ISU's Classification and Hiring System

PeopleAdmin 7 User Manual

Creating a Posting
Managing Applicants
Hiring Process

Table of Contents

What's New with PeopleAdmin 7 Job Aid

Purpose: The purpose of this job aid is to help you understand new features and updates relating to the PeopleAdmin 7 (PA7) implementation. In this job aid, you will find information regarding:

- **PeopleAdmin: Old to New**
- **PeopleAdmin 7 Enhancements**
- **Even more to look forward to…Electronic Letter of Intent (eLOI) and Onboarding**

PeopleAdmin: Old to New

Below is a comparison chart of current processes or terms and how they will change in PeopleAdmin 7.

PeopleAdmin 5.8	PeopleAdmin 7
Separate username and password from other ISU accounts	PA7 is integrated with your ISU email address (Net-ID) and password (for internal users only), which will contain multiple user groups when applicable
Add notes to explain what was changed in a Posting or Position	PA7 will automatically log a history of what data changed, when, and by whom in the history tab
Manually enter required information (qualifications, education, experience)	Classifications have required education, experience, and qualifications pre-populated (not-editable). P&S can enter supplemental required information to provide further clarification for a degree or experience (e.g., Bachelor of Science *in Ecology*)
Select Not Interviewed and department enters a comment explaining why not selected	Reasons will be utilized to aid with tracking and metrics, e.g. *Conflict of Interest, No Response to Email or Call, quality of education or experience*
Ability to route actions to any user on campus through status changes	Positions belong to one *Primary Employing Department,* which will take responsibility of the position and control the routing options through owners and workflows
Search active and pending actions to find postings and positions requiring your attention	An Inbox is now utilized to see active items assigned to you/your groups and a Watch List will display items you have decided to bookmark regardless of current owner
Personnel information Form (PIF) needed for preplanning or hiring process	The Hiring Proposal will replace this paper form.
Terminology	*For a complete list of terminology, view the People **Admin Glossary** on the PeopleAdmin project **website**.*
Notice of Vacancy (NOV)	Posting be the new terminology replacing the NOV. Posting number will replace Vacancy ID#.
Pre-Employment Monitoring Form (PEMF)	A Hiring Proposal (HP) will be created instead of a PEMF to request hire. The Hiring Proposal will be auto populated with information from the application.
Minimum (required) Qualifications and Preferred Qualifications	Faculty Positions have Required and Preferred Education and Experience P&S Positions have Required Education and Experience (non-editable) and Supplemental Required Education and Experience as well as Preferred Education and Experience. Merit Positions have Required/Special/ and Preferred Qualifications. All positions will have the opportunity to list required and/or preferred licensure(s) and certification(s).

What's New with PeopleAdmin 7 Job Aid

PeopleAdmin 7 Enhancements

PeopleAdmin 7 has an impressive list of enhancements compared to its predecessor, PeopleAdmin 5.8. The table below describes the category and enhancements users can expect in the new system.

Category	Description of Enhancements
Navigation and Feel	• Ability to use the back button of your browser • Ability to save/return to position descriptions, postings, hiring proposals, etc. • New print option for shortened PDs • Removed duplicate/unnecessary forms and fields • Action links are along the top navigation bar instead of the side page • New numbering system for postings and PDs to indicate position type • Americans with Disabilities Act (ADA) compliant
Automated Communications	• ISU customized email templates to notify a user an action is required • Automatic emails generated to an applicant (i.e., successful submission, position filled) • Ability to configure the system to send automated reference requests on a posting by posting basis when an applicant reaches a certain workflow status

Automatic Routing	• Actions are electronically moved through electronic routing instead of status selection
	• New routing and workflows by position type (i.e., Merit)
	• New user groups and organization structure have been established for routing:
	  ○ ISU
	  ○ Division (Senior VP/President, Provost)
	  ○ College/Unit (Dean /AVP)
	  ○ Department (Dept Chair/Director)
	  ○ Hiring Manager or Posting Admin

Searching	• Keyword searches work across text fields and attached documents on applicants • Ability to narrow supplemental questions by answers and search applicants through keyword searches
Supervisor and Employees	• Ability to connect a supervisor PD to the employee's Position Description (PD) • Faculty member can be noted as a supervisor to access PDs • Ease of updating supervisors
Reporting and Metrics	• Ability to create custom queries in addition to searches on demand • Specific reports available by user groups • Dropdowns instead of text fields (when available) on postings and PDs to allow for standardized reporting and metrics • Able to report on duration of posting, application, etc.

What's New with PeopleAdmin 7 Job Aid

Even More to Look Forward To… Electronic Letter of Intent and Onboarding

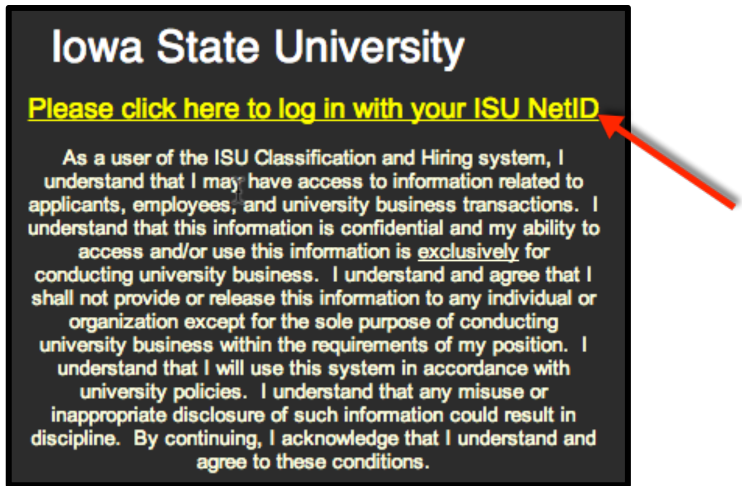
In addition to the new features and benefits of PeopleAdmin7, a team is working on creating an automated electronic Letter of Intent (eLOI). An eLOI workflow has been created in addition to the processing procedures. The eLOI will be triggered automatically after verbal negotiations with the candidate. The candidate has the opportunity to electronically sign and accept the eLOI. The posting admin will confirm the hire in PeopleAdmin7 and University Human Resources will finalize the hire so the new hire can start the onboarding process.

The Onboarding process for new hires is being updated to allow for a consistent new hire experience and ease in completing necessary forms.

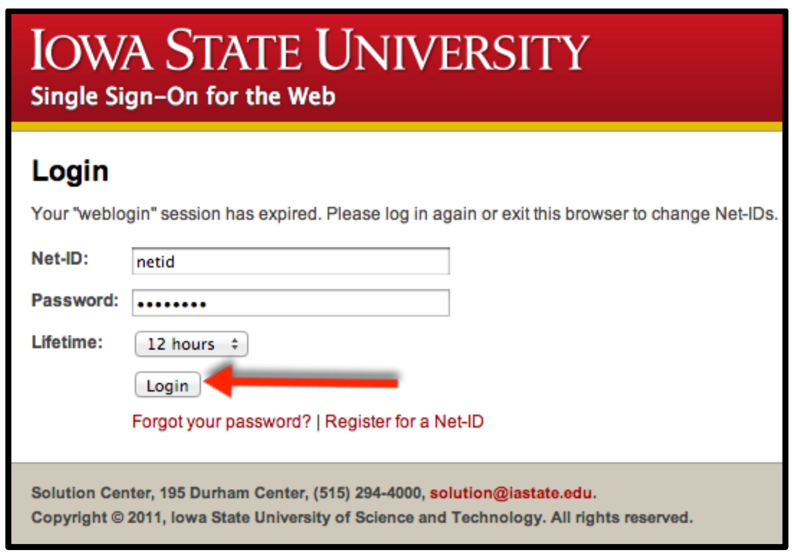
Quick Reference Guide: How to Log into PeopleAdmin7

Instructions: Use the following steps to log into ISU's Classification and Hiring System, PeopleAdmin7. You will need your ISU Net-ID and password to log in to the HR Portal. If you are unsure of your username/password, please contact the Solution Center (515-294-4000). Refer to **Understanding the PeopleAdmin Interface Job Aid** for more detailed descriptions.

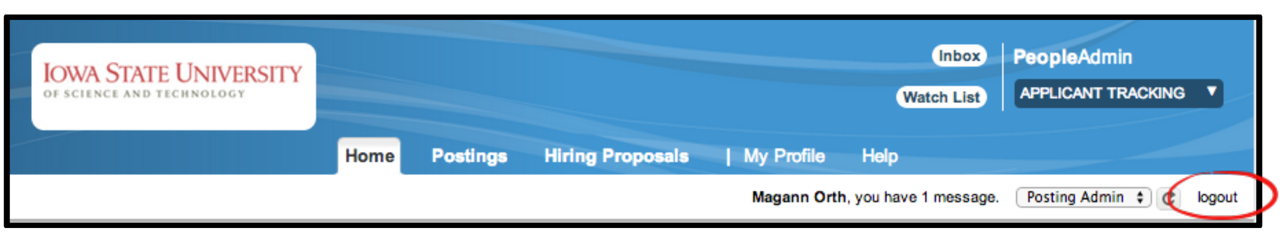
1. Open a **web browser** (e.g. Internet Explorer, Safari, Firefox, Chrome).
2. **Navigate** to www.iastatejobs.com/hr.
3. Click the yellow link "**Please click here to log in with your ISU Net-ID**".



4. Enter the first part of your **ISU Email address** as your Net-ID.
5. Enter your **email address password** in the password field.
6. Click **Login**.



You are now logged into **PeopleAdmin 7**. To log out, click the link on the upper right hand side.



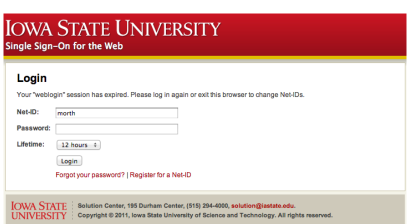
Understanding the PeopleAdmin 7 Interface Job Aid

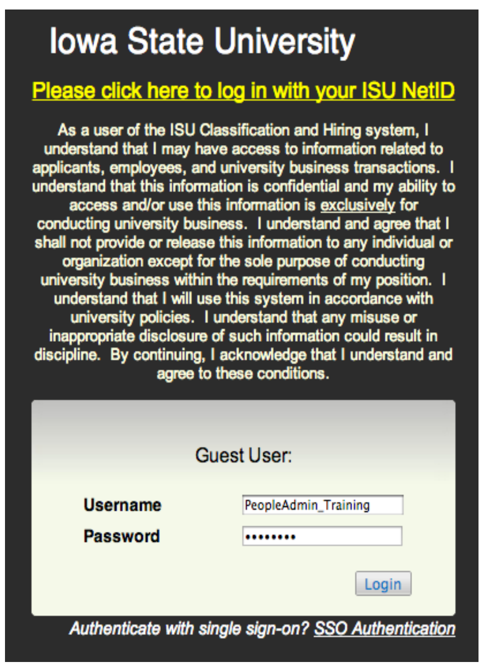
Purpose: The purpose of this Job Aid is to provide a basic overview of the ISU Classification and Hriing System, PeopleAdmin 7, screens and interface including module selection, user groups, inbox and more. A list of PeopleAdmin 7 (PA7) resources and training is also available.

