PeopleAdmin Training Guide

Last Modified: 09/2018

WHAT IS PEOPLEADMIN ?

PeopleAdmin is our Talent Management solution for our school's recruitment needs. Through PeopleAdmin we can streamline the hiring process by advertising job positions, managing position descriptions (for staff only), onboard employees and conduct EEO reporting with the analytics reporting capabilities.

CONTENTS REFERENCE GUIDE

PEOPLEADMIN MODULES

- **Hire** (*previously Applicant Tracking*)
  - Through the **HIRE** module you can:
    - post positions or view old postings (*from your department or to positions you have been tied to*)
    - You can generate hiring proposals
    - If you have access as an Applicant Reviewer or Search Committee Chair you have the capabilities to deselect candidates.

- **Positions** (*previously Position Management*)
  - Through the **MANAGEMENT** module you can:
    - Update any STAFF position description by going through the position modification process
      - NOTE: All positions must go through this process if they are recruiting and changes are being made to the position
    - If you are a Hiring Manager or Supervisor you can see all of your direct reports
    - You have access to view SHRA Classifications which are managed by North Carolina Office of State Human Resources (OSHR)

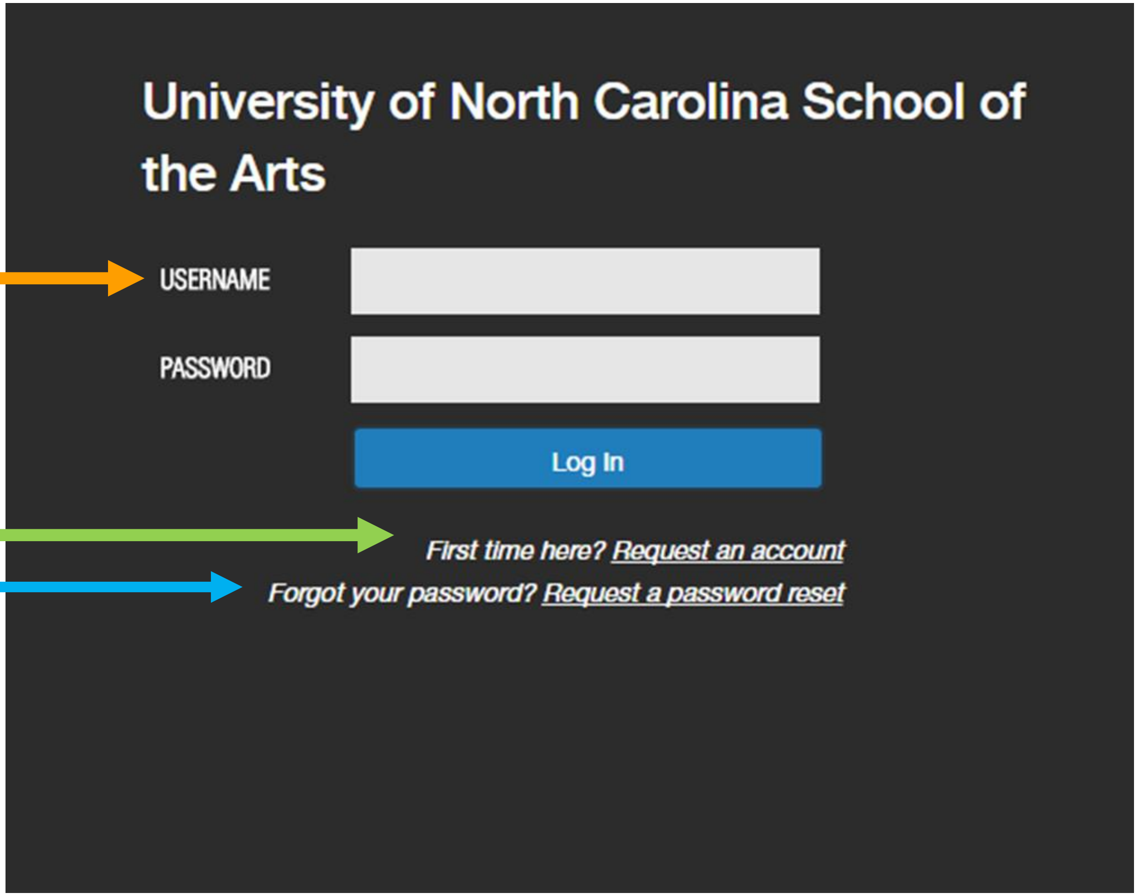
- **Onboard** – NEW
  - Through the **ONBOARD** module, we have the capability to:
    - Deliver a new experience to engage employees through an automated process
      - We will be collecting Tax forms, parking information, I-9, the employee data sheet, etc.

LOGGING IN

- Our employee portal url is https://employment.uncsa.edu/hr
- Our employment site to apply for positions is https://employment.uncsa.edu/

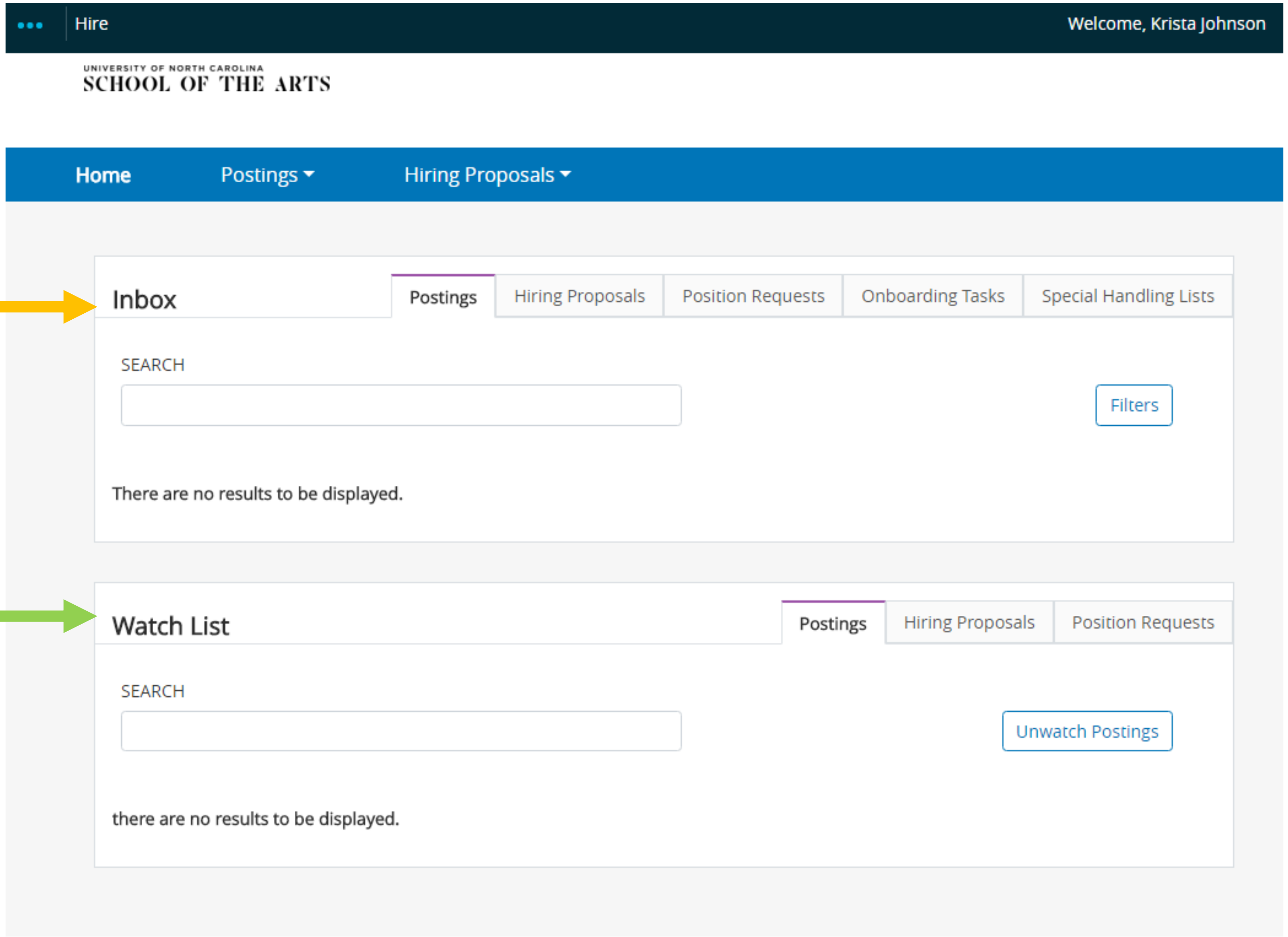
LOGIN PAGE

- Logging In
  - Login with your account username and password.
    - Initial user login and password will be your 96 employee number.
- New Users
  - New Users can request a new user account by pressing the ***Request an account*** link. This will put the user into pending status. The system will send an email to the Administrator. The Administrator will have to approve the user before they can log in.
    - ***Note: UNCSA employees should not request a new account because they are already in the system, (even new hires).***
- Forgot your Password?
  - If you forgot your password, click the ***Request a Password Reset*** link and the system will email the user a link to reset their password.



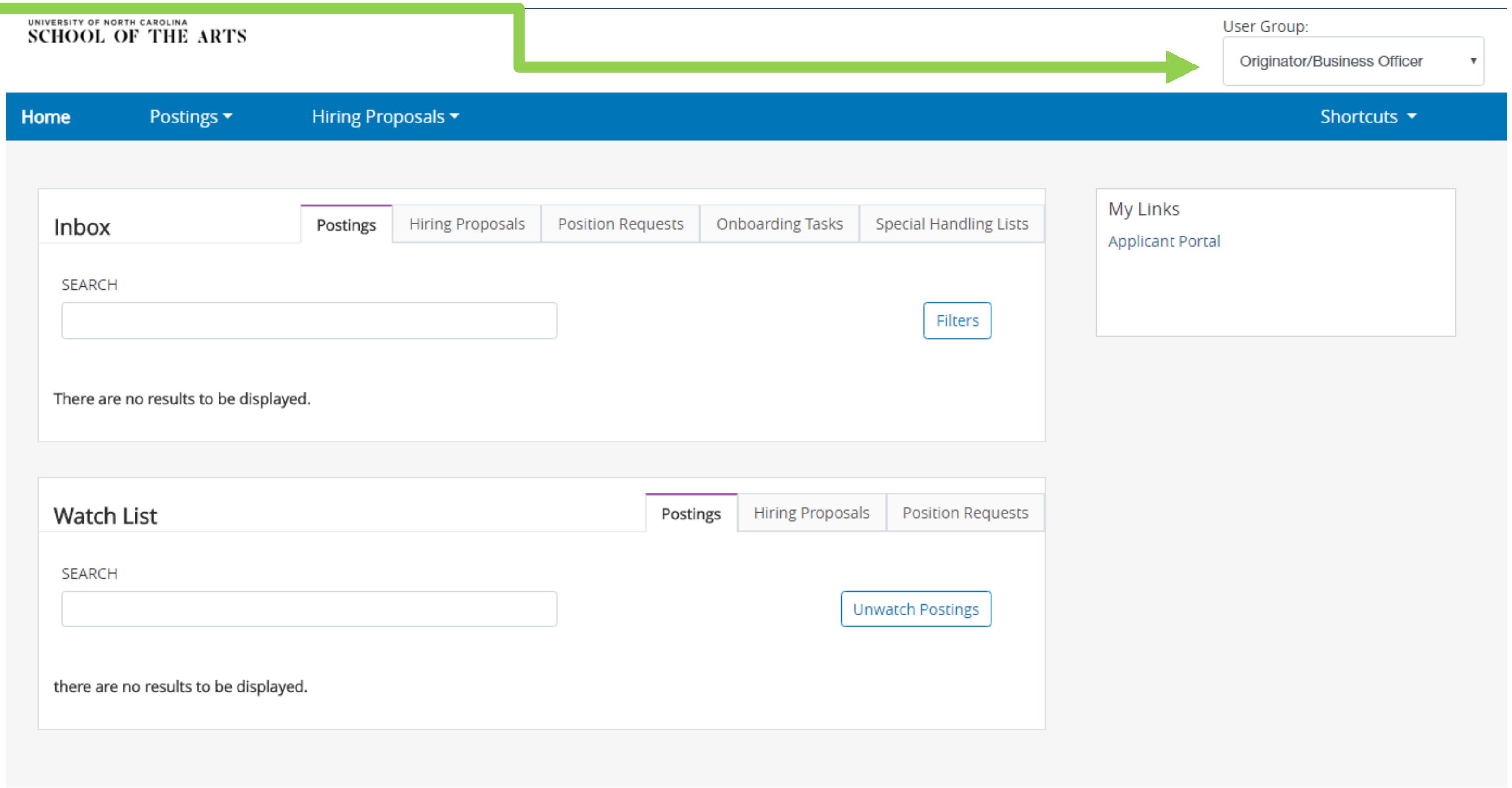
HOME PAGE

- Inbox
  - The inbox is a notification area where the system will **display any items that you need to act upon** *(you will see a number appear beside the heading that is requiring an action).*
- Watch List
  - The watch list displays any item that you have flagged to be put on your watch list. We will see this later on in the demo.
    - (Note: the tabs that display for the inbox and Watch List will depend on your permissions. You can always quickly access these notification areas wit the button at the top of the screen)



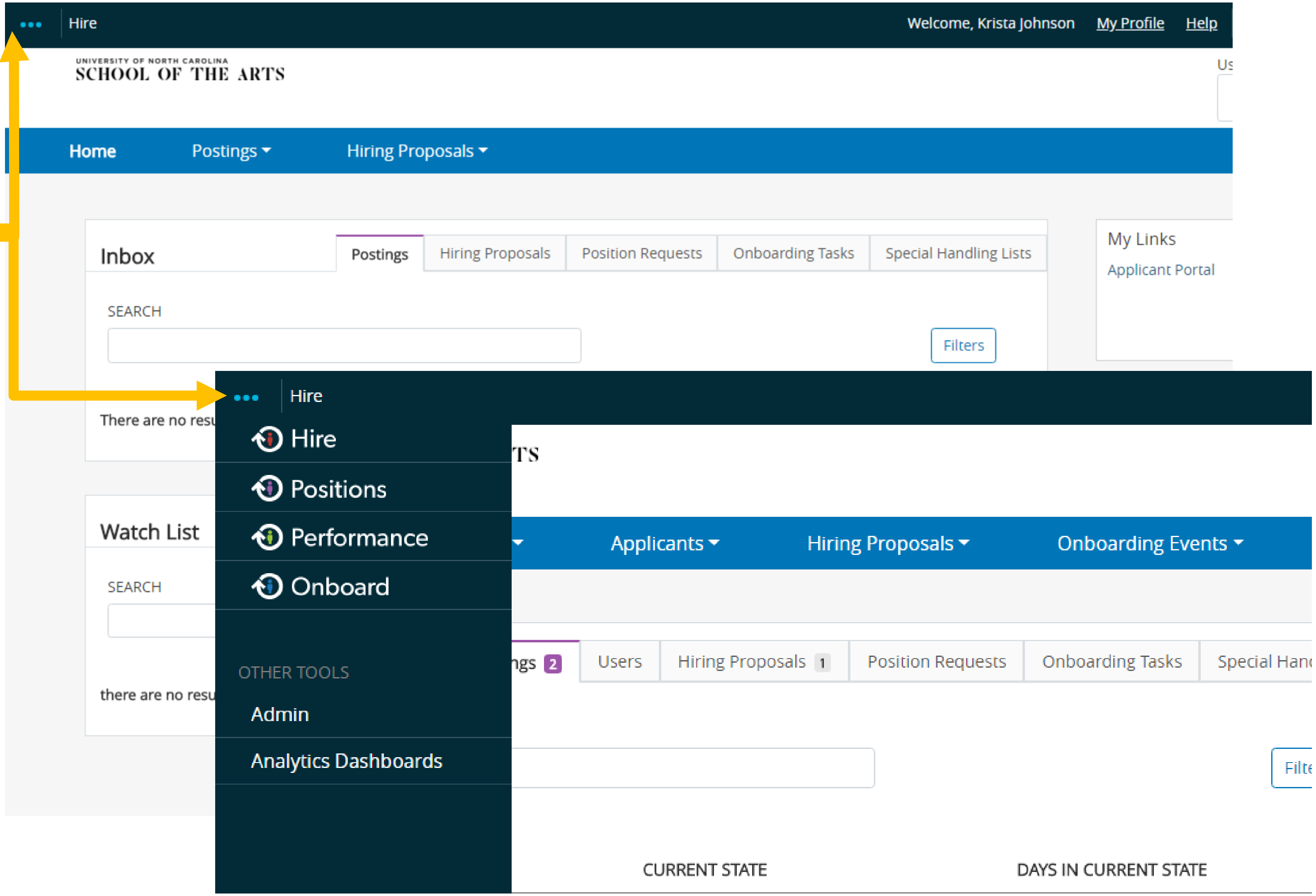
HOME PAGE

- User Drop Down Menu
  - When you log in, you may come to the HIRE homepage. Depending on the user group you are logged into, you will see the menu options that correspond to your user permissions.
  - The drop-down menu will only be available if you are assigned to multiple user groups, otherwise, you will not have a drop-down menu and you will simply be logged in as your user default.



HOME PAGE

- Module Section
  - In the top left section of the screen, you will see three blue dots. If you click here, you will have the option to transition to the other modules.



HOW TO SUBMIT REQUEST FOR A NEW POSITION

FOR SHRA/EHRA STAFF POSITIONS ONLY

To request a new position:

Please make sure Human Resources has delegated authority of the position. If we do not have delegated authority for a position, a position request packet will have to be submitted to the Human Resources Advisory Board (HRAB).

Please contact our Classification and Compensation Analyst for more information.

Aretha Sutton - 336-770-1377

Once the position has been approved:

- Human Resources will enter the new position into PeopleAdmin and send you an email noting the position has been finalized and approved.
- At this point in the process, the department can begin routing the approved position to post.

ANY QUESTIONS?

HOW TO MODIFY A POSITION DESCRIPTION

FOR SHRA/EHRA STAFF POSITIONS ONLY

To reclassify a position:

Please make sure Human Resources has delegated authority of the position. If we do not have delegated authority for a position, a position request packet will have to be submitted to the Human Resources Advisory Board (HRAB).

Please contact our Classification and Compensation Analyst for more information.

Aretha Sutton - 336-770-1377

Reclassifying a STAFF position:

- If the department is planning to reclassify a staff position, you will need to fill out a FORM 201 and attach the required documents. If you have any questions about this process please contact Aretha Sutton, 336-770-1377.
- When modifying a position, this should only be done to update the responsibilities and duties or update the budget information prior to posting the vacant position.

Routing Process

Originator / Business Officer

Responsible for originating the process and filling out all necessary fields for the Posting / Hiring Proposal

Hiring Manager / Dean / Department Head

Responsible for verifying the information being routed is accurate and adding the Supervisory Position

Initial HR Review

Responsible for verifying the information presented has no conflicts with HR policy and procedures

Summer Intensive Budget / Budget

Responsible for ensuring the position # is vacant, checking to ensure the account and fund #'s are correct & the department has the budget to cover the position

Cabinet Level Approver

Responsible for verifying information is accurate

Final HR Review

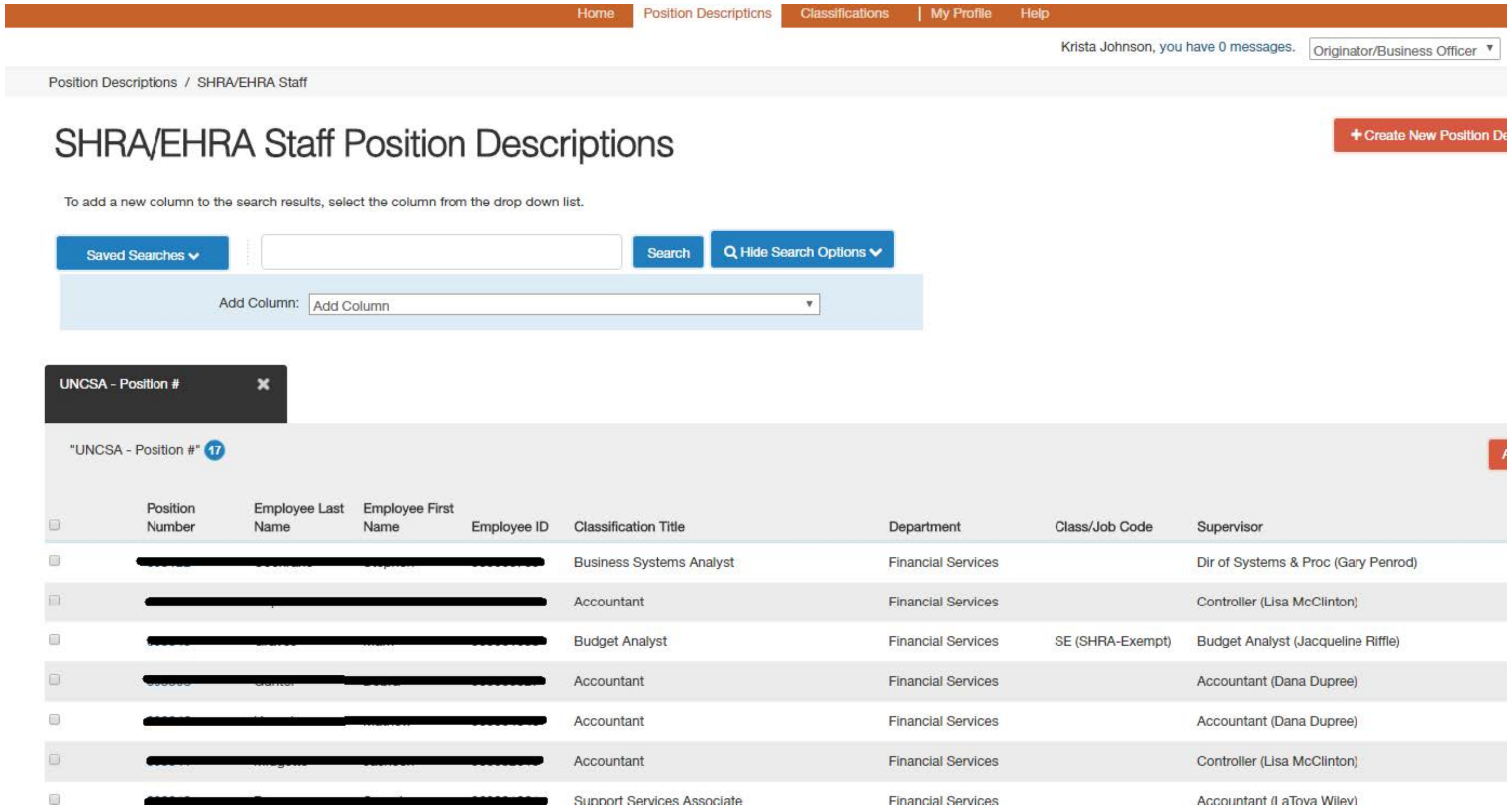
At this point HR is Responsible for Approving the Position

NOTE: Cabinet Level Approver is not the Chancellor's Cabinet Group. This is either the CFO, Provost or Chancellor's Office.

POSITIONS

Note: Be sure you are in the correct group status to start a position description:

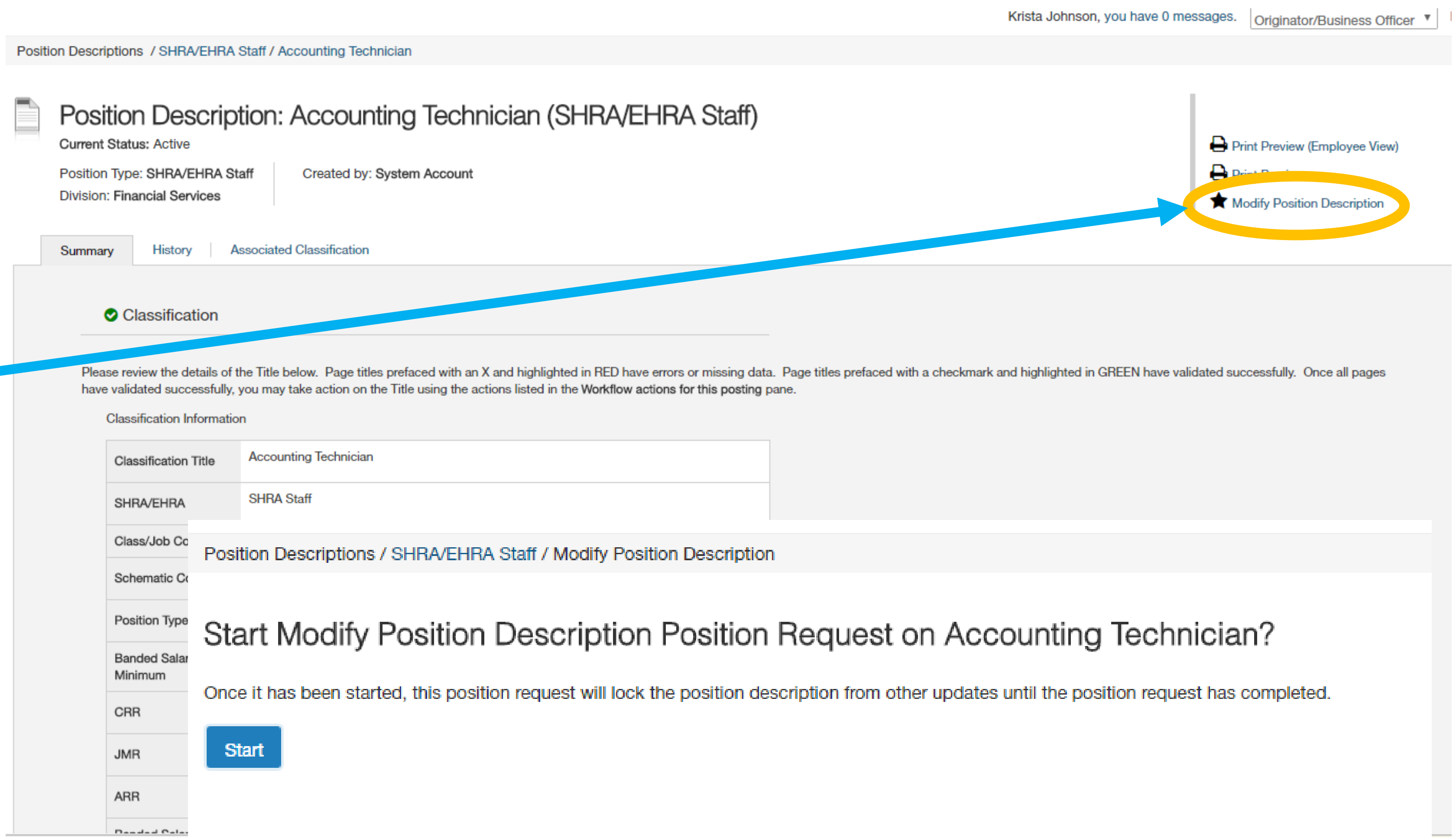
- Hover over the module selection drop-down menu and select ***Positions.***
- Hover over the Position Descriptions Tab and click the SHRA/EHRA Staff.
  - This takes you into the Position Description list screen where you choose a position in your department to modify.



- Modify Position Description:
  - Step 1: Choose the correct position you need to modify, by clicking on the position number to view the position.

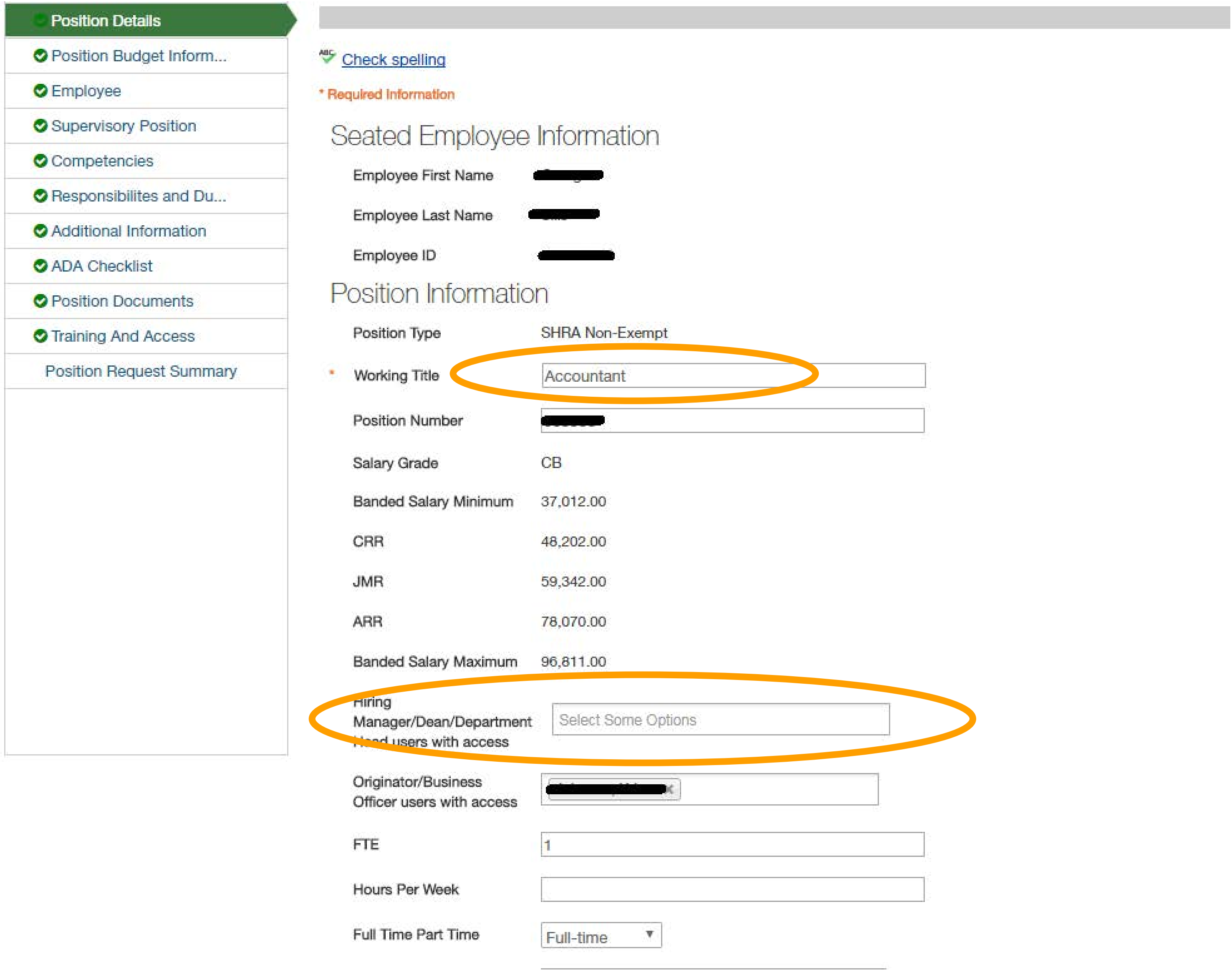
POSITIONS

- Modify Position Description:
  - Step 2: In the right-hand corner select “Modify Position Description.”
  - Step 3: A pop-up box will ask if you would like to start the modify position request, please select START.



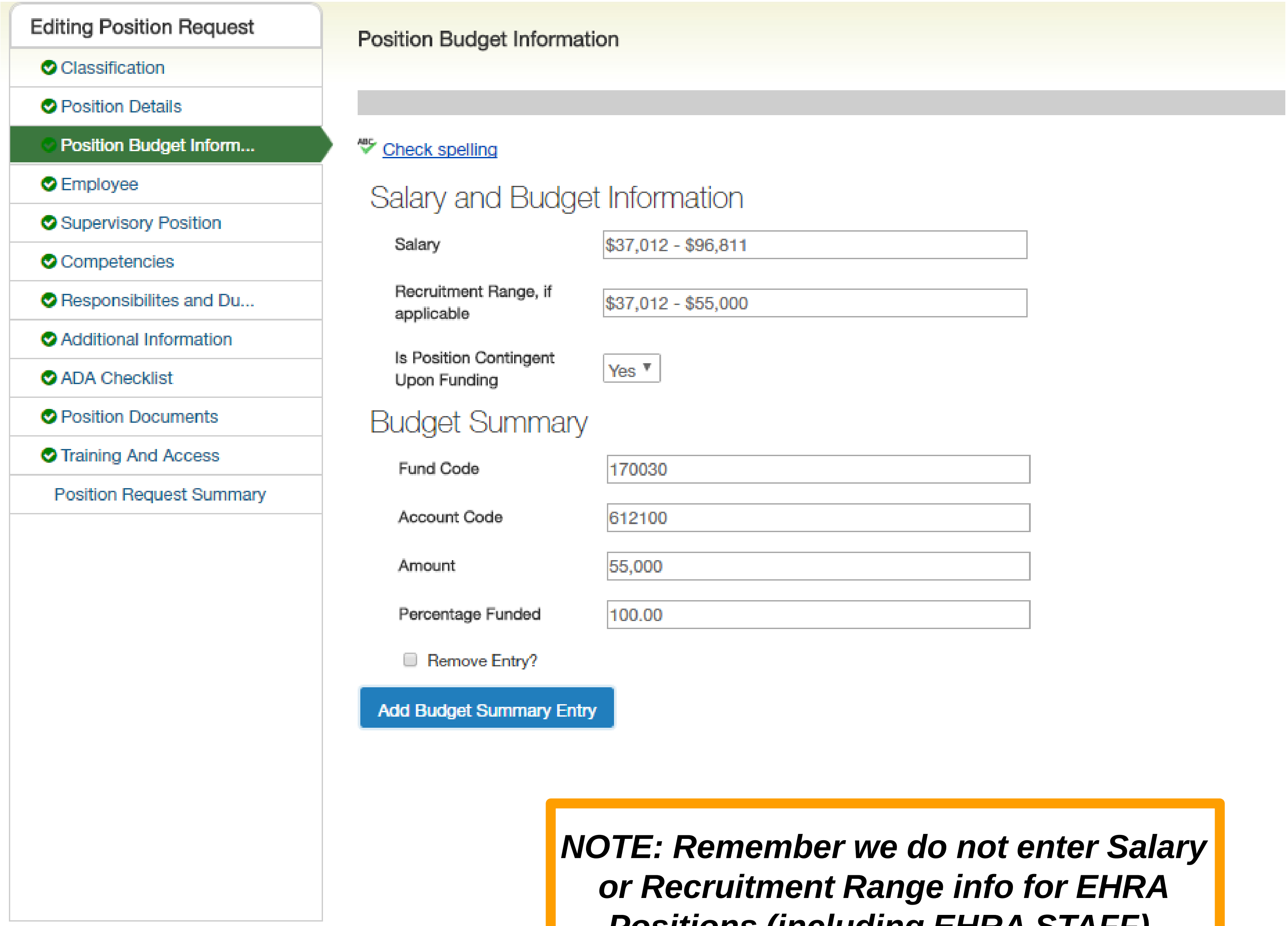
POSITIONS

- Modify Position Description:
  - Step 4: Update any information on the **Position Details Tab** such as:
    - Hiring Manager/Dean/Department Head
    - Originator/Business Officer
    - FTE
    - School Department Information
    - Description of Responsibilities/Duties
    - Preferred Qualifications
    - Knowledge, Skills, & Abilities
    - **Save then continue.**



POSITIONS

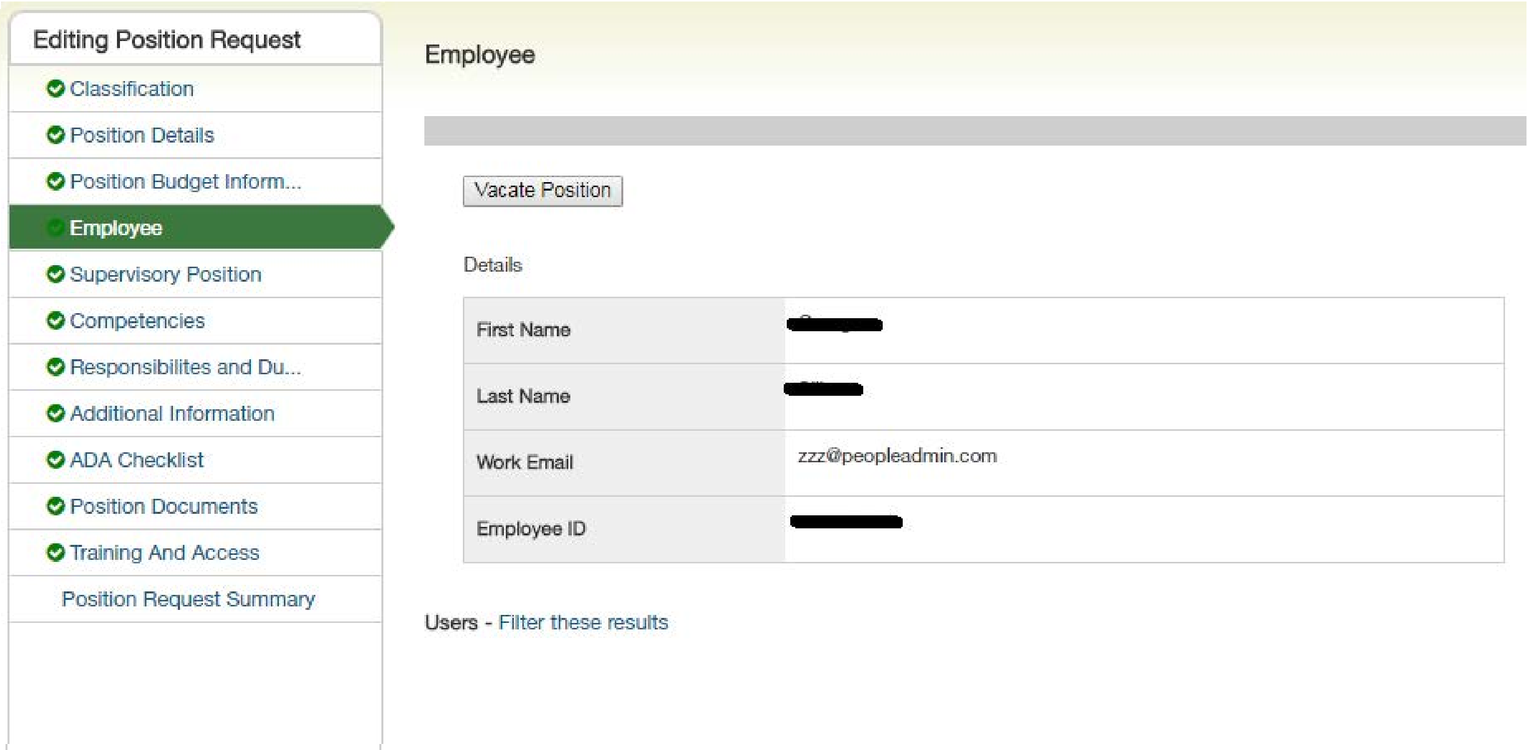
- Modify Position Description:
  - **Step 5**: Update the **Position Budget Information Tab** such as:
    - Salary
      - **Min-Max $ amounts are listed on the classification tab for STAFF Positions**
    - Recruitment Range
      - Min $ amount from Classification to Highest Max Allotted for Position (based on departmental funding).
    - Budget Summary
      - Fund Code
      - Amount Code
      - Amount
      - % Funded
        - If Split funded add another Budget Summary Entry
    - **Save then continue.**



NOTE: Remember we do not enter Salary or Recruitment Range info for EHRA Positions (including EHRA STAFF).

