MICHIGAN STATE
U N I V E R S I T Y

Applicant Tracking System's Training
Staffing Coordinator Guide for Faculty & Academic Staff and Executive Management Positions

Updated March 2022

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STAFFING COORDINATOR OVERVIEW

The Applicant Tracking System, PageUp, provides a set of tools for managing job postings and applicant information. In addition, interviews and other events can be scheduled, offers can be initiated and tracked, and employee onboarding can be managed, all in one location during and after the hiring process. It provides oversight into the numerous organizational units in each area and it empowers teams to organize and monitor a large volume of postings and applicants.

The Primary Staffing Coordinator will have the main responsibilities of a job posting and by default, will receive all system-automated emails. Backup Staffing Coordinators will perform many of the same tasks as the Primary Staffing Coordinator; however, those tasks may be accessed differently. Those will be noted throughout this guide.

Staffing Coordinators can complete the following tasks within the Applicant Tracking System:
- Review and manage job postings and their statuses
- Manage and communicate with applicants
- Schedule interviews and other events
- Check applicant's references
- Make offers
- Manage employee onboarding tasks

For consistency within MSU, we will use the term **Applicant Tracking System (ATS)** as the name of our system for recruiting and hiring. The software is called PageUp. These terms may be used interchangeably; however, all training materials will reference the ATS.

HIRING PROCESS OVERVIEW

1. Complete a Position Request Form in EBS.
    *   The Position Request Form will route for department approvals first and end at MSU HR.
    *   Once MSU HR has approved the form, the posting will be finalized by the HR Analyst in the ATS. The Primary Staffing Coordinator and Staffing Coordinator Backup 1 on the posting will receive an email notification when the posting is accessible within the ATS.
    *   The posting will open for application submissions based on information entered on the form.
2. Review applications as they are submitted.
    *   Applicants that you will not be moving forward in the process should be dispositioned into an *Interview not selected* application status in the ATS.
3. Conduct Phone/Skype interviews, if desired.
    Note: Executive Management positions must obtain interview list approval for all interviews, including Phone/Skype Interviews. Reference step 5 for further details on this approval.
4. Recommend candidates for onsite interview.
    *   Change applicant statuses into *Recommended for Interview – Onsite* or *Recommended for Interview – Alternate*.
5. Obtain interview list approval.
    *   Fill out the FAS Interview List Approval Form and obtain signatures from the Dean and Chair.
    *   Upload the signed form to the *Documents* tab of the Job Card.
    *   Send the applicant list to the Office for Inclusion and Intercultural Initiatives (I3) through the ATS by changing the statuses of all applicants recommended for interview into *Interview List Sent to Compliance Panel*. You must also change the job status to *Compliance Review* in order for I3 to receive the interview list. Once approved by I3, staffing coordinators will receive an email notification.
6. Conduct interviews.
    *   Once interviews are complete, change the application status to *Interview 1 Completed* (or *Interview 2 Completed*) in the ATS. Enter the interview date on the **Confirm status change** page next to Interview 1 (or Interview 2).
7. Select a candidate for hire and make the offer to that individual.
8. Complete a Hiring Recommendation for the candidate in the ATS by changing the candidate's application status to *Hire Recommendation*. Upload the final, signed offer letter to the Hiring Recommendation.
9. Send the signed offer letter to the candidate through the ATS by changing the applicant status to *Offer made online*.
    Note: The candidate must "accept" the offer through their Applicant Portal in order to initiate the Onboarding Portal. **Do not** change the application status into *Offer accepted* on behalf of the candidate.
10. Disposition all candidates who were not selected into the appropriate application status.
11. Complete the Appointment Form in EBS.

FACULTY & ACADEMIC STAFF

Initiating Position Request in EBS

The ATS will NOT be used for the Position Request. It will continue to be submitted via the Position Request form in EBS.

Security Roles

The process for posting a position begins in the HR/Payroll System and moves to the ATS. There are different security roles for each.

• HR Unit Administrator – For Faculty & Academic Staff positions, use the Academic Position Request link in the EBS Portal.

• Staffing Coordinator – Manages the postings once in the ATS, which is linked from the EBS Portal.

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POSITION REQUEST GENERAL NAVIGATION

Saving the Form

Save a draft at any time by clicking **Save Draft**. The draft is not saved until the window is closed.

Note: It is recommended to save a draft of the form rather than simply closing the window. This will save the entered information.

- When initially creating the form, the Save Draft functionality ONLY commits the information that has been entered IF the window is closed. It does not protect the information from being lost if the 30-minute timeout is reached. Once the draft is opened again from the HR/Payroll Inbox, the **Save Draft** button does commit changes every time it is pressed.

Navigating the Form

Move through the steps in the process using buttons at the top of the screen. Click **Next** to validate the information on the screen and advance to the next step.

- If a yellow or green system message is received, click **Continue** to acknowledge the message and advance to the next step.
- If a red system message is received, the error on the page must be corrected before moving on to the next step.
- Select the **Previous** button to go back to the previous screen.
- There are two alternate ways to navigate through the form. These may be helpful if the form is started but not all required information is available.
  - Select any step in the Navigation Bar (*e.g.,* Cost Distribution) to go directly to that section.
  - Go directly to the Summary step and enter all the information on one screen.
- All validation occurs after selecting the **Check** button on the *Summary* screen.

Additional tips for completing the form:

- Required fields are indicated with an asterisk.
- Press the <Enter> key after typing information into a field to have the system validate the information.
- Use the <Tab> key on the keyboard to move from field to field.
- When entering a date, the system automatically formats the field.
- To use a search for a field value, press the F4 key after clicking in a field to open the search window, rather than selecting on the button.
- If assistance is needed at any time, please use the **Help** icon when within the form or contact the HR Solutions Center for assistance.

Copying Information into Forms

Information can be copied and pasted into fields from any of the following document formats:

- Microsoft Word (*.doc, *.docx)
- HTML (*.htm, *.html)
- Rich Text Format (*.rtf)

The following formatting for these document types will be maintained when pasted into any field with the following tool bar. This formatting will also appear in the ATS.

- Bold text
- Italicized text

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- Text indents
- Numbered lists
- Bulleted lists
- Heading styles level 1-3

To ensure formatting is applied to the last line being pasted in, make sure to copy an additional line at the last bullet.

Note: Basic formatting is offered as an enhancement to the EBS position request forms. Some users have encountered issues when pasting their formatted content into the forms from another source. Be sure to carefully check formatting on the Review Form page before submitting. If you find formatting issues, you will need to either go back and manually correct spacing within the field(s), or paste your content into Notepad, recopy-paste it into the field(s) and add formatting within the position form.

Entering Information into Forms

Fields can be completed more quickly by using a Personal Value List. Personal Value lists save entries that are most commonly used. Visit https://hr.msu.edu/ebshelp/hrformscostredistributions/PersValueLists.htm for additional information.

In several places information is entered into a table format. These tables load with several rows ready for adding data. More rows can be added if necessary with the **Add Row** button, or deleted if appropriate with the **Remove Row** button.

GETTING STARTED

Upon opening the **Academic Position Request** link, the first page collects initial information needed to present the proper questions on the form.

