Initiate a Posting – Temporary (Hiring Manager)

TEMPORARY
PEOPLEADMIN ONLINE HIRING SYSTEM
UW-RIVER FALLS
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Introduction

PeopleAdmin is UWRF's online recruitment and applicant management system. Key process points managed within PeopleAdmin are below. Process attributes unique to the Temporary position type are noted in blue italics.

1. **Upfront** administrative approval to recruit and fill a position
   - A request to post a position will include an hourly rate and estimated hours to be worked
   - If the posting is approved by all administrators, it authorizes HR to make an offer to a qualified candidate (as long as the offer is within those previously approved parameters.)

2. Online job postings on UWRF’s job portal: [https://jobs.uwrf.edu](https://jobs.uwrf.edu) - 2 options for Temporary
   - **Public Posting** – When an opening needs to be made public to allow applicants to apply, it is posted on jobs.uwrf.edu
   - **Internal Posting** – when a specific candidate is in mind, upon the posting being approved, it can be internally posted, where only that candidate may apply.

3. Online collection of applications on [https://jobs.uwrf.edu](https://jobs.uwrf.edu)
   - If hiring from the pool, selected applications will be copied to your posting.

4. Applicant review and selection done within PeopleAdmin.

5. Once a candidate is selected by Hiring Manager, HR will complete the hiring process.

For more information on the Temporary process and step by step guides for each role, go to the Hiring Procedures section of the Human Resources web page at [https://www.uwrf.edu/HumanResources/Hiring.cfm](https://www.uwrf.edu/HumanResources/Hiring.cfm), login with your Falcon Account and click on Temporary.

Initiate a Posting

Contact Human Resources

Before initiating a posting, the Hiring Manager should contact Human Resources for an initial discussion regarding the position and to determine the appropriate title (including pay rate) and codes required for the posting. The Hiring Manager should be prepared to provide a position description for this initial discussion.

At this time you will also discuss and determine the recruitment/posting approach to be used for this posting:

   - **Public Posting** - Public recruitment/posting on [https://jobs.uwrf.edu](https://jobs.uwrf.edu)
   - **Internal Posting** - Individual already identified for the position

Regardless of the recruitment method, the Hiring Manager will be required to create a specific posting in order to obtain administrative approval and fill the position. Only the means of gathering applications will vary.

If this is the Hiring Manager’s first time utilizing PeopleAdmin to create a posting, please also ask HR about training in how to use the system, what is required to request to hire, and the workflow for Temporary hires.
Login to PeopleAdmin
After your meeting with Human Resources, you may log into PeopleAdmin to create the posting.

Login Page:  https://jobs.uwrf.edu/hr
User Name:  Falcon ID (w#)
Password:  Falcon account password

Check your Role
Upon logging in, ensure that your role is set to Hiring Manager, so you have the ability to create a posting and send it to the appropriate individuals for review. If needed, select Hiring Manager from the drop down.

Figure 1: Tabs available under Hiring Manager role & Changing Roles

Note: By default, Academic Department Chairs will not have the Hiring Manager role. Upon completion of the initial conversation with Human Resources, Hiring Manager access will be temporarily granted to you so you can create the posting.

Note: Even if you have the Dean/Director position, it is advised to create the posting using Hiring Manager. You will have one additional approval step, however, it will allow the posting to flow through the workflow properly.

Create Posting from Position Type
To initiate a new posting, click on the shortcut found on the right hand side of the Home page within PeopleAdmin. A popup window appears giving you two choices. Select Create from Position Type.

Figures 2a & 2b: Create New Temporary Posting and Create from Position Type

As you enter the data, please use title case. Do not use all capitals.
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Enter the Title provided by HR into the UW System Position Title field such as Communication Specialist. On the next screen, there is space for an optional Working Title. The Organizational Unit fields (Executive, Division/College, and Department) will default to values or options that reflect your position in the organizational structure. If you have options, select the appropriate values from the drop down list for the posting you are creating.

