Operations Guide-Ad Hoc

DEAN’S ASSISTANTS AND HR USERS
PEOPLEADMIN ONLINE HIRING SYSTEM
UW RIVER FALLS
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Introduction

PeopleAdmin is UWRF’s online recruitment and applicant management system. This document focuses on unique processes and set ups related to the Ad Hoc position type. The users most likely to benefit from this document include Human Resources staff, Deans Assistants and the Outreach Financial Specialist.

Key process points for Ad Hoc – Continuous Recruitment managed within PeopleAdmin include:

1. Online continuous recruitment job postings for each college/discipline on https://jobs.uwrf.edu
2. Online collection of applications and associated materials
3. Pool applicant review conducted by Department Chair (using the Search Chair role) and / or Designee (using the Search Committee Member role)
4. Approval managed by the Department Chair (using the Search Chair role)
5. Department Chair initiates a “Request to Hire Ad Hoc” (Form is found on the HR web site either in ‘Forms’ or ‘Hiring Procedures’ section)
6. Dean Assistant reviews the hiring information with the Dean and creates a specific posting for each Ad Hoc position (using Dean/Director role) – or - Outreach Hiring Manager creates specific posting using Hiring Manager role and forwards to Dean/Director role (Financial Specialist) for approval.
7. Creation of an electronic ‘Hiring Proposal’ for the selected candidate, which combines posting data, applicant data, and job offer data (by Dean Assistant or Outreach Financial Specialist in Dean/Director role)
8. Initiation of offer letters and onboarding activities (by Human Resources)

For more information on process and roles, see associated PeopleAdmin process flow documents and Ad Hoc training documents (available on the HR website under Hiring Procedures).

Ad Hoc Process Flow Documents available on the Hiring Procedures page include:

- Building and Maintaining a Pool of Qualified Applicants
- Filling a Specific Position (Initiated by the College)
- Filling a Specific Position (Initiated by Outreach)
PeopleAdmin Online Recruitment System
Ad Hoc / Instructional Academic Staff
Continuous Recruitment

PeopleAdmin User Interface Overview

Login to PeopleAdmin

Login Page:  https://jobs.uwrf.edu/hr

User Name:  First initial and Last name  Example: Jane Smith is JSmith

Password:  Initial login will use the user name as the password. Upon initial login, each user is required to reset their password.

Figure 1: Login Screen

Check your Role

HR Staff will default to the Human Resources role.

Dean Assistants & Outreach Financial Specialist: Your default role should be set to Dean/Director. Rarely should you need to change roles, but if you do, select the desired role and click on the (refresh icon) to the right.

Figure 2: Changing a role and refreshing
PeopleAdmin Online Recruitment System

Ad Hoc / Instructional Academic Staff
Continuous Recruitment

Fall and Spring Semester Hiring – Create & Fill a Specific Posting
The most frequent activity in Ad Hoc will be filling a specific position from the pool, which includes the following steps.

**Ad Hoc Hire Initiated (Dept Chair/Outreach PM)**
- Identify Need
  - Department Chair or Outreach Program Manager identifies the need, selects applicant from pool and extends contingent offer
    - Department Chair may fill out the ‘Request to Hire Ad Hoc’ form, to communicate the hire to the Dean Assistant. The form also includes Course Assignments or PD depending on the type of position.

**Specific Posting Created (Dean Assistant / Outreach PM)**
- Create Specific Posting
  - Deans Assistant or Outreach Program Manager create a specific posting from a template and sends to HR (See separate training docs for Specific Postings & Hiring Proposal)
  - NOTE: A single posting may be filled by multiple applicants as long as the following are the same for each individual:
    - Title
    - Start and End Dates
    - Term
    - Funding string and % distribution
  - Note: a separate hiring proposal must be generated for each individual.