FAS Approved Position Request

1. Select a **Hiring Process** from the drop-down menu.
   a) A selection of *Post a Position* or Post an or MSUE Position will result in a posting.
   b) If Add *Positions to Posting* is selected, you can add another position to a posted position. For information, go to https://www.hr.msu.edu/ebshelp/z_fes_see_other_fasacademicpositionrequestaro/additional-positions.html
   c) If *Exception* is selected, the position will not be posted. For information regarding exceptions to the posting process, refer to the Faculty & Academic Staff Hiring Process Changes at https://www.hr.msu.edu/ua/hiring/faculty-academic-staff/changes.html.
2. **Desired Posting Date:** Using the current date is advised for the position to be posted as soon as possible.
3. **Do you wish to use an existing position as a template?** Select *Yes* or *No* from the drop-down menu to answer the question.
   a.) If *Yes* is selected, indicate what position to use as a template and click **Validate Position.**
4. Will this be an on-call position? Select Yes or No form the drop-down menu to answer the question.
   a.) If *Yes* is selected: How many total positions are needed?
5. **Does this position have an executive management or management administrative title?** Select *Yes* or *No* from the drop-down menu to answer the question. For further guidance, refer to the Academic Hiring Manual.
   a) If *Yes* is selected, update the **Organizational Unit** field.
6. **Does this position have a paid rank position?** Select *Yes* or *No* from the drop-down menu to answer the question. For further guidance, refer to the Academic Hiring Manual.
7. Enter the Organization code in the **Organizational Unit** field or use the search functionality to locate the correct number.
   a) **Do you wish to post multiple identical positions**? Select *Yes* or *No* from the drop-down menu to answer the question. If *Yes* is selected, indicate how many positions are needed.
8. Vacant positions exist within the selected organizational units. Would you like to reuse one of these positions? Select Yes or No from the drop-down menu to answer the question.
9. Click the **Create Position** button at the top of the screen to continue.

Organizational Assignment

Hiring Process, **Position**, **Desired Posting Date,** and **Primary Organizational Unit** pre-populate based on responses to previous questions.

1. Click the help lookup within each field to search for a **Job** and **Supervisor**.
2. Is this an open rank position? This question will appear when you select a job that can be posted as open rank. Select *Yes* or *No* from the drop-down menu to answer the question. If yes, the job with the highest rank must be selected and used to create the posting.
3. Select the **Reason for Request** from the drop-down menu.
   Note: Any option other than New Position will require Name and/or PERNR for the employee this position replaces.

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4. Search or enter additional department(s) in **Additional Departments 2**, **Additional Departments 3**, **Additional Departments 4** and **Additional Departments 5** as needed if the position is shared with other departments.
5. Enter **Other Ranks/Titles** as needed.
6. Click **Next** to continue.

Enterprise Structure

1. Select the row for the appropriate **Enterprise Structure**. Results are based on previous responses.
2. Make a selection for **Work Contract** (tenure/continuing system, fixed-term, etc**.**).
3. Click **Next** to continue.

Administrative Address

1. Select a **Location ID** which will then pre-populate the address.
2. Enter a **Room/Suite #** and **Phone #.**
3. Click **Next** to continue.

Cost Distribution

1. The *Cost Distribution* screen displays.
2. Enter Employment Percent.
   Note: Position *Cost Distribution* information is provided in order to drive approvals for the position. Detailed funding information is provided on the Appointment Form when the employee is hired.
   a) Search for and select a **Fund**. If a Personal Value List was created in the past, it may be necessary to press F4 to override those personal values.
   b) Type the account number, then press **Enter** after typing it to default the other required accounting information (be sure all account numbers begin with MS).
   Note: At least one account must be listed. Account must be valid, active and allow for paying salaries. It is NOT required that accounts be active until 12/31/9999, therefore allowing for RC accounts or any accounts that have end dates to be used.
   c) If necessary, search for and select other funding elements. If a **WBS Element** (sub- account) does not appear in a row after the account number is entered, this means that there is more than one option for that account. If no sub-account is entered, WBS Element defaults to "NO_SUB-ACCOUNT."
3. Provide either an **FTE Salary** or an **FTE Salary Range** for this position.
   Note: Salary offers that are above the 10% maximum will require justification.

Posting Details

1. Indicate if this is to only be posted internally.
2. Indicate a **Desired Posting Begin Date**.
   a) If this posting is NOT **Opened Until Filled**, indicate a **Closed Date**.
   b) If this posting is **Opened Until Filled**, the posting will not have a close date.
3. Select *Yes* or *No* if you would like to post the salary provided.
   Note: If you select *Yes*, either the FTE Salary single value or FTE Salary Range with text "Salary Commensurate with Experience" will display on the Careers @ MSU website. If you select *No*, only

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the text "Salary Commensurate with Experience" will display in the salary field of the Careers @ MSU website.

Position Description

1. For **Posting Snapshot** enter a one to two sentence summary that will appear on the main page of the Careers @ MSU website.
2. For **Position Summary** and **Qualifications**, enter the text exactly as it should appear in the posting.
   a) Enter a **Working/Functional Title** if desired (e.g., Chairperson, Marketing)
3. For **Required Degree**, select the lowest acceptable degree. Some positions may have a minimum defined. Specify a subject area in the box provided if required.
4. For **Desired Qualifications**, enter the text exactly as it should appear in the posting.
   Select *Yes* or *No* from the drop-down menu if this position involves **Physical Demands**. If *Yes*, summarize the physical demands for posting in addition to completing the required form for MSU Occupational Health.
   Note: Completed forms should be sent to MSU Occupational Health.
5. Select *Yes* or *No* from the drop-down menu if this position involves exposure to **Health Risks**. If *Yes*, summarize the health risks for posting in addition to completing the required form for MSU Occupational Health.

Note: There are tabs within the Position Description section to quickly access the Post Snapshot, Position Summary, Education, Qualifications, Physical Demands, Health Risks and Applicant Instructions. There is also an additional scroll bar for the Position Summary section within this section.

Note: The Position Summary has a tool bar to modify the text within to copy and paste text, modify the formatting of the text and spellcheck the text.

Note: When copying and pasting information into the position summary the following errors may occur. If images are not compatiable the error, "Images should not be pasted" will appear. If the copied text is using headers 1, 2 and 3 the following error will appear, "Error Message Text…The content cannot be pasted with Table, Heading 1, Heading 2 or Heading 3 formatting." To correct the heading error modify your headings to headers 4 and higher.

6. Indicate the **Department website** if desired.
7. Indicate any **Required Application Materials** such as cover letters, curriculum vitae, etc.
8. The **Special Instructions to Applicant** field can be used to provide additional information to applicants. Enter the text exactly as it will appear in the posting.

   Note regarding reference letters: The ATS allows Faculty & Academic Staff and MSU Extension applicants to provide reference names and contact information during application completion. If the applicant is required to provide non-confidential letters of references at the time of application submission, indicate this in **Special Instructions to Applicant**, along with the number of reference letters required.

Reference contact information can also be collected from the applicant later in the search process. If this is the case, note in the **Special Instructions to Applicant** that contact information for references are not required at the time of application.

Committee Information

1. To add *Search/Selection Committee* members, select External or MSU Employee from the User Type drop-down menu.
2. Indicate which committee member is the Chair by checking the box in the appropriate row.
   MSU Employees who serve on the committee are searchable and their name, title and email address will populate.
3. Indicate **Pernr** for Affirmative Action Advocate (search function is available).
4. Indicate **Pernr** for all Staffing Coordinators indicating whether their role is Primary or Backup (search function is available).
5. Is this search being handled by an outside search firm? Select *Yes* or *No* to answer the question.
   a) If *Yes*, indicate the search firm's name.

For specific instructions for working with a search firm, reference the Unit Agency Guide. You may also direct search firm contacts to the Search Firm Agency Guide for instructions on how they can use the ATS.

Advertising/Sourcing Options

1. Select the best options from drop-down menus in **Advertising/Sourcing Options** section.
2. The values available are from the Pure Michigan Job Portal, Inside Higher Ed. and Higher Education Recruitment Consortium (HERC) websites.
3. This information is required even if the position will be posted internally only. Should the posting need to be opened to the public, the information will have already been collected.
4. Search and select **Area(s) of Interest** for the MSU Careers website (look up available, choose as many options as applicable).
5. Choose an appropriate **Work Location**. East Lansing is the default value. If that is not correct click the trash can icon.
6. **Employee Group** and **Full-Time/Part-Time** values will pre-populate based on responses to previous questions.

