

University of Idaho

PeopleAdmin Training Guide

Staff/Professional Applicant Tracking Module

Date: July 2018

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Introduction to Applicant Tracking

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

During this training document, we will cover:

1. How to create a new Staff/Professional job posting and secure the proper approvals to begin your recruitment.
2. How to review your applicants and their application materials.
3. How to request an interview for your qualified applicants and how to request follow-up interviews.
4. How to complete a Hiring Proposal and complete the hiring of your applicant.

There must be an approved action (job description and Position Authorization Form) through the Position Management module prior to beginning a Staff/Professional posting.

Applicant Tracking Module

Login Information:

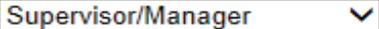
1. For employee users: Go to website address: <https://uidaho.peopleadmin.com/hr/login> and click on the SSO Authentication link. **Note:** You may be prompted to login using multi-factor authentication at this point.
2. You will login with your current network login information.



Applicant Tracking Module

Introduction & Home Page:

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

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

Module Type Definitions



Used to create or modify Position Descriptions, view Position Descriptions, and submit Position Actions.



Used to create and view Job Postings, view Applicants and application materials, complete Hiring Proposals, and navigate Onboarding.

Applicant Tracking Module

User Group Definitions for the Applicant Tracking Module

Supervisor/Manager – The Supervisor/Manager creates or edits the posting for employees in their department.

AAC – The Affirmative Action Coordinator (AAC) will approve all postings at the college/unit level and will ensure proper routing and approvals. They can also create/modify postings.

AAEEO – The Office of Human Resources – Workforce Diversity will review and approve posting materials and applicant demographics based on Equal Opportunity and Affirmative Action standards.

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

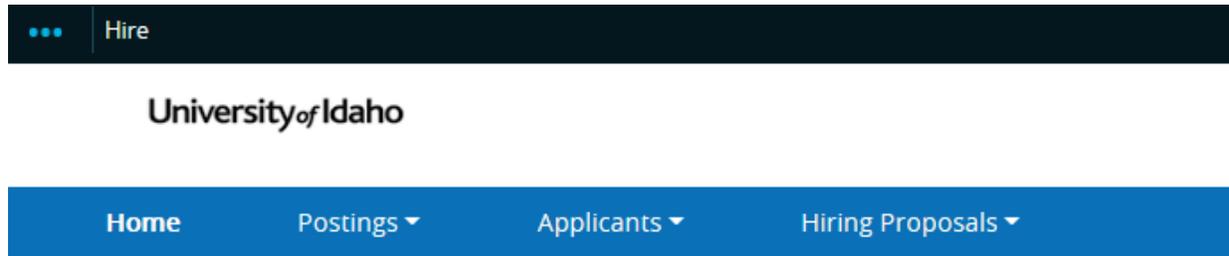
HRS – Human Resource Services (HRS) will review and approve all postings and hiring proposals at the university level.

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

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

Please note: Individuals may have only one user group or may be assigned to more, depending on their role within the approval process for actions.

Applicant Tracking Module



Core Functions of the Applicant Tracking Module:

- Generate and approve postings for recruitment
- Generate and approve hiring proposals
- View postings and applications

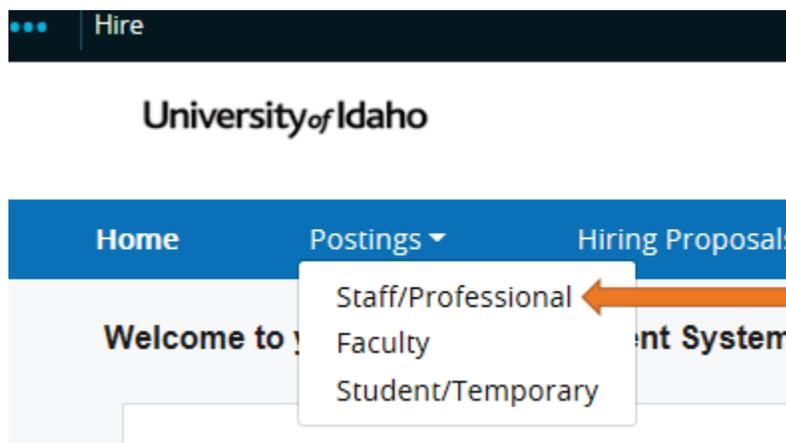
Creating New Postings

There must be an approved action (job description and Position Authorization Form) through the Position Management module prior to beginning a Staff/Professional posting.

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



2. Hover over 'Postings' and click **Staff/Professional**

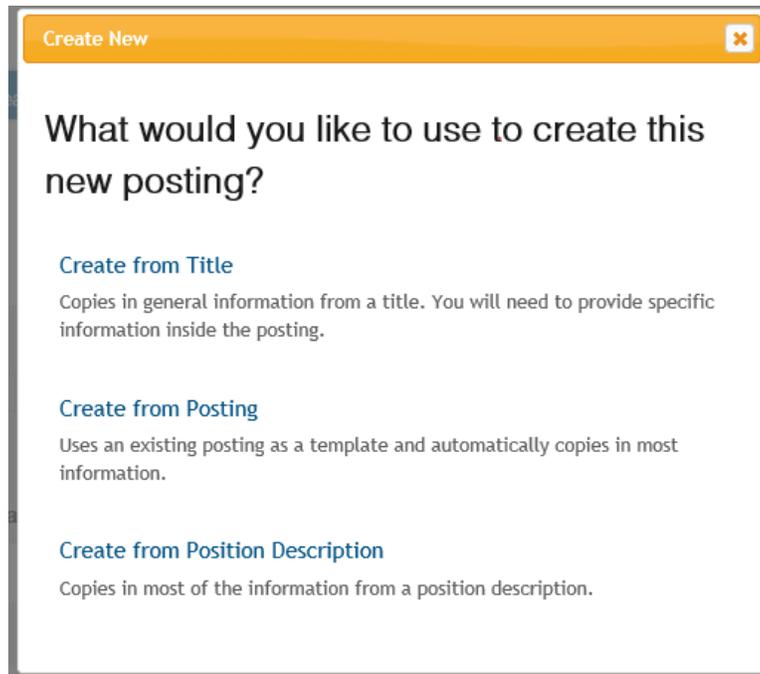


Applicant Tracking Module

3. In the upper right corner of the page, click the **Create New Posting** button

A red rectangular button with a white plus sign and the text "Create New Posting" in white.

4. A box will appear that will give three options:



- **Create from Title** – This option includes only the information that applies across the entire Position Type. A new Posting from a Position Type is almost completely blank. **Note:** This option is used only for Student/Temporary postings.
- **Create from Posting** – This option uses an existing posting as a template and automatically copies in most information. **Note:** This is used only for Student/Temporary postings or reposting a failed search.
- **Create From Position Description** – This option copies in most of the information from an approved position description. **Note:** Most Staff/Professional positions will be created from Position Description.

5. Select “Create from Position Description” to create a posting. You may enter a title or PCN into a search box or select from the list of approved position descriptions in

Applicant Tracking Module

your department. Once you have located your desired position description, click on the title hyperlink.

