Ball State University
HR-TMS Training Guide:
FACULTY
Human Resource’s Talent Management System

Updated September 2017
Human Resource’s Talent Management System (HR-TMS) and PeopleAdmin

As we embrace our role as a model 21st century public research university, we envision our recruitment and hiring practices to be more efficient and convenient for both applicants and hiring managers at Ball State University. We are therefore pleased to be implementing Human Resource’s online Talent Management System (HR-TMS).

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

The online system, HR-TMS, is hosted by PeopleAdmin. PeopleAdmin’s mission is “To help government and education build a better future by providing leading talent management solutions that connect the right people to the right jobs.” They focus exclusively on education and government and have cultivated a deep understanding of the needs within these two sectors, which has enabled them to add value to their customers and the communities they support. They are proud to be a recognized leader in talent management solutions designed specifically for education and government. PeopleAdmin works with more than 700 institutions of higher education and has received numerous awards (http://www.peopleadmin.com/).

It is with great enthusiasm that we present the Faculty portion of the applicant portal along with the Faculty applicant tracking modules. We are pleased to offer you this step-by-step training manual for the Faculty portion of HR-TMS.

Should you have any questions about this exciting HR online recruitment initiative or need assistance in completing an action in the HR-TMS, please email:

ERPHR@bsu.edu
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Login Information:

1. Website address: https://bsu.peopleadmin.com/hr/ or you can find the HR-TMS link here – Click on “My BSU” to locate HR-TMS (People Admin) under Additional Tools.

2. You can log in by clicking on the white “Click Here to log in with your BSU Computer User Name and Password” link or you can click on the white “SSO Authentication link.”

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

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

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

#### Watch for the following Icons:

- This icon indicates that there is missing information in a section which must be completed before next action in workflow can be taken.

- This icon indicates a section is complete, but will still allow editing in some instances.
Module Type Definitions

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

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

User Group Definitions

**Applicant Reviewer:** Reviews applicants per posting and forwards actions to Hiring Manager.

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

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

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

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

**Provost Budget Director:** Reviews and approves position actions funded through the Office of the Provost.

**AVP/Dean:** Can initiate a new position action or modify position description. Approves actions sent from the Chair/Director user group. Forwards actions to Pre-HR Approval for review.

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

**Vice President (Provost):** Can initiate a new position action or modify position description. Approves actions sent from the HR-EEO user group. Forwards actions to Budget for review.

**Budget:** Reviews and approves all position actions for budget confirmation. Forwards action to the VP of Business Affairs group.

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

**President:** Reviews new positions or positions that are over budget. Forwards actions to HR user group.

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

**Please note:** Individuals may have only one user group or may be assigned to more, depending on their role within the approval process for actions. Position action can include: initiating a posting form, creating or modifying a position description, or approving a position and/or hiring proposal.

(See Faculty Decision Trees - Pages 36-42)
Position Management Module
(Orange header background – changes to blue when you are in Applicant Tracking module)

To select the position management module, click on the drop-down menu button located in the top right corner of the home page and select Position Management.

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

Core Functions of the Position Management Module

- View, create, or modify your Faculty position descriptions. **NOTE:** if you are adding a new position for your area, please consult with your Budget Director **FIRST** before using TMS. Your Budget Director might utilize an existing position number for your new position. In this case, you would modify that existing position number in TMS versus creating a new position in TMS. Additionally, if you are replacing someone in an existing position, you should be able to find it under Faculty Positions in TMS and modify it.

- Obtain the necessary approvals to post a Faculty position

- Make title, compensation, FOAP, supervisor changes for incumbent

- Access active position description requests
Creating a New Position Description (New Position Request):

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

2. Hover over Position Descriptions and select Faculty.

3. Click the button at the top right corner.

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

5. Enter the proposed Position Title.

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

7. If you have an existing position description within your department(s) you wish to copy or ‘clone,’ click on “Filter these results.” You can search for the position description you would like to clone by searching on a title, position number, or department and then clicking on Search.
8. Once position has been located, click on the radio button next to the title of the position you wish to clone.

