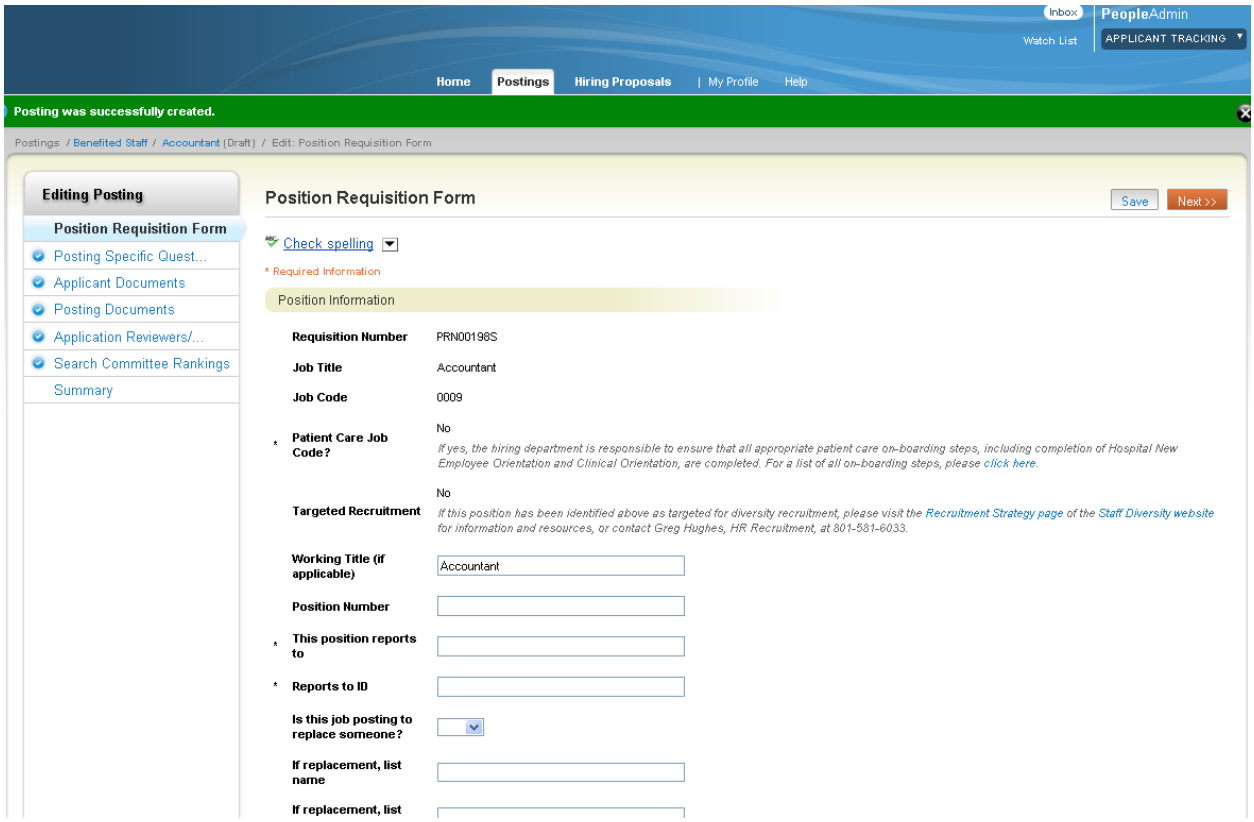


- **Optional:** For faculty and high level staff positions, you may choose to have the system automatically generate an email to the people a candidate identifies to provide reference information. Referees will then link to the PeopleAdmin system from the email and upload documents that attach to the applicant's file. The applicants do not have access to the letters. To do this, see the "Reference Notification" line. There is a drop down menu of options, each of which is a step in the workflow, e.g. On Campus Interview or Recommend for Hire. Select the step at which you want the automatic email to be sent. (See Appendix A for Faculty Workflow). On the "Recommendation Document Type" line is another drop down menu. Select "Reference Letter" in order to complete this step. You may also choose to have the system automatically move applicants to a new workflow step once recommendations have been received by using the "Recommendation Workflow" line drop down menu.
- Then, click the **orange** **"Create New Posting"** on the right.

TIP: *Check your spelling before moving on. This will be available on all pages of the online posting form for your convenience.*

"POSITION REQUISITION FORM" Page

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



> ***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 blue. 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).*

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 **orange** "Next" button on the top or bottom of the screen, on the right.

> ***Notes:*** *For fields that ask for the name and ID of a person, this online form does not yet have the ability to provide a list of names of current employees to select from. A request has been made to the vendor to add this functionality to a future release of this product.*
>
> *"This position reports to" and "Reports to ID" are required so that HR can ensure the proper person receives the 3 month and 5 month probationary period emails*

You are required to 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. With questions, contact HR.

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 "Qualifications" field is not editable, as these have been pre-defined by University Human Resources. If you want to request a change to this field, please send an email to your HR Rep who will coordinate with the Consultant and Compensation Analyst to make a final decision.

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

For Faculty Postings, you will see a "Recruitment Activity" section. Please add the name of each venue in which you will advertise as well as the time it will appear or, for print advertising, the issue or date it will appear. Click the "Add Recruitment Activity Entry" button to add each advertising venue.

For Faculty Postings, you will also see a "Reference Information" section. Use this section if you will be using PeopleAdmin to solicit Reference Letters for applicants. This section will indicate to applicants how many references they should provide. On the "Accept References" drop down menu, select "Yes" to have Applicants provide referees' names and email address.

If you wish to provide the referees with specific instructions that will be added to the standard system generated email, please add those instructions to the "Instructions for Reference Providers" text box.

NOTES: *You may indicate if you wish to post the job on an external job board (e.g. Monster). If you want this service, an email will route to HR Recruitment, who will work with you.*

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.

"POSTING SPECIFIC QUESTIONS" Page

Adding a Question:

- University HR has already loaded required questions for job codes to the question bank.
- In the search field, enter the job code number. This will pull up a list of questions associated with that job code. You will need to add all "required" job code specific questions by checking the box on the left.

- 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, you can filter your search by **Category** or **Keyword.** **Categories** are: none, education, experience, credential, knowledge, language, and physical.
    - To create and add a new question, click on the **blue** **Add a new one** link in the bottom right corner. Then the **"Add a Question"** screen will appear.
        - **Name** the question using the following format:

Four digit job code (space) job title (you may abbreviate) (space) 3 digit category (eg 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

For Faculty Supplemental Questions please use the following format:
FACULTY_3 digit category (e.g. EXP, EDU, TEA, RES, LDR). You may also use the org ID at the end of the question if you choose. For assistance, please contact your respective Faculty Administrator.

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 in order 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

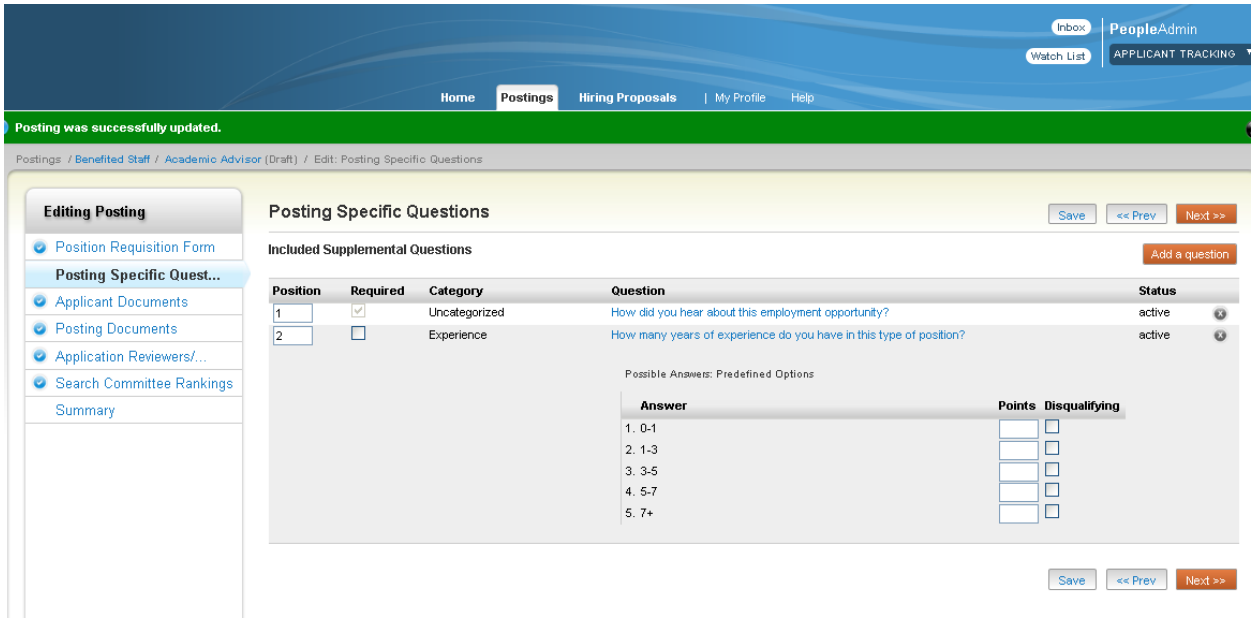
- **Category -** Shows the name selected from the category dropdown menu
- **Question -** Shows the selected question
- **Status** – Shows the approval status of the question

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):

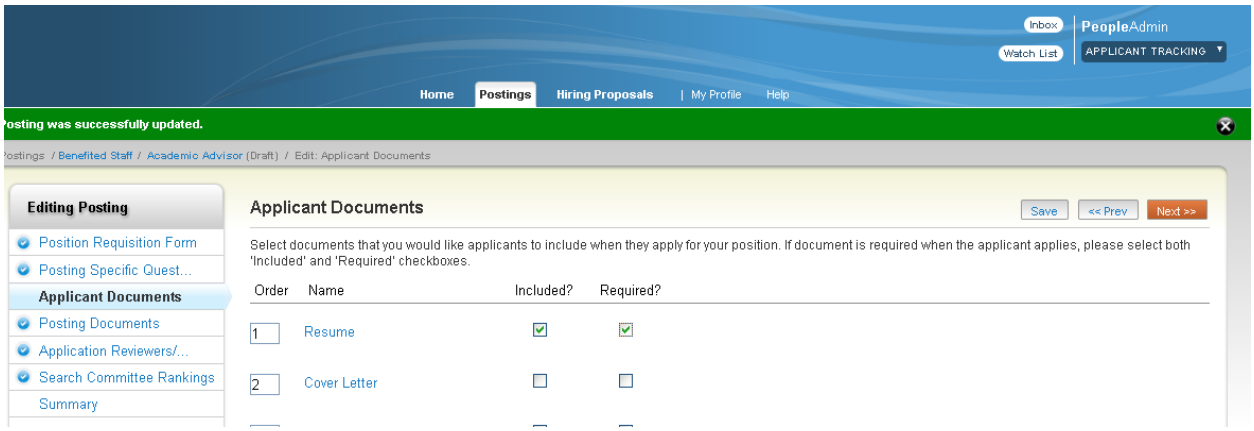
- Click on the title of the question in **blue** to see the possible answers to the question.



- **Possible Answers:** Will show whether 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 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 want to use this option, please consult with HR first.
  - 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 **orange** **Next** 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.