- This will take you to a summary of the chosen position.
- Select the  [Create Posting from this Position Description](#) button at the top right corner of the page to start your announcement.

Note: If you select the **Modify or Reactivate PCN**  [Modify or Reactivate PCN](#) button, your position will go through the Position Management process again for approval. **This not the option to choose to create the posting.** Be aware that the header will stay blue.

- The Position Title (Working Title) and Organizational Unit will default automatically from the Position Management module.
- The organizational units (executive level, mid-level and division/department will default in from the position description but can be changed if needed.
- The “Accept Online Applications” will be automatically selected. Do not change it.

Online Applications

Accept online applications?

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

Main Application

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

Applicant Tracking Module

Position Details

Most position details from the approved position description will default into the page. Each of the fields are either optional or required. Required fields will be indicated by a red asterisk and a red box.

Position Information

Position Title	HR Recruitment Resource Specialist
Position Control Number	6187
Suffix Number	00
Location	Moscow
Division/College	Human Resources
Department	Human Resource Services
FLSA Status	Overtime Eligible
Employee Category	Classified
* Pay Range	\$13.50 - \$16.65/hour
* Type of Appointment	Fiscal Year
* FTE	1
* Full Time/Part Time	Full Time
Funding	<input type="checkbox"/> This position is contingent upon the continuation of work and/or funding.

Note: The pay range will default in from the approved PAF. If you need to update the pay range, please put a note in the comments when you submit the posting for approval, and email hr-peopleadminhelp@uidaho.edu.

Applicant Tracking Module

POSITION RESPONSIBILITIES, RESPONSIBILITIES, & POSITION QUALIFICATIONS

All information will default from the approved position description and is not editable. If you would like to edit any of these fields, you will need to follow the “Modify Position Description” process in the Position Management module. If this the position is open to internal applicants please select: “This Search is Open to Current University of Idaho Employees Only.”

Position Responsibilities

Internal Posting?

This Search is Open to Current University of Idaho Employees Only

Check Box for Internal Posting

Position Summary

Under direction of the HR Director, the HR Recruitment Resource Specialist will be responsible for performing a variety of duties in support of Human Resource functions with special focus on the area of recruitment/hiring. Duties include reviewing procedures and explaining to staff and potential employees; responding to requests for information; reviewing, developing, and maintaining accurate records and correspondence; collecting, analyzing, and compiling information, assisting with federal and state regulations and university policy; assisting with meeting program goals, projects, and objectives; providing customer service; and performing related work contributing to team efforts.

Responsibilities

Make as complete a list of job duties as possible beginning with those, which take the greater percentage of the position's time. If supervising or training others, note the number and types/titles of positions, and whether it is direct or general.

Job Duty Function	Provide University resource support for recruitment: *
Job Duties/Responsibilities	<ul style="list-style-type: none">- Reviewing assigned job descriptions for completeness, clarity, and compliance with University policies/procedures.- Making recommendations when appropriate regarding job title and minimum qualifications for essential & marginal job functions.- Researching, collecting and providing current job descriptions and other position information on request.- Explaining, interpreting, and applying rules, policies, and procedures related to recruitment resources, recruitment processes.- Serve as the subject matter expert for the university applicant tracking system, troubleshooting and coordinate changes to the applicant tracking program, serve as a liaison between the University and the program vendor.- Assisting with applicant tracking coordination and university wide assistance.- Provide applicant tracking training to all new AAC's (Affirmative Action Coordinators)- Applicant tracking account access set-up and maintenance- Assist in the research of internal and external compensation data, position benchmarks, and compensation practices as needed.- Provide assistance to applicants and prospective employees in the recruitment process.
Percentage Of Time	40 *
Essential/Marginal	Essential *
Job Duty Function	Providing support and ensure compliance of hiring programs by: *
Job Duties/Responsibilities	<ul style="list-style-type: none">- Reviewing announcements in the applicant tracking system and related selection materials to ensure completeness and accuracy of data; assist in preparing announcements for posting.- Facilitating recruitment by posting vacancy announcements on websites and other appropriate venues.- Providing timely personal response to requests and inquiries regarding recruitment resources, applicant tracking and employment at the University of Idaho.- Reviewing employment related data in the HR Banner system as needed.- Maintaining compliance with Federal and State regulations and University policy.- Assisting with and recommending changes and enhancements to applicant tracking training systems.
Percentage Of Time	40 *
Essential/Marginal	Essential *
Job Duty Function	Provide General HR Support by: *
Job Duties/Responsibilities	<ul style="list-style-type: none">- Developing and preparing memos, letters, reports, presentations, and other documents.- Maintaining accurate and confidential files.- Respond to information requests in a timely manner via email, in-person, or telephone.- Assist in maintaining HR web page content.- Developing and maintaining professional networks and informational resources.- Assisting in the preparation of training materials and conducting training.- Cross training with and assisting HR team members.

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Position Qualifications

Educational: High School diploma or equivalent

Experience: At least two years of customer service experience

Some knowledge of: federal and/or state employment laws and regulations

Demonstrated ability to:

- compose a variety of business documents;
- gather and compile data;
- balance and coordinate workload for multiple projects.
- review documents for accuracy, completeness, and compliance with established standards, policies, and procedures

Ability to:

* Minimum Qualifications

- maintain accurate records
- maintain confidentiality of sensitive material
- pay close attention to detail while conducting repetitive tasks
- work well independently and in a team

Experience:

- interpreting, applying and explaining complex information such as regulations, policies or services;
- researching a variety of sources to identify and resolve problems or issues
- using a computer to enter and retrieve information
- working with diverse individuals from varying cultural and socio-economic backgrounds at all organizational levels

Possess:

- Strong interpersonal and organizational skills
- Strong verbal and written skills

Preferred Qualifications

- Bachelor's degree in Human Resources, Business, Communications, or other related field
- Knowledge of job analysis methods and/or job classification concepts
- Knowledge of recruiting, advertising concepts
- Demonstrated ability to establish and maintain effective working relationships
- Knowledge of higher education or state government personnel policies and procedures
- Experience conducting training and/or making public presentations
- Experience working with an applicant tracking system
- Experience with Banner

Physical Requirements & Working Conditions

Applicant Tracking Module

POSTING INFORMATION

Posting Information

* Search Coordinator	<input type="text" value="Select Some Options"/> <small>This field is required.</small>
Posting Number	<small>(Will be assigned upon first saving posting)</small>
* Action Number	<input type="text"/> <small>This field is required.</small>
* Posting Date	<input type="text"/> <small>This field is required.</small>
* Closing Date	<input type="text"/> <small>This entry cannot be blank unless 'Open Until Filled' is selected.</small>
* Open Until Filled	<input type="text" value="No"/>
Special Instructions to Applicants	<input type="text"/>

Search Coordinator – Type in the last name of the Search Coordinator you desire and a list will appear of designated Search Coordinators to select from. **Note:** Definition of Search Coordinator found on Page 5. If you cannot find someone in the search coordinator drop down, please email hr-peopleadminhelp@uidaho.edu.