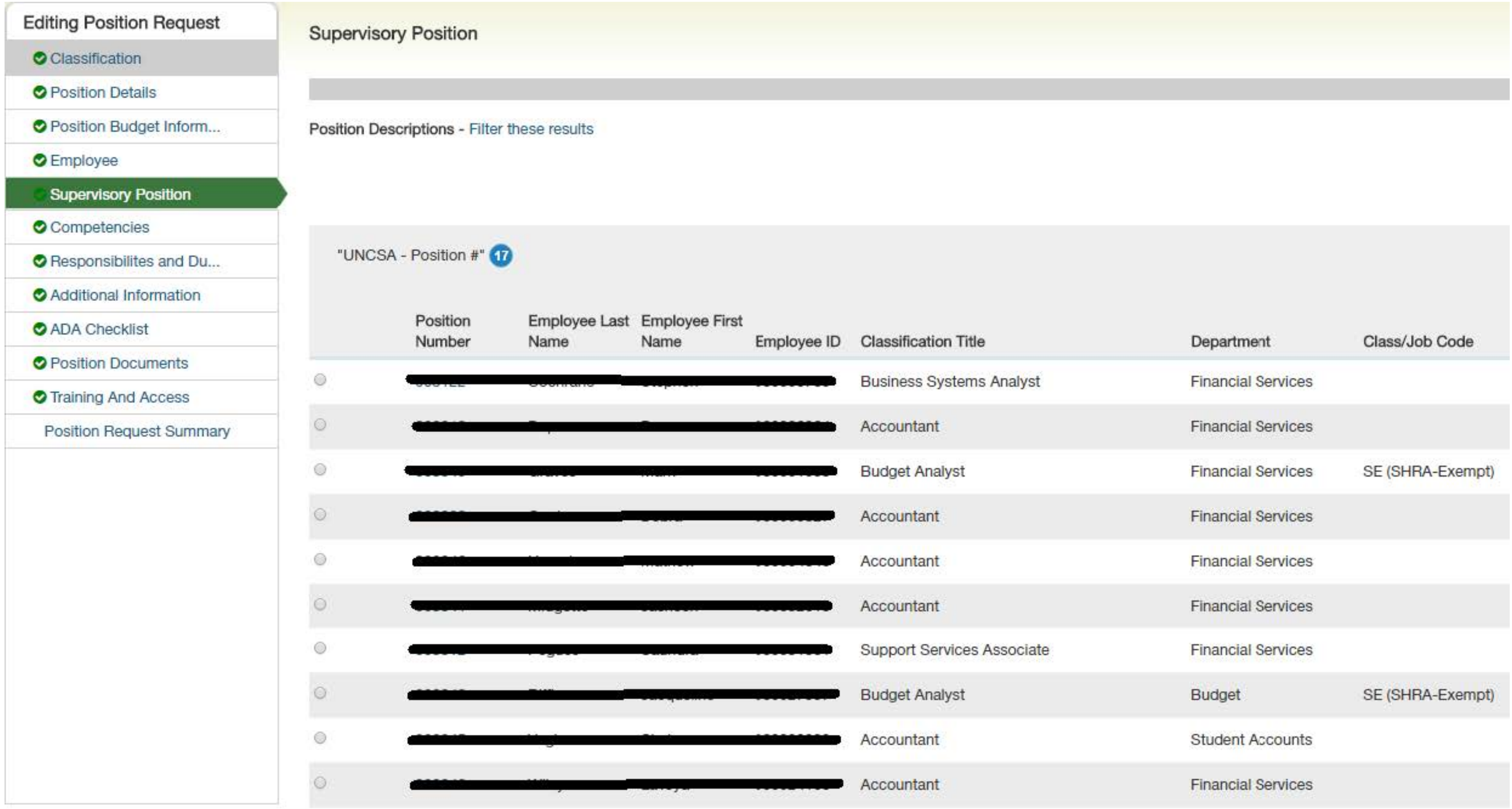
POSITIONS

- Modify Position Description:
  - Step 6: Update the **Employee Tab** (optional):
    - If you wish to vacate this position prior to posting, you can do so. However, once someone is hired, they will automatically be seated in the position.
  - **Save then continue.**



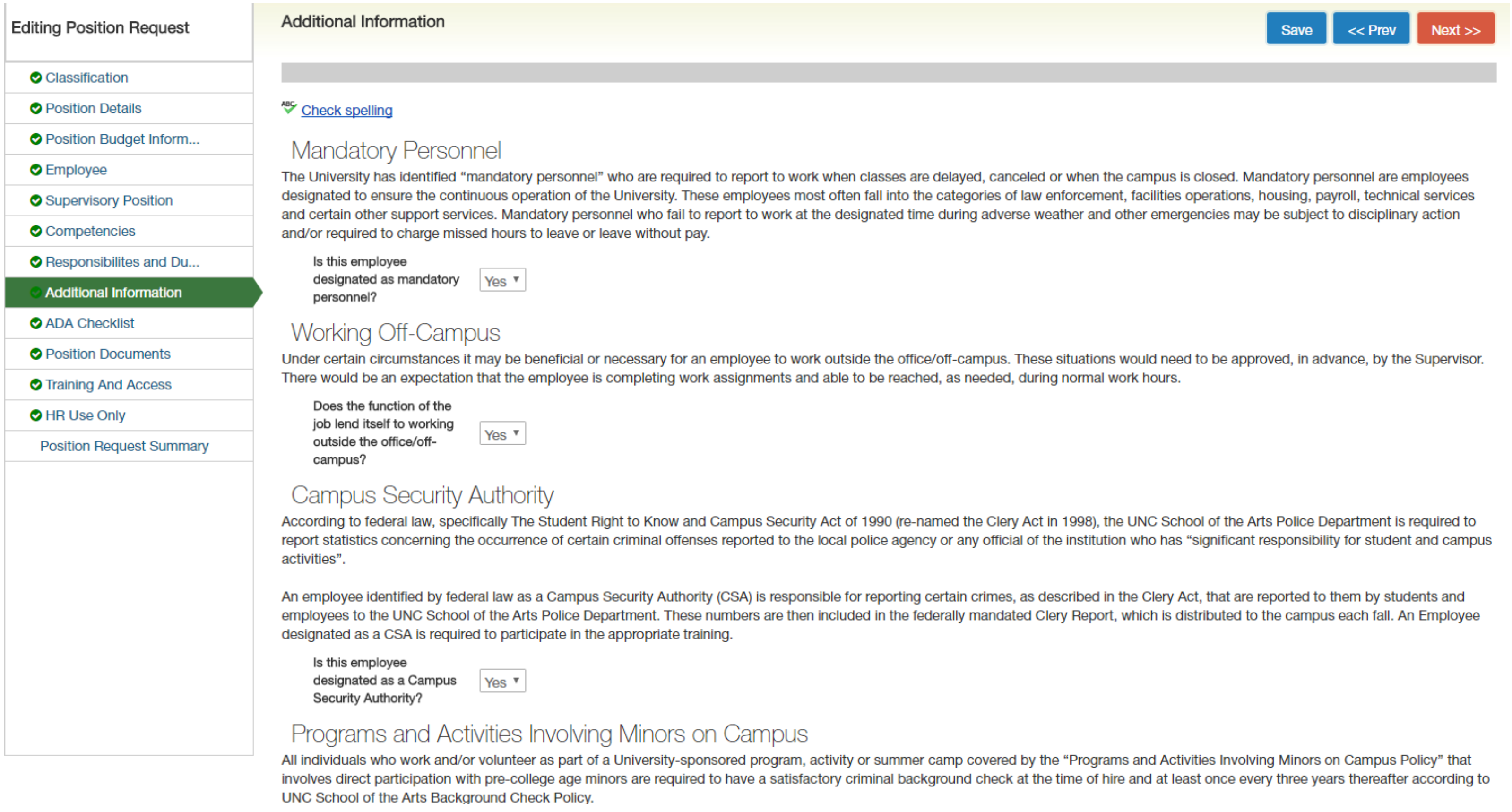
POSITIONS

- Modify Position Description:
  - Step 7: Update the **Supervisor Position Tab**:
    - If you need to update the Supervisor listed for the current position, please filter results to search for the appropriate position number/person.
    - **Save then continue.**



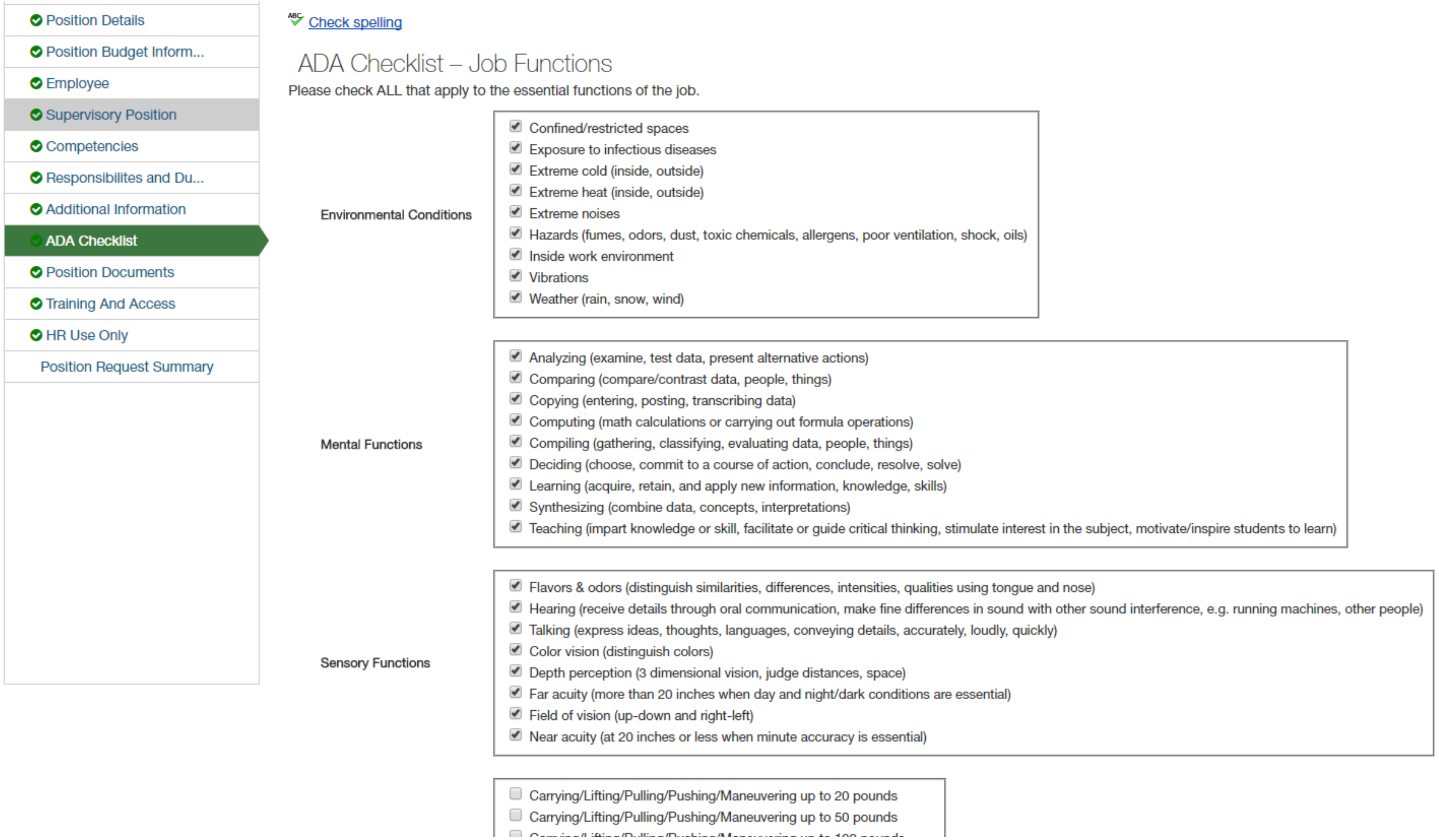
POSITIONS

- Modify Position Description:
  - You can skip over the following tabs:
    - Competencies
    - Responsibilities and Duties
  - Step 8: Enter any information from the "Additional Information" Tab.
    - Is this position considered mandatory personnel?
    - Will you allow this position to work off-campus?
    - **Is this position a Campus Security Authority?**
    - Will this position work with or volunteer in programs or activities that involve minors?
    - Work Location – Does this person have an office space, if so what is the building or office number.
  - Click Save then hit Next to continue.



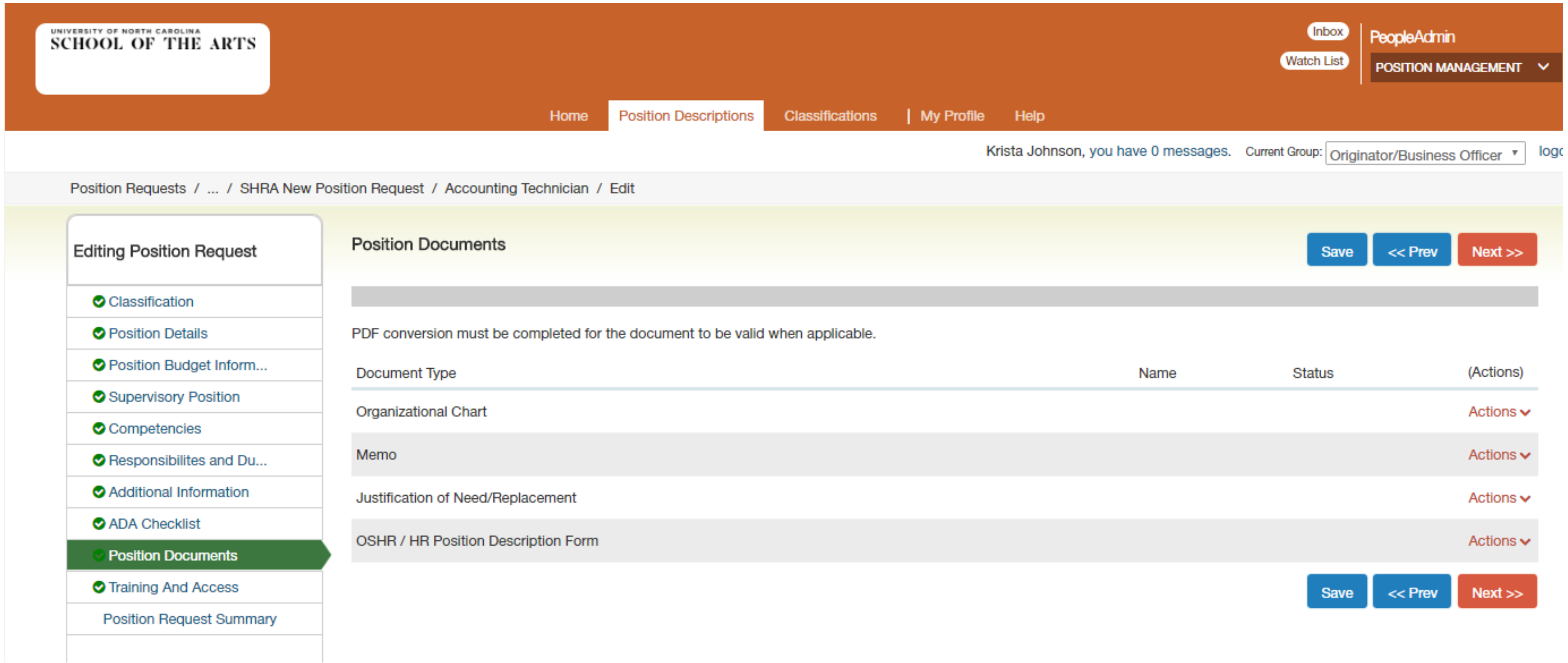
POSITIONS

- Modify Position Description:
  - Step 9: Enter any information from the "ADA Checklist" Tab
    - Environmental Conditions
    - Mental Functions
    - Sensory Functions
    - Working Conditions and Physical Demands
    - Other
  - Click Save then hit Next to continue.



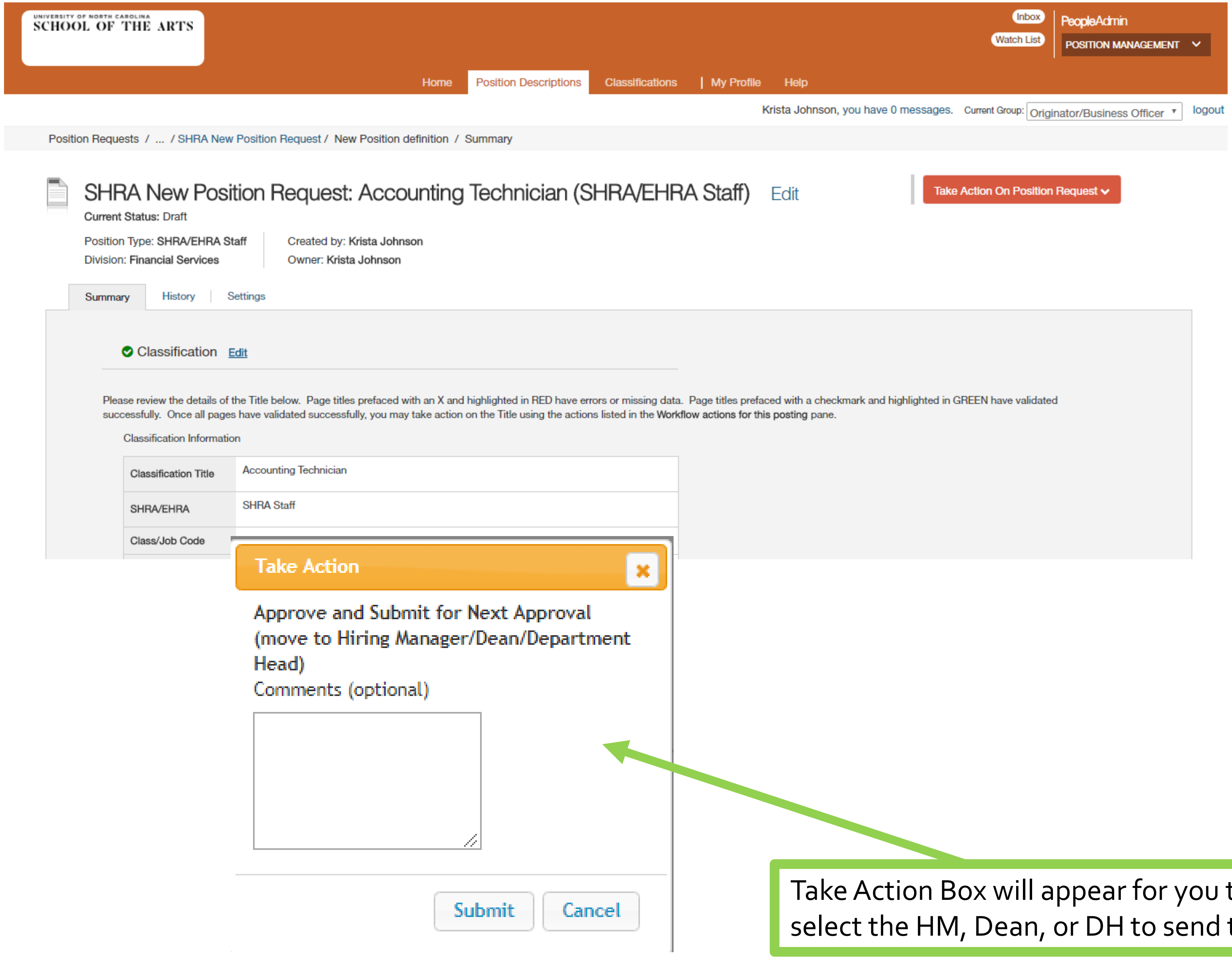
POSITIONS

- Modify Position Description:
  - Step 10: Please submit All Document Types listed except for a Memo.
    - *<u>A memo is not required</u>*
  - **Note 1**: **SHRA STAFF** will submit the OSHR Position Description Form.
  - **Note 2**: **EHRA STAFF** will submit the HR Position Description Form.
  - Click Save then hit Next to continue.



POSITIONS

- Modify Position Description:
  - Step 11: Click on Position Request Summary.
  - Review all information.
  - Click on the orange "***Take Action on Position Request***" button then submit to the Hiring Manager / Dean / Department Head.



Take Action Box will appear for you to select the HM, Dean, or DH to send to.

ANY QUESTIONS?

HOW TO SUBMIT A REQUEST TO POST A STAFF POSITION

FOR SHRA/EHRA STAFF POSITIONS ONLY

Routing Process

Originator / Business Officer

Responsible for originating the process and filling out all necessary fields for the Posting / Hiring Proposal

Hiring Manager / Dean / Department Head

Responsible for originating the process and filling out all necessary fields for the Posting / Hiring Proposal
Responsible for verifying the information being routed is accurate

Initial HR Review

Responsible for verifying the information presented has no conflicts with HR policy and procedures

Summer Intensive Budget / Budget

Responsible for ensuring the position # is vacant, checking to ensure the account and fund #'s are correct & the department has the budget to cover the position

Cabinet Level Approver

Responsible for verifying information is accurate

Final HR Review

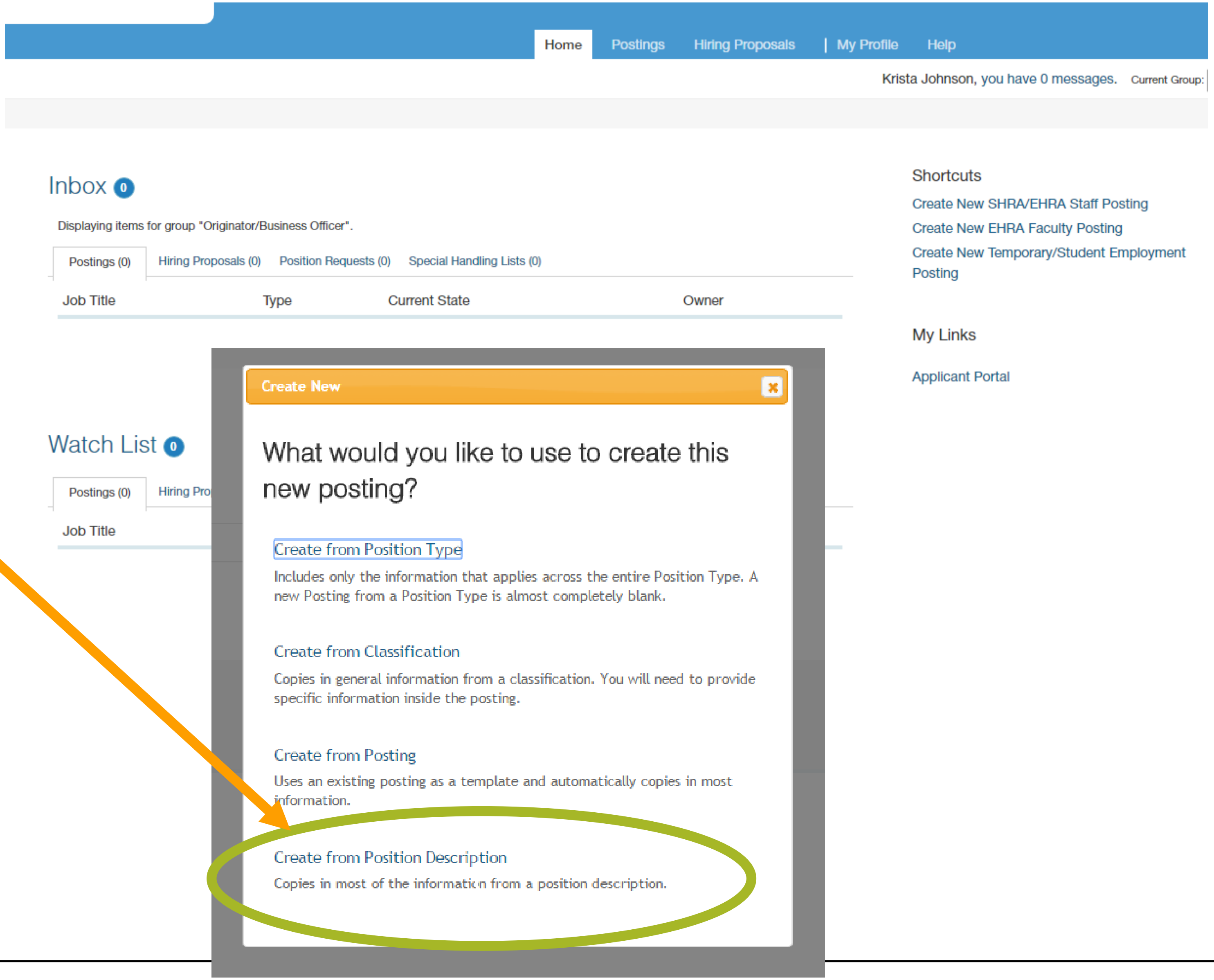
At this point HR is Responsible for Posting the Position

NOTE: Cabinet Level Approver is not the Chancellor's Cabinet Group. This is either the CFO, Provost or Chancellor's Office.

HIRE

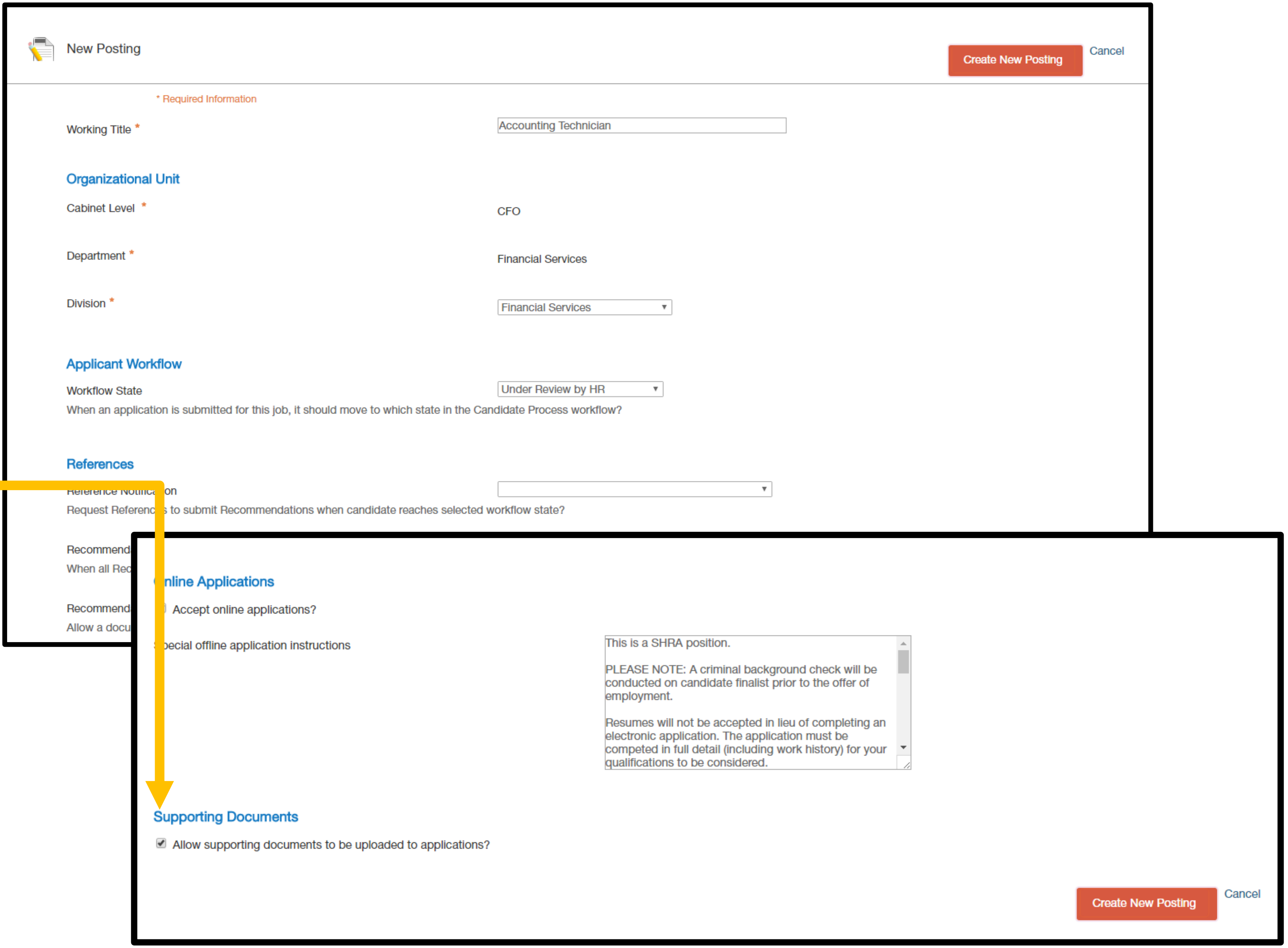
Hover over the module selection drop-down menu and select the **HIRE Module**.

- Create New Posting:
  - Step 1: Create New SHRA/EHRA Staff Posting
    - From the Posting screen, click on the orange "***Create From Position Description***" button. A box will pop up that asks you to "Choose the position request you would like to start." ***Select New Posting***.



