



# **Applicant Tracking System's Training Staffing Coordinator Guide for Temporary and On-Call Positions**

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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 all in one location during and after the hiring process. It provides oversight into the numerous organizational units in each area and 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

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 TOC Position Request via the Post Temporary or On-Call Position in EBS
  - Upon submission, the TOC position request form will route for unit/department approval. After final department approval, the posting will be created in the Applicant Tracking System (ATS).
2. Post the Position in the ATS
  - Staffing Coordinator approves posting in the ATS.
  - Staffing Coordinator sources the posting to External Careers@MSU to enable application submissions in the ATS.
3. Review applications
  - Applicants may be reviewed immediately as the posting unit/department prefers.
  - Applicants that you will not be moving forward in the process should be dispositioned into an *Interview not selected* or *Does not meet basic qualifications* application status in the ATS.
4. Conduct interviews
  - For each applicant interviewed, change the applicant status to *Interview 1 Completed* (or *Interview 2 Completed*) in the ATS. Enter the interview date on the **Confirm status change** page for Interview 1 or Interview 2.
  - Change the job status to interview
5. Select a Candidate
  - Change the applicant status to *Hire Recommendation* and complete all required fields on the Hire Recommendation.

- For the Data Collection Form, select 'Temp/On-Call (Non-Academic) – New Hire' or 'Temp/On-Call (Non-Academic) – Rehire/Add Assign/Change Position'
- In the event the candidate does not accept the verbal offer,
  - Change the applicant status to the appropriate *"Offer made - declined"* status
  - Change the "Offer declined" radio button on the Hire Recommendation to "Yes"

#### 6. Submit Online Offer to Candidate

- Change the applicant status to *"Offer Made Online"* to submit offer to candidate. **Do not** change the application status into *"Offer accepted"* on behalf of the candidate.
- Upon offer acceptance,
  - Applicant status will be changed to *"Offer accepted"*
  - Applicant will be directed to fill out Data Collection Form. Once the form is submitted, the application status will change to *"Hire documentation completed"*
- Upon offer decline,
  - Applicant status will be changed to *"Offer made – declined via system"*
  - To remove the candidate from the process, change the status to the appropriate *"Offer made – declined"* status based on the reason provided
  - To submit a revised offer to the candidate, change the applicant status to *"Hire Recommendation – Changes Made,"* update the details on the Hire Recommendation and resubmit the online offer to the candidate by changing status to *"Offer Made Online"*

#### 7. Submit Hire Form

- Once the data collection form is submitted by the candidate, a draft Hire Form will be created in EBS and the applicant status will be updated to *"Draft Hire Form Created in EBS"* in the ATS. HR Unit TOC Form Initiators for the hiring org can access the form in their HR/Payroll inbox in the EBS Portal.

#### 8. Disposition all Candidates with the Appropriate Application Status.

- Determine the appropriate status to update the remaining applicant(s).

## TOC INITIATING A 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 – TOC is required to use the Post Temporary or On-Call Position link in the EBS Portal.
- Staffing Coordinator – Manages the postings once in the ATS, which is linked from the EBS Portal.

## POSITION REQUEST GENERAL NAVIGATION

### Saving the Form


Save a draft at any time by clicking **Save Draft**. Save Draft will close the form. To access again via the EBS Portal use My Approvals & Workflow Menu, HR/Payroll Inbox.

### Navigating the Form

The form is a single page. Use the buttons at the top of the screen to jump to a specific section of the form. A downloadable PDF is available in the upper right of the screen at all stages once the form is entered.

Unlike other forms there is no **Check** button on this form. All validation occurs after selecting the **Send** button. Errors will appear at **Send** in the lower left corner of the screen but may also appear in the pop-up box entry points. **Send** will both check for errors and submit the form into workflow.

Here are some additional tips for completing the form:

- Required fields are indicated with an asterisk.
- 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 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
- Numbered lists
- Bulleted lists
- Heading styles level 4-6

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

## GETTING STARTED

### Temporary and On-Call Position Request

Upon opening the **Post Temporary or On-Call Position** tile, the first page collects initial information needed to present the proper questions on the form.

1. Select '**Hiring Process**'
  - a. A selection of *Post a Position* will result in a posting
  - b. If *Add Positions to Posting* is selected, you can add another position to an existing posting. Positions may be added to a posting after the posting has been updated in the ATS. The initial request may have up to 25 positions and then subsequent additions of positions may be

added (in increments up to 25 per addition) for a total of up to 100 positions per posting. Postings may be left open up to one (1) year or until the maximum of 100 positions have been filled (or whichever may come first) For information, go to: Add Positions to Posting page on HR Website

2. Enter **'Desired Posting Date'**: Either directly type or use calendar look-up
  - a. Date cannot be in the past
  - b. Date cannot be greater than one year in the future
3. Answer prompt **'Would you like to use a previous posting as a template?'** Yes/No
  - a. If Yes is selected, enter **'Position Number:'** Either directly type or use look-up
    - Look-up search fields will require a wildcard \* for partial search values
  - b. Answer prompts about position:
    - Form may prompt **'Position is currently on hold for posting. Is recruiting closed?'** Yes/No dropdown
      - If yes, form will allow user to change the position entered
      - If no, form will copy the position entered
  - c. Form may prompt **'Do you wish to post with the existing organizational unit?'** Yes/No dropdown
    - If yes, proceed to the form by clicking the **'Change Position'** or **'Copy Position'** button (Note: None of the values entered up to this point can change after this button is clicked)
    - If no, enter **'Organizational Unit'** as noted below
4. Enter **'Organizational Unit'**: Either directly type or use look-up
  - a. Look-up search fields will require a wildcard \* for partial search values
  - b. Organizational unit cannot report to Residential and Hospitality Services (RHS) because they have their own posting process
  - c. Organizational unit must have established workflow for TOC
  - d. Organizational unit must be allowed to hold positions (object abbreviation has a -P)
5. Answer prompt **'Would you like to post a TOC position from your organization that is currently vacant?'** Yes/No dropdown
  - a. Question will only appear if vacant positions exist and a previous posting is not being used as a template
  - b. If Yes is selected, enter **'Position Number:'** Either directly type or use look-up
6. Click on **'Create Position'** button and form will launch (Note: None of the values entered up to this point can change after this button is clicked)
  - a. If previous posting is used as a template, button to launch form will read **'Copy Position'** or **'Change Position'**
  - b. If vacant position is used button will read **'Change Position'**