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

*If you desire a posting to be posted in the future please put a note in the comments. When the posting reaches the Human Resources queue to post, any future posting dates are automatically changed to the date the position is posted.

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

- Two (2) weeks for Classified and Temporary Faculty positions.
- Four (4) weeks for Exempt and Faculty positions.
- Three (3) calendar days for Student/Temporary positions.

*For posting periods less than the aforementioned minimum posting requirements, a search exception must be granted from the Office of HR – Workforce Diversity. Please see page 17 for an information on the waiver process.

Applicant Tracking Module

Open until Filled – This field will default as “No”. If you would like to leave open until filled, indicate “Yes” and designate a first consideration date for applicants in the “Special Instructions to Applicant” field. If you do not designate a first consideration date, the posting will be sent back to you.

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

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

Quicklink for Posting – The link to the posting from the applicant view of the webpage. You can use this link to send to internal/invite only applicants.

ADVERTISING

Advertising

Advertising Venues

<input checked="" type="checkbox"/> Moscow Pullman Daily News
<input checked="" type="checkbox"/> Lewiston Tribune
<input type="checkbox"/> The Idaho Statesman
<input checked="" type="checkbox"/> The Spokesman Review
<input type="checkbox"/> The Times- News
<input type="checkbox"/> The Post Register
<input type="checkbox"/> Coeur d'Alene Press
<input checked="" type="checkbox"/> Idaho Department of Labor (idahoworks.gov - auto-enabled for classified, exempt and faculty postings)
<input checked="" type="checkbox"/> Higher Ed Jobs (higherjobs.com - auto-enabled for classified, exempt and faculty postings)
<input type="checkbox"/> Indeed (indeed.com - auto-enabled for classified positions)
<input checked="" type="checkbox"/> Association of Public and Land Grant Universities (aplu.org - auto enabled for classified, exempt and faculty postings)
<input checked="" type="checkbox"/> Academic Keys (academickeys.com - auto enabled for classified, exempt, and faculty postings)
<input type="checkbox"/> Craigslist (craigslist.com) (Charges may apply)
<input type="checkbox"/> Seattle Times Online (nwjobs.com)
<input type="checkbox"/> The Oregonian Online
<input type="checkbox"/> Diverse Education
<input type="checkbox"/> Affirmative Action
<input type="checkbox"/> Science
<input checked="" type="checkbox"/> The Chronicle of Higher Education (chronicle.com) (auto-enabled for exempt and faculty positions)

Additional Advertising Venues

Advertising Dates

(please provide dates for print ads)

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Special Advertising Text

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

Additional Advertising Notes

Advertising Budget Number(s)

Advertising Venues – Certain advertising venues are auto-enabled based on position types. Required advertising for exempt and faculty postings is auto-enabled. Classified postings require additional newspaper advertising, arranged through Job Elephant. You are encouraged to consider additional advertising specifically targeted for your position. Please visit the Equal Employment Opportunity/Affirmative Action website for more information on advertising requirements: <http://www.uidaho.edu/human-resources/equal-employment-opportunity-affirmative-action>.

Type of Hire	Duration	Minimum Advertising Venues
Faculty Postings	4 Weeks	<p>UI Auto-Enabled Advertising: The Chronicle of Higher Education, Higher Ed Jobs, Academic Keys, Association of Public and Land Grant Universities, Idaho Department of Labor</p> <p>Note: Under UI hiring guidelines, there is no advertising requirement for temporary faculty/lecturers hired.</p>
Staff Postings	4 Weeks	<p>Exempt Positions</p> <p>UI Auto-Enabled Advertising: The Chronicle of Higher Education, Higher Ed Jobs, Academic Keys, Association of Public and Land Grant Universities, Idaho Department of Labor</p>
	2 Weeks	<p>Classified (Non-exempt) Positions</p> <p>UI Auto-Enabled Advertising: Higher Ed Jobs, Academic Keys, Association of Public and Land Grant Universities, Idaho Department of Labor, Indeed.com</p> <p>Departmental Responsibility: Add 1 local paper for two weekends or 2 local papers on alternating weekends (order through Job Elephant)</p>
UI Internal Hires	2 Weeks	Department to Post in UI Daily Register – also use internal emails, departmental memos, and bulletin boards as appropriate
Postdoctoral Fellows		Note: There is no advertising requirement for Postdoctoral Fellows hired under UI hiring guidelines
<p>For all ads placed in subscription ads, Job Elephant will add: The University of Idaho is an equal opportunity employer and does not discriminate against any employee or applicant for employment because of race, color, religion, sex, national origin, age, disability, sexual orientation, gender identity/expression or any other reason prohibited under Federal, State, or local laws. EOE AA/M/F/D/V For print ads, Jobelephant will add at minimum: EOE AA/M/F/D/V</p>		

Applicant Tracking Module

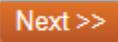
Additional Advertising Venues – If you have additional advertising venues in which you would like to advertise, indicate here. If you plan on submitting your own advertising and not use JobElephant for a particular venue, please also indicate here. **Note:** Listservs must be initiated at the department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

Advertising Dates – Provide dates that you would like certain print ads to run.

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

Additional Advertising Notes – If you have any additional information to share regarding your advertising, please input it here.

Advertising Budget Number – Please insert your budget number here. This is a required field. This can be different than the budget used for the background check.

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

Waiver/Exception

Waiver

Search Waiver Request

Search Waiver Request
Comments

Search Waiver AAEEEO
Comments

Search Waiver Approval

Search Exception
Request

Search Exception
Request Comments

Search Exception
Approval

Search Waiver or Exception Request and Comments - If you will be requesting a search waiver (a request to appoint an individual to a position without conducting a search) or an exception (a request to change one or all of the requirements for conducting a search) select "Yes" where appropriate and enter the justification in the Search Waiver Request Comments or the Search Exception Request Comments. Additional documentation can be added as an attachment in the Position Documents section.

Note: Search waivers are generally approved on the Position Management side, with the action approval process. However, there is sometimes a need to put through the waiver on the applicant tracking side. Search exception request and approval will always take place on the applicant tracking side when creating a posting.