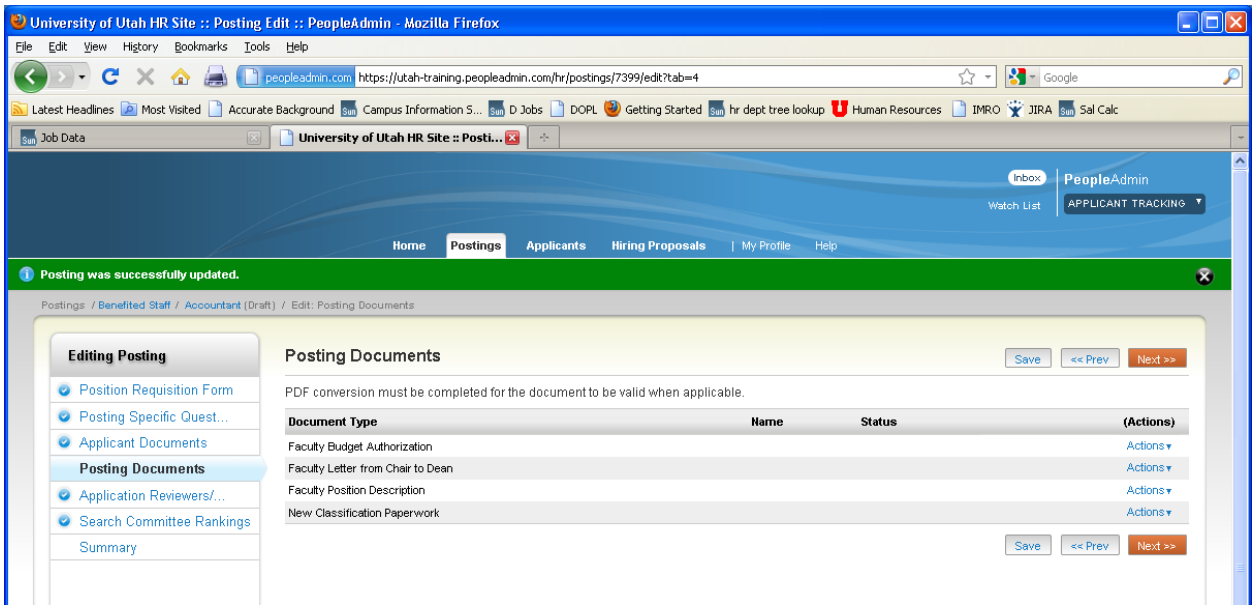


- Optional Documents: Checking box under the **Included?** column will include the document on the posting but give the applicant the option to attach it or not.
- Required Applicant Documents: To require documents you will need to check both boxes under the **Included?** and **Required?** columns.
- If you do not check **Included?** or **Required?** the applicant will not be given an opportunity to attach the document.
- You have the ability to reorder the documents.

Note: *For faculty positions, do not select the Letter of Recommendation options as this will allow applicants to upload letters rather than requesting them directly from the referee. To use the system to request reference directly from the referee, see section on Reference Information under "POSITION REQUISITION FORM" Page.*

"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, HR, or DFA use---these documents are not viewable by the applicant.



- To add a document, click on the **blue Action** link to the right of the Document Type name.
- You can upload a doc, 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.*

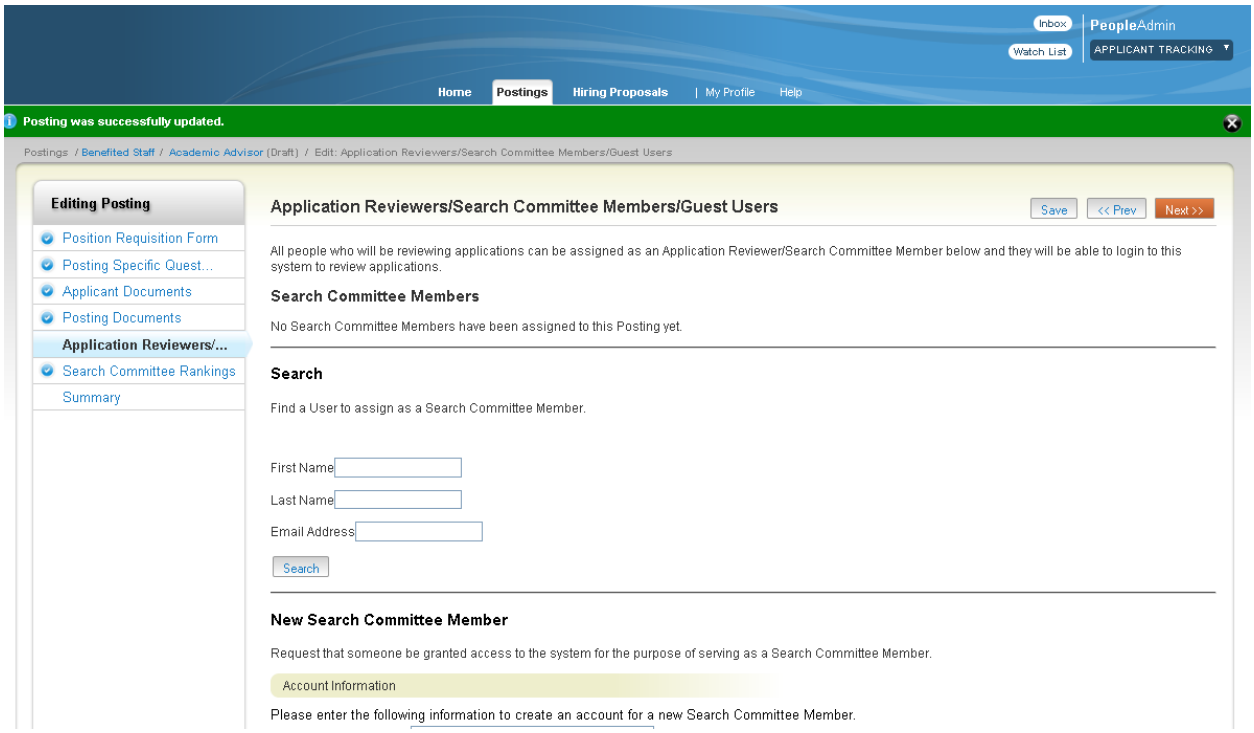
You will have a link to the document that was attached. Click on the link to view the document

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 to be a guest user with view only access to applications.



- You may search for an existing user (all current University of Utah employees) by first name, last name, and/or email address. When the name you are seeking displays, click the **blue Add Member** button.
- To add a new committee member who is not a current University of Utah employee, fill in the **Account Information** for that member under the **New Search Committee Member** section and click the **Submit** button. You must also complete and submit an Affiliate form to HR to obtain a uNID for that member. Then, when their uNID is active, they can be assigned as a committee member.

TIP: *Outside of assigned workflow roles, as defined on page 5 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 DFA or 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. Now you will see the "Add a Ranking Criteria" box pop-up.
- Click on the **Add a new one** link at the bottom of the Add a Ranking 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 **blue** **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. Now you will see the "Add a Ranking Criteria" box pop-up.
- Use the **Keyword** search
  - Search for criteria that was 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.
  - 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.*

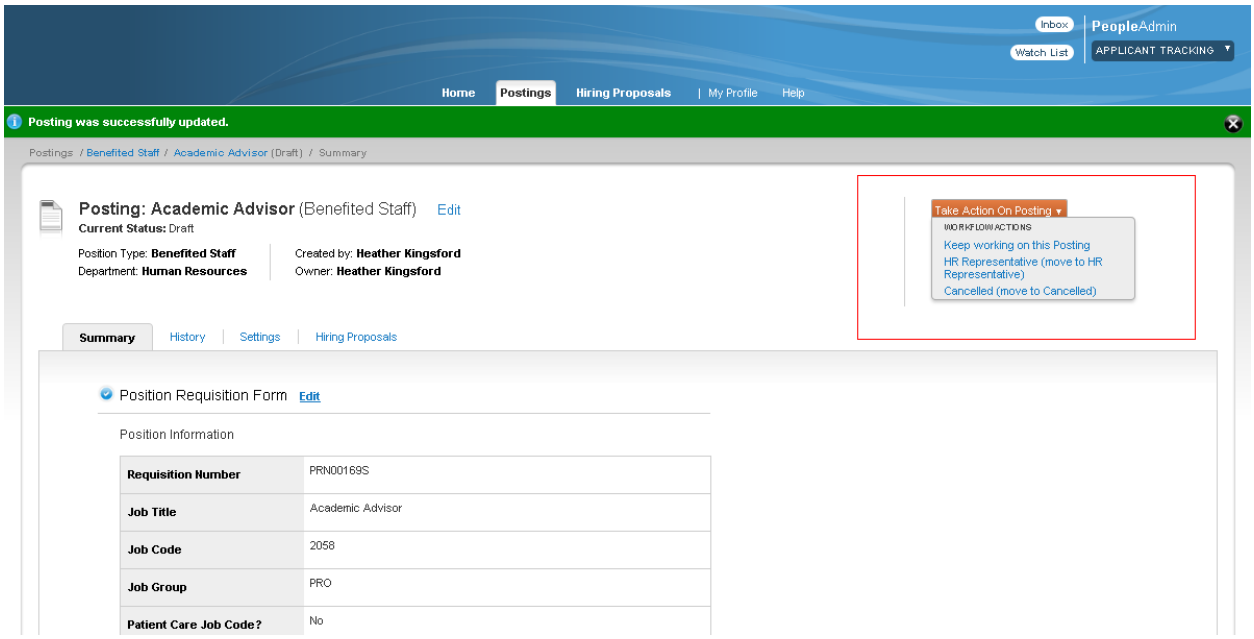
When you assign people to the Search Committee, you may assign someone to be Search Committee Chair. After all committee members rank applicants, the Chair can view all rankings. You can also assign all other members as "Chair" so that they can also view all rankings.

- Once you have entered in all necessary information on the online Position Requisition Form, select the **blue** **Summary** link on the left hand navigation bar or click the **orange** **Next** button on the upper right.

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

"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** **Edit** link.

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)

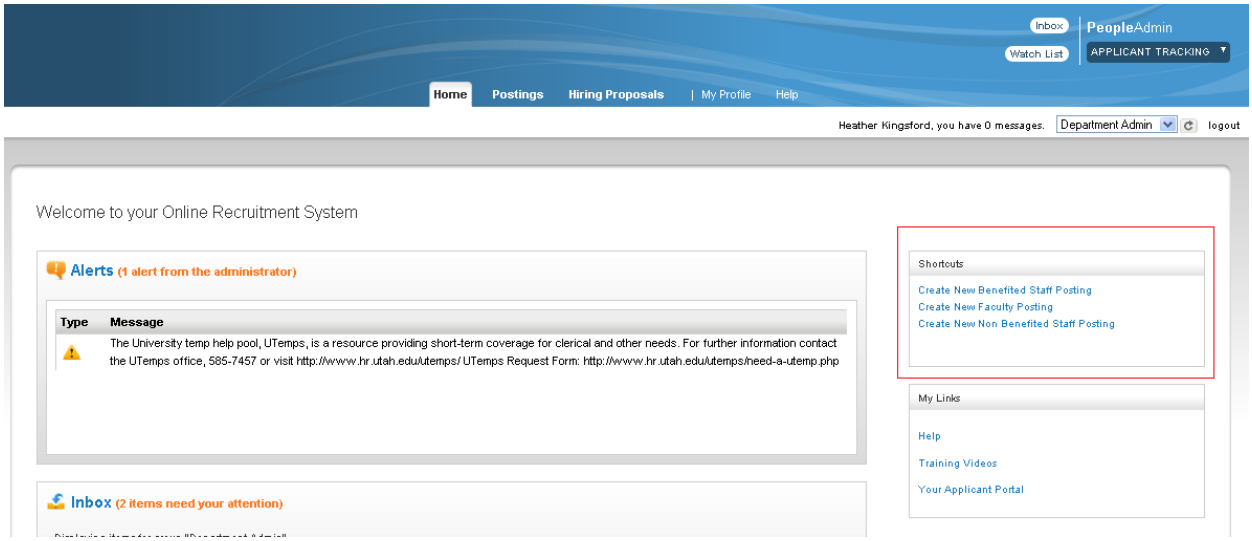
- In the right hand action pane, if you hover over the **orange** **Take Action on Posting** button, you will see your options for moving the posting on in the workflow. Select the next state to which you would like to send the posting.

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**

Workflow Step #1b: CREATE A POSTING from a Previous Posting
Owner: Dept Admin or Dept Approver

The steps for creating a posting from a Previous Posting are the same steps as you would walk through when creating a posting From a Title.