**Internally Post the position (Human Resources)**
- Click on **Edit**: Review the posting and verify or add the following:
  - Pay Basis
  - Classification Code
  - Salary Grade (if applicable)
  - Minimum Salary
  - Ensure funding specifics match the hire specifics (i.e. term vs full year)
- Internally post - HR clicks on **Take Action on Posting** and selects **Approve for Internal**.

**Copy Pool Applicant to Posting (Dean Assistant/Outreach PM)**
- The Deans Assistant or Outreach Program Manager will monitor their watchlist to see the status change. Deans Assistants connect the specific posting to the pool posting, then copy the applicant and initiate the Hiring Proposal (details in separate training docs for Specific Postings & Hiring Proposal)

**Hiring Proposal Approval (Administrators)**
- The Hiring Proposal goes through administrative approvals – Dean Director > Budget > Provost and then is sent to Human Resources.

**Complete Hiring & Onboarding (Human Resources)**
- Upon the Hiring Proposal being approved, HR initiates the background check (if needed)
Once the Background Check has been passed (or if it’s not needed), HR then generates the contract letter (Course Assignments printed and included for college hires; included in the body of the letter for Outreach Hires). Use ‘reports’ to generate a standard letter:

- Locate and go into the Hiring Proposal
- Go to Reports tab
- Select the appropriate letter template

The letter (report) will populate with information from the Posting and Hiring Proposal

- Select all (Ctrl + A), copy (Ctrl +C) open Word and paste into blank document
- Add Date and Salutation if necessary. All fields in [CAPS AND BRACKETS] should be reviewed and edited as needed. May need to change margins, numbers to text, font size, etc. as required by the Chancellor’s Office. Ensure Course Assignment information is either added to the letter (Outreach hires) or printed and included as an attachment (posting document for College hires).
- Print on letterhead, obtain signatures and mail to applicant.
- Take Action on Hiring Proposal and update status to Contract/Letter Issued
- Applicant returns documentation to Human Resources and Background Check returned from Verifications Inc. (if needed)
- Take Action on Hiring Proposal and change status to ‘Offer Letter and Background Check Complete’
- Enter the person / job into HRS
- Initiate onboarding activities (usually just new hire paperwork if a new employee)
- In PeopleAdmin:
  - In the Hiring Proposal, Take action on Hiring Proposal and change status to ‘Hiring Proposal Complete’
  - On the Applicant – ensure status is Hired
  - On the Posting – ensure status is Filled (unless there are multiple hires to be made off of the one posting)
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Summer and JTerm Hiring (Limited use of PeopleAdmin)
PeopleAdmin plays a very minor supporting role in the Summer and JTerm hiring process, since most individuals hired for summer session or summer service are current employees being hired to perform additional work on a lump sum basis. In an average year, there are approximately ten new hires for summer and zero for JTerm. **Faculty do not need to apply to the continuous recruitment pool. Only NEW employees who have not previously worked for UWRF need to apply to the continuous recruitment pool for the department in which they desire to teach. Either the form will need to be expedited or HR will need to be contacted regarding these NEW HIRES in order to initiate and complete hiring activities prior to the first payment date.**

A PeopleAdmin specific posting and Hiring Proposal will NOT be generated for any Summer or JTerm hires. **A high level overview of the process is as follows:**

**Hire initiated (Department Chair / Outreach Program Manager)**
- a. Identifies need to hire
- b. Determines who they would like to teach the class and confirms details with the individual
- c. If the individual is a NEW HIRE, ensures individual has applied to the department continuous recruitment posting and has been ‘Approved for Pool’.
- d. Notifies Deans Assistant of hiring/appointment details

**Update database & initiate form for approval (Dean Assistant / Outreach Program Manager)**
- e. Updates the Summer JTerm Database (Dean Assts only) and initiates a SUMMER/JTERM APPOINTMENT FORM. **If the individual is a NEW HIRE, indicates on the form that the individual is a NEW HIRE and the department pool the individual is in.**
- f. Routes form for administrator approvals (Department Chair, Home Dean, Hiring Dean, Accounting, Budget, Chancellor/Provost, Human Resources)

