

HR-TMS

Human Resources -Talent Management System

Training Guide

For Hiring

Faculty Employees



BALL STATE
UNIVERSITY

WE FLY

University Human Resource Services

March 2020

University Human Resource Services' Talent Management System (HR-TMS) and PeopleAdmin

HR-TMS enhances the applicant experience by giving those interested in employment opportunities at Ball State University the ability to apply for positions 24/7 anytime, anywhere, through an online applicant portal. It will also allow hiring managers the online ability to create and maintain job descriptions for their areas, create job postings, view candidate applications, and hire employees.



The online system, HR-TMS, is hosted by PeopleAdmin, a PowerSchool Company. They are proud to be a recognized leader in talent management solutions designed specifically for education and government. PeopleAdmin works with more than 700 institutions of higher education and has received numerous awards (<http://www.peopleadmin.com/>).

We are pleased to offer you this step-by-step training manual for hiring your Faculty employees. Other employee groups – professional, staff and service - have their own guides.

If you have any questions about this exciting HR online talent management system or need assistance in completing an action in the HR-TMS, please email:

ERP@bsu.edu

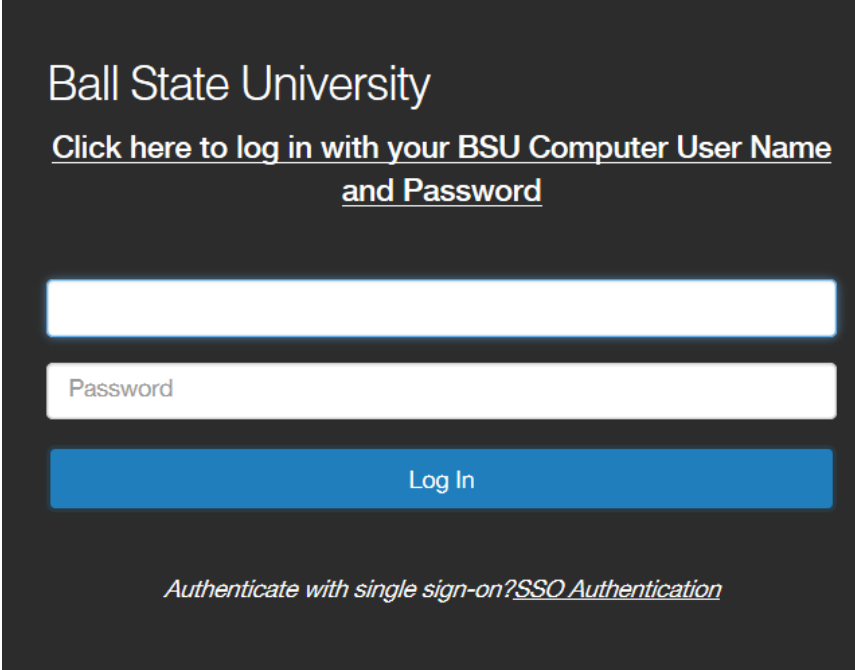
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Login Information

1. Website address: <https://bsu.peopleadmin.com/hr/> or you can find the HR-TMS link [here](#) – Click on “My BSU” to locate HR-TMS (People Admin) under Additional Tools.
2. You can log in by clicking on the white “[Click Here to log in with your BSU Computer User Name and Password](#)” link or you can click on the white “SSO Authentication link.”

Please note: the blank white fields for username and password will only be used if you, as an employee, have applied to an open position through the Applicant Portal and set up an account username and password.



Ball State University

[Click here to log in with your BSU Computer User Name and Password](#)





Password

Log In



[Authenticate with single sign-on? SSO Authentication](#)

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	TOP 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 requests you are watching (postings, position actions) for easy access.
<div> My Profile Help logout </div>	Upper Right corner of screen	Used to update your user account details and online help for using the system.
Module Type Selection <div>  Applicant Tracking System  Position Management </div>	Upper Left corner of screen	Used to toggle between the Position Management and Applicant Tracking System modules.
User Group Selection User Group: <div>Hiring Manager ▼</div>	Upper Right corner under your name, My Profile and Help section	Displays the user groups available to you via the drop-down box.

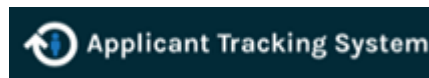
Watch for the following Icons:

-  This icon indicates that there is missing information in a section which must be completed before next action in workflow can be taken.
-  This icon indicates a section is complete, but will still allow editing in some instances.

Module Type Definitions



Used to view Position Descriptions, submit New Position Actions, and Modify Position Descriptions.



Used to create and view Postings, review Applicants, and complete Hiring Proposals.

User Group Definitions

Applicant Reviewer: Reviews applicants in the posting and moves applicants forward in the applicant workflow, while applying appropriate disposition codes. This is the only user group that can move applicants in the applicant workflow.

Hiring Manager: Create a new position action or modify position description. Reviews applicants per posting and creates and approves hiring proposals for new hires. Forwards action to Chair/Director, depending on workflow.

Chair/Director: Can initiate a new position action or modify position description. Approves actions sent from the Hiring Manager user group. Forwards action to AVP/Dean user group, depending on workflow.

Preliminary Budget Review: Reviews and approves budget information. Forwards actions to the AVP/Dean.

AVP/Dean: Can initiate a new position action or modify position description. Approves actions sent from the Chair/Director user group. Forwards actions to Vice President for review.

Provost Budget Director: For Academic Affairs division only, reviews and approves budget information.

EEO: Reviews and approves diversity of pools, diversity of recruitment plans, and may request additional recruitment sources be used.

Vice President (Provost): Can initiate a new position action or modify position description. Approves actions sent from the AVP/Dean user group. Forwards actions to Budget or SPA for review.

Sponsored Projects Administration (SPA): Reviews and approves grant funded position actions.

Budget: Reviews and approves all position actions for budget confirmation. Forwards action to the AVP-HR user group.

AVP-HR: Approves actions sent from the Budget and/or VP user group. Forwards actions to VP of Business Affairs or HR user group.

VP of Business Affairs: Reviews and approves position actions. Forwards actions to HR user group.

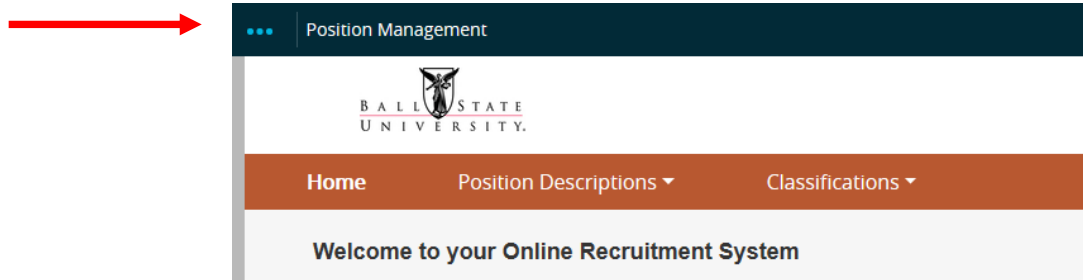
President: Reviews new positions, position requests and hiring proposals that are over budget, or in the President's area. Forwards actions to HR user group.

Search Committee member: Invited by Hiring Manager to participate in review of candidates and/or interviews in a specific posting.

****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. Position action can include: initiating a posting form, creating or modifying a position description, or approving a position and/or hiring proposal.

Position Management Module

(Orange header background – changes to blue when you are in Applicant Tracking System module)



To select the position management module, click on the three dots located in the top left corner of the home page and select Position Management.

Make sure you are logged in as the correct user group. If not, use the drop-down menu to select correct group.

User Group:

Hiring Manager

▼

A screenshot of the "User Group:" label and a drop-down menu. The drop-down menu is currently set to "Hiring Manager" and has a downward-pointing arrow on its right side. A red arrow points to the right side of the drop-down menu.