How to Log In
There are two methods of logging into the Iowa State University Classification and Hiring System website: www.iastatejobs.com/hr.

ISU Net-ID Log In

By clicking the **yellow link**, you will be asked to use your **net-id** *(i.e. first part of your ISU email address)* and **password** to log into PA7.





Guest User Log In

If you are part of a **search committee** or are asked to review applicants, use your **provided** guest **username** and **password** to log in.

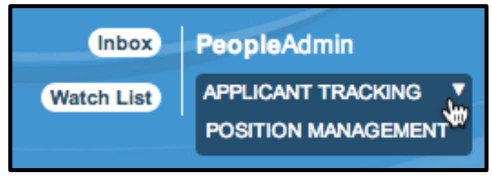
Understanding the PeopleAdmin 7 Interface Job Aid

Home Page

This section will describe the various aspects of the home page, such as the module selection, alerts and information, shortcuts and my links, and understanding user groups.

Module Selection

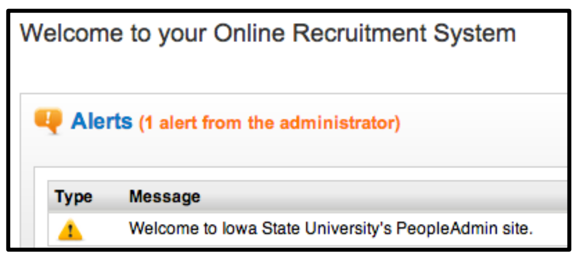
PeopleAdmin is organized by position descriptions and postings. There are three modules available within PeopleAdmin 7:

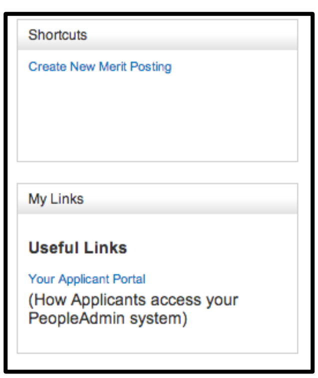


Module	Description
Applicant Tracking	This module is used to create a posting, review and rate applicants, and request and route a hiring proposal. After logging into PeopleAdmin, you will be taken to the applicant-tracking module.
Position Management	The position management module is a tool for managing position descriptions, initiating reclassifications, managing supervisors and viewing classifications for positions at ISU.
Admin	This module is only available to University Human Resources (UHR) and used to manage user permissions, email templates, and various forms and fields.

Alerts and Information

The alerts area will be used by UHR to notify users of important messages, such as a system maintenance schedule or important upcoming deadlines. An alert will show on the system homepage, as necessary. The alert will be removed centrally by the system administrator.



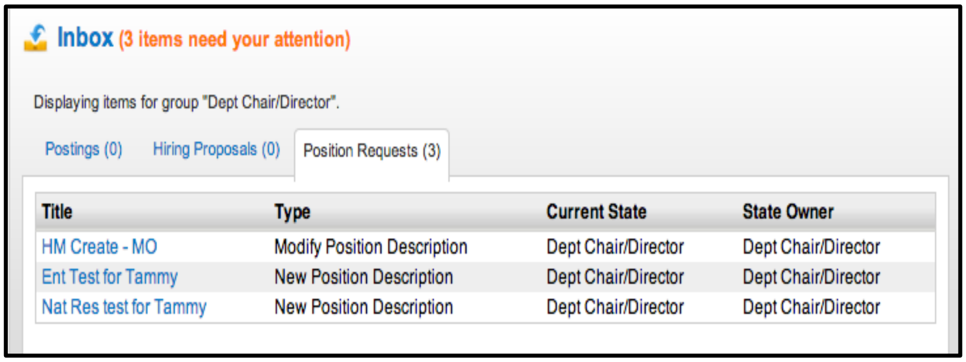


Shortcuts and My Links

This section provides useful links provided by the system administrator to training materials and a shortcut to the Applicant Portal.

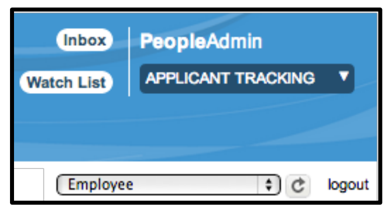
Understanding the PeopleAdmin 7 Interface Job Aid

Inbox
The Inbox is a notification area to display any items that you or those in your user group need to take action upon. The document will not continue in the workflow until you take an action (approve or return). There are three tabs: **Postings**, **Hiring Proposal**, and **Position Requests**. In the screenshot below, there are 3 position requests requiring action by the **State Owner** "Dept Chair/Director":

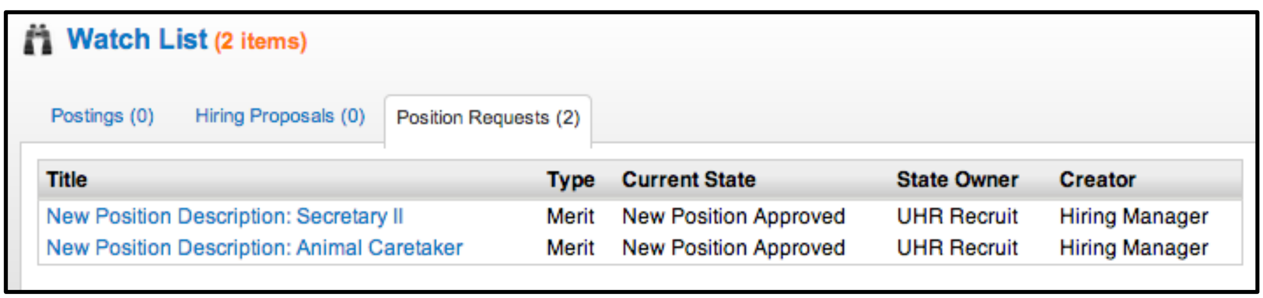


Title	Type	Current State	State Owner
HM Create - MO	Modify Position Description	Dept Chair/Director	Dept Chair/Director
Ent Test for Tammy	New Position Description	Dept Chair/Director	Dept Chair/Director
Nat Res test for Tammy	New Position Description	Dept Chair/Director	Dept Chair/Director

The inbox and watch list can be accessed on your home page or on the upper right corner of the system:



Watch List
The watch list shows the **current state and owner** of the requests that you have flagged to monitor after completing an action (eg. Route to UHR for Approval).



Title	Type	Current State	State Owner	Creator
New Position Description: Secretary II	Merit	New Position Approved	UHR Recruit	Hiring Manager
New Position Description: Animal Caretaker	Merit	New Position Approved	UHR Recruit	Hiring Manager

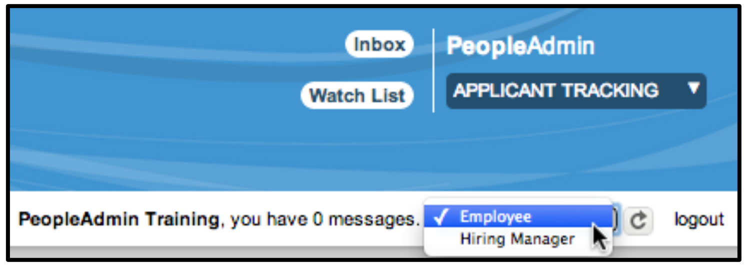
How to remove items from your watch list
After logging into the system, complete the following steps:

1. Click **Watch List** (on the upper right hand corner)
2. Hover over **Actions** and select **Stop Watching Posting.**

The item will be removed from your watch list.

Understanding the PeopleAdmin 7 Interface Job Aid

User Drop Down
To perform actions, you must have the appropriate user group **targeted or toggled**. After toggling groups, click the button to reload the current page.



Use the table below to guide you through the various roles and responsibilities of each user group.

User Group	Description
Employee	Able to view his/her PD and initiate a modification (reclassification or update) action.
Hiring Manager	Used to assign a person to view/edit a position description, typically the functional supervisor of the incumbent.
Posting Admin	The posting admin will manage the posting and applicants. For Faculty/Other and temporary postings, the posting admin will create the posting for fill. The posting admin will route postings for approval, rate and route applicants, and create a hiring proposal for the final candidate(s).
Dept/Director	Users will approve position descriptions (new, modifications, reclassifications), approve postings, review applicants, approve interview selections and approve hiring proposals.
Dean/AVP	
President/Senior VP	
Provost	
Search Committee Member	The search committee member group is used so those associated with the search, but not leading the search, can view applicant documents such as resume and application. The search committee also has the ability to rate applicants within the system.
UHR Only User Groups	
UHR Class and Comp	Classification and Compensation manages classifications, creates and approves new position descriptions, finalizes reclassification requests. UHR Recruitment may route Hiring Proposals to this user group for salary approval.
EO (Equal Opportunity)	EO will review and approve positions requiring a waiver of advertisement.
UHR Recruitment	UHR Recruitment will review position descriptions that are for fill, create postings and route to the posting admin for approval, approve interview requests and hiring proposals in addition to conducting background checks.
System Admin	The system administrator will assign new user groups to employees that have new or updated roles and responsibilities within the system.

Understanding the PeopleAdmin 7 Interface Job Aid

If you need access to additional user groups, please follow these steps:

1. Click **My Profile**
2. Hover over "**Take Action on User**" and click **Request Group Change**
3. Find the new group (i.e. Search Committee Member) and click **Request new group**
4. Select the **scope** (i.e. org unit and department) you would like this group to be tied to
5. Click **Request Group Assignment**

The User Groups page will now reflect that you have requested a user group. The request will be routed to UHR Recruitment and the System Administrators. You will be notified once your request is complete.