## COMPLETING THE FORM

### Organizational Assignment

1. **'Hiring Process'**: populated from initial screen and view only
2. **'Desired Posting Date'**: populated from initial screen and view only
3. **'Position'**: this is the main position number for the form workflow and is view only



4. **'Supervisor'**: Either directly type or use look-up
  - a. Value will prepopulate if using a template position, but may be changed
  - b. Search criteria must be entered for search to work (cannot run wide open)
  - c. Supervisor position cannot be vacant
  - d. Supervisor position cannot be another TOC or student position
5. **'Job'**: Either directly type or use look-up
  - a. Value will pre-populate if using a template position, but may be changed
  - b. Search criteria is not required for search to work (can run wide open)
  - c. Only valid jobs for posting will appear in the search or be accepted for direct entry
6. **'Will this be a temporary or on-call position?'**: Temporary/On-Call dropdown
  - a. Answer may default based on job selection
7. **'This on-call position will be:'**: Hourly/Project Pay dropdown
  - a. Prompt may not appear if position is 'Temporary'
  - b. Answer may default based on job selection
8. **'Is this a pool posting (multiple position posting):'**: Yes/No dropdown
  - a. No: only one position is created and posted, however more positions can be added later if needed following the 'Add Positions to Posting' process
  - b. Yes: **'Number of positions needed:'**: dropdown values 2 through 25
9. **'Reason for request:'**: Dropdown selection:
  - a. Values vary based on scenario but can include:
    - ii. New Position
    - iii. Resignation
    - iv. Termination
    - v. Leave Coverage
    - vi. Restructure
    - vii. Parental Leave
    - viii. Retirement
    - ix. Build an Applicant Pool
10. **'Organizational Unit'**: populated from initial screen and view only

### Administrative Address

1. Administrative Address (MSU mailing address for the position)
  - a. Values will pre-populate if using a template position, but may be changed
  - b. **'Location ID'**: Either directly type or use look-up
  - c. Search criteria is not required for search to work (can run wide open)
  - d. Optional **'Suite/Room #'**: free form entry, no validation
  - e. Optional **'Phone#'**: format must be AAANNNXXX and no more than 10 digits
  - f. Optional **'Extension'**: must be numeric and no more than five digits
  - g. **'Address Line1'**: display only and populates based on Location ID entered
  - h. **'Address Line2'**: display only and populates based on Location ID entered
  - i. **'City'**: display only and populates based on Location ID entered
  - j. **'State'**: display only and populates based on Location ID entered

- k. **'Zip Code'**: display only and populates based on Location ID entered
  - l. **'Country'**: display only and populates based on Location ID entered
2. Location for Careers@MSU Search
- a. **'Location'**: dropdown values:
    - i. East Lansing
    - ii. In State
    - iii. Out of State

## Compensation

1. Compensation (will not be visible to applicants)
  - a. **'Employment Percent'**
    - i. Field appears only when assignment is temporary
    - ii. Must be between 50-100%
    - iii. Field is hidden for on-call, but will populate a value of 47.5% (19 hours)
  - b. Optional **'Hourly Rate'**
    - i. Field will appear for temporary and hourly on-call positions only
  - c. Optional **'Lump Sum'**
    - i. Field will appear for project pay positions only
  - d. Optional **'Range of Pay'**
    - i. A Field will only appear for variable rate jobs
2. Cost Distribution (**optional**)
 

**Note:** Labels in this section include both HR/Payroll (SAP) and Finance (KFS) terms; the KFS terminology is in parentheses

  - a. Funds are entered as a row in a table by clicking on the + in the upper right of the table
    - i. A pop-up will appear:
      1. **'Fund (Chart/Account)'**: Either directly type or use look-up
        - a. Search criteria must be entered for search to work (cannot run wide open)
        - b. Funds are not validated until **'Send'**
      2. **'WBS Element (Sub-account)'**: Either directly type or use look-up
        - a. Value is required if fund is provided and will pre-populate/default as 'NO\_SUB-ACCOUNT', but can change
        - b. Search criteria must be entered for search to work (cannot run wide open)
      3. **'Cost Center (Sub-object)'**: Either directly type or use look-up
        - a. Value is optional and search will not be available until fund is entered
        - b. Search criteria must be entered for search to work (cannot run wide open)
      4. **'Order (Project Code)'**: Either directly type or use look-up
        - a. Value is optional
        - b. Search criteria must be entered for search to work (cannot run wide open)
      5. **'Percentage'**: value required if fund is given
        - a. Total percent across all funds provided must total 100
      6. **'Functional Area (Org. Ref ID)'**: Either directly type or use look-up
        - a. Value is required if fund is provided and will pre-populate/default as '99999999'

- ii. Multiple fund sources may be entered however the percentage entered for each fund must equal 100
- iii. Once a fund is entered, it can be edited with the pencil icon in that row or removed with the x icon in that row

## Position Description

1. Position Description
  - a. **'Posting Title'**: display only and populates based on job selected
  - b. **'Posting Snapshot (Advertising Text)'**: directly type or paste unformatted text.
    - i. The Posting Snapshot is a short description of the position to get an applicant's attention on the Careers @ MSU website. This field is limited to 400 characters
    - ii. Value will pre-populate if using a template position, but may be changed
  - c. **'University Position Summary (Basic Job Function)'**: display only and populates based on job entered
  - d. Optional **'Unit Position Summary'**: Either directly type or paste formatted text for posting
    - i. Value may pre-populate if using a template position, but may be changed
  - e. Optional **'Desired Qualifications'**: Either directly type or paste formatted text for posting
    - i. Value will pre-populate if using a template position, but may be changed
2. Work Hours
  - a. **'Work Hours'**: dropdown values:
    - i. On-Call (Note: Will prepopulate as display only if the position is on-call and is not available for selection at any other time)
    - ii. Non-Standard
    - iii. Standard 8-5
    - iv. Variable
  - b. If 'Non-Standard' then enter **'Specify non-standard hours:'**: directly type or paste unformatted text for posting
  - c. If 'Variable' then enter **'Specify variable hours:'**: directly type or paste unformatted text for posting
3. Physical Demands & Health Risks
  - a. **'Physical Demands'**: Yes/No dropdown
    - i. If 'Yes' enter **'Physical Demands Summary'**: directly type or paste formatted text for posting
  - b. **'Health Risks'**: Yes/No dropdown
    - i. If 'Yes' enter **'Health Risks Summary'**: directly type or paste formatted text for posting
4. Applicant Instructions
  - a. Optional **'Department Website'**: directly type or paste web address for posting
    - i. Value will pre-populate if using a template position, but may be changed
  - b. Optional **'Required Application Materials'**: directly type or paste formatted text for posting
    - i. Value will pre-populate if using a template position, but may be changed
  - c. Optional **'Spl. Instructions to Applicants'**: directly type or paste formatted text for posting. The abbreviation Spl. Stands for 'Special'.
    - i. Value will pre-populate if using a template position, but may be changed
    - ii. NOTE: if the Reason for Request is 'Build an Applicant pool' then the text

“Applications will be reviewed as needed” will appear in this section of the posting in the ATS

Note: The posing text in the form will be formatted and sent to the ATS and is set to a standard font, size, and order which each field name provided as a heading for the provided text. IF any of indicated **OPTIONAL** text in aforementioned fields is not populated then that section of text it will NOT appear in the text.