Attachments

Based on the information provided, the form identifies required attachments and lists them at the top with a checkbox next to each item required. The "general attachment" option may also be selected to upload additional documents. To upload an attachment:

1. Select the **Attachment Type** from the drop-down menu.
   a) Click the **Browse** button to locate and select the attachment.
   b) Click the **Upload** button to attach the file.
2. Repeat this process for each additional attachment.
3. To delete an attachment:
   a) Select the attachment by clicking the check box.
   b) Click the **Delete Attachment** button.

Approvers cannot add or remove attachments. If attachments must be changed, the approver should reject the form back to the initiator.

Summary Form

A summary of all information is displayed for final review and error checking. Review the completed form, making any needed changes to the information. The field **Add Ad Hoc Approver** will insert an approval at the first level of the workflow. To review the completed form, click the **Check** button to have the system perform a final check of the information. Correct any remaining errors.

Review Form

The **Generate PDF** button allows the creation of a paper or electronic version for departmental files*. The PDF version of the form opens in a new window and can be saved or printed. The PDF will continue to be available in the HR/Payroll System for reference later, even after approval.

The form is ready to be sent for approval. Click the **Send** button to route the completed form for approval. A confirmation message displays a process reference number that can be used to track the form.

Note: The Process Reference Number is generated only after being submitted into workflow.

What happens next

1. When the form is complete and has been sent, it will route through workflow for necessary approvals. As the form routes for approvals, approvers can view the form by selecting the **Generate PDF** button. The final approver is HR.
   Note: For detailed instructions on how to access and view the form, visit:
   https://hr.msu.edu/ebshelp/hrpayrollinbox/reference.html
2. Once approved by HR, the information contained in the Position Request will be uploaded to the ATS.
3. The HR Analyst assigned to the posting will verify and finalize the posting details.
4. The Primary Staffing Coordinator and Staffing Coordinator Backup 1 will receive an email when the posting is available in the ATS.
   Note: The Primary Staffing Coordinator should notify the Staffing Coordinator Backup 2 and the Search Committee Members when the posting is available.
5. Continue to the next section for how to access postings and applicants in the ATS.

APPLICANT TRACKING SYSTEM

Access the Applicant Tracking System

1. Login to the EBS Portal.
2. Click on the **Enterprise Business Systems** group.
3. Click on the **Applicant Tracking System** tile.

Note: Be sure to 'Allow pop-ups' for the ATS.

General Applicant Tracking System Navigation

The *Applicant Tracking System dashboard* links to information within the system, as well as a *Main Menu* that can be accessed in the corner of the screen.

Note: If using the *dashboard*, click on the appropriate link to navigate to and complete a task.

MANAGING JOBS

As a Staffing Coordinator, you can manage and track job postings in the following ways:
- Primary Staffing Coordinator:
    - o the **jobs open** link on the *dashboard,* OR;
    - o the **Manage jobs** link from the *Main Menu*. (**Manage jobs** provides the Primary Staffing Coordinator with more functionality.)
- Staffing Coordinator Backup 1 can only access postings from the **Manage jobs** link from the *Main Menu*.
- Staffing Coordinator Backup 2 can only access postings from the **jobs open** link on the *dashboard.*

How to Find Your Jobs – Primary Staffing Coordinator and Staffing Coordinator Backup 1

1. From the *Main Menu*, click **Manage jobs**.
2. The *Manage jobs* screen opens.
3. The *Manage jobs* screen displays assigned job postings and the following information:
    a) Posting number
    b) Job Title (*e.g.,* Research Assistant)
        i. Click the information button to see a quick view of the job posting information. There are additional links here for Notes, Job Preview, Status, HR Analyst details (Owner), Staffing Coordinator details (User) and Applications.
        i. Click the **Job Title** link to go directly to the Job Card. See Job Card in this document for additional information.
    c) Number of Applications: Click the **number** link in the 'Applications' column. The *Manage Applications* screen opens and displays all applicants for this posting. See Manage Applications in this document for additional information.
    d) MAU (Major Administrative Unit)
    e) Department
    f) Subarea
    g) HR Analyst
    h) Job status
    i) Opening Date: Indicates the date the posting advertisement opens
    j) Closing Date: Indicates the date the posting advertisement closes
    k) Sourced: The green check mark indicates when a job is currently advertised and accepting applicants

To the far right of the screen, each job has the following options:

- View/Edit the Job Card – Click the **Edit** ✎ button to open the *Job Card.* See Job Card – Position Info tab in this document for additional information.

- View/Add Notes - Click the **Notes** 🗔 button to open the *Notes* screen. See Job Card – Notes tab in this document for additional information.

- Preview the Job – Click the **Preview** 🔍 button to open the advertised posting text.

- View Applications – Click the **Applications** 👤 button to open the *Manage Applications* screen. See Manage Applications in this document for additional information.

How to Filter the Manage Jobs Screen

1. Results can be filtered by selecting criteria from the *Status* and *Types* drop-down menus.
   ⚠️ If you do not clear your search criteria, it will default the next time you visit the page.

   a) Select current recruitment from the drop-down menu.
   b) Click **Show other search criteria** ➕ Show other search criteria to find additional filtering options. Click **Search** for results to update.
   Note: The **Current recruitment** status is for active postings. The **Non-current recruitment** status is for filled and/or cancelled postings. If you are looking for a position that has been filled, you must search with either the **All** or **Non-current recruitment** status.
   c) Click the **Hide other search criteria** link to hide the additional filtering options.
   d) Click **Clear** to remove all filtering.

How to Find Your Jobs – Primary Staffing Coordinator and Staffing Coordinator Backup 2

1. From the *dashboard*, click the link **jobs open**.
2. The *My jobs* screen opens and displays all jobs assigned to the Primary Staffing Coordinator or Staffing Coordinator Backup 2.
3. The jobs can be filtered using the *Status* drop-down menu to select All, Current or Non-current jobs. Click on the title of the column to sort jobs by:
   a) Position Number
   b) Classification title
   c) Date added
   d) Status
4. Click the **View job** link to open the Job Card. See Job Card for additional information.

JOB CARD

The Job Card (job posting) can be accessed from multiple locations in the ATS. It displays the following tabs:
- Position info
- Notes
- Documents

Users also have the option to View Applications from the Job Card, and view **History** and **Revision History** by clicking on the applicable links.

Job Card – Position Info Tab

The *Position Info* tab displays job posting information, including:
- Job posting number
- Position details (position summary, details, job duties)
- Users:
    - Search Chair and Committee Members
    - Additional Viewers
    - Staffing Coordinators
    - HR Analyst

Important things to note on this tab:
- Search Chair and Committee Members can be added and/or updated as needed. Save the Job Card after members have been added.
- View or modify additional users to view applicant materials.
- View MSU HR analyst assigned to the posting. (Do NOT make changes to the HR analyst.)

Job Card – Notes Tab

The *Notes* tab is used to add a note that is visible by all users in the system.

⚠ Please use discretion as these notes will become part of the permanent hiring record.
1. The *Notes* screen opens and displays already existing notes. **Edit** or **Delete** as necessary.
2. To add a note, select **Note** from the *Add* drop-down menu. The *Add Note* screen opens in a new window.
    a) Enter the necessary information into the Note field.

    b) Add attachments and/or email the note to someone else if necessary.
    c) Click **Save**. The note (and file, if added) will display on the *Notes* screen for all users to view.
    d) To edit or delete an existing note, please contact the individual who created the note.

Job Card – Documents Tab

The *Documents* tab contains documents relating to the job posting. The drop-down menu provides the following options:

- Upload document from a computer.
- Download document templates from the ATS Library.
- Generate a selection report. All users can generate a search/selection report and/or upload documents, with the exception of search committee members and additional viewers.

