# PeopleAdmin Upgrade FAQs – Fall 2023

**This document provides information about:**

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## GENERAL QUESTIONS ABOUT THE UPGRADE:

**Q: What is different with the upgrade (October 2023)?**
**A:** The upgrade mainly impacted Hiring Proposals in PeopleAdmin. There are *four things* that changed:

- The application now has a new workflow state called "Conditional Offer." The hiring supervisor must make a conditional offer to their final candidate before proceeding with the next steps.
- When a candidate is selected for hire, and has accepted the conditional job offer, they will securely log back into PeopleAdmin to a "2nd step application" to provide their personal information (date of birth, SSN, etc.). This step removes the need for HR or the department to contact them to obtain the personal information directly (i.e., no more "New Hire Personal Information Form" - information from the candidate in PeopleAdmin will be integrated directly into the ePAF/PeopleSoft).
- When a Hiring Proposal is created, there is now the ability to request any needed background check, drug screen, and/or education verification directly from the Hiring Proposal. This step removes the need to submit these requests via your HR Analyst or HR's JIRA Background Check Request Form. The JIRA form is still available to request background checks for people who are not being hired through PeopleAdmin.
- The integration of information from PeopleAdmin to PeopleSoft for the purpose of the ePAF now occurs once per hour, instead of just twice per day.

For more information about the upgrade, and to watch a brief training video and review a comprehensive training guide, please go to:
https://www.hr.utah.edu/serviceTeams/PeopleAdminUpdate2023.php.

**Q: Is this new PeopleAdmin update also for Hospital Departments or only Campus Departments?**

**A:** PeopleAdmin is only used by University of Utah campus and UUHA departments – it is not used by the University Hospitals and Clinics.

**Q: Do the new changes impact postings and hiring proposals for faculty positions?**
**A:** Yes, these updates impact all position posting types:

- Benefited Staff
- Non-Benefited Staff
- Campus Faculty (Main Campus Faculty)
- Faculty (UUHA [University of Utah Health Academics] Faculty)

**Q: How many times per day does the integration between PeopleAdmin and PeopleSoft occur since the upgrade (October 2023)?**

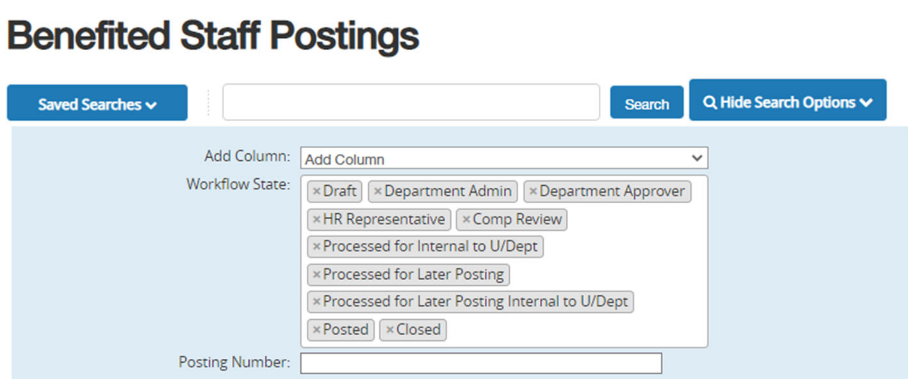
**A:** Every hour.

**Q: What is a "workflow state?" How does it work?**
**A:** "Workflow state" is the stage of a Position Requisition Form, an Application, or a Hiring Proposal. For example, an Application can be moved from "Under Review" to "On Campus Interview" or "Not Interviewed." A Hiring Proposal can be moved from "Draft" to "Move (move to Create Offer)" or "Move to HR Pre-Hire Checks."

**Q: What does "disposition" mean?**
**A:** An Application is "dispositioned" when it has been moved through all "workflow states" (stages) to it's final "workflow state" (stage.) Final workflow states for an Application may include "Withdrawn," "Not Interviewed/Not Selected," "Interviewed/Not Selected," or "Recommend for Hire."

**Q: To "clean up" old postings, how can I view a list of all my department's old postings?**

**A:** <u>For Staff positions:</u> To see a list of all old postings, log into PeopleAdmin in the role of Department Admin and search for all postings in the Workflow State of Draft, Department Admin, Department Approver, HR Representative, Comp Review, Processed for Internal to U/Dept, Processed for Later Posting, Processed for Later Posting Internal to U/Dept, Posted, and Closed. Finalize any hires. PeopleAdmin will deactivate any Benefitted Staff and Non-Benefitted Staff postings created more than six months ago. Email your [HR Contact]() if any posting older than six months needs to remain active.