<table>
<thead>
<tr>
<th>Position Number</th>
<th>Position Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>100683</td>
<td>Assistant Professor</td>
</tr>
<tr>
<td>100684</td>
<td>Associate Professor</td>
</tr>
<tr>
<td>100685</td>
<td>Assistant Professor</td>
</tr>
</tbody>
</table>

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

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

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

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

   - **Position Justification**: State justification for new position request. Indicate if this position will be posted and if a search committee will be used. Salary information is required for the position.
   - **Position Details**: Enter position details, such as the description, duties and responsibilities, education and experience required, and supervisor’s position number. If a new position is being created, Human Resources will assign a new position number after position request has been moved to HR in the approval workflow.
   - **FOAP Details**: Identify funding sources for this position. Grant funding is also identified in this section. Please enter organization title as well as percentage funded.
   - **Supervisory Position**: Select supervisor’s position from list.
   - **Position Documents**: Upload optional supporting documents for the new position action.
   - **Position Request Summary**: On the Position Request Summary page, prior to taking action, you will review for accuracy all of the information you entered into the request or make additional edits if necessary.
13. Once you have reached the Position Request Summary, you can take action by hovering over the Take Action on Position Request button at the top right hand corner of the page and select one of the following:

![Take Action On Position Request](image)

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

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

15. You will receive a blue bar on the top of your page that will state the action was successfully transitioned.
Modifying an Existing Position Description:

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

2. Hover over Position Descriptions menu and select Faculty.

3. Search for and select the position description you wish to update.

4. Click the Modify Position Description link within the position summary (upper right hand corner).

5. Click Start on the modify position description page.

6. The following is a list of the sections within the Modify Position Description Action that will need to be completed. The sections that have a check mark next to the section indicate all required fields have been completed:
7. To take action, hover over the Take Action on Action button at the top right hand corner of the page and select one of the following:

- **Request Changes for Current Employee**
- **Position Details**
- **FOAP Details**
- **Employee**
- **Supervisory Position**
- **Position Documents**
- **Position Request Summary**

Enter the reason for position modification. Enter information that will be carried over into the posting - indicate if this position will be posted, if a search committee will be used, and salary information if creating a posting.

Enter any changes being made to a current employee’s position - replaces the P-3.

Update position details, such as the description, duties and responsibilities, education and experience required, and supervisor’s position number.

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

If you are preparing the position description for posting due to a vacancy, you can vacate the current employee that is currently linked to the position description.

Select supervisor’s position from list.

Upload optional supporting documents for the new position action.

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

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

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

**Position Management Module**

**Approving a Position Description Action:**

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

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

3. Locate the title of the Position Description in your Inbox you wish to take action on. Click on the title.

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

Posting Information

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

- Will this position be posted as soon as the position description is approved?
  - Please select
  - This field is required.

- Will a search committee be used?
  - Please select
  - This field is required.
  
  If Yes, search committee training is required. Please contact Director of Employee Relations: Melissa Rubrecht to schedule a training session.

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

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

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

8. You will receive a blue bar on the top of your page that will state the action was successfully transitioned.
Applicant Tracking Module

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

To select the Applicant Tracking module, click on the drop-down menu button located in the top right corner of the home page and select Applicant Tracking.

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

Core Functions of the Applicant Tracking Module:

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

Creating a New Posting:

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

2. Hover over Postings and click Faculty.

3. Select the orange "+ Create New Posting" button.

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

6. Each of the posting sections are described in detail on the following pages.

### Posting Details

1. **Posting Information Section**: most information is this section will default into the page from the position description. Some fields are either optional or required. Required information will be indicated by a red asterisk and a red box. Position Number, Description, Duties and Responsibilities, Minimum Qualifications, Preferred Qualifications, Positions Supervised, EEO Statement are not
editable. If you would like to edit any of these fields, you will need to follow the “Modify Position Description” process in the Position Management module. Please note: you may select more than one option in the required Pre-Employment Screening Box.