- Select Posting → Pick Position Type (or from **Home** page choose link under the **Shortcuts** section on right hand action pane)

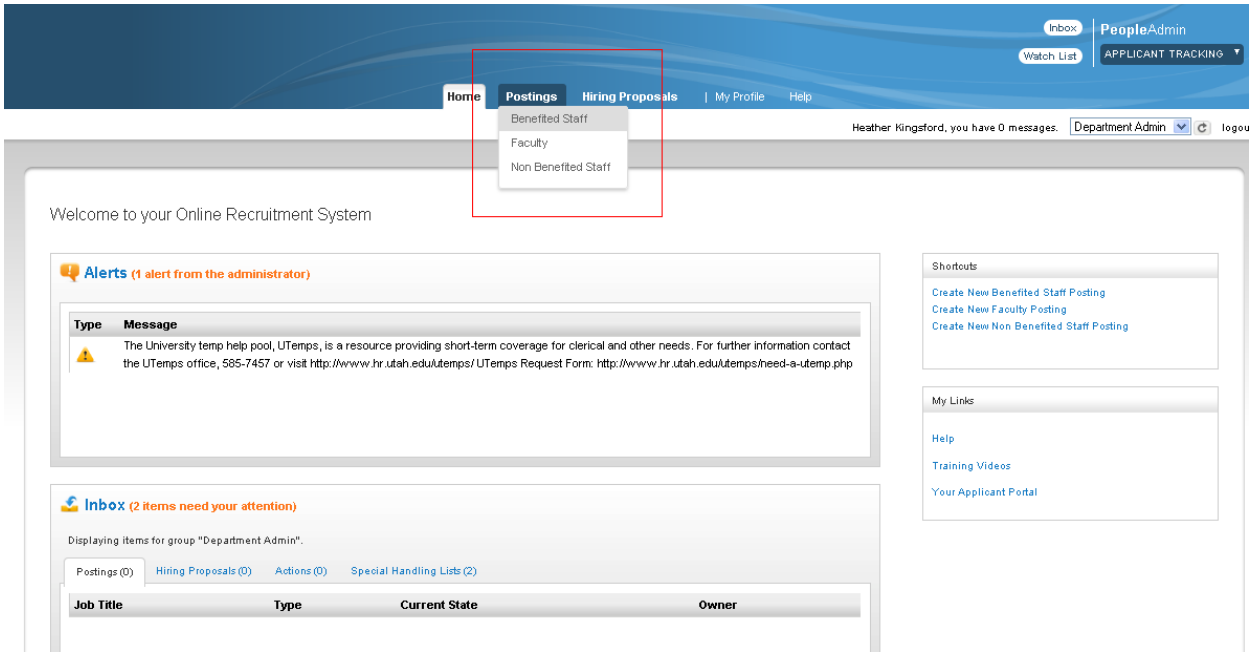
- Find a previously created posting in the system, hover over the **blue** **Actions** link on the right, and click on "Create From." This will create a new Posting by copying some portions of the previous posting.

- Fill out the appropriate information on each page and submit the posting for approval. Please reference the step by step instructions located under the Workflow step #1a above.

Workflow Step #2: REVIEWING APPLICANTS

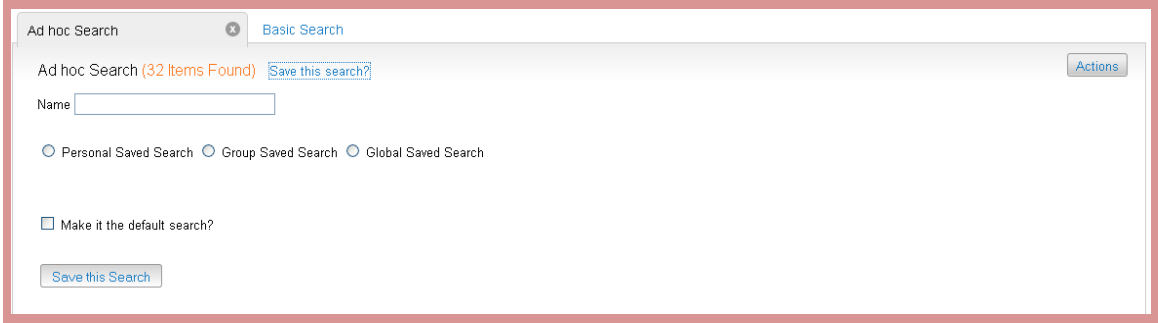
Owner: Dept Approver, Dept Admin, DFA, plus anyone you assigned as an Applicant Reviewer/Search Committee Member/Guest User.

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

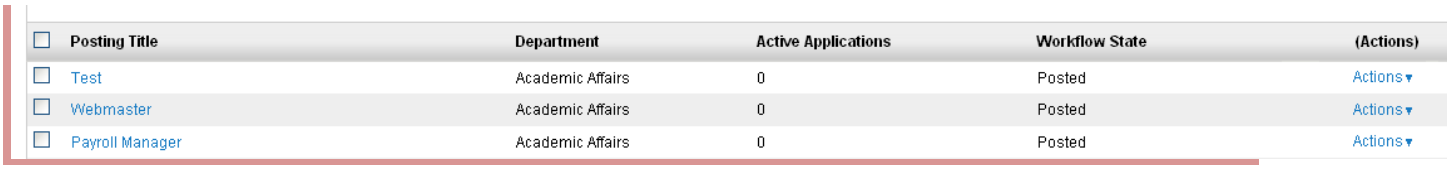


SEARCHING/VIEWS

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.

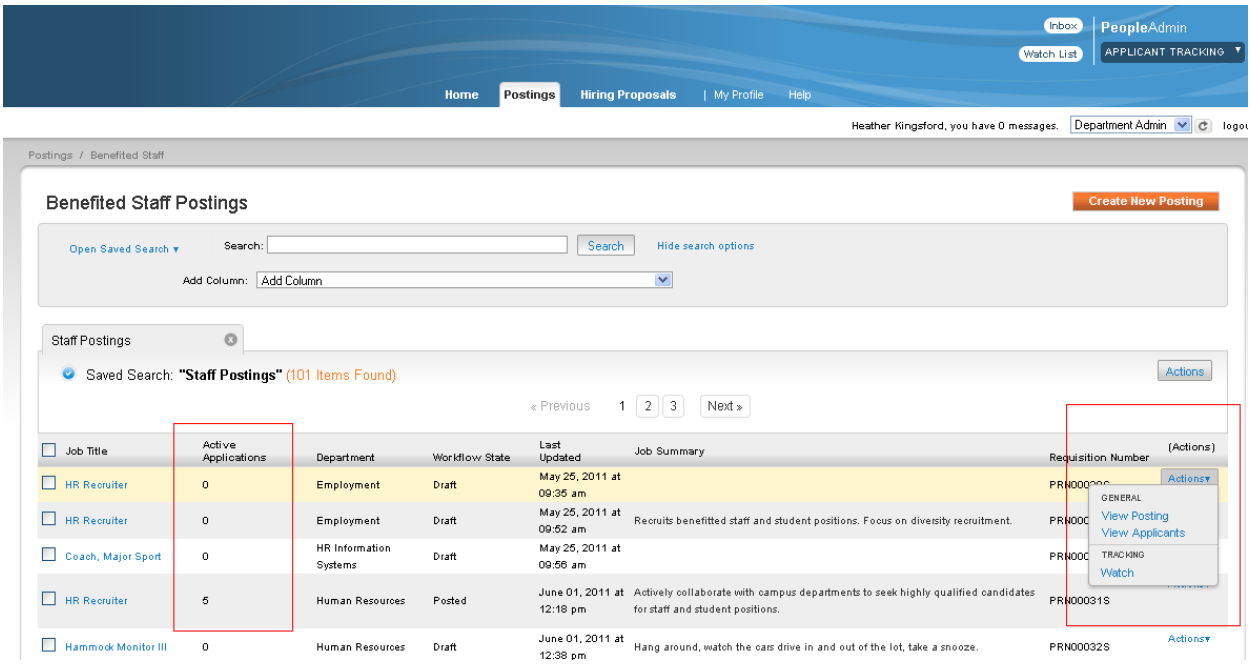


Posting Title	Department	Active Applications	Workflow State	(Actions)
Test	Academic Affairs	0	Posted	Actions
Webmaster	Academic Affairs	0	Posted	Actions
Payroll Manager	Academic Affairs	0	Posted	Actions

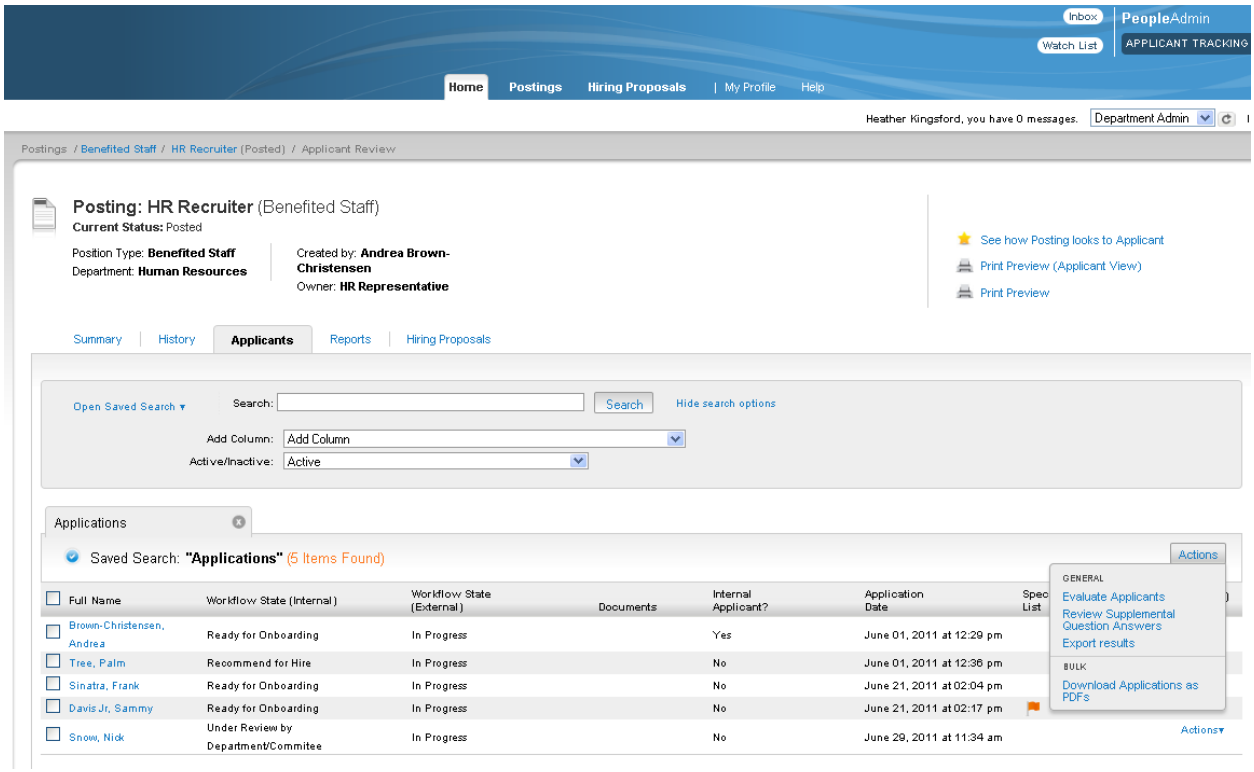
Note: *If you ever try to conduct a search, and the line "Ad hoc Search" says items were found, but you cannot see them, create search criteria as follows:*

1. *Click on "More Search Options" next to the "search" field*
2. *This will bring up a field called "Add Column." Click on that column to see a variety of search criteria.*
3. *Select the criteria you want.*
4. *You search results will display.*
5. *Then hit "Save this search?" next to the "Ad hoc Search" line, so that you can use the same search criteria again in the future.*