Figure 3: New Posting

**TIP:** If you need to exit the system before your posting is completed, ensure you have saved it before exiting. To return to your posting at a later time, you will need to select Postings, then Temporary. A list of current postings including your draft posting will appear and you may click on the name of the posting, and then Edit to continue.

**Editing Posting**

There are seven submenus associated with Editing a Posting. Not all are used for Temporary postings. Once all required fields on any given page have been populated and any updates needed made, click on the Next button to move to the next menu’s page. This saves the page you are on and moves you to the next submenu in the side menu. *If preferred, you also have the option to click Save then select any submenu item from the left hand menu.*

We recommend moving through all the pages one at a time until you become more familiar with the system and the requirements for each position type.

Figure 4: Editing Posting menu and page top

**Side Menu item descriptions**

Last updated: April 28, 2016
Menu Item | Descriptions
---|---
Posting Details | Contains fields which define the position being requested
Supplemental Questions | Discussion with HR will determine if the posting is appropriate for supplemental questions. Not applicable if you already have an applicant in mind
Applicant Documents | These are the documents each applicant will be required to (or optionally may) submit for review. *Resumes will be required for all Temporary postings*
Posting Documents | These are all the documents associated with the search process. *Position description is the only required posting document for Temporary*
Guest User | Not currently used for Temporary postings
Search Committee | Not currently used for Temporary postings
Ranking Criteria | Not currently used for Temporary postings
Summary | One page which displays a compilation of all the previous pages

Posting Details
This section follows the same format as the MS Word template for the Position Description (PD). If you have previously documented the PD using that format, data entry should be simple.

*NOTE:* Applicants will *not* see all of the fields in their view of the posting. At any time, you may go to the Summary at the bottom of the side menu and click on See how Posting looks to Applicant in order to gain a comfort level with what information will appear on the public job portal. To exit that view, click on the job title in the breadcrumbs at the top of the screen and then select Edit to continue entering posting data.

**Position Information Fields** (*Required Information*) *(Grayed out items Do Not Change/Use)*

<table>
<thead>
<tr>
<th>Field Names</th>
<th>Explanation / Examples</th>
</tr>
</thead>
<tbody>
<tr>
<td>*UW System Position Title</td>
<td>Carried over from previous page</td>
</tr>
<tr>
<td>Working Title</td>
<td>Optional</td>
</tr>
<tr>
<td>*Supervisor Name</td>
<td>Direct Supervisor (First and Last name)</td>
</tr>
<tr>
<td>*Appointment Type</td>
<td>Select applicable Temporary term</td>
</tr>
<tr>
<td>*FLSA Status</td>
<td>Default is ‘Non Exempt.’ Please do not change.</td>
</tr>
<tr>
<td>*Hour per Week</td>
<td>State number of hours</td>
</tr>
<tr>
<td>Typical Working Schedule</td>
<td>Optional Please state the regular work schedule for this position</td>
</tr>
<tr>
<td>*Position Summary</td>
<td>Copy and paste from Position Description</td>
</tr>
<tr>
<td>*Responsibilities</td>
<td>Copy and paste from Position Description</td>
</tr>
<tr>
<td>*Knowledge, Skills, and Abilities</td>
<td>Copy and paste from Position Description</td>
</tr>
<tr>
<td>*Position of Trust</td>
<td>Select Yes or No from dropdown. For more information see <a href="#">Administrative Policy AP-06-106</a></td>
</tr>
<tr>
<td>If Yes, Please Define</td>
<td>Check all boxes that apply in relation to Position of Trust</td>
</tr>
<tr>
<td>Salary range for this posting</td>
<td>Enter hourly rate provided by HR</td>
</tr>
<tr>
<td>Comment on why...</td>
<td>Open ended field – state position justification for seeking Temporary. This will be reviewed by Administration.</td>
</tr>
</tbody>
</table>
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Specific Recruitment Information