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Note: **Generate a selection report** allows an opportunity to start creating the final selection/search committee report. A report template will prefill with job and applicant information and additional information may be added as needed. Save the modified version and upload to the *Documents* tab. Alternately, units may upload their own selection report to the *Documents* tab instead of generating the selection report.

To Generate a Selection Report:
1. Select **Generate Selection report** from the drop-down menu. The *Generate selection report* screen opens in a new window.
2. Select an **Application status** from the drop-down menu. The status selected will display the Search Chair rankings of applicants at that status, if rankings have been provided.
3. Choose the appropriate template and click **Okay** to generate the report. Click **Save**.
4. Update the template as necessary and save as a new Word document.
5. See below to add the updated template to the *Documents* tab to share the final report.

To Upload a File:
1. Select **Document from a file** from the drop-down menu. The *Upload a new document* screen opens in a new window.
2. Click **Upload file** and select a file.
3. Make a selection from the *Document Category* drop-down menu.
4. Enter a *Title*.
5. Click **Save and add another** or **Save and close** or **Close**. The added document(s) will display on the *Document* tab for all users to view.

MANAGE APPLICATIONS

There are a variety of methods to view and manage applicant pools for any job posting:
- From the Job Card, click **View applications** in the left corner of the screen (access for all Staffing Coordinators.)

- From the *Manage Jobs* screen, click the **number** listed in the 'Applications' column (access for Primary Staffing Coordinator and Staffing Coordinator Backup.)

- From the *Manage Jobs* screen, click the **Applications** (blue person) button (access for Primary Staffing Coordinator and Staffing Coordinator Backup 1.)

- From the M*ain Menu*, click the **Manage Applications** link (access for Primary Staffing Coordinator and Staffing Coordinator Backup 1.)

Once on the *Manage Applications* screen, use the **Search** tab to identify the job posting to be viewed.
1. To view the list of active applicants (or those who have not been disqualified from the process) check the box next to *Current application statuses only*. This will remove all applicants who are no longer being considered from the position. Click **Search**.

2. The **Results** tab displays the selected criteria, along with the following information:
   a) Job Title
   b) Submitted Date
   c) First and Last Name (click to open the Applicant Card)
   d) Status of each applicant (click to change the application status)
   e) Applicant flags
   f) Additionally, four buttons display on the far right of the screen:
      i. Click the **View Resume** 🖨 button to view the resume/CV in a new window.
         Note: CVs may potentially be uploaded as an additional document.
      ii. Click the **Download Resume** button to download and save to the computer.
      iii. Click the **View Answers** button to view the application answers in a new window.
      iv. Click the **View application** link to open the Applicant Card. See Applicant Card in this document for additional information.

Bulk Actions
The *Bulk Action* function makes it easy to perform an action on one or more applicants at once, such as status update, compiling documents or communication. To perform a bulk action:
1. Group applicants, using the colored checkboxes to the left of their names, to help select and categorize applicants all at once. For example, check the green box next to all applicants to schedule for an interview, the yellow box next to all applicants to disqualify due to education, and the red box next to all applicants to disqualify due to experience.
   Note: These color categories are temporary and will clear if the screen is navigated away from or refreshed. Also, the colors have no inherent meaning of their own. They can be used to classify applicants into whatever groups that are needed.

2. Once the appropriate box has been checked for each applicant, use the *Select a bulk action* drop-down menu to select an action.

For more detail about the function of these bulk actions, see below:

- **Bulk Assign**

  Used to assign applications to any user in the system for review. This may be used when seeking feedback about an applicant from another user. Assigned users will be sent an email notification and receive a notification in the **Applications** button on their dashboard. The assigned user can review the application with the option to approve or decline the applicant. Approving or declining the applicant has no effect on the applicant status or progress, but is for informational purposes only. The assignee can view the feedback (approved or declined) under history on the Applicant Card. Only one user can be assigned to the application at a time. Assigning an application to another user will cancel the previous assignment.

- **Bulk Communicate**

  Used for communicating with applicants. Choose from the available templates and edit as necessary or start from scratch. This function provides the option to set up delayed emails but be careful as these cannot be cancelled once scheduled.

- **Bulk Compile and Send:**

  Used to compile documents of selected applicants into a single PDF. Choose what to pull into the PDF by selecting checkboxes next to relevant information. Once the PDF is generated, download it or email the compiled documents to another user in the system.

- **Bulk Move**

  Used to change the application status of multiple applicants all at once.
  Note: Send emails to applicants if appropriate but avoid sending emails to internal users as part of the bulk move action. Otherwise, they will receive an email for every applicant moved into this status. To send an email to internal users, use **Bulk Move and Send**, as it will eliminate duplicate emails.

- **Bulk Move and Send**

  Used to change the application status of multiple applicants all at once and send application materials to another user in a single email. This bulk action may be beneficial if other users need to be notified of the status change but should not receive an email for each applicant.

- **Bulk Reference Check**

  Instead of using an application status to trigger reference letter checks, there is the option to Bulk Reference Check. This provides the option to select the appropriate reference check form, modify the email that will be sent to the referee, and pick a due date. The ability to modify the email is one benefit of using bulk reference check over using application status.

- **Bulk Send**

  Used to send application materials to another user as separate attachments. For example, if two applicants are selected and the resume/CV and cover letter are identified as appropriate attachments, the user will receive four individual attachments. For most purposes, **Bulk Compile and Send** is a much better way to send materials as it compiles all the documents into one attachment.

3. Once the bulk action is selected, a new window will open with instructions for that specific task. The system allows action to be taken on applicants starting first with the green category, then yellow, then red. The bar at the top shows the color group being worked with.

a) Enter information or choose criteria for the green applicants.
b) Enter information or choose criteria for the yellow applicants.
c) Enter information or choose criteria for the red applicants.
4. Regroup the applicants as necessary and repeat additional Bulk Actions as needed.

Bulk Compile and Send

From the *Manage Applications* screen, view and download all applicant documents in one PDF using the **Bulk Compile and Send** function.
1. Check the box next to the name of all applicants to include in the PDF.
2. Select **Bulk Compile and Send** from the drop-down menu.
   Note: Bulk Compile and Send does not send the document automatically but does provide the option to send via email once generated.
3. Select all documents to include and click **Create PDF**.
4. Choose to download the PDF or send to others for review.
   ⚠ MSU has limitations on attachment sizes. Please be aware, users may have limitations on the size of attachments that may be shared.
   a) Download the PDF: click the **Download Document** link to open the PDF or right-click on the link to save in a folder.
5. Send the PDF to others for review: Enter information in the email form and edit as needed.
6. Click **Okay** to send the email and return to the *View Applicant* screen.

Applicant Card

The Applicant Card displays the following information (see full screenshot below):
1. Applicant Profile
2. Applications
3. Under the *Applications* heading, click **Form** and/or **Resume** to view applicants' answers and resume/CV information.
4. History
   Note: Filter History by selecting criteria from the *Item* and *Job* drop-down menus. The filter is automatically applied when selected and the information below is updated. The **History** section can show users important information about the applicant and actions taken during the process, including the following:
   a) **Item: Notes:**
      i. Status changes and who changed the status.
      ii. The reason the applicant provided when declining an event booking or offer.
   b) **Item: Bookings:** Details of event bookings
   c) **Item: Communication:** Emails that have been sent to the applicant
   d) **Item: Documents:** Documents associated with that application (i.e. Resume/CV, reference letters, offer contracts)
5. Click the **Print** 🖨 button in the top right corner to print the application.