## Committee Information (OPTIONAL)

1. Search/Selection Committee
    - a. **'Is a Search/Selection Committee needed? (Optional)'**: Yes/No dropdown
      - i. Defaults to 'No'
      - ii. If 'Yes' committee members are entered as a row in a table by clicking on the + in the upper right of the table
        1. A pop-up will appear
          - a. **'MSU Net ID'**: Either directly type or use look-up
            - i. Search criteria must be entered for search to work (cannot run wide open)
            - ii. Net IDs are not validated until 'send', but name and email will not update correctly if they are not valid values
          - b. **'Chair'**: checkbox, select if member will be committee chair, only one is allowed, but one is required
          - c. **'First Name'**: display only and populates based on Net ID entered
          - d. **'Last Name'**: display only and populates based on Net ID entered
          - e. **'Email'**: display only and populates based on Net ID entered
        2. Repeat as needed until all committee members are entered
        3. Once a committee member is entered the entry can be edited with the pencil icon in that row or removed with the x icon in that row
2. Staffing Coordinator
  - a. Staffing Coordinators are entered as a row in a table by clicking on the + in the upper right of the table
    - i. A pop-up will appear
      1. **'MSU Net ID'**: Either directly type or use look-up
        - a. Search criteria must be entered for search to work (cannot run wide open)
        - b. Net IDs are not validated until 'send', but name and email will not update correctly if they are not valid values
      2. **'Name'**: display only and populates based on Net ID entered
      3. **'Role'**: dropdown values:
        - a. Primary
        - b. Backup 1
        - c. Back up 2
      4. **'Email'**: display only and populates based on Net ID entered
    - ii. Repeat as necessary. Up to three (3) Staffing Coordinators may be entered
    - iii. Once a staffing coordinator is entered, the entry can be edited with the pencil icon in that row or removed with the x icon in that row

- iv. Only primary staffing coordinator is required, backups are encouraged, but optional

### Ad Hoc Approvers

1. Ad Hoc Approvers
  - a. Ad hoc approvers are entered as a row in a table by clicking on the + in the upper right of the table
    - i. A pop-up will appear
      1. **'MSU Net ID'**: Either directly type or use look-up
        - a. Search criteria is not required for search to work (can run wide open)
        - b. Net IDs are not validated until 'send', but name will not update correctly if they are not valid values
      2. **'Name'**: display only and populates based on Net ID entered

### Notes

Directly type or paste in text that would be helpful for approval or internal record keeping, click on the arrow to save the text to the form. Can be edited or deleted before sending as needed.

### Attachments (Optional for TOC Process)

This form has no required attachments, but general attachment can be added in two methods

1. Using the + icon a pop-up directory will appear to let users search for and select a file to attach
2. The file may also be dragged and dropped from a desktop or other open file directory

### Submit into Workflow

1. Click the 'Send' button in the lower right to send into workflow
  - a. Any errors will appear in the lower left corner before the form is routed
  - b. If there are no errors a pop-up will appear with the process reference number/posting number
  - c. Form will route for approval first to any Ad Hoc Approvers first, then the hiring Department Approvers, and finally Funding Approvers before updating Page Up.
2. Once the form is fully approved the Staffing Coordinators will be emailed to alert them, they have a new posting.

### Once updated in the ATS

Once updated in the ATS:

- The posting will need to be approved and sourced before it will be "live" in the ATS
- The posting will open for application submissions based on information entered on the position request form
- Temp On-Call Positions will be posted at any time based on Unit preference.

### Troubleshooting Common Issues in the Posting Forms

- **Entered Values are Disappearing**
  - a. It is most likely that the values were entered just before the form validated the previous entry. Entries could be entered faster than the form can validate. If the value was entered and then the processing 'bubble' appeared just before the value disappeared, then this is the cause.
- **Option to 'Drag & Drop' an Attachment Disappeared After an Attachment was Added**

- a. The option is still there, it just is not as clear. Drag the next attachment over the existing attachment and the form will accept it as a second attachment.
- **Adding Positions results in the error “No Position Found for this Posting Number”**
  - a. Check that the original posting form is full processed before trying to add positions.
- **Where is My Posting Number?**
  - a. The posting number is the process reference number for the position/posting form. It will show up on the form in workflow.

## 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.

### Applicant Tracking System Navigation

The *Applicant Tracking System dashboard* displays 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:

1. The Primary Staffing Coordinator can access these tasks from:
  - a. the **jobs open** link on the *dashboard*, OR;
  - b. the **Manage jobs** link from the *Main Menu*. **Manage jobs** provides the Primary Staffing Coordinator with more functionality.
2. Staffing Coordinator Backup 1 can only access postings from the **Manage jobs** link from the *Main Menu*.
3. 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., Senior Human Resources Professional)
    - i. Click the information button next to the job title to see a quick view of the job posting information. There are additional links here for Notes, Job Preview, Status, HR Analyst details (User), Staffing Coordinator details (Owner), and Applications.
    - ii. Click the **Job Title** to go directly to the Job Card. See the [Job Card](#) section 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 the [Manage Applications](#) section 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
4. To the far right of the screen, each job has the following options:
- a. 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.
  - b. View/Add Notes - Click the **Notes** button to open the *Notes* screen. See [Job Card – Notes tab](#) in this document for additional information.
  - c. Preview the Job – Click the **Preview** button to open the advertised posting text.
  - d. 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. Click **Show other search criteria** to find additional filtering options. Click **Search** for results to update.
 