2. **Posting Detail Information Section:**

   **Number of Vacancies** – number of candidates you are looking to hire for this position – will usually be one (1).

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

   **Position End Date** – used for assignments that have an end date. If no end date, leave field blank.

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

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

   **Number of Calendar Days that Applications will be accepted** – select number of calendar days between 14 and 90 that you would like posting to remain open. For tenure-track vacancies, the minimum is 30 calendar days.

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

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

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

   **Special Instructions Summary** – optional – input specific instructions to help the applicant fully complete his/her application.

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

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

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

1. Supplemental questions are available for you to use in order to do some screening of the applicants. If you would like to use a supplemental question, please click on [Add a question]. You may choose questions from those available by category or by keyword.

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

3. Create a name for the question (e.g. Faculty – Degree, Faculty – Certification). Choose a name that describes the question and/or uses terminology that might be used when conducting a search for a specific question.

4. Select a category for your question from the drop down list (Education, Experience, or Other).

5. Enter the question you would like to use in the Question text box.

6. You will need to select which type of answer will be needed for your question:
7. Open ended answers allow the applicants to respond with whatever answers they choose.

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

9. Once you have selected the supplemental questions you would like to ask, click on submit.

10. In order to make sure the supplemental question is required, you must select the required box.

**Applicant Documents**

Applicant Documents are the documents and information the applicant is required to submit with his or her application. Select the “Required” selection for any documents that you would like to require the applicant to submit for evaluation. Since the Faculty application does not require the applicant to enter any employment or education information, curriculum vitae should always be a Required document. The Hiring Manager may decide to require transcripts at the time of interview instead at the time of application. The transcripts then can be Optional in this situation. You may change the order in which they are listed by:
Recruitment Plan

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

1. To select one or more of the Frequently Requested Sources, click on the box next to the source you would like to use.

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

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

4. Please indicate any other department listservs or email burst placed by department. To do this, click on the “Add Other Department-Initiated Listservs or Email Bursts Placed by Department” button.
5. Enter the name of the source and indicate if it is a diversity recruitment source by selecting “yes” or “no” using the drop-down menu.

6. Information under “Contact Information for Advertising” should come over from the questions you answered when you created or modified your position for posting.

**Guest User**

The Guest User feature is intended for those individuals who are not an employee of Ball State University but will be serving on a committee for a specific search. You will usually use this feature if you have an outside community member or BSU student on your search committee. A Guest User will be able to view the applicants and application materials for the search he/she is given access to. He/she will not have the ability to make any actions on applicants.

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

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

**Search Committee Members**

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

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

2. Once you see the employee you would like to add to the search committee, click on the Add Member button.
3. If the employee will also serve as the Committee Chair, you can select the checkbox next to the Add Member button.

4. The blue **Create New User Account** button is not active at this time. To request Search Committee user role for an employee, please complete a request through the Help Desk. Click [here](#) for instructions.

5. Human Resources will then assign the Search Committee user role to that employee. (Please note that assigning Search Committee user role to an employee is the first step. The second step is for the Hiring Manager to add that user to the Search Committee tab in the posting. HR assigning of the general Search Committee user role in itself does not allow that user to review applicants in a posting.)

**Reference Letter Feature**

1. HR-TMS has the functionality to automatically solicit letters of recommendation from individuals that the applicant selects on their application to receive a recommendation letter request. The current faculty application is configured to require a minimum of three professional references. You can edit this feature to increase or decrease that amount:

   If you would like for TMS to automatically solicit letters of reference from the Professional Reference contact information provided by the applicant, your HR Representative can explain the functionality and answer any questions you may have about this process.
Summary

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

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

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

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

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

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

View Job Posting:

1. Verify you are in the Applicant Tracking module in the Applicant Reviewer user group.

2. Hover over Postings and select Faculty.

3. You have two options to view the posting. You can either click on the blue position title or you can click on the blue Actions drop-down menu on the right-hand side of the posting line and select View Posting. In the Actions drop-down menu you can also add the posting to your Watch list.
4. The following tabs are available with additional information associated with your posting: Summary, History, Settings, Applicants, Reports, Hiring Proposals, and Associated Position Description.