CHANGING APPLICANT STATUSES

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Application statuses can be changed individually or using bulk actions. Refrain from using bulk actions for the following statuses, as information specific to that applicant must be captured on an individual basis:

- **Interview 1 Completed:** Interview date must be entered
- **Interview 2 Completed:** Interview date must be entered
- **Hire Recommendation:** Triggers the Hiring Recommendation for the applicant

Certain applicant statuses will send an email notification to the applicant through the ATS. You can view the full list of these email notifications on the Applicant Status Emails tip sheet on the HR website at https://www.hr.msu.edu/ua/pageuphelp/documents/applicant-status-emails.pdf. To view which email notifications can be modified and which are sent automatically, see the Application Statuses and Email Notifications tip sheet on the HR website at https://www.hr.msu.edu/ua/pageuphelp/documents/applicant-emails-tip-sheet.pdf.

Changing an applicant status individually

1. To change a status individually, click on the **Status** link for the applicant on the *Manage Applications* screen or within the Applicant Card.
2. Select the appropriate **Application status** from the *Change application status* screen and click **Next**.
3. The *Confirm Status Change* screen displays. See the Confirm Status Change section for next steps.

Changing an applicant status using *Bulk Action*

1. Group applicants using the colored checkboxes to the left of their names to help select and categorize applicants all at once. For example, check the green box next to all applicants to schedule for an interview, the yellow for all applicants disqualified due to education, and the red for applicants disqualified due to experience.
2. Once the appropriate box has been checked for each applicant, select **Bulk Move** from the drop-down menu.
3. Select the appropriate status from the drop-down menu and click **Next**.
4. The *Confirm Status Change* screen displays. See Confirm Status Change for next steps.

Confirm Status Change

The *Confirm status change* screen may contain important guidance information, which will be denoted by the triangle symbol.

Pay close attention to these as they may provide reminders about necessary approvals that need to take place prior to proceeding. For example, for Faculty & Academic Staff postings, information is provided about the required interview list approvals.

This screen will also provide the user with a variety of options. These options will differ based on the type of application status selected. Read on to learn about all possible options:

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1. Send an email to applicants and/or customize the email template that displays.
    a) Many applicant statuses are set up with standard email templates that will display when putting an applicant into a status. The purpose of the emails is to keep the applicant up to date on where they are in the process. The email templates can be sent as is or modified, with the exception of merge fields:
        i. The email templates often include merge fields that will pull in information from the job posting so it does not have to be manually entered. Merge fields can be identified by looking for words that display in all caps and are surrounded by brackets. (Ex: {FIRSTNAME} {LASTNAME}). Merge fields cannot be modified, but can be removed from the email if desired.
    b) If you do not wish to send an email to the applicant, selecting the **No** radio button at the top of the email will turn off this communication. Conversely, if no template has been provided and you would like to send an email, the **Yes** radio button will allow the user to create an email from scratch or select from one of the communication templates provided in the drop-down menu.
    c) There is also the option to delay the email from being sent to applicants from one hour up to 30 days.
        ⚠ Take caution when utilizing this feature, as this email cannot be modified or cancelled after selecting **Move now**, which officially changes the application status.
2. Send an email to internal users.
    a) There is an option to email other users in the ATS. This may be used to update someone on where the process is, or send materials to another user.
        Note: If using **Bulk Move**, the users will receive a separate email for each applicant. To avoid sending multiple emails, use **Bulk Move and Send**.
    b) Select a user listed on the Job or Offer, or search for someone in the system using *Other additional users* search function.
3. Enter interview date (when changing applicants into *Interview Completed* application statuses.)
    a) To enter the interview date, scroll down to the *Status* table. Enter the interview date in the **Date occurred** field.
    Note: Interview dates must be entered for applicants on an individual basis. Do not use **Bulk Move** when changing applicants into the *Interview Completed* application status.
4. Select reason (if candidate is being placed into an unsuccessful status.)
    a) Unsuccessful statuses require a 'reason why' the applicant is no longer being considered for the position. Choose the most applicable reason from the drop-down menu.
5. Change the job status
    a) When changing an applicant status, a prompt may display, for certain statuses, to update the *Job Status* at the bottom of the window.
        i. Scroll to the bottom of the page. If being prompted to update the job status, select **Yes**. This will update the posting status automatically and is important for reporting.
        ii. Click the **Move now** button.

INTERVIEW APPROVAL PROCESS

For Faculty & Academic Staff positions, the applicant pool and interview list must be approved prior to scheduling and conducting **final** interviews. For Executive Management positions, the applicant pool and interview list must be approved prior to scheduling and conducting **all** interviews (*e.g.,* phone, video and Skype.) Approval must be obtained by:

- Chairperson/Department Head
- Dean/Vice President
- Compliance Panel (Office for Inclusion and Intercultural Initiatives or I3)

Step 1:
Identify the interview list by placing the appropriate candidates for interview in one of the following application statuses:

- *Interview Recommendation – Onsite*
- *Interview Recommendation – Alternate*

Step 2:
Obtain Chairperson and Dean approvals via the Academic Final Interview List Approval Form on the HR website at https://www.hr.msu.edu/ua/hiring/documents/Academic_Interview_List_Approval_Form.pdf.

Note: This form is provided when changing the applicants into the *Interview Recommendation* statuses.

The Academic Final Interview List Approval Form does accommodate electronic signatures, but the form can also be printed to obtain wet signatures. Once signatures have been obtained, upload the signed form to the *Documents* tab of the Job Card.

1. On the Job Card, click on the *Documents* tab.
2. From the *Select* drop-down menu, choose **Document from a file.**
3. The *Upload a new document* window will display.
    a) Click the **Upload file** button to upload the signed form.
    b) Ensure that the selected document category is *Interview Approvals*.
    c) Enter a Title for the document.
    d) Click the **Save and close** button.

Step 3:
You must complete the following steps to get your job approved by I3. Send the interview list to Compliance Panel (I3) for approval:

1. Use **Bulk Move** to change all applicants in an *Interview Recommendation* status to the *Interview List Sent to Compliance Panel (Compliance Panel Review)* application status. Click **Next.**
2. On the following page, update the job status from *Interview* to *Compliance Review* by clicking on the **Yes** button.
3. Click the **Move now** button. Note: If you do not do this step, I3 will not be able to view your interview list.

Once the interview list has been approved by I3:

- The staffing coordinators will be notified via email that I3 has approved the interview list and they may proceed with scheduling and conducting interviews.

- The applicants on the interview list will be in the *Interview Approved by Compliance Panel* application status.
- The job status will be *Interview.*

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EVENTS (OPTIONAL FUNCTIONALITY)

The event function in the ATS is used to schedule phone screens and interviews for applicants. The event must first be created, and internal users can be added to the event at this time. Once the event is created, you can then invite applicants to the event via email.

Note: Only a Primary Staffing Coordinator and Staffing Coordinator Backup 1 have the ability to create events for the job.

Create a New Event

1. From the *Main Menu*, click on **New Event**.
2. The *New Event* screen opens and displays the *Event details* form.
3. Fill in the following fields:
   a) Title
      Note: It is recommended to include the posting number in the title of the event.
   b) Event Type – select video/phone screen or interview
      Note: Orientation (MSU HR) is listed for MSU HR only.
   c) Venue -- the location where the event is being held.
      i. Add manually by the user.
         OR
      ii. Use the binoculars to search or add a new venue.
   d) Job – connect the event to a specific job; use the binoculars to filter and search.
   e) Owner – enter the name of the Staffing Coordinator who will be managing the event information, timeslots and scheduling of applicants.
      Note: The owner of the event can be changed in case of emergency by the current owner or the Dean/VP or Dean/VP Delegate through the *Manage Events* page.
   f) Add event to owner's dashboard – select the **Yes** radio button for notifications to display on the dashboard.
   g) Contact name
   h) Public instructions – use for special instructions for the invitees to attend; the invitee can reference the instructions after they have accepted the invitation in their Applicant Portal.
      Note: Documents cannot be attached here; however, the user does have the option to attach a document to the email that is sent to the applicant when scheduling/inviting them to the event later in the process.
4. Click **Save** to save the event and move on to creating timeslots for the event.
   Note: As soon as **Save** is clicked, the screen changes from *New Event* to *Edit Event*. Event details can be edited on this screen and timeslots can be entered. See Create Timeslots for the Event for additional information.