Resources for PeopleAdmin 7
The table below lists and describes other available resources for accessing and learning about PeopleAdmin:

Resource	Description
PeopleAdmin Website	peopleadmin.hrs.iastate.edu/
University Human Resources Website	www.hrs.iastate.edu
Recruitment Information for ISU Departments	http://www.hrs.iastate.edu/hrs/recruitment
Classification and Compensation Website	www.hrs.iastate.edu/hrs/classcomp
Provost	www.provost.iastate.edu

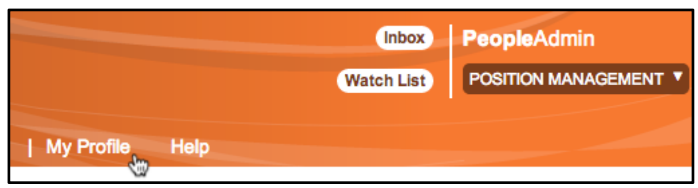
Understanding Your Profile Information Job Aid

Purpose: PeopleAdmin7 (PA7) configures a user profile for each employee at the University. Use this guide to better understand what information is available and how you can personalize PA7.

Access Your Profile

To access your profile, follow the steps below:

1. Log into PeopleAdmin 7 with your ISU Net ID and Password
2. Click **My Profile**



This page will show the **status of your user account**, **supervisor**, and **groups** in which you are assigned.

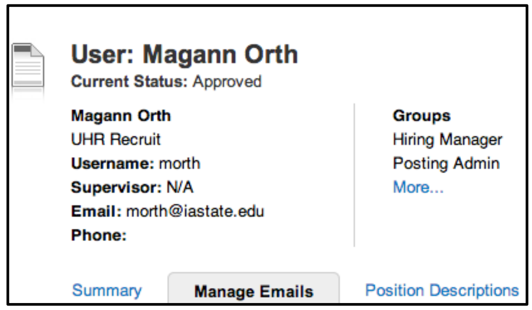
View Organizational Information and Scope

In the summary tab of your profile, you will see your First/Last name, email address, University ID number, and Organizational Unit Ids (set to ISU) and Reporting Org Unit (waiting for info from Lisa).

Understanding Your Profile Information Job Aid

Update Email Prefernces

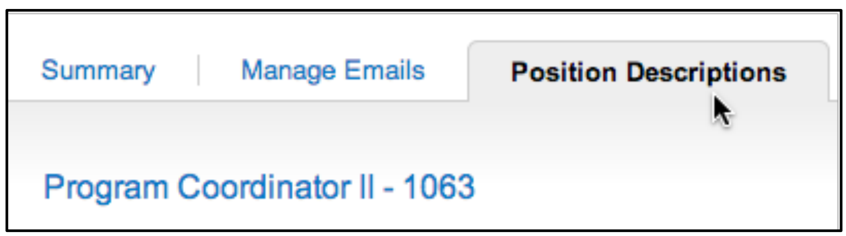
Each user gains access to PA7 with all email notifications turned on. To update your email preferences, follow the steps below:



1. Click **My Profile** in PA7
2. Click the **Manage Emails** tab
3. Check **Opt Out** for System Events or Position Type Events for which you would not like to receive email notifications
4. Click **Update System Email Options** to complete

View Position Descriptions

Although you can view your Position Description (PD) when targeting employee, you can also view your PD through following the steps below:



1. Click **My Profile** in PA7
2. Click the **Position Description** tab
   a. If this is not available, you are not seated in a PD.
3. Click the listed PD to view more information

Understanding Your Profile Information Job Aid

Group Assignments

Group Assignments are very important to PA7. Use the table below to guide you through the various roles and responsibilities of each user group.

User Group	Description
Employee	Able to view his/her PD and initiate a modification (reclassification or update) action.
Hiring Manager	Used to assign a person to view/edit a position description, typically the functional supervisor of the incumbent.
Posting Admin	The posting admin will manage the posting and applicants. For Faculty/Other and temporary postings, the posting admin will create the posting for fill. The posting admin will route postings for approval, rate and route applicants, and create a hiring proposal for the final candidate(s).
Dept/Director	Users will approve position descriptions (new, modifications, reclassifications), approve postings, review applicants, approve interview selections and approve hiring proposals.
Dean/AVP	
President/Senior VP	
Provost	
Search Committee Member	The search committee member group is used so those associated with the search, but not leading the search, can view applicant documents such as resume and application. The search committee also has the ability to rate applicants within the system.

Request a New Group Assignment

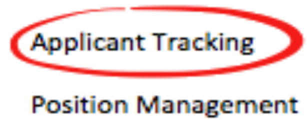
To request a group assignment (such as access to a different department or if your responsibilities have changed), follow the steps below:

1. Click **Take Action on user** on the Summary Page
2. Select **Request Group Change**
    a. This page presents assigned groups and pending assignments
3. Select the **group** you wish to join (see table above for associated description and responsibilities)
4. Click **Request New Group**
5. Select the **organizational unit(s) or department(s) scope** for this requested user group
6. Click **Request Group Assignment** to complete your request

UHR will process your request. You will receive an email when your account is activated or you will see when you log in your user group toggle has the new group.

Quick Reference Guide: Creating A Faculty Posting

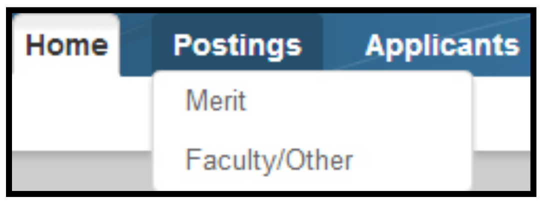
Instructions: Use the following steps to create a new posting in People Admin as a posting admin. A posting should be created when a faculty position needs to be routed, approved, and posted on the IASTATE Jobs website.



✓ Posting Admin

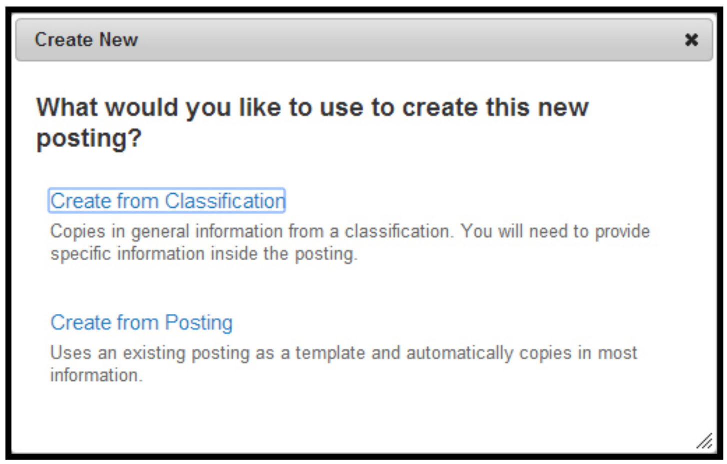
Refer to **Creating a Faculty Posting Job Aid** for more detailed descriptions and guidance for each field.

1. Hover over **Postings** and click **Faculty/Other**.



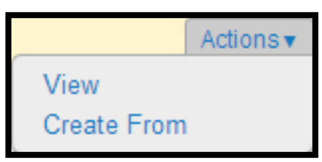
2. Click **Create New Posting** on the top right.

3. Click **Create from Classification** *(to start posting with all fields blank)* or **Create from Posting** (*to create from a similar posting with same classification*).



4. Locate the **Classification/ Position Title** from which to create the posting.

5. Hover over **Actions** and click **Create From.**

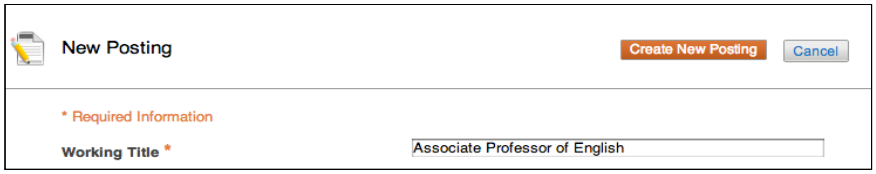


Quick Reference Guide: Creating A Faculty Posting

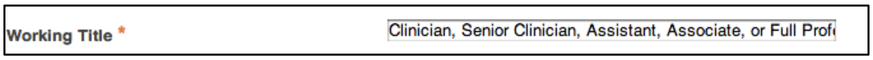
6. Fill out the required information for the new posting:

Enter the Position Title or Series as the **working title**.

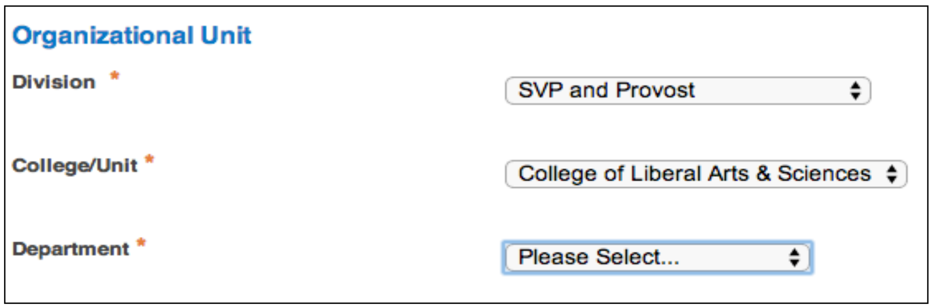
Position Title:



Series Posting:

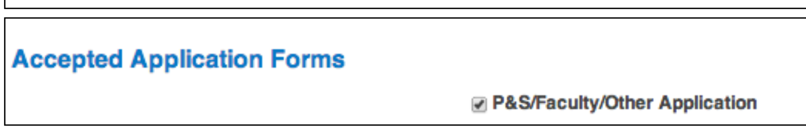


Complete the Organizational Unit ***Note***: This is populated based on your posting admin user group. If multiple departments and/or colleges share the position, the primary college and department should be selected.



(*Optional*) Choose if you would like to **Accept letters of References** through the hiring system (see ***Reference Letter Tool Job Aid***).

Check P&S/Faculty/Other Application



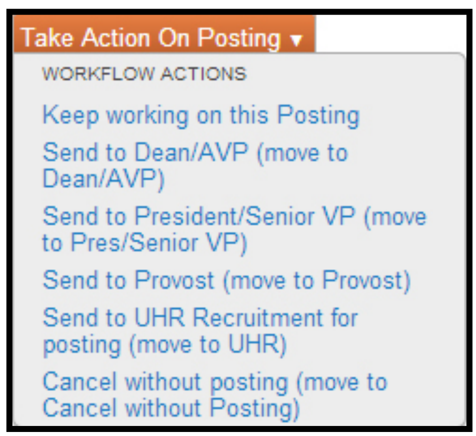
Quick Reference Guide: Creating A Faculty Posting

7. Click Create New Posting.

8. Fill in all the required fields. For more detailed guidance, please refer to ***Create a Faculty Posting Job Aid.***

Note: Completed fields will be denoted by a **blue checkmark** next to the section title (located on the left). The section that you are currently viewing will not have a checkmark.