**Q: Will there be any additional process upgrades coming in the future for staff or faculty hires?**

**A:** The University is planning a future upgrade where electronic offer letters will be generated in the system.

## APPLICATION:

**Q: Can we see if an applicant accepts another position before we mark that we will interview the candidate?**

**A:** There is no change to this process with the upgrade (October 2023) – you will make the decision about whether to interview an applicant based on their application and submitted documents, and the applicant can notify you if they accepted another position.

**Q: Are we able to see if an applicant withdraws from the posting?**

**A:** There is no change to this process with the upgrade (October 2023) **-** If the applicant logs into PeopleAdmin and selects the "withdraw" option by their application, then the system will move them to "inactive" and you will no longer see them as an "active" applicant to your posting.

**Q: What are the new workflow steps for hiring an employee?**
**A:** To view the detailed workflow steps for Staff positions, please review Appendices A and B in the training guide, which can be found here:
https://www.hr.utah.edu/serviceTeams/PeopleAdminUpdate2023.php

**Q: Does the department still need to move the candidates through the application workflow, or is it done automatically (after the successful candidate for hire is selected)?**
**A**: Yes, all candidates still need to be manually moved through the application workflow.

**Q: With the upgrade (October 2023), does the HR Department/HR analyst take all steps in the system to move an applicant towards hire (for example, move an application to "On Campus Interview," "Conditional Offer Issued," "Send to Collect Information," and "Submit (move to Recommend for Hire)."**

**A:** For departments who receive "Traditional" HR services, there is someone assigned the "Department Admin" role in PeopleAdmin, and they will take all needed actions on an application. For departments who pay for "Embedded" HR services, your assigned HR Analyst will complete all steps of the PeopleAdmin process for you. If you are not sure what HR services your department receives, please go here: https://www.hr.utah.edu/contact/search.php

**JOB OFFERS:**

**Q: What is the difference between a "Conditional Job Offer," a "Verbal Offer," and an "Offer Letter?"**

**A:**

- **Conditional Offer:** This can be verbal or written, and must have language that explains the conditions for hire. For example "This offer is contingent on satisfactory completion of pre-hire checks, which may include a criminal background check, a drug screening, and/or an education verification." For templates, please see here: https://www.hr.utah.edu/serviceTeams/openposition.php
- **Verbal Offer:** An initial conditional offer or final offer can be made verbally, as long as the final offer is in written form as an Offer Letter.
- **Offer Letter:** The document confirming the details of a hire. If the "conditions" (see above) are included, then the Offer Letter can serve both as the "Conditional" and "Final" offer. For templates, please see here: https://www.hr.utah.edu/serviceTeams/openposition.php

**Q: Is a conditional offer needed?**
**A**:

- For Staff positions: Yes, the final candidate needs to be made a conditional job offer, then personal information can be collected from the candidate.
- For Faculty and Campus Faculty: Conditional offers positions cannot be extended until AFTER the Hiring Proposal has been approved.

**Q: Where are the conditional offer letter templates available?**

**A:** See here: https://www.hr.utah.edu/serviceTeams/openposition.php

**Q: Is a signed offer letter required to initiate a hiring proposal on a staff posting?**
**A:** A Hiring Proposal can be created in the system after the candidate has accepted the conditional job offer and has provided the needed personal information. When the Hiring Proposal is created, the hiring supervisor will draft the Offer Letter. Offer Letter templates are available on the UHRM website here: https://www.hr.utah.edu/serviceTeams/job-offer-tools.php.

**Q: When will electronic offer letters be generated in the PeopleAdmin system?**
**A:** This functionality will be implemented in the future, but we do not yet have an estimated date for implementation.

## CANDIDATE 2ND STEP APPLICATION:

**Q: How does the final candidate get notified to log back into PeopleAdmin to provide their personal information on the 2nd step application?**
**A:**

- For Staff positions: Once the candidate accepts the conditional offer, their application will need to be moved to the workflow state of "Send to Collect Additional Information (move to Collect Additional Information)." Taking this action will trigger an email to be sent to the candidate which will instruct them to log 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.
- For Faculty and Campus Faculty positions: Once the candidate accepts the written offer and the Hiring Proposal is moved to the "Offer Accepted" status, an email will be sent to the candidate which will instruct them to log 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.
- When the candidate has updated and submitted their application with the additional information, the person in the "Department Admin" role for the posting/hiring proposal will receive an email informing them that the information has been received. You will notice that the Workflow State for the applicant will also be updated to **Additional Information Received**.