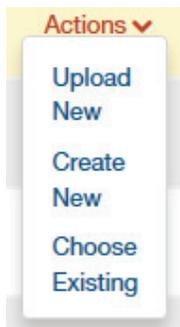
Applicant Tracking Module

Posting Documents

Posting Documents				Save	<< Prev	Next >>
Document Type	Name	Status	(Actions)			
Telephone Interview Questions			Actions ▾			
1st Interview Questions			Actions ▾			
Preliminary Screening Form			Actions ▾			
Intermediate Screening Form			Actions ▾			
Additional Posting Document 1			Actions ▾			
Additional Posting Document 2			Actions ▾			
Additional Posting Document 3			Actions ▾			
2nd Interview Questions			Actions ▾			
3rd Interview Questions			Actions ▾			

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

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



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Upload New

Name

Description

File to upload

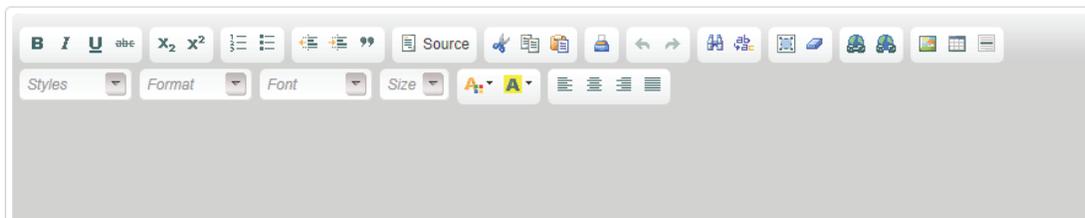
If you already have interview questions created and want to upload them, under *Actions* click *Upload New*. Once in the form, add a description of the document and click the “Browse...” button. A pop-up window will appear with your computer folders and files; select your document with your interview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

Create New

Create a New Interview Questions (required)

Name

Description



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

Choose Existing

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

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

Applicant Tracking Module

Applicant Documents

Applicant Documents					Save	<< Prev	Next >>
Order	Name	Not Used	Optional	Required			
<input type="text" value="1"/>	Resume/CV	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>			
<input type="text" value="2"/>	Cover Letter/Letter of Application	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>			
<input type="text" value="3"/>	List of References	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>			
<input type="text" value="4"/>	Research/Teaching Philosophy	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>			
<input type="text" value="5"/>	Transcripts	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>			
<input type="text" value="6"/>	Reference Letter 1	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>			
<input type="text" value="7"/>	Reference Letter 2	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>			
<input type="text" value="8"/>	Reference Letter 3	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>			
<input type="text" value="9"/>	Other Document 1	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>			
<input type="text" value="10"/>	Other Document 2	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>			
<input type="text" value="11"/>	Other Document 3	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>			
<input type="text" value="12"/>	Letter of Qualification	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>			
<input type="text" value="13"/>	LinkedIn Profile URL (DO NOT USE)	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>			
<input type="text" value="14"/>	Other Document 4	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>			
<input type="text" value="15"/>	Other Document 5	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>			

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

Supplemental Questions

Supplemental questions can be added here. Click on the **Add a question** button .

Add a question

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

Add	Category	Question
<input type="checkbox"/>	Education	What is your highest level of completed education?

Choosing Existing Question by Category:

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

Add a New One:

If you do not see an existing question that you would like to ask, you will need to click the “Add a New One”, and a separate pop-up box will appear. First, enter the name for the question. Under category, select the college or unit the position is in. Add the question in the text box, and then select whether it is an open ended question or should have a predefined answer. Open ended questions will allow the applicant to add a free form answer to your question. For predefined answers, add the possible answers. New answer fields will automatically appear as needed. After all of your possible answers are entered, click **Submit**.

Displaying 1 - 15 of 1870 in total
← Previous | Next →

Can't find the one you want? [Add a new one](#)

Submit **Cancel**

Applicant Tracking Module

The screenshot shows a web form titled "Add a Question" with a close button in the top right corner. Below the title is a note: "Questions defined here will be 'pending' approval and will not be available for use in other areas of the system until they have been approved." The form contains three main input fields: "Name" with a text box, "Category" with a dropdown menu showing "Please select a category", and "Question" with a larger text area. Below these fields is a section titled "Possible Answers" with two radio button options: "Open Ended Answers" (which is selected) and "Predefined Answers". At the bottom right of the form are "Submit" and "Cancel" buttons.

“After you add your questions, they will appear as a list on the page. You can change the order of the questions by either a) changing the number in the “Position” column and pressing the **Save**  button, or b) click and hold on the question and drag it to the order you prefer. If you would like to make a question required for an application, you will need to select the checkbox in the “Required” column. You can remove the question by clicking on the gray “X” button on the far right of the question.

If you chose a question with predefined answers, click on the question to reveal the predefined answers for this question. Here you can give points to certain answers and/or make an answer disqualifying. Selecting an answer as disqualifying can automatically disqualify an applicant if they select one of those answers. *If you would like to use this feature, please work with your AAC or Human Resources to ensure that you are correctly utilizing it.

Applicant Tracking Module

Guest User

The Guest User feature is intended for those individuals who are not a staff or faculty member of the University of Idaho, but will be serving on a committee for a specific search. You will usually use this feature if you have an outside community member or UI student on your search committee. A guest user will be able to view the applicants and application materials for the search they are given access to. They will not have the ability to make any actions on applicants.

To add a Guest User, select *Create Guest User*. Username and password fields will appear with a username and password already assigned. If you would like to change the password, update the information in the "Password" field and select the "Update Password" button. Enter the email address of the guest user(s) and the username and password will be automatically sent to them. All guest users that are assigned will have the same username and password to access the specific posting.

Guest User

Want to give guests access to view this posting?

Create Guest User Account

Guest User Credentials

Guest users may view this posting by using these credentials.

Username

gu72391

Password

GPK7M6

Update Password

Email Addresses of Guest User Recipients

Email addresses (one per line)

Update Guest User Recipient List

Applicant Tracking Module

Search Committee Members

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

Search Committee Members

No Search Committee Members have been assigned to this Posting yet.

[Add Existing User](#)

[Create New User Account](#)

Adding an existing user:

To add search committee members, you may search for someone in the database by clicking on "Add Existing User." You can enter their name in the text box that appears in the pop-up window. Once you see the employee you would like to add to the search committee, click on the **Add Member** [Add Member](#) button. If the employee will also serve as the Committee Chair, you can select the checkbox next to the **Add Member** button.

Search:

Department:

Display search committee user group members only

[Search](#)

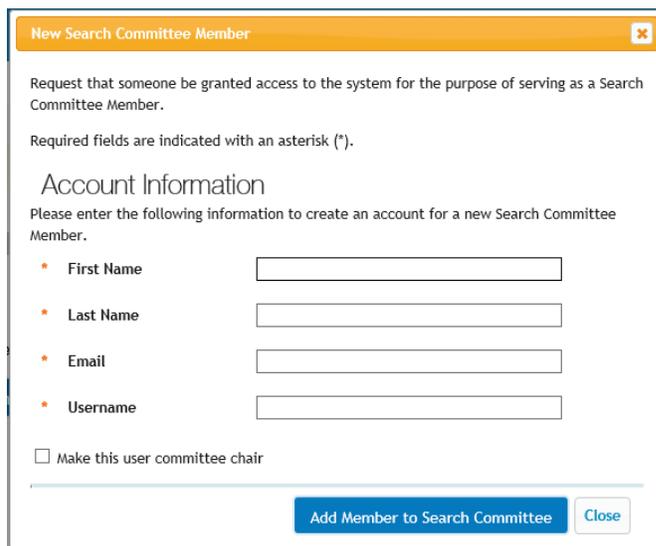
Email	Department	Committee Chair	(Actions)
emailaddress@zed.zed	University of Idaho	<input type="checkbox"/>	Add Member
emailaddress@zed.zed	University of Idaho	<input type="checkbox"/>	Add Member
emailaddress@zed.zed	University of Idaho	<input type="checkbox"/>	Add Member
emailaddress@zed.zed	University of Idaho	<input type="checkbox"/>	Add Member
emailaddress@zed.zed	University of Idaho	<input type="checkbox"/>	Add Member

Applicant Tracking Module

Requesting an account for a new user:

If you are unable to find your needed search committee member, you can create an account for a new search committee member. This will normally be used for your long-term TH employees. To create the new search committee member account, click on the “Create New User Account” button. Then, fill in the fields for the employee’s first and last name, email, and assigning them a username.