Core Functions of the Position Management Module

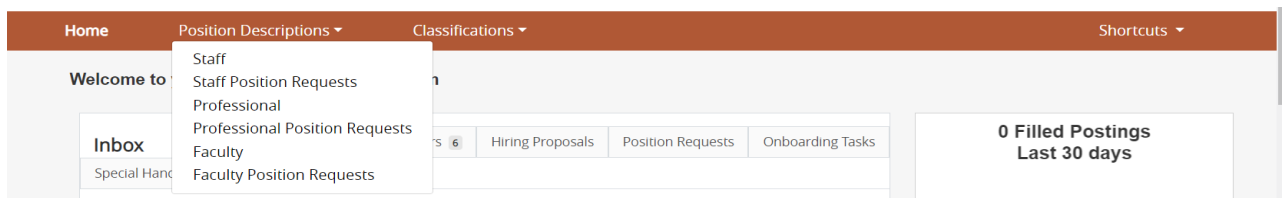
- View, create, or modify your Faculty position descriptions. **NOTE: if you are adding a new position for your area, please consult with your Budget Director FIRST before creating a new position. Your Budget Director might utilize an existing position number for your new position. In this case, you would modify that existing position number in TMS versus creating a new position in TMS. Additionally, if you are replacing someone in an existing position, you should be able to find it under Faculty Positions in TMS and be able to modify it.**
- Obtain the necessary approvals to post a Faculty position
- Make title, compensation, FOAP, supervisor changes for incumbent
- Access active and approved position description requests

Creating a New Position Description (New Position Request):



1. Verify you are in the Position Management module and either Hiring Manager, Chair/Director, or AVP/Dean user group.

2. Hover over Position Descriptions and select **Faculty**.



3. Click the  button at the top right corner.

4. You will receive a pop-up window to choose the action you would like to start. Click on **New Position**

5. Enter the proposed Position Title.

6. The Organization Unit section will default unless you have responsibility for more than one department. You will then select from the drop down list.

7. If you have an existing position description within your department(s) you wish to copy or 'clone,' click on "Filter these results." You can search for the position description you would like to clone by searching on a title, position number, or department and then clicking on Search.

Clone an existing Position Description?

 [Filter these results](#)

8. Once position has been located, click on the radio button next to the title of the position you wish to clone.

	Position Number	Position Title
<input type="radio"/>	100883	Assistant Professor
<input checked="" type="radio"/>	100884	Associate Professor
<input type="radio"/>	100885	Assistant Professor

9. Click the **Start Position Request** button.

Start Position Request

10. This will pull in pertinent information from the 'cloned' position description into this action and allow for edits.

11. Complete all required information in each of the sections which are listed on the left hand side of the screen. Please note that if you 'cloned' from an existing position description many of the fields will be prepopulated and ready for you to edit if applicable.

12. The following is a list of the sections within a new position action that will need to be completed. The sections with a check mark next to the section indicate all required fields have been completed.

Editing Position Request

- ✓ Position Justification
- ✓ Position Details
- ✓ FOAP Details
- ✓ Supervisory Position
- ✓ Position Documents
- Position Request Summary

State justification for new position request. Indicate if this position will be posted and if a search committee will be used. Salary information is required for the position.

Enter position details, such as the description, duties and responsibilities, education and experience required, and supervisor's position number. If a new position is being created, Human Resources will assign a new position number after position request has been moved to HR in the approval workflow.

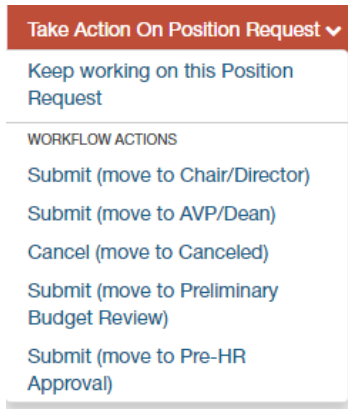
Identify funding sources for this position. Grant funding is also identified in this section. Please enter organization title as well as percentage funded.

Select supervisor's position from list.

Upload optional supporting documents for the new position action.

On the Position Request Summary page, prior to taking action, you will review for accuracy all of the information you entered into the request or make additional edits if necessary.

13. Once you have reached the Position Request Summary, you can take action by hovering over the Take Action on Position Request button at the top right corner of the page and select one of the following:



****Please note, to save this request and submit later, please select 'Keep working on this Position Request.' If there are additional approvers within the department, you will need to select the appropriate action per the workflow.***

To determine where to move the request, please refer to the Professional Workflow Decision Trees which are found on the HR-TMS Home page under My Links (right margin of screen).

14. You will receive a Take Action pop up window which will send an email in Outlook to the next approver to notify them they have an action pending. You can enter any comments you want before submitting, but please note comments will be tied to the historical record of this action. If this position is funded by a grant, please include the name of the Grant Manager in your comments. If you want to include the action in your watch list, check that box before clicking **Submit**.
15. You will receive a blue bar on the top of your page that will state the action was successfully transitioned.



Modifying an Existing Position Description:

1. Verify you are in the Position Management module and either Hiring Manager, Chair/Director, or AVP/Dean role.



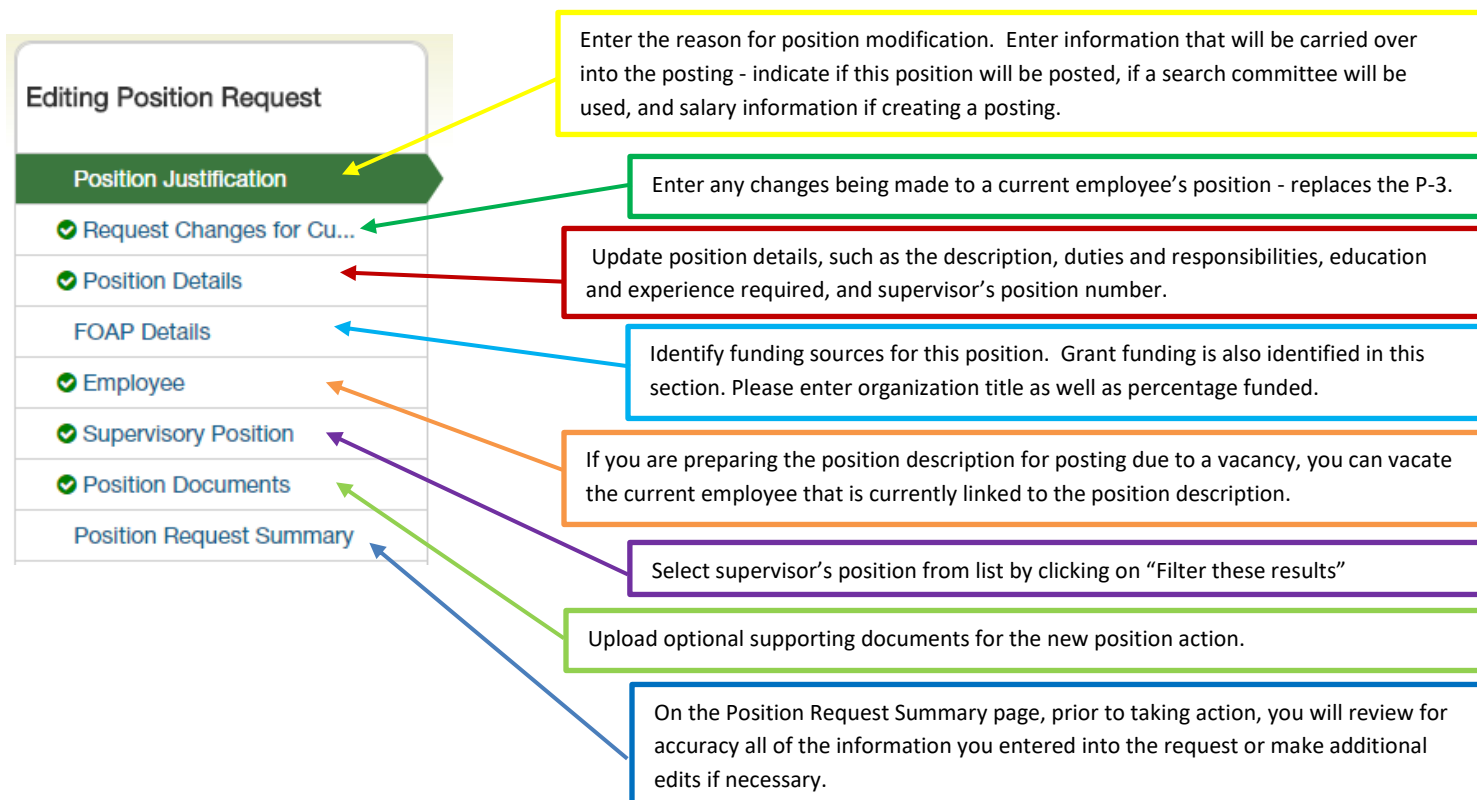
2. Hover over Position Descriptions menu and select **Faculty**.