Create Timeslots for the Event

1. From the *Edit Event* screen, the *Time slots* form displays.
2. Add bulk timeslots OR add a single timeslot.
3. To *Add a single timeslot*:
   a) Enter Event Date, Start time and End time.
   b) Click **Invite** to invite internal users to the event. (ex: Staffing Coordinators)
      i. Invitees can be listed in all timeslots or assigned one.
      ii. Invitees will receive a notification on their dashboard and can monitor who has been booked into each timeslot by clicking the **scheduled interviews** link.
4. Enter the number of positions for each timeslot. For a single interview, enter 1. For a group interview, enter the number of applicants that can be booked into one timeslot.
5. Click **Add** to add the timeslot to the table below.
6. To *Add bulk timeslot:*
   a) Click **Add**. The *Bulk add timeslots* screen opens.
7. Enter From and To dates.
8. Check the boxes for applicable days of the week.
9. Enter Start time and End time.
10. Enter the number of positions for each timeslot. For a single interview, enter 1. For a group interview, enter the number of applicants that can be booked into one timeslot.
11. Click **Invite** to invite internal users to the event.
    a) Invitees can be listed in all timeslots or assigned one.
    b) Invitees will receive a notification on their dashboard and can monitor who has been booked into each timeslot by clicking the **scheduled interviews** link.
12. Click **Add** to add the timeslot to the table.
    Note: Click **Edit** or **Remove** to make changes or delete the timeslot if applicable.
13. Select from the *Remind applicants* drop-down menus to send an automatic email reminding applicant of their scheduled timeslot.
    a) Select the **Yes** radio button if setting a reminder.
14. Select the **Yes** radio button to send an email to internal users invited to the event.
15. Click **Save** to save the Time Slots or click **Save & Exit** to return to the *Manage events* screen.

Invite Applicants Using Bulk Move

Once events have been created and scheduled, multiple applicants can be invited to the event by using the "Bulk move" function.

⚠ Required approvals must be acquired from the appropriate groups (Chair, Dean, I3) prior to scheduling interviews for Faculty & Academic Staff postings.

1. From the *Main Menu*, click **Manage Applications**.
2. Use the *Search* tab to identify the job posting to be viewed. Enter or select the necessary information and click **Search**.
3. The *Results* tab displays the selected criteria.
4. To invite multiple applicants at one time, select applicants using the checkboxes to the left of their names. Complete steps 5-10 for each individual's timeslot.
5. From the drop-down menu at the top of the screen, select **Bulk move**. The *Bulk move* screen opens in a new window.
6. From the *Application status* drop-down menu, select **Phone Screen Scheduling** or **Interview Scheduling**. Guidance information is displayed. Please review and follow guidance as applicable.

7. Choose the radio button **Select an event** for the applicant.
   a) Click on the binoculars to search for the event.
8. Allow the applicant to choose the timeslot.
   a) If selecting a timeslot on behalf of the applicant, choose the radio button to **Select a timeslot**. If the applicant has accepted the timeslot outside of the system, you can choose the **Yes** radio button to **Accept the booking on behalf of the applicant**. The applicant's application status will then be updated.
9. Email the applicant the event information. Email content may be edited using one of the following:
   a) Review the email template provided and edit/modify as desired.
   b) Choose a different template by selecting the **Communication template option** in the drop-down menu.
   c) Staffing Coordinators also have the option to add attachments to the email (directions, parking instructions, etc.)
      i. To add an attachment, click on the *Tools* drop-down menu and select **Insert Document**.
10. Click **Move now** to change the status and complete the invite. A confirmation message will display.
11. If additional applicants were chosen in step 4, repeat steps 5 through 10. Repeat until all applicants have been assigned.

The applicant can choose to decline the invitation, withdraw from a timeslot, or change the scheduled timeslot (if other available timeslots remain) up until 48 hours prior to the event.

Once an applicant accepts or declines, their application status will automatically change to 'accepted by applicant' or 'declined by applicant' and the Staffing Coordinator will receive email notifications. A confirmation email will be sent to the applicant once a timeslot is selected.

Manage Events

1. From the *Main Menu*, click **Manage events**.
2. The *Manage events* screen opens and displays three tabs: *Calendar*, *Events* and *Timeslots*. Columns on the events and timeslots grids can be filtered by selecting the title of each column. This can help group the information if desired.

The *Calendar* tab displays a calendar with all scheduled events by day.

1. Click the **Show Search Criteria** link to enter criteria and find a specific event. Click the **Hide search criteria** link when finished to collapse.
2. Click the event within the calendar to display two options: View bookings and Edit event.
   a) Click **View bookings**. The *Manage bookings* screen displays event details, booking information and status of that booking.
      i. Click the **Back to manage events** link to return to the *Manage events* screen.
         OR
      ii. Click the **Print bookings** link to open a print dialogue.
3. Click **Edit event** to make any changes to the event. The *Edit event* screen opens. Make changes as necessary. Click **Save and Exit** to return to the *Manage events* screen.
4. At the top of the *Calendar* tab, three links are available to create a New Event, Print events and Print events with bookings. Click the links as applicable.

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The *Events* tab displays scheduled events by Event title.
1. From the *Status* drop-down menu, select **Active** or **Archived** events to display. The table automatically updates with the selection.
2. Click the **Show Search Criteria** link to enter criteria and find a specific event. Click the **Hide search criteria** link when finished to collapse.
3. Click the **Edit** link to navigate to the *Edit events* screen. Make changes as necessary. Click **Save and Exit** to return to the *Manage events* screen.
4. Click the **Archive** link to Archive completed events.
5. Click the **New event** link to create a new event.

The *Timeslots* tab displays the events, the timeslots associated with those events and detailed information about each timeslot.

Note: For interviews that are required, every attempt must be made to schedule an interview.

1. From the *Status* drop-down menu, select Active or Archived events to display. The table automatically updates with the selection.
2. Click the **Show Search Criteria** link to enter criteria and find a specific event. Click the **Hide search criteria** link when finished to collapse.
3. Click the **Bookings** link to open the *Manage bookings* screen. The *Manage Bookings* screen displays event details, booking information and the status of that booking.
4. Click the **Edit timeslot** link to open the *Edit time slot* screen. Make changes as necessary.
5. Click the **Edit** link to open the *Edit event* screen. Make changes as necessary.
6. Click the **New event** link to create a new event.

REFERENCES

Request Reference Contact Information

Non-confidential letters of reference can be attached by the applicant. If reference letters are not required at the time of application submission, you can request reference contact information from applicants later in the process.

⚠ If you do not require references at the time of application, you are responsible for triggering the request for reference letters within the ATS.

To request reference contact information from applicants:
1. Access the applicant list from the *Main Menu*, by clicking on **Manage Applications** or through the Job Card, by clicking on **View Applications.**
2. Use the *Search* tab to identify the job posting and/or applicant to be viewed. Enter or select the necessary information and click **Search**.
3. The *Results* tab displays the selected criteria.
4. Use **Bulk move** to request references from one or more applicants.
   OR
   Click on the applicant's **Status.**
5. The *Change application status* screen opens in a new window. Select **Reference contact information requested** from the Application status drop-down menu.
6. Click **Next**. The *Confirm status change* screen opens in a new window.
7. Enter the number of references required in the email template; up to six may be entered.
8. Click **Move now**.
9. References can be viewed through the Applicant Card by clicking on **View References**.