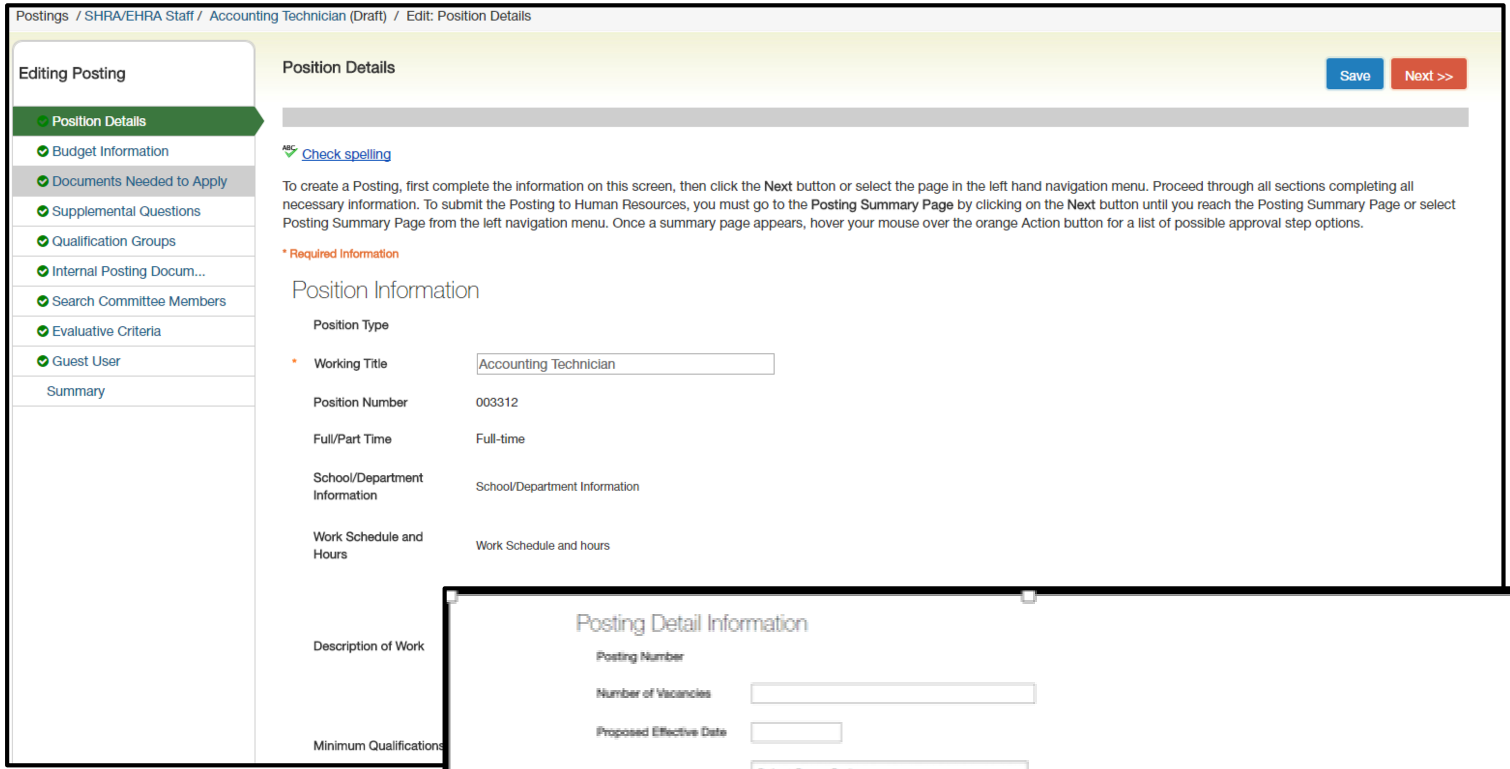
HIRE

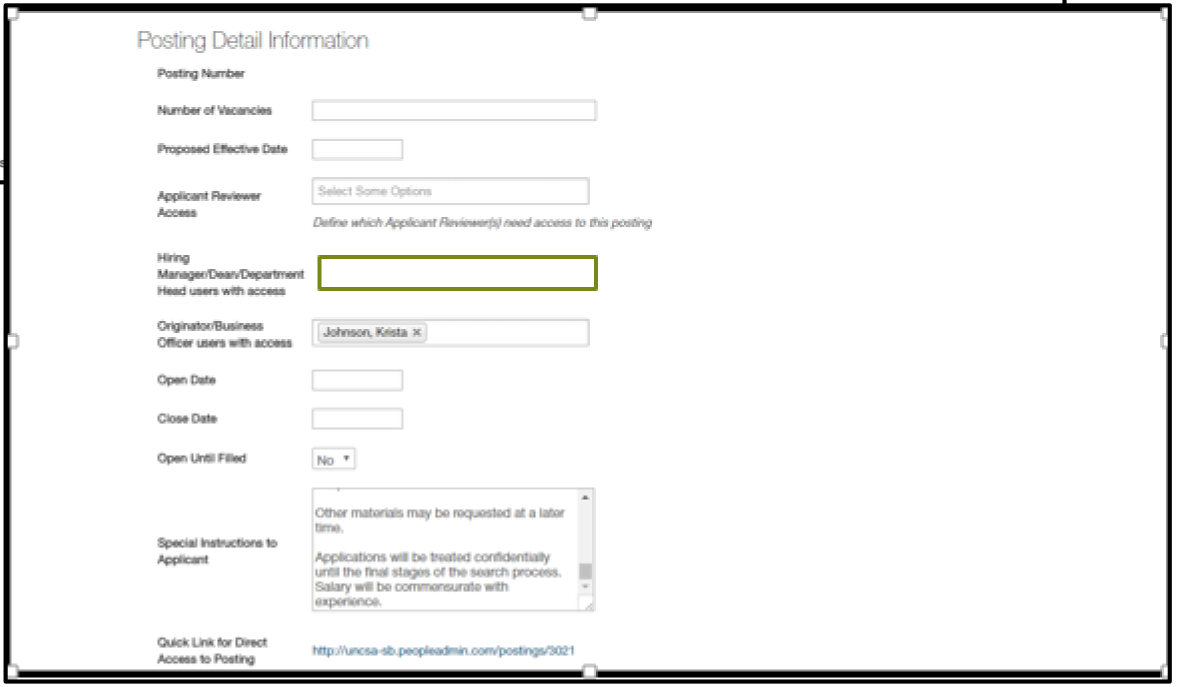
- Create New Posting:
  - Step 2: Enter the proposed Title. If the Department or Division Organizational are not prepopulated please select the Organizational Units for this position.
  - Be sure to click the Supporting Documents box so applicants can attach files to their application.



HIRE

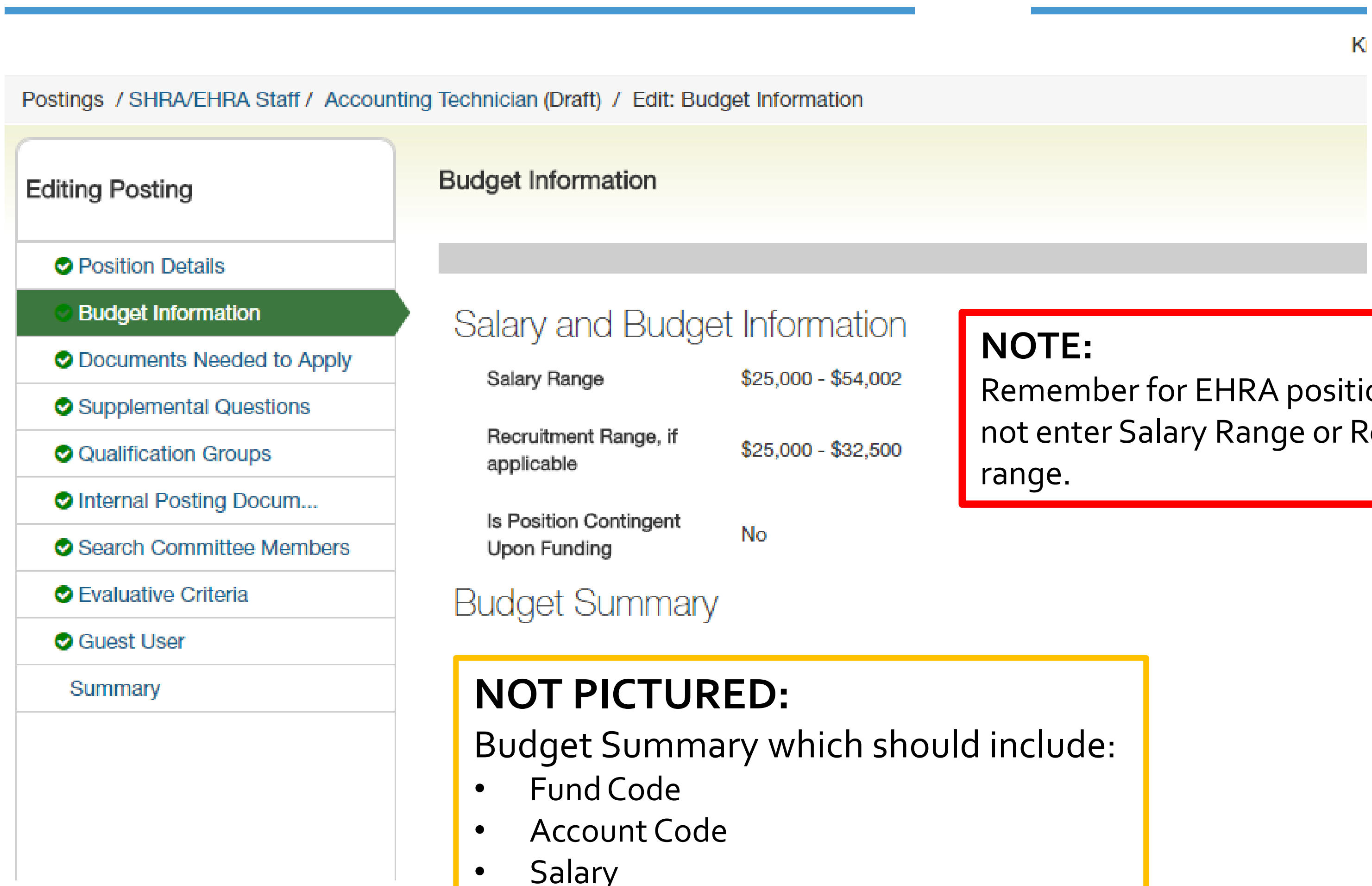
- Create New Posting:
  - Step 3: For Position Details, review to make sure position information is correct, and enter the following:
    - Applicant Reviewer Access
    - Proposed Effective Date (Start Date)
    - Open Date
    - Close Date or Open until Filled (select Yes)
    - Click Save and Continue.





HIRE

- Create New Posting:
  - Step 4: Check Budget Information (*This is tied to the position, so if changes need to be made, please let HR/Budget know before continuing on in the process*).
  - Click Save then hit Next to continue.

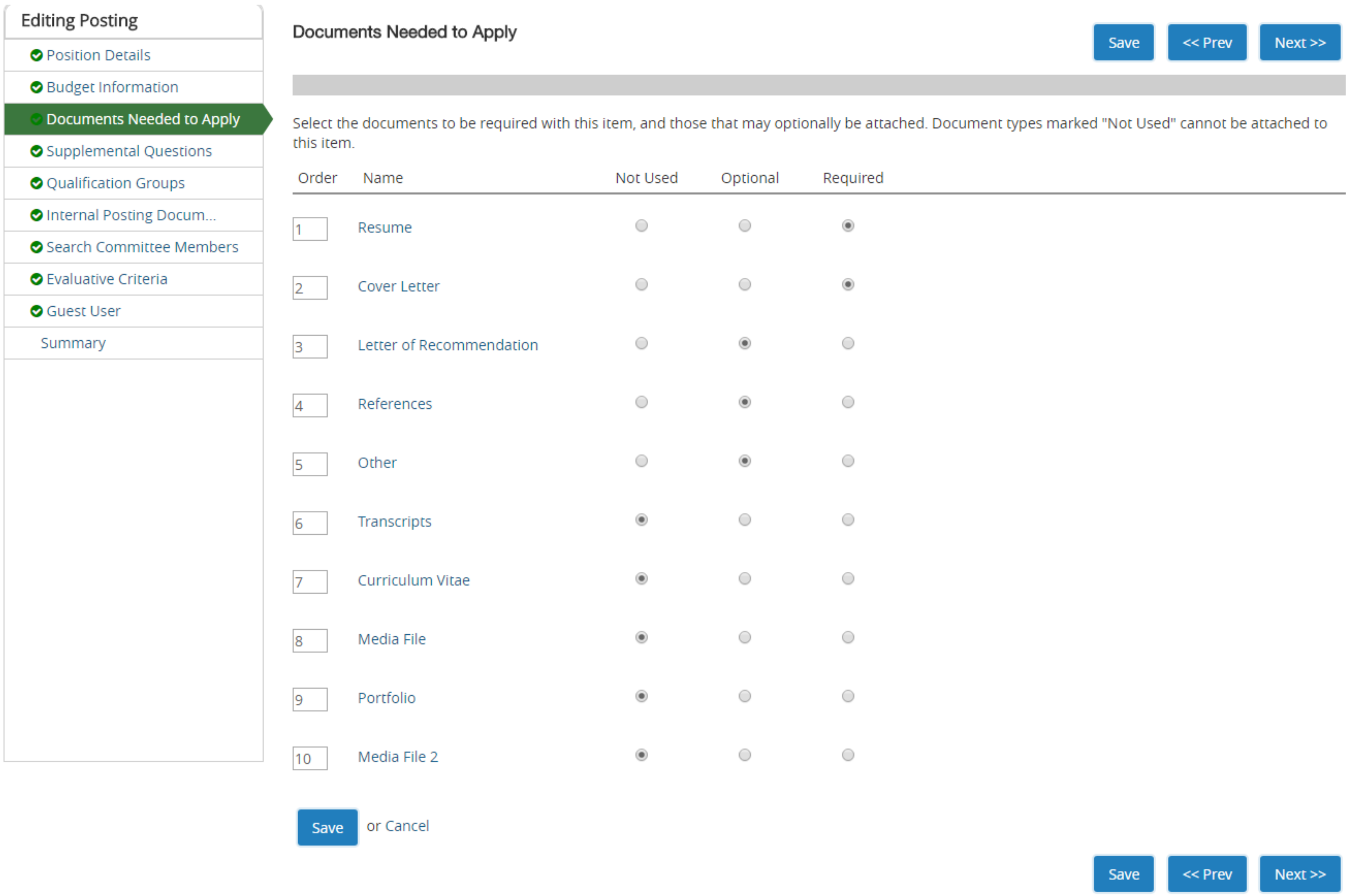


NOTE:
Remember for EHRA positions you will not enter Salary Range or Recruitment range.

NOT PICTURED:
Budget Summary which should include:
- Fund Code
- Account Code
- Salary
- Percentage Funded

HIRE

- Create New Posting:
  - Step 5: Select the Documents that are needed to apply for the position.
    - *You also have the option to make documents optional.*
  - Click Save then hit Next to continue.



HIRE – SUPPLEMENTAL QUESTIONS

Quick points

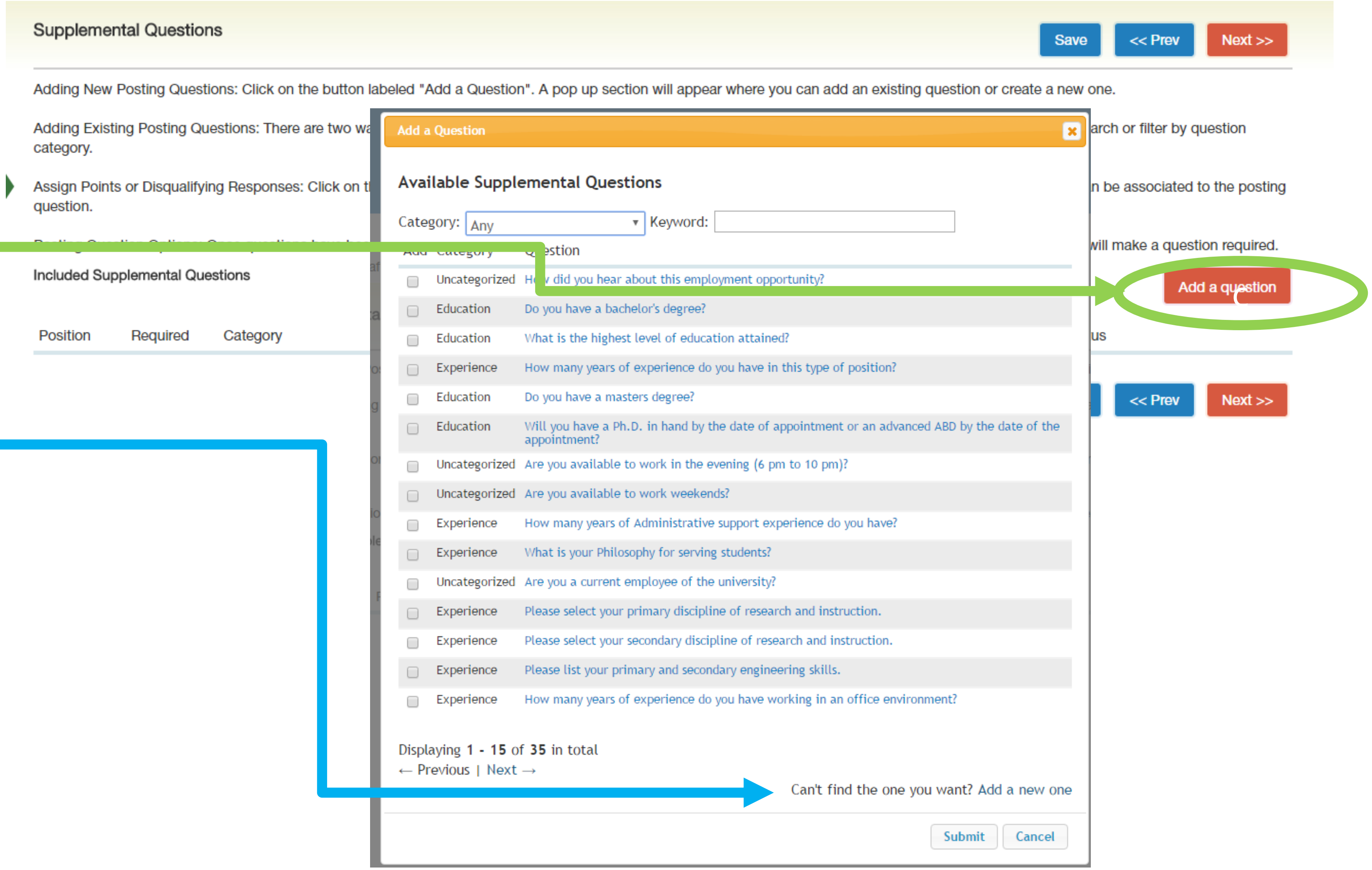
- Supplemental questions can be used to help answer questions about minimum qualifications, preferred qualifications, where the applicant found the listing, etc.

- If you want to have disqualifying criteria for a posting, please use supplemental questions to assist.

- Please note in an effort to keep the number of supplemental questions to a minimum, both the user creating the question and the Campus HR user approving it have a responsibility to search the supplemental questions and make sure a similar one does not already exist. The list of supplemental questions will periodically be reviewed and updated.

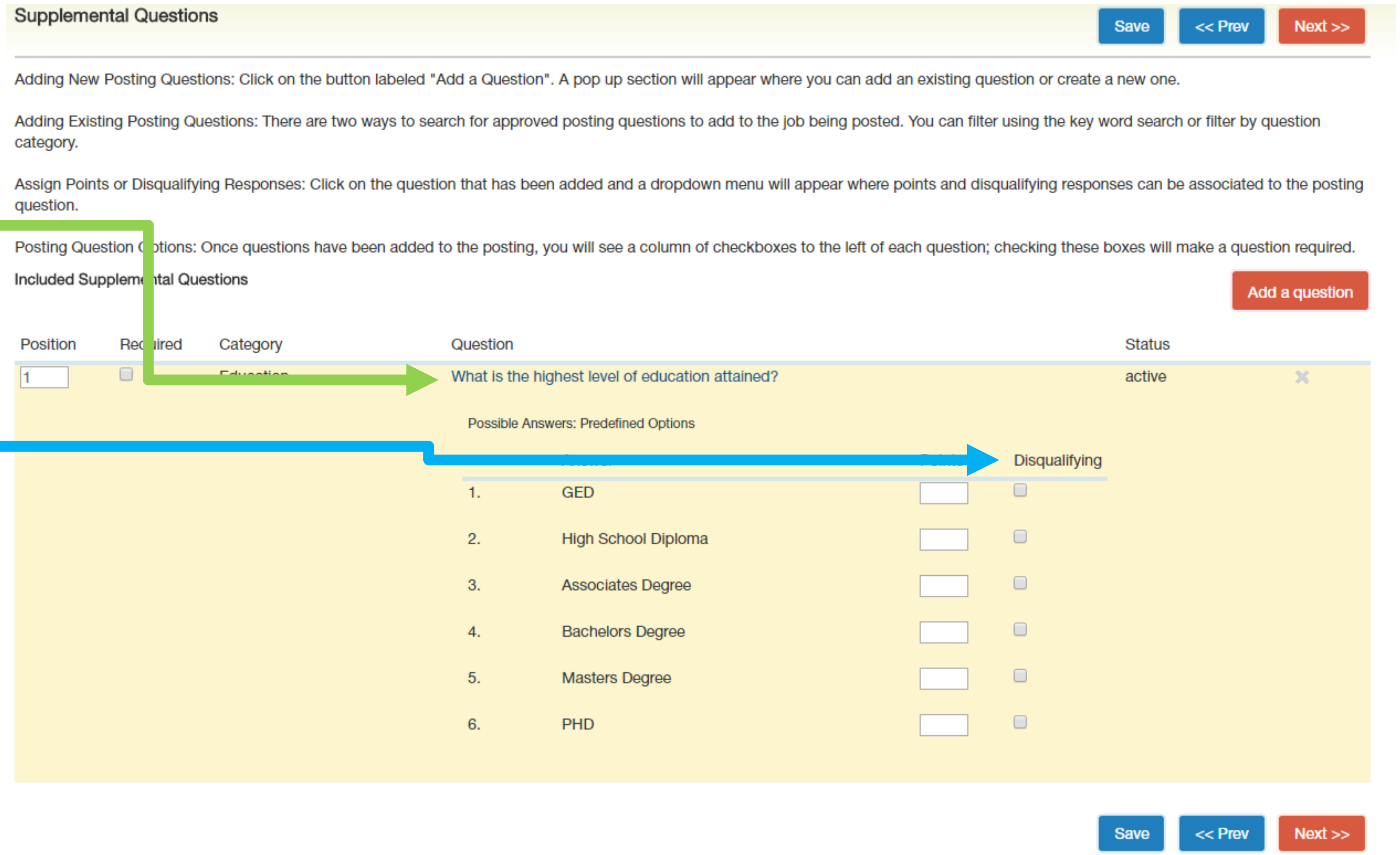
HIRE – supplemental questions

- Create New Posting:
  - Step 6: Select any Supplemental Questions you would like a potential applicant to answer.
    - Click the orange “Add a question” button and select the questions you would like to use, then hit submit.
    - If a question you want to ask is not available, you have the option to create a new one (*This must be approved by HR for it becomes active*).



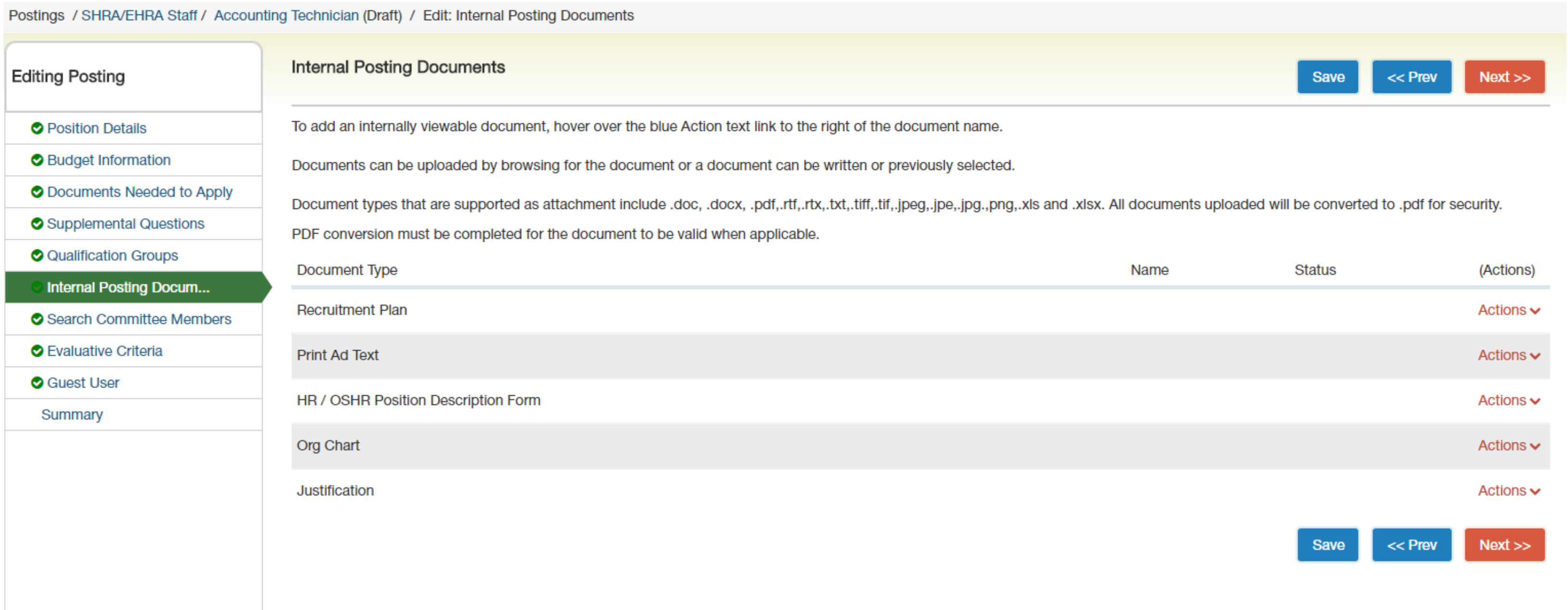
HIRE – supplemental questions

- Create New Posting:
  - Step 6: Supplemental Questions:
  - **Once you add a question to the posting, you can click on the blue question link and specify if you want the answer choice to be disqualifying or assign points for assessment.**
    - Be sure to select the radio button for answers you want to be disqualifying.
    - By making a choice disqualifying, anyone who answers with that choice will immediately be taken out of the pool for the position.
  - Click Save then hit Next to continue.



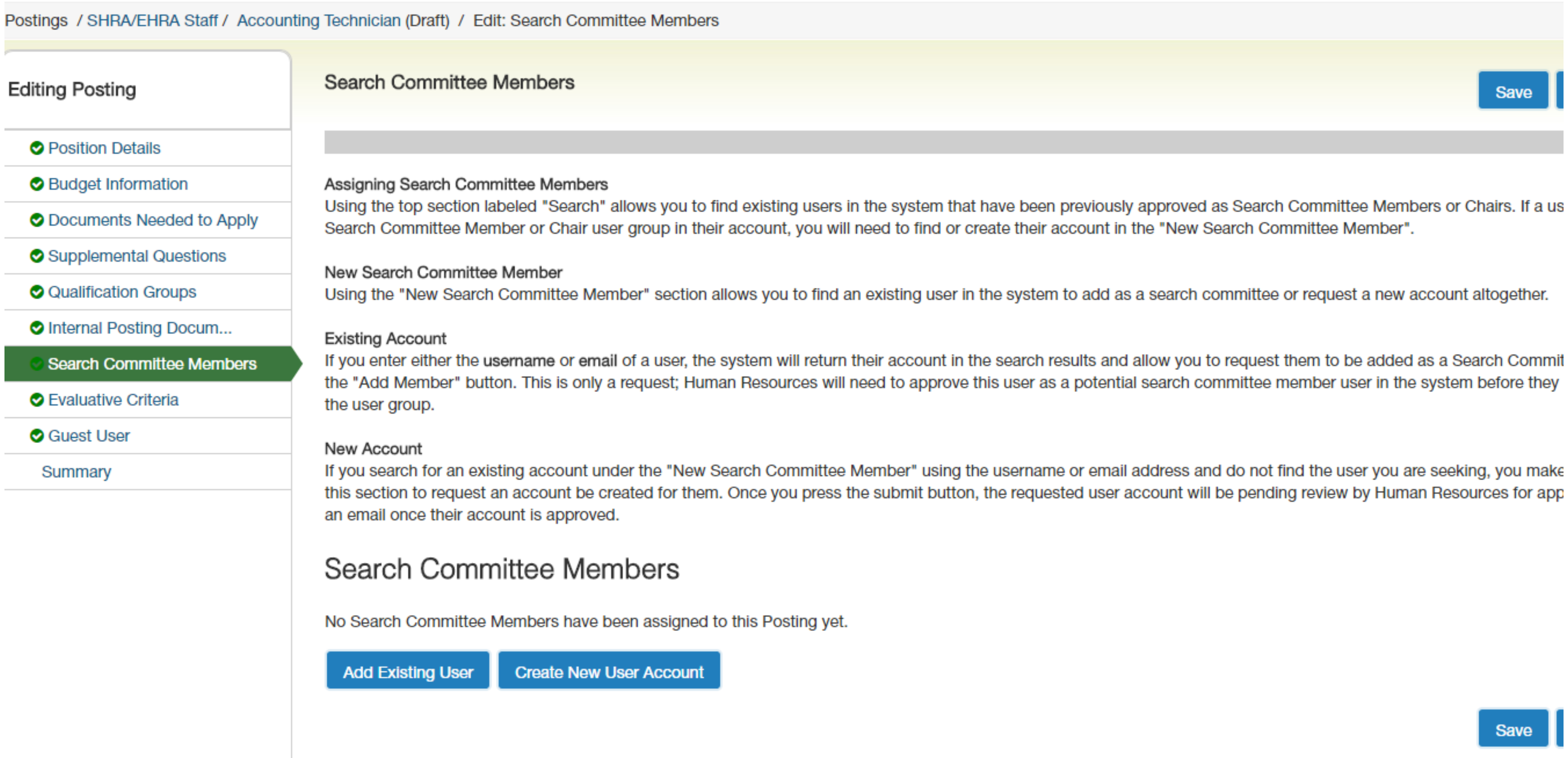
HIRE

- Create New Posting:
  - Step 7: Add the following documents:
  - Recruitment Plan
    - List of where are you advertising outside of UNCSA
  - Print Ad Text
    - The verbiage of Recruitment Ad (can be added to the recruitment plan)
  - HR / OSHR Position Description Form
  - Org Chart
  - Justification.
    - To add documents, go to Actions and you can Upload New, Create New, or choose existing *(By selecting the "choose existing" option it will allow you to choose any previously upload documents)*
  - Click Save then hit Next to continue.



HIRE

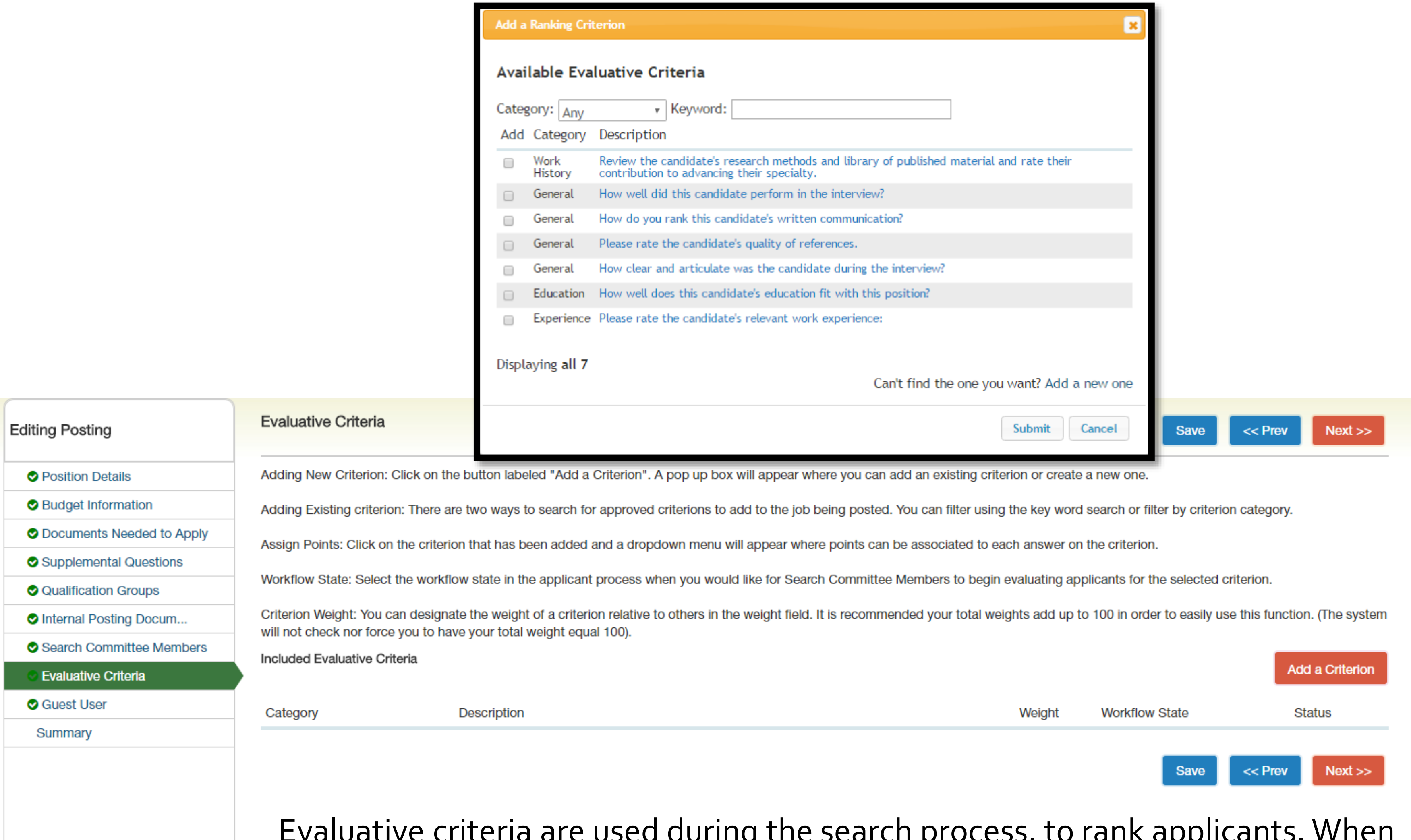
- Create New Posting:
  - Step 8: Enter Search Committee Members.
    - Click "Add Existing Users" to add those already in the PA System
    - Click "Create New User Account" for someone who needs access to view applicants and is not currently in the system *(If you create a new user, HR will have to approve the member).*
    - Click Save then hit Next to continue.



Note: All UNCSA employees already have an account and access to be a Search Committee Member.

HIRE

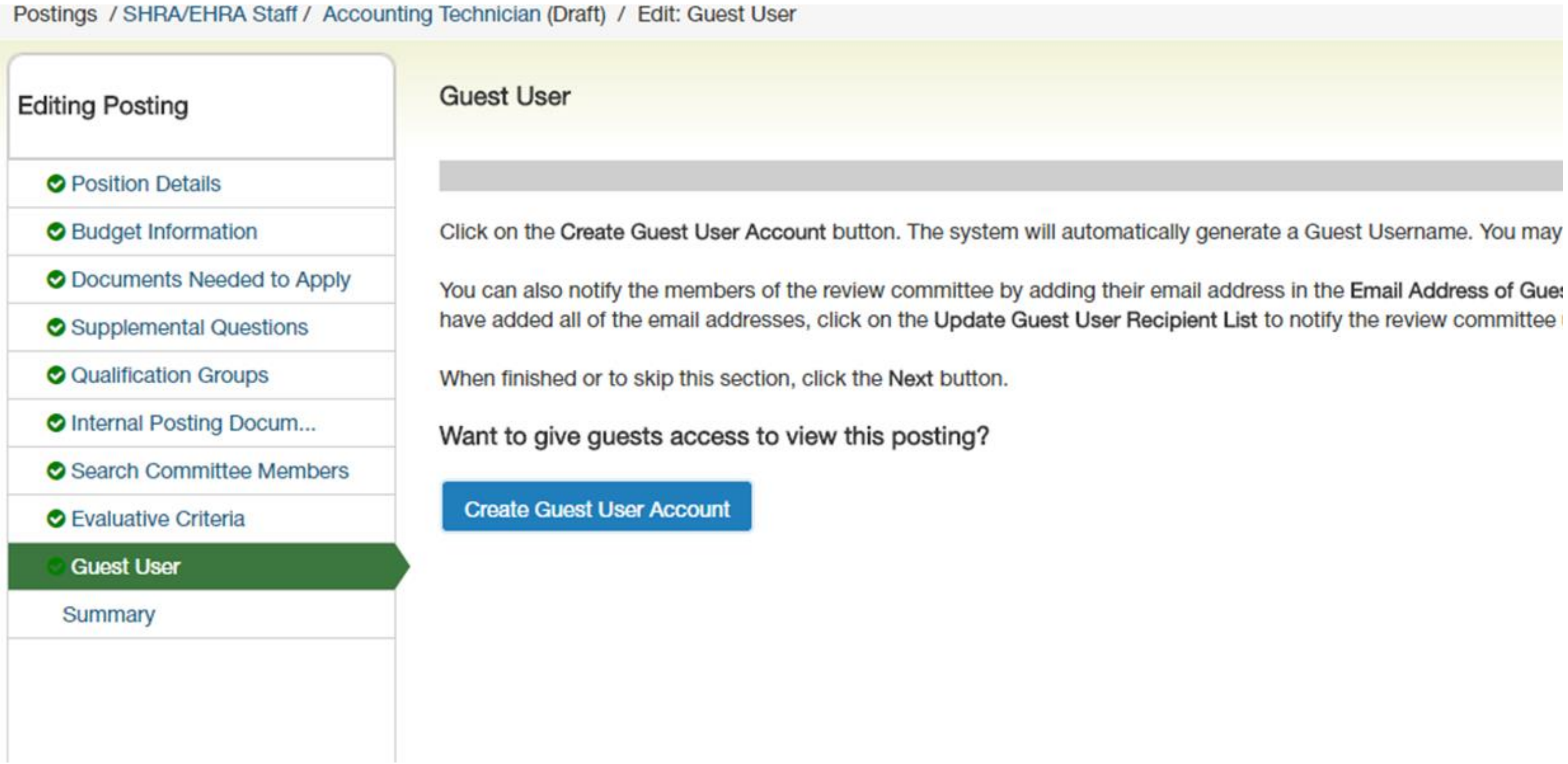
- Create New Posting:
  - Step 9: Enter the Evaluative Criteria.
    - Click the orange "Add a Criterion" button and select the questions you would like to use, then hit submit.
    - If a Criterion you want to answer is not available you have the option to create a new one *(This must be approved by HR for it to be active).*
    - Click Save then hit Next to continue.