9. Once all of the posting sections are completed, you will be taken to a summary page. Hover over **Take Action On Posting** and select the appropriate workflow for your organizational structure.



Note: If no college/unit routing/approvals are needed, **Send Posting to UHR for posting on website**.

Alternatively, you can **save** the posting for later (keep working on this posting) or **cancel** the posting.

You should see a green bar appear at the top of the page. A green bar means the **Position Description** has successfully been routed for review. The Current status will also change from **draft** to the appropriate workflow step. If you see a **red bar** the action you were trying to take was unsuccessful, go back and review the noted sections.

Creating a Faculty Posting Job Aid

Purpose: When creating a faculty posting in People Admin 7, use this as a guide to completing the required and optional forms and fields. Reference the **Creating A Faculty Posting QRG** for information on the process of creating a posting.

New Posting

This section provides basic details regarding the new faculty posting you are creating. Use the tables below as guidance for each field.

New Position Description	
*Working Title	The working title (or advertised title) should be the Working Title for the desired Faculty posting (e.g. Associate Professor of English or Adjunct Assistant Professor).
*Division *College/Unit *Department	These fields will be pre-populated based your PeopleAdmin account. If you need to create a posting in a department that is not available to you, please contact UHR Recruitment.
Workflow State	Pre-populated: Under Review by Posting Admin
References	
Accept References	If you would like the system to email the applicant's references, check this option. For more guidance, please use the ***Reference Letter Tool Job Aid***.
Online Applications	
Accept Online applications?	Pre-populated: Checked
Special offline application instructions	To be completed for Affiliate postings
Accepted Application Forms	
Faculty/Other Application	Required, Check this box

Creating a Faculty Posting Job Aid

Position Details

Classification Information	
This area is prepopulated based on classification selection.	
University Title	Pre-populated based on classification selection
Salary	Commensurate with qualifications
Job Category	Faculty/other
Posting Details	
*Appointment Type	Make the appropriate selection. This is an editable field that will be carried over to the hiring proposal.
*Base of Employment	Make the appropriate selection. This is an editable field that will be carried over to the hiring proposal.
*Pay Frequency	Monthly or Semi Monthly
*Number of Months Employed per Year	1-12 months or select semester
Location (if other than Ames)	This field is helpful if the work will be performed somewhere other than Ames for the majority of the time.
*Supervisor's Name	Enter supervisor's name, which will not be viewable on the posting.
*Supervisor's Email	Enter supervisor's ISU email, which will not be viewable on the posting.
Number of Positions	1-9, Pool
*Working Title	Pre-populated from posting settings but editable if needed
*Advertised Employing Department	Please use department name (e.g. English) as opposed to department number.
*Full or Part Time	Full/Part Time.
*Fraction	Used toward FTE total.
Additional Information	Please note important characteristics regarding any of the fields in the Posting Position Detail section to be communicated to posting approvers or UHR.
*Summary of Duties and Responsibilities	Reference Writing a Position Description Job Aid for detailed writing guidance.
Department/Program & College Description	Departments/Units can provide a description of program to provide applicants a better idea of their potential work unit.
About Iowa State University and the Ames Community	Pre-populated.
*Required Education and Experience	Reference Writing a Position Description Job Aid for detailed writing guidance.
*Preferred Education and Experience	

Creating a Faculty Posting Job Aid

Required Licensure(s)/ Certification(s)	Reference ***Writing a Position Description Job Aid*** for detailed writing guidance.
Required Credentialing agency name	Enter credentialing agency name and contact information.
Required Credentialing agency website/contact information	
Preferred Licensure(s)/ Certification(s)	Reference Writing a Position Description Job Aid for detailed writing guidance.
Preferred Credentialing agency name	Enter credentialing agency name and contact information.
Preferred Credentialing agency website/contact information	
Application Instructions	Pre-populated. This section should be modified based on required/optional documents the applicant should upload when applying. Do not edit or remove the code (e.g).
*Proposed Start Date	Enter the proposed start date or text such as “as soon as possible”.
Proposed End Date or Length of Term	Only enter if the posting will be term or if there is a known end date for position.
*Is this posting for external or internal (to ISU), or waiver of advertisement?	Internal/External/Waive of Advertisement.
Business Rationale for internal posting or waiving advertisement	Provide a written description for not posting externally.
For waiver, name of intended hire(s).	Please enter first/last name.
List the recruiting resources the department intends to further advertise the posting. The position will automatically be posted on iastatejobs.com and the Iowa Workforce website. Additional advertising is the responsibility of the hiring department.	✓ ISU Employment Opportunities Website ✓ ISU Employee ✓ Website (other than ISU Employment Opportunities) ✓ Placement Office ✓ Trade Journal ✓ Newspaper ✓ Other
Indicate which specific website, placement office, trade journal, newspaper or other resource that you intend to use.	This field should document any resources the department intends to use to advertise this posting. During the hiring proposal process, you will be asked to confirm if the resources intended were actually used.
*Department Contact Name	This department contact will be used by UHR when approving

Creating a Faculty Posting Job Aid

Department Contact Phone	the PD and also be posted as a contact for applicants.
*Department Contact Email	
Department/Unit Website	Departments/Units can provide links to their specific URL to provide applicants a better idea of their potential work unit.
Guaranteed Consideration Date	Insert the date in which consideration would be granted
Posting End Date	Insert the end date of the posting
Background Check	
What type of background check would you like to conduct?	Information on background check options can be found at: http://www.hrs.iastate.edu/hrs/node/210
Rationale for a credit check	Enter rationale for a credit check, as most candidates do not receive this type of background check. http://www.policy.iastate.edu/policy/background#credit
*Account for background check charge	Account to be charged when the background check is run. Only 7 digits, without dashes
Sub-Account for background check charge	Optional, only 6 digits, without dashes
Advertising Details (HR Only)	
UHR will populate the posting admin, announcement date, posting end date, Special instructions, and pre-employment screening information for the posting.	

Supplemental Questions

The supplemental questions section can be used later to inform the rating process of applicants. There are a few options for supplemental questions:

Adding New Supplemental Questions: Click on the button labeled "Add a Question". A pop up section will appear where you can add an existing question or create a new one.

Adding New Supplemental Questions: There are two ways to search for approved posting questions to add to the job being posted. You can filter using the key word search or filter by question category.

The posting admin or search committee can set up parameters or points for the supplemental answers. The text below explains the automatic rating options:

Assign Points or Disqualifying Responses: Click on the question that has been added and a dropdown menu will appear where points and disqualifying responses can be associated to the posting question.

Creating a Faculty Posting Job Aid

Posting Question Options: Once questions have been added to the posting, you will see a column of checkboxes to the left of each question; checking these boxes will make a question required.

Applicant Documents
Indicate applicant documents that will be required, optional, or not used on the posting. Be sure to update Application Instructions (on the posting) if selecting “other documents”.

Posting Documents Uploading supporting documents, such as Waiver of Advertisement approval and/or any other relevant documents/emails, etc. can be attached in this section.

Guest User
The guest user account can be made and distributed to search committee members to allow access to applicant materials and documentation. The guest account can be used for multiple users. After logging into a guest account, the relevant posting is viewable but not editable.

To utilize the guest user, click on the **Create Guest User Account** button. The system will automatically generate a Guest Username. You may update the password if needed. You can notify the members of the review committee by adding their email address in the **Email Address of Guest User Recipients**. Each email address must be on a separate line. Once you have added all of the email addresses, click on the **Update Guest User Recipient List** to notify the review committee users.

When finished or to skip this section, click the **Next** button.

Search Committee
Currently not utilized by ISU.

Ranking Criteria
Section to be Completed, please do not review.

Adding New Criterion*:* Click on the button labeled "Add a Criterion". A pop up section will appear where you can add an existing criterion or create a new one. This criterion will be routed to UHR for approval.

Adding Existing criterion*:* There are two ways to search for approved criterions to add to the job being posted. You can filter using the key word search or filter by criterion category.

Creating a Faculty Posting Job Aid

Assign Points: Click on the criterion that has been added and a dropdown menu will appear where points can be associated to each answer on the criterion.

Workflow State*:* Select the workflow state in the applicant process when you would like for Search Committee Members to begin rating applicants for the selected criterion.

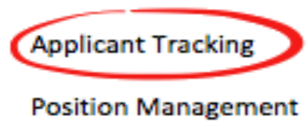
Criterion Weight: You can designate the weight of a criterion relative to others in the weight field. It is recommended your total weights add up to 100 in order to easily use this function. (The system will not check nor force you to have your total weight equal 100).

Reference Letters

Reference Letters	
If you would like the applicant to provide references, please complete this section. Please see ***Reference Letter Tool Job Aid*** for more detailed instructions.	
Accept References	If you would like the applicant to enter references, change to Yes. References are recommended for Assistant level or Lecturer positions.
Minimum Requests	Enter the minimum amount of references the applicant must enter. Be sure to enter a number smaller than the maximum.
Maximum Requests	Enter the maximum amount of references the applicant must enter. Be sure to enter a number larger than minimum.
Cutoff Date	Enter the last day in which the reference is able to submit a reference letter (if using Reference Letter Tool configured in the posting settings).
Provider Special instructions	Enter special instructions to be included in the reference request email (if using Reference Letter Tool configured in the posting settings).

Quick Reference Guide: Creating a P&S Temporary or Emergency Posting

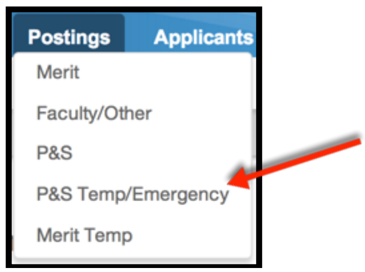
Instructions: Use the following steps to create a new posting in People Admin as a posting admin. A posting should be created when a P&S Temporary or Emergency position needs to be routed, approved, and posted on the IASTATE Jobs website for recruitment (or for waiver).