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

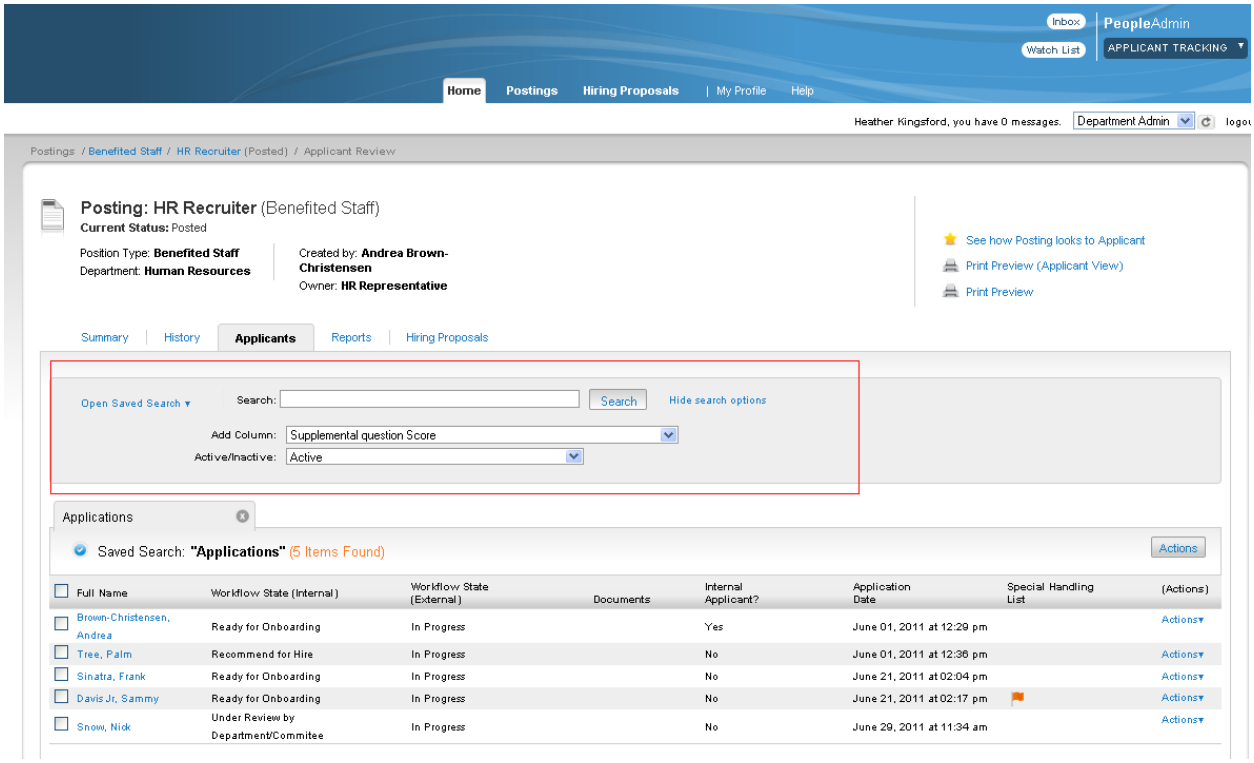


- There are two ways to get to the **Applicant Review** Screen:
  - To view the applications, click on the **blue** job title name link on the left, and then on the following page click on the **blue Applicants** link. **OR**
  - You can hover over **blue Action** link on the right side of the job title, then select **View Applicants**.

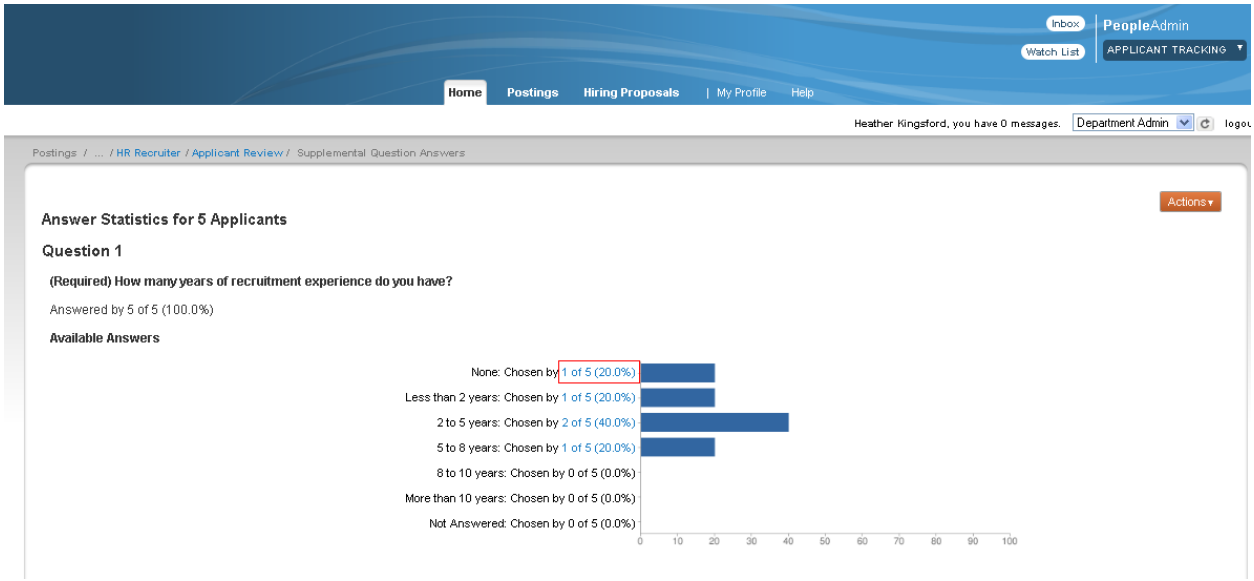


- From the **Applicant Review** screen you will be able to perform several actions.
    - To review an applicant's application, answers to the supplemental questions, and attachments, you may either:
        - Click on the applicant's name, OR
        - Hover over the **blue** **Actions** link on the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

- To view all applicant scores, click on the **blue** "More search options" link to the right of the "Search" field. This will reveal an "Add Column" field. Select "Supplemental Question Score." Now you will see the scores displayed. To save this format, you'll see a blue "Save this search?" link right above the rows of applicants.



- You may "Review Supplemental Question Answers." To review the answers statistics for the Supplemental 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 name **(**if you'd 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 the **Review Supplemental Questions Answers** link. You are now on the **Answer Statistics** page.

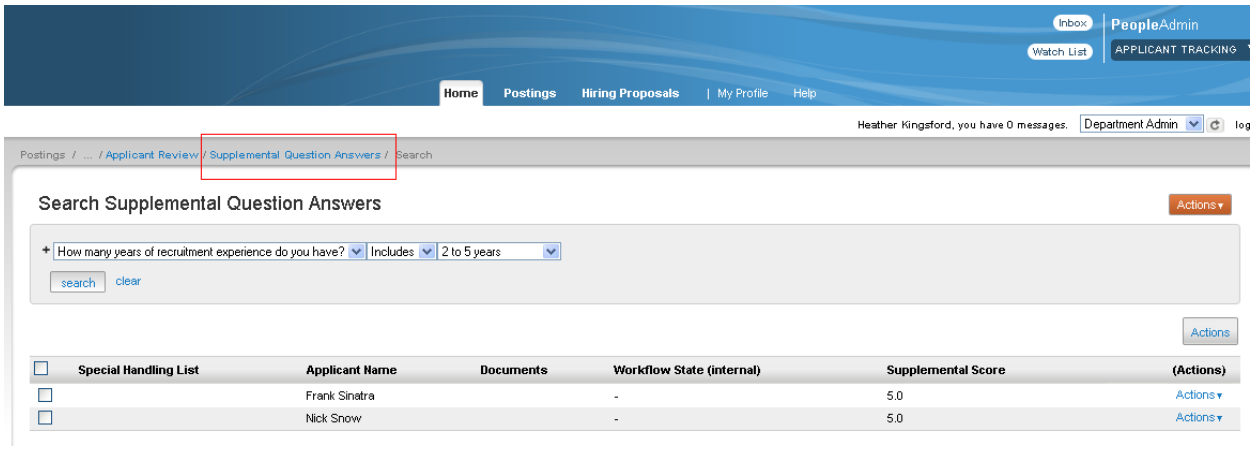


TIP: *Anything in blue font in the system is a hyperlink.*

- 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.

  OR
  - Hover over the **orange** **Actions** button and select **Search Answers** to search for the answers to specific questions.

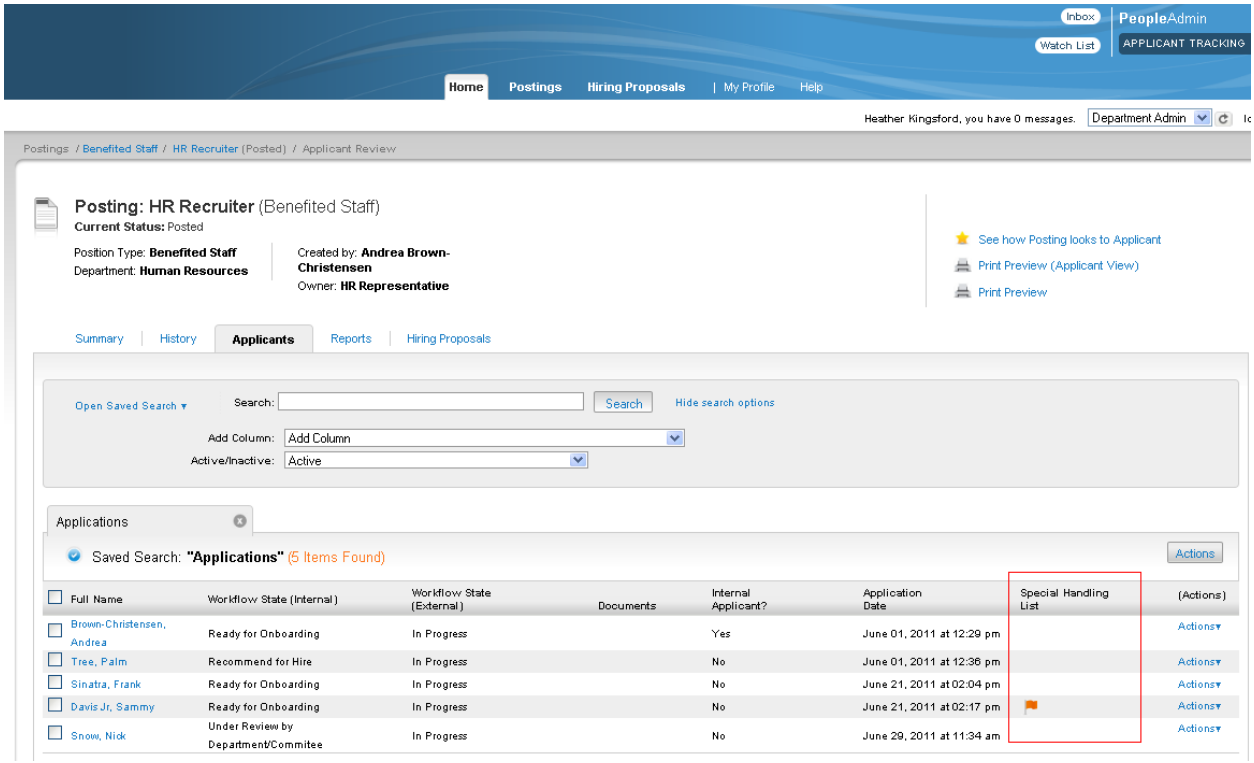
- To return to the previous page, you'll see a gray menu bar – click on the **blue** "Supplemental Question Answers" link.



- 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 yellow flag in the column “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: http://www.hr.utah.edu/forms/lib/Addendum.pdf).
  - RIF (They have RIF interview preference for 6 months.)