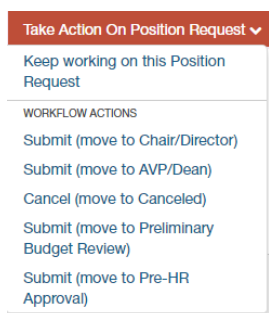
3. Search for and select the position description you wish to update.
4. Click the Modify Position Description link within the position summary (upper right hand corner).



5. Click **Start** on the modify position description page.
6. The following is a list of the sections within the Modify Position Description Action that will need to be completed. The sections that have a check mark next to the section indicate all required fields have been completed:



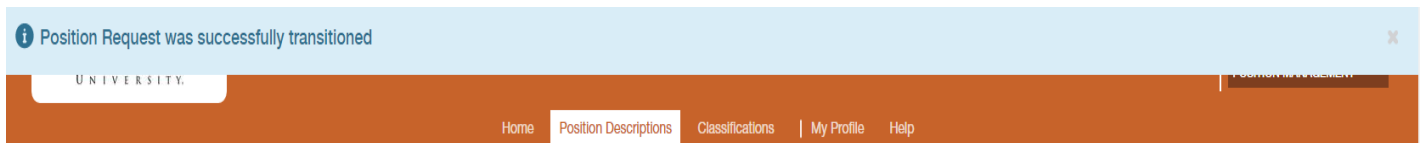
- To take action, hover over the Take Action on Action button at the top right corner of the page and select one of the following:



Please note, to save this request and submit it later, please select 'Keep working on this action.' If there are additional approvers within the department, you will need to select the appropriate action per the workflow.

- You will receive a Take Action pop up window which will send an email in Outlook to the next approver to notify them they have an action pending. You can enter any comments you want before submitting, but please note comments will be tied to the historical record of this action. If this position is funded by a grant, please include the name of the Grant Manager in your comments. If you want to include the action on your watch list, check that box before clicking **Submit**.

9. You will receive a blue bar on the top of your page that will state the action was successfully transitioned.



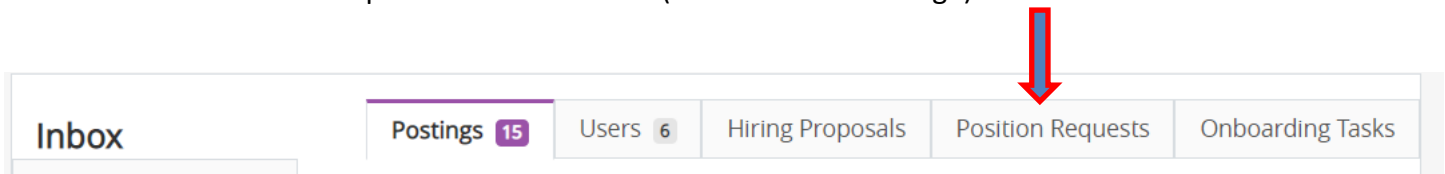
Position Management Module

Approving a Position Description Action:

1. Verify you are in the Position Management module and in the correct user group for approval.



2. Click on the Position Requests tab in the Inbox (located on Home Page).



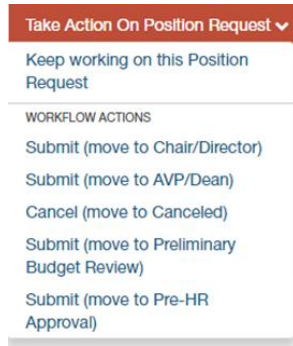
3. Locate the title of the Position Description in your Inbox you wish to take action on. Click on the title.
4. You will then be directed to a Summary Page where you can review for accuracy.
5. Remember if it indicates in the Posting Information of the Position Justification section that this position will be posted, your approval of the position description is also your approval to post this position. See below:

Posting Information

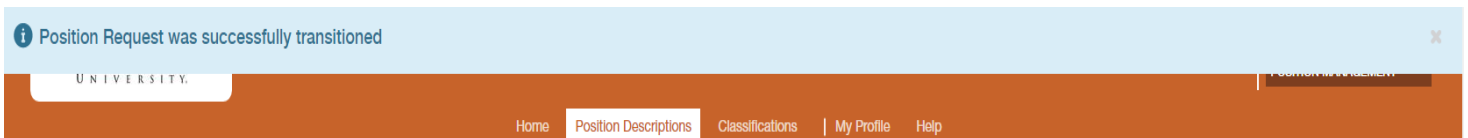
If you are requesting to post the position, please indicate below and carefully review the salary information. The proposed pay range minimum and maximum will be used for the posting. If you are requesting to post the position, Human Resources will initiate the posting request once the position description is approved.

Will this position be posted as soon as the position description is approved?	
Will a search committee be used?	

6. Take action on the Position Request by clicking on Take Action on Position Request. If corrections need to be made to the action, you can edit the position request or you can send it back to appropriate user group by selecting Return (move to ...).

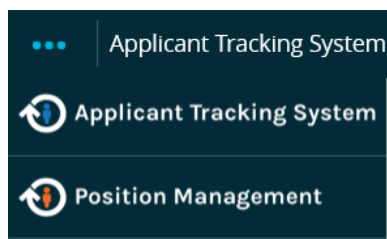


7. You will receive a Take Action pop up window which will send an email in Outlook to the next approver to notify them they have an action pending. You can enter any comments you want before submitting, but please note comments will be tied to the historical record of this action. If you want to include the action on your watch list, check that box before clicking **Submit**.
8. You will receive a blue bar on the top of your page that will state the action was successfully transitioned.



Applicant Tracking System Module

(Blue background – changes to orange when you are in the Position Management module)



To select the Applicant Tracking System module, click on the three blue dots located in the top left corner of the home page and select Applicant Tracking System.

Make sure you are logged in as the correct user group. If not, use the drop-down menu to select correct group.

User Group:

Hiring Manager ▼

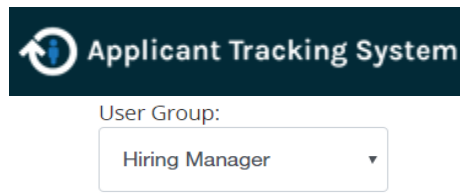
Core Functions of the Applicant Tracking System Module:

1. Review, complete and submit a posting for recruitment
2. View job postings and applicant materials
3. Create Hiring Proposals for Tenure-track faculty and FT/PT Contract Faculty Academic Year.