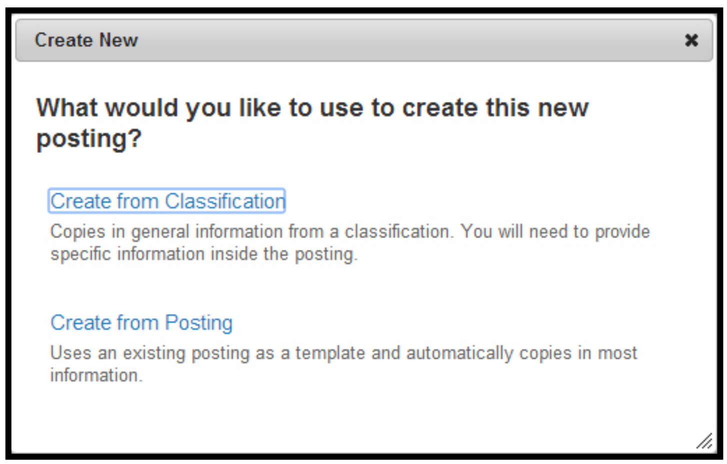
✓ Posting Admin

1. Hover over **Postings** and click **P&S Temp/Emergency**.

2. Click **Create New Posting** on the top right.

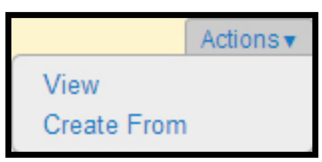


3. Click **Create from Classification** *(to start posting with all fields blank)* or **Create from Posting** (*to create from a similar posting with same classification*).



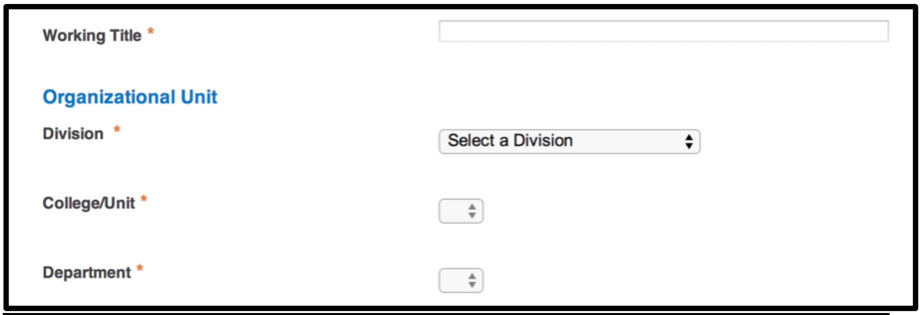
4. Locate the **Classification/ Position Title** from which to create the posting.

5. Hover over **Actions** and click **Create From.**



Quick Reference Guide: Creating a P&S Temporary or Emergency Posting

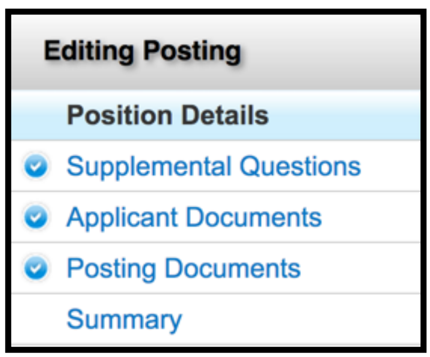
6. Fill out the required information for the new posting.



Check P&S Applications

7. Click **Create New Posting**.

8. Fill in all the required fields. For more detailed guidance, please refer to ***Create a P&S Temporary or Emergency Posting Job Aid.***

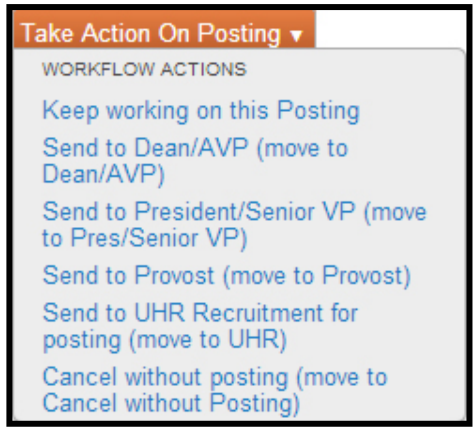


Note: Completed fields will be denoted by a **blue checkmark** next to the section title (located on the left). The section that you are currently viewing will not have a checkmark.

If you are requesting a waiver, be sure to fill out waiver fields including business rationale for waiving advertisement, and name of intended hire if applicable.

Quick Reference Guide: Creating a P&S Temporary or Emergency Posting

9. Once all of the posting sections are complete, you will be taken to a summary page. Hover over **Take Action On Posting** and select the appropriate workflow for your organizational structure.



Note: If you are the HR Liaison, and no further college/unit routing/approvals are needed, move to **HR Liaison Approved Temp Posting (move to UHR).**

If the posting is an **emergency waiver**, route to **Equal Opportunity Office** for non-Academic units. Route the posting to **Provost** for academic units.

Alternatively, you can **save** the posting for later (keep working on this posting) or **cancel** the posting.

You should see a green bar appear at the top of the page. A green bar means the **Position Description** has successfully been routed for review. The Current status will also change from **draft** to the appropriate workflow step. If you see a **red bar** the action you were trying to take was unsuccessful, go back and review the noted sections.

Creating a P&S Temporary or Emergency Posting Job Aid

Purpose: When creating a P&S Temp/Emergency posting in People Admin 7, use this as a guide to completing the required and optional forms and fields. Reference the **Creating A P&S Temp/Emergency Posting QRG** for information on the process of creating a posting.

New Posting

This section provides basic details regarding the new P&S Temp/Emergency posting you are creating. Use the tables below as guidance for each field.

<table>
<tr><th colspan="2">New Position Description</th></tr>
<tr><td>Working Title</td><td>The working title (or advertised title) should be the Working Title for the desired P&S Temp/Emergency posting</td></tr>
<tr><td>Division</td><td rowspan="3">These fields will be pre-populated based your PeopleAdmin account. If you need to create a posting in a department that is not available to you, please contact UHR Recruitment.</td></tr>
<tr><td>College/Unit</td></tr>
<tr><td>Department</td></tr>
<tr><td>Workflow State</td><td>Pre-populated: Under Review by Posting Admin</td></tr>
<tr><th colspan="2">References</th></tr>
<tr><td>Accept References</td><td>This feature will not be used for P&S Temp/Emerg.</td></tr>
<tr><th colspan="2">Online Applications</th></tr>
<tr><td>Accept Online applications?</td><td>Pre-populated: Checked</td></tr>
<tr><td>Special offline application instructions</td><td>This feature will not be used for P&S Temp/Emerg.</td></tr>
<tr><th colspan="2">Accepted Application Forms</th></tr>
<tr><td>P&S Application</td><td>Required, Check this box</td></tr>
</table>

Creating a P&S Temporary or Emergency Posting Job Aid

Position Details

Classification Information	
This area is prepopulated based on classification selection.	
University Title	Pre-populated based on classification selection
Pay Grade	Pre-populated based on classification selection
Salary	Commensurate with qualifications (default)
Job Category	Professional and Scientific
Required Education and Experience	Pre-populated based on classification selection
Posting Details	
*Base of Employment	Make the appropriate selection. This is an editable field that will be carried over to the hiring proposal.
*Appointment Type	Professional and Scientific Temporary XH or Emergency
*Pay Frequency	Select Semi-Monthly if Temporary XH or Monthly if Emergency.
*Number of Months Employed per Year	1-9 months
Location (if other than Ames)	This field is helpful if the work will be performed somewhere other than Ames for the majority of the time.
*Supervisor's Name	Enter supervisor's name, which will not be viewable on the posting.
*Supervisor's Email	Enter supervisor's ISU email, which will not be viewable on the posting.
Working Title	Pre-populated from posting settings but editable if needed (see page 1)
*Advertised Employing Department	Please use department name (e.g. English) as opposed to department number.
*Full or Part Time	Full/Part Time.
*Fraction	Used toward FTE total.
*Shift	Select the shift the employee will be working.
Additional Information	Provide any additional information that would be important for the applicant.
*Summary of Duties and Responsibilities	Reference **Writing a Position Description Job Aid** for detailed writing guidance.
Supplemental Required Education and Experience	Reference **Writing a Position Description Job Aid** for detailed writing guidance.
*Preferred Education and Experience	

Creating a P&S Temporary or Emergency Posting Job Aid

Required Licensure(s)/Certification(s)	Reference Writing a Position Description Job Aid for detailed writing guidance.
Required Credentialing agency name	Enter credentialing agency name
Required Credentialing agency website/contact information	Enter credentialing agency contact information.
Preferred Licensure(s)/ Certification(s)	Reference Writing a Position Description Job Aid for detailed writing guidance.
Preferred Credentialing agency name	Enter credentialing agency name and contact information.
Preferred Credentialing agency website/contact information	
Number of Positions	Provide the amount of positions that will be filled through his posting.
*Proposed Start Date	Enter the proposed start date or text such as “as soon as possible”.
Proposed End Date or Length of Term	Enter the proposed end date or length of term.
*Is this posting for external or internal (to ISU), or waiver of advertisement?	Internal/External/Waive of Advertisement.
Business Rationale for internal posting or waiving advertisement	Provide a written description for not posting externally.
For waiver, name of intended hire(s).	Please enter first/last name.
List the recruiting resources the department intends to further advertise the posting. The position will automatically be posted on iastatejobs.com and the Iowa Workforce website. Additional advertising is the responsibility of the hiring department.	✓ ISU Employment Opportunities Website ✓ ISU Employee ✓ Website (other than ISU Employment Opportunities) ✓ Placement Office ✓ Trade Journal ✓ Newspaper ✓ Other
Indicate which specific website, placement office, trade journal, newspaper or other resource that you intend to use.	This field should document any resources the department intends to use to advertise this posting. During the hiring proposal process, you will be asked to confirm if the resources intended were actually used.

Creating a P&S Temporary or Emergency Posting Job Aid

*Department Contact Name	This department contact will be used by UHR and be posted as a contact for applicants.
Department Contact Phone	
*Department Person e-mail	
*Do you want this posted longer than the required advertisement period on iastatejobs.com?	The required advertisement period is noted in the Open Search Policy (www.policy.iastate.edu/policy/opensearch).
If yes, how many calendar days would you like the posting to appear on the web?	Enter calendar days (e.g. 15) you would like to appear on the web. Alternatively, enter the date you would like the posting to be taken down.
Background Check	
What type of background check would you like to conduct?	Information on background check options can be found at: http://www.hrs.iastate.edu/hrs/node/210
Rationale for a credit check	Enter rationale for a credit check, as most candidates do not receive this type of background check. http://www.policy.iastate.edu/policy/background#credit
Account for background check charge	Account to be charged when the background check is run. Only 7 digits, without dashes
Sub-Account for background check charge	Optional, only 6 digits, without dashes
Advertising Details (HR Only)	
UHR will populate the posting admin, announcement date, posting end date, Special instructions, and pre-employment screening information for the posting.	