**Note:** The **Current recruitment** status is for all 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.
  - b. Click the **Hide other search criteria** link to hide the additional filtering options.
  - c. 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 by *Status* by clicking on the All, Current or Non-current buttons. Click on the title of the column to sort jobs by:
  - a. Job Number
  - b. Classification title
  - c. Date added
  - d. Status
2. Click the **View** link to open the Job Card. See the [Job Card](#) section 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
- Sourcing
- Documents
- Reports

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:
  - a. Search Chair and Committee Members
  - b. Additional Viewers
  - c. Staffing Coordinators
  - d. 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 modifying additional users allow them 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.
  - a. To add a note, select **Note** from the *Add* drop-down menu. The *Add Note* screen opens in a new window.
  - b. Enter the necessary information into the Note field.
2. Add attachments and/or email the note to someone else if necessary.
3. Click **Save**. The note (and file, if added) will display on the *Notes* screen for all users to view.
4. To edit or delete an existing note, please contact the individual who created the note.

### Job Card – Sourcing Tab

The *Sourcing* tab is used to source a posting to sourcing channels (i.e. job boards). Staffing Coordinators have the ability to source TOC postings to the Careers@MSU site. Click on the 'Add sourcing channels' button to source the posting to the Careers@MSU site. For more information about how to source a posting, see [Source the Posting](#).

Once the posting has been sourced, it will display on the Sourcing tab along with the opening date and closing date. The following actions can be taken:

- Click on the Twitter and LinkedIn icons located next to the sourcing channel to post to Twitter/LinkedIn



- Click on the name of the sourcing channel to edit the opening date and/or closing date on the sourcing channel
- Click on the 'Actions' menu to the right of the sourcing channel and select 'Close' to close the sourcing channel to application submissions.

## Job Card – Documents Tab

The *Documents* tab contains documents relating to this job posting, such as the Salary Justification Letter, Screening Matrix, and Interview Questions. The drop-down menu provides the following options:

- Upload document from a computer.
- Download document templates from the ATS Library (offer letter templates or Salary Justification Letter templates.)
- 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.

**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.
  - a. 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.
  - b. Choose the appropriate template and click Okay to generate the report. Click Save.
  - c. Update the template as necessary and save as a new Word document.
  - d. 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.
  - a. Click Upload file and select a file.
  - b. Make a selection from the Document Category drop-down menu.
  - c. Enter a Title.
  - d. 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.

## Job Card – Reports Tab

The *Reports* tab contains reports that are specific to that posting. Staffing Coordinators can run the following reports for a posting:

- Applicant List\*
- Department EEO Summary\*
- Event Bookings
- Reference Checks

- Search Committee Ratings (Primary Staffing Coordinator)\*\*
- Sourcing & Referrals

Reports can be viewed three ways:

1. Click on the title of the report to view in the browser
2. Click on the paper icon with the X to download to Excel

**Note:** Recommended for 'Applicant List' and 'Department EEO Summary'

3. Click on the paper icon to download to CSV

\*Report has built-in calculations and formatting that can only be viewed by downloading to Excel.

\*\*This report can only be pulled by the Primary Staffing Coordinator on the posting.

## APPROVE THE POSTING IN THE ATS

- **Who can complete the approval process?**

The staffing coordinators on the posting can complete the approval process. Additionally, users with Dean/VP/Director and Delegate permissions can complete the approval process for any posting within their MAU.

- **Who *should* be entered as the approver?**

Technically, any system user can be entered as the approver. However, it is highly recommended that the individual completing the approval process enter their own name as the approver to auto-approve the job. If the posting is sent to another user for approval, the approver cannot be changed by the staffing coordinator once the approval is in progress, which will impede their ability to source the posting. Only HR Analysts can change the approver once it is in progress.

- **What happens once the job is approved?**

1. The job status is updated to 'Approved'
2. A 'Posting approved' email is sent to HR Analyst, Primary Staffing Coordinator and Staffing Coordinator Backup 1 notifying them that the posting is available in the ATS. (Note: Staffing Coordinator Backup 2 does **not** receive this notification.)
3. The Sourcing tab becomes visible to staffing coordinators, Dean/VP/Directors and Dean/VP/Director Delegates

To complete the approval process:

1. Navigate to 'New Jobs' tile and click on **# Jobs Open**
  - Note: Staffing coordinator navigation varies based on staffing coordinator role on Job Card. For more information, see the Staffing Coordinator Permissions resource on the [Applicant Tracking System Tip Sheets](#).
2. Click on posting to navigate to Job Card
3. Complete '**Approval Process**' at the bottom of the job card
  - a. Select '**Temp/On-Call (Non-Academic)**'
  - b. Enter **your name** as '**Approver 1**' to auto-approve job
4. Click Save.

## SOURCE THE POSTING

**General Information:**

- **Who can source the posting?**  
Staffing Coordinators, Dean/VP/Directors and Dean/VP/Director Delegates can source approved postings to TOC External Careers@MSU. If the job has not been approved, the Sourcing tab will not be visible to these users.
  - **Where is the posting sourced?**  
Once the posting is on Careers@MSU, it will be automatically picked up by an RSS feed and posted to [Pure Michigan Talent Connect](#). Please note that postings with a location of Out of State/Country, will not be posted to Pure MI.  
If desired, staffing coordinators can post the job to LinkedIn or Twitter through the Sourcing tab by clicking on the LinkedIn and Twitter buttons next to the sourcing channel.
  - **How long does posting take to appear after sourcing?**  
The posting may take up to 30 minutes to post to Careers@MSU.
1. Click on the **'Sourcing'** tab on the Job Card
  2. Click on the **'Add sourcing channels'** button
  3. Check the box next to **'TOC External Careers@MSU'**
    - ▲ Important Note: If the checkbox is not selected, the sourcing channel will be saved as a draft and any errors will be bypassed. The checkbox **must** be selected to enable error handling and post the job to the sourcing channel.
  4. **'Opening Date'** (required)
    - a. Enter date and time. The Opening time will default to 1:00 PM but is editable.
  5. **'Closing Date'** (optional)
    - a. Enter date and time. The Closing time will default to 11:55 PM but is editable.
    - ▲ Important Note: Posting must be open for a minimum of 24 hours.
  6. Select Full Time/Part Time Category (required)
    - a. Check **'Temporary'** and/or **'On-Call'**
  7. Select Application form (required)
    - a. Choose **'Temporary/On-Call (Non-Academic) Form'**
  8. Click **Save**.