Note: *In the future, this system will be updated so you will have the ability to view the status yourself. HR will notify you when that system change has been made.*

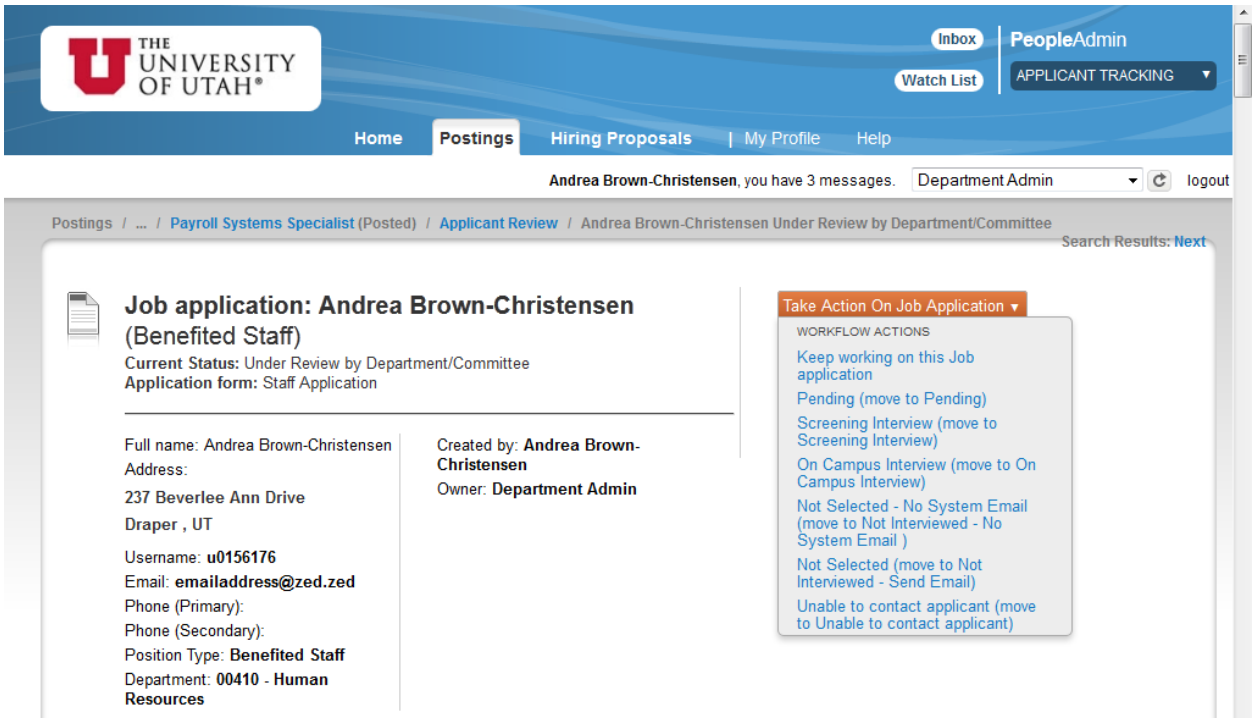


Workflow Step #3: MOVE APPLICANTS THROUGH THE WORKFLOW (SCREENING/SELECTION PROCESS)

Owner: Dept Admin, DFA, 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 (this can be by phone or in person)
  - On Campus Interview (usually in person)
  - Not Selected – No System Email (use this option when you prefer to notify the applicant yourself)
  - Not Selected – Send Email (this will automatically send an email to the applicant letting them know they were not selected)
  - Unable to contact applicant

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



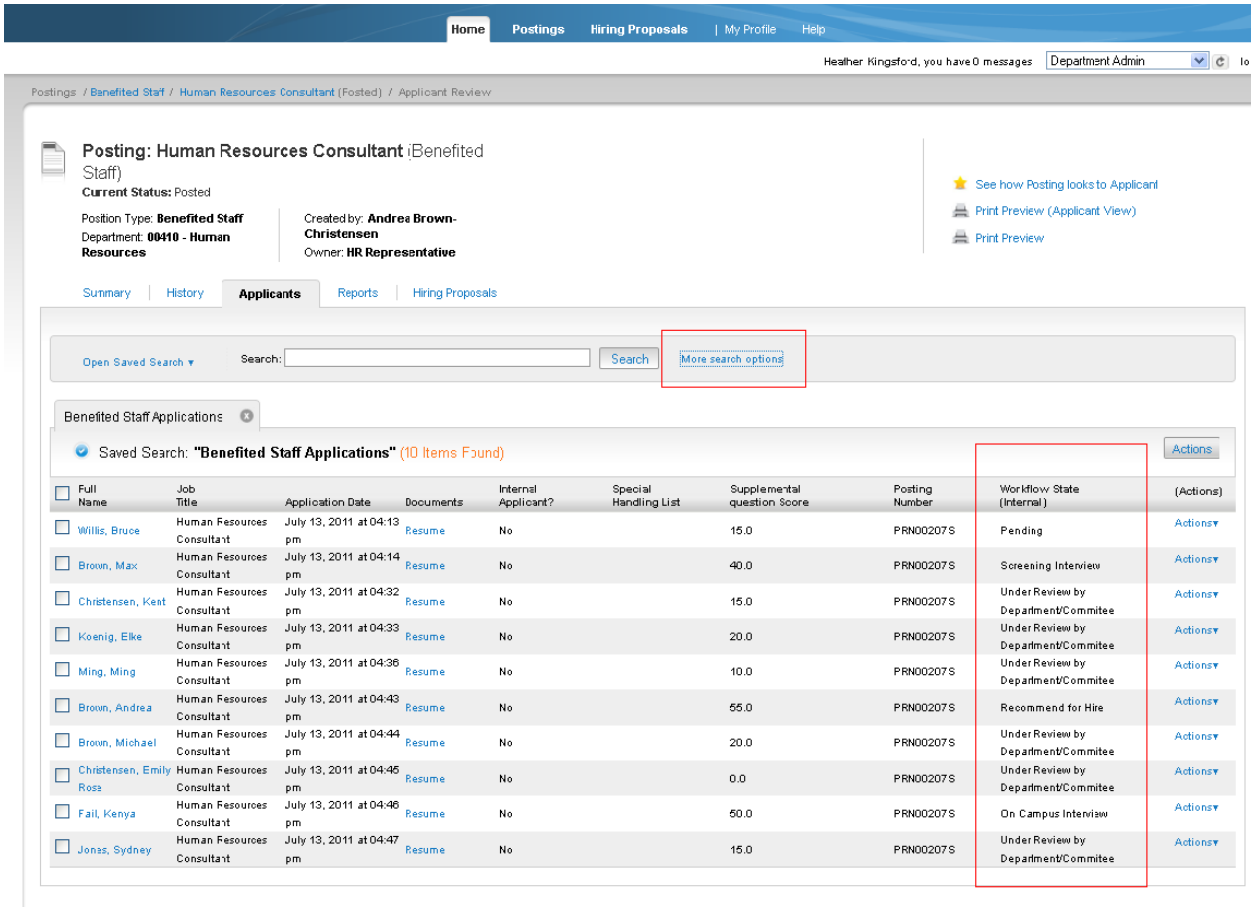
- When you select the option you want for the applicant, you may make a comment, you may put the item in your "Watch" list, and you will need to "submit."

- After an applicant has had the "On Campus Interview," the following workflow options will be available:
  - Keep working on this job application
  - Interviewed – Not Selected – Send Email When Filled (this will automatically send an email to the applicant letting them know they were not selected after the successful candidate is hired)
  - Recommend for Hire – Begin Hiring Proposal
  - Interviewed – Not Selected – No System Email (use this option when you prefer to notify the applicant yourself)

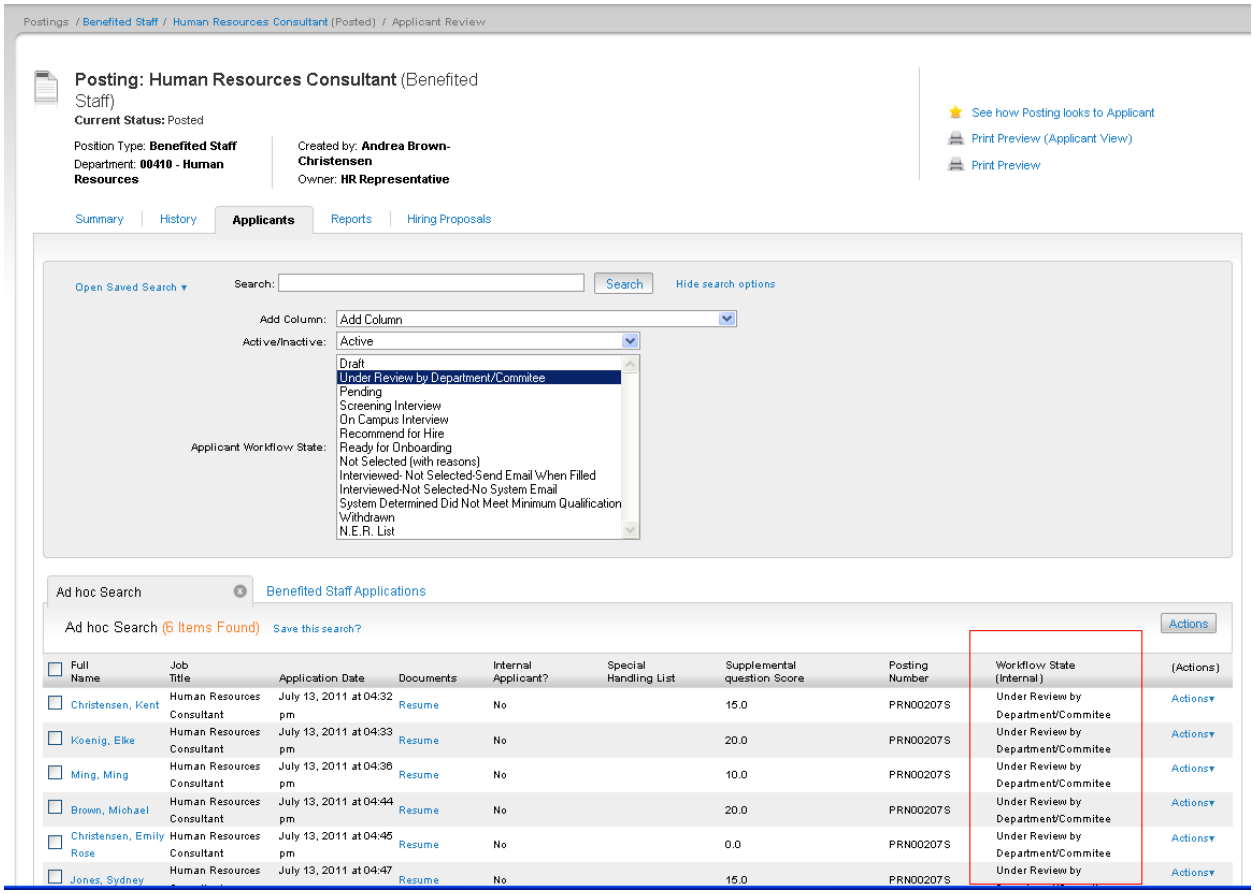
Notes: For every applicant who is interviewed and not selected, you need to provide a reason.

While you are moving all applicants through the workflow, your actions in the system are documented, so reports can be run from the system. Therefore, 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**" link next to the Search field.

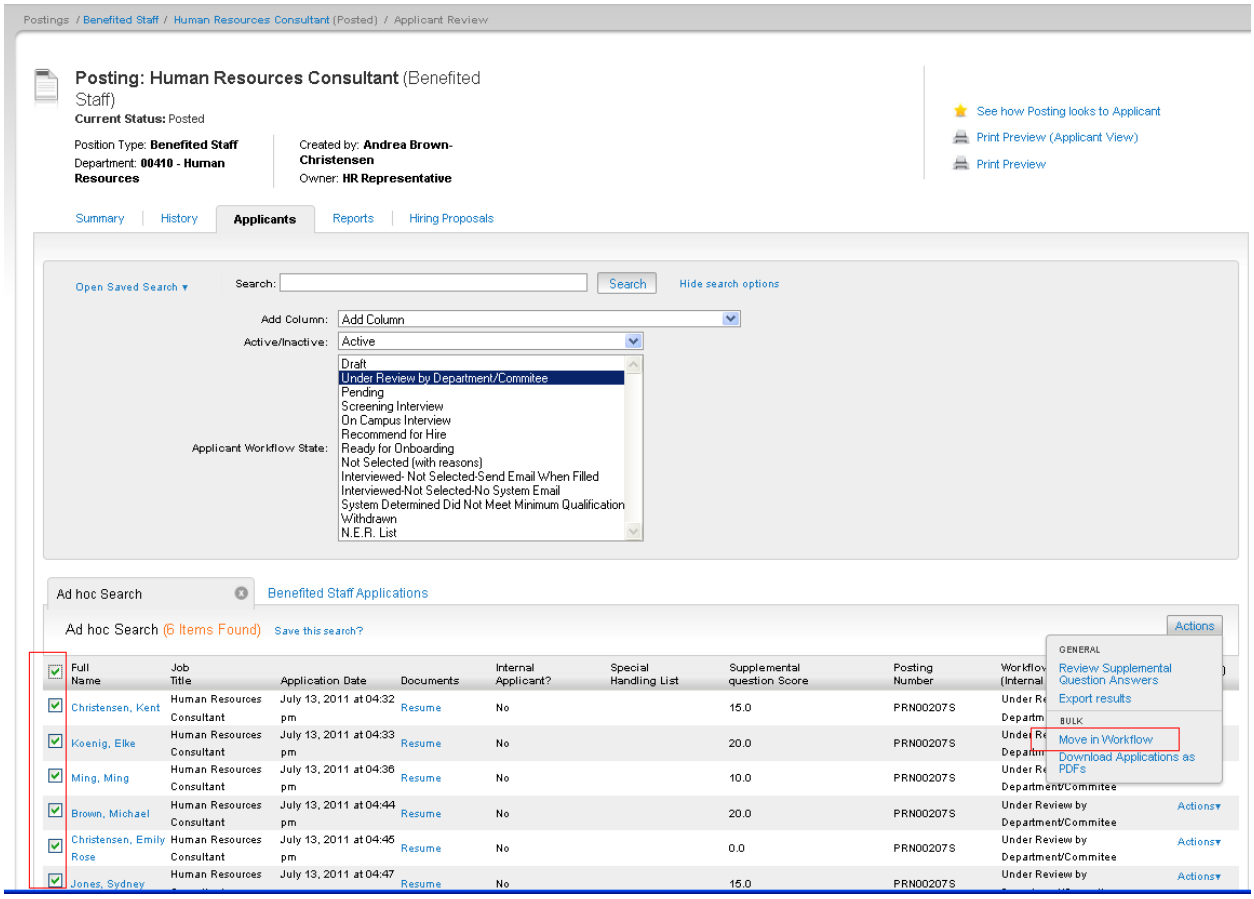


Now, you are able to search based on "Applicant Workflow State." For example, click on "Under Review by Department/Committee," then hit the **blue** "Search" button.