Evaluative criteria are used during the search process, to rank applicants. When adding evaluative criteria, you will have the opportunity to choose an Applicant workflow State. This is important to note because selecting the state at which the criteria will be available, denotes when the committee members can evaluate the candidate in the search process.

HIRE

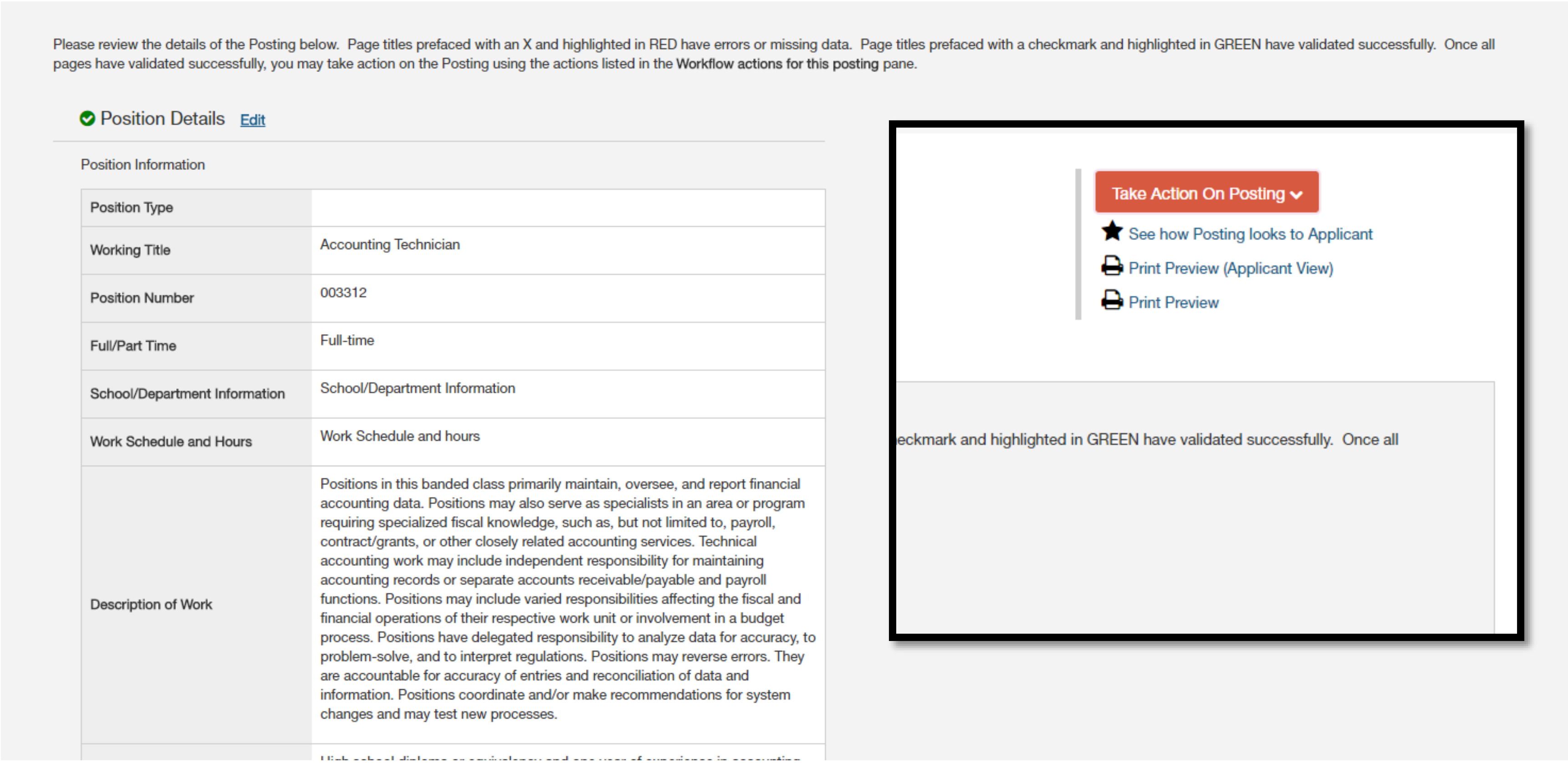
- Create New Posting:
  - Step 10: Guest User Access - This account is shared by all the guests who need to see the posting.
    - If you create a guest user account: this will create a generic username and password.
    - Enter a valid email address for each person who will use this account. Enter only one email address on each line.
    - Guest users will receive a system email with the guest user login credentials
    - Click Save then hit Next to continue.



Note: All UNCSA employees already have an account and access to be a Search Committee Member.

HIRE

- Create New Posting:
  - Step 11: Review Summary Page
    - You can view how the posting will look to the applicants and see a print preview of the applicant view of the posting.
    - Once you have completed the review, click on the orange “Take Action on Posting” to submit to the Hiring Manager / Dean / Department Head.



ANY QUESTIONS?

HOW TO POST A FACULTY POSITION

You need to be located in the HIRE module

Routing Process

Originator / Business Officer

Responsible for originating the process and filling out all necessary fields for the Posting / Hiring Proposal

Hiring Manager / Dean / Department Head

Responsible for verifying the information being routed is accurate

Initial HR Review

Responsible for verifying the information presented has no conflicts with HR policy and procedures

Summer Intensive Budget / Budget

Responsible for ensuring the position # is vacant, checking to ensure the account and fund #'s are correct & the department has the budget to cover the position

Faculty Affairs

Responsible for verifying Faculty language and information is accurate and consistent

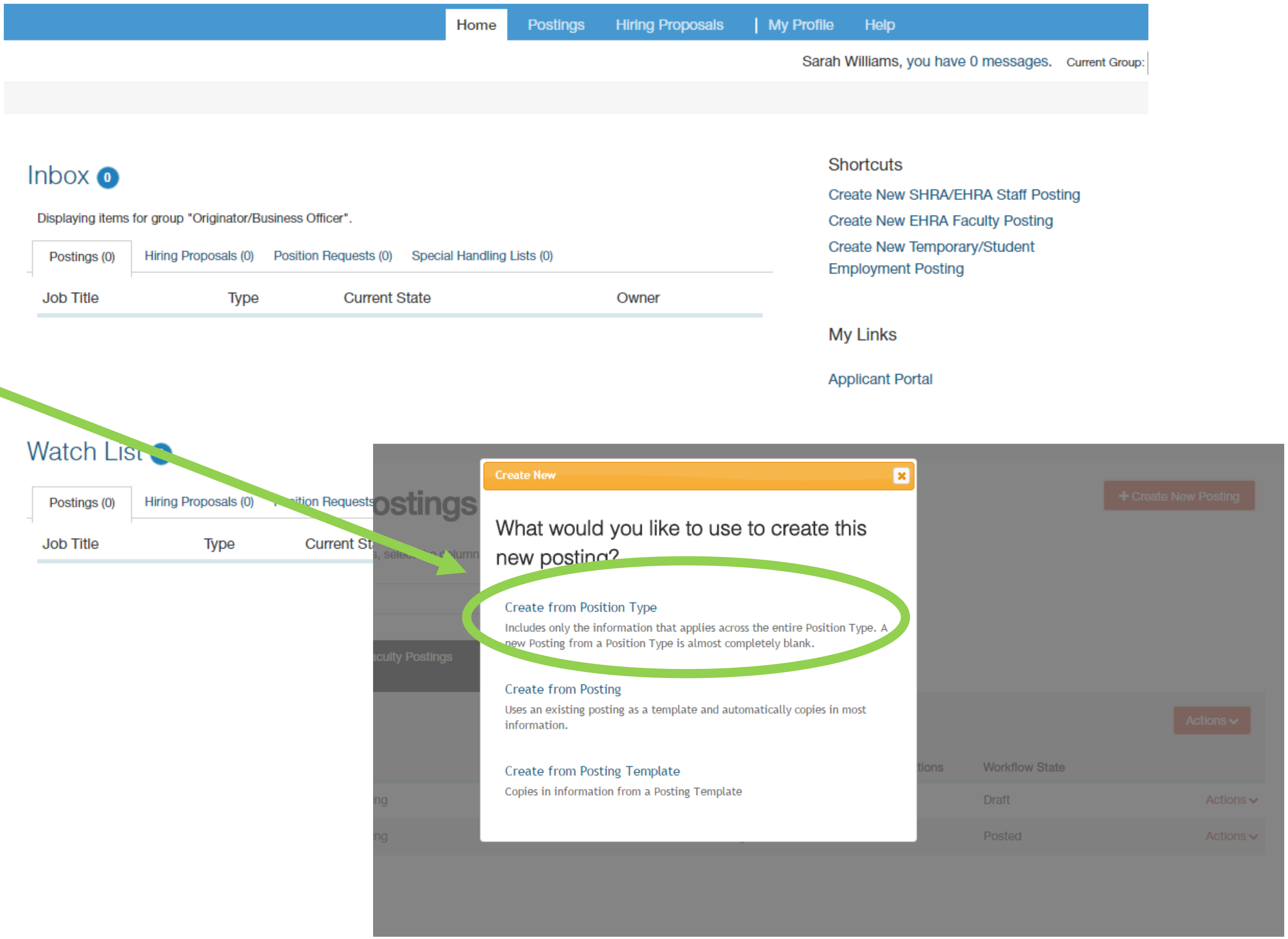
Final HR Review

At this point HR is Responsible for Posting the Position / or Approving the Hiring Proposal

HIRE

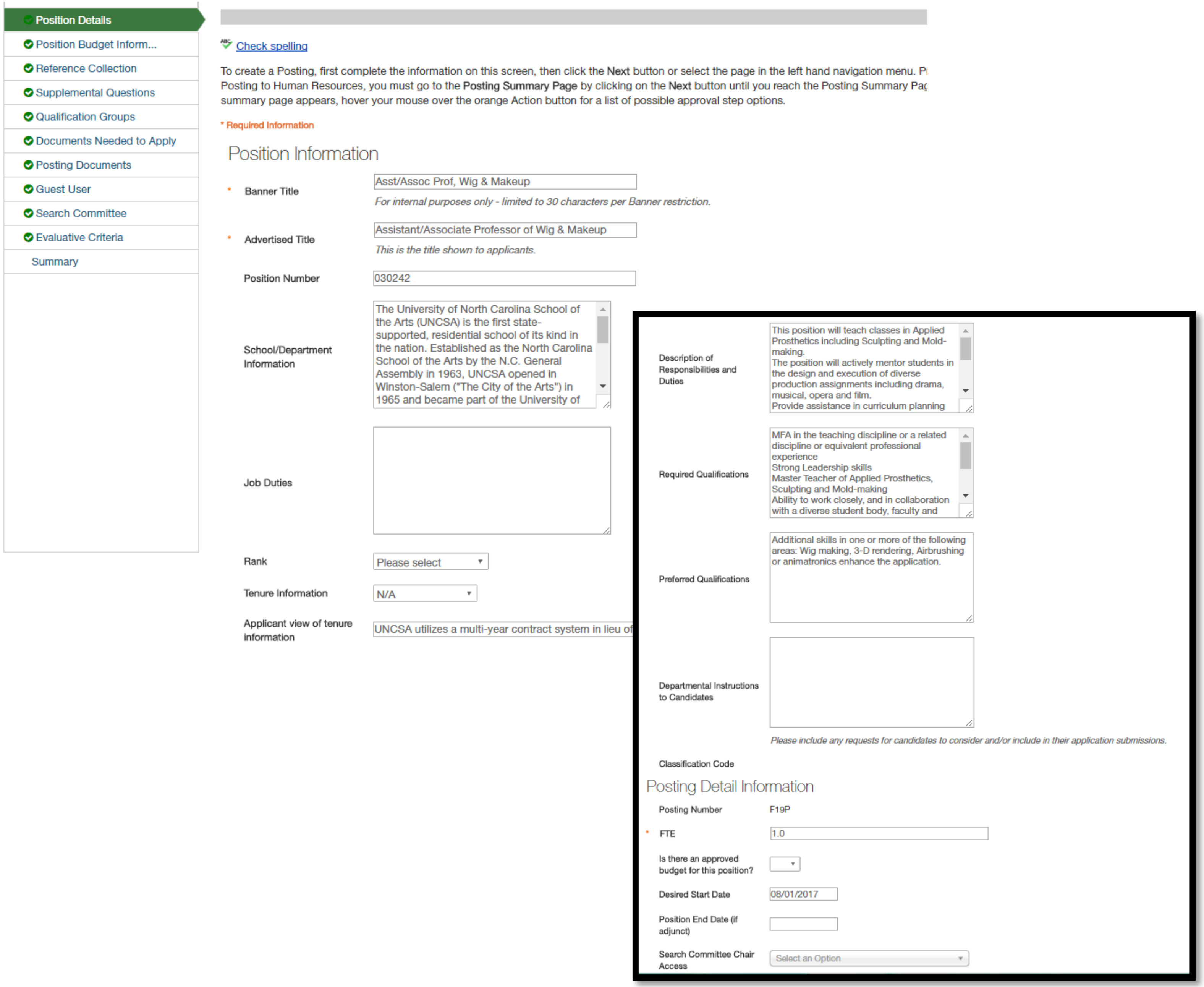
Hover over the Postings Tab and click EHRA Faculty.

- Step 1: Create New EHRA Faculty Posting
- Step 2: Select to Create from Position Type
- Step 3: Enter the Position Title, Cabinet Level (Provost), Department, and Division information
    - *Under Supporting Documents* – be sure to check the box to allow for supporting documents to be uploaded to the application.



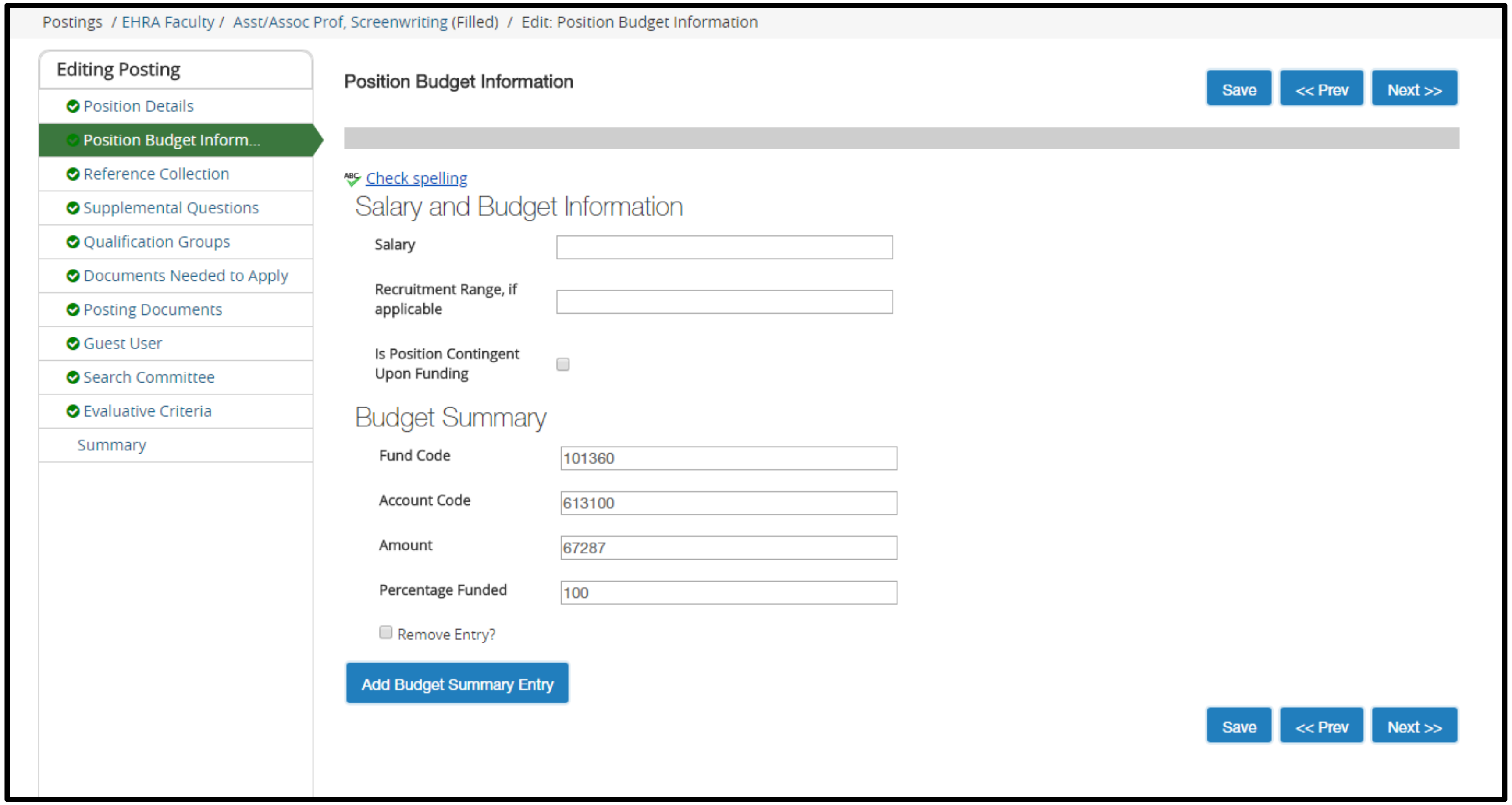
HIRE

- Step 4: Enter the Position Details
  - Title
  - Position #
  - School/Dept Info
  - Rank
  - Tenure Information
  - Description of Responsibilities and Duties
  - Required Quals
  - Preferred Quals
  - FTE
  - Desired Start Date
  - Position End Date*
  - Originator/Business Officer
  - Dean
  - Open Date
  - End Date or Open Until Filled
  - & Advertising Sources
  - PLEASE NOTE:
    - *Rank – you can leave blank unless you are definite of the type you are recruiting for.*
    - *Tenure Information – N/A*
    - *Applicant View of tenure:*
      - *"UNCSA utilizes a multi-year contract system in lieu of tenure."*



HIRE

- Step 5: Enter Position Budget
  - Under Budget Summary
    - Fund Code
    - Account Code
    - Amount
    - Percentage Funded

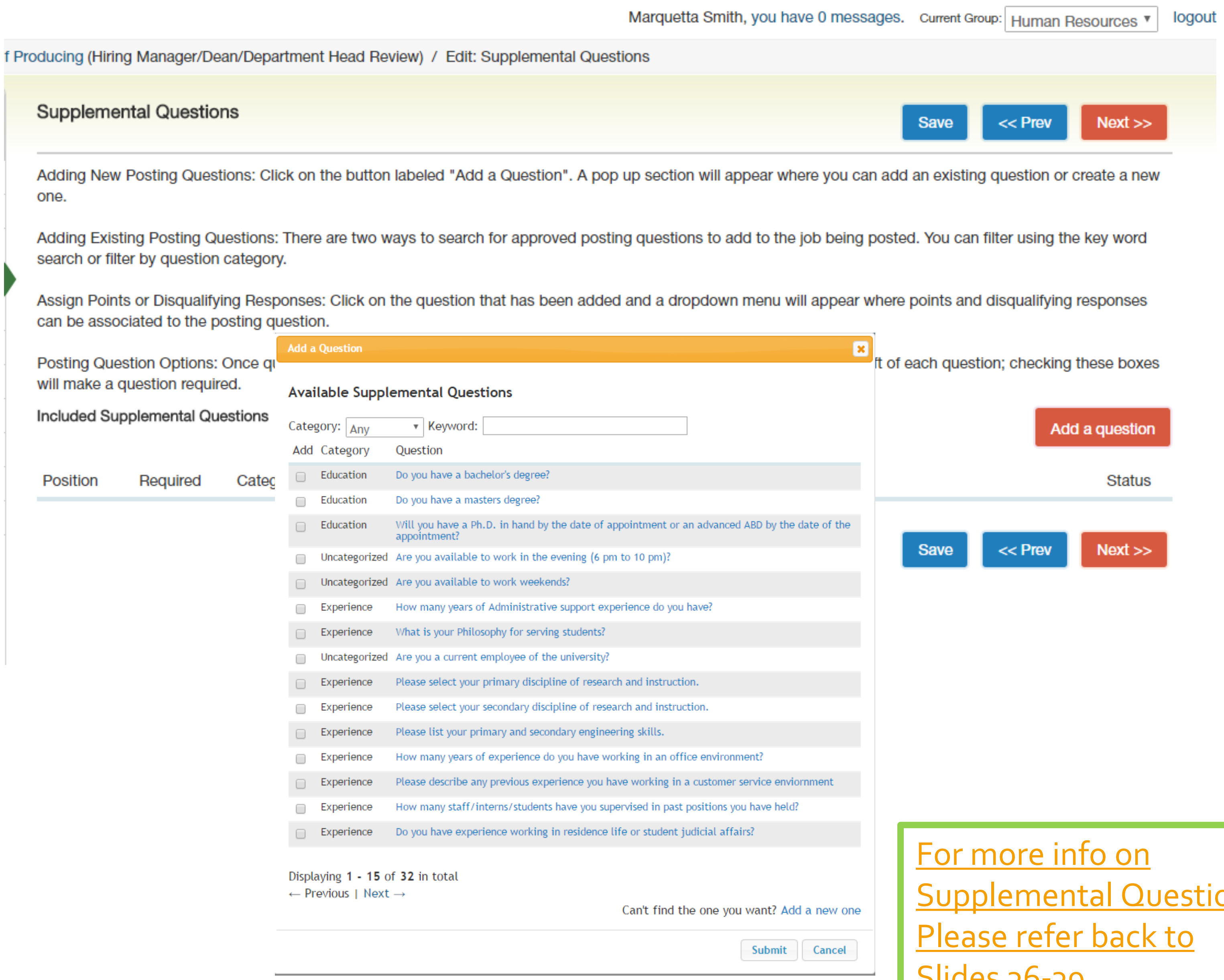


HIRE

- Step 6: *Skip over Reference Collection* and go to **Supplemental Questions**

  (only needed if you plan to ask supplemental questions; if not please skip to the following step

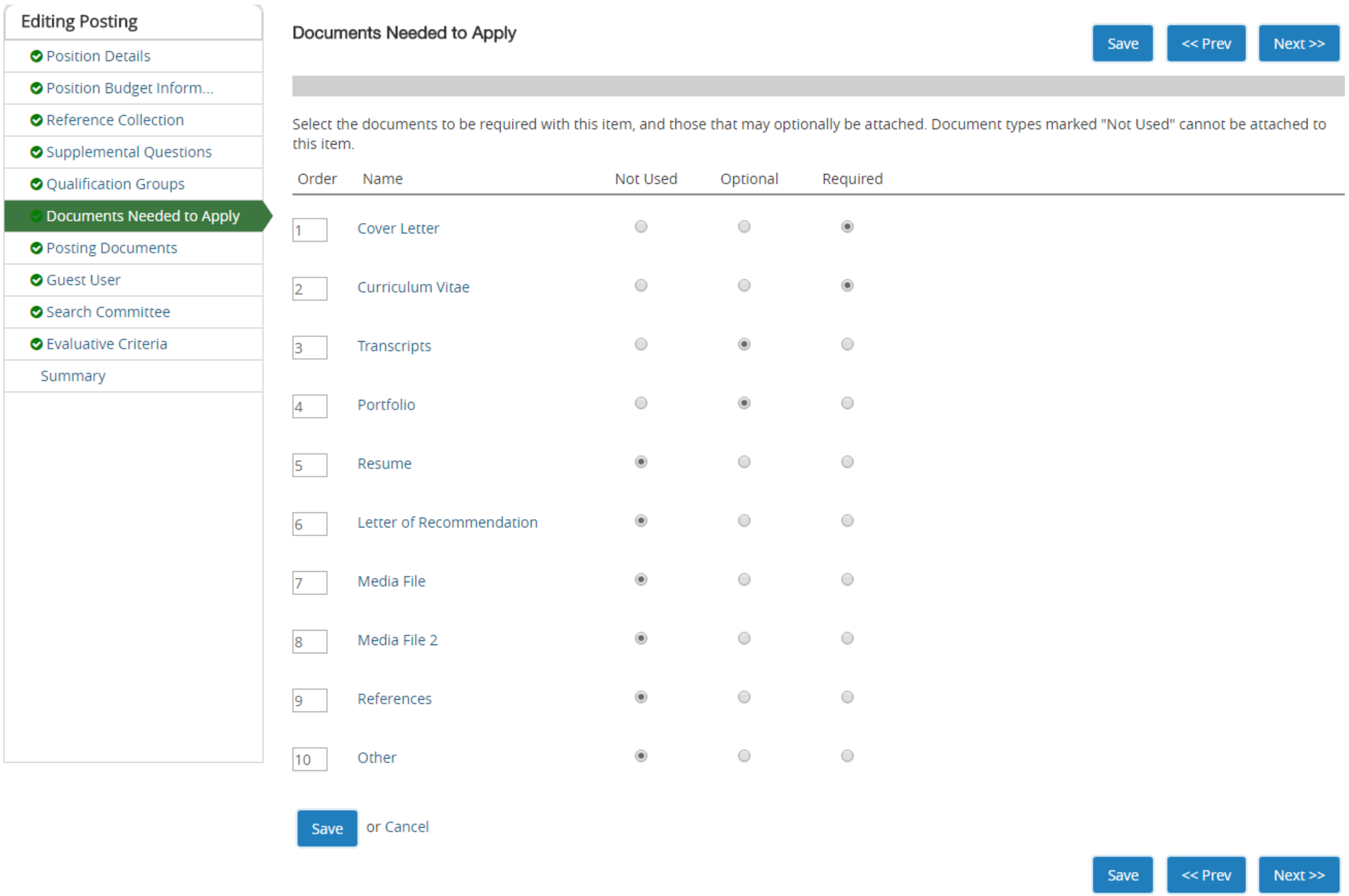
  - Click on the orange "*Add a question*" button and go through and select questions you would like to ask
    - You can organize the order once you have selected all of the questions
    - You can select which questions will be required
    - If there is a question that does not exist, you can add a new one, but HR will have to approve it before it becomes available



For more info on Supplemental Questions: Please refer back to Slides 36-39

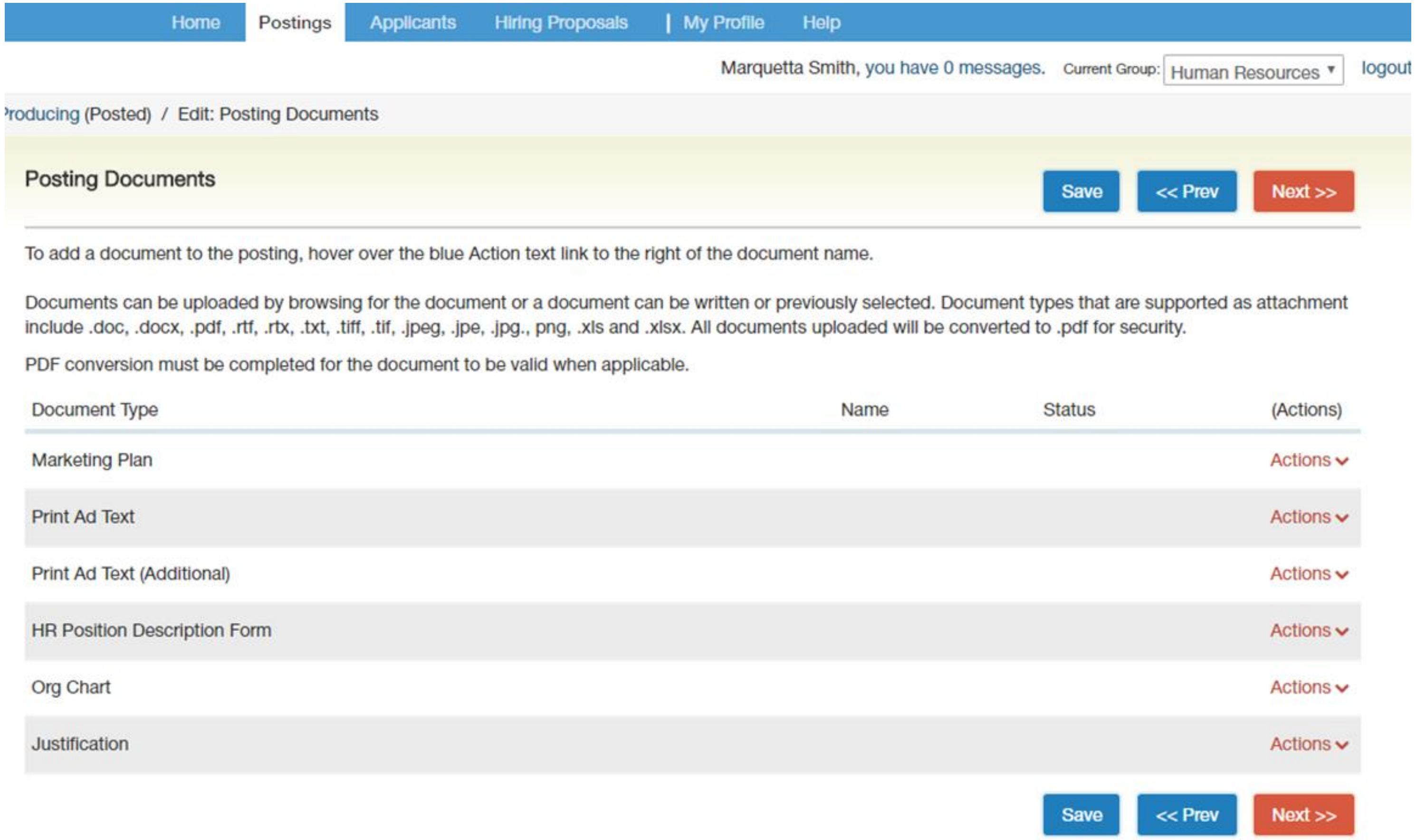
HIRE

- Step 7: *Skip over Qualification Groups and* go to **Documents Needed to Apply**
  - Select the necessary documents a candidate must submit to apply for the posting (you may have optional documents as well)
    - *Helpful Hints*:
      - **Required Documents**
        - Cover Letter,
        - CV
      - **Optional Documents**
        - Media File
        - Portfolio
        - Media File
        - Transcripts



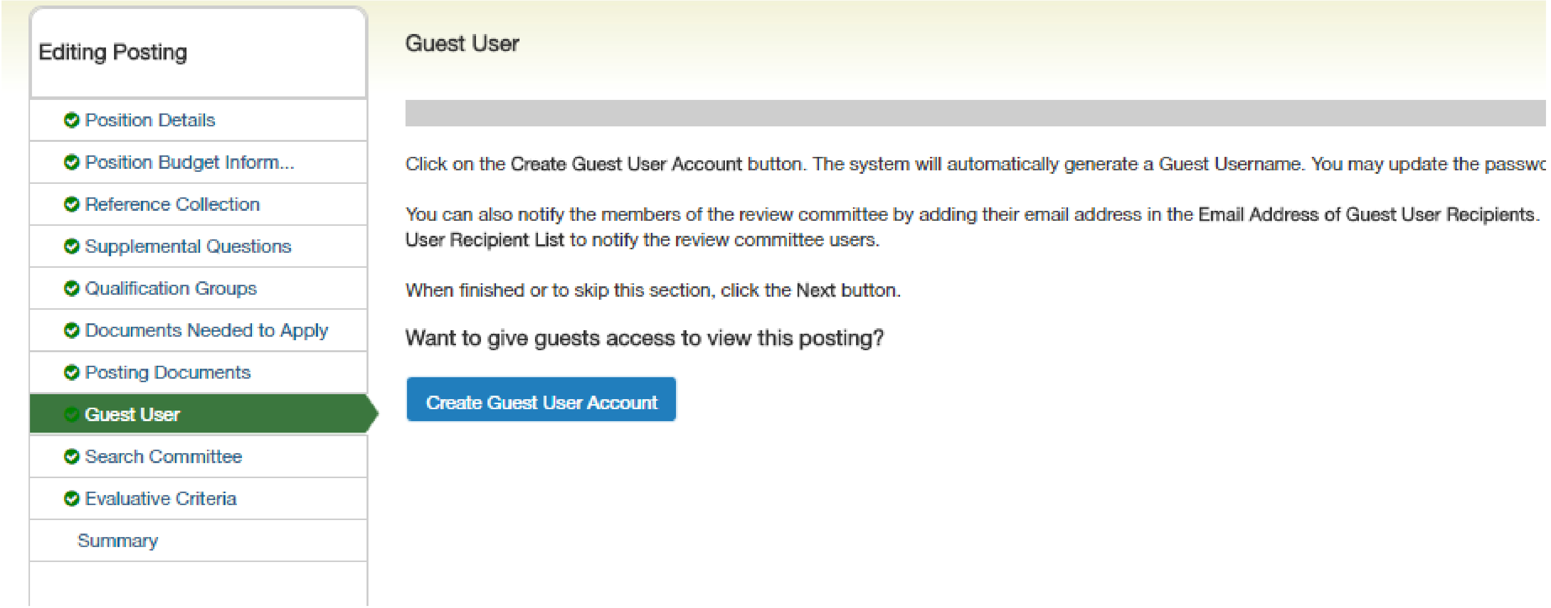
HIRE

- Step 8: Posting Documents
  - Please submit the following:
    - Marketing Plan
      - List of where are you advertising outside of UNCSA
    - Print Ad Text – Verbiage of Recruitment Ad *(can be added to the Marketing Plan)*
    - Justification
    - Org Chart



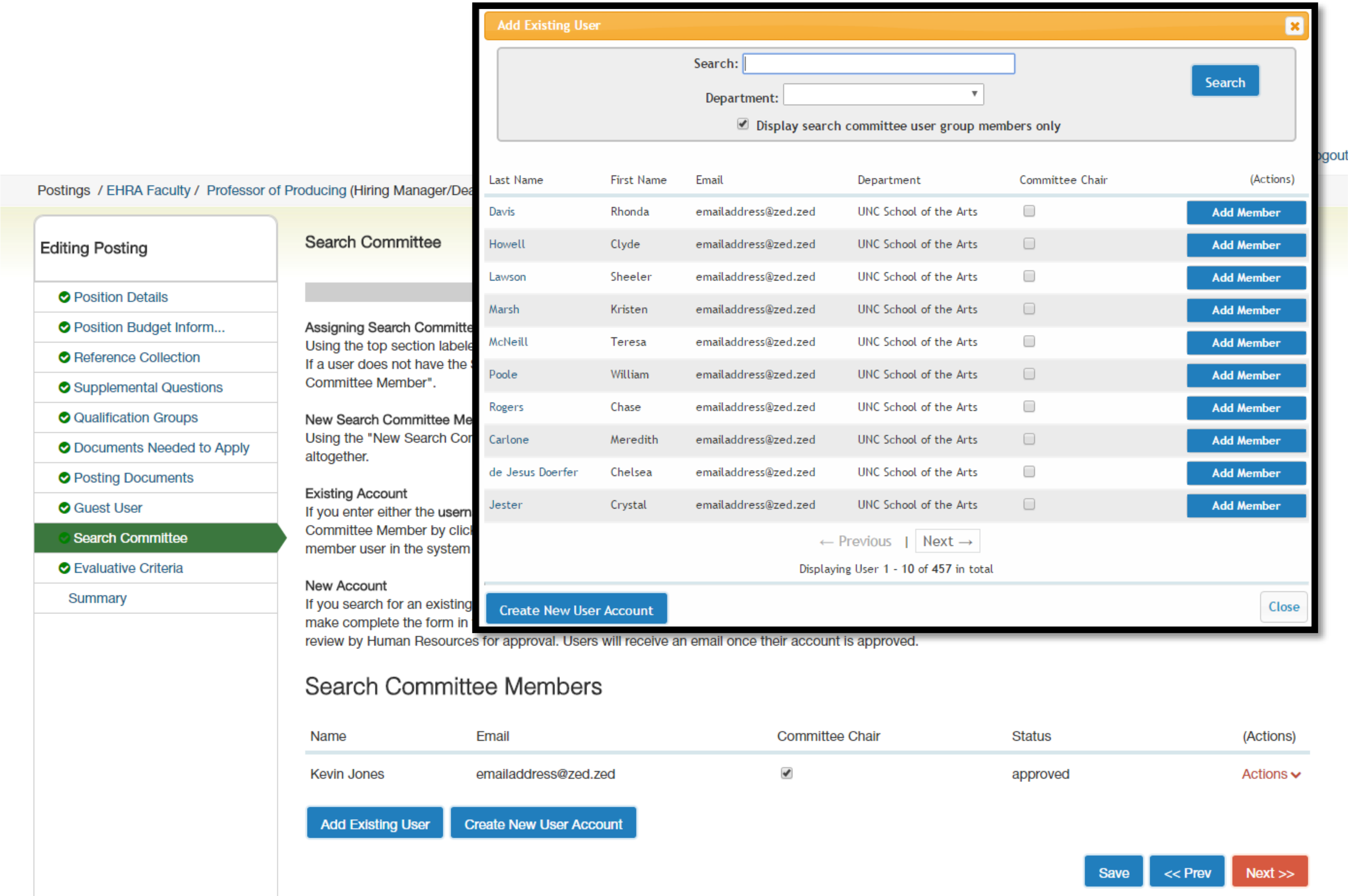
HIRE

- Create New Posting:
  - Step 9: Guest User Access - This account is shared by all the guests who need to see the posting.
    - If you create a guest user account: this will create a generic username and password.
    - Enter a valid email address for each person who will use this account. Enter only one email address per line.
    - Guest users will receive a system email with the guest user login credentials
    - Click Save then hit Next to continue.