## 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 right 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 *Main 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 in a new window.
    - 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. To cancel a future scheduled email, navigate to the Applicant Card and select the 'Scheduled emails' tab. Locate the email and click 'Delete'.
- **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. Send emails to applicants and internal users as appropriate.
  - **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.
  - **Bulk Send**  
Used to send application materials to another user as separate attachments. For example, if two applicants are selected and the resume 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.
  - a. Select **Bulk Compile and Send** from the drop-down menu.
  - b. **Note: Bulk Compile and Send** does not send the document automatically but does provide the option to send via email once generated.
  - c. Select all documents to include and click **Create PDF**.
  - d. Choose to download the PDF or send to others for review.
 

**Note:** MSU has limitations on attachment sizes. Please be aware, users may have limitations on the size of attachments that may be shared.
  - e. Download the PDF: click the **Download Document** link to open the PDF or right-click on the link to save in a folder.
  - f. Send PDF to others for review: Enter information in the email form and edit as needed.
  - g. Click **Okay** to send the email and return to the *View Applicant* screen.

### Applicant Card

The Applicant Card displays the following information:

1. Applications
  - a. Under the *Applications* heading, click **Form** and/or **Resume** to view applicants' answers and resume information. Click the **Print** button in the top right corner to print the application.
2. 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, reference letters, offer contracts)
- e. **Scheduled emails:** This tab will only appear if there are future emails that are scheduled to be sent to the applicant. Scheduled emails can be cancelled by the user who scheduled them by clicking on the 'Delete' link found under the email.
- f. Click the **Print** button in the top right corner to print the application.

## CHANGING APPLICANT STATUSES

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. To view which email notifications can be modified and which are sent automatically, see the [Application Statuses and Email Notifications](#) tip sheet.

### 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.
  - a. Select the appropriate **Application status** from the *Change application status* screen and click **Next**.
  - b. The *Confirm Status Change* screen displays. See [Confirm Status Change](#) 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.
  - a. Once the appropriate box has been checked for each applicant, select **Bulk Move** from the drop-down menu.
  - b. Select the appropriate status from the drop-down menu and click **Next**.
  - c. 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. 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.

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. To cancel a future scheduled email, navigate to the Applicant Card and select the 'Scheduled emails' tab. Locate the scheduled email to cancel and click 'Delete'.
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.
  - 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. Disqualifying 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. By default, the job status will update automatically unless the user elects to opt out of the status change. To opt out of an automatic job status change, select the 'No' radio button
    - ii. Click the **Move now** button.

## EVENTS (OPTIONAL FUNCTIONALITY)

The event function in the ATS is used to schedule 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 –interview.
- 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.

4. Add event to owner's dashboard – select the **Yes** radio button for notifications to display on the dashboard.

- a. Enter Contact name
- b. b. 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.

5. 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)
    1. Invitees can be listed in all timeslots or assigned one.
    2. Invitees will receive a notification on their dashboard and can monitor who has been booked into each timeslot by clicking the **scheduled interviews** link.
  - c. 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.
  - d. Click **Add** to add the timeslot to the table below.
4. To *Add bulk timeslots*:
  - a. Click **Add**. The *Bulk add timeslots* screen opens.
  - b. Enter from and to dates.
  - c. Check the boxes for applicable days of the week.
  - d. Enter Start time and End time.
  - e. 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.



- f. Click **Invite** to invite internal users to the event.
  - 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.
- g. Click **Add** to add the timeslot to the table.
  - i. **Note:** Click **Edit** or **Remove** to make changes or delete the timeslot if applicable.
5. 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.
6. Select the **Yes** radio button to send an email to internal users invited to the event.
7. 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.

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**. The *Results* tab displays the selected criteria.
3. 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.
4. From the drop-down menu at the top of the screen, select **Bulk move**. The *Bulk move* screen opens in a new window.
5. From the *Application status* drop-down menu, select **Interview Scheduling**. Guidance information is displayed. Please review and follow guidance as applicable.
6. Choose the radio button **Select an event** for the applicant.
  - a. Click on the binoculars to search for the event.
7. 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.
8. 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. You also have the option to add attachments to the email (directions, parking instructions, etc.)
    - i. To add an attachment, drag and drop the document to the document uploads section below the email or click on the document uploads section to browse from a local drive.
9. Click **Move now** to change the status and complete the invite.
10. 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*, the event owner will receive an email notification. No notification is sent if an applicant changes their timeslot. For the most up-to-date listing of booked timeslots, see the 'Event Bookings' report on the Job Card – Reports Tab.

## Manage Events

From the *Main Menu*, click **Manage events**.

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.
3. Click **View bookings**. The *Manage bookings* screen displays event details, booking information and status of that booking.
  - a. Click the **Back to manage events** link to return to the *Manage events* screen.
  - OR
  - b. Click the **Print bookings** link to open a print dialogue.
4. 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.
5. 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.

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.

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 (OPTIONAL FEATURE)

### Manually Entering Reference Contact Information

If references are not provided on the application, you can manually enter the referee information on the applicant's record.

1. On the Applicant Card, click on the *ellipses button* listed next to the application.
2. Click **View references** from the drop-down menu.
3. At the top of the screen, click **New** to manually create a new referee.
4. Enter in the referee information. Click **Save**.

### Invite Referees To Conduct Reference Letter/Reference Check

Reference letters and letters of recommendation may be requested 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**.

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 **Support Staff – Reference Check** form. Referees are asked a series of questions about their employment experience with the applicant.
5. Modify the email to be sent to referee. To add an attachment or custom questionnaire, drag and drop the attachment to the document uploads section under the email or click on the document uploads section to browse local files.
6. Click **Finish** to send invitation to referees.

### 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 *elipses dots* 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 the **Save and add another** button to upload another reference letter or **Save and Close** to close the window.

### 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. Locate the application and select the *ellipses* button. Select **View References** from the 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

The status of reference check requests can be monitored via the 'Reference Checks' report on the Job Card – Reports tab.

## OFFERS

### Recommend Applicant for Hire

When an applicant is ready for hire, you must change the applicant status to *Hire Recommendation*.

Do NOT use Bulk move for this action.

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. Click **Move now**.
5. The *Hiring Recommendation* screen will open in a new window. Continue to the Offer Card/Hiring Recommendation section for the next steps.