Supplemental Questions

The supplemental questions section can be used later to inform the rating process of applicants. There are a few options for supplemental questions:

Adding New Supplemental Questions: Click on the button labeled "Add a Question". A pop up section will appear where you can add an existing question or create a new one.

Adding Existing Supplemental Questions: There are two ways to search for approved supplemental questions to add to the job being posted. You can filter using the key word search or filter by question category.

Assign Points or Disqualifying Responses: Click on the question that has been added and a dropdown menu will appear where points and disqualifying responses can be associated to the

Creating a P&S Temporary or Emergency Posting Job Aid

supplemental question.

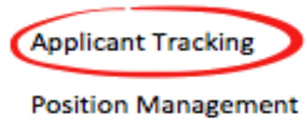
Supplemental Question Options: Once questions have been added to the posting, you will see a column of checkboxes to the left of each question; checking these boxes will make a question required.

Applicant Documents
Indicate applicant documents that will be required, optional, or not used on the posting. Be sure to update Application Instructions (on the posting) if selecting “other documents”.

Posting Documents
Uploading supporting documents, such as Waiver of Advertisement approval and/or any other relevant documents/emails, etc. can be attached in this section.

Quick Reference Guide: Creating a Merit Temporary Posting

Instructions: Use the following steps to create a new Merit Temporary posting in People Admin7 as a posting admin. A posting should be created when a Merit Temporary position needs to be routed, approved, and posted on the IASTATE Jobs website for recruitment (or waiver).

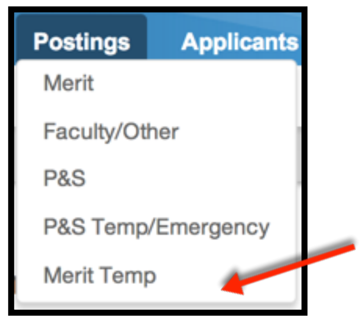


✓ Posting Admin

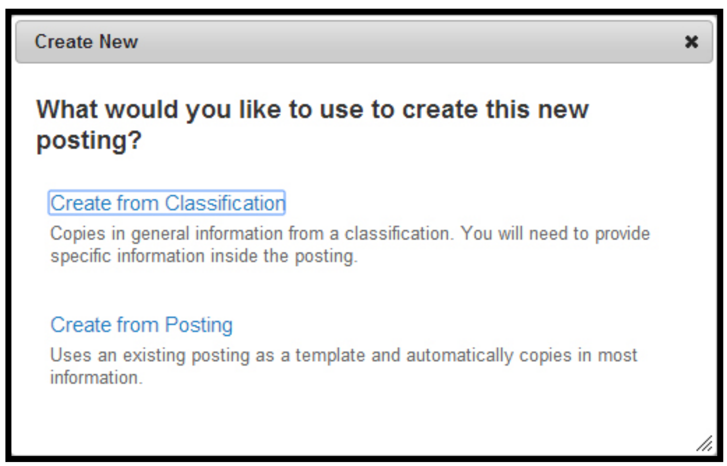
Refer to **Creating a Merit Temporary Posting Job Aid** for more detailed descriptions and guidance for each field.

1. Hover over **Postings** and click **Merit Temp**.

2. Click **Create New Posting** on the top right.

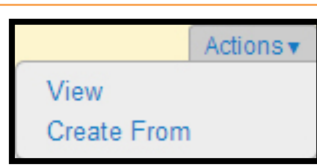


3. Click **Create from Classification** *(to start posting with all fields blank)* or **Create from Posting** (*to create from a similar posting with same classification*).



4. Locate the **Classification/ Position Title** from which to create the posting.

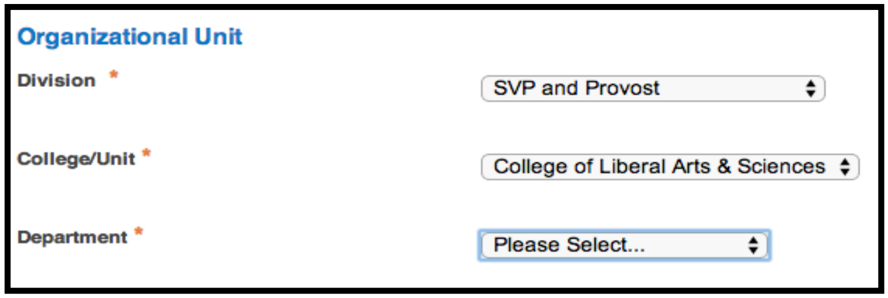
5. Hover over **Actions** and click **Create From.**



Quick Reference Guide: Creating a Merit Temporary Posting

6. Fill out the required information for the new posting:

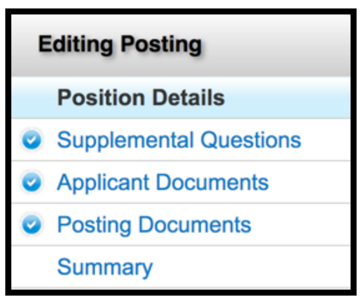
Note: This is populated based on your posting admin user group.



7. Click **Create New Posting on the top right**.

8. Fill in all the required fields. For more detailed guidance, please refer to ***Create a Merit Temporary Posting Job Aid.***

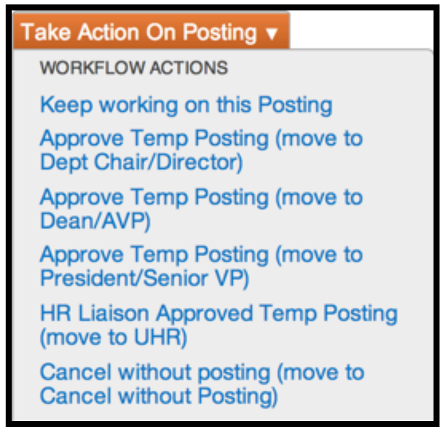
Note: Completed fields will be denoted by a **blue checkmark** next to the section title (located on the left). The section that you are currently viewing will not have a checkmark.



If you are requesting a waiver, be sure to fill out waiver fields including business rationale for waiving advertisement, and name of intended hire if applicable.

Quick Reference Guide: Creating a Merit Temporary Posting

9. Once all of the posting sections are completed, you will be taken to a summary page. Hover over **Take Action On Posting** and select the appropriate workflow for your organizational structure.



Note: If you are the HR Liaison, and no further college/unit routing/approvals are needed, move to **HR Liaison Approved Temp Posting (move to UHR).** Alternatively, you can **save** the posting for later (keep working on this posting) or **cancel** the posting. If the posting is a waiver, route to Equal Opportunity Office for non-Academic units. Route the posting to Provost for academic units.

You should see a green bar appear at the top of the page. A green bar means the **Position Description** has successfully been routed for review. The Current status will also change from **draft** to the appropriate workflow step. If you see a **red bar** the action you were trying to take was unsuccessful, go back and review the noted sections.

Creating a Merit Temporary Posting Job Aid

Purpose: When creating a Merit Temporary posting in People Admin 7, use this as a guide to completing the required/optional forms and fields. Reference the **Creating A Merit Temporary Posting QRG** for information on the process of creating a posting.

New Posting

This section provides basic details regarding the new Merit Temporary posting you are creating. Use the tables below as guidance for each field.

New Position Description	
Position Title	The working title (or advertised title) should be the University Title for the desired Merit Temporary posting.
Division College/Unit Department	These fields will be pre-populated based your PeopleAdmin account. If you need to create a posting in a department that is not available to you, please contact UHR Recruitment.
Workflow State	Pre-populated: Under Review by Posting Admin.
References	
Accept References	If you would like the system to email the applicant's references, check this option. For more guidance, please use the ***Reference Letter Tool Job Aid***.
Online Applications	
Accept Online applications?	Pre-populated: Checked
Special offline application instructions	Not utilized on Merit Temporary Postings.
Accepted Application Forms	
Merit Application	Required, Check this box

Creating a Merit Temporary Posting Job Aid

Position Details

Classification Information	
This area is prepopulated based on classification selection.	
University Title	Pre-populated based on classification selection
Salary	Commensurate with qualifications
Job Category	Merit Temporary
Posting Details	
*Position Title	Make the appropriate selection. The University Title is an editable field that will be carried over to the hiring proposal.
Entry Hourly Rate	Starting hourly wage of temporary employee.
*Base of Employment	Make the appropriate XH selection. This is an editable field that will be carried over to the hiring proposal.
*Pay Frequency	Semi-Monthly
Number of Months Employed per Year	Not utilized on Merit Temporary Postings.
Location (if other than Ames)	This field is helpful if the work will be performed somewhere other than Ames for the majority of the time.
*Supervisor's Name	Enter supervisor's name, which will not be viewable on the posting.
*Supervisor's Email	Enter supervisor's ISU email, which will not be viewable on the posting.
*Advertised Employing Department	Please use department name (e.g. English) as opposed to department number.
*Full or Part Time	Full/Part Time.
*Fraction	Used toward FTE total.
*Shift	Select the shift the employee will be working.
*Work Schedule	Assigned hours, days of the week, days off and shift rotations.
*Number of Hours per Week	Select how many hours a week the employee will work.
Additional Information	Provide any additional information that would be important for the applicant.
*Summary of Duties and Responsibilities	Reference **Writing a Position Description Job Aid** for detailed writing guidance.
Special Qualifications	
Preferred Qualifications	
Required Licensure(s)/Certification(s)	
Required Credentialing agency website/contact information	Enter credentialing agency name and contact information.

Creating a Merit Temporary Posting Job Aid

Preferred Licensure(s)/ Certification(s)	Reference Writing a Position Description Job Aid for detailed writing guidance.
Preferred Credentialing agency name	Enter credentialing agency name and contact information.
Preferred Credentialing agency website/contact information	
Number of Positions	Provide the amount of positions that will be filled through his posting.
*Proposed Start Date	Enter the proposed start date or text such as “as soon as possible”.
Proposed End Date or Length of Term	Only enter if the posting will be term or if there is a known end date for position.
*Is this posting for external or internal (to ISU), or waiver of advertisement?	Internal/External/Waive of Advertisement.
Business Rationale for internal posting or waiving advertisement	Provide a written description for not posting externally.
For waiver, name of intended hire(s).	Please enter first/last name.
List the recruiting resources the department intends to further advertise the posting. The position will automatically be posted on iastatejobs.com and the Iowa Workforce website. Additional advertising is the responsibility of the hiring department.	✓ ISU Employment Opportunities Website ✓ ISU Employee ✓ Website (other than ISU Employment Opportunities) ✓ Placement Office ✓ Trade Journal ✓ Newspaper ✓ Other
Indicate which specific website, placement office, trade journal, newspaper or other resource that you intend to use.	This field should document any resources the department intends to use to advertise this posting. During the hiring proposal process, you will be asked to confirm if the resources intended were actually used.
*Department Contact Name	This department contact will be used by UHR when approving the PD and also be posted as a contact for applicants.
Department/Unit Website	Departments/Units can provide links to their specific URL to provide applicants a better idea of their potential work unit.
*Do you want this posted longer than the required advertisement	Not utilized on Merit Temporary Postings.