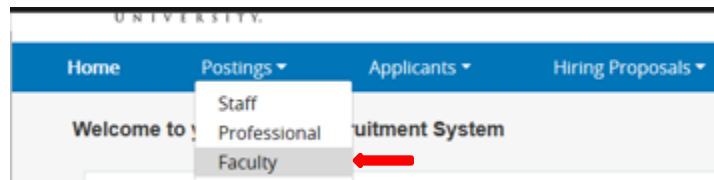
Applicant Tracking System Module

Creating a New Posting:

1. Verify you are in the Applicant Tracking System module as a Hiring Manager.



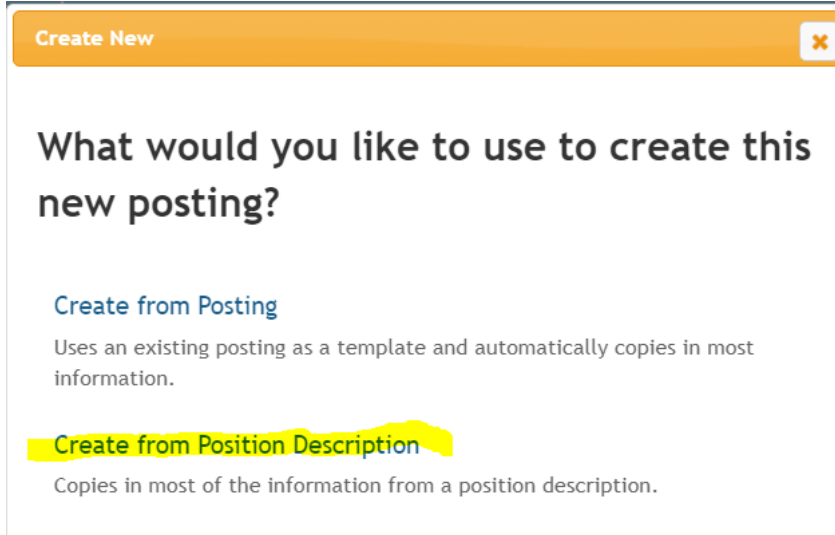
2. Hover over Postings and click **Faculty**.



3. Select the orange “+ Create New Posting” button.



4. You will see the following window appear:



Create New

What would you like to use to create this new posting?

Create from Posting

Uses an existing posting as a template and automatically copies in most information.

Create from Position Description

Copies in most of the information from a position description.

Choose “Create from Position Description”. This will take you to a list of positions in your area. By creating the posting from the position description, this will populate the information into the posting from the position request that was just updated. The “Create from Posting” option is seldom used. An example of using this option would be a recently failed professional search where you would like to post it again a position modification does not have to go through the workflow for approvals. Another posting can be created that will be identical to the prior posting.

5. Select the position by clicking on the position description title. This will take you to the position description, and you will select “Create Posting from this Position Description” on the right side of the screen.
6. This will take you to the Settings tab which contains the “New Posting” section. Complete all the fields such as Position Title, choose your division and department, and under “Accepted Application Forms”, check the box next to “Faculty Application”. This ensures that applicants will see the posting on the BSU applicant portal. Click on the orange “Create New Posting” button, and complete each section of the posting. Be sure to consider including a promotional paragraph since that appears in the posting at the top of the posting after the position title.
7. Each of the posting sections are described in detail on the following pages.



Posting Details

1. **Posting Information Section:** most information in this section will default into the page from the position description. Some fields are either optional or required. Required information will be indicated by a red asterisk and a red box. Position Number, Description, Duties and Responsibilities, Minimum Qualifications, Preferred Qualifications, Positions Supervised, EEO Statement are **not** editable. These fields would have to be edited during the position creation/modification process. Please note: you may select more than one option in the required Pre-Employment Screening Box, and

the typical option for faculty postings is “Requires successful completion of a background check and education verification.”:

* Pre-Employment Screening

Requires successful completion of a Drivers License check

Requires successful completion of a physical examination

Requires successful completion of a physical skills test

Requires successful completion of a background check and education verification.

2. Posting Detail Information Section:

Number of Vacancies – number of vacancies for this posting – will usually be one unless you have multiple position requests that are identical that have been approved, so that you can have one posting with multiple vacancies.

Desired Start Date – date that you would like to have someone begin working.

Position End Date – used for jobs that have an end date. If there is no end date, leave field blank.

Hiring Manager – person who will be entering the hiring proposal. Type in last name and select from list.

Applicant Reviewer – person responsible for managing the applicants through the screening and selection process – may or may not be the same as the Hiring Manager – can select more than one person.

Number of Calendar Days that Applications will be accepted – select number of calendar days between 14 and 90 that you would like posting to remain open. For tenure-track vacancies, the minimum is 30 calendar days. Ready pool postings for F2, F4 and F5 positions may be open a minimum of 5 days, but you will still select 14 in this field, and use the “Open Date” and “Applications Accepted Through Date” fields to indicate the shorter posting length.

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

Applications Accepted Through Date - date that you wish the position to be closed automatically.

Open Until Filled – Using this option must be approved by the Office of the Provost.

Special Instructions Summary – Optional specific instructions help the applicant fully complete his/her application.

Quick Link for Internal Posting – link to the posting in the applicant portal. This might be used for an internal posting.

Application Confirmation Message – This message is what will be sent via email to the applicant once he/she has successfully submitted an application for the position.

Do You Plan to use a Search Committee for this Search? – select either Yes or No.

Supplemental Questions

1. Supplemental questions are available and optional as an additional screening tool for applicants. If you would like to use a supplemental question, please click [Add a question](#). You may choose questions from those available by category or by keyword.

Add a question

Included Supplemental Questions

Position	Required	Category	Question	Status
<input type="checkbox"/>	Education		Do you have an associate's degree or two years of college or have you successfully completed Indiana Law Enforcement Basic Training or equivalent approved by Indiana Law Enforcement Training Board?	
<input type="checkbox"/>	Education		Do you have a bachelor's degree or equivalent in criminal justice or related field or have you successfully completed Indiana Law Enforcement Basic Training or equivalent approved by Indiana Law Enforcement Training Board?	
<input type="checkbox"/>	Education		If yes, please list your major:	
<input type="checkbox"/>	Education		What is your highest degree?	

2. If you do not see an existing question you would like to ask, Supplemental Questions can be added here. Click on [Can't find the one you want? Add a new one](#) in the bottom right corner of the box. A new Add a Question box will pop up.

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.

Name *

Status *

pending ▾

Category

Please select a category ▾

Question *

Possible Answers

☒ Open Ended Answers

☐ Predefined Answers

3. Create a name for the question (e.g. Faculty – Degree, Faculty – Certification). Choose a name that describes the question and/or uses terminology that might be used when conducting a search for a specific question.
4. Select a category for your question from the drop down list (Education, Experience, or Other).
5. Enter the question you would like to use in the Question text box.
6. You will need to select which type of answer will be needed for your question:

Possible Answers

- ☒ Open Ended Answers
☐ Predefined Answers

7. Open ended answers allow the applicants to respond with whatever answers they choose.
8. Predefined answers allow you to choose the possible responses. Once you select Predefined Answers the Possible Answer boxes will appear. You may enter the possible answers. The default has two answers, but there is no limit. As soon as you enter the first answer in Possible Answer 1 and hit Tab, then a new line will appear as Possible Answer 3 and so on.

Possible Answers


- ☐ Open Ended Answers
☒ Predefined Answers

Empty answers will be excluded. Click and drag possible answers to reorder them.

Possible Answer 1: *

Possible Answer 2: *

9. Once you have selected the supplemental questions you would like to ask, click on submit.
10. In order to make sure the supplemental question is required, you must select the required box.