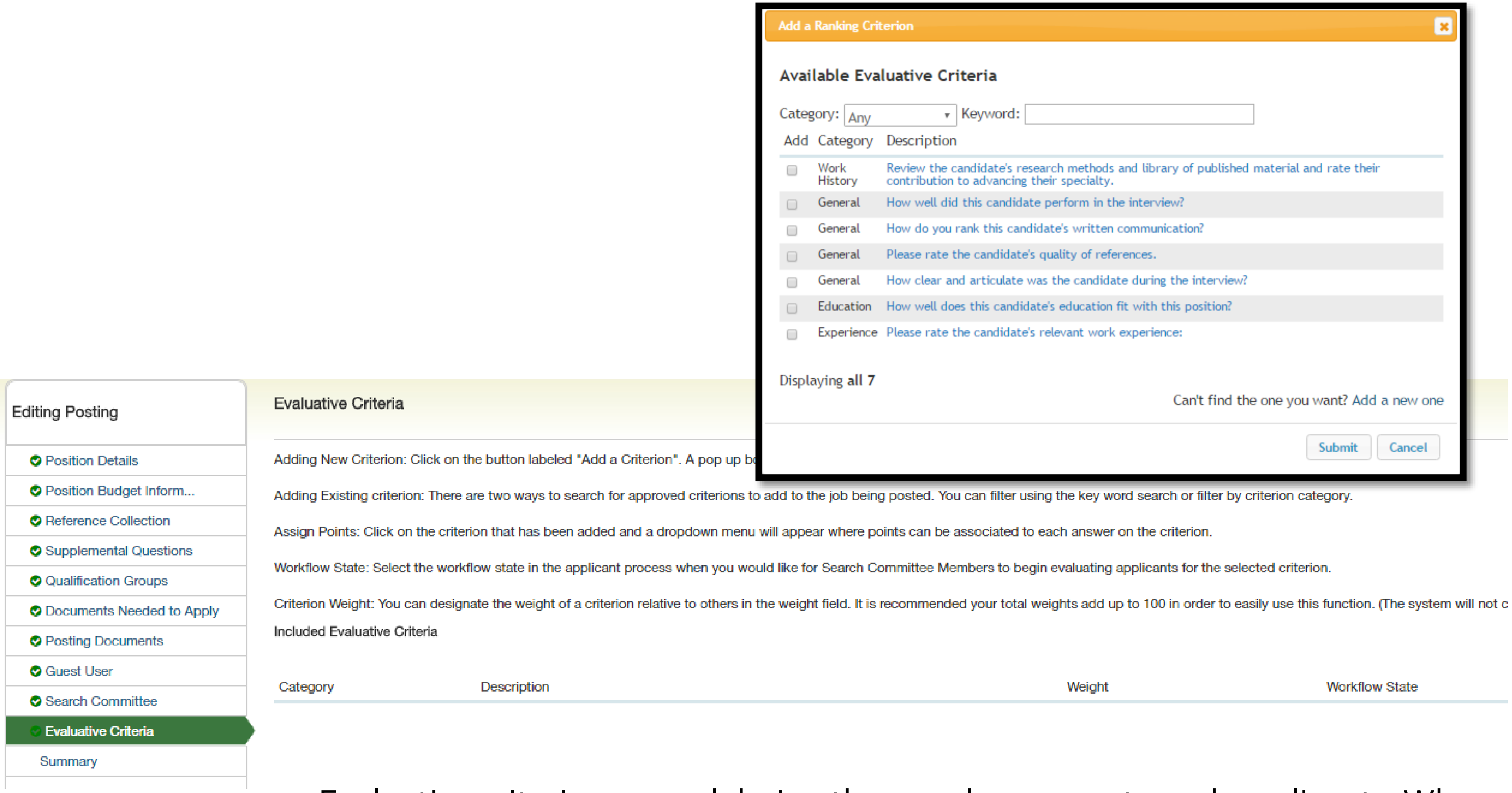
HIRE

- Step 10: Enter Search Committee Members
  - Click on blue “Add Existing User” to add members
  - You can filter through or search for members
  - If a UNCSA employee does not exist please contact HR, so we can add them to the system.
  - Non-UNCSA employee can either get Guest User information or you can create a new user account for them to be added.
  - Guest User Access
    - If you create a guest user account: this will create a generic user name and password that you can give guests to have view only access to the posting. You can enter in email address and an email will be sent out to those users.
    - Click Save then hit Next to continue.



HIRE

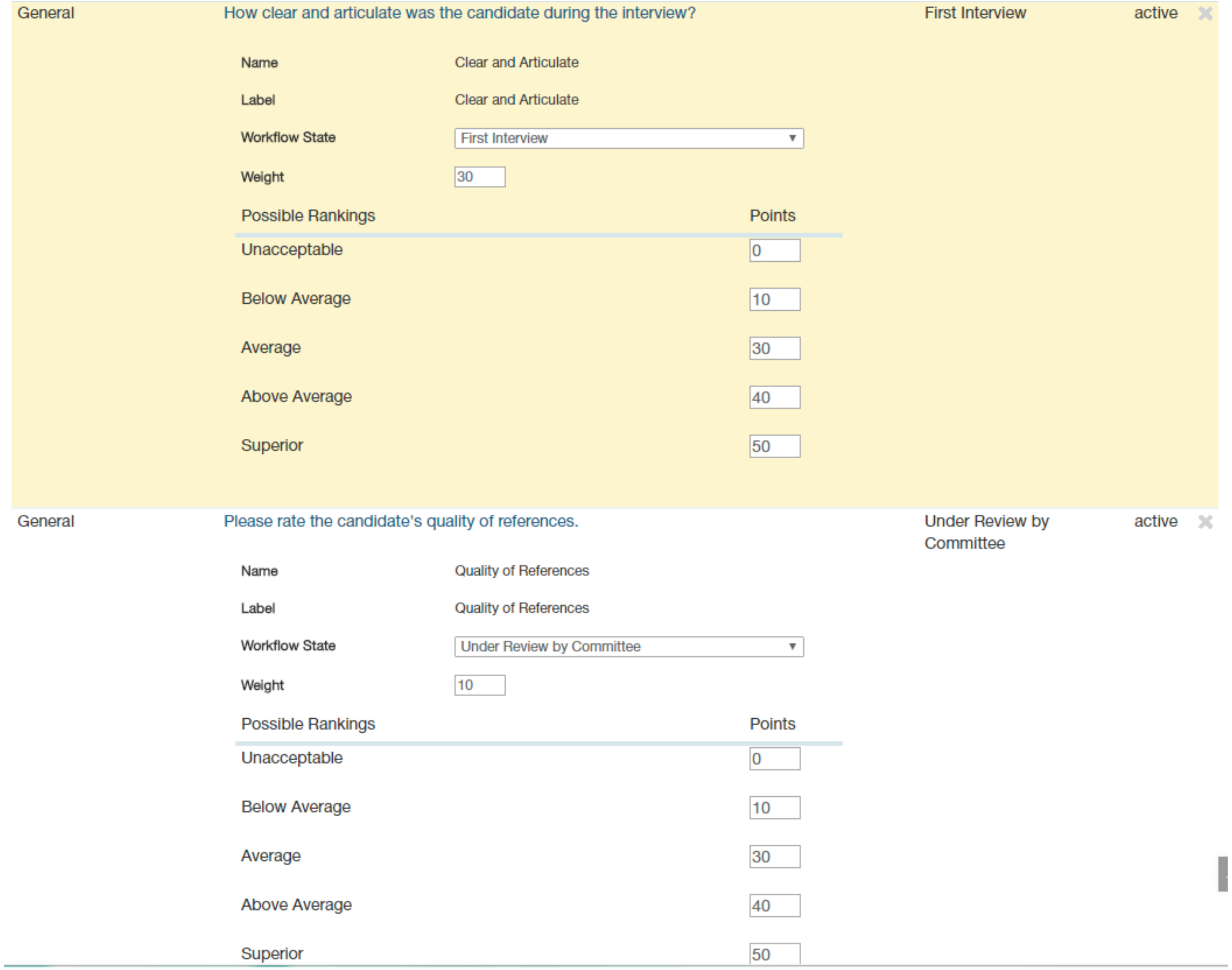
- Create New Posting:
  - Step 11: Enter the Evaluative Criteria.
    - Click the orange “Add a Criterion” button and select the questions you would like to use, then hit submit.
    - If a Criterion you want to answer is not available, you have the option to create a new one *(This must be approved by HR for it to be active).*
    - Click Save then hit Next to continue.



Evaluative criteria are used during the search process, to rank applicants. When adding evaluative criteria, you will have the opportunity to choose an Applicant workflow State. This is important to note because selecting the state at which the criteria will be available, denotes when the committee members can evaluate the candidate in the search process.

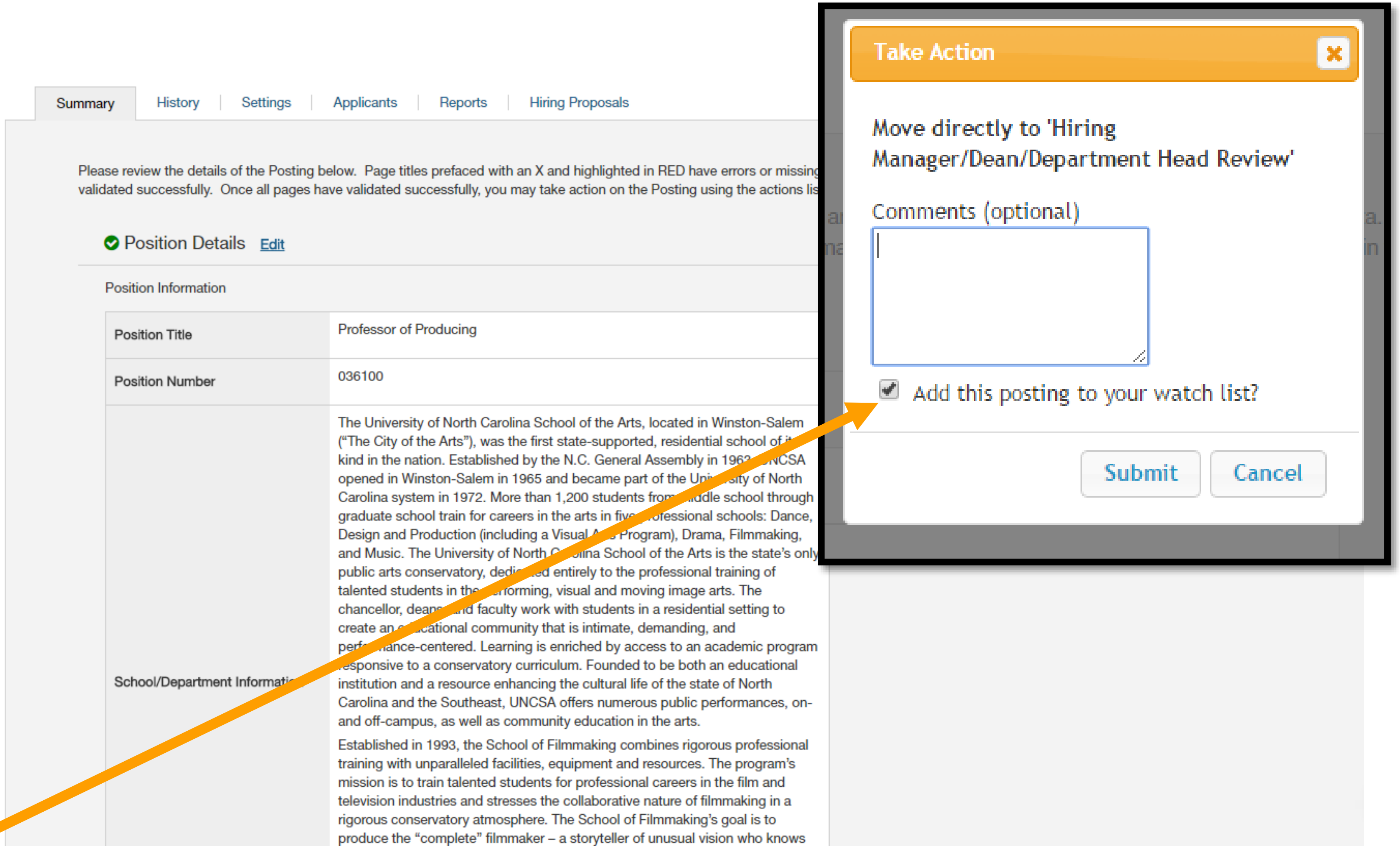
HIRE

- Step 11: Enter Evaluative Criteria *(only needed if Search Committee would like to incorporate; if not please skip to review information tab.*

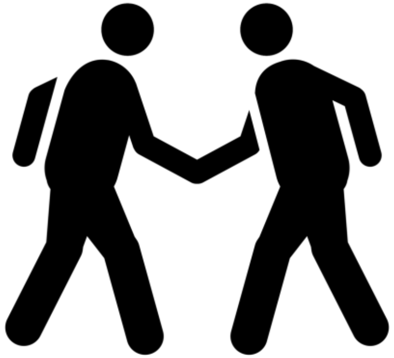


HIRE

- Step 12: Review Summary of Position
  - *Then submit to the Hiring Manager, Dean, or Department Head for approval by clicking on the orange "Take Action on Posting" button.*
  - *A take Action box will appear for you to submit to the HM/Dean/DH*
    - *You can write a message (optional) – this message will also appear in the email generated from the PA System*
    - *If you do not wish to add this posting to your watch list, please uncheck the button*
    - *Click submit to send to the posting forward.*



ANY QUESTIONS?



HOW TO POST A TEMPORARY POSITION

You need to be located in the HIRE module

Routing Process

Originator / Business Officer

Responsible for originating the process and filling out all necessary fields for the Posting / Hiring Proposal

Hiring Manager / Dean / Department Head

Responsible for verifying the information being routed is accurate

Initial HR Review

Responsible for verifying the information presented has no conflicts with HR policy and procedures

Summer Intensive Budget / Budget

Responsible for ensuring the position # is vacant, checking to ensure the account and fund #'s are correct & the department has the budget to cover the position

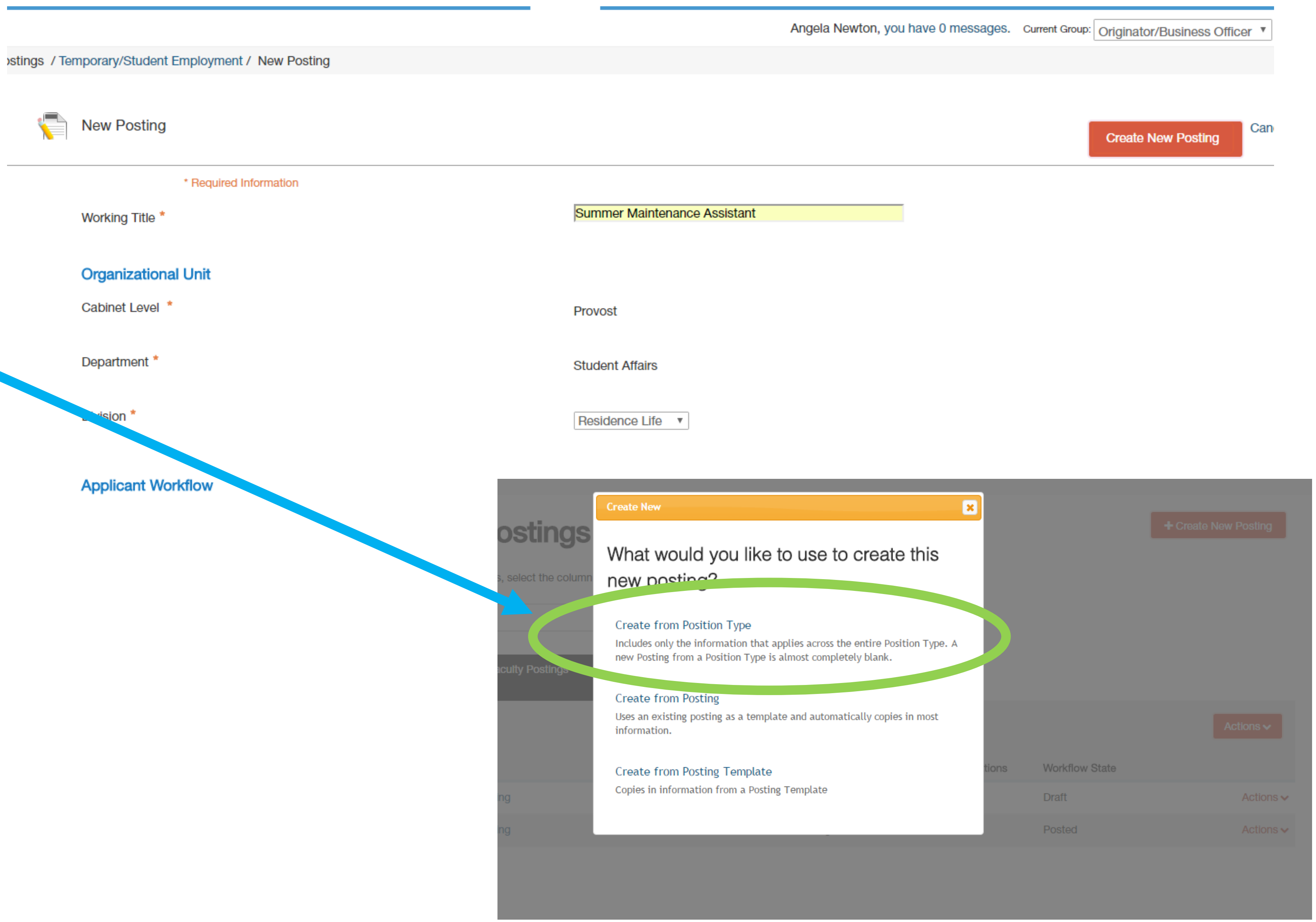
Final HR Review

At this point HR is Responsible for Posting the Position / or Approving the Hiring Proposal

HIRE

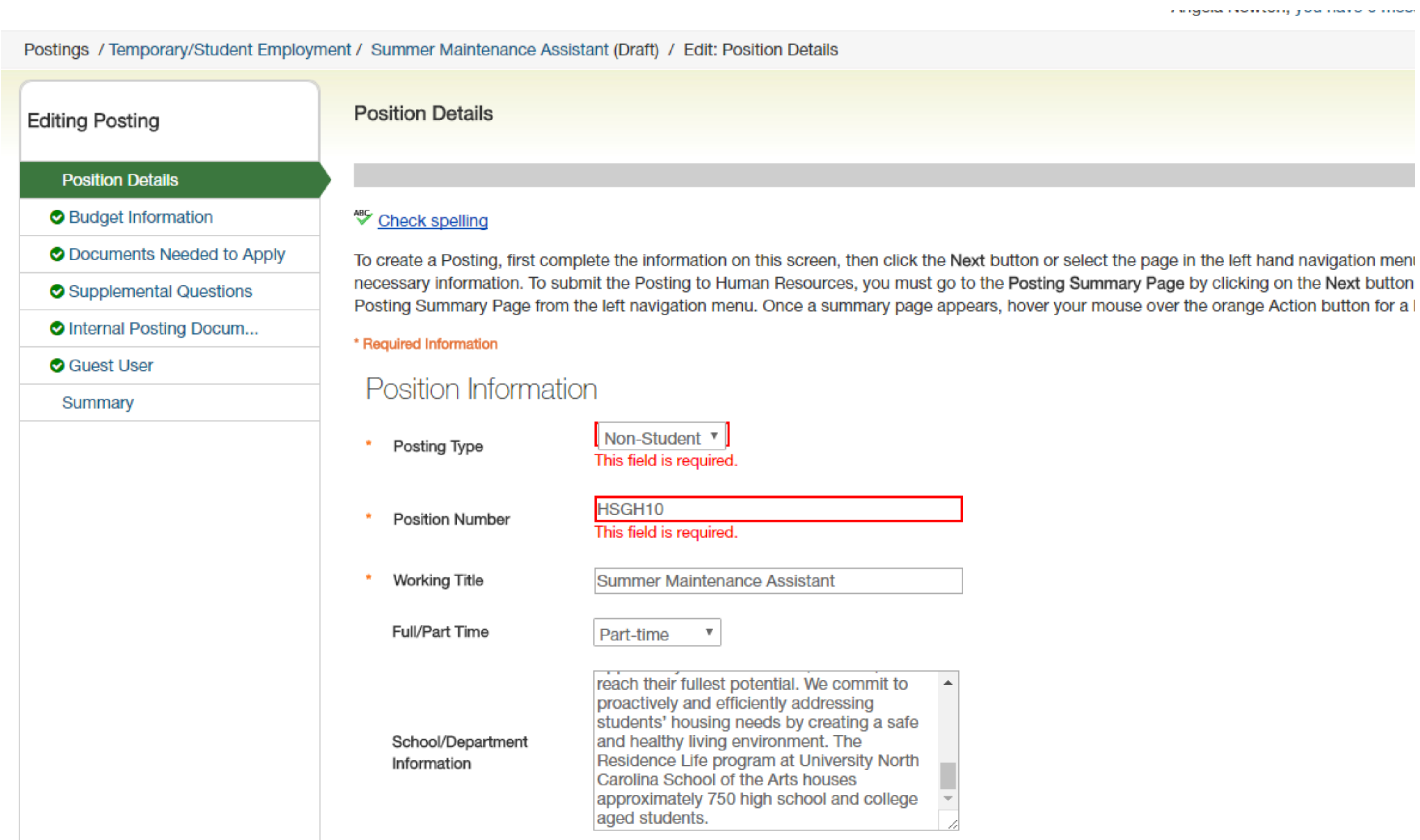
Hover over the Postings Tab and click Temporary / Student Employment.

- Step 1: Create a New Temporary/Student Employment Posting
- Step 2: Select to Create from Position Type
- Step 3: Enter the Position Title, Cabinet Level (Provost), Department, and Division information
  - *Under Supporting Documents* – be sure to check the box to allow for supporting documents to be uploaded to the application.



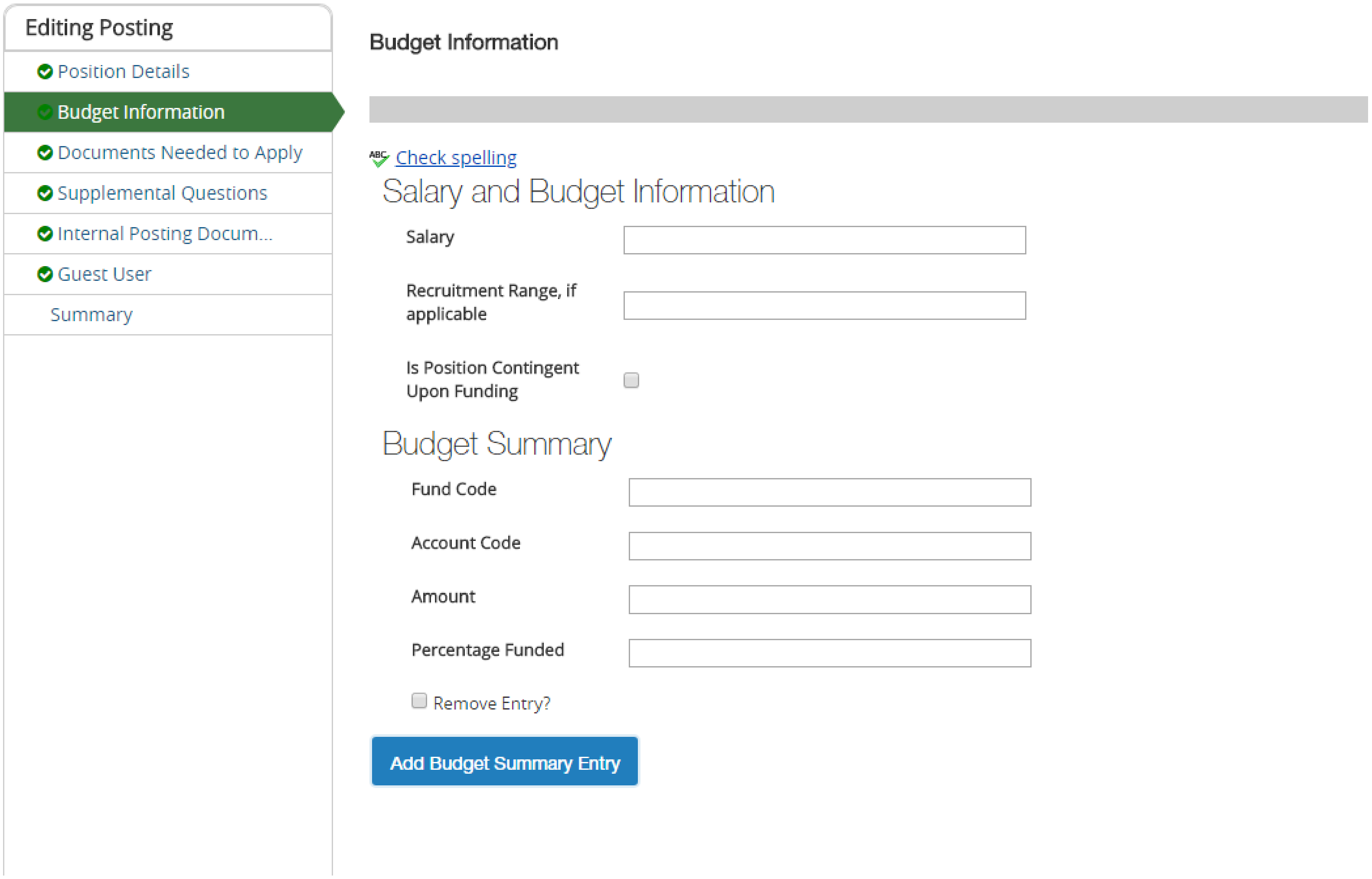
HIRE

- **Step 4**: Enter the **Position Details**
  - Posting Type
  - Position Number
  - Working Title
  - FT/PT Status
  - School Department Information
  - Work Schedule and Hours
  - Description of Responsibilities and Duties
  - Minimum Qualifications
  - FTE
  - Proposed Effective Date
  - Position End date
  - Hiring Manager / Dean / Department Head
  - Originator / Business Officer
  - Open Date
  - Closed Date
  - **PLEASE NOTE:**
    - Terms of Employment should be Terms of Contract



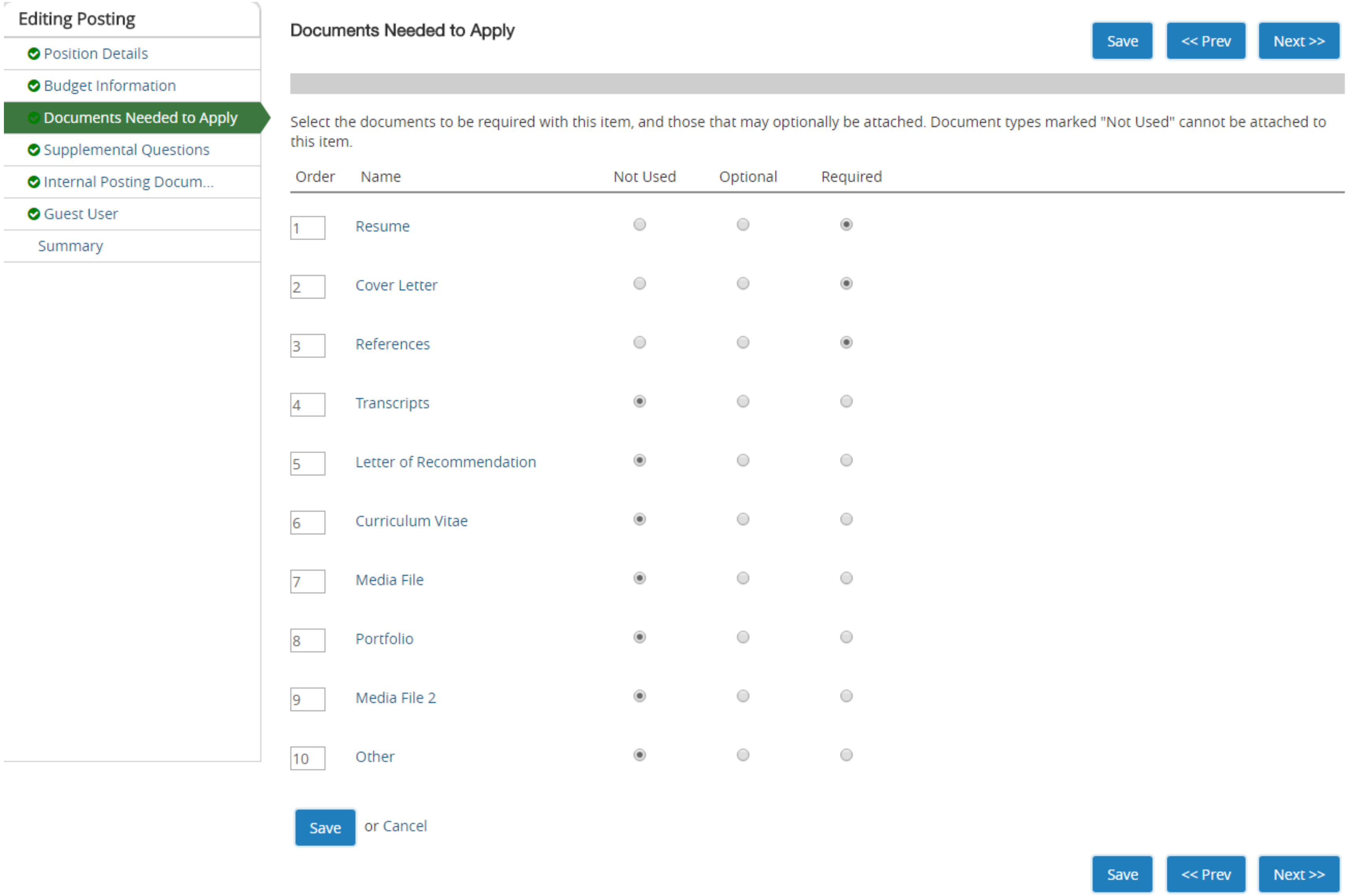
HIRE

- Step 5: **Position Budget**
  - Enter Salary and/or Recruitment range
  - Under Budget Summary
    - Fund Code
    - Account Code
    - Amount
    - Percentage Funded



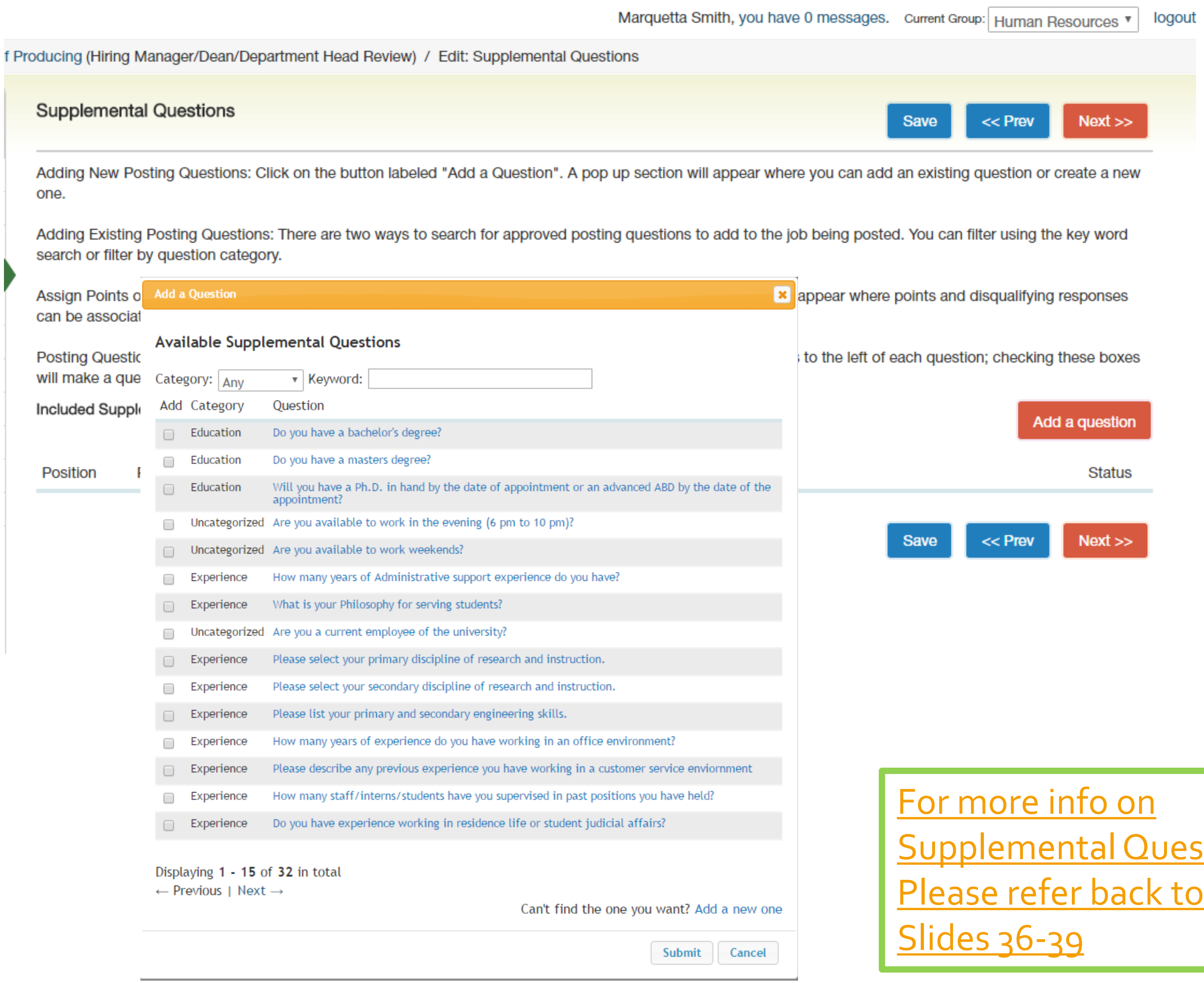
HIRE

- Step 6: **Documents Needed to Apply**
  - Select the necessary documents an applicant must submit to apply for the posting (you may have optional documents as well).