**Complete the Hiring & Onboarding (Human Resources)**
- g. Reviews the form and determines next steps.
  - i. Current faculty & ad hoc instructors already in HRS - Update or add the appropriate summer service or summer session job record
  - ii. New Hire:
    1. Log in to department continuous recruitment pool in PeopleAdmin
    2. Ensure the individual is in the pool and has a status of ‘Approved for Pool”
    3. Print the application
    4. Using information from the application and SUMMER/JTERM APPOINTMENT FORM, enter the person and job data into HRS.
    5. Issue contract letter, generate background check and initiate onboarding activities with the new hire.

**Calculate Final Pay (Dean Assistant/Outreach Program Manager)**
- h. Upon enrollments being finalized, per Faculty Senate policy, calculate final pay, update and sign the bottom ‘Authorization to Pay’ section of the SUMMER/JTERM APPOINTMENT FORM and submits to Human Resources.
Enter Lump Sum Payment (Human Resources)
Human Resources enters lump sum payments into HRS. Payment to the employee is initiated per the terms noted on the form.

Searches and Extracts
PeopleAdmin provides the ability to modify Search results and to extract those results to Excel. *PeopleAdmin indicates that the reporting will be improved significantly sometime in Fall 2014. Currently the fields and filters available are fairly limited.*

Mozilla FireFox is the recommended browser.

Human Resources can share saved searches by tagging them as global or group saved searches. Non-HR users can only save personal searches.

Modifying a Search
Start by going to the Postings or Hiring Proposal tab for Ad Hoc position type.

![Figure 5: Modifying a Search](image)

All Hiring proposals (or Postings, depending on your selection) that you have security to see will be displayed. To modify the columns on the Search, click on More search options.

![Figure 6: Modifying a search](image)

Select the desired field name that you would like to add to the search results. Continue selecting fields from the drop down list until all that are needed have been added.

![Figure 7: Modifying a search - Adding a column](image)

To change the order of the columns, hover next to the column name and click on the right arrow or left arrow to move over one space. Click multiple times as needed. If needed, click on the X to remove the column from the search.
Save a Search

Once you the columns are arranged as desired, click on Save this search.

Additional fields will appear, where you may name the search and/or elect to make it your default search (this is your only opportunity to set it as default). Upon updating those fields as desired, click on Save this Search.

Next time you log in, if you did not make your search default, but want to access it, click on Open Saved Search and then select the desired search from the list. NOTE: Use FireFox as your browser to eliminate the issue of the list getting cut off on the left margin.

Should there be a need to create a new search, click on the Search button to initiate a new search and repeat the steps above as needed to customize. Each Search will be shown as a separate tab.
Exporting Search Results
To export to Excel, click on the Actions button and select Export Results.

Select Open or Save as desired, and work with the file in Excel as needed.

Close or Delete a Search
Click on the x on the tab to close the search.
Click on the x next to the saved Search’s name to delete a saved search.

Pool Postings
Background
In order to have a clean applicant view on https://jobs.uwrf.edu, under the Ad Hoc position type, there are four public job postings (one for each college). Each has a title of Instructional Academic Staff-Continuous Recruitment. These college level postings are in a status of Posted.
Figure 17: Applicant view of Ad Hoc pool postings (One for each college)

Within each college, the Position Summary field (see below) lists each department pool and has a hyperlink to the department or discipline pool posting which is in a status of Approve for Internal. Applicants apply to these department pool postings. If an applicant would like to be considered in more than one pool, separate applications can be submitted to each.