### Offer Card/Hiring Recommendation

After you have changed the application status to *Hire Recommendation*, the *Hiring Recommendation* (also referred to as the Offer Card) screen will open in a new window. This 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 (Optional)
- Approval process (Optional)

Required Fields on the Hire Recommendation/Offer Card:

1. Complete the following required fields on the Hire Recommendation/Offer Card:
  - a. Enter '**Hours per week**'
  - b. Select '**Start Date**' from calendar lookup (if manually entering date into field, must use format Nov 4, 2020, Feb 21, 2021...)
  - c. Select '**Offer Type**': Choose 'Temp/On-Call (Non-Academic)'

- d. Select **'Hire Action'**: Choose 'New Hire'
  - i. Other options are: Transfer, Promotion & Demotion
- e. Select the appropriate **'Reason candidate was selected'**
- f. Enter **'Supervisor'**
  - i. Value will pre-populate with Staffing Coordinator Backup 2, but can be changed to real supervisor
- g. Select **'Data Collection Form'**: Select appropriate form
  - i. Temp/On-Call (Non-Academic) – New Hire
  - ii. Temp/On-Call (Non-Academic) – Rehire/Add Assign/Change Position
    - (i) Can determine whether individual applicant is a new hire by utilizing the Currently Employed Report through the Business Intelligence and Analytics tile in EBS.
- h. Select **'Onboarding task list'**: Choose 'Temp/On-Call (Non-Academic)'
  - i. Onboarding is not enabled for the TOC recruitment process and will not be triggered for the applicant, but a value must be selected for this required field.
- i. Click **Save**.

Upload or Merge Offer Letter:

1. **(Optional)** Upload or merge offer letter to Hire Recommendation
  - a. Click **'Merge document'**
  - b. Check the box next to 'Temp/On-Call (Non-Academic) Offer Letter) and click **'Merge'**.
    - i. If the system cannot merge information into a field on the template, it will be presented as an error. Click 'Retry' to try to merge the field again. If that fails, click 'Ignore'. You may need to manually correct the error by downloading the merged document.
  - c. The merged document will be displayed under the 'Offer documents' section. Click on **'View'** to download the letter. Edit the document as needed and save to your desktop.
  - d. Navigate back to the Hire Recommendation and click **'Add document'**
    - i. Click **'Upload File'** to upload the updated offer letter
    - ii. Select **'Offer Contracts'** for the Document Category. (Note: Applicants will only be able to see documents uploaded as 'Offer Contracts')
    - iii. Enter **'Title'**
    - iv. Click **'Save and close'**
  - e. Click **'Delete'** to remove the old version of the offer letter
2. Click **'Save and close'** on the Hiring Recommendation page.

## Making the Offer

**Note:** It is recommended that a verbal offer be made prior to submitting the formal offer letter to the candidate via the system to better facilitate the negotiation process and eliminate unnecessary handoff to the candidate.

When the formal offer is ready to be sent to the candidate via the system:

1. Locate applicant and click on application status to open *Change application status* page
2. Select **'Offer made online'** and click **Next**.
3. Edit the email to applicant (if desired) and click **Move now** to submit the offer to the applicant.

The applicant must log into their Applicant Portal where they will see an offer notification. If an offer letter is attached, the applicant must open the offer letter and accept or decline. If an offer letter is not attached, the applicant can simply accept or decline. If declining, they will be prompted to provide a reason. Their applicant status will be also be updated automatically to one of the following:

- Offer accepted
- Offer made – declined via system

If the applicant declines the offer, the staffing coordinators, Supervisor and HR Analyst listed on the Hiring Recommendation will receive an email. You must update the status to one of the statuses listed below to reflect the appropriate reason. The offer decline reason can be found in the **History** section of the Applicant Card and will also be emailed to the Primary Staffing Coordinator.

- *Offer made – declined due to benefits/compensation*
- *Offer made – declined due to location*
- *Offer made – declined due to other job opportunity*
- *Offer made – declined without reason*

If the candidate accepts the offer:

- The staffing coordinators, Supervisor and HR Analyst listed on the Hiring Recommendation will receive an email
- Once the offer has been accepted, the candidate will be prompted to fill out the Data Collection Form. These are a series of questions that are used to pre-populate the Hire Form in EBS. The candidate is also provided with a congratulatory message.
- Once the Data Collection Form is submitted in PageUp:
  - The application status will be automatically updated to 'Hire documentation completed'
  - The staffing coordinators will receive an automated email notifying them that the data collection form has been submitted.
  - The applicant data collection form will interface between the ATS and EBS within 30 minutes to create a draft Hire Form in EBS. Once the draft Hire Form has been created in EBS, the applicant status will automatically be updated to 'Draft Hire Form Created in EBS' and the staffing coordinator(s) will receive an automated email from PageUp notifying them that the draft has been created.
    - If the draft cannot be created due to an error, the applicant will be automatically placed into one of the following statuses:
      - Error Creating Draft Hire Form (MSU HR action required)
      - Error Creating Draft Hire Form (Unit action required)

## Monitoring or Managing All Offers

There are multiple ways to access offer information or to monitor the 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.
  - a. The My New Hires screen gives an overview of all hire actions a user has access to.

- b. You can filter this grid by columns to group hires (e.g., by status, by posting, candidates in alphabetical order).
- c. From this screen, you can access the Applicant Card and the Hiring Recommendation. In addition, you can view the Hiring Recommendation from the Applicant Card once submitted by selecting the Hire Recommendation link found under the 'Offer' section.

## DISPOSITION CANDIDATES NOT SELECTED

1. Disposition multiple candidates into the same disqualifying status by checking the colored box next to each applicant. The colored box should be the same for all applicants selected.
  - a. See also [Bulk Actions](#) and [Changing Applicant Status](#) sections below
2. From the **'Select a bulk action menu'**, choose **'Bulk move'**
3. Select **'Application Status'** and click **'Next'**
4. If desired, create/edit the email to applicant.
5. Select reason from the dropdown menu located at the bottom of the page. The reason selected should match the status selected.
6. Click **'Move now'**
7. Verify that all applicants have been dispositioned (with the exception of applicants for hire):
  - a. Click on the **'Search'** tab underneath the Job title
  - b. Check the box next to **'Current application statuses only'** and click **'Search'**
  - c. If all applicants have been dispositioned, no applicants should be returned (with the exception of applicants for hire)
  - d. To clear the filter, click on the Search tab, and click **'Clear'** and **'Search'** once again

Once an HR Analyst approves the Hire form and confirms that the dispositions are updated appropriately, the disposition of the hired candidate will be updated to 'Hired'.

## SUBMIT HIRE FORM

A draft form will be automatically created in EBS once the applicant completes the Data Collection Form in the ATS. This form will be pre-populated with information collected from the applicant on the Data Collection Form.