Position	Required	Category	Question	Status
1	<input type="checkbox"/>	Education	Do you have a bachelor's degree?	active 



Applicant Documents

Applicant Documents are the documents and information the applicant is required to submit with his or her application. Select the “Required” selection for any documents that you would like to require the applicant to submit for evaluation. Since the Faculty application does not require the applicant to enter any employment or education information, curriculum vitae should always be a Required document. Transcripts should be

Optional documents. You may change the order in which they are listed by changing the ranking number in the “Order” column boxes:


Applicant Documents				
Select the documents to be required with this item, and those that may optionally be attached. Document types marked "Not Used" cannot be attached to this item.				
Order	Name	Not Used	Optional	Required
<input type="text" value="1"/>	Resume	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
<input type="text" value="2"/>	Cover Letter	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
<input type="text" value="3"/>	Undergraduate Transcripts	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
<input type="text" value="4"/>	Letter of Recommendation 1	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
<input type="text" value="5"/>	Curriculum Vitae	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>
<input type="text" value="6"/>	Master's Transcripts	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>

Recruitment Plan

University Human Resource Services has negotiated advertising packages with a number of value-added sites, where your ads will automatically be placed. You have the option to request additional placements from a list of frequently requested sources or others that you indicate in the discipline specific/other section of this form. If you list discipline specific or other sites, please provide details such as the website address and the format of the ad.

1. To add a discipline specific/other source, click on the “Add Discipline-Specific/Other Sources Entry” button.


Discipline-Specific/Other Sources


Add Discipline-Specific/Other Sources Entry

2. Enter the name of the source, as well as details regarding the web address and formatting of the ad. Please indicate if it is a diversity recruitment source by selecting “yes” or “no” using the drop-down menu.

Discipline-Specific/Other Sources

Source


Is this a Diversity Recruitment Source? ▼ 

☐ Remove Entry?

[Add Discipline-Specific/Other Sources Entry](#)

- Please indicate any other department listservs or email burst placed by department. To do this, click on the “Add Other Department-Initiated Listservs or Email Bursts Placed by Department” button.


Other Department-Initiated Listservs or Email Bursts Placed by Department

 [Add Other Department-Initiated Listservs or Email Bursts Placed by Department Entry](#)

- Enter the name of the source and indicate if it is a diversity recruitment source by selecting “yes” or “no” using the drop-down menu.

Other Department-Initiated Listservs or Email Bursts Placed by Department

Source

Is this a Diversity Recruitment Source? ▼ 

☐ Remove Entry?

[Add Other Department-Initiated Listservs or Email Bursts Placed by Department Entry](#)

- Information under “Contact Information for Advertising” should come over from the questions you answered when you created or modified your position for posting. This is typically the contact information for the search committee chair.

Guest User

The Guest User feature is intended for those individuals who are **not an employee of Ball State University** 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 BSU student on your search committee. A Guest User will be able to view the

applicants and application materials for the search he/she is given access to. He/she will not have the ability to make any actions on applicants.

1. To add a Guest User, select Create Guest User Account.

Want to give guests access to view this posting?

Create Guest User Account

2. A Username and Password fields will appear with a username and password already assigned. If you would like to change the password, update the information in the “Password” field and select the “Update Password” button. Enter the email address of the guest user and the Username and Password will be automatically sent to them. All Guest Users that are assigned will have the same Username and Password to access the specific posting.

When finished or to skip this section, click the **Next** button.

Guest User Credentials

Guest users may view this posting by using these credentials.

Username

gu4213

Password

9c6e5c

Update Password

Email Addresses of Guest User Recipients

Email addresses (one per line)

Update Guest User Recipient List

Search Committee Members

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

1. To add search committee members, you may search for someone in the database by entering the first name and last name under “Add Existing User”:

Add Existing User

user as a Search Committee member by clicking on Add Member.

Add Existing User

Search:

Department:

Search

☒ Display search committee user group members only

*Only employees who have been **previously** assigned to a search committee on a posting in TMS will be available in the search.

- Once you see the employee you would like to add to the search committee, click on the Add Member button:

Last Name	First Name	Email	Department	Committee Chair	(Actions)
Schlensker	Susan	SLSCHLENSKER@BSU.EDU	Ball State University	<input type="checkbox"/>	<div>Add Member</div>



- If the employee will also serve as the Committee Chair, you can select the checkbox next to the Add Member button.
- If you are unable to find an employee name to assign to a search committee, please note that the blue **Create New User Account** button is not active at this time. Request initial permissions from IT, following the instructions found at: <https://www.bsu.edu/-/media/www/departmentalcontent/human%20resources/pdfs/hr%20forms/requesting%20roles%20in%20tms%20or%20epaf%20access%20dec%202019.pdf?la=en&hash=8A4623D23FD60BE095226AB9FC31064D0179D6E1>. (Please note that when IT assigns a Search Committee user role to an employee, that is the first step. The second step is for the Hiring Manager to add that user to the Search Committee tab in the posting. If you have already moved the posting to your HR Partner, please notify him/her to add the person to the search committee once you have received a notice from IT.)

Reference Letter Feature

The faculty application is configured to require a minimum of three professional references, but you can edit this feature in the posting form to increase that amount:

✔ Reference Letter Feature	
Reference Letter Feature	
Minimum Requests	3
Maximum Requests	
Last Day a Reference Provider Can Submit Reference	
Provider Special Instructions	

HR-TMS also has the functionality to automatically solicit letters of recommendation from individuals whose contact information is provided by the applicant in the Professional Reference section of the application. If you would like to take advantage of this functionality, please contact your HR Partner, who will explain the process and configure the setting in the posting.

Summary

Allows you to take a final look at the posting for accuracy.

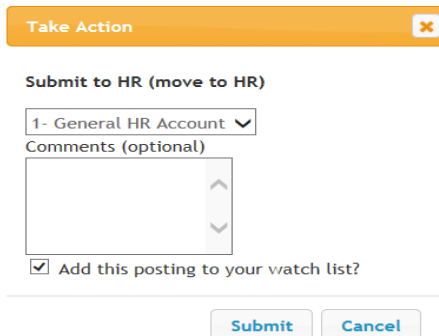
After you have entered the posting information and have reviewed the Summary:

1. You may then take action on the Posting by using the drop-down menu on the upper right hand side of the page.

Take Action On Posting ▼
Keep working on this Posting
WORKFLOW ACTIONS
Cancel (move to Canceled)
Submit to HR (move to HR)

****Please note, to save this request and submit later, please select 'Keep working on this Posting.' If there are additional approvers within the department, you will need to select appropriate action per the workflow.***

2. You will receive a pop up window 'Take Action' which will send an email in Outlook to the approver in HR that you have selected to notify them they have an action pending. **Please select your HR Partner instead of the General HR Account shown below so that your HR Partner will be notified of the posting promptly.** Note: comments will be tied to the historical record of this action. Check the box to include the action on your watch list and then click Submit.

A pop-up window titled "Take Action" with a close button in the top right corner. The window contains the text "Submit to HR (move to HR)" above a dropdown menu currently showing "1- General HR Account". Below the dropdown is a text area labeled "Comments (optional)". At the bottom, there is a checkbox labeled "Add this posting to your watch list?" which is checked. Two buttons, "Submit" and "Cancel", are at the bottom right of the window.

Take Action

Submit to HR (move to HR)

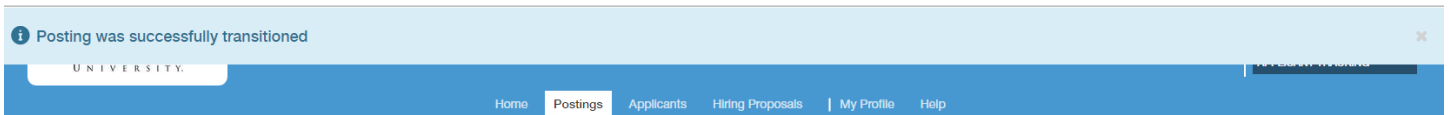
1- General HR Account ▼

Comments (optional)

☒ Add this posting to your watch list?