Manually Entering Reference Contact Information

If contact information for the references are not provided on the application, you can manually enter the referee information to the applicant's record.
1. On the Applicant Card, click on the *Actions* in the second drop-down menu listed next to the application.
2. Click **View references** from the drop-down menu.
3. At the top of the screen, select **New** to manually create a new referee.
4. Enter in the referee information. Click **Save**.

Invite Referees To Conduct Reference Letter/Reference Check

You can request reference letters and letters of recommendation at any point in the hiring process. Reference letters and reference check forms that have been submitted through the system can be compiled with all other application documents using **Bulk Compile and Send.**

There are two ways that you can trigger reference checks:

Option 1: Bulk Reference Check.
Staffing Coordinators may want to use **Option 1** if they would like to:
- Set the **expiry date** or deadline by which the reference check must be completed.
- Select the type of reference check form to be sent to the referee.
- Customize the communication that is sent to the referee with department contact information or guidelines for writing the reference letter.
- Attach a custom department questionnaire to the email. The referee can then complete the custom questionnaire and upload against the reference check form.

Option 2: Change application status to *Reference Letters Requested*.
Staffing coordinators may want to use **Option 2** if no customization is required to the default settings. Default settings are shown below. Note: Using Option 2 to change the applicant status to Reference Letters Requested will override Option 1. If Option 1 was already completed, another email will be sent to the referee with a 30-day due date. This option is a way to request letters via applicant status but should not be used to track which applicants had reference letters request sent.
- Reference Check Form is based on the position type. Faculty, Academic Staff and Executive Management positions by default receive the **Faculty – Letter of Reference** form.
- Expiry date is set to 30 days. You can reinitiate the email request if the expiry date has passed.
- Standard email communication is sent. Point of contact provided is the HR Solutions Center.

Option 1: Bulk reference check.
1. Check the box next to all applicants whose referees you would like to contact.
2. Select **Bulk reference check** from the drop-down menu.
3. Select the **invitation expiry date**. The expiry date determines how long the referee has to complete the reference check. The expiry date is included in the email to the referee. Once expired, the referee will not be able to submit their response. You can reinitiate the email request if it surpassed the expiry date.
4. Select the **Faculty – Letter of Reference** form. Referees are asked to upload a letter of reference.
5. Modify email to be sent to referee. To add an attachment or custom questionnaire, select **Insert Document** form the Tools drop-down menu.
6. Click **Finish** to send invitation to referees.

Option 2: Change application status to *Reference Letters Requested*
1. The application status can be changed individually by clicking on the status or using **Bulk move**.
2. Once the *Change application status* screen opens in a new window, select the **Reference Letters Requested** status.
3. Click **Next**.
4. The Confirm status change screen opens in a new window.
5. Click **Move now**.

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Once requests are sent, referees will be directed to the Reference Portal, where they will fill out the reference check form or upload a letter of reference.

Uploading a Confidential Reference Letter

To upload a confidential reference letter for an applicant in the ATS:
1. Click on the applicant name to open the Applicant Card.
2. Click on the Actions from the second drop-down menu next to the appropriate application.
3. Click the **Add document** link.
4. Click on the **Upload file** button to upload the document.
5. Select **Reference Letter** from the drop-down menu.
6. Enter a title.
   Note: Be sure to include the name of the referee in the title.
7. Click **Save and add another** to upload another reference letter or **Save and Close** to close the window.

Non-Confidential Reference Letter

Non-confidential reference letter can be uploaded by the applicant during the application process:
1. The unit should add instructions to the Special Instructions to Applicant to inform the applicant of the process for non-confidential reference letters. Include the number of reference letters required. Instruct the applicant to attach the reference letters under the Other Document option within the application procees.

Manage Reference Check Requests

The *Manage Reference Check Requests* screen allows you to view and manage the status of reference checks. You can access this screen via the *Main Menu*.

To manage reference checks for a single applicant at a time, this is best managed from the Applicant Card. Select **View References** from the *Actions* drop-down menu to open the *Manage References* screen for the applicant. From there:

- Send requests to referees
- Resend requests
- View references and answers
- Add references
- Control the reference check account and upload a letter on behalf of referee if required
- Send a reference check from the Applicant Card

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OFFERS

For Faculty & Academic Staff and Executive Management, the Hiring Recommendation (also referred to as the Offer Card) is utilized simply to record the final hire and to initiate a chain of events to activate their Onboarding Portal. The offer is not made through the ATS. To complete a Hiring Recommendation and initiate onboarding for the hire:

1. From the *Manage Applications* screen, click on the **current status** in the Applicant Grid.
2. The *Change application* status screen opens in a new window. Select **Hire Recommendation**.
3. Click **Next**. The *Confirm status change* screen displays.
4. Scroll down to the bottom of the page and select the **Yes** radio button to update the job status to *Hiring Recommendation*.
5. Click **Move now**. The *Hiring Recommendation* screen will open in a new window.

The Hiring Recommendation screen includes the following sections:
- Personal details
- Job details
- Hiring Recommendation
    - Approval Status
    - Position Details
    - Salary
    - Pre-Employment Checks
    - Onboarding
    - MSU HR Analyst
    - Offer Acceptance Status
- Offer Documents
- Approval process

1. Under the *Position Details* section, add the following required information:
   a) Hours per week
   b) Start date – must be a minimum of 14 days from the acceptance of the offer
   c) Offer type – select Faculty & Academic Staff
   d) Hire action
   e) Reason candidate was selected
2. Under the *Salary* section, enter the Full-Time Equivalent Salary.
3. Under the *Onboarding* heading, add the following information:
   a) Supervisor
   b) Onboarding Delegate 1 (Optional)
   c) Onboarding Delegate 2 (Optional)
      Note: The Onboarding Delegate 2 will not receive email reminders regarding incomplete onboarding tasks.

      ⚠ Supervisor and Onboarding Delegate users will have access to the new hire task list and are responsible for ensuring the hire and the unit complete all assigned tasks. Therefore, Supervisor and Onboarding Delegate selections should be made appropriately.
   d) Select the appropriate Data Collection Form for FAS/Exec Mgmt.
   e) Select the appropriate Onboarding Task List for Faculty & Academic Staff/Executive Management.

Note: Verify the correct Onboarding Task List is selected as it drives the standard list of tasks the new hire will be required to complete. The Onboarding Task List can be highly customized to meet unit and departmental onboarding needs after the selection is made. View the Onboarding Portal Guide for further information.

4. Under the *Offer documents* section, upload the final, signed offer letter or signed fixed-term memorandum.
Note: If you do not attach an offer letter to the Hiring Recommendation, you will receive an error message and may not be able to change the application status to move forward in the hiring process.

5. Under the Approval process section, you are not required to select an approval process; however, you have the option to use this function for acquiring departmental approval. View the Offers that Require Department Approval section in the Appendix for approver instructions.

6. Click **Save and Close**. The *Hiring Recommendation* screen will close and you will be returned to the *Manage applications* screen.

   Note: If you selected an approval process, a pop-up message will appear notifying you of the approval process you have selected to initiate. Click **OK** to proceed.

7. Change the application status to *Offer made online*. A customizable, system-generated email will be sent to the hire directing them to accept the offer to activate their Onboarding Portal. The selected candidate must log on to their Applicant Portal to acknowledge their acceptance of the offer.

   ⚠️You should not change the application status to *Offer accepted.* The hire must acknowledge their acceptance through their Applicant Portal to initiate their Onboarding Portal.