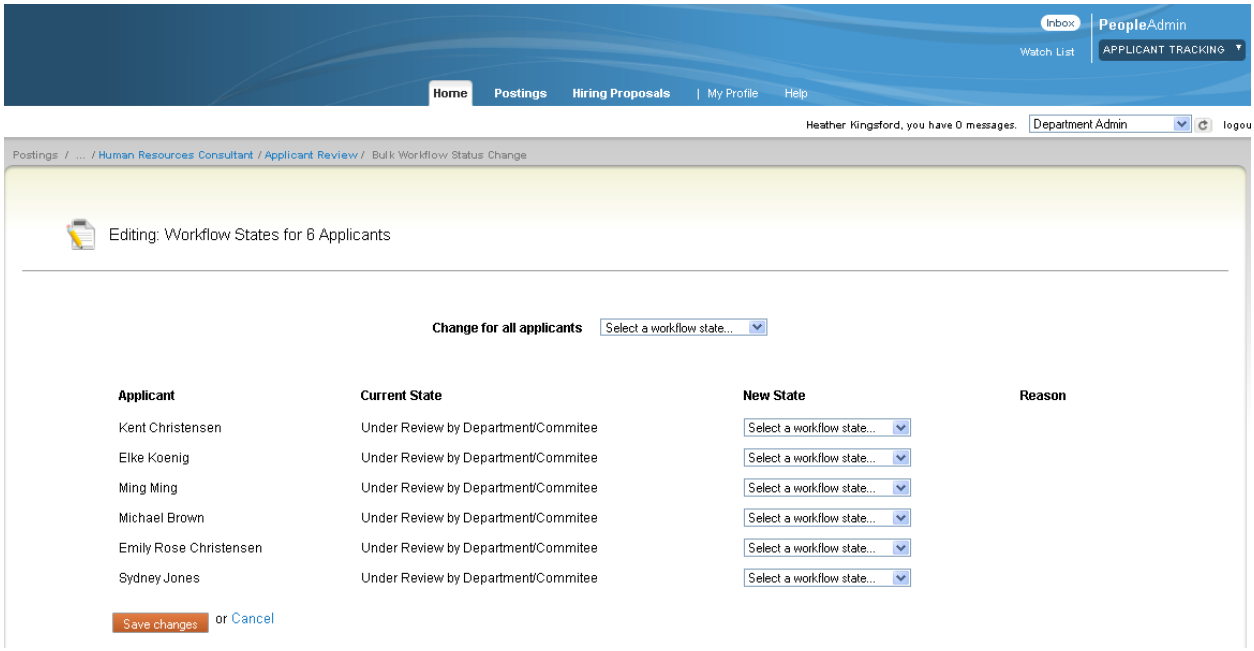


Now you will only see the applicants in that Workflow State.

Next, look above the list of applicant names, and you will see a checkbox that says "**Full Name**." Check the box to the left. That will check all names. Then go to the **blue** "**Action**" button on the right hand side. Hover over it, and you will see a header in **black** called "**bulk**." Under that, you will see an option in **blue** called "**Move in Workflow**." Click it.



Now you will 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 drop-down menu options. Select the option you want, for example “Screening Interview.” Then hit the orange “Save changes” button on the lower left. This will change the Workflow State for all selected applicants.



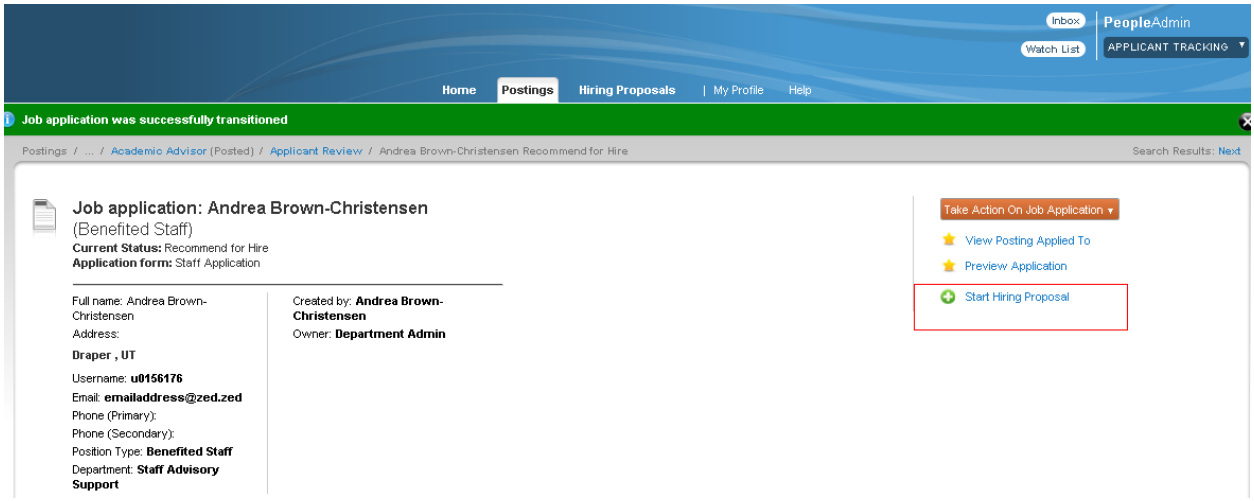
Workflow Step #4: CREATE HIRING PROPOSAL and CONDITIONAL OFFER

Owner: Dept Admin, DFA, and HR

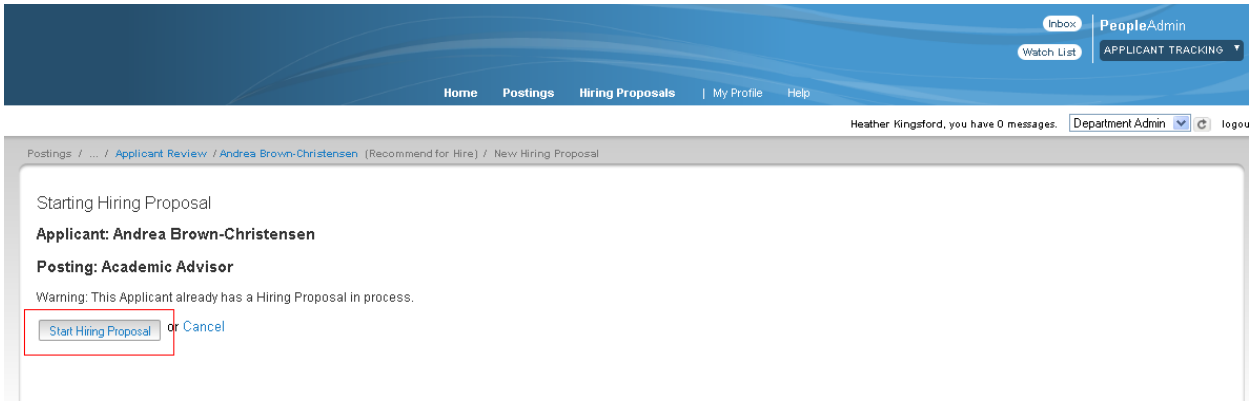
Once the applicant review process has been completed and the candidate or candidates you would like to hire have been transitioned in the workflow to "Recommend for Hire," then the hiring proposal option will display.

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.
  - On the right hand side, under the **orange** **"Take Action On Job Application"** button, a "Start Hiring Proposal" link has appeared. Click it.

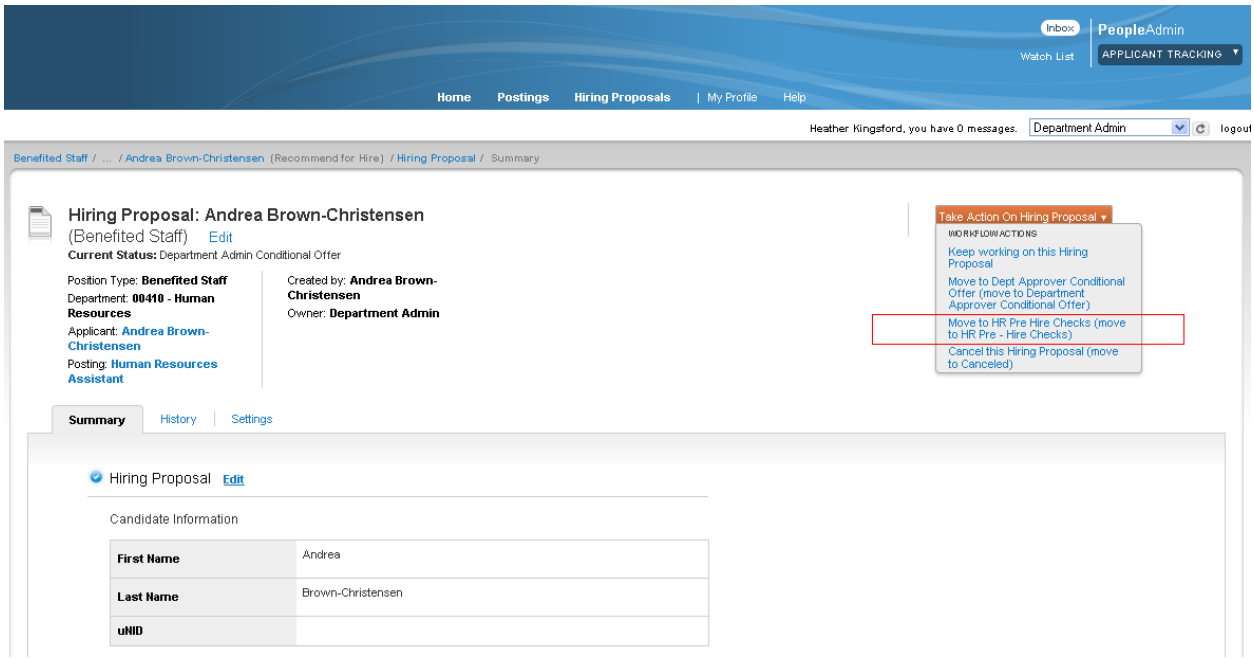


  - Now you'll see a "Start Hiring Proposal" button on the left. Click it.



  - Now you are on the **"Hiring Proposal"** page. All fields will be reviewed by HR/DFA.

- When the first page of the Hiring Proposal is completed, click "Next."
- Now you are on the "Hiring Proposal Documents" page. Attach documents as relevant for the position type. Then click "Next."
- Now you are on the "Hiring Proposal" summary page. Check all information and when completed, hover over the **orange** **"Take Action On Hiring Proposal"** button on the right. Your options are:
    - Keep working on this Hiring Proposal
    - Cancel this Hiring Proposal
    - Department Approver Conditional Offer
    - HR Rep Pre Hire Checks (this routes the proposal to HR to await results of the pre-hire checks)
    - Canceled
- After you have contacted the candidate, made a conditional offer, and the candidate has accepted the conditional offer, select "Move to HR Pre Hire Checks."