Creating a Merit Temporary Posting Job Aid

period on iastatejobs.com?	
If yes, how many calendar days would you like the posting to appear on the web?	Enter calendar days (e.g. 10) you would like to appear on the web. Alternatively, enter the date you would like the posting to be taken down.
Background Check	
What type of background check would you like to conduct?	Information on background check options can be found at: http://www.hrs.iastate.edu/hrs/node/327
Rationale for a credit check	Enter rationale for a credit check, as most candidates do not receive this type of background check. http://www.policy.iastate.edu/policy/background#credit
Account for background check charge	Account to be charged when the background check is run. Only 7 digits, without dashes
Sub-Account for background check charge	Optional, only 6 digits, without dashes
Advertising Details (HR Only)	
UHR will populate the posting admin, announcement date, posting end date, Special instructions, and pre-employment screening information for the posting.	

Supplemental Questions

The supplemental questions section can be used later to inform the rating process of applicants. There are a few options for supplemental questions:

Adding New Supplemental Questions: Click on the button labeled "Add a Question". A pop up section will appear where you can add an existing question or create a new one.

Adding Existing Supplemental Questions: There are two ways to search for approved supplemental questions to add to the job being posted. You can filter using the key word search or filter by question category.

Assign Points or Disqualifying Responses: Click on the question that has been added and a dropdown menu will appear where points and disqualifying responses can be associated to the supplemental question.

Supplemental Question Options: Once questions have been added to the posting, you will see a column of checkboxes to the left of each question; checking these boxes will make a question required.

Creating a Merit Temporary Posting Job Aid

Applicant Documents
Indicate applicant documents that will be required, optional, or not used on the posting. Be sure to update Application Instructions (on the posting) if selecting "other documents".

Posting Documents
Uploading supporting documents, such as Waiver of Advertisement approval and/or any other relevant documents/emails, etc. can be attached in this section.

Rating and Routing Applicants Job Aid

Purpose: This job aid will provide the Posting Admin or search committee important information when reviewing and rating applicants for merit, faculty/other, or P&S postings. For campus wide consistency, the rating process is completed by assigning a value to each of the applicants instead of free text comments. The Not Qualified or Qualified 0-5 value rating will allow a reviewer and UHR to understand why an applicant was or was not chosen to continue in the hiring process.

What Is an Applicant Status?

The Posting Administrator and those involved in the hiring process use applicant statuses to rate and classify applicants. The applicant status indicates if an applicant is rated (not qualified or qualified 0-5), selected for an interview, not interviewed, or placed in a review/holding state for the possibility of later consideration.

Viewing Applications

During the posting period, the Posting Admin and other users associated with this posting can view applicant materials as they apply. As applicants complete applications, the Posting Admin will enter ratings and be able to flag and route applicants for interview selection. If the posting is for pools (e.g. lecturer pool) applicants can be rated, flagged and routed before the posting closes.

1. Log into **PeopleAdmin**.
2. Update your Role to **Posting Admin** (or **Search Committee**)
3. Click the **refresh** button
4. Hover over the Postings tab and click the appropriate **position type** (e.g. Merit)

Rating and Routing Applicants Job Aid

5. Search for the **Posting title** or locate the posting in the list below
6. Click hover over **Actions** to select **View Applicants**
7. Review the application materials individually or in bulk:
    a. **Individual View**: Click on the applicant's last name to view full application and supporting documents. You may view documents individually or generate a combined PDF of all documents near the bottom of the page.
    b. **Bulk View:** To view applicant materials in bulk, select applicants by checking the boxes to the left of the applicant's name. Next, click **Actions** then click **Download Applications as PDF** (individually or combined into one PDF) **.** You will then have the choice of which documents will open. The applicants' material will now open in a new browser tab or window. *Adobe Reader must be installed to view the materials properly.*

Viewing Reference's Recommendation

After the applicants recommendations have been sent back, you are able to review the provided information. To do this:

1. Navigate to the **posting** on People Admin and click on **Applicants.** Click the appropriate **Applicant**'s last name.

2. While viewing the **Applicant** information you will see three tabs: **Summary, Recommendations** followed by 2 numbers (for example 1 of 1), and **History.** Click the **Recommendations** tab.

3. You will see **Reference Requests** if an email has been sent out to a reference but either they have not yet responded or there was an issue sending an email. Below **Reference Requests** is where you will see completed **Recommendations.**

Rating and Routing Applicants Job Aid

Rating Applicants (Posting Admin Only)
Owner: Posting Admin
Current Status: Under Review by Posting Admin

The Posting Admin must review each applicant and provide a rating (either hiring manager's rating or on behalf of the search committee). The rating range is 0-5 or Not Qualified; with 5 being the rating of the best qualified candidate(s) based on preferred qualifications on posting. After the Posting Admin enters the rating, the she/he can move the applicant to a new status or keep the applicant at this holding state until such time the Posting Admin is ready to move the applicant to a final status. If an applicant is chosen for an interview, the status is changed to "flagged for interview" and moved to the next approver.
The "not reviewed, rec'd after consideration date" status should only be used for applicants who applied after the guaranteed consideration date and have not been viewed for this posting. If someone views the applicant, the applicant must be rated.

1. View an Applicant (*that has the workflow state as Under Review by Posting Admin*) by individual or bulk view
    a. **Individual View**: Click on the applicant's last name to **Take Action on Job Application**
    b. **Bulk View:** To rate applicants in bulk, select applicants by checking the boxes to the left of the applicant's name. Next, click **Actions** to **Move in Workflow** *(if moving in workflow, At step 5 you will have to select an individual or move in bulk again)*
2. Select **Rate Applicant**
3. Select a **rating/reason** (Qualified 0-5, or Not Qualified) from the dropdown when prompted
4. Click **Submit** and you will see a green message and the **Owner**: Posting Admin, **Current Status**: Rate Applicant near the top of the applicant's name
5. Click **Take Action on Job Application** for the same applicant
6. Select the state in which to **route the applicant** (e.g. Flag for Interview) or move the applicant to an inactive status (see table below).

Confirm the status change when prompted and you will see a green message and the **Owner**: {Next Approver}, **Current Status**: {Selected Status}

After completing the rating, the applicant will be routed to the next approver in your organization structure and finally UHR. The HR Liaison will change the status of each flagged applicant to "Request for Interview" and route it to UHR. Once UHR has reviewed and approved the interview request, the Posting Admin will be notified via system generated email. At this point, the hiring manager, supervisor, or search committee can begin scheduling interviews with approved candidates.

Rating and Routing Applicants Job Aid

Flag/Request an Applicant for Interivew
After viewing an applicant's materials (application and documents if applicable), the current owner of the applicant can update the status to move the applicant to the next reviewer. When the applicant is routed to the HR Liaison, the HR Liaison will change each flagged applicant to the status of "Request for Interview" which will route the applicant to UHR for approval.

1. View an applicant to route for interview by individual or bulk view
    a. **Individual View**: Click on the applicant's last name to **Take Action on Job Application**
    b. **Bulk View:** To move applicants in bulk, select all applicants by checking the boxes to the left of the applicant's name. Next, click **Actions** to **Move in Workflow**
2. Select **Take Action on Job Application** to view available status options (*For a full listing of options, please see the indices below.*)
3. Select the state in which to **update the applicant**
4. **Confirm** the status change when prompted

After completing the rating, the applicant will be routed to the next approver in your organizational structure and finally UHR. Once UHR has reviewed and approved the interview request, the Posting Admin will be notified via system email. At this point, the hiring manager, supervisor, or search committee can begin scheduling interviews with candidates.

Rating and Routing Applicants Job Aid

INDEX: Available Workflow Actions

The following statuses are available for updating the workflow of an applicant. During the workflow, an applicant can be returned to the Posting Admin if the approver finds the applicant unacceptable for interview.

Available Workflow Actions			
Action Label	**Email Action**	**Updated Owner**	**Is Applicant active and under consideration?**
Rate Applicant	N/A	Posting Admin	Yes
Flagged for Interview	Email to Dept. Chair/Director user	Dept Chair/ Director user	Yes
Flagged/Request for Interview	Email to Dean/AVP user	Dean/AVP user	Yes
Flagged/Request for Interview	Email to President/Senior Vice President user	President/ Senior Vice President user	Yes
Return to Posting Admin	Email to Posting Admin	Posting Admin	Yes
Request for Interview	Email to UHR Recruit	UHR Recruit	Yes
Approved for Interview	Email to Posting Admin	Posting Admin	Yes

INDEX: Applicant Status Options

The following statuses are available for applicants.