**Q: What instructions are provided to the candidate about the "2nd Step Application?"**
**A:** The email sent to the candidate from the system is basic, and provides them a link to log back into PeopleAdmin to complete the 2nd Step application. It looks like this:

**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.

If you wish to send additional information to the candidate about the process, email template can be found here: https://www.hr.utah.edu/serviceTeams/PeopleAdminUpdate2023.php

**Q: What information should I give the candidate about the "2nd Step Application?"**
**A:** Please ask the candidate to look for an email from Employment@noreply.utah.edu with the subject line of "Conditional Offer – Action Required," and to follow all instructions. To send your own email, see templates here: https://www.hr.utah.edu/serviceTeams/PeopleAdminUpdate2023.php

**Q: Where can I find email templates to use as a supplemental follow up to the candidate explaining the "2nd Step application?"**

**A:** See here: https://www.hr.utah.edu/serviceTeams/PeopleAdminUpdate2023.php

**Q: Is there a required time frame for the candidate to complete the "2nd Step" application?**

**A:** HR has not set a timeframe or deadline. When the Hiring Department provides the conditional job offer to the candidate, they are welcome to explain that the final hire cannot be completed without the information from the 2nd Step application.

**Q: When we make the conditional offer to the candidate, are we allowed to add a timeframe for them to complete the 2nd Step application?**

**A:** When the Hiring Department provides the conditional job offer to the candidate, they are welcome to explain that the final hire cannot be completed without the information from the 2nd Step application. We do not recommend rescinding a job offer based on a candidate completing the 2nd Step application later than the hiring department expected, as there may be unforeseen circumstances. Instead, we recommend that the hiring department contact the candidate again to remind them to complete it and ask if they need assistance.

**Q: What happens if the candidate does not complete the "2nd Step Application?"**

**A:** We recommend that you reach out to the candidate to remind them to complete it and ask what assistance they need. If they indicate they did not complete it because they are withdrawing from consideration, then HR can help you move their Hiring Proposal to the workflow state of "withdrawn."

**Q: What if the candidate doesn't have access to a device to complete the "2nd Step Application?"**
**A:** Speak to the hiring supervisor to see if the candidate can come into the department to use a computer in the department to complete this step, or contact your assigned HR Analyst to discuss options.

**Q: What if the candidate experiences technical challenges with the "2nd Step Application?"**
**A:** If a hiring department learns that a candidate is having technical difficulties, please contact your assigned HR Analyst who will assist.

**HIRING PROPOSALS:**

**Q: What changes are on the new Hiring Proposal (HP) form?**
**A:** The HP form for all position types now includes fields where the department will request any needed pre-hire checks, such as a background check, drug screen, and/or education verification. The Benefited Staff and Non-Benefited Staff Hiring Proposal form has four new optional workflow states:

- "Move (move to Create Offer)"
- "Transfer (move to Review Offer)"
- "Transfer (move to Extend Offer)"
- "Offer accepted (move to Offer Accepted)"

**Q: When should I use the four new workflow states on the Hiring Proposal and are they required?**
**A:** These were implemented in preparation for a future upgrade where the system will generate electronic offer letters. You are welcome to use those workflow states now, but they are optional until the next upgrade.

**Q: What if a Hiring Proposal was in-process at the time of the upgrade (October 2023)?**
**A:** Depending on the state the Hiring Proposal was in, it MAY require moving the Hiring Proposal back to the "Department Admin" step in order to fill out new fields.
For Hiring Proposals in the "Draft" and "Dept Admin" status, it will just require reviewing the Hiring Proposal and filling in any new required fields.

- For Hiring Proposals at the "Dept Approver" or "Dean/Org Head" for approval, the approver in those roles will need to move the Hiring Proposal back to "Dept Admin" in order to fill in the new required fields.
- For Faculty /Campus Faculty Hiring Proposals in "SVP/DFA," "Budget Approver," or "DFA" status, please work with your respective Office for Faculty to add information to any required fields that didn't exist prior to the upgrade.

**Q: What if a Hiring Proposal was in the "Ready for ePAF" status at the time of the upgrade (October 2023)?**
**A:** The changes associated with the PeopleAdmin upgrade will not impact Hiring Proposals in "Ready for ePAF" status. However, any required background checks, drug screens, or education verifications will need to be requested by your HR Analyst or through HR's JIRA form, since requesting through PeopleAdmin was not an option at the time the Hiring Proposal was created.