Submit Cancel

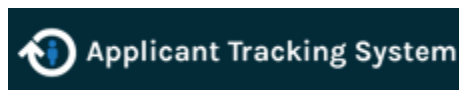
3. You will receive a blue bar on the top of your page that will state the posting was successfully transitioned.



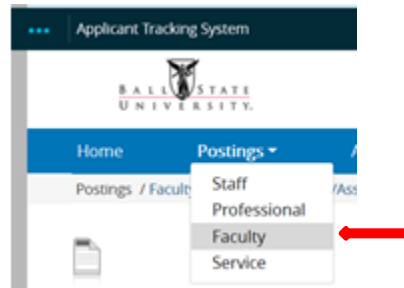
Applicant Tracking Module

View Job Posting:

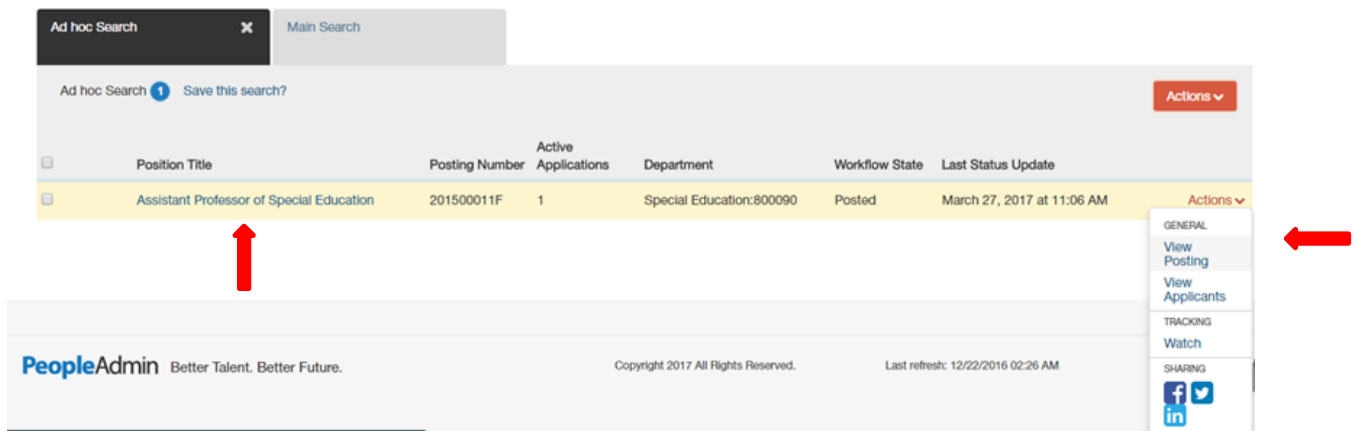
1. Verify you are in the Applicant Tracking System module in either Hiring Manager or Applicant Reviewer user group.



2. Hover over Postings and select **Faculty**.



- You have two options to view the posting. You can either click on the blue position title or you can click on the blue Actions drop-down menu on the right-hand side of the posting line and select View Posting. In the Actions drop-down menu you can also add the posting to your Watch list.



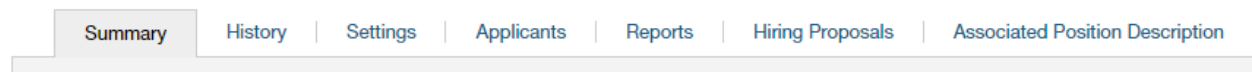
- The following tabs are available with additional information associated with your posting: Summary, History, Settings, Applicants, Reports, Hiring Proposals, and Associated Position Description.

Posting: Assistant Professor of Special Education (Faculty)

Current Status: Posted

Position Type: Faculty
Department: Special
Education:800090

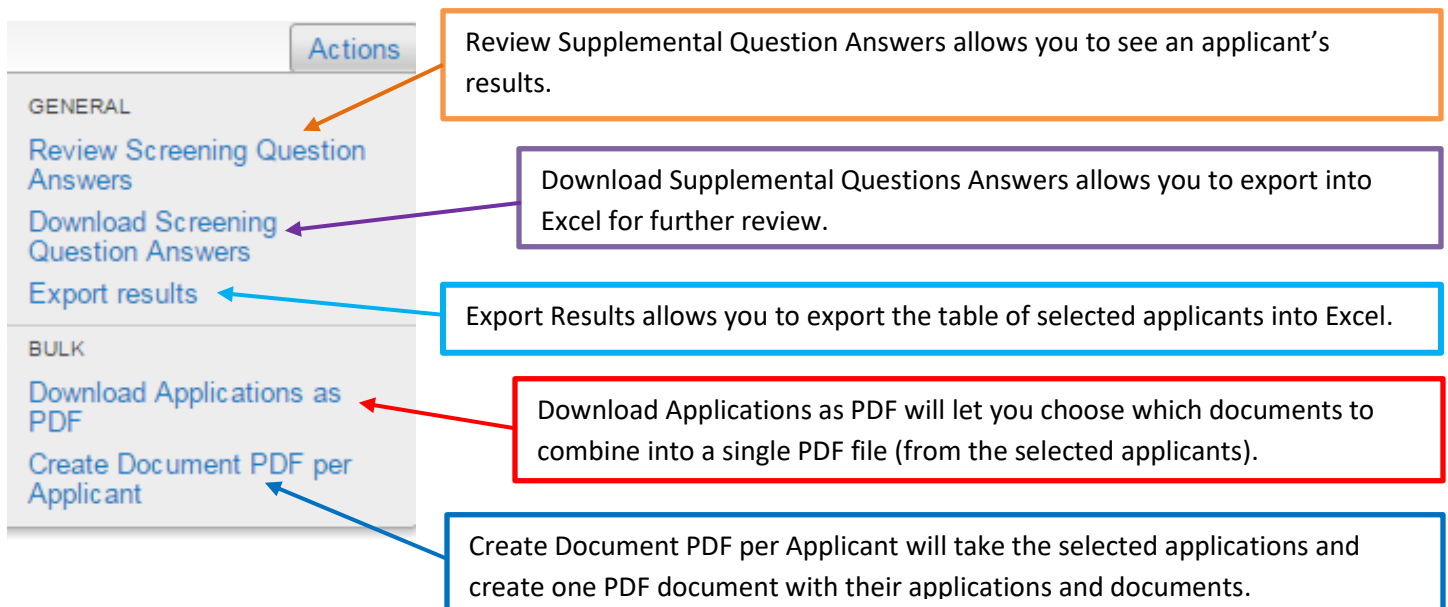
Created by: Kamille Webb
Owner: Human Resources : Susan
Schlensker



Summary Tab – Shows a summary of the posting.

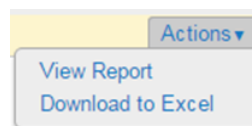
History Tab – Shows a history of user actions taken on the posting.

Applicants Tab - Click the Actions button on the right-hand side of the Applicants tab for more applicant review options.



Reports Tab – will show you any available reports for that position. To access a report, click on report name.

Once the report has run, you will have two options: View Report or Download to Excel. Click on the Actions tab and select how you would like to view the report. If you click on View Report, it will open in a new window.



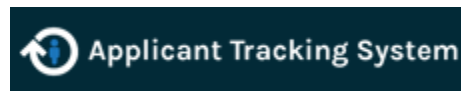
Hiring Proposals Tab – will show any hiring proposal(s) associated with the posting.

Associated Position Description Tab – shows you the position description associated with this posting. If you are logged in as an Applicant Reviewer, this tab is not available. Changes may not be made to a position description while that position is posted.