<table>
<thead>
<tr>
<th>*New position or replacement?</th>
<th>Select “New Position”, “Replacement-Same Duties” or “Replacement-New Duties” from dropdown</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name of previous incumbent</td>
<td>If applicable</td>
</tr>
<tr>
<td>*Target Start Date</td>
<td>Use calendar that appears to select date for appropriate formatting</td>
</tr>
<tr>
<td>Anticipated End Date</td>
<td>Use calendar that appears to select date for appropriate formatting.</td>
</tr>
<tr>
<td>(if applicable)</td>
<td></td>
</tr>
<tr>
<td>*Campus Phone #</td>
<td>Enter 10 digit phone number</td>
</tr>
<tr>
<td>Location (building)</td>
<td>Enter name of building</td>
</tr>
<tr>
<td>*Room #</td>
<td>Enter specific work room number</td>
</tr>
<tr>
<td>*Time/Absence Primary Approver</td>
<td>Direct Supervisor (First and Last name)</td>
</tr>
<tr>
<td>*Time/Absence Backup Approver</td>
<td>Backup Approver (First and Last name); cannot be same as the primary approver</td>
</tr>
<tr>
<td>Other Appt Details</td>
<td>Open ended field – for Administrator use only</td>
</tr>
</tbody>
</table>

Financial Information
For a posting to move forward, the funding distribution for the position is required. The distribution may be up to five accounts.

Click the Add Financial Information Entry button. You may need to scroll down to return to the Financial Information Section. Enter the Fund, Department, Program, Project (if applicable) and Distribution %.

If grant funded, please obtain approval from Cindy Yunker in Accounting prior to entering grant funding on the posting.

Repeat to add additional accounts as needed. Please ensure that your distribution totals to 100.

Salary Information (HR USE ONLY)
This area will be filled out by Human Resources.

Figures 5a & 5b: Providing Financial Information
Posting Detail Information
The only required field is the **Open Date**.

<table>
<thead>
<tr>
<th>Posting Number</th>
<th>Automatically generated by the PeopleAdmin system</th>
</tr>
</thead>
<tbody>
<tr>
<td>Search Chair</td>
<td>Usually Hiring Manger for Temporary postings</td>
</tr>
<tr>
<td>*Open Date</td>
<td>If you would like the posting to appear on the portal as soon as it is approved, enter the day you are creating the posting. If not, use the calendar to select date on which you would like the posting to appear to the public.</td>
</tr>
<tr>
<td>Closing Date</td>
<td>Not used for this position type</td>
</tr>
<tr>
<td>Open until Filled</td>
<td>Check box if posting is “Open until Filled”</td>
</tr>
<tr>
<td>Special Instructions to Applicants</td>
<td>To be completed by HR</td>
</tr>
<tr>
<td>Quick Link for Internal Postings</td>
<td>Available to share to applicants if posting is NOT to be advertised via web (visible after approval/review process complete)</td>
</tr>
<tr>
<td>Pass Message</td>
<td>Do not edit – please leave default message</td>
</tr>
<tr>
<td>Fail Message</td>
<td>Do not edit – please leave default message</td>
</tr>
</tbody>
</table>

Once you have completed this section, click on **Next** to proceed to **Supplemental Questions** (or, if desired, you may click on **Save** and use the left menu to click directly to **Supplemental Questions**).

Figure 6: Click on Next to proceed to next menu

**Supplemental Questions**
If there are specific questions each applicant should answer as they are applying for the position, you can enter the questions here. HR will need to approve the questions before they can be included in the posting. Please discuss with HR before setting any question’s possible answer as **‘Disqualifying.’**
Clicking Add a question presents you with a list of HR approved questions to add to the posting or allows you to create a question for this posting by clicking Add a new one found at the bottom right hand side.

**Adding preapproved Available Supplemental Questions**

Once a question has been added, clicking on the question expands the Possible Answers: Predefined Options. This area allows you to establish weighting points for each possible answer and/or allows you to select a disqualifying response. Checking the box under Required will force each applicant to respond to the question otherwise, they are allowed to skip answering the questions. Please discuss with HR before setting any question’s possible answer as Disqualifying.