Figure 18: Hyperlinks to department/discipline postings found within College posting

**Edit existing Pool Posting**

Existing postings that are in a status of Approve for Internal may only be modified by Human Resources. While HR could move the posting back to Dean/Director, let the Dean Assistant make the changes and return to HR for Approve for Internal, it is recommended that (unless the changes are extensive) Dean Assistants notify Human Resources of changes needed and HR change them directly.
Update Academic Department Access to Posting (Human Resources)

One of the most frequent changes needed will be modifications to academic department access to the posting (See below for more details). Whenever this is needed, the Dean Assistant must contact Human Resources who will update the department or discipline pool posting.

**NOTE: Outreach Program Managers also have access to review and select applicants that have been approved for pool, however they do this using a shared ‘dummy account’ (Username: ContinuingEd Instruction). All Program Managers will use that shared account to view pools. Contact Outreach Financial Specialist or another Outreach Program Manager for password.**

Human Resources would do the following to edit an existing Continuous Recruitment Posting:

- Locate the department or discipline posting
- Click on **Edit**

![Posting: Instructional Academic Staff-Continuous Recruitment (Ad Hoc) Edit](image)

**Figure 19: Edit a posting**

- Make the change(s) required *(For Academic Department access, see role-based info below)*
  - **Department Chair** – Within Posting Details submenu:
    - Update **Supervisor Name** (informational only)
    - Update **Search Chair** (gives the individual access to approve/deny pool applicants)
    - You may want to take note as to if the outgoing department chair needs to be added as Search Committee Member.
  - **Other Pool Reviewers** (Faculty, Deans Associate Deans, Support Staff to view pool applicants and provide feedback to Department Chair) – Within Search Committee submenu:
    - Search to add new Search Committee Member
    - If a reviewer needs to be removed, next to his/her name, click on **Actions** and select **Remove from Posting**
  - **Outreach Program Managers** - As noted above, Outreach staff are **not** listed individually as Search Committee members, in order to avoid having to update each posting every time there is turnover in those Outreach roles. Instead, a ‘dummy account’ for ContinuingEd Instruction has been given access on every department posting, and all Project Managers will use that shared account to view pools. Outreach staff maintain that password.

- Click on **Save**
- You may get a warning message indicating that the changes are not yet visible to the applicant, but that is ok. The applicant doesn’t see these fields anyway. As long as the status remains ‘Approve for Internal’, the posting is where it should be.
Pool Posting – Major Edits or Create New

Introduction
Creating a Department or Discipline Pool posting should be rare. Creating a College-level Pool posting would be even more unusual.

Major Edits to Discipline Pool posting
If modifications are needed to an existing posting, the Deans Assistant will have to contact Human Resources to regain access to the posting. (HR will Take Action on Posting > Move Directly to Dean/Director, then select the Dean Assistant name from the drop down list and click on Submit)

Create new Discipline Pool posting (Dean Assistant)
Attention Deans Assistants: Prior to initiating a new continuous recruitment posting, review an existing one so you can model the new one after it for consistency. Keep in mind that you may have unique supplemental questions and required applicant documents based on the department’s requirements.

To initiate a new Discipline Pool posting, click on the “Create New Ad Hoc Posting” shortcut (Figure 4a) found on the right hand side of the Home page.

A popup window appears giving you two choices. Select “Create from Template.”

You will see the list of available templates for your college. Select ‘Instructional Academic Staff-Continuous Recruitment.’

The template will open, look in the upper right corner and click on the green + to “Create Posting from this Template”

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From here, model all of your data entry after the example continuous recruitment posting that you selected. It is important that all continuous recruitment postings are as consistent as possible.

Once all required fields on any given page have been populated you may 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 item in the side menu. You may also click “Save” then select a menu item from the left hand menu.