HIRE

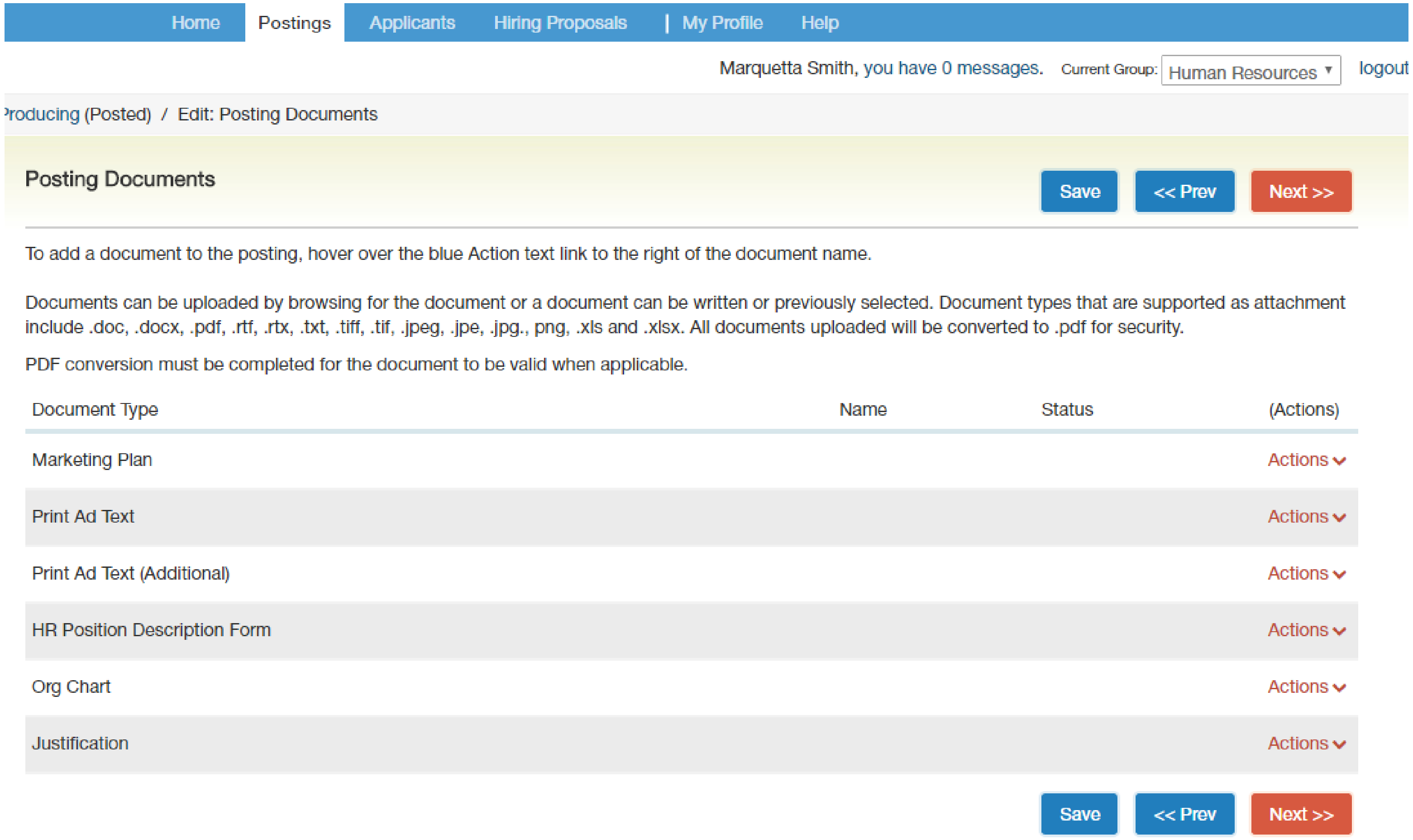
- Step 7: **Supplemental Questions** *(only needed if you plan to ask supplemental questions; if not please skip to the following step*
  - Click on the orange "*Add a question*" button and go through and select questions you would like to ask
    - You can organize the order once you have selected all of the questions
    - You can select which questions will be required
    - If there is a question that does not exist you can add a new one, but HR will have to approve it before it becomes available



For more info on Supplemental Questions: Please refer back to Slides 36-39

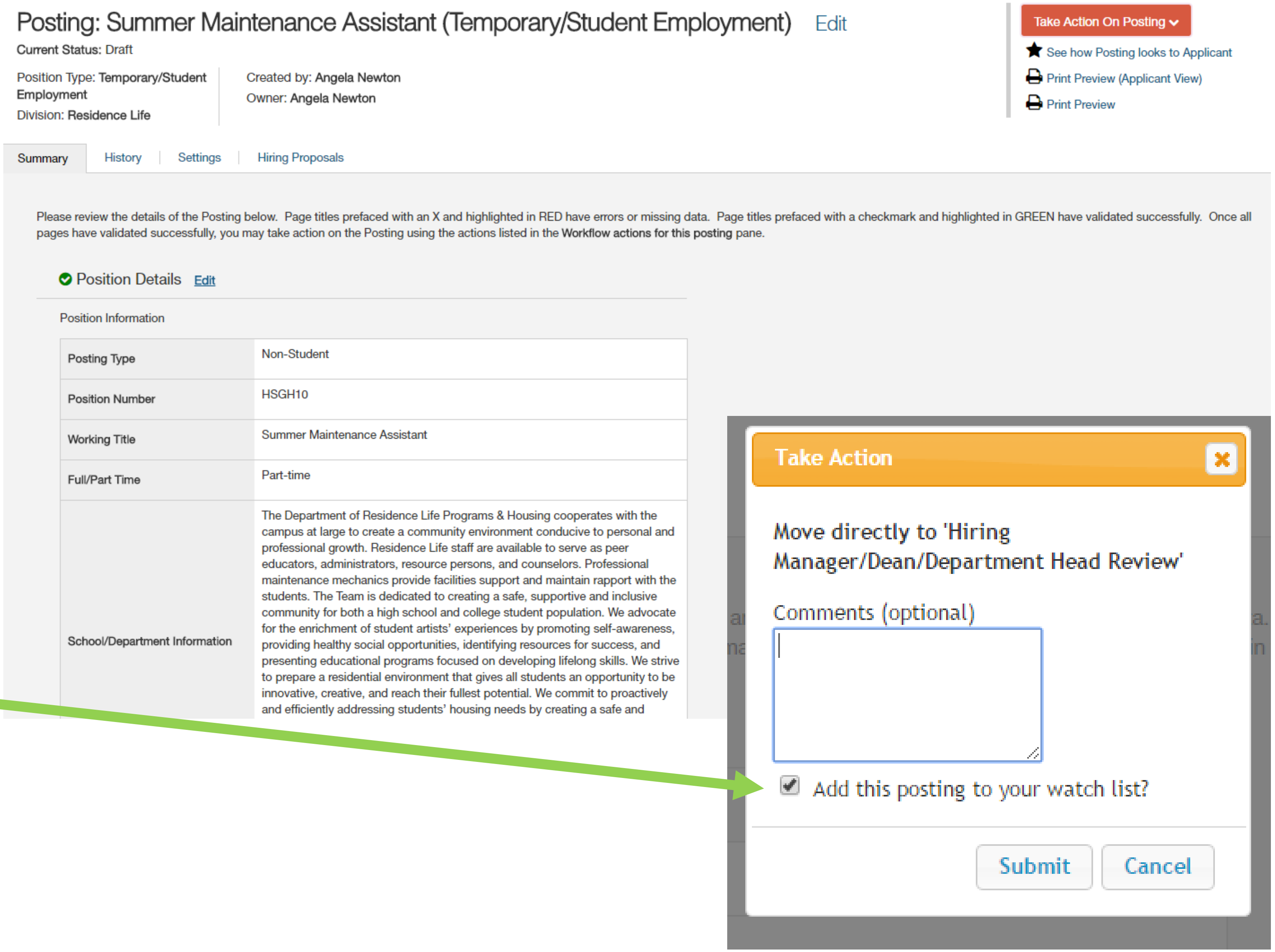
HIRE

- Step 8: Internal Posting Documents
  - Please submit the following:
    - Marketing Plan
      - *List of where are you advertising outside of UNCSA*
    - Print Ad Text – Verbiage of Recruitment Ad *(can be added to the Marketing Plan)*
    - Justification

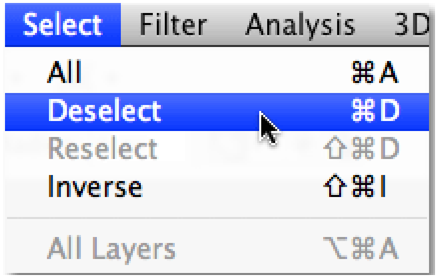


HIRE

- Step 9: Review Summary of Position
  - *Then submit to the Hiring Manager, Dean, or Department Head for approval*
    - *A take Action box will appear for you to submit to the HM/Dean/DH*
      - You can write a message (optional) – this message will also appear in the email generated from the PA System.
      - If you do not wish to add this posting to your watch list, please uncheck the button.
      - Click submit to send to the posting forward.



ANY QUESTIONS?



HOW TO DESELECT CANDIDATES

You need to be located in the HIRE module

In order to deselect a candidate:

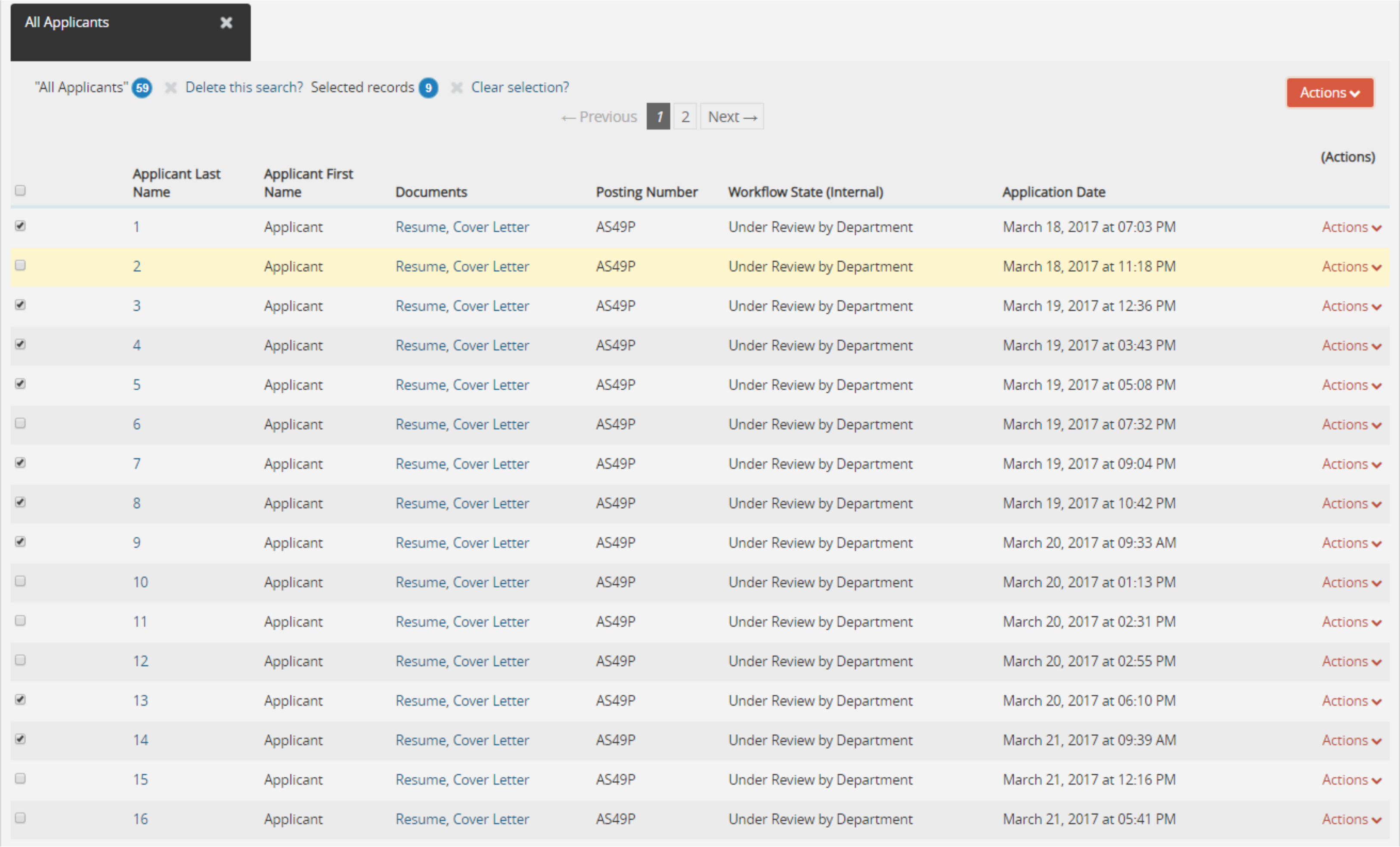
- For **SHRA/EHRA STAFF** and **Temporary Employee** positions, you will need to be logged in as the "**Applicant Reviewer**"
  - *While multiple people can be assigned the Applicant Reviewer, it is strongly encouraged that only the Chair or Hiring Manager deselect.*

- For **EHRA Faculty** positions you will need to be logged in as the "**Search Committee Chair**"
  - *Only one person can be assigned as the Search Chair. We can change access to a different user, but multiple people cannot be assigned to have access at one time.*

In order to deselect a candidate:

- **Step 1**

Logged in as the correct user role choose the applicants you would like to deselect by clicking on the radio buttons associated with the candidates’ name.

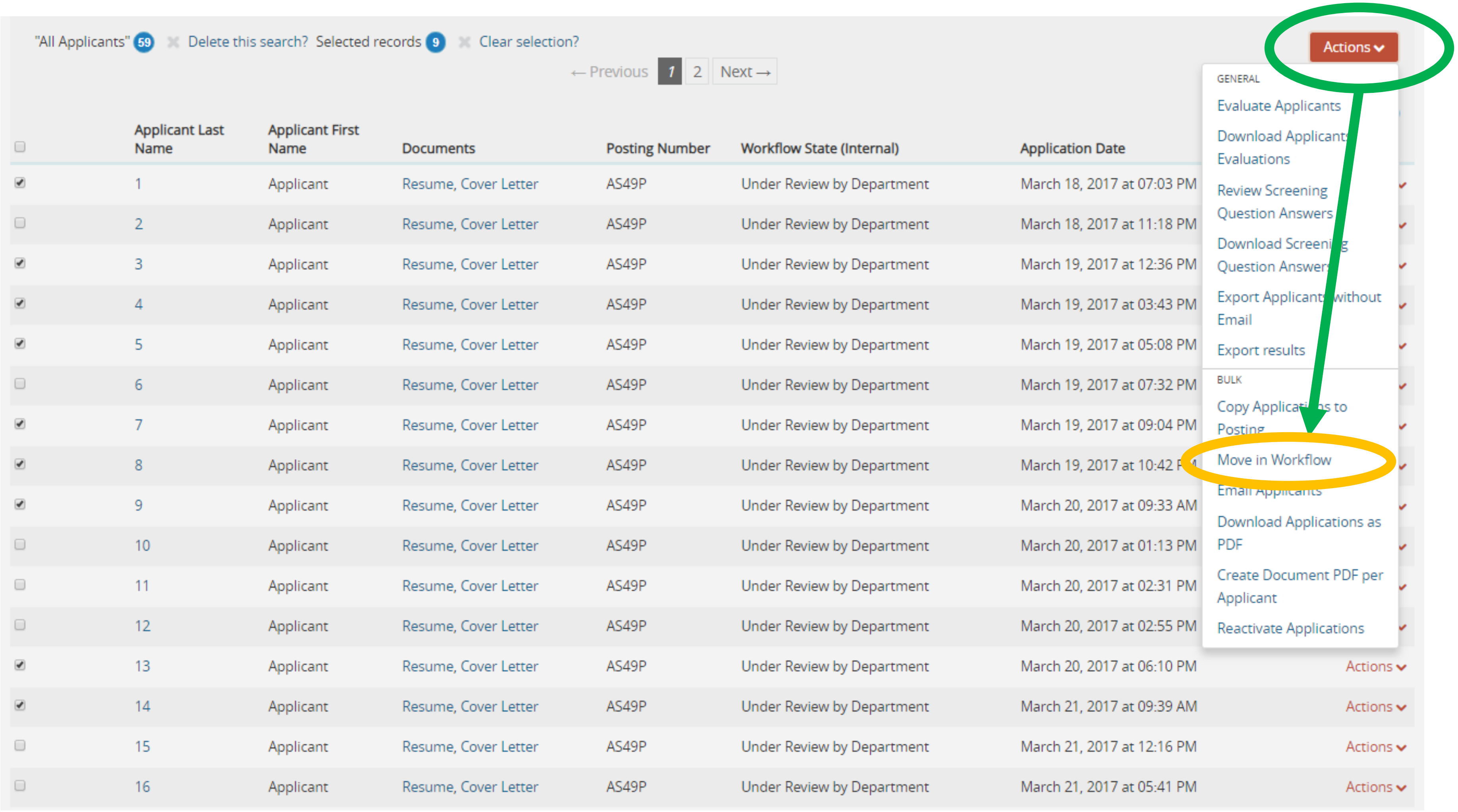


	Applicant Last Name	Applicant First Name	Documents	Posting Number	Workflow State (Internal)	Application Date	
✓	1	Applicant	Resume, Cover Letter	AS49P	Under Review by Department	March 18, 2017 at 07:03 PM	Actions
	2	Applicant	Resume, Cover Letter	AS49P	Under Review by Department	March 18, 2017 at 11:18 PM	Actions
✓	3	Applicant	Resume, Cover Letter	AS49P	Under Review by Department	March 19, 2017 at 12:36 PM	Actions
✓	4	Applicant	Resume, Cover Letter	AS49P	Under Review by Department	March 19, 2017 at 03:43 PM	Actions
✓	5	Applicant	Resume, Cover Letter	AS49P	Under Review by Department	March 19, 2017 at 05:08 PM	Actions
	6	Applicant	Resume, Cover Letter	AS49P	Under Review by Department	March 19, 2017 at 07:32 PM	Actions
✓	7	Applicant	Resume, Cover Letter	AS49P	Under Review by Department	March 19, 2017 at 09:04 PM	Actions
✓	8	Applicant	Resume, Cover Letter	AS49P	Under Review by Department	March 19, 2017 at 10:42 PM	Actions
✓	9	Applicant	Resume, Cover Letter	AS49P	Under Review by Department	March 20, 2017 at 09:33 AM	Actions
	10	Applicant	Resume, Cover Letter	AS49P	Under Review by Department	March 20, 2017 at 01:13 PM	Actions
	11	Applicant	Resume, Cover Letter	AS49P	Under Review by Department	March 20, 2017 at 02:31 PM	Actions
	12	Applicant	Resume, Cover Letter	AS49P	Under Review by Department	March 20, 2017 at 02:55 PM	Actions
✓	13	Applicant	Resume, Cover Letter	AS49P	Under Review by Department	March 20, 2017 at 06:10 PM	Actions
✓	14	Applicant	Resume, Cover Letter	AS49P	Under Review by Department	March 21, 2017 at 09:39 AM	Actions
	15	Applicant	Resume, Cover Letter	AS49P	Under Review by Department	March 21, 2017 at 12:16 PM	Actions
	16	Applicant	Resume, Cover Letter	AS49P	Under Review by Department	March 21, 2017 at 05:41 PM	Actions

In order to deselect a candidate:

- **Step 2**

Click on the **orange** "**Actions**" button and select "move in workflow."

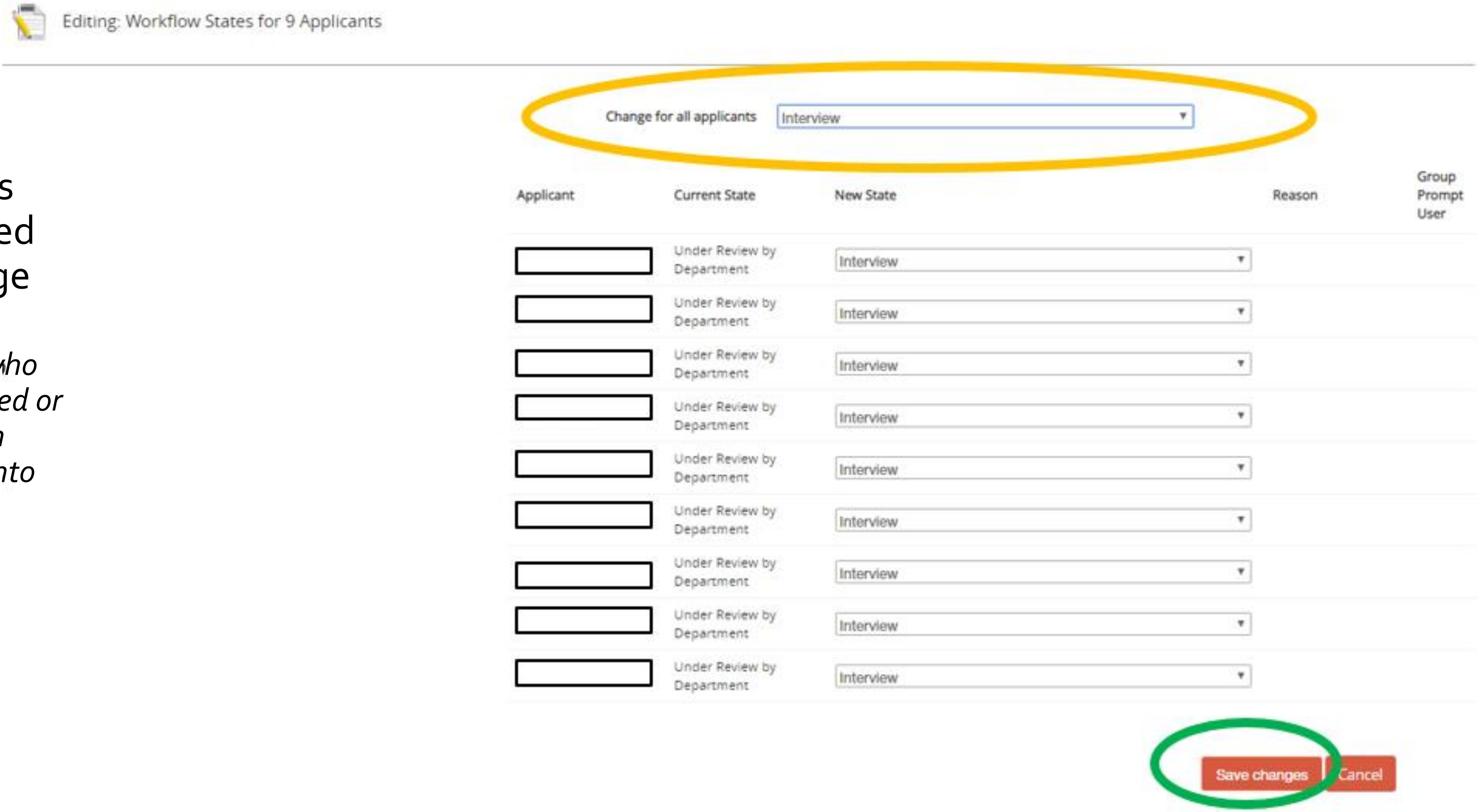


In order to deselect a candidate:

- **Step 3**

Move the candidates who were interviewed to the interview stage and save changes.

- *The means anyone who was phone interviewed or received an in-person interview/ brought onto campus*



In order to deselect a candidate:

You will notice when you go back to the list of applicants, different persons are in different workflow states. You can no longer do a bulk “move in workflow” unless you get alike persons under one workflow state.

"All Applicants" 59 Delete this search? Selected records 0 Clear selection?

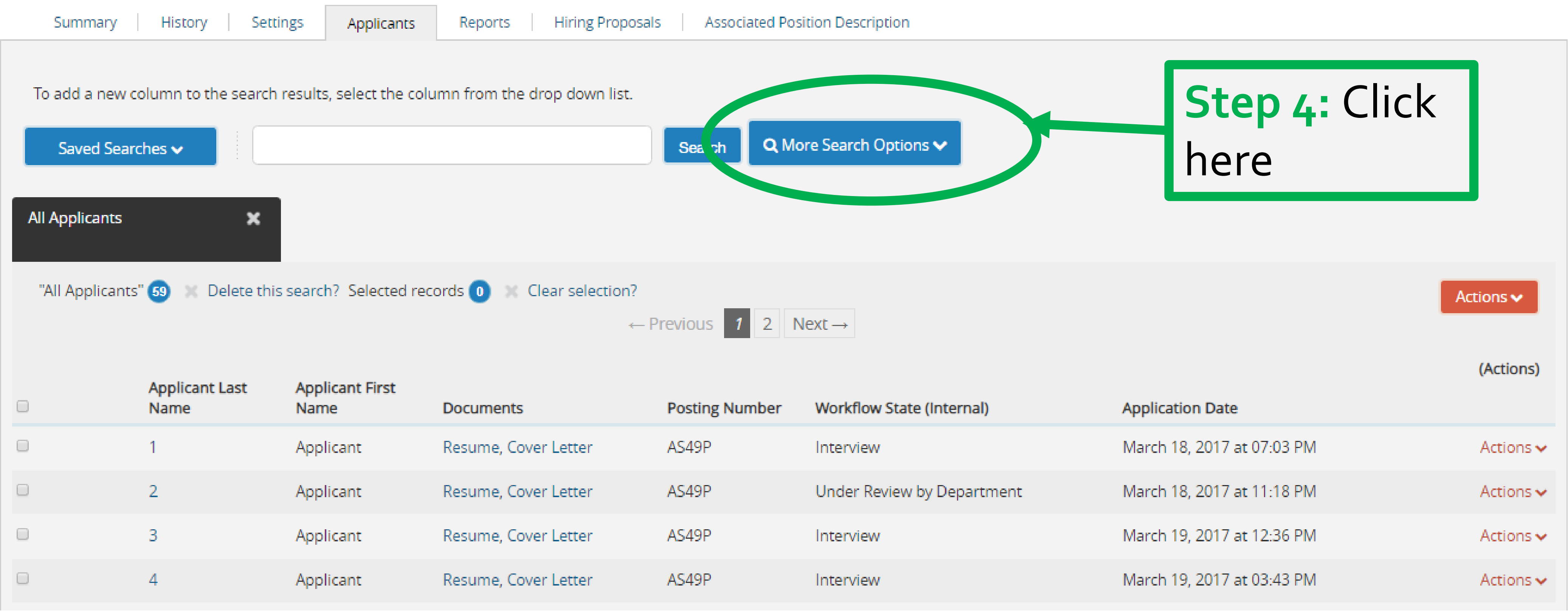
← Previous 1 2 Next →

Actions

Applicant Last Name	Applicant First Name	Documents	Posting Number	Workflow State (Internal)	Application Date	(Actions)
1	Applicant	Resume, Cover Letter	AS49P	Interview	March 18, 2017 at 07:03 PM	Actions
2	Applicant	Resume, Cover Letter	AS49P	Under Review by Department	March 18, 2017 at 11:18 PM	Actions
3	Applicant	Resume, Cover Letter	AS49P	Interview	March 19, 2017 at 12:36 PM	Actions
4	Applicant	Resume, Cover Letter	AS49P	Interview	March 19, 2017 at 03:43 PM	Actions
5	Applicant	Resume, Cover Letter	AS49P	Interview	March 19, 2017 at 05:08 PM	Actions
6	Applicant	Resume, Cover Letter	AS49P	Under Review by Department	March 19, 2017 at 07:32 PM	Actions
7	Applicant	Resume, Cover Letter	AS49P	Interview	March 19, 2017 at 09:04 PM	Actions
8	Applicant	Resume, Cover Letter	AS49P	Interview	March 19, 2017 at 10:42 PM	Actions
9	Applicant	Resume, Cover Letter	AS49P	Interview	March 20, 2017 at 09:33 AM	Actions
10	Applicant	Resume, Cover Letter	AS49P	Under Review by Department	March 20, 2017 at 01:13 PM	Actions
11	Applicant	Resume, Cover Letter	AS49P	Under Review by Department	March 20, 2017 at 02:31 PM	Actions
12	Applicant	Resume, Cover Letter	AS49P	Under Review by Department	March 20, 2017 at 02:55 PM	Actions
13	Applicant	Resume, Cover Letter	AS49P	Interview	March 20, 2017 at 06:10 PM	Actions
14	Applicant	Resume, Cover Letter	AS49P	Interview	March 21, 2017 at 09:39 AM	Actions
15	Applicant	Resume, Cover Letter	AS49P	Under Review by Department	March 21, 2017 at 12:16 PM	Actions
16	Applicant	Resume, Cover Letter	AS49P	Under Review by Department	March 21, 2017 at 05:41 PM	Actions

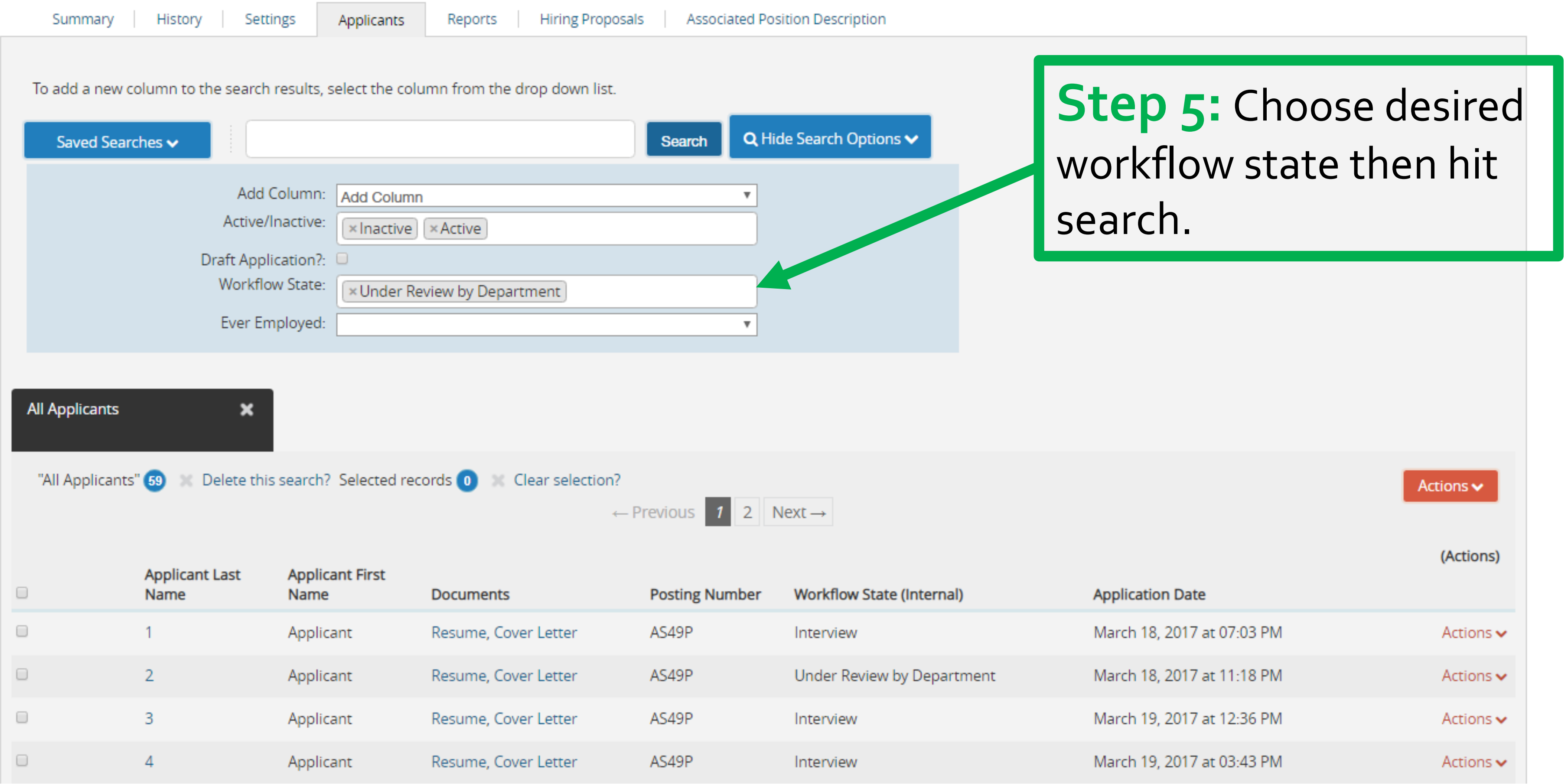
In order to deselect a candidate:

In order to do so, click on more search options and choose the desired workflow state you wish to continue deselecting form. Then click search.