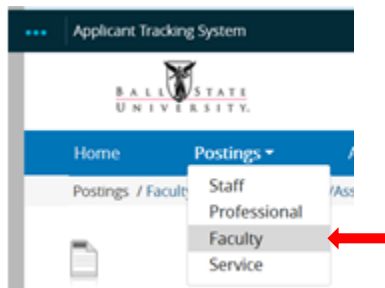
Applicant Tracking Module

Viewing Applicants/Changing Applicant Statuses:

1. Verify you are in the Applicant Tracking System module and either the Applicant Reviewer or Search Committee Member user group.



2. Hover over Postings and select Faculty.



3. Locate the posting and click the Actions menu and choose View Applicants.

Ad hoc Search × Main Search

Ad hoc Search 6 Save this search?

Actions

	Position Title	Posting Number	Active Applications	Department	Workflow State	Last Status Update	
<input type="checkbox"/>	John and Janice Fisher Professor of Exercise Science	201500001F	0	Human Performance Lab:500080	Closed/Removed from Web	February 25, 2017 at 12:14 AM	Actions
<input type="checkbox"/>	Test Faculty Instructor 24Jan	201500003F	0	School of Nursing:900020	Closed/Removed from Web	April 17, 2017 at 03:36 PM	GENERAL View Posting View Applicants TRACKING Watch
<input type="checkbox"/>	Test Faculty Instructor 27Jan	201500004F	0	School of Nursing:900020	Closed/Removed from Web	April 17, 2017 at 03:37 PM	
<input type="checkbox"/>	Test Faculty Instructor 3Feb	201500005F	1	School of Nursing:900020	Closed/Removed from Web	April 17, 2017 at 03:37 PM	
<input type="checkbox"/>	Test Faculty Tenure 6Feb	201500007F	0	School of Nursing:900020	Closed/Removed from Web	April 17, 2017 at 03:40 PM	
<input type="checkbox"/>	Test Faculty 8Feb	201500008F	0	School of Kinesiology:900030	Closed/Removed from Web	April 17, 2017 at 03:40 PM	Actions

4. Either click on the applicant's last name **OR** click the 'Actions' menu for each application and select View Application.

Summary | History | Settings | Applicants | Reports | Hiring Proposals

Open Saved Search Search: Search More search options

Active Applications 3

Saved Search: "Active Applications" (1 Item Found) Actions

	Applicant Last Name	Applicant First Name	Requisition Number	Workflow State (Internal)	Last Updated	(Actions)
<input type="checkbox"/>	Pryor	Teresa	201500001P	Under Review by Department	January 07, 2016 at 03:50 PM	GENERAL View Application

5. Select Take Action on Job Application and select the state you wish to change the applicant to from the menu.

The screenshot shows a dropdown menu titled "Take Action On Job Application" with a downward arrow. The menu is open, displaying a list of actions. The first action is "Keep working on this Job application". Below this is a section header "WORKFLOW ACTIONS". The list of actions includes: "Department determined minimally qualified (move to Department determined minimally qualified)", "Select (move to Alternate Candidates)", "Submit (move to Phone Pre-Screen Needed)", "Select (move to Phone Pre-Screened - Not Selected - email at Filled)", "Submit (move to Request to Interview - AVP/Dean)", "Submit (move to Request to Interview - VP of Business Affairs)", "Submit (move to Request to Interview - Vice President)", and "Do Not Select (move to Not Interviewed, Not Selected - Email when filled)".

If you select *Do Not Select (move to Not Interviewed, Not Selected – Email when filled)*:

A Take Action box will pop up; and you will need to select the reason. The drop-down menu button will not show; you can either click where it reads *Please select* and the reasons will appear or you can click and drag the lower right-hand corner of the box to make the box bigger and the menu button will appear. Make your selection and then confirm by clicking submit in the Take Action pop-up window.

The screenshot shows a pop-up window titled "Take Action". It contains a section labeled "Reason (required)" with a dropdown menu. The dropdown menu is open, showing a list of reasons for not selecting a candidate. The reasons are: "Please select", "D1 - Application incomplete", "D2 - Submission received after position closed or filled", "D3 - Does not meet minimum qualifications - education", "D4 - Does not meet minimum qualifications - experience", "D5 - Does not meet minimum qualifications - other required license/certification/credential", "D6 - Did not leave the university in good standing", "D9 - Experience not as strong as other candidates", "D10 - Education not as strong as other candidates", "D11 - Duplicate application", "D12 - Candidate withdrew from consideration (pre-offer)", "D13 - Candidate not eligible to work in the U.S.", "D14 - Later discovered fraudulent information in application/interview materials", "D15 - Position not filled", "D16 - Failed search", "D17 - Hiring freeze", "D18 - Retiree - not eligible for benefited positions", "D19 - Unable to verify/unsatisfactory references", and "D20 - Non-BSU employee applicant, not eligible for internal posting".

Continue the steps until all applicants you are not interviewing have been moved through appropriate workflow actions to update their status.

Moving Applicants into Request to Interview workflow:

Select “Request to Interview – AVP/Dean”.

Your dean will then move applicants to “Request to Interview – Vice President”.

The Vice President (Provost) will then move applicants to Human Resources.

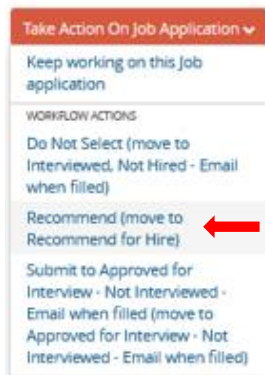
Your HR Partner will review each applicant’s qualifications to verify their eligibility for interview and move to EEO if applicant is qualified.

EEO will review the applicant pool and move the applicant into Approved for Interview.

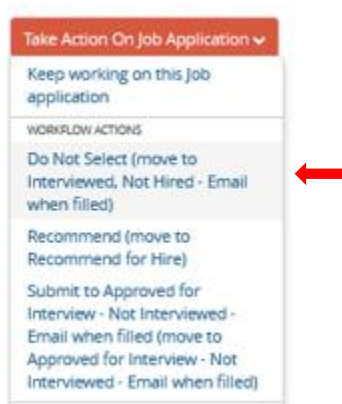
The Request for Interview workflow is used for FT benefits eligible faculty positions only: Tenure or Tenure Track Faculty (F1) and Full-time Contract Faculty (F3) postings only.

If hiring PT Semester Contract Faculty (F4), FT Semester Contract Faculty (F5) or Part-time Academic Year Contract Faculty (F2), you may move the candidate directly from “Under Review by Department” to “Specialty Recommend for Hire”, and bypass the Request to Interview stage.

6. Once an Applicant Reviewer has identified the applicant to hire into a Tenure or Tenure Track Faculty (F1) or a Full-time Contract Faculty Academic Year (F3) position from those who have been approved for interview, select *Recommend (move to Recommend for Hire)* in the Take action on Job Application drop-down menu. An email will be sent to Human Resources which will initiate the background check. The Hiring Proposal may be entered at this time.



7. Move remaining applicants who were interviewed, but not selected into the Do Not Select (move to interviewed, Not Hired – Email when filled) by clicking on the orange Take Action on Job Application drop-down menu.



8. If the action was successful, you will see a blue bar indicating the “Application was successfully transitioned.”

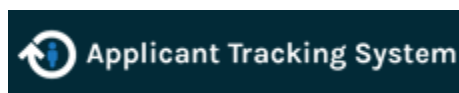


Applicant Tracking Module

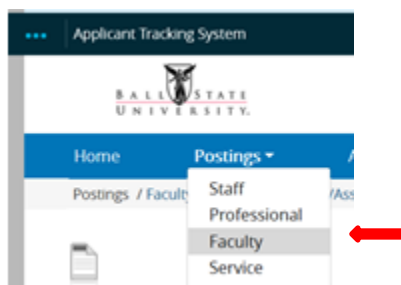
Creating a Hiring Proposal for Tenure-track Faculty (F1) or FT/PT Academic Year Contract Faculty (F3/F2)

(For FT/PT Semester Contract Faculty hires (F5/F4), do not create a Hiring Proposal; instead, you will create an EPAF.)