**Creating Supplemental Questions within a posting**

If you did not find an existing question that you would like to use, click on Add a new one found in the bottom right. Enter the Name, Category, Question and predefined answers if needed. Click on Submit when finished. HR will need to approve this question before the posting can be posted.
Once you have completed this section, click on Next to proceed to Applicant Documents (or, if desired, you may click on Save and use the left menu to click directly to Applicant Documents).

Applicant Documents
A list of all possible applicant documents is provided. Each document type needs to be listed as either Required, Optional or Not Used for the application process. If ‘Not Used’ is selected, the applicant will not have the option to include that document. Update the radio buttons to reflect your choices. To change the order of the documents, the screen utilizes “Drag & Drop.”
Once you have completed this section, click on **Next** to proceed to **Posting Documents** (or, if desired, you may **Save** and use the left menu to click directly to **Posting Documents**).

**Figure 15:** Click on Next to proceed to next menu

**Posting Documents**

Attach the **Position Description** that you already prepared. Other document types listed are not required for Temporary.

**Figure 16:** Posting Documents attachment area
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Once you have completed this section, click on **Save**, then use the left menu to click directly to **Summary**. You will not typically use Guest User, Search Committee and Ranking Criteria menus for a Temporary posting.

**Summary**
A summary of your posting will appear. Scroll down to review for completeness and accuracy. If you need to modify any sections, click on the **Edit** found at the top or by each section name. Once satisfied, click on **Save**.

![Figure 17: Posting Summary](image)

If you haven’t already, you should click on **See how Posting looks to Applicant** in order to gain a comfort level with what information will appear on the public job portal. To exit that view, click on the job title in the breadcrumbs at the top of the screen and then select **Edit** to proceed.

![Figure 18a and 18b: Accessing See how Posting looks to Applicant and exiting the applicant view](image)

Once satisfied, you are ready to send the posting for approval.

**Kicking Off the Approval Process**

Send to Dean / Director (move to Dean / Director)
To move the posting forward in the approval process, click on the orange **Take Action on this Posting** button and select **Send to Dean/Director (move to Dean/Director)**. If you would prefer to wait and come back to the posting later, you may select **Keep working on this posting**.

![Figure 19: Take Action on Posting – Send to Dean / Director](image)
NOTE: If your organization has more than one Dean/Director (example: Student Affairs), always send to the lower level Dean/Director first. That individual will have the option to send to the higher level Dean/Director once their review is complete.

NOTE: If you are also the Dean/Director for your organization, send it to yourself using the instructions below. Upon the posting being transitioned, you will need to switch roles to Dean/Director, locate the posting in your Inbox, and then Take Action on this posting to Send to Budget. It is an extra step, however helps avoid the workflow issues that can occur when skipping a step.

Figure 20: Making comments when taking action

Add any comments in the box, check the box to add to your watchlist for ease of locating the posting in the future. Comments will be included in the email send to the Dean/Director and will be added to the posting within PeopleAdmin.

Once you click on Submit, you will lose editing access to the posting information, likely until applicants have been reviewed and one has been recommended for hire. Editing access is passed along with control of the posting to the next person in the process.

Should the need arise, the posting for a search in progress can still be cancelled at any time by contacting Human Resources

Ensure Move in Workflow was successful
Once you have taken action on the posting, check the top of your screen for a green bar and transition message

Figures 21a and 21b: successful transition and failed transition message bars

If a red bar appears, review the message to understand what was missing (Posting will not move forward if any required information is missing.) Return to that section of the posting, click on Edit, and enter/modify the required information. Save the page, return to the Summary, and again Take Action on this Posting to move to the next step in the workflow.

Congratulations! You have completed a posting / request to hire for a Temporary position!
After Submitting a Posting Request to the Approval Process

- The Posting will go through an approval workflow based on the organizational hierarchy of the department the posting is in:
  - Dean/Director
  - Budget Office (reviews all posting requests)
  - Chancellor/Provost
- If approved by all, the posting is sent to HR for review. If needed, HR will move the posting to the Hiring Manager to complete details. Once details are completed, move the posting in workflow to HR for Final Review by clicking on ‘Take Action on Posting’ and selecting ‘Send to HR for Final Review.’
- At this point, next steps depend on the type of recruitment/posting approach you are using:
  
  A. If Public Posting – HR updates the posting status to “Posted” so outside applicants can view the posting on jobs.uwrf.edu and apply online. Proceed to Applicant Review Process to learn how to view applications that have been submitted.