In order to deselect a candidate:

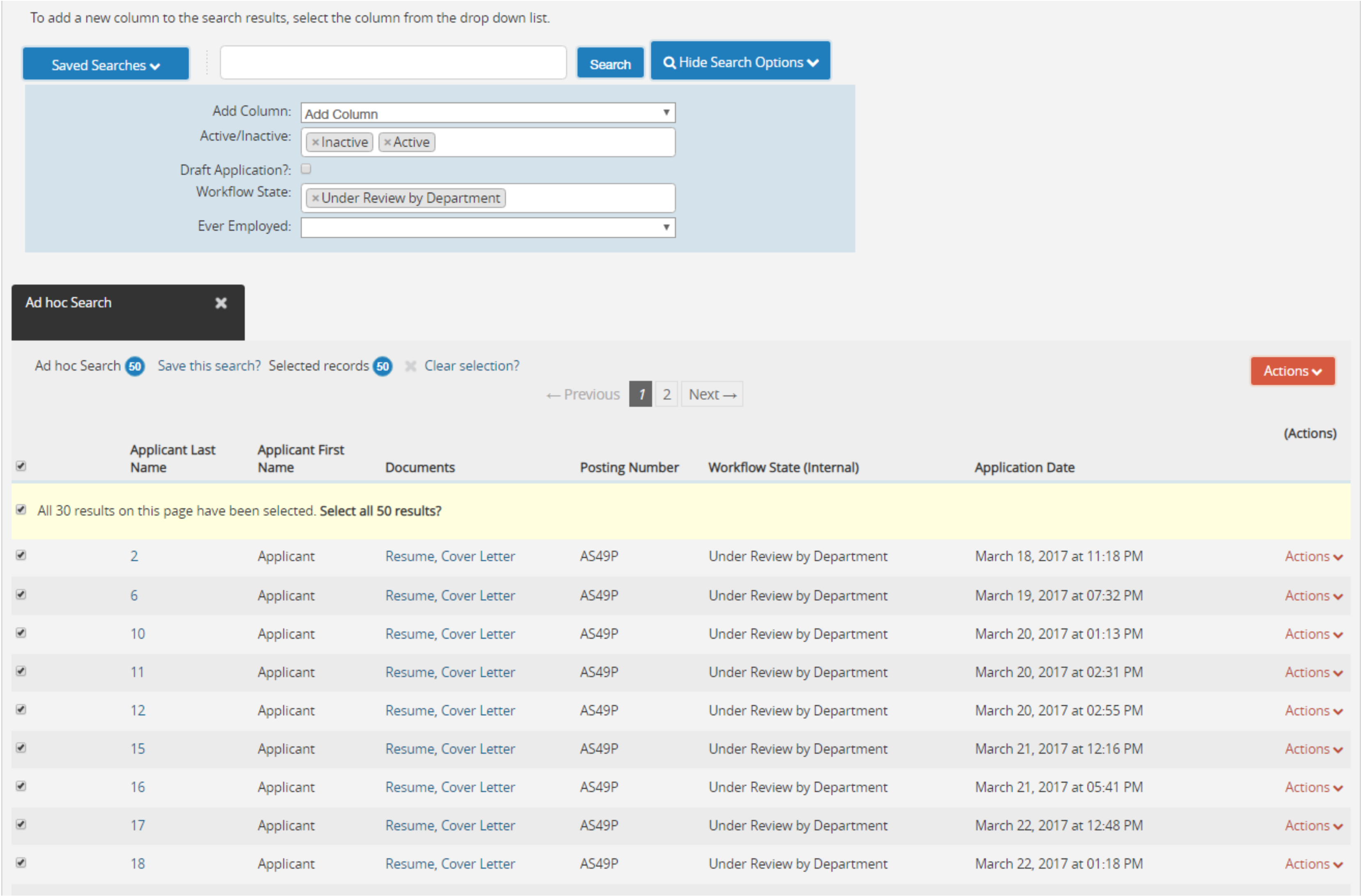
In order to do so, click on more search options and choose the desired workflow state you wish to continue deselecting form. Then click search.



In order to deselect a candidate:

Now that you have applicants who are in a similar workflow state you can continue to "bulk deselect" candidates.

- *Repeat steps 4 & 5 as needed.*



In order to deselect a candidate:

Now that you have applicants who are in a similar workflow state you can continue to “bulk deselect” candidates.

- *Repeat steps 4 & 5 as needed.*

"All Applicants" 59 Delete this search? Selected records 0 Clear selection?

Actions

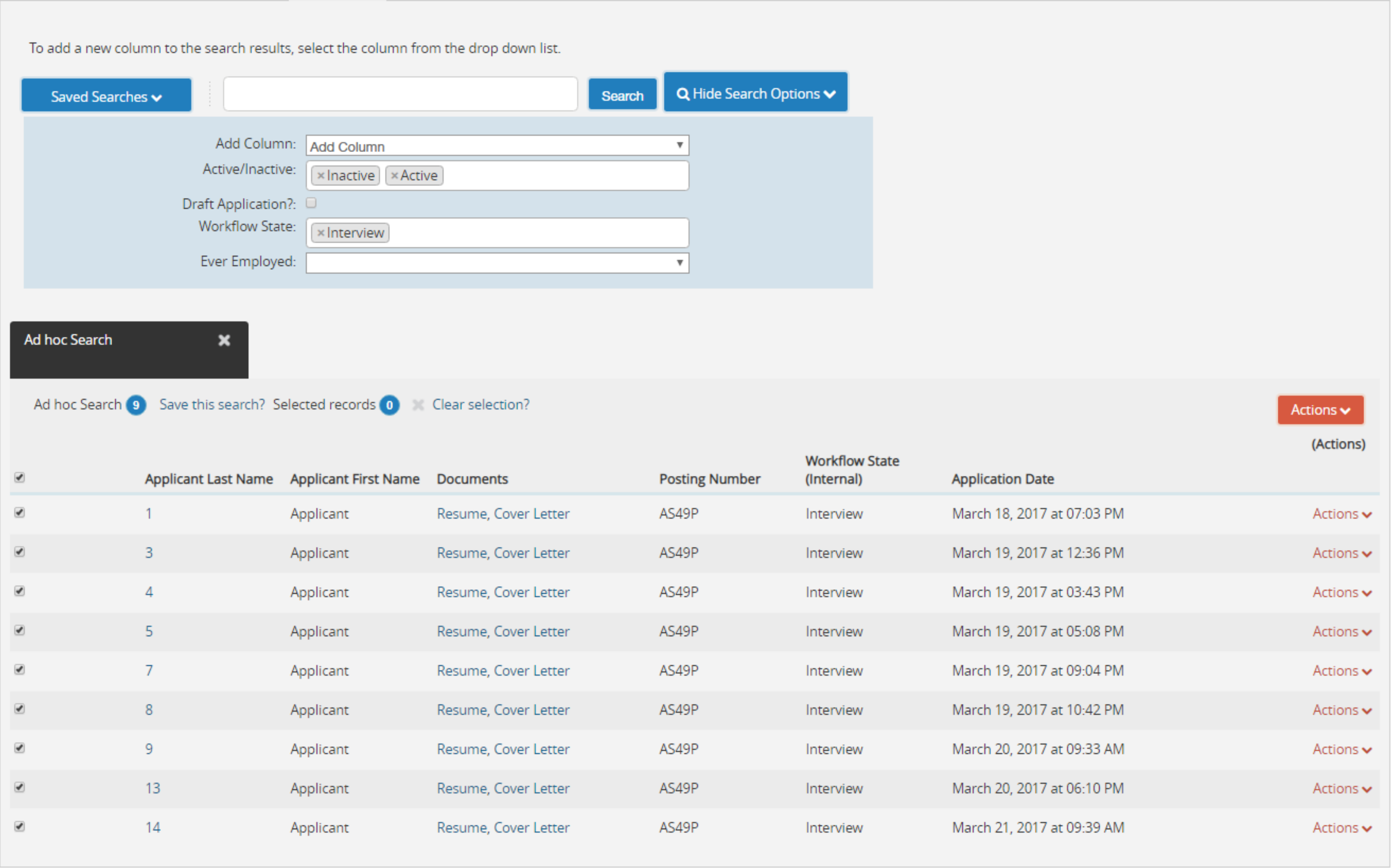
← Previous 1 2 Next →

	Applicant Last Name	Applicant First Name	Documents	Posting Number	Workflow State (Internal)	Application Date	(Actions)
	1	Applicant	Resume, Cover Letter	AS49P	Interview	March 18, 2017 at 07:03 PM	Actions
	2	Applicant	Resume, Cover Letter	AS49P	Not Selected - Final Email at Filled	March 18, 2017 at 11:18 PM	Actions
	3	Applicant	Resume, Cover Letter	AS49P	Interview	March 19, 2017 at 12:36 PM	Actions
	4	Applicant	Resume, Cover Letter	AS49P	Interview	March 19, 2017 at 03:43 PM	Actions
	5	Applicant	Resume, Cover Letter	AS49P	Interview	March 19, 2017 at 05:08 PM	Actions
	6	Applicant	Resume, Cover Letter	AS49P	Not Selected - Final Email at Filled	March 19, 2017 at 07:32 PM	Actions
	7	Applicant	Resume, Cover Letter	AS49P	Interview	March 19, 2017 at 09:04 PM	Actions
	8	Applicant	Resume, Cover Letter	AS49P	Interview	March 19, 2017 at 10:42 PM	Actions
	9	Applicant	Resume, Cover Letter	AS49P	Interview	March 20, 2017 at 09:33 AM	Actions
	10	Applicant	Resume, Cover Letter	AS49P	Not Selected - Final Email at Filled	March 20, 2017 at 01:13 PM	Actions
	11	Applicant	Resume, Cover Letter	AS49P	Not Selected - Final Email at Filled	March 20, 2017 at 02:31 PM	Actions
	12	Applicant	Resume, Cover Letter	AS49P	Not Selected - Final Email at Filled	March 20, 2017 at 02:55 PM	Actions
	13	Applicant	Resume, Cover Letter	AS49P	Interview	March 20, 2017 at 06:10 PM	Actions
	14	Applicant	Resume, Cover Letter	AS49P	Interview	March 21, 2017 at 09:39 AM	Actions
	15	Applicant	Resume, Cover Letter	AS49P	Not Selected - Final Email at Filled	March 21, 2017 at 12:16 PM	Actions
	16	Applicant	Resume, Cover Letter	AS49P	Not Selected - Final Email at Filled	March 21, 2017 at 05:41 PM	Actions

In order to deselect a candidate:

Now that you have applicants who are in a similar workflow state you can continue to "bulk deselect" candidates.

- *Repeat steps 4 & 5 as needed.*



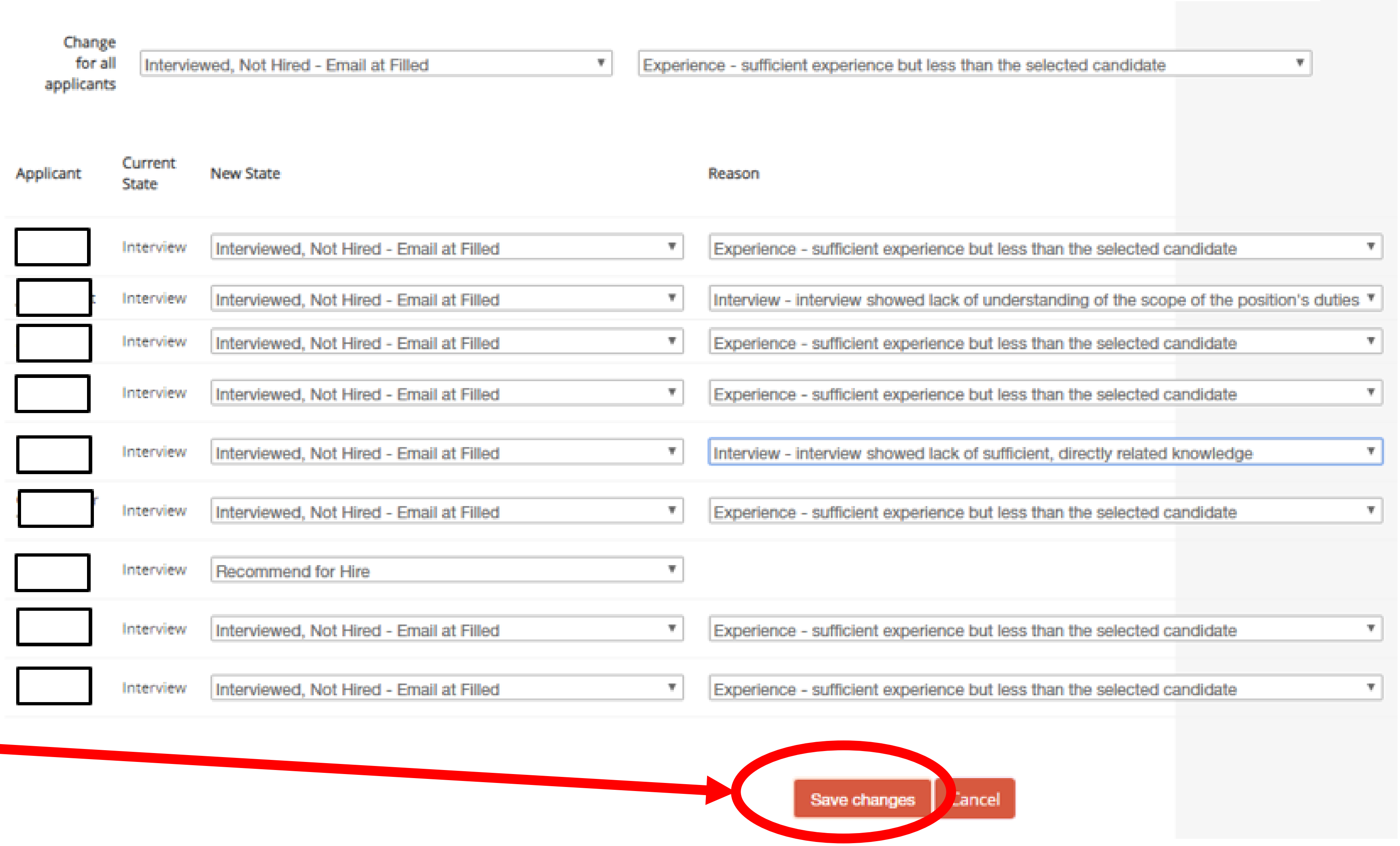
In order to deselect a candidate:

EXAMPLE

Now that you have applicants who are in a similar workflow state you can continue to "bulk deselect" candidates.

- *Repeat steps 4 & 5 as needed.*

If doing a "bulk" move in workflow while deselecting, you can choose a standard state and reason change for all applicants but still go through and put the desired workflow state and reason for each candidate. Be sure to save changes. *See example.*



In order to deselect a candidate:

- If at any point you have issues with “bulk” deselecting you can continue to move candidates through the workflow process by clicking on each individual candidates’ hyperlink and going into their application.

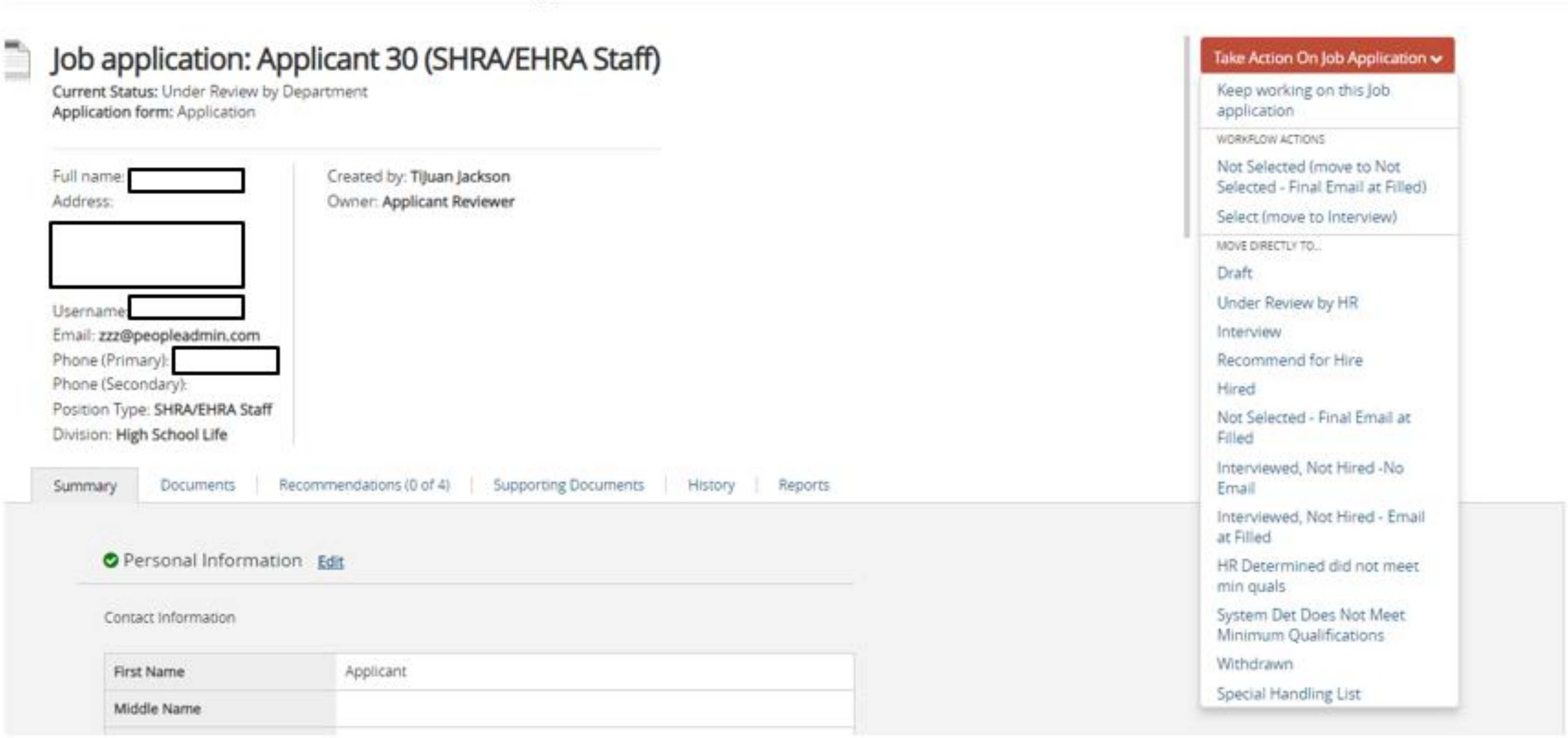
Click on hyperlink to go into the application.

	24	Applicant	Resume, Cover Letter	AS49P	Not Selected - Final Email at Filled	March 27, 2017 at 03:54 PM	Actions
	25	Applicant	Resume, Cover Letter	AS49P	Not Selected - Final Email at Filled	March 27, 2017 at 04:47 PM	Actions
	26	Applicant	Resume, Cover Letter	AS49P	Not Selected - Final Email at Filled	March 28, 2017 at 03:47 AM	Actions
	27	Applicant	Resume, Cover Letter	AS49P	Not Selected - Final Email at Filled	March 28, 2017 at 11:11 PM	Actions
	28	Applicant	Resume, Cover Letter	AS49P	Not Selected - Final Email at Filled	March 29, 2017 at 10:24 AM	Actions
	29	Applicant	Resume, Cover Letter	AS49P	Not Selected - Final Email at Filled	March 29, 2017 at 08:16 PM	Actions
	30	Applicant	Resume, Cover Letter	AS49P	Under Review by Department	March 29, 2017 at 10:29 PM	Actions

← Previous 1 2 Next →

In order to deselect a candidate:

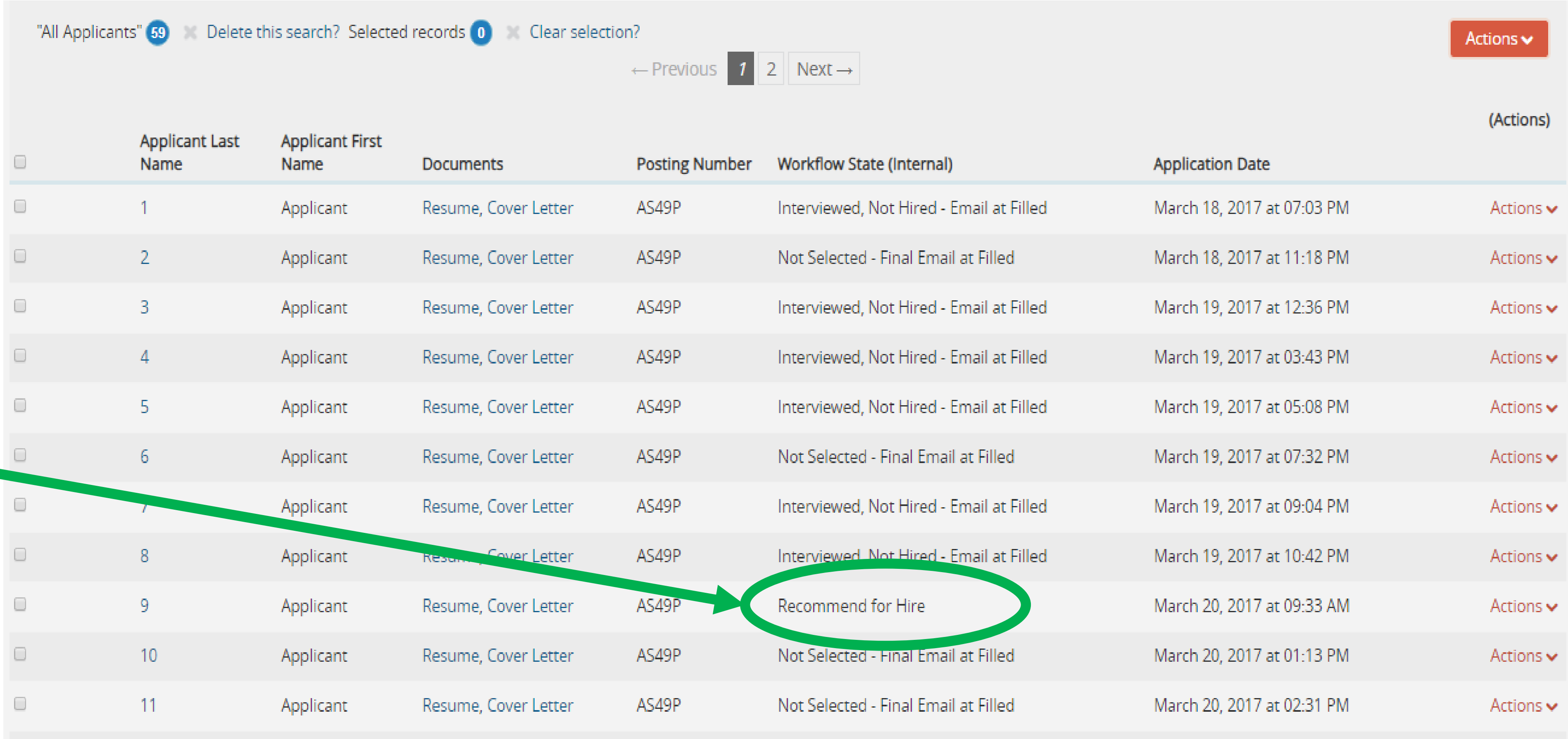
- When viewing someone's application you will need to click on the **orange** "Take Action on Job Application" and select the desired workflow state for the candidate and the desired reason code (*if needed*).



In order to deselect a candidate:

- **Step 6**

When you have chosen the desired candidate and are ready to hire, please make sure this candidate is in the "**Recommend for Hire**" workflow state so you can begin the Hiring Proposal.



"All Applicants" 59 Delete this search? Selected records 0 Clear selection?

Actions

← Previous 1 2 Next →

	Applicant Last Name	Applicant First Name	Documents	Posting Number	Workflow State (Internal)	Application Date	(Actions)
	1	Applicant	Resume, Cover Letter	AS49P	Interviewed, Not Hired - Email at Filled	March 18, 2017 at 07:03 PM	Actions
	2	Applicant	Resume, Cover Letter	AS49P	Not Selected - Final Email at Filled	March 18, 2017 at 11:18 PM	Actions
	3	Applicant	Resume, Cover Letter	AS49P	Interviewed, Not Hired - Email at Filled	March 19, 2017 at 12:36 PM	Actions
	4	Applicant	Resume, Cover Letter	AS49P	Interviewed, Not Hired - Email at Filled	March 19, 2017 at 03:43 PM	Actions
	5	Applicant	Resume, Cover Letter	AS49P	Interviewed, Not Hired - Email at Filled	March 19, 2017 at 05:08 PM	Actions
	6	Applicant	Resume, Cover Letter	AS49P	Not Selected - Final Email at Filled	March 19, 2017 at 07:32 PM	Actions
	7	Applicant	Resume, Cover Letter	AS49P	Interviewed, Not Hired - Email at Filled	March 19, 2017 at 09:04 PM	Actions
	8	Applicant	Resume, Cover Letter	AS49P	Interviewed, Not Hired - Email at Filled	March 19, 2017 at 10:42 PM	Actions
	9	Applicant	Resume, Cover Letter	AS49P	Recommend for Hire	March 20, 2017 at 09:33 AM	Actions
	10	Applicant	Resume, Cover Letter	AS49P	Not Selected - Final Email at Filled	March 20, 2017 at 01:13 PM	Actions
	11	Applicant	Resume, Cover Letter	AS49P	Not Selected - Final Email at Filled	March 20, 2017 at 02:31 PM	Actions

Deselection Codes

- For access to deselection codes please contact HR.

ANY QUESTIONS?

HOW TO COMPLETE HIRING PROPOSAL

You need to be located in the HIRE module

HIRING PROPOSAL

- *We no longer need the 105, 202, 301, or 401 to be completed if hiring is completed through the PeopleAdmin System.*

- *As mentioned before, the candidate you wish to hire must be in the "**Recommend for Hire**" workflow state.*

- *Only the Originator/Business Officer or Hiring Manager/ Dean / Department Head tied to the posting will have access to begin the Hiring Proposal once the candidate is in the required workflow state.*

Completing HIRING PROPOSAL

- ***Step 1:***

*Persons who have access to begin the HP will need to click on the candidate's application and click on **START HIRING PROPOSAL**.*

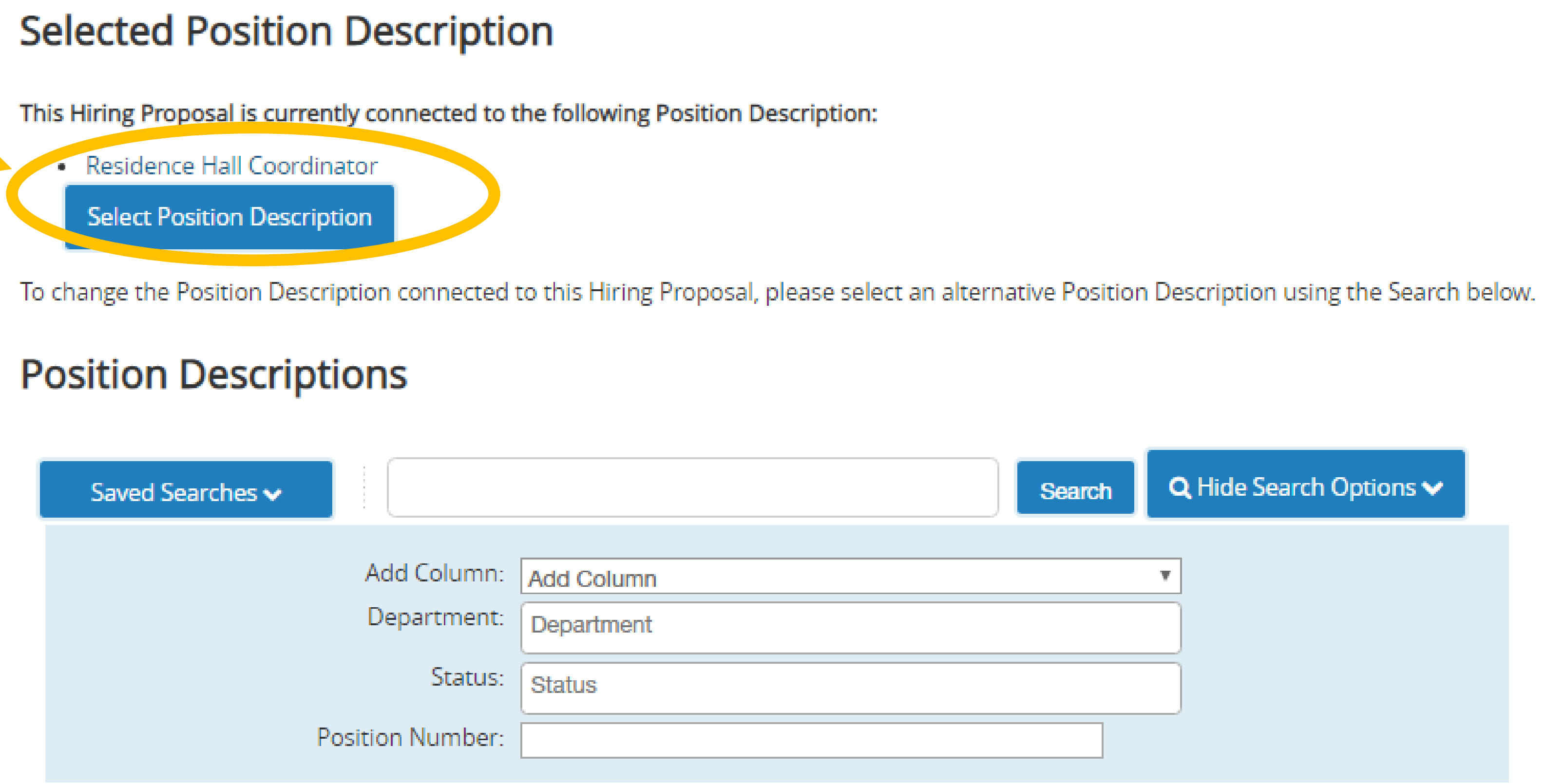
Completing HIRING PROPOSAL

- ***Step 2:***

Choose the desired position description.

FOR STAFF POSITIONS ONLY:

If using a posting to fill multiple positions be sure you are choosing the correct position that will correspond with each candidate. For these special cases, you can call HR for assistance.

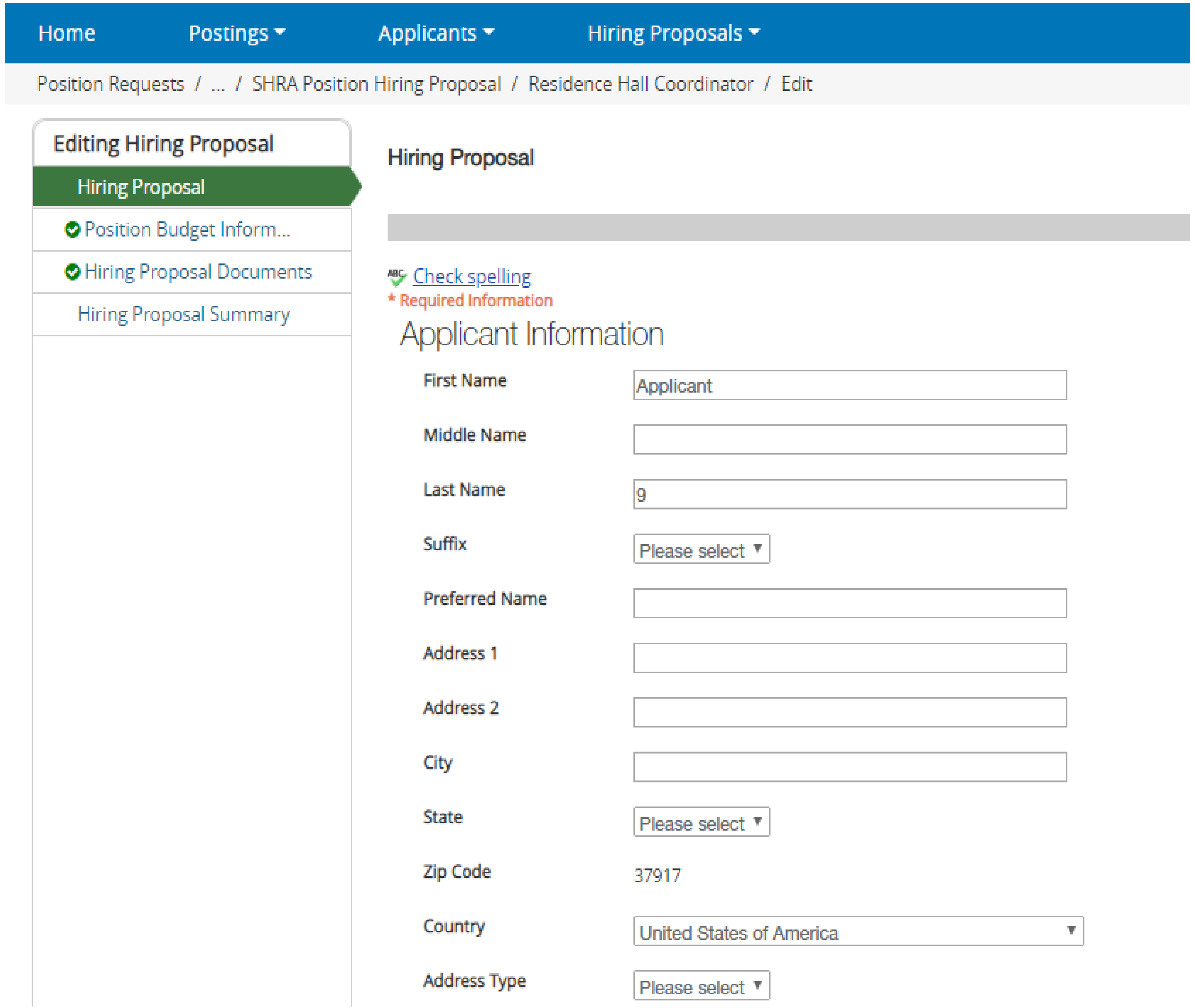


Completing HIRING PROPOSAL

Step 3:

Fill in the following information under the Hiring Proposal Tab:

- All applicant and position information should auto-fill within the Hiring Proposal.
- **Applicant Information**
  - Information will pull from the candidate's application
  - Please be sure their name, address, telephone number, & email address are present on the HP
  - **Then scroll down to the position information.**

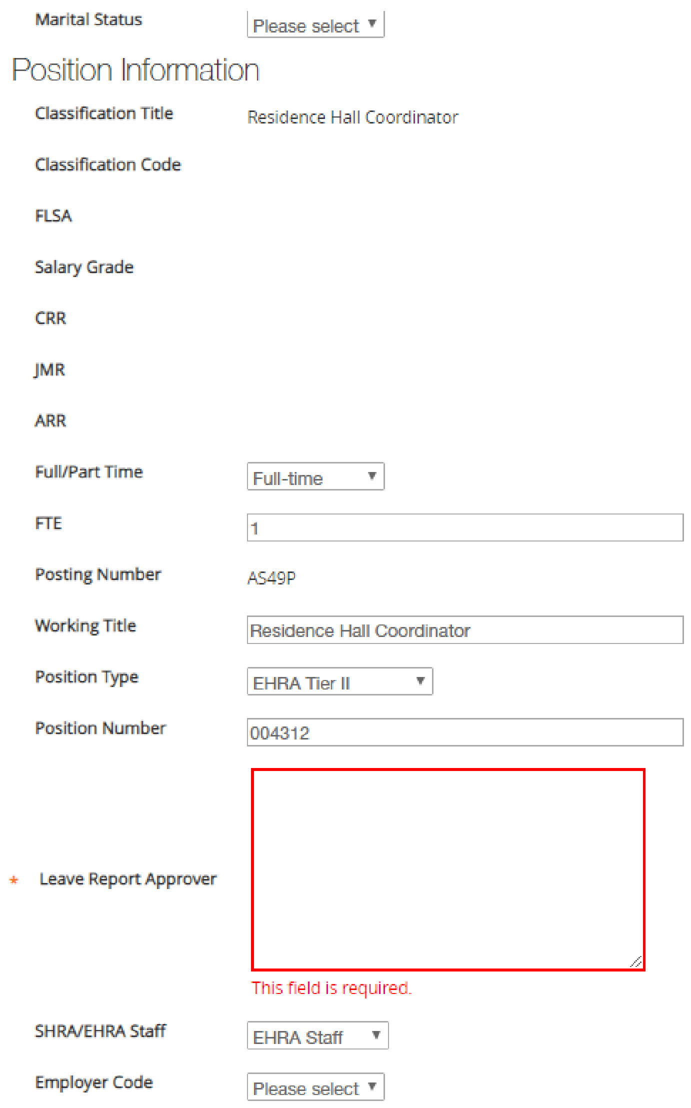


Completing HIRING PROPOSAL

Step 4:

Fill in the following information under the Hiring Proposal Tab:

- ## Position Information
  - Information will pull from the position description
  - Please be sure the following are correct:
    - Position Title
    - Position Number
    - FT/PT Status
    - FTE
    - **For Faculty: check whether the candidate will be a Faculty Serving as an Advisor and MYC Contract Length**
    - Leave report Approver
    - **Then scroll down to Hiring Proposal Information.**



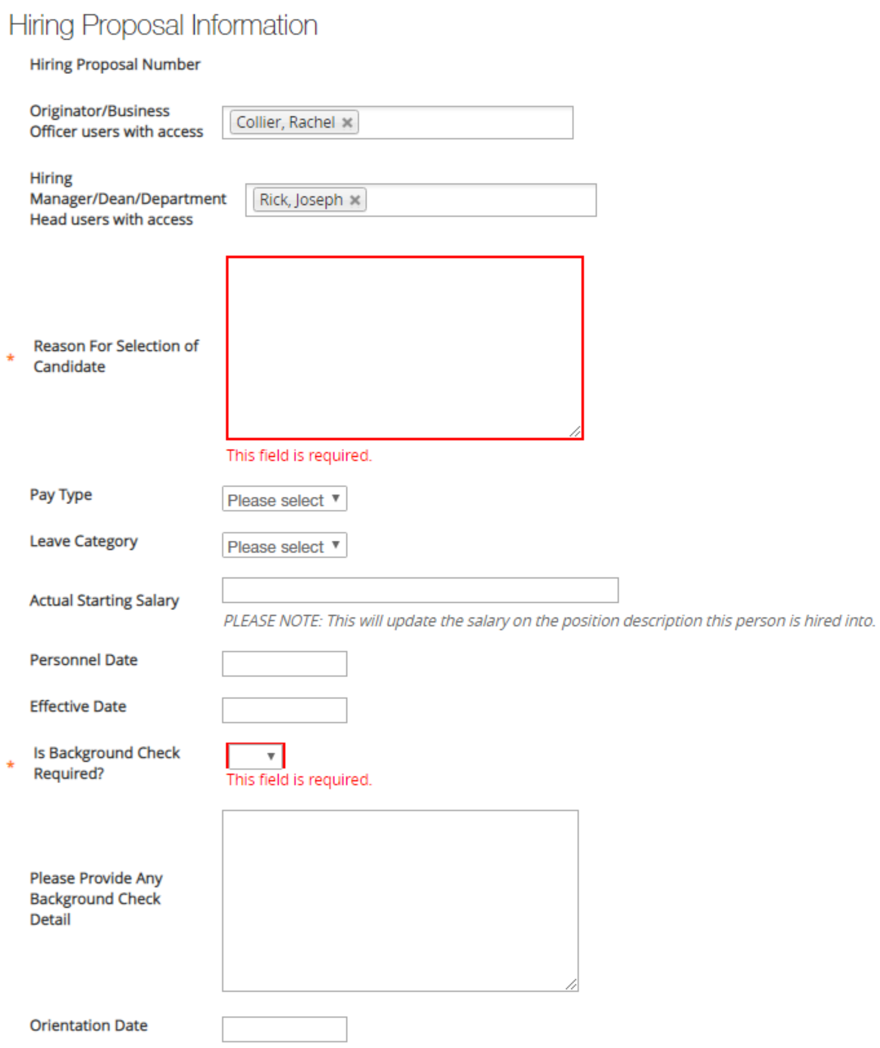
Completing HIRING PROPOSAL

Step 5:

Fill in the following information under the Hiring Proposal Tab:

Hiring Proposal Information

- Please be sure to enter the following information:
  - Reason for Selected Candidate *(a minimum of 2-3 speaking to their experience and qualifications)*
  - Pay Type (Hourly/Salary)
  - Actual Starting Salary
  - Personnel Date
  - Effective Date
  - ***Appt End Date*** *if a temporary employee*
  - Background Check Required Field (*Always yes except for Student Jobs*)
  - **Be sure to save all changes then continue to Position Budget Information.**


Hiring Proposal Information

Hiring Proposal Number

Originator/Business Officer users with access: Collier, Rachel

Hiring Manager/Dean/Department Head users with access: Rick, Joseph

* Reason For Selection of Candidate

This field is required.