Note: Please do not request PeopleAdmin accounts for students or for committee members outside of the university. They should be added to the search as guest users. See page 23.



The screenshot shows a web form titled "New Search Committee Member" with a close button in the top right corner. The form contains the following text and fields:

- Request that someone be granted access to the system for the purpose of serving as a Search Committee Member.
- Required fields are indicated with an asterisk (*).
- Account Information**
Please enter the following information to create an account for a new Search Committee Member.
- Four required fields, each with an asterisk and a text input box:
 - * First Name
 - * Last Name
 - * Email
 - * Username
- A checkbox labeled "Make this user committee chair".
- At the bottom, there are two buttons: "Add Member to Search Committee" (in blue) and "Close" (in white).

Evaluative Criteria

We are not currently using this feature.

Summary

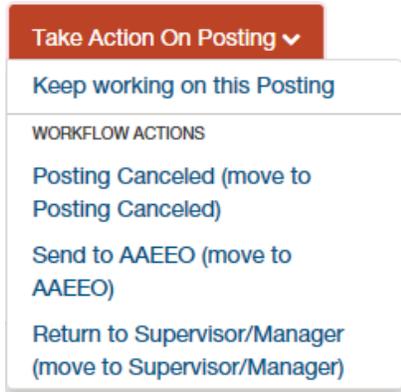
Review the sections of the posting under the Summary tab. This is an opportunity to edit the position. If all the sections are completed correctly, each one will be accompanied by a green check mark. 

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

Applicant Tracking Module

Take Action on Posting

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



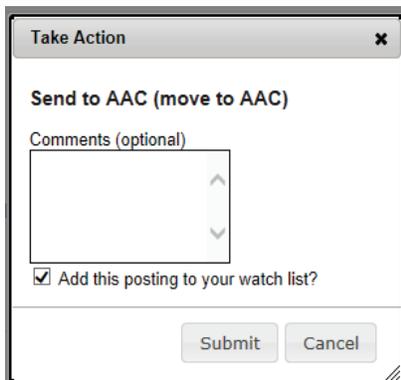
**Please note, to save this request and submit later, please select ‘Keep working on this Posting’. This will also save this posting to your watch list. If there are additional approvers within the department, you will need to select appropriate action per the workflow.*

You will receive a pop-up window to add any optional comments you wish to share.

Note: These notes are discoverable and will be seen by all approvers in the process.

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

Click on **Submit**.



Applicant Tracking Module

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

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

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

Take Action On Posting ▾

★ See how Posting looks to Applicant

 Print Preview (Applicant View)

 Print Preview

Posting Actions

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

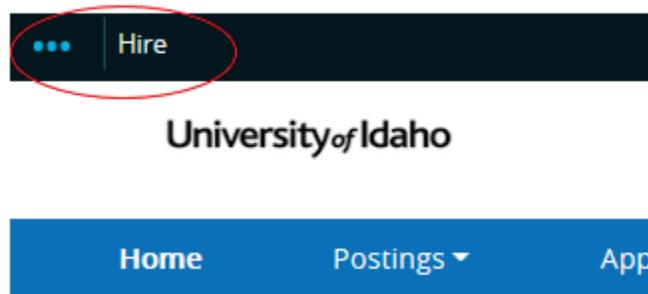
Internal/Invite Only Postings

Internal Posting: In order to conduct a search that is internal to University of Idaho employees only, you must first be approved for a search exception from AAEEEO. If the exception is granted, your posting will still be posted to the public site, but with the box checked stating that it is open to University of Idaho Employees Only.

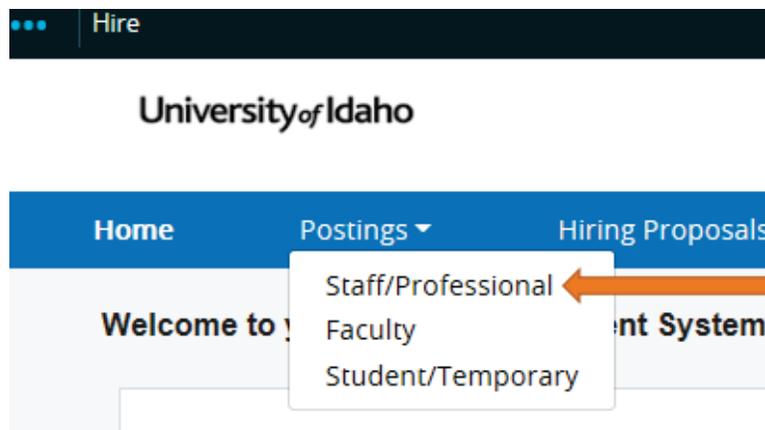
Invite-Only/Waiver Posting: This type of posting would only be needed to hire an external candidate, with an approved waiver from the Office of Human Resources – Workforce Diversity (AAEEEO). You can input the waiver request in the Position Management module during the PAF process, at which time it will visit the AAEEEO stop for review. If the waiver is granted, your posting will not be posted to the public site. Instead, you will be given a link that you will e-mail to your applicant and they will apply directly to the position.

View Job Postings and Applicants:

1. Verify you are in the 'Applicant Tracking' module and authorized to access, create and/or view a posting (Supervisor/Manager, AAC or Search Coordinator).



2. Hover over 'Postings' and click **Staff/Professional**.



3. You can locate your posting by either a) locating your search in the "Staff/Professional Postings" list and select on the Position Title hyperlink, or b) entering a position name, posting number or PCN in the Search field and click Search.
4. Once you select the posting, you will have a number of options.



Summary – You will see the posting information.

Applicant Tracking Module

History – You will see the history of all actions taken in this search. This information includes who made the action and at what time and date.

Applicants – You can view the applicants for this position and view their materials.

Reports – You can run reports based on the information provided by the applicants.

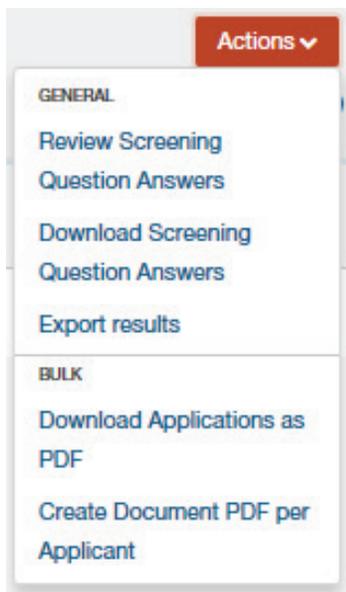
Hiring Proposals – You can view who has been offered this position during this search.