If you have not previously create a posting, see separate training document (Ad Hoc Specific Posting / Hiring Proposal) – keeping in mind there are differences between a specific posting and a continuous recruitment posting. Main differences are:

- **Search Chair** must show the name of the Department Chair who will be reviewing applications and either accepting applicants to the pool or denying.
- Many fields will be prepopulated based on the continuous recruitment posting template. Some have text [IN BRACKETS] that will require some customization.
- Three standard required **Supplemental Questions** will default when using the continuous recruitment posting template.
  - If your discipline, requested additional supplemental questions either:
    - Click on the orange **Add a Question** button and use a key word search to find it and check the box next to the desired question(s) and select the Submit button.
    - **or**
    - If the question is not in the question bank, you may Add a New One at the bottom of the screen. HR will receive notice to approve it.
  - If desired, check the box to make the question required. You may also reorder by renumbering.
  - To make a question disqualifying, click on the question to view the answers. Below the ‘Disqualifying’ header, click the box next to the answer that would disqualify an applicant. This would keep an applicant from being reviewed by the Search Committee because of core requirements not being met. Human Resources will review all disqualifying questions and work with you as necessary on supplemental questions.
- **Applicant Documents** - both CV and Resume will initially be shown as optional. Make one of them required based on the academic department’s requirements.
- **Search Committee** must include:
  - ContinuingEd Instruction (‘Dummy’ account used by Outreach PMs to view the pool) – **not applicable for CBE**
  - Associate Dean, other Faculty or Program Associates who may need to view the pool.

![Figure 22: Add Search Committee Member](image-url)
As with other postings, once satisfied with your posting, click on the orange ‘Take Action on this Posting’ button and select ‘Send to Human Resources for Review.’

When a box pops up with a Comments window, you could include a note to HR indicating that this is a new pool posting and ask HR to ‘Please approve for internal’.

Ensure the box is UNCHECKED, so the posting is not added to your watchlist and then select ‘Submit.’

Internally Post Position (Human Resources)
On the newly created discipline posting, HR will Take Action on Posting and Approve for Internal. HR will have ownership of the posting and can manage the posting.

On the College posting, HR will need to add the quick link by following instructions in Add Discipline Quick Links to the College Pool posting below.

Adding Hyperlinks to College Pool Posting
This section addresses how to add the quick links or hyperlinks in the College pool posting. These quick links will direct the applicant to the posting to which they can apply.

Add Discipline Quick Links to the College Pool posting
There best place to find the quick link to a discipline posting is on the top of the posting, near the status

Find the Quick Link, highlight and right click + copy shortcut.

Click on the College Pool Posting

On the top of the Posting Details section, click on Edit

Scroll to Position Summary field and the list of department postings. Most are listed alphabetically, so determine where the new posting belongs and then either type or copy/paste the formula below.

DISCIPLINE NAME- <a href="PASTE HERE">Click here to apply</a>
Copy the quick link, then paste it over the PASTE HERE part of the code (leaving the quotation marks on either side). Ensure the formula mimics the example highlighted below.

![Position Summary](image)

Figure 25: Creating a hyperlink within a posting

Click on **Save** button. Then go back into the posting to test that the hyperlink works.

Once satisfied, click on the orange **Take Action on this Posting** button. Select either ‘Posted’ or ‘Re-Posted’ (whichever status the posting was NOT currently in) Double check that all works as expected and log out.

**Managing Pool Applicants** (Dean Assistant using Ad Hoc Dean/Director Role)

**Requesting updated materials/continued interest**

After applications have been in the pool for a period of time, the Department Chair may wish to refresh the pool by asking individuals to reapply if still interested and provide an updated resume or CV. To initiate this process, the Dean Assistant will need to complete the following steps:

- Login to PeopleAdmin, switch to the **Ad Hoc Dean / Director** role, and click on the refresh button

![Ad Hoc Dean / Director](image)

- Locate the desired continuous recruitment posting and click on the **Applicant** tab within

- Check the box next to each applicant that needs to submit new materials and click on the **top Actions** button, then **Reactivate Application**.

![Reactivate Applications](image)

Figure 26: Reactivate pool applications
A Bulk Reactivate window will open that will allow you to indicate what sections of the application should be re-opened for the applicant to edit. Check all three boxes and click on Submit.