**Posting: Assistant Professor of Special Education (Faculty)**

- **Summary Tab** – Shows a summary of the posting.
- **History Tab** – Shows a history of user actions taken on the posting.
- **Applicants Tab** - Click the Actions button on the right-hand side of the Applicants tab for more applicant review options.

Review Supplemental Question Answers allows you to see an applicant’s results.

Download Supplemental Questions Answers allows you to export into Excel for further review.

Export Results allows you to export the table of selected applicants into Excel.

Download Applications as PDF will let you choose which documents to combine into a single PDF file (from the selected applicants).

Create Document PDF per Applicant will take the selected applications and create one PDF document with their applications and documents.
Reports Tab – will show you any available reports for that position. To access a report, click on report name.

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

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

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

Viewing Applicants/Changing Applicant Statuses:

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

2. Hover over Postings and select Faculty.

3. Locate the posting and click the Actions menu and choose View Applicants.
4. Either click on the applicant’s last name **OR** click the ‘Actions’ menu for each application and select View Application.

![Image of the HR-TMS interface with active applications and an option to view an application.]

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

![Image of the Take Action on Job Application window with various options to select.]

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

A Take Action box will pop up; and you will need to select the reason. The drop-down menu button will not show; you can either click where it says *please select* and the reasons will appear or you can click and drag the lower right-hand corner of the box to make the box bigger and the menu button will appear. Make your selection and then confirm by clicking submit in the Take Action pop-up window.
Continue the steps until all applicants you are not interviewing have been moved through appropriate workflow actions to update their status. See workflows on pages 36-42 for guidance.

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

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

A “Take Action” pop up window will appear. You will need to click on submit.

Once you have reviewed your applicants and have moved those applicants you wish to interview into the Select (move to Request for Interview) workflow state, **you will then need to move them to the next workflow state of AVP/Dean**. Your HR Representative and HR-EEO will review each applicant’s qualifications to verify their eligibility for interview as well as ensure transcripts are uploaded. HR-EEO will move the applicant into Approved for Interview.

6. Once an Applicant Reviewer has identified the applicant to hire into a Tenure or Tenure Track Faculty (F1) or a Full-time Contract Faculty Academic Year (F3) position from those who have been approved for interview, select **Recommend (move to Recommend for Hire)** in the Take action on Job Application drop-down menu. An email will be sent to Human Resources which will initiate the background check. The Hiring Proposal may be entered at this time. Human Resources will notify the Hiring Manager when the background check is complete.
7. Move remaining applicants who were interviewed, but not selected into the Do Not Select (move to interviewed, Not Hired – Email when filled) by clicking on the orange Take Action on Job Application drop-down menu.

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

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**Applicant Tracking Module**

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

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

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

2. Hover over ‘Postings’ and select Faculty.
3. Locate the posting and click the ‘Actions’ menu and choose view applicants.

4. Select applicant you would like to start the hiring proposal for by either clicking on his/her name or using the Actions button at the end of his/her line and selecting View Application. This workflow replaces the EPAF for these types of positions.

5. Click on Start Hiring Proposal.
6. Position should already be selected; if not, click on the button beside the correct position title.

7. Then click **Select Position Description**.

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

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

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

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

- **Position title if different from above** – if title is different from what title was in the posting, a Recommendation for Unusual Appointment form is usually required and can be attached in the Hiring Proposal.

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

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

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

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

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

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

- **End Date** – required if this is a contract position.

- **Factor** and **Number of Pays** fields – required if this is a contract position. Chose “None” for Tenure or Tenure Track faculty.
**Employee’s Building/Room** – optional – if you know the building and room number the new employee will be working in, you may enter it here. This information will populate over into the BSU People Directory.

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

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

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

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

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

10. The Hiring Proposal Summary allows you to review the hiring proposal and make any necessary edits before you take action on it. Once all fields have been checked and the required fields completed, click on Take Action On Hiring Proposal. You can either keep it at your stage of the workflow if you are waiting on additional information or you can move it to the next workflow state for approval.
11. You will receive a Take Action pop up window which will send an email in Outlook to the next approver to notify him/her an action is pending. Please note, comments will be tied to the historical record of this action. Check the box to include the action on your watch list and then click Submit.

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