### Security Roles

To access the draft form:

- The employee must have the 'HR Unit TOC Form Initiator' role for the hiring organizational unit
  - For this role, an eARM must be processed submitted and processed.
  - Initiate an eARM: [IT Services eARM](#) | [Michigan State University](#)
- The form can be accessed via EBS Portal; My Approvals & Workflow Tile; HR/Payroll Inbox

## HIRE FORM GENERAL NAVIGATION

### Saving the Form

Save a draft at any time by clicking **Save Draft**. Save Draft will close the form. To access again via the EBS Portal use My Approvals & Workflow Menu, HR/Payroll Inbox.

### Navigating the Form

- Unlike other forms there is no 'Check' function on this form.

- The form will “open in place” in the inbox for approvers and will open in a new, pop up screen for Initiator and CHR.
- Table entry is used on this form for some data. These are entered via pop-up box so pop-ups will need to be enabled.
- Labels on funding have both SAP and KFS terminology; KFS terms are in parentheses.
- Errors will appear at ‘Send’ in the lower left corner of the screen but may also appear in the pop-up box entry points.
- A downloadable PDF is available in the upper right of the screen at all stages once the form has been submitted

## GETTING STARTED

### Hire, Rehire, Additional Assignment Form

HR Unit TOC Form Initiators for the hiring organizational unit will be able to access and complete the draft Hire/Rehire/Add Assignment Form in their HR/Payroll Inbox.

The type of form (HIRE, REHIRE, ADDITIONAL ASSIGNMENT) will be determined by whether the applicant has held a prior position and is thusly in the HR/Payroll System already. Many of the Data fields on the below have commonalities except as indicated.

## COMPLETING THE FORM

### Personal Data

1. **‘Effective Date’**: populated from interface and view only
2. **‘First Name’**: For HIRE form populated from interface and editable. For REHIRE or ADDITIONAL ASSIGNMENT, populated from SAP person record and view only.
3. **‘Middle Name’**: For HIRE form populated from interface and editable. For REHIRE or ADDITIONAL ASSIGNMENT, populated from SAP person record and view only.
4. **‘Last Name’**: For HIRE form populated from interface and editable. For REHIRE or ADDITIONAL ASSIGNMENT, populated from SAP person record and view only.
5. **Suffix’ (if applicable)**: For HIRE form populated from interface and editable. For REHIRE or ADDITIONAL ASSIGNMENT, populated from SAP person record and view only.
6. **‘SSN’**: For HIRE form populated from interface and editable. For REHIRE or ADDITIONAL ASSIGNMENT, populated from SAP person record and view only.
7. **‘ZPID’**: should not exist for new hire, blank and view only. For REHIRE or ADDITIONAL ASSIGNMENT, populated from SAP person record and view only
8. **‘Gender’**: For HIRE form populated from interface and editable. For REHIRE or ADDITIONAL ASSIGNMENT, populated from SAP person record and view only.
9. **‘Date of Birth’**: For HIRE form populated from interface and editable. For REHIRE or ADDITIONAL ASSIGNMENT, populated from SAP person record and view only.
10. **‘Citizenship Status’**: For HIRE form populated from interface and editable. For REHIRE or ADDITIONAL ASSIGNMENT, populated from SAP person record and view only.
11. **‘I-9 Status’**: defaults and is view only for HIRE. For REHIRE or ADDITIONAL ASSIGNMENT, populated from SAP person record and view only



## Hiring Process

1. **'Hiring Process'** will = Post a Position (view only)
2. **'Posting Number'**: populated from interface and view only

## Additional Personal Data

1. Select **'Disability'**: For HIRE form, if provided, populated from interface and editable (choose from dropdown selection if needed) For REHIRE or ADDITIONAL ASSIGNMENT will only appear to select if not saved on the employee record.
2. Select **'Veteran Status'**: For HIRE form if provided, populated from interface and editable. (choose from the radio buttons if needed) For REHIRE or ADDITIONAL ASSIGNMENT will only appear to select if not saved on the employee record.
  - a. Protected Veteran
  - b. Prefers Not to Answer
  - c. Not a Protected Veteran
    - i. If protected veteran is chosen, a value should be chosen from the checkboxes to indicate their veteran status
3. Select **'Ethnicity'** For HIRE form if provided, populated from interface and editable. (choose from the dropdown if needed) For REHIRE or ADDITIONAL ASSIGNMENT will only appear to select if not saved on the employee record.
  - a. Of Hispanic or Latino Origin
  - b. Not of Hispanic or Latino Origin.
  - c. If not of Hispanic or Latino origin is chosen, a value should be chosen from the checkboxes to indicate their ethnicity.

## Organizational Details

1. Organizational Assignment
  - a. **'Organizational Unit'**: populated from SAP position record and view only
  - b. Select **'Supervisor'**: populated from SAP position record and editable by either directly type or use look-up
    - i. Search criteria must be entered for search to work (cannot run wide open)
    - ii. Supervisor position cannot be vacant
    - iii. Supervisor position cannot be another TOC or student position
  - a. **'Job ID'**: For HIRE form populated from position record in system and view only. For REHIRE or ADDITIONAL ASSIGNMENT populated from SAP position record and is editable by either directly typing or using look-up. If the action is NOT HIRE, then:
    - i. Search criteria is not required for search to work (can run wide open)
    - ii. Job cannot be Stagehand (separate process)
    - iii. Job must be biweekly Temporary or On-Call job
    - iv. Job must match assignment type

- b. **'Assignment Type'**: For HIRE form, populated from SAP position record and is editable by choosing dropdown. For REHIRE or ADDITIONAL ASSIGNMENT populated from SAP position record and is view only.
  - c. **'Primary Assignment End Date'**: populated based on form logic for position and is editable by using calendar look up or entering date.
  - d. **'Position ID'**: populated from interface and view only
  - e. **'Payroll Area'**: populated based on form logic for position and view only
  - f. **'Personnel subarea'**: populated from SAP position record and view only
  - g. **'Employee Group'**: populated from SAP position record and view only
  - h. **'Employee subgroup'**: populated from SAP position record and view only
2. Description
- a. **'Position Summary'**: populated from SAP position record and view only
  - b. **'Unit Position Summary'**: populated from SAP position record and view only
3. Planned Working Time
- a. **'Work Schedule Rule'**: populated from based on form logic for position and editable
  - b. **'Employment Percent'**: populated from SAP position record and editable in the free text field for percentage entry (will prepopulate to 47.50 and view only for on-call positions)