  B. If Internal Posting – HR updates the posting status to ‘Approved for Internal’ and the Hiring Manager sends the Quick Link to a specific individual to invite them to apply by copying/pasting quick link web address into email. Upon the applicant applying, you may proceed to the Applicant Review Process.

Figure 22: Quick Link to an internal posting

Applicant Review Process

Access Posting

Once application(s) are available for your review, using the top Postings dropdown menu, select Temporary. This will display all Temporary postings to which you currently have access.

Access Applicants’ Materials

Verify you have selected the correct posting then to access the list of applicants, click on the Applicants tab.
Your next steps depend on the recruitment/posting type you are viewing.

A. If **Public Posting** – If the posting you created included supplemental questions, please see below, otherwise, proceed to the **Review Individual Application(s)** section of this document.

B. If **Internal Posting**, you likely did not use supplemental questions, so please proceed to **Review Individual Application(s)** section of this document.

### Review Summary Supplemental Question Responses

To quickly review all applicants responses to any Supplemental Questions click on the ‘**Actions**’ button found on the upper right side of the list of applicants and select **Review Screening Question Answers**.

All Supplemental Questions and an associated graph of responses is displayed. Click on a link next to **Chosen by** to display all applicants that chose that response. The **Supplemental Score** displayed for each applicant is calculated based on the **Points** assigned for each response for each question. If you have questions regarding this value, please contact HR.
Review Individual Application(s)

To review each Applicant’s information, either click on the Applicant’s name or using the Actions dropdown, select View Application. Even if you had one individual apply via a quick link, it is advised to view the application.

A Summary page appears with the Applicant’s information displayed. The Applicant’s attached documents are listed at the bottom. See Fig 23.

- Each document may be viewed individually by clicking on the title of the document (1).
Alternately, all documents may be processed into one large pdf for viewing by clicking on “Application and attached documents” link found at the very bottom (2). This opens a new pdf reader window.

Do NOT use the “Recreate PDF” links found on the lower right side. This also gives you a pdf but it is a very slow load process.
Select Applicants for Interview

Your next step will depend on your recruitment/posting type.

A. If Public Posting – Continue to Interview and Selection section of this document
B. If Internal Posting – Skip Interview and Selection and continue to Maintaining Applicants’ Status section of this document.

Interview and Selection

For the remainder of the process, you will be working as Hiring Manager within the posting you created. If you plan to interview and select from those that applied to your public posting, you will track and update each applicant’s status within PeopleAdmin as you move through the following process.

- Conduct Interviews
  - Upon completing phone interviews (if applicable), update all applicants’ statuses to either ‘Selected for On-Campus Interview’ or ‘Interviewed, Not Hired’
  - Upon completing On-campus interviews, update all applicants’ statuses to either ‘Reference Check’ or ‘Interviewed, Not Hired’
- Conduct reference checks (optional)
- After determining which applicant you would like to hire:
  - Finalize all other applicants’ status to either ‘Reference Check’ (this indicates an alternate finalist) or ‘Interviewed, Not Hired’
  - The applicant selected for hire should be set to the ‘Recommended for Hire’ status.
- If the search fails, then a conversation with HR as to next steps is necessary

Maintaining Applicants’ Status

To change the status of applicants, from the Applicants tab, using the checkboxes on the left had side, check those applicants you wish to update the status for. Using the Actions dropdown, select Move in Workflow.

![Figure 28: Select applicants to change status](image-url)


**Recommend Candidate for Hire**

*Recommend for Hire* status on a specific candidate will prompt HR to generate an offer letter and background check, and then to complete the rest of the hiring process.

**Prepare for New Hire’s Arrival**

To prepare for the new employee’s arrival, use the [New Employee Orientation Checklist](#) found on Human Resources New Employee Onboarding web page.