- For faculty position types, you may now edit the information on the Faculty Hiring Proposal Screen.
    a. Under "Position Information" enter the following information
        i. Enter Start Date
        ii. Proposed Hire Rank
        iii. Proposed Job Code
        iv. Base Salary
        v. Faculty Vote on Hire (Optional for SOM departments – must do this prior to submitting hire epaf)

vi. Faculty Vote on Rank Optional for SOM departments – must do this prior to submitting hire epaf)
vii. Please list funding sources or requests to be reviewed by Department Approver, Dean/Org Head, and Cognizant Vice President
viii. Enter Selection Justification

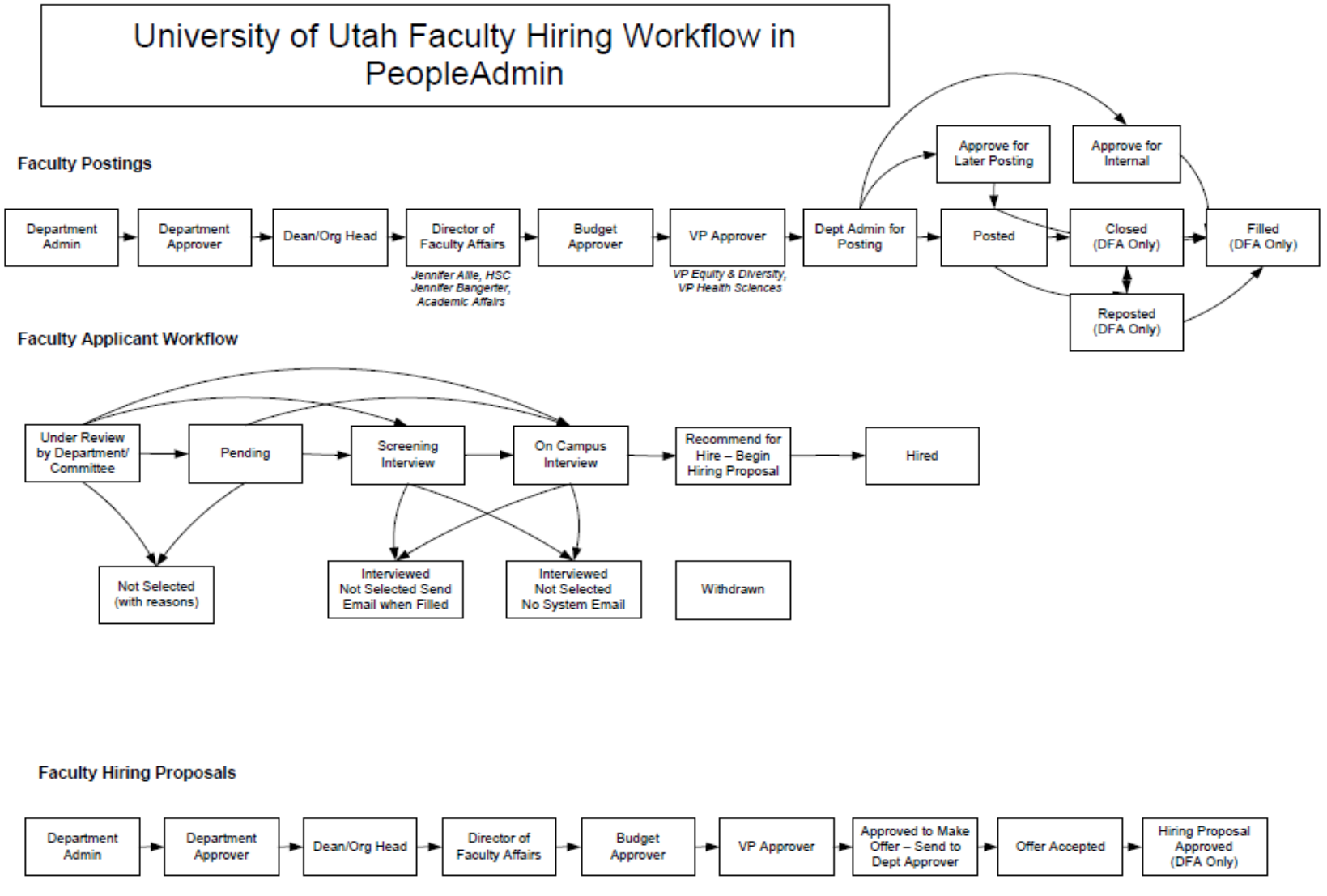
b. "Hiring Proposal Documents"
   i. Attach Letter from Chair to Dean (Required for Faculty)
   ii. Attach Draft Offer Letter (Required for Faculty)
c. Once approved by DFA, Dean, VP Hiring Proposal will be returned to Dept Admin to "Extend Offer"
d. Once Candidate has Accepted Offer Dept Admin will transition to "Offer Accepted"
e. Once Department has received Clear to hire notification from Human Resources Transition Candidate to "Ready for EPAF."
f. **From the time the DFA moves your successful candidate to "Ready for ePAF," it will take one business day before you can initiate the hire ePAF.**

Workflow Step #5: PRE HIRE CHECKS AND HIRE

Owner: Dept Admin, DFA, and HR

- Now you are ready to initiate the Criminal Background Check (CBC), the Drug Screen (if applicable), and the reference checks. Feel free to contact HR for assistance.
- HR will receive the results of the CBC and drug screen, then move the application to "Ready for Onboarding."
- When the candidate is cleared for hire, you will receive a notification email.
- **From the time the HR Rep moves your successful candidate to "Ready to Onboard," it will take one business day for the applicant's data to be fed from PeopleAdmin to PeopleSoft, then you can initiate the hire ePAF.**
- Initiate the hire ePAF and begin the I-9 process. Feel free to contact HR for assistance.

Congratulations! You've just hired a new employee!


University of Utah Faculty Hiring Workflow in PeopleAdmin
Faculty Postings
Department Admin
Department Approver
Dean/Org Head
Director of Faculty Affairs
Jennifer Allie, HSC
Jennifer Bangerter, Academic Affairs
Budget Approver
VP Approver
VP Equity & Diversity, VP Health Sciences
Dept Admin for Posting
Approve for Later Posting
Approve for Internal
Posted
Closed (DFA Only)
Filled (DFA Only)
Reposted (DFA Only)
Faculty Applicant Workflow
Under Review by Department/ Committee
Pending
Screening Interview
On Campus Interview
Recommend for Hire – Begin Hiring Proposal
Hired
Not Selected (with reasons)
Interviewed Not Selected Send Email when Filled
Interviewed Not Selected No System Email
Withdrawn
Faculty Hiring Proposals
Department Admin
Department Approver
Dean/Org Head
Director of Faculty Affairs
Budget Approver
VP Approver
Approved to Make Offer – Send to Dept Approver
Offer Accepted
Hiring Proposal Approved (DFA Only)

Appendix B: Applicant Perspective

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 must still fill out applications to apply to a particular position and the system will keep track of their most recent information used on each application type and pre-populate new application forms with this information each time they apply to a position. This should go a long way in reducing your workload when it comes to updating contact information for applicants and then applying the most recent version of their application to all jobs to which they have applied.

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 such as resume, cover letters, etc without going through the application process
- Update the 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:

- Go to the Applicant Site: https://utah-training.peopleadmin.com **(Note: this is the training version).**
- Create a new applicant account by selecting **Create Account** on the left menu.
  - Fill in all information asked on creating the applicant account and click **Create**.

  Note: *Effective August 8th, applicants will go here to apply for jobs: http://www.employment.utah.edu/ (which is the same as today). Internal University employees will use their uNID as their username, but then will be prompted to create a new password.*

- To add documents (eg resume, cover letter, etc) prior to completing an application, click on the **red Your Documents** link on the upper left hand menu and choose the **blue Add Document** link.
  - Upload a document of your choice.
  - View the document once it is uploaded and converted.
  - Click the **red Home** link on the upper left hand menu to return to the main applicant page.
- Search options on the main page:
  - To search for all staff jobs, both Benefited and Non-Benefited, click the "Staff Jobs" button.
  - To search faculty positions, click on the "Faculty jobs" button.
  - To search for Non-Benefited Staff jobs only, click on the "Student jobs" button.
  - To search for patient care jobs only, click on the "Patient Care Jobs" button.
  - To search for all open positions, click the **red Search Jobs** link in the upper left hand list.
- After you've clicked a button (as described above,) there are a couple of ways to search for jobs:
  - Use the keyword search to narrow down your search results.
  - Use one or more of the other search criteria to narrow your search results.
- Apply to a Job:
  - Find a Job to apply too and click on the **blue** job title link.

- Click the **Apply to this Job** button on the right.
- Begin filling out your application. Fill in all information on every page. You may add multiple entries of builder information (eg education and experience) on the application.

  Note: *The open text box under the Conviction History question must be completed. If the applicant answered "No" to the Conviction History question, then they may just state "N/A" in the open text box.*

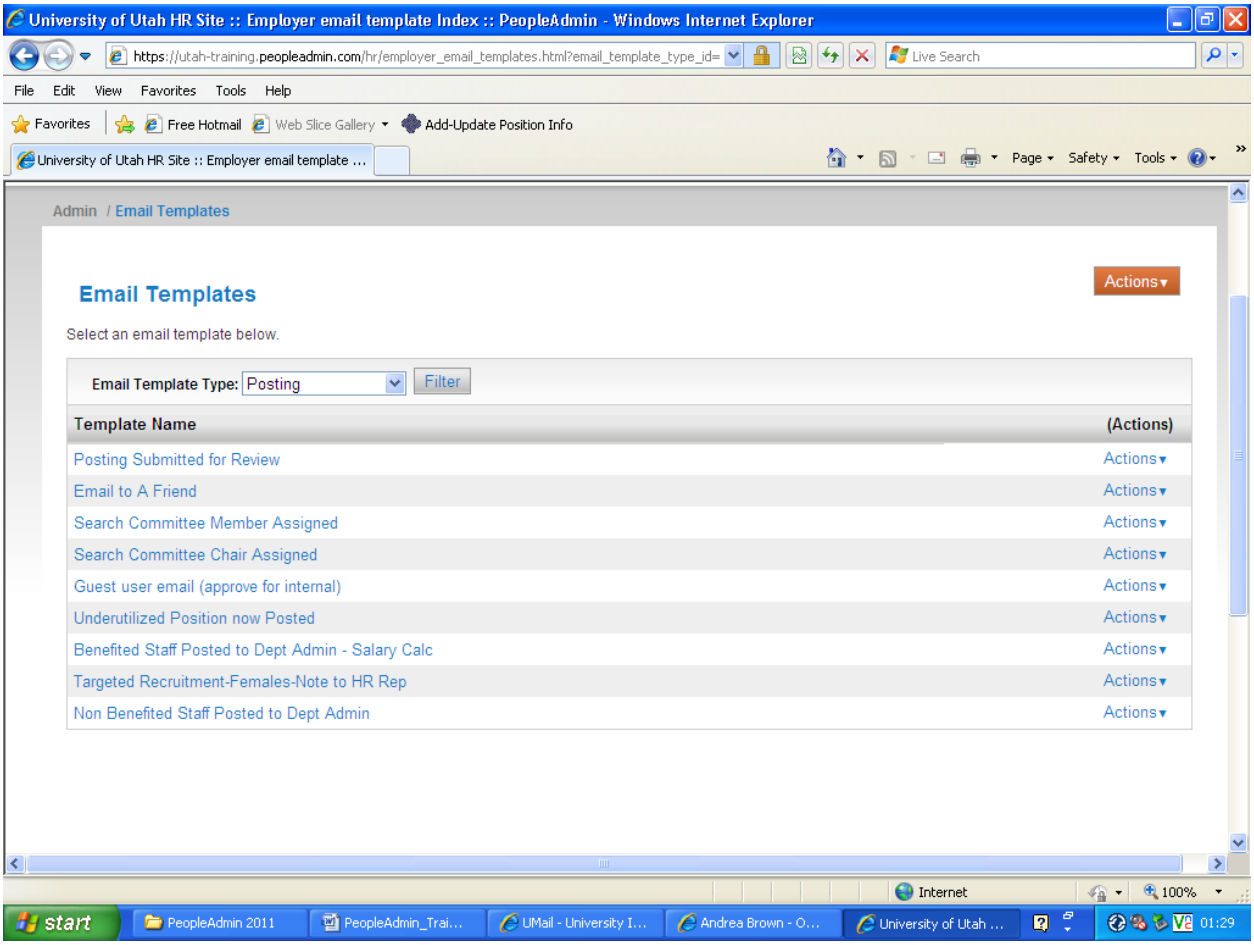
- The "Save changes" button saves your work and keeps you on the current page. The "Next" button saves your work and moves you to the next page.
- On the right hand side, both top and bottom, is a drop-down menu box. This allows you to go to different sections of the application. Select the section you want, then click "Go."
- Attach documents as needed for applying to the job.
  - You may upload a document
  - You may write a document
  - You may select a previously added document
- Before submitting, go to the drop down menu on the bottom right hand corner or upper right hand corner and select **Check for Errors** and hit "Go."
  - Verify all data you entered is correct.
  - Click the **blue** **print version** right under the phrase "Application for…" Verify all information is correct.
  - Return to the application by closing the current open window and click **Certify** and **Submit** at the top or bottom.
  - Certify your application by reading the Certification paragraph, checking the "I certify…" box, entering your initials, and clicking the **Submit this Application** button.
  - Fill in voluntary demographic information if prompted.
    - If you are not prompted, complete the application process and receive your confirmation number. Then click on the **red** **Demographic Info** link on the left menu and fill out the information on this form.
- Make note of your confirmation number and view the message (either pass or fail message).