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

Reviewing Applicants and Application Materials

After selecting your posting, click on the “Applicants” link. The applicants will be listed at the bottom of the page under Staff/Professional Job Applications. Here you will see their first and last name, date of application, where they are located in the workflow, and the application documents submitted. To view each application individually, you can click on the applicant’s last name.

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



Applicant Tracking Module

GENERAL

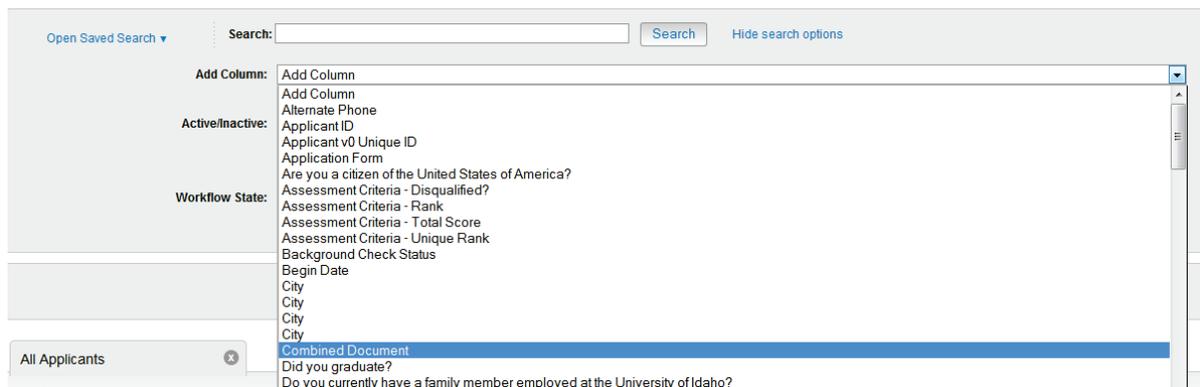
Review Screening Question Answers: You have the ability to review the answers to the supplemental questions from all applicants. You can identify which applicants answered a specific way by selecting on the hyperlink of the answer.

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

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

BULK

Download Applications as PDF: You have the ability to export all application materials including attached documents from all applicants into one PDF file.



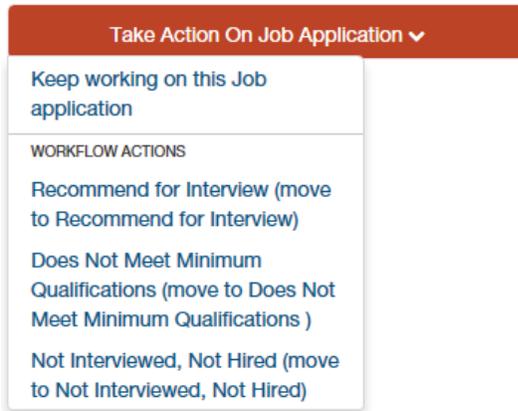
Create Document PDF per Applicant: You have the ability to export all application materials including attached documents for each individual applicant into individual PDF files. To view the individual PDF you will need to ensure you have included the “Combined Document” column header to your search.

Take Action On Job Application:

In order to request an interview of an applicant for your position, you must have search coordinator access for the designated search. If you are not the search coordinator, you can

Applicant Tracking Module

either skip this section or contact your AAC to request access. **Note:** Please be aware that actions are based on individual applicants and not the entire pool of applicants.



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

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

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

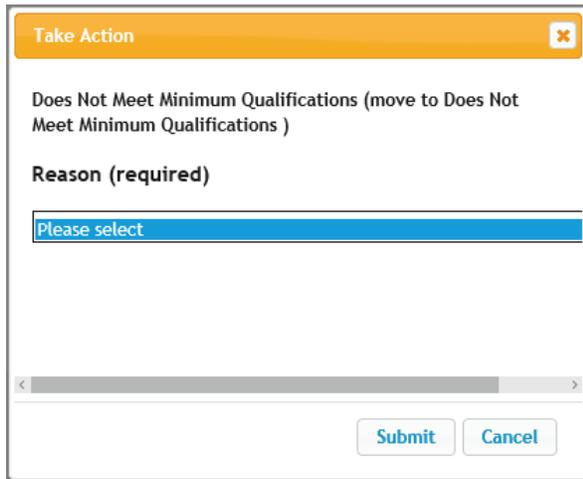
Does Not Meet Minimum Qualifications: After reviewing the applicant's application material, you determine that they do not meet one of the Minimum Qualifications of the position. **Note:** If you choose this option an automatic email will be sent to the applicant when the position has been transition to a "Filled" status.

Not Interviewed, Not Hired: After reviewing the applicant's application material, you determine that they meet the minimum qualifications of the position but do not possess the necessary qualifications to proceed with an interview. **Note:** If you choose this option an automatic email will be sent to the applicant when the position has been transition to a "Filled" status.

*Candidates not moving forward for an interview but still under consideration by the committee should be kept in the current process stage and not moved. This is similar to being kept on "Reserve." Once a successful candidate has been identified remaining candidates should be transitioned appropriately to a final disposition.

Applicant Tracking Module

Does Not Meet Minimum Qualifications:

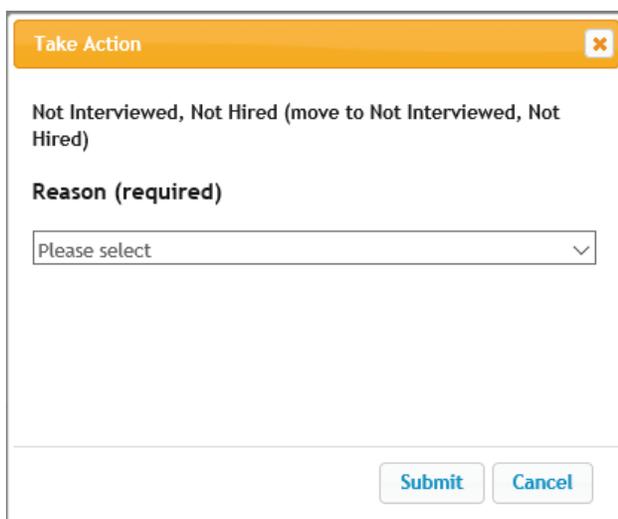


The screenshot shows a 'Take Action' dialog box with an orange header and a close button. The main text reads 'Does Not Meet Minimum Qualifications (move to Does Not Meet Minimum Qualifications)'. Below this is a label 'Reason (required)' followed by a text input field containing 'Please select'. At the bottom are 'Submit' and 'Cancel' buttons.