1. Verify you are in the ‘Applicant Tracking System’ module in the Hiring Manager user group.



2. Hover over ‘Postings’ and select Faculty.



3. Locate the posting and click the 'Actions' menu and choose view applicants.

Postings / Faculty

Faculty Postings

[+ Create New Posting](#)

[Saved Searches](#) [Search](#) [More Search Options](#)

Ad hoc Search ☒ **Main Search**

Ad hoc Search **11** [Save this search?](#) [Actions](#)

<input type="checkbox"/>	Position Title	Posting Number	Active Applications	Department	Workflow State	Last Status Update	Actions
<input type="checkbox"/>	Test Faculty 14Feb	201500009F	3	Journalism:400030	Posted	February 14, 2017 at 02:39 PM	Actions
<input type="checkbox"/>	Test Faculty 15Mar	201500010F	1	School of Kinesiology:900030	Posted	March 23, 2017 at 04:30 PM	Actions
<input type="checkbox"/>	Assistant Professor of Special Education	201500011F	1	Special Education:800090	Posted	March 27, 2017 at 11:06 AM	Actions
<input type="checkbox"/>	Instructor	201500012F	3	Special Education:800090	Posted	April 05, 2017 at 03:56 PM	Actions
<input type="checkbox"/>	F1 Test Professor 17Apr	201500013F	5	School of Kinesiology:900030	Posted	April 17, 2017 at 03:27 PM	Actions
<input type="checkbox"/>	F2 Test PT Contract Fac 17Apr	201500014F	6	School of Kinesiology:900030	Posted	April 17, 2017 at 03:34 PM	Actions
<input type="checkbox"/>	F3 Test Contr Fac 17Apr	201500015F	5	School of Kinesiology:900030	Posted	April 17, 2017 at 03:42 PM	Actions
<input type="checkbox"/>	F4 Test PT Instructor 17Apr	201500016F	4	School of Music:600040	Posted	April 17, 2017 at 03:45 PM	Actions
<input type="checkbox"/>	F5 Test FT Instructor 17Apr	201500017F	6	Family & Consumer Sciences:500020	Posted	April 17, 2017 at 03:48 PM	Actions
<input type="checkbox"/>	Assistant Professor	201500018F	1	Family & Consumer Sciences:500020	Posted	April 23, 2017 at 01:33 PM	Actions

[/bsu-sb.peopleadmin.com/hr/postings/7113](#) **SUPPORT**

GENERAL
[View Posting](#)
[View Applicants](#)

4. Select applicant you would like to start the hiring proposal for by either clicking on his/her name or using the Actions button at the end of his/her line and selecting View Application. This workflow replaces the EPAF for these types of positions.
5. Click on Start Hiring Proposal in the upper right side of the application:

★ [View Posting Applied To](#)

★ [Preview Application](#)

⊕ [Start Hiring Proposal](#)

6. Position should already be selected; if not, click on the button beside the correct position title.

7. Then click [Select Position Description](#).

8. The Hiring Proposal will appear in an editing state so that required fields can be filled in. Click on the applicant's name to review the summary and make edits if needed.

If you don't know the information listed as optional below, Human Resources will update the Hire Information once the candidate has verbally accepted the position.

Employee ID – optional - if selected candidate is a current employee and you have their BSU ID number, you can enter it here, but you may leave blank as HR will complete this field.

Highest Degree Obtained – **required** – enter highest degree earned by selected candidate.

Position title if different from above - **required** – if job was posted as “Associate or Assistant...” indicate title assigned here. If title is entirely different from what title was in the posting, such as hiring an Associate Professor when the title Assistant Professor was posted, a Recommendation for Unusual Appointment form is usually required and can be attached in the Hiring Proposal.

Base Annual Salary – **required** – enter the base annual salary.

Is this position fully or partially funded through Sponsored Programs Administration? – **required** – answer Yes or No.

Is this position funded through the Office of the Provost? – **required** – answer Yes or No.

Justification for Selection of Candidate – **required** – provide detail and specific reasons as to why candidate is uniquely qualified for this position. If applicable, how does this meet your department's diversity plan?

Job Change Reason Code – **required** – select appropriate job change reason from the drop-down menu.

Start Date – **required** – the first day of work for the selected candidate.

Effective Date – **required** - the first day in the pay period in which the Start Date occurs.

End Date – required if this is a contract position.

Factor and Number of Pays fields – required if this is a contract position. Chose “None” for Tenure or Tenure Track faculty.

Employee's Building/Room – **required** – if you know the building and room number the new employee will be working in, you may enter it here. This information will populate over into the BSU People Directory.

Employee's Phone – **required** – if you know the telephone number for the new employee, you may enter it here. This information will populate over into the BSU People Directory.

Supervisor's Position Number – **required** – the position number of the employee that will be supervising this position.

Time Sheet Org – **required** – the organization number that performs time sheet approval for this position.

Supervisor Certification – **required** - the Chairperson/Administrative Head of the department needs to certify that the work experience, employment, references, and education requirements have been met, as well as indicate if this candidate will be working with minors (keep in mind that this does not include working with students who are officially enrolled in classes or activities who are age 17 and above), and if the employee will be physically working outside the state.

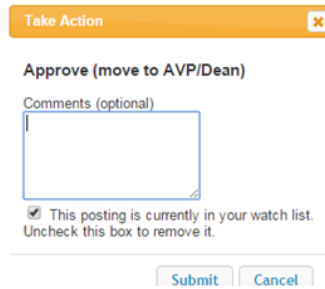
9. Hiring Proposal Documents – optional – can be used if there has been A FOAP change since the position was posted or for any additional information that subsequent approvers should know, such as a waiver or Recommendation for Unusual Appointment. To attach a document, click on the Actions button and select appropriate action.

Document Type	Name	Status	(Actions)
FOAP Changes			Actions ▼
Other			Actions ▼
Recommendation for Unusual Appointment (For Faculty only)			Actions ▼
Waiver (For Faculty and Professional use)			Actions ▼

10. The Hiring Proposal Summary allows you to review the hiring proposal and make any necessary edits before you take action on it. Once all fields have been checked and the required fields completed, click on Take Action On Hiring Proposal. You can either keep it at your stage of the workflow if you are waiting on additional information or you can move it to the next workflow state for approval.

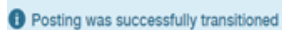
- Take Action On Hiring Proposal ▼
- Keep working on this Hiring Proposal
- WORKFLOW ACTIONS
- Submit (move to Chair/Director)
- Submit (move to AVP/Dean)
- Submit (move to Preliminary Budget Review)

11. You will receive a Take Action pop up window which will send an email in Outlook to the next approver to notify him/her an action is pending. Please note, comments will be tied to the historical record of this action. Check the box to include the action on your watch list and then click Submit.



The image shows a 'Take Action' pop-up window. At the top is an orange header bar with the text 'Take Action' and a close button (X). Below the header, the text 'Approve (move to AVP/Dean)' is displayed. Underneath is a label 'Comments (optional)' followed by a large, empty text input box. Below the input box is a checkbox that is checked, with the text 'This posting is currently in your watch list. Uncheck this box to remove it.' At the bottom of the window are two buttons: 'Submit' and 'Cancel'.

12. If the action was successful, you will see a blue bar indicating the “Hiring Proposal was successfully transitioned.”



A light blue horizontal bar containing an information icon (i) and the text 'Posting was successfully transitioned'.