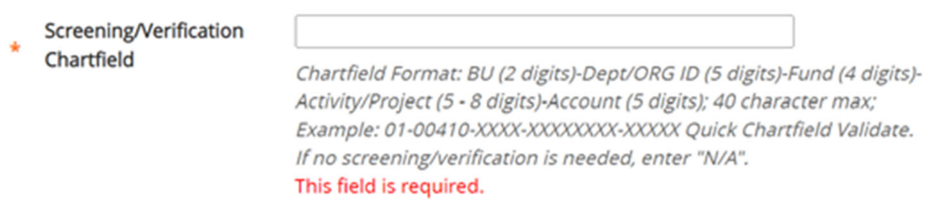
**Q: I see new workflow states on the Hiring Proposal called "Transfer." What are those used for?**
**A:** In PeopleAdmin, on the Hiring Proposal, "Transfer" means an applicant is being moved to a workflow state where they've received a job offer. This is different than the general HR term for when a current employee is "transferred" from one job to another job.

**Q: What is the 'Lateral Transfer Field' field on the Hiring Proposal and why is it included? Does it mean the same Job Code or same FTE?**

**A:** This question is asking if a department is hiring a person as a transfer from another department, into the same job code. The reason this question is asked is because policy states "A Receiving Unit that hires a Transfer Staff Member to a position that has the same job code as the Transfer Staff Member's current position may not increase the Transfer Staff Member's pay upon transfer unless approved by the Receiving Unit's cognizant vice president." See Policy 5-108 Transfer of Benefits Eligible Staff Members (non UUHC), here: https://regulations.utah.edu/human-resources/5-108.php

**PRE-HIRE CHECKS:**

**Q: What will be needed in order to request pre-hire checks in PeopleAdmin?**
**A:** Please provide the name and UID of the person making the request, select the package needed from the drop-down menu, and provide the chartfield in the correct format, like this:


* Screening/Verification Chartfield

*Chartfield Format: BU (2 digits)-Dept/ORG ID (5 digits)-Fund (4 digits)-Activity/Project (5 - 8 digits)-Account (5 digits); 40 character max; Example: 01-00410-XXXX-XXXXXXXX-XXXXX Quick Chartfield Validate. If no screening/verification is needed, enter "N/A".*
This field is required.

If you are hiring someone who does not need any pre-hire checks, select "Screening/Verification Not Needed" as the package and enter "NA" as the chartfield.

**Q: What if a position is not required to be posted in PeopleAdmin? How should the background check, drug screen, and/or education verification be requested?**
**A:** That will need to be requested by your HR Analyst or by using HR's JIRA Background Check Request Form for positions that aren't hired through PeopleAdmin (and for any positions that were in the final stages of the Hiring Proposal process prior to the upgrade).

**Q: In what situations do we need to complete an Education Verification?**
**A:** All faculty hires need an Education Verification. Staff positions that are at the Director level or above, or will be offered a salary of $100,000 or more, need an Education Verification.

**Q: How much does an Education Verification cost?**
**A:** Cost will vary based on how many degrees are verified (our vendor Certiphi charges $5 per degree) and fees charged by each college/university (which vary). The average range for the past two years has been between $18.56 and $32.14 per candidate.

**Q: How long does it take to complete an Education Verification?**
**A:** The average range was 2.11 days for FY22 and 2.13 days for FY23.

**Q: With the new process, how will the HR Analysts find previous background check clearance for a transfer employee instead of having the candidates complete a new background check?**

**A:** There is no change to this process – HR has access to records from our current and former per-hire check vendors.

**Q: Does the department need to provide a chartfield on the Hiring Proposal to pay for the background check, or will that field pre-populate the chartfield listed on the position requisition (posting) form?**
**A:** The department needs to provide the appropriate chartfield on the Hiring Proposal form.

**Q: Has the process where Certiphi sends an email to the candidate asking them to complete forms stayed the same?**

**A:** Yes, Certiphi's process to contact candidates has not changed with the upgrade (October 2023).

**Q: What happens if the Certiphi background check takes longer than expected?**

**A:** Please contact your assigned HR Analyst for assistance.

**Q: Is the clear-to-hire process changed for background checks now that it is possible to order background checks with the hiring proposal?**
**A:** The process for receiving the clear-to-hire is the same as before. The department will be contacted by their HR Analyst when the background check, drug screen, and/or education verification is completed and cleared.

**EMPLOYMENT ELIGIBILITY:**

**A: At what step in the process can we see if a new employee has a valid social security number?**

**Q:** When the Hire ePAF is initiated, HR Analysts or Department Admins in the hiring departments will be able to see if a social security number was provided by the new employee. To avoid delays with needed TWID's, it is recommended that at the time the conditional offer is issued, the HR Analyst or Department Admin also confirm if the candidate has a valid SSN.

**HIRE EPAF:**

**Q: What if the ePAF needs to be initiated today?**
**A:** Integrations are once per hour and the ePAF can be initiated the same day.

**Q: Will UNIDs be generated only at the time of creating the ePAF?**

**A:** Correct, the UNID process is the same.