Pay Type: Please select

Leave Category: Please select

Actual Starting Salary

PLEASE NOTE: This will update the salary on the position description this person is hired into.

Personnel Date

Effective Date

* Is Background Check Required?

This field is required.

Please Provide Any Background Check Detail

Orientation Date

Completing HIRING PROPOSAL

Example of Justification needed for Hiring Proposal:

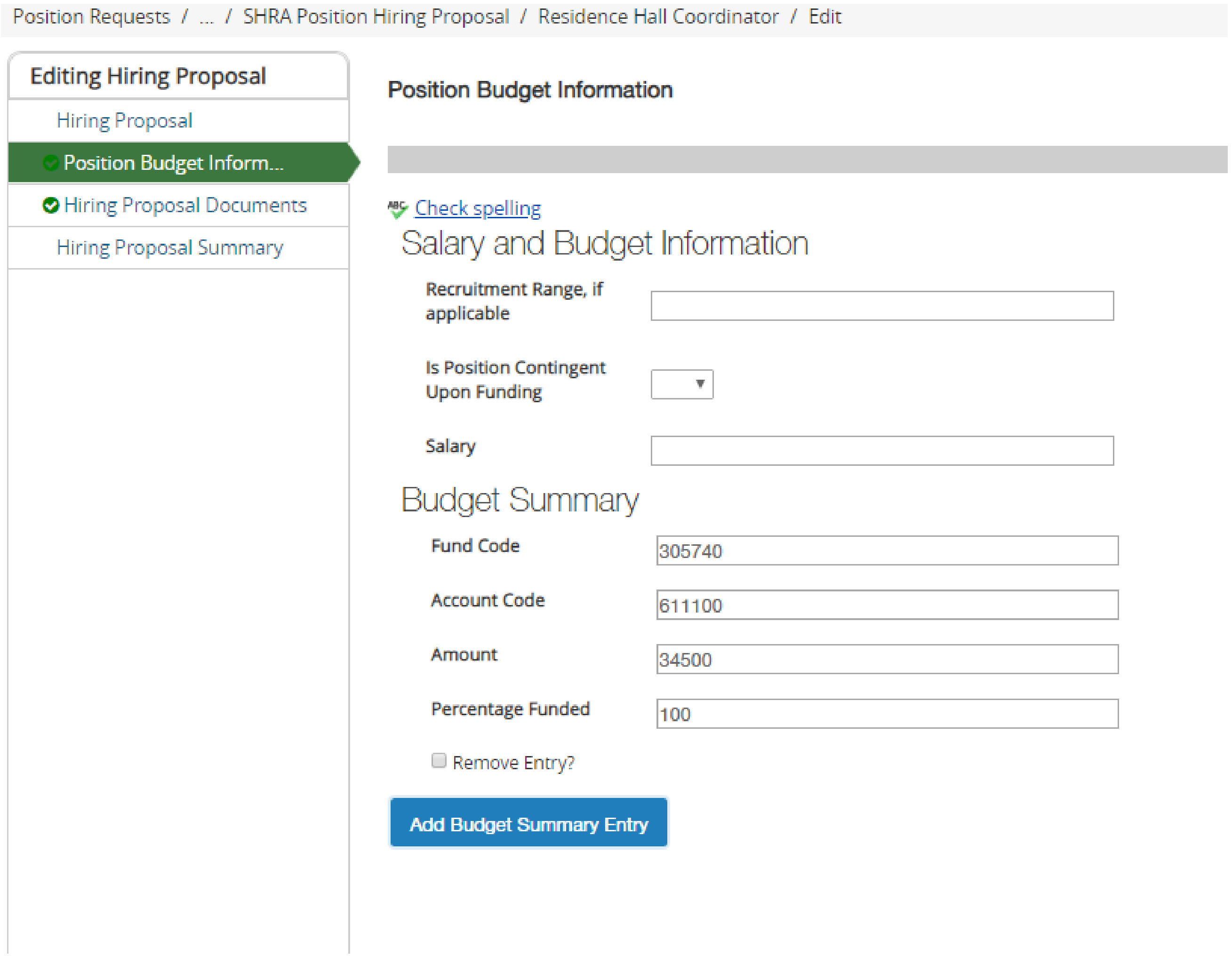
Jane Smith's education includes a B.A. degree in a related study area, which is a requirement for this position. Her experience includes business administration, financial management, personnel planning, and the supervision of others. Jane also has related experience with university office forms and duties associated with a Business Officer. The position requires that personnel work closely with the Department Head in ensuring the smooth operation of the department as a service provider. A review of Jane's work history with the University shows an individual who has worked in progressively responsible positions that have given her the opportunity to acquire higher levels of responsibility. Lastly, from her answers during the interview and from the references provided, Ms. Smith has demonstrated excellent interpersonal skills, initiative, and good judgment. She was well prepared for the interview, gave thoughtful responses to the questions, and showed a keen interest in the position.

Completing HIRING PROPOSAL

Step 6:

Fill in the following information under the Position Budget Information Tab:

- Budget Summary Information
  - Please be sure the following information is correct
    - Fund Code
    - Account Code
    - Amount *(This amount should now match the "Actual Starting Salary")*
    - Percentage Funded:
    - **Be sure to save any changes then go to Hiring Proposal Documents.**

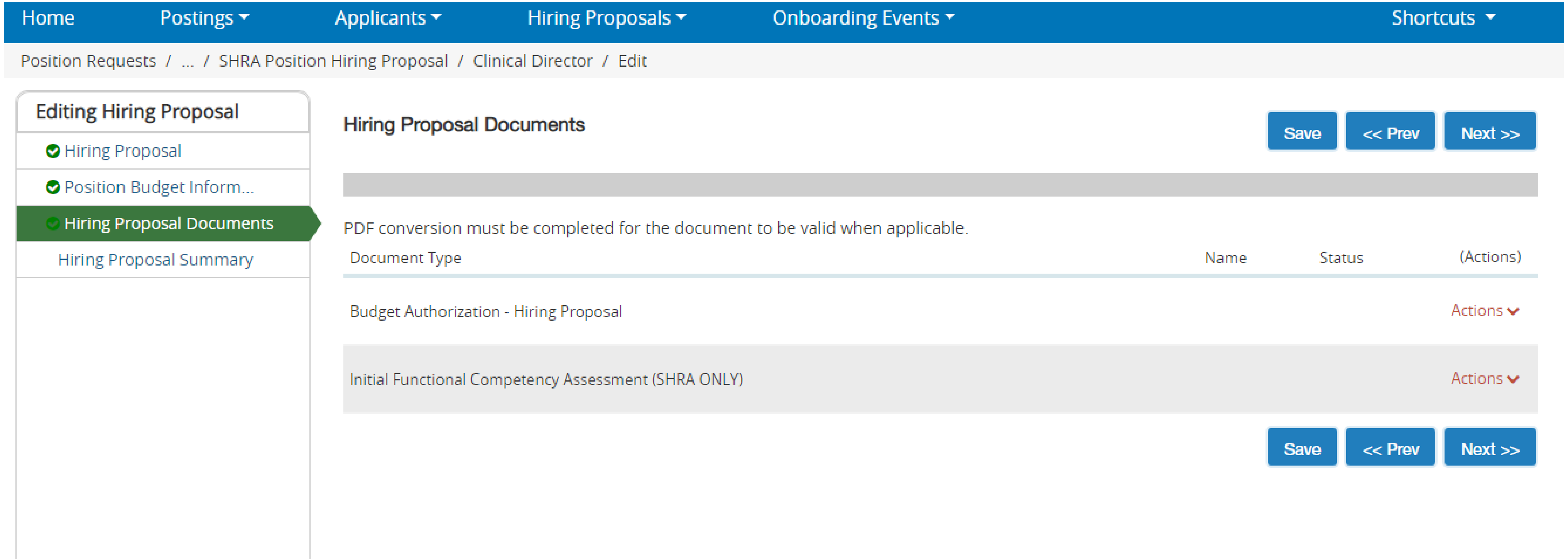


Completing HIRING PROPOSAL

Step 7:

Fill in the following information under the Hiring Proposal Documents Tab:

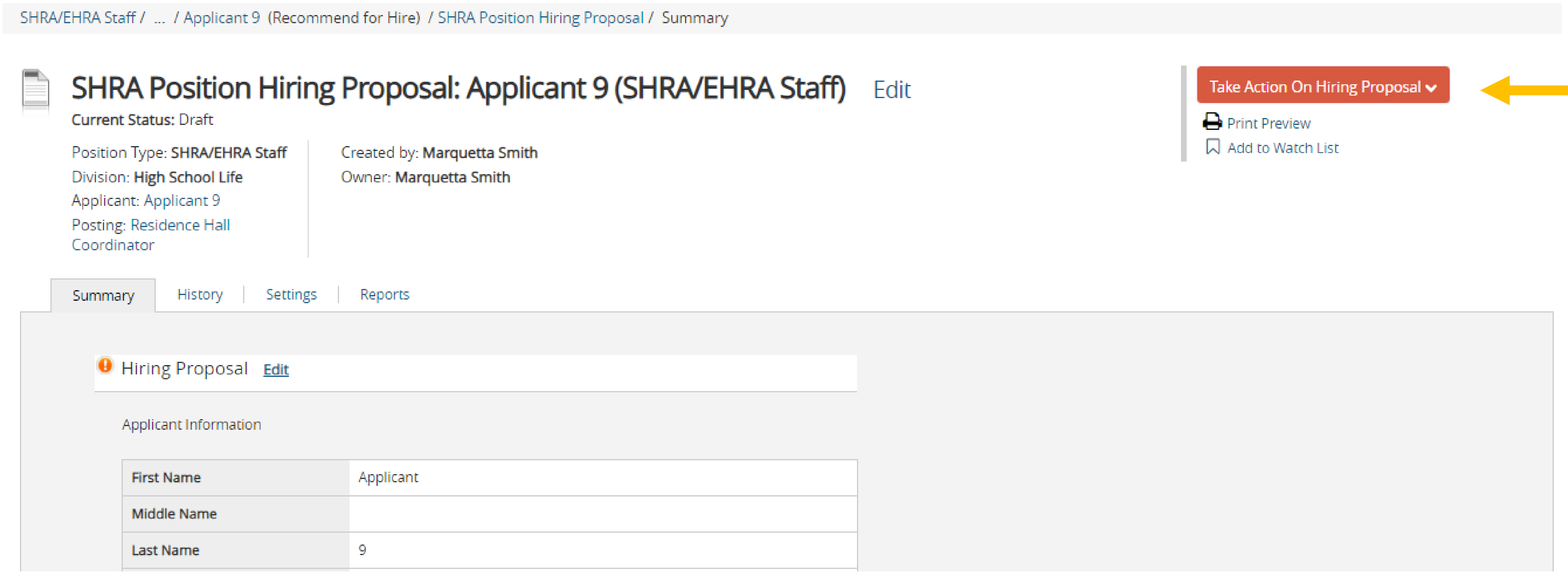
- Initial Functional Competency Assessment – **SHRA POSITIONS ONLY**
  - Please complete the form prior to routing in the system.
  - YOU ARE NOT REQUIRED TO SUBMIT ANYTHING FOR BUDGET AUTHORIZATION.
  - *Save changes and continue to Hiring Proposal Summary.*



Completing HIRING PROPOSAL

Step 8:

- Review the summary page for the Hiring Proposal and route.
  - Click on the orange "**Take Action on Hiring Proposal**" to route.
- The routing workflow for Hiring Proposals is the same depending on which position type you are routing:



Completing the Hiring Proposal

- **Once the HP comes to HR for Final Review, we will make sure:**
  - All applicants have been deselected
  - Confirm start and orientation date (if needed) for employee
  - Approve HP
  - Email supervisor and applicant the signed offer letter from HR or Provost Office.
  - Send the applicant their checklist to ONBOARD!

ANY QUESTIONS?

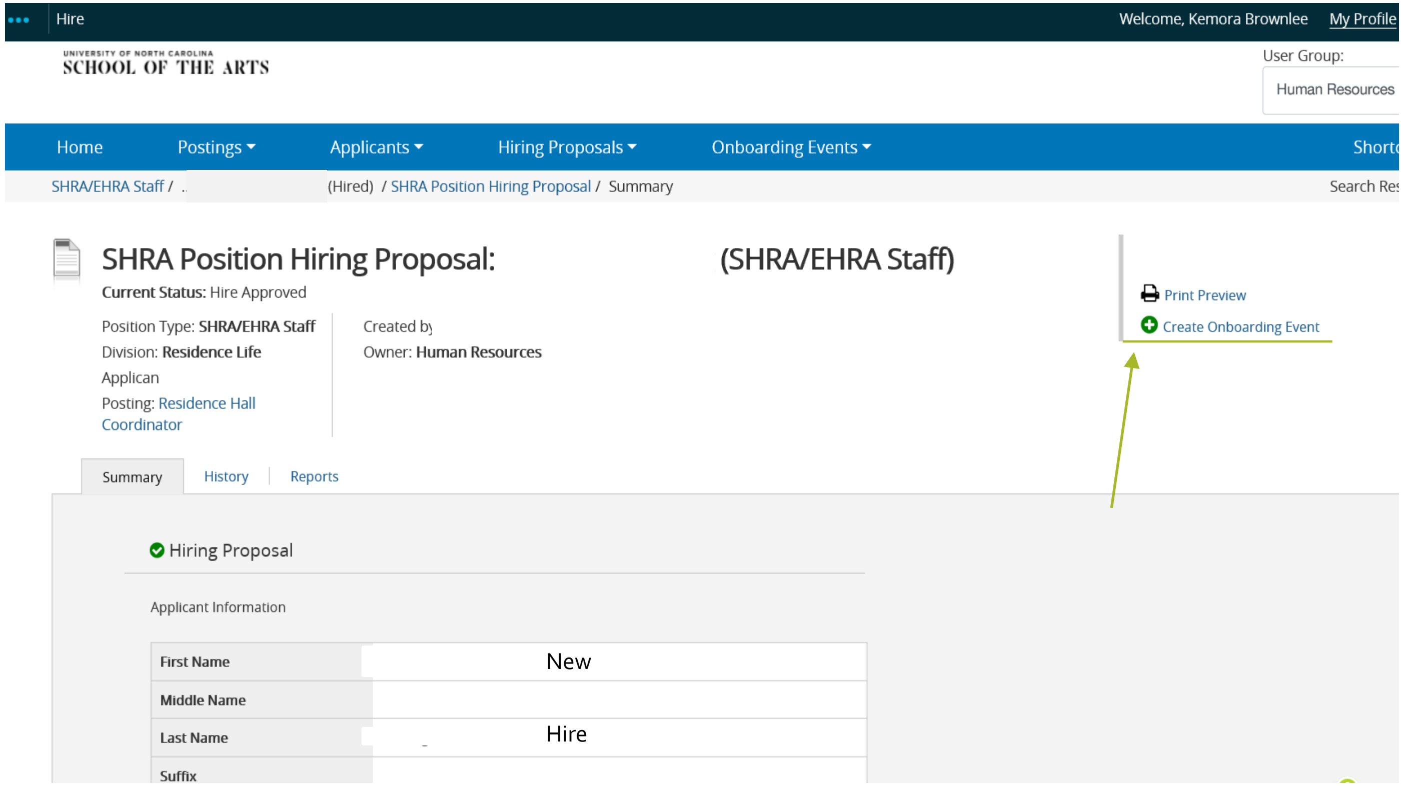
ONBOARD

You need to be located in the ONBOARD module

Create/update Onboarding Tab

Once the Hiring Proposal is verified by HR, HR will create the Onboard event for the New Hire.

- The New Hire account is automatically created on the Onboard site.



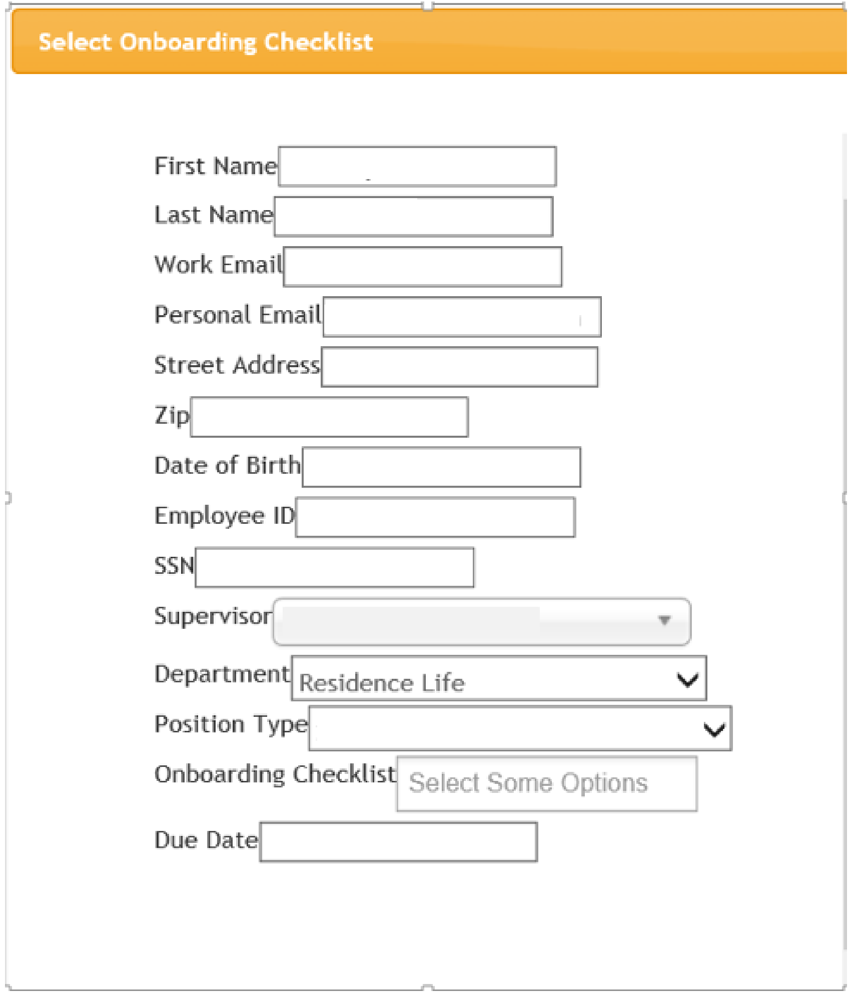
Creating account and checklist

The account information is imported from PA7 – all information will prepopulate into the Hiring Forms.

Checklist types

- SHRA/EHRA Staff
- M/Y Faculty
- Visiting Faculty
- Temporary Hires
- Student Hires

Due Date will always be the day prior to Orientation but forms can be completed and submitted at any time.



Notification Emails

Emails will be sent to New Hire with the event creation and changes in status.

HR can also send emails if:

- New Hire needs reminder
- Items still require signature/approval

UNCSA Human Resources Onboarding account information - North Carolina School of the Arts

UNIVERSITY OF NORTH CAROLINA
SCHOOL OF THE ARTS

Welcome

We are excited to have you join our campus community.

Before you start at UNCSA, please use our online records management system to easily complete most of your new hire documentation. You have been assigned documents on the SHRA/EHRA New Hires task list. Please complete the assigned documents as soon as you are able to prevent any delays in processing. Keep in mind that you will need to bring your I-9 identity verification documents to the Human Resources office during your scheduled orientation.

To log in to the system please follow the link at the bottom of this message. Your username is . When you attempt to log in for the first time please click the "**Logging in for the first time?**" link at the bottom of the login page to reset your password.

Questions? You can reach Human Resources at 336-770-1428 or hr@uncsa.edu.

We look forward to you joining our team.

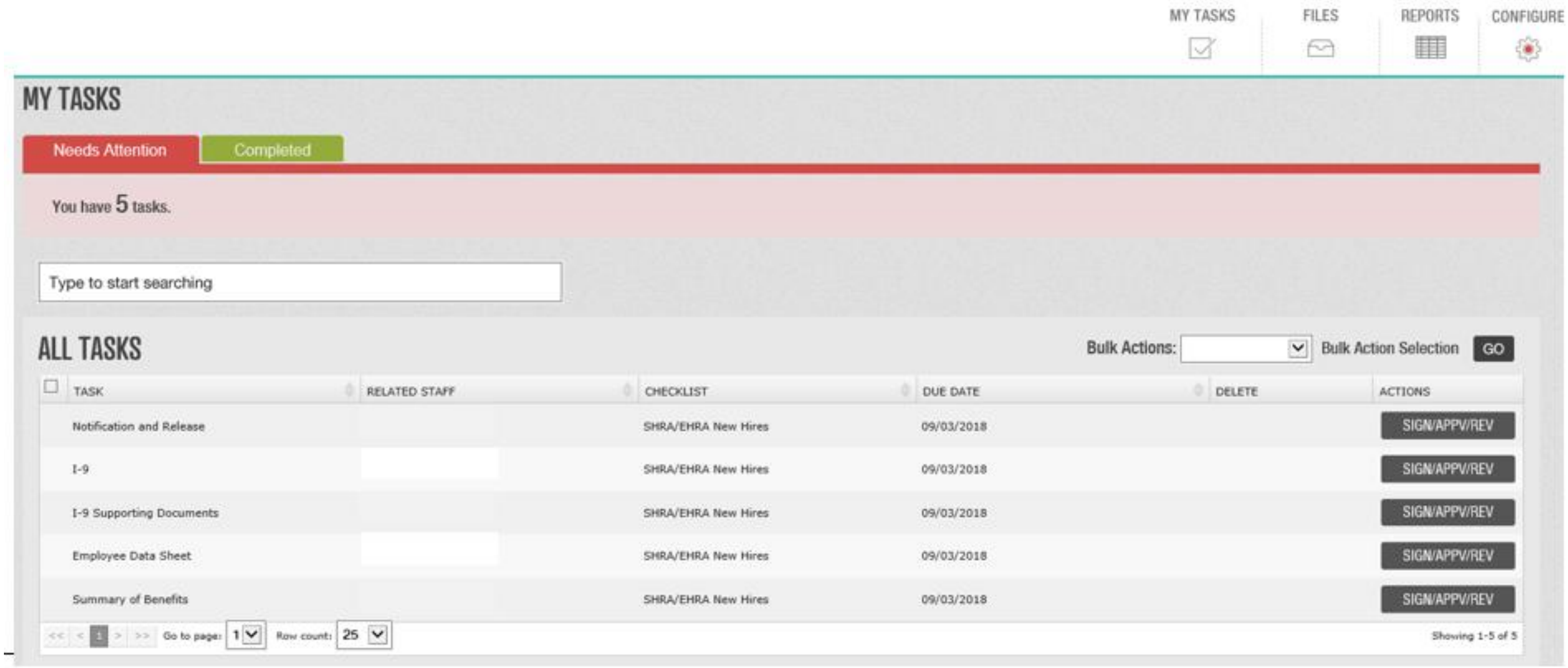
Best,

UNCSA Human Resources

Log In

This will link the new hire to onboard site

Needs Attention: actions to be completed



Needs Attention: actions to be completed

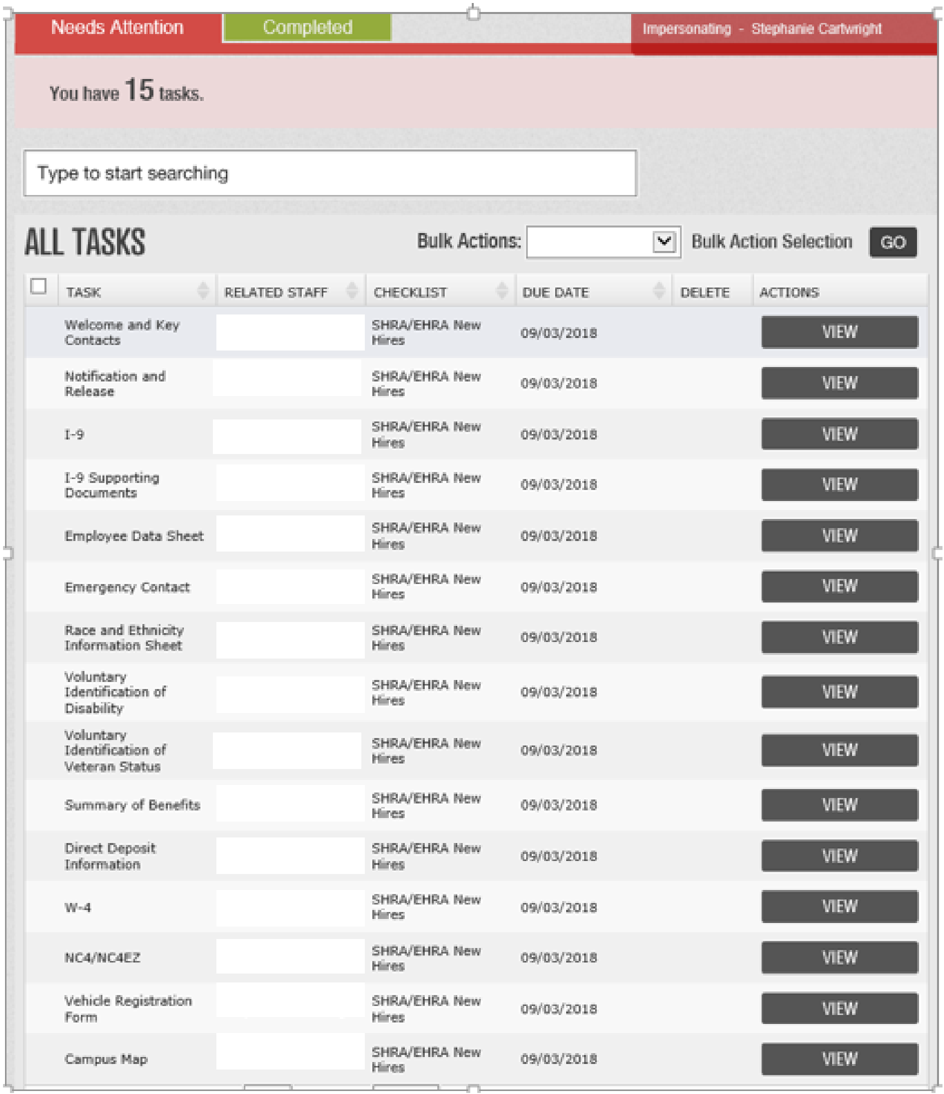
As documents are completed they route to the applicable departments/staff members for review or signatures:

SHRA/EHRA/Temp forms : Human Resources

Faculty forms : Faculty Affairs/Human Resources

Direct Deposit/Tax Form: Payroll

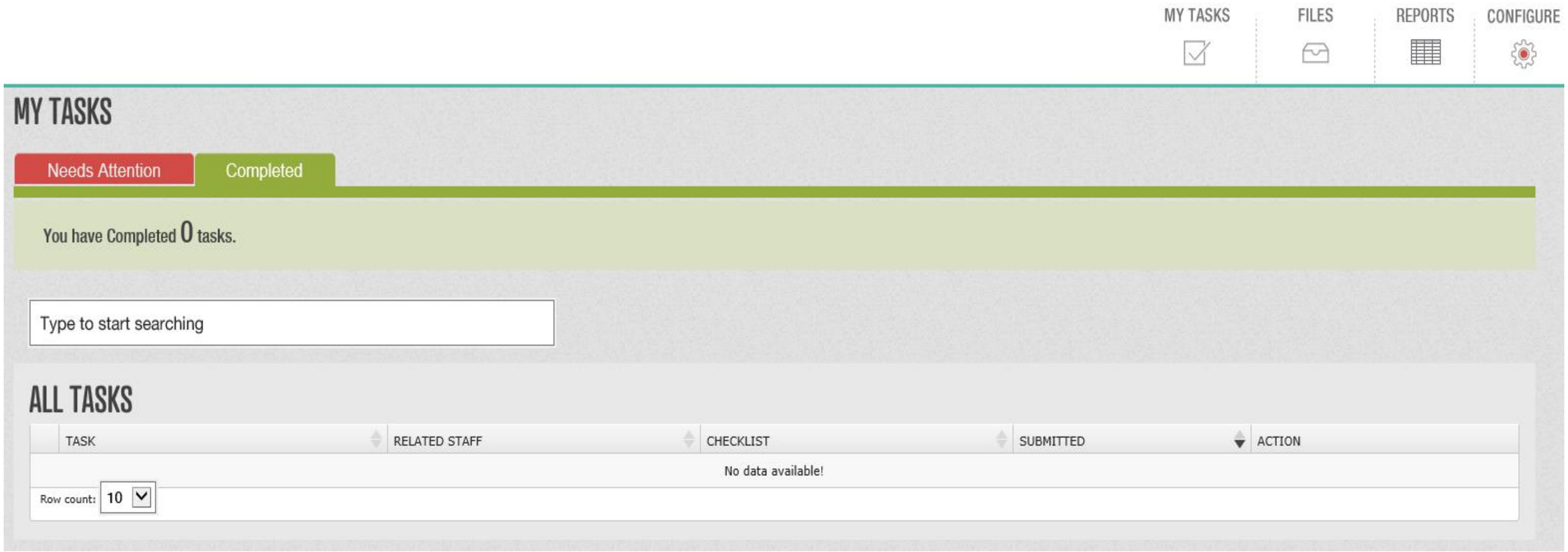
Vehicle forms : Department/Campus Police



TASK	RELATED STAFF	CHECKLIST	DUE DATE	DELETE	ACTIONS
Welcome and Key Contacts		SHRA/EHRA New Hires	09/03/2018		VIEW
Notification and Release		SHRA/EHRA New Hires	09/03/2018		VIEW
I-9		SHRA/EHRA New Hires	09/03/2018		VIEW
I-9 Supporting Documents		SHRA/EHRA New Hires	09/03/2018		VIEW
Employee Data Sheet		SHRA/EHRA New Hires	09/03/2018		VIEW
Emergency Contact		SHRA/EHRA New Hires	09/03/2018		VIEW
Race and Ethnicity Information Sheet		SHRA/EHRA New Hires	09/03/2018		VIEW
Voluntary Identification of Disability		SHRA/EHRA New Hires	09/03/2018		VIEW
Voluntary Identification of Veteran Status		SHRA/EHRA New Hires	09/03/2018		VIEW
Summary of Benefits		SHRA/EHRA New Hires	09/03/2018		VIEW
Direct Deposit Information		SHRA/EHRA New Hires	09/03/2018		VIEW
W-4		SHRA/EHRA New Hires	09/03/2018		VIEW
NC4/NC4EZ		SHRA/EHRA New Hires	09/03/2018		VIEW
Vehicle Registration Form		SHRA/EHRA New Hires	09/03/2018		VIEW
Campus Map		SHRA/EHRA New Hires	09/03/2018		VIEW

Completed Tasks

These items update from the Needs attention tab as they are signed or reviewed.



Available items through portal

Forms

- Direct Deposit (verification documents can be uploaded)
- Employee Data Sheet
- Tax forms (W-4, NC-4, NC-EZ)
- I-9 form (verification documents must be brought to orientation)
- Background Check

Links

- Vehicle Registration
- Benefits Video
- Campus Map

ANY QUESTIONS?