➢ Find the application you just filled out by clicking on the **red** **Your Applications** link on the left menu.

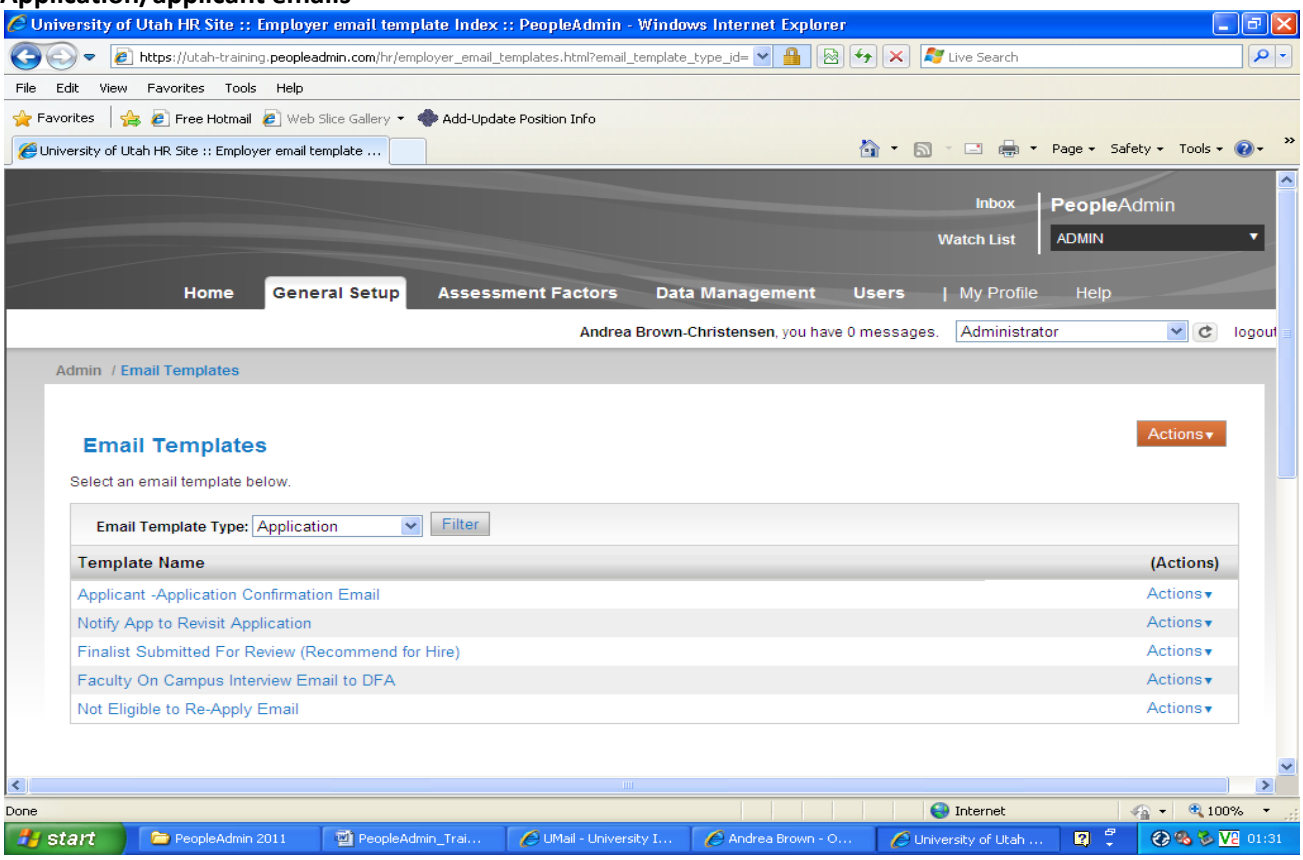
- View your completed application.
- View any documents you attached while applying to the job.

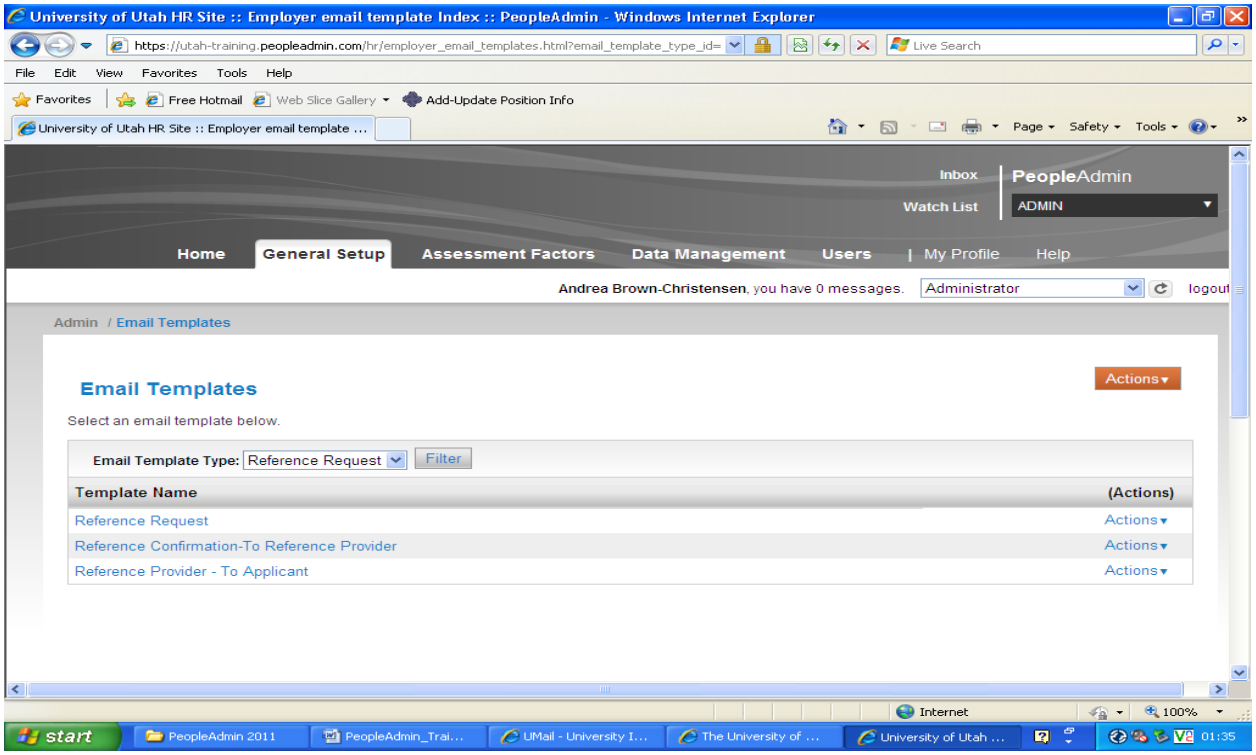
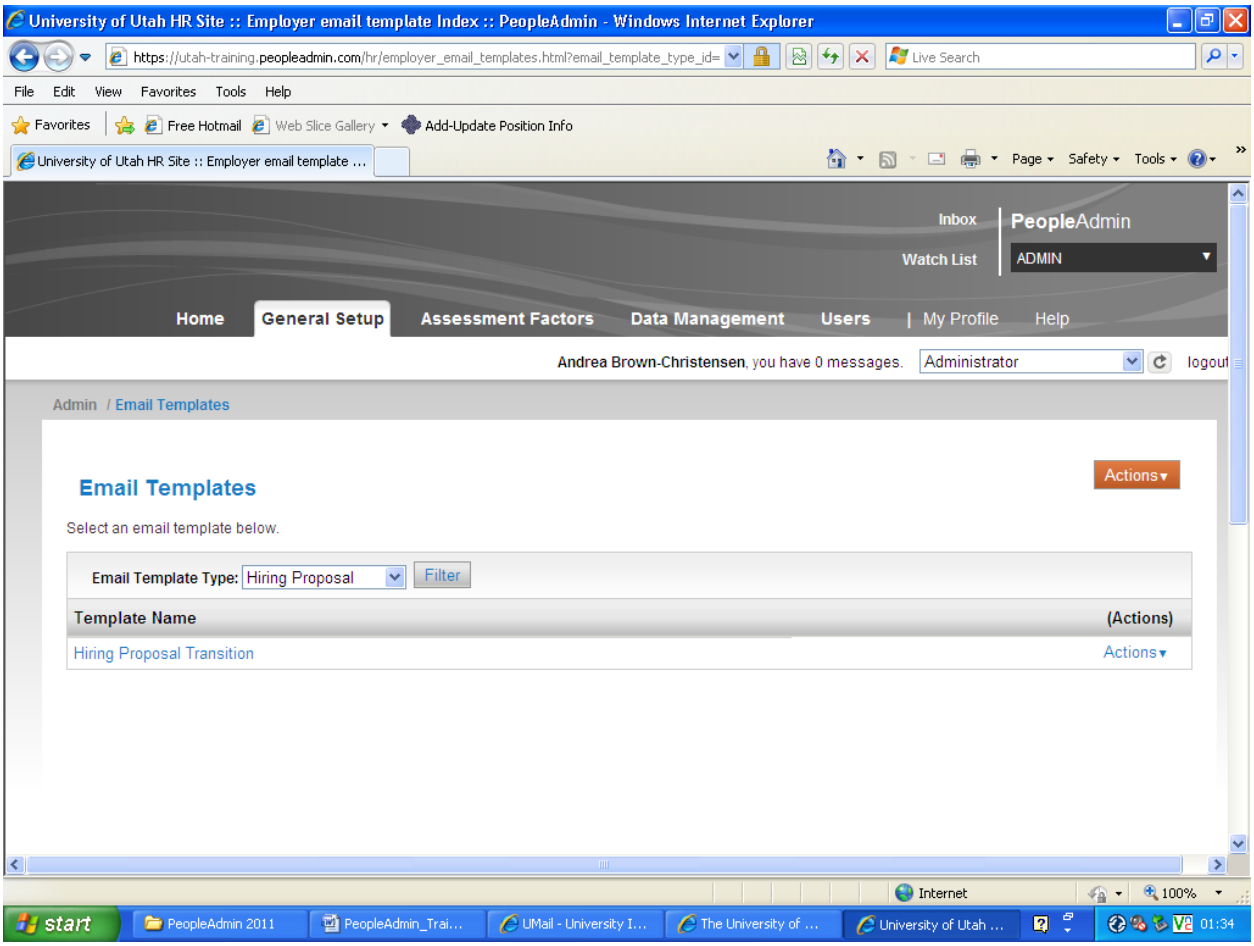
Appendix C: System Generated Emails

Workflow step #1: Job Posting



Application/applicant emails





Workflow step #4: Hiring Proposal