8. Once the hire acknowledges their acceptance:
   a) The hire's status will automatically change to *Offer accepted.*
   b) The staffing coordinators, supervisor and HR Analyst listed on the Hiring Recommendation will receive an email notifying them that the hire acknowledges acceptance of the offer.
   c) The hire will be redirected to a new screen with a welcome message and information about their personalized Onboarding Portal. The hire must click **Submit** to activate their Onboarding Portal.

9. When the hire activates their Onboarding Portal, their application status will be automatically updated to *Hire documentation completed.*

Monitoring or Managing All Offers

There are multiple ways to access or monitor offer information once the offer has been submitted:
1. From the Job Card in the **Headcount Management** section.
2. Through the *dashboard*, via the **My New Hires** link to view offers for which the user is assigned as the Supervisor, Onboarding Delegate 1 or Onboarding Delegate 2.
   o The *My New Hires* screen gives an overview of all hire actions a user has access to.
     ▪ You can filter this grid by columns to group hires (e.g., by status, by posting, candidates in alphabetical order).
     ▪ From this screen, you can access the Applicant Card and the Hiring Recommendation and monitor onboarding tasks.
3. In addition, you can view the Hiring Recommendation from the Applicant Card once submitted by selecting the Hire Recommendation status.

Requesting a Criminal Background Check (CBC)

When to Request a CBC

After the applicant accepts an offer of employment, staffing coordinators will receive an email that it is time to request the CBC.

- **Faculty/academic staff postings**: the CBC should be requested after the applicant has been placed in the application status of "Hire documentation complete."
- **Temporary/on-call (non-academic) staff postings**: the CBC should be requested after the applicant has been placed in the application status of "Draft Hire Form Created in EBS."
- **Support staff or extension**: The HR Analyst will request the CBC for support staff or extension postings after the applicant has been placed in the application status of "Hire documentation completed."

Request Background Check and Select Package

1. Once the candidate has progressed through the appropriate application statuses the CBC can be initiated.
2. Change the application status to "Request background check" and click "Next."
   a. If you would like to request a background check for multiple applicants at the same time:
      i. Select the check box next to each applicant you'd like to request a background check for.
      ii. Select "Bulk move" from the "Select a bulk action" dropdown menu.
      iii. **Change the application status to "Request background check" and click "Next."**
   Note: **When requesting multiple background checks, the same package will be used for all applicants.**

3. Select the appropriate package from the "Background check" dropdown list.
   a. You must select a package that you have access to in HireRight.
   b. If you select a package that you do not have access to in HireRight, the background check will not be requested, and you will receive an error notification stating "User not found" for the selected package.
   Note: A warning message, "Existing background check found. Are you sure you wish to continue?" may appear. Please reach out to the HR Analyst before proceeding.

4. Once the appropriate package has been selected, review and/or modify the email to the applicant about the upcoming invitation from HireRight (if desired).
   a. If an applicant was submitted by an agency/search firm the email will need to be changed from the agency email to the applicant email by the HR Analyst before the criminal background check request is made.
      i. This applies to 274 temporary/on-call postings as well.
5. Select "Move now."
   a. If a mistake was made, you received an error or you need to cancel the background check, please contact your HR Analyst.
   b. Once the CBC has been requested:
      i. Refrain from making any application status changes to the record in question until after the CBC is complete.

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    ii.   Application statuses can be updated for applicants who do not have a CBC in progress.

    iii.   HireRight will send a CBC invitation to the applicant and update the PageUp application status to "Background check in progress" and the order status to "New."

    iv.   The applicant will need to complete all required fields in HireRight.

Monitor Background Check

To monitor the status of the background check in PageUp:

1. Navigate to the Job Card > Reports tab and click on the "Background check" report.
2. For more information regarding what each status means, please see PageUp Background Check Status Crosswalk under the Additional Resources heading.

HireRight Updates PageUp with Final Result

1. Application status updated to "Background check complete."
2. Order status updated to "complete."
3. Result status updated to:
   a. Pass (if Meets Company Standards)
   b. Fail (if Does Not Meet Company Standards)
   c. Review – HR Compliance and Hiring team are reviewing the criminal background check results. Please do not modify the applicant status. Please reach out to the HR Analyst for further details.

APPENDIX

Shortlisted Applicants (Optional)

The **Shortlisted Applications** feature allows a user, who has been added to the Job Card as an Additional Viewer, to view a grid of applicants and to learn more about each applicant.

1. From the *Main Menu*, click **Shortlisted Applications**.
   OR
   From the *dashboard*, click the **jobs have shortlisted applicants** link.
2. The *Applicant List* screen opens and displays jobs with shortlisted applicants.
3. Click the **View shortlisted applicants** link. The *Applicant List* table displays all shortlisted applicants for this job posting.
   Note: The only bulk action available in this view is Bulk PDF. To view all applicant documents in one PDF file, use the Bulk PDF function. See the Additional Viewer Guide for more information.
4. Additional information for each applicant displays:
   a) Application Flags
      i. See the Flags tip sheet for more information about flags.
   b) Current application status
   c) Outcome
   d) If the application has been Reviewed
   e) Link to **View** application materials or Applicant Card.
      i. Users with the permission group of Search Committee will see the applicant's profile, application and resume.
      ii. Users with the permission group of Staffing Coordinator or Dean/VP will see the Applicant Card. See the Applicant Card section for additional information.
   f) Click the **Status history** link to view the status of the applicant throughout the hiring process.

Assigned Applications (Optional)

The **Assigned Applications** feature allows a user to assign applications to any other user in the system for review. This may be used when seeking feedback about an applicant from another user. Assigned users will be sent an email notification. The user assigned can view the feedback (approved or declined) under the history section of the Applicant Card.

Note: Only one user can be assigned the application at a time. Assigning an application to another user will cancel the previous assignment.

If applicants have been 'assigned to you for review', use **Assigned Applications** to learn more:
   From the *Main Menu*, click **Assigned Applications**.
   OR
   From the *dashboard*, click the **applicants assigned to you for review** link.
   a) The *My Applicants* screen opens and displays all jobs and applicants assigned to you for review.
   b) Enter the Job number, Classification title and/or select from the *Status* drop-down menu to filter the list. Click **Search** to update the data in the table below.

    c) Click the **View application** link to view each individual application. The Applicant Card opens in a new window. See the [Applicant Card](#) section for additional information.

    d) The assigned user will be able to review the application with the option to approve or decline the applicant. Approving or declining the applicant is for informational purposes only; it has no effect on the applicant status or progress in the process.

Offers that Require Department Approval

If you selected an approval process for an offer that requires the department's approval, you can advise an approver to follow these steps to review the offer:

1. A notification will appear on the approver's *dashboard.* Click the **Offers** link. The *Manage Offer Approvals* screen displays.
2. Select the **View** link to open the Hiring Recommendation in a new window.
3. Click **Approve** or **Decline** as necessary.
   a) If **Decline** was chosen, a prompt will display. Enter a reason for declining.
4. The Originator will get an email confirming the action taken.
   Note: The decline reason will be included in the email, as well as in the History notes in the Applicant Card.

Reporting

Reports are contained in once central location in the ATS, making it easy to access information about multiple postings at once. Your permission group and Job Card role will determine the reports you can view for a particular posting.

The Primary Staffing Coordinator listed on the Job Card can run the following reports for that posting when it is active:

- Applicant List
- Faculty & Academic Staff EEO Summary
- Search Committee Ratings

There is additional reporting available through the Business Intelligence (BI) system:

1. Login to the EBS Portal.
2. Click on the **Business Intelligence and Analytics** tile under the *Enterprise Business Systems* tab. A new window will display.
3. Click on the **HR-Payroll** folder.
4. Click on the **University HR-Payroll Reports** folder.
5. Click on the **HR Unit Reporting Admin and Manager Self Service Reports** folder.
6. **HR Unit Reporting Administrator Reports** folder.
7. Click on the **Hires and Transfers into a College or Department – HRP1015** report.