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

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

Not Interviewed, Not Hired:



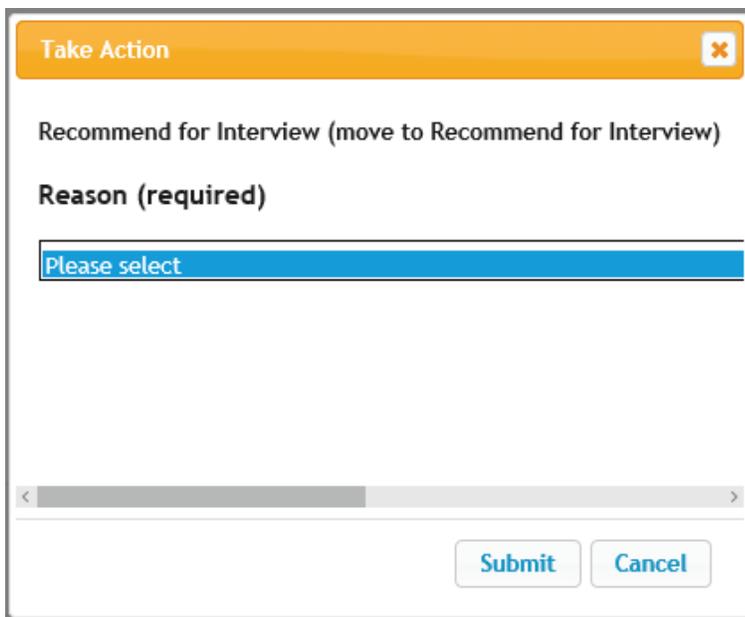
The screenshot shows a 'Take Action' dialog box with an orange header and a close button. The main text reads 'Not Interviewed, Not Hired (move to Not Interviewed, Not Hired)'. Below this is a label 'Reason (required)' followed by a dropdown menu containing 'Please select'. At the bottom are 'Submit' and 'Cancel' buttons.

Applicant Tracking Module

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

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

Recommend for Interview:



The screenshot shows a pop-up window titled "Take Action" with a close button (X) in the top right corner. The main text inside the window reads "Recommend for Interview (move to Recommend for Interview)". Below this, there is a label "Reason (required)" followed by a blue dropdown menu that currently displays "Please select". At the bottom of the window, there are two buttons: "Submit" and "Cancel".

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

Requesting Additional Interviews:

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

Applicant Tracking Module

After interviewing your applicant, if you wish to conduct an additional interview, you do not need additional approval in the system. However, please transition the applicant to the next appropriate stop so that the number of interviews can be documented. From “Approved for Interview” you can select “Move to Second Interview” and then subsequently “Move to Third Interview.”

HIRING PROPOSAL

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

Recommend for Hire:

After conducting your interviews and determining which applicant you would like to extend an offer to, you will move the candidate to “Recommend for Hire” within the application. This will allow a hiring proposal to be started by the AAC or supervisor/manager.

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

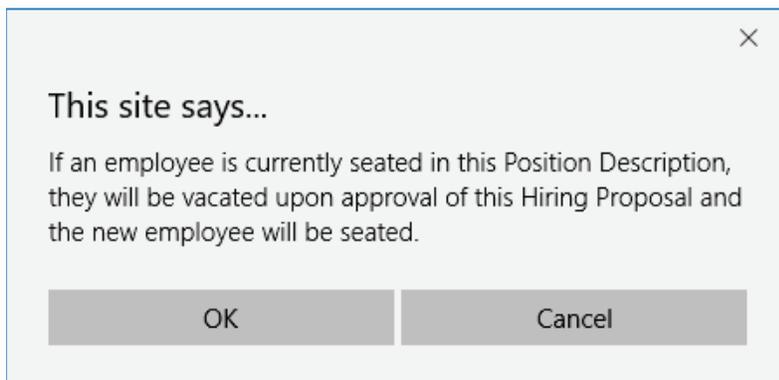
Starting and Editing Hiring Proposal:

1. The AAC or supervisor/manager will initiate the Hiring Proposal by selecting the **Start Hiring Proposal**  [Start Hiring Proposal](#) link on the successful candidate’s application.
2. A list of positions within the University will appear on the next page. Your posting with will be automatically selected with the radio button. Select the “Select Position Description” button.



***If you are hiring multiple individuals from one posting, you would need to search for the appropriate position description by title, PCN, or browse the list, as it would default in the position description that created the posting.**

When you click on the Position Description, a disclaimer box will appear:



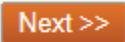
Applicant Tracking Module

This is explaining that if an employee is currently seated in the position description, they will be removed and the newly hired employee will be seated upon the hiring proposal being completed. You can click “OK.”

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

The screenshot shows a vertical navigation menu titled "Editing Hiring Proposal". The menu items are: "Hiring Proposal" (highlighted with a green arrow), "Funding" (with a green checkmark), "Hiring Information", "Supervisor" (with a green checkmark), "Hiring Proposal Documents" (with a green checkmark), "Background Check", and "Hiring Proposal Summary".

Hiring Proposal

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

Funding

Funding

Funding Type	Permanent
Budget/Index	RAX028
Percentage	100
Activity Code	
Account Code	E4105
Proposed NBAPBUD Salary	\$29,515.20

Remove Entry?

[Add Funding Entry](#)

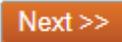
Position Control Information

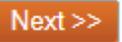
Grand Total Proposed NBAPBUD Salary (all funding sources)	\$29,515.20
---	-------------

Funding Comments

Position Control Comments

Applicant Tracking Module

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

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

Hiring Information

Candidate Information

* Education	<input type="text"/>
	<small>This field is required.</small>
* Prior Experience	<input type="text"/>
	<small>This field is required.</small>
Target Salary	<input type="text"/>
Comments	<input type="text"/>

Candidate Information documents the education and experience for the candidate, as well as the target salary information.

Education: Indicate the highest degree the candidate has attained. It should only include **completed** degrees from the following list: High School Diploma, Associates, Bachelors, Masters, and Doctorate.

Experience: Provide (in months) the candidate's past experience that is substantially similar to and at the same level of the position they are being hired for.

Target Salary: HRS will calculate the target salary for the candidate based on their education and experience.

Applicant Tracking Module

Hiring Information

* Proposed Start Date
This field is required.

Contract End Date

Requested Salary
Offers over the target salary for the candidate will need to be routed to and approved by the Executive Approver.

Justification For Requested Salary

Offered Amount
Offer amount approved by the Executive Approver.

Executive Approver Comments

Offer Negotiation

Negotiated Salary

Negotiation Comments

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

Proposed Start Date: Using the calendar feature in the field, select what you determine the proposed start date might be. This field is for an approximation and not an exact date. If this date changes upon discussions with the candidate and the hiring unit, a new hiring proposal does not need to be generated. This is a required field.

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

Requested Salary: Indicate the initial salary offer to the candidate. This may not be the final agreed salary. The AAC can refer to the target salary provided by HRS to adjust this amount, if need be, when the hiring proposal reaches the AAC Routing queue. If the requested salary is over the target salary for the candidate, the hiring proposal should

Applicant Tracking Module

be routed to the Executive Approver stop, or, executive approval should be uploaded in the documents section. This is a required field.