This will change their status and trigger an automated message advising the applicant of the reactivation and how to reapply.

Next, manually trigger an email to the reactivated applicants.

- Return to the desired Continuous Recruitment posting and click on the Applicant tab within
- Again, check the box next to each applicant that has been reactivated
- Click on the top Actions button, then Email Applicants
- From the drop down list, select the email template named “(Ad Hoc)-Manual/No Trigger-Resubmit Pool App” and then click on Preview.

Preview the message and if it looks acceptable, click on Send Emails to send.

After the 10 day window, the Dean Assistant may ask Human Resources to deactivate the application(s) that have not been resubmitted.

- Return to the desired Continuous Recruitment posting and click on the Applicant tab within
- Check the box next to the applicant(s) that need to be deactivated
- Click on the top Actions button, then select Move in Workflow
- Next to Change for all applicants, select ‘Move to Application Expired’ then select Save Changes.
View Applicants Not Approved
To view applicants who were ‘Not Approved’ for the pool, within the posting, click on the Applicants tab and then ‘More Search Options.’

![Applicants tab](image)

Then select ‘Inactive’ and click on Search. Applicants who were disqualified by supplemental questions or were not approved by the department chair will be displayed. To modify the status of any of these applicants,

- In some cases, you may be able to move in workflow, using the Ad Hoc Dean / Director role
- If you are unable to make the desired change, contact Human Resources who can move them directly to the desired status.

![Inactive applicant search](image)

Unique System Set-ups & Configuration for Ad Hoc

Testing Environment
A test instance of PeopleAdmin is available for your use at [https://uwrf-training.peopleadmin.com/hr](https://uwrf-training.peopleadmin.com/hr). It contains a copy of Production data. Your username, password, and security roles will be the same as in Production. It is a copy of production configurations and data that can be used for training or testing purposes. It currently is on a manual refresh schedule. The last refresh date is noted in the lower right hand corner of the screen.
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Be wary of the fact that if in the Training instance, you go into an Ad Hoc college continuous recruitment posting, and click on a hyperlink to a discipline pool posting, it will redirect you into PRODUCTION. If you want to test applying to a discipline posting, access it directly from the Posting menu in the TRAINING instance.

Unique Set-ups for Outreach
Outreach and Continuing Education has two divisions within the PeopleAdmin organizational tree since the hiring in each is done differently:

- Division: Outreach & Continuing Ed
  - Department: J571063 Outreach & Continuing Ed (for hiring Outreach Staff)
  - Department: J571001 Continuing Ed Instruction-Upward Bound (for hiring Upward Bound Staff)

- Division: Continuing Ed Instruction
  - Department: J571001-Continuing Ed Ad Hoc Pool (for hiring Ad Hoc instructors)
    - Program Managers have Hiring Manager access & initiate postings
    - Dean Assistants have Dean/Director access to this department. It enables them to connect and copy applicants from college pool postings to Outreach postings.
    - In workflow transitions, Group Member prompts exist in order to direct email notification and ownership to the appropriate person (versus going to all that have that role within the department).

This set up was done for two primary reasons:

- So Dean Assistants, who need access to Continuing Ed postings do not get Dean/Director email notifications (intended for the Outreach Director and/or Financial Specialist).
- Because Outreach Program Managers do not need access to Outreach staff postings.

Outreach Program Managers use a dummy account in PeopleAdmin to view applicants in pool postings. It will be necessary to change the password whenever PMs turn over to provide some level of restriction.

- Username: ContinuingEd
- Password: **Contact Outreach Financial Specialist for password**
- First & Last: ContinuingEd Instruction
- Email: outreach@uwrf.edu – If a new password is requested, this account will be receive the instructions on reset.

Using this account for Outreach Program Manager pool review, eliminates the need to list each Outreach Program Manager on each pool posting and reduces maintenance.