## Contact Information

1. Home Address
- a. **'Address Line 1'**: populated from interface OR from SAP record and editable
  - b. **'Address Line 2'**: populated from interface OR SAP record and editable
  - c. **'City'**: populated from interface OR SAP record and is editable
  - d. **'State'**: populated from interface OR SAP record and editable
  - e. **'Zip Code'**: populated from interface OR SAP record and editable
  - f. **'Country'**: populated from interface OR SAP record and view only
  - g. **'Phone'**: populated from interface OR SAP record and editable
  - h. **'Restrict Address'**: check if applicable
  - i. **'Restrict Phone'**: check if applicable
2. Emergency Contact
- a. **'First Name'**: populated from interface OR SAP record and editable
  - b. **'Last Name'**: populated from interface OR SAP record and editable
  - c. **'Phone'**: populated from interface OR SAP record and editable
  - d. **'Address same as Home Address'**: check if applicable, if checked in the ATS will populate OR SAP record
  - e. **Address Line 1'**: if provided, populated from interface OR SAP record and editable
  - f. **'Address Line 2'**: if provided, populated from interface OR SAP record and editable
  - g. **'City'**: if provided, populated from interface OR SAP record and editable
  - h. **'State'**: if provided, populated from interface OR SAP record and editable
  - i. **'Zip Code'**: if provided, populated from interface OR SAP record and editable
  - j. **'Country'**: if provided, populated from interface OR SAP record and view only
3. Administrative Address.

- a. **'Building'**: populated from SAP position record and editable either by directly typing or using look-up
    - i. Search criteria is not required for search to work (can run wide open)
      - 1. **'Suite/Room #' (optional)'**: free form entry, no validation
      - 2. **'Address Line 1'**: display only and populates based on Location ID entered
      - 3. **'Address Line 2'**: display only and populates based on Location ID entered
      - 4. **'City'**: display only and populates based on Location ID entered
      - 5. **'State'**: display only and populates based on Location ID entered
      - 6. **'Zip Code'**: display only and populates based on Location ID entered
      - 7. **'Country'**: display only and populates based on Location ID entered
      - 8. Enter optional **'Phone #'**: (Format: +15173551234X12345)
      - 9. **'Is the employee working off campus?'**: Yes/no dropdown
1. Actual Work Location
- a. Enter optional **'Building'**: directly type or use look up
    - i. Search criteria is not required for search to work (can run wide open)
    - ii. Enter optional **'MSU Issued Cell Phone'**: directly type using format 5173551234
    - iii. Enter optional **'Phone'**: directly type using format +15173551234X12345

## Pay and Cost

- 1. Basic Pay and Cost Distribution
  - a. **'Hourly Rate'**: Enter hourly rate for position
  - b. Enter **'Lump Sum'**
    - i. This Field will only appear for project pay positions
- 2. New Funding (Editable)
  - a. *Note: Labels in this section include both HR/Payroll (SAP) and Finance (KFS) terms. The KFS terminology is in parentheses.*
  - b. Funds are entered as a row in a table by clicking on the plus sign icon.
  - c. A pop-up will appear:
    - i. **'Start Date'**: Either directly type or use calendar look-up
    - ii. **'End Date'**: Either directly type or use calendar look-up
    - iii. **'Fund (Chart/Account)'**: Either directly type or use look-up
      - 1. Search criteria must be entered for search to work (cannot run wide open)
      - 2. Funds are not validated until 'send'
    - iv. **'WBS Element (Sub-account)'**: Either directly type or use look-up
      - 1. Value is required if fund is provided and will pre-populate/default as 'NO\_SUB-ACCOUNT', but can change
      - 2. Search criteria must be entered for search to work (cannot run wide open)
    - v. **'Cost Center (Sub-object)'**: Either directly type or use look-up
      - 1. Value is optional, and search will not be available until fund is entered
      - 2. Search criteria must be entered for search to work (cannot run wide open)
    - vi. **'Order (Project Code)'**: Either directly type or use look-up
      - 1. Value is optional

2. Search criteria must be entered for search to work (cannot run wide open)
- vii. **'Percentage'** : value required
  1. Total percent across all funds provided must equal 100
- viii. **'Functional Area (Org. Ref ID)'** : Either directly type or use look-up
  1. Value is required if fund is provided and will pre-populate/default as '99999999'

### Additional Information

1. Additional Information
  - a. **'Does the employee have relative in the department?'** : populated from interface and editable – Choose yes or no from dropdown selection
  - b. **'Is the CBC Consent Form uploaded to HireRight?'** : Choose yes or no from dropdown selection

### Ad Hoc Approvers

1. Ad Hoc Approvers
  - a. Ad hoc approvers are entered as a row in a table by clicking on the + in the upper right of the table
    - i. A pop-up will appear
      1. Enter **'MSU Net ID'**: Either directly type or use look-up
        - a. Search criteria is not required for search to work (can run wide open)
        - b. Net IDs are not validated until 'send', but name will not update correctly if they are not valid values.
    - b. **'Name'**: display only and populates based on Net ID entered

### Notes

1. Directly type or paste in text that would be helpful for approval or internal record keeping, click save
  - a. Can be edited or deleted before sending as needed.
  - b. Click Save.

### Attachments

1. Attachments
  - a. This form has one required attachment which is for 1585 TOC jobs, but general attachments can be added in two methods
    - i. Using the + icon a pop-up directory will appear to let users search for and select a file to attach
    - ii. The file may also be dragged and dropped from a desktop or other open file directory

### Submit into Workflow

1. Click the 'Send' button in the lower right to send into workflow.
  - a. Any errors will appear in the lower left corner before the form is routed.
  - b. If there are no errors a pop-up will appear with the process reference number
2. Form will route for approval first to any Ad Hoc Approvers, then the hiring Department Approvers, and finally Funding Approvers before going to CHR.

## 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*
  - a. Click **Shortlisted Applications** OR
  - b. 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.
  - a. **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:
5. Application Flags
  - a. See the Flags tip sheet for more information about flags.
6. Current application status
7. Outcome If the application has been Reviewed
  - a. Link to **View** application materials or Applicant Card.
  - b. Users with the permission group of Search Committee will see the applicant's profile, application and resume.
  - c. Users with the permission group of Staffing Coordinator or Dean/VP will see the Applicant Card. See the [Applicant Card](#) section for additional information.
8. 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 about each applicant.

1. From the *Main Menu*, click **Assigned Applications**.  
OR
2. 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.

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.

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.

## Reporting

Reports are contained in one 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.

Staffing Coordinators can run the following reports for a posting via the Job Card – Reports Tab:

- Applicant List
- Department EEO Summary
- Event Bookings
- Reference Checks
- Search Committee Ratings (Primary Staffing Coordinator) \*
- Sourcing & Referrals

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.