Justification for Requested Salary: If you plan on offering more than the target salary for the candidate, you will add your justification for offering above that amount here. If you do not plan on offering over the target salary for the candidate, justification is not needed. Please check with your AAC for department-specific approvals.

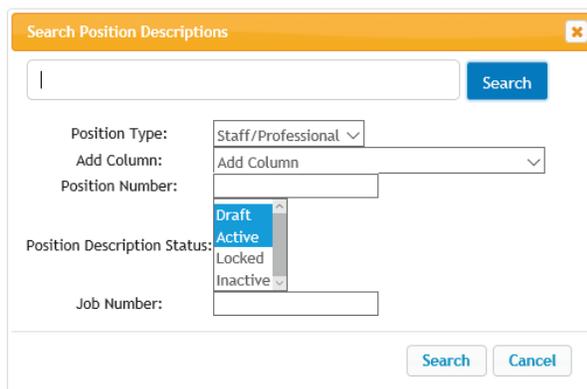
Approved Salary and Executive Approver Comments: These fields are editable only by the Executive Approver (or their designee). They will put in the approved salary amount.

Negotiated Salary: If the salary after negotiations with the candidate is different than what was originally requested, you can indicate the salary amount here. This field will be completed by the AAC. **Note:** If the negotiated salary is over the target salary for the candidate, further approval is required from the Executive Approver.

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

Supervisor

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



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

Applicant Tracking Module

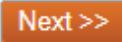
Hiring Proposal Documents

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

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

Upload additional documents as required for this position.

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

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

Applicant Tracking Module

Background Check:

Background Check

* Background Check Budget Number	<input type="text"/>
	This field is required.
Background Check Submitted	
Results	
Date Background Check Completed	
Notes	

Please provide the budget number to charge the background check to. Human Resources will complete the rest of the fields.

Hiring Proposal Summary

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

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

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

Final Approvals

1. If the Supervisor/Manager initiates the Hiring Proposal, the Hiring Proposal will then go to AAC Initial Review. The AAC will then move it to New Hire Salary Determination so HRS can compute the candidate's target salary.



2. After HRS has computed the candidate's target salary, the hiring proposal will be moved to AAC Routing for further review, and to finalize the requested salary amount.
3. From AAC Routing, the AAC has a few options:

AAEEO – Once you receive all of the necessary approvals, you can move the Hiring Proposal forward to AAEEO for their approval.

Approver – If there are any individuals within the University who need to approve the hiring of the candidate, then choose this option. A pop-up window will appear with a drop-down box with all employees who have Approver access. Select one of these individuals and the Hiring Proposal will be sent to them for their approval.

Executive Approver – If you are planning on extending an initial offer over the target rate for the candidate, you must send the Hiring Proposal to the Executive Approver 1 to receive their approval.

Return to AAC Initial Review – The hiring proposal can also be returned to AAC Initial Review if changes need to be made and sent back through to New Hire Salary Determination.

Applicant Tracking Module

4. AAEEEO will move the hiring proposal forward to HRS so the contingent offer amount can be approved.
5. After HRS approves the hiring proposal for contingent offer, it will go back to the AAC and the department can make an offer to the candidate contingent on a background check.
 - a. If during salary negotiations the amount goes above the target salary for the candidate the AAC can send the hiring proposal with the negotiated offer amount to Executive Approver 2. If the negotiated offer does not go above the target salary for the candidate, internal approvals may be needed but the hiring proposal does not need further HRS or executive approval.
6. After the contingent offer has been accepted, the AAC will send the hiring proposal to the HRS Background Check stop so the background check will initiated.

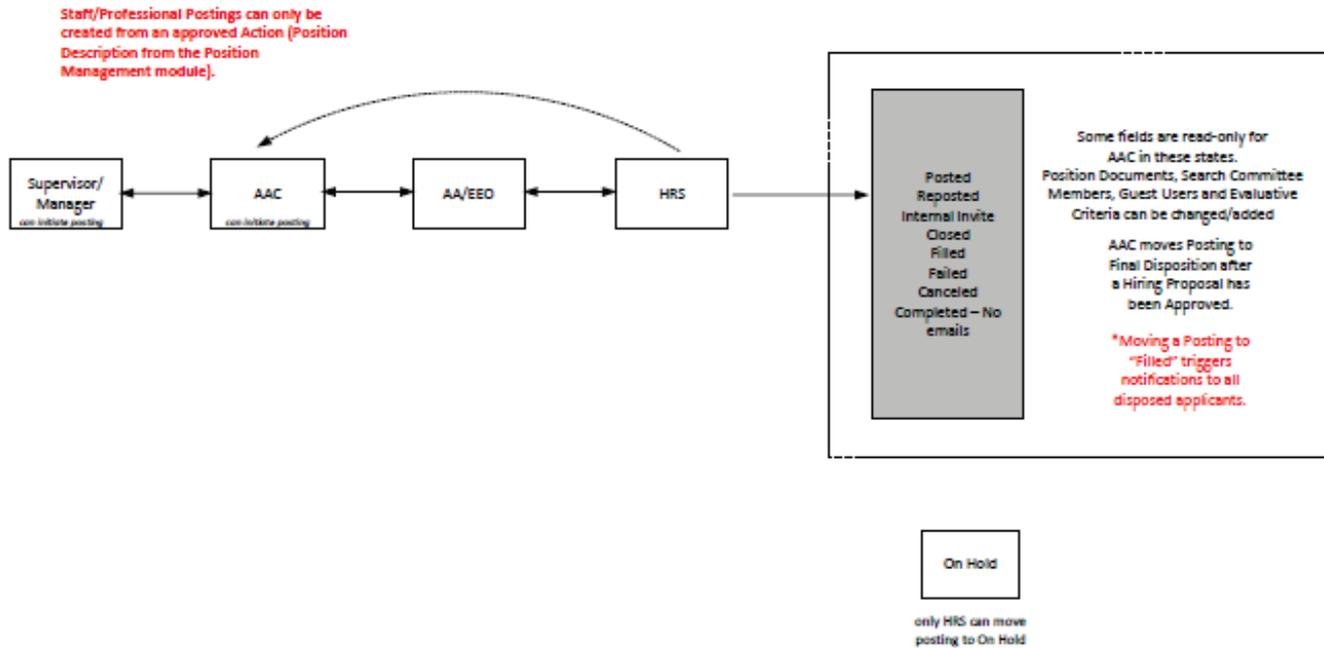
Note: If a background check has already been completed for a candidate, the hiring proposal would still need to visit the background check stop so HRS can confirm and add notes.
7. Finally, when the background check is complete, HRS will send the completed hiring proposal to the AAC to confirm that the candidate is now hired.
8. When the AAC confirms the candidate is hired, they will move the hiring proposal to "Hired." **Note:** Once a hiring proposal is moved to a status of "Hired," no changes can be made.

If you have any further questions or need extra help, please contact your corresponding AAC or reach out to Human Resources at:

hr-peopleadminhelp@uidaho.edu or 885-3611

Workflows

Staff/Professional Postings



Staff/Professional Hiring Proposal Workflow