Applicant Status Options				
Action Label	*Email Action*	*Updated Owner*	*Is Applicant under consideration?*	*Available Reason Codes*
** Denotes the applicant sees “No Longer Under Consideration” on the applicant portal. An email notification is sent at the time the posting is filled/closed.*				
Application Withdrawn	N/A	Applicant	No	N/A
Does not Meet Required Education and Experience	Email to Applicant, when filled	Posting Admin	No *	• Does not meet education requirement • Does not meet experience requirement • Does not meet license/certification requirement
Does not Meet Required Qualifications - Merit only	Email to Applicant, when filled	Posting Admin	No*	• Does not possess required knowledge, skill or ability • Does not meet required experience or education/training • Does not meet license/certification requirement
Under Review by Posting Admin	Email to Posting Admin	Posting Admin	Yes	N/A

Rating and Routing Applicants Job Aid

Applicant Status Options				
Action Label	*Email Action*	*Updated Owner*	*Is Applicant active & under consideration?*	*Available Reason Codes*
Flagged for Interview	Email to new owner	Next approver	Yes	N/A
Request for Interview	Email to UHR Recruitment	UHR Recruitment	Yes	N/A
Not Reviewed – Rec'd after consideration date	Email to Applicant, when filled	Posting Admin	No*	N/A
Interviewed, Not Hired	Email to Applicant, when filled	Posting Admin	No *	• More suitable candidate • Job offer declined • Candidate withdrew
Not Interviewed	Email to Applicant, when filled	Posting Admin	No*	• Applicant withdrew application • Experience less desirable/relevant • Education less desirable • Skill set does not match needs of the position • Conflict of Interest • Quality of professional references • Inaccurate application • No response to email or call • Not available for the required hours of work • Application incomplete or late • Employment History • Did not show for Interview
Not Interviewed – Faculty/Other only	Email to Applicant, when filled	Posting Admin	No*	• Applicant withdrew application • Education less desirable/relevant • Quality of work experience • Quality or relevancy of teaching experience • Quality or relevancy of extension/professional practice • Quality or relevancy of research experience • Quality or scope of grant proposals awarded • Quality or scope of publication record • Conflict of interest • Quality of professional references • No response to email or call • Application incomplete or late
Withdrawn	N/A	UHR Recruitment	No	N/A
Selected for Hire	N/A	Posting Admin	Yes - *A Hiring Proposal can be started from this status.*	N/A

Rating and Routing Applicants Job Aid

INDEX: Applicant Status Options for UHR Only

The following statuses are only available for UHR use when updating applicants.

Available Applicant Statuses: HR Use Only				
Action Label	*Email Action*	*Updated Owner*	*Is Applicant active & under consideration?*	*Available Reason Codes*
** Denotes the applicant sees "No Longer Under Consideration" on the applicant portal. An email notification is sent at the time the posting is filled/closed.*				
Hired	N/A	UHR Recruitment	Hired	N/A
Merit Application Not Eligible (contract provision) - Merit Only	Email to Applicant, when filled	UHR Recruitment	Yes	N/A
Merit Transfer not most senior - Merit Only	Email to Applicant, when filled	UHR Recruitment	No*	N/A
Merit Transfer withdrew after deadline but before Offer - Merit Only	Email to Applicant, when filled	UHR Recruitment	No*	N/A
System Det'd Did Not Meet Min Quals** ***If disqualified by posting specific questions*	N/A	UHR Recruitment	No*	N/A
Not Certified - Merit Only	Email to Applicant, when filled	UHR Recruitment	No*	N/A
UHR - Not Approved for Interview	Email to Applicant, when filled	UHR Recruitment	No*	• Applicant withdrew application (please specify) • Experience less desirable/relevant • Education less desirable • Skill set does not match needs of the position • Conflict of Interest • Quality of professional references • Inaccurate application (please specify) • No response to email or call • Not available for the required hours of work • Application incomplete or late • Employment History • Did not show for Interview

Quick Reference Guide: Initiating a Hiring Proposal QRG

Instructions: Use this quick reference guide to help you initiate the hiring proposal (HP) and hiring process for Merit and P&S Staff. A Hiring Proposal needs to be completed after a candidate has been selected for hire. To complete this process, see **Completing a Hiring Proposal QRG**.

Step 1: Select a Candidate for Hire

In order to initiate a hiring proposal, an applicant status must be updated to "Selected for Hire". To do this, follow the steps below:

1. Open the posting from your inbox
2. Click the **Applicant tab**
3. Click the applicant's **last name**
4. Hover over **Take Action on Job Application** and update status to **Selected for Hire**
5. Click **Start Hiring Proposal** and move to **Step 2**

Step 2: Initiate the Hiring Proposal

To initiate the hiring proposal for the applicant, follow these steps:

1. Type in Faculty/Other Position Title (e.g. Faculty or Assistant Professor – Animal Science).
2. Select the Primary Employing Division, College/Unit, and Department from the available dropdown menus.
3. Click Start Position Requests.

Quick Reference Guide: Initiating a Hiring Proposal QRG

Step 3: Complete Required Fields
Fill in the required fields of the Hiring Proposal. Completed sections will be denoted by a blue checkmark next to the section title in the menu on the left. Use the table below to complete the forms and fields:

Hiring Proposal	
Applicant Information	
Fist Name	First name and Middle name are populated from the application.
Middle Name	
Last Name	Enter in the last name of the applicant. This is not populated in case the last name may have changed since first applying.
Address	Mailing Address of the candidate.
City	
State	
Zip Code	
Country	
Country Code	
Primary Contact Phone	Contact Information of the Candidate.
Email	

Position Information	
Hiring Proposal Number	Automatically generated after the hiring proposal is routed.
Position Number	Generated from the posting.
University Title	
Pay Grade	
Appointment Type	
Base of Employment	
Number of Months Employed Per Year	
Fraction	
*Employment Start Date	Declare an official start date for the applicant. The eLOI will use this date as the start date.
Employment End Date	Enter a date for Term or less than 12 months.
*Have you completed required reference checks?	Yes/No. If no, UHR will route back to Posting Admin before approving the Hiring Proposal.
Number of Positions	Generated from the posting.
*Supervisor Name	
*Supervisor Email	

Quick Reference Guide: Initiating a Hiring Proposal QRG

User Group Assignment	
Will this position supervise Merit or P&S staff?	Yes/No
User Group Assignment – Hiring Manager	If the position will be supervising, select this checkbox to request this person to have access to PDs of direct reports.
User Group Assignment – Dept/Chair or Director	If this position will be a department chair or director, select this checkbox to request this person to manage PDs, postings and applicants.
Departments	Select up to 5 relevant departments by holding down Control.

Salary	
*Proposed Annual Salary (Merit: Prepopulated Hourly Rate)	A free text field to enter a specific salary (e.g. $45,956) or a range ($43,000-47,000).
Rationale for salary if above hiring range	If the salary is above the hiring range, be sure to seek appropriate approvals outside of the system.
Special Conditions for system-generated LOI.	Information entered here will not populate the electronic Letter of Intent (eLOI) in AccessPlus which will be implemented later this year.

Budget (One Entry Required)	
*Account	7 digits, no dashes
Sub-Account	Optional: 6 digits, no dashes
*Account # % (1-100)	Enter percentage

Hiring Proposal Documents
Enter documents here regarding outside approvals or documents you would like to be attached to this HP record.

Quick Reference Guide: Initiating a Hiring Proposal QRG

Offer Accepted and Recruitment	
*This section will be completed during the **completing a hiring proposal** process.*	
Social Security Number	Enter the candidate's Social Security number.
University ID Number	Enter in the University ID Number of the candidate.
Posting Number	Automatically generated from the Posting.
First and Last Name of Person Confirming Hire	Enter First /Last name here.
Date Hire Confirmed	Enter the date the hire was confirmed.

Recruitment/Advertisement confirmation	
Please List the Recruiting resources that were actually used to advertise this position. This information is vital for the ISU Affirmative Action Plan. For your convenience, the recruiting resource you intended to use when the posting was created can be found below.	Enter the resources you used to advertise this position. Directly underneath is an automatically generated list of all the resources you planned to use. This list was generated from the posting.
List the recruiting resources the department intends to further advertise the posting. The position will automatically be posted on iastatejobs.com and the Iowa Workforce website. Additional advertising is the responsibility of the hiring department.	Prepopulated from the posting.
Indicate which specific website, placement office, trade journal, newspaper or other resource that you intend to use.	Prepopulated from the posting.

Quick Reference Guide: Initiating a Hiring Proposal QRG

Step 4: Route the Hiring Proposal for Approval
The Hiring Proposal will be routed through the workflow for approval. Hover over Take Action on Hiring Proposal and select the appropriate workflow for your organizational structure. After approval, see **Completing a Hiring Proposal QRG**. Use the table below to better understand the available statuses.

Workflow Status	Description
Under Review by Posting Admin Send to Dept. Chair/Director Send to Dean/AVP Submit President / Senior Vice President	The Posting Admin transfers the hiring proposal to the **Dept. Chair/Director** and **Dean/ AVP (depending on organizational structure)** to edit and/or approve the Hiring Proposal. The last approver routes the HP to UHR Recruitment.
Submit to UHR Recruitment (Request to Extend Offer) *As Needed:* Submit to UHR Class & Comp	**UHR Recruitment** reviews the Hiring Proposal. Once the Hiring Proposal is approved, the Hiring Proposal is transferred to the **Approved to Extend Offer** workflow state. For P&S Staff, if the salary proposal is above the hiring salary range then the Hiring Proposal is sent to **UHR Class & Comp** to approve the proposed salary.
Approve to Extend Offer (Posting Admin)	During the **Approved to Extend Offer** workflow status, negotiation with the candidate occurs. This process is done outside of People Admin among the Posting Admin, Hiring Authority and the Candidate. Once negotiations are complete, the Posting Admin must transition the Hiring Proposal to the **Final Verbal Offer Details** workflow state.
Final Verbal Offer Details Offer Declined Offer Accepted confirmed Hire (Posting Admin)	The Letter of Intent (LOI) is sent to the candidate. If the candidate signs the Letter of Intent, the Posting Admin must transition the Hiring Proposal to the **Offer Accepted-send to UHR Finalize Hire** workflow state. If the candidate declines, the posting admin will need to update the status of the applicant and start hiring an alternative (if needed).
Offer Accepted-Send to UHR Finalize Hire	Once the Hiring Proposal has been transitioned to **Offer Accepted-send to UHR Finalize Hire,** the Hiring Proposal is routed to Human Resources. HR will update administrative systems and will begin the new hire process with the employee.

Quick Reference Guide: Initiating a Hiring Proposal QRG

Step 5: Update other Applicants
For applicants that are not selected for hire, update the applicant status. To do this, complete the following steps:

1. Open the posting from your inbox
2. Click the **Applicant tab**
3. Click the applicant's **last name**
4. Hover over **Take Action on Job Application** and update status to **Interviewed Not Hired**
5. Enter **Reason Code**
6. Click **Submit**

Repeat for all applicants that are not selected for hire. At this point, each applicant will receive an email that they are no longer under consideration for the position. For more information on applicant statuses, see **Rating Applicants Job Aid**.

Quick Reference Guide: Initiating a Hiring Proposal (Faculty) QRG

Instructions: Use this quick reference guide to help you initiate the hiring proposal (HP) and hiring process. A Hiring Proposal needs to be completed after a candidate has been selected for hire. To complete this process, see **Completing a Hiring Proposal QRG**.

Step 1: Select a Candidate for Hire

In order to initiate a hiring proposal, an applicant status must be updated to "Selected for Hire". To do this, follow the steps below:

1. Open the posting from your inbox
2. Click the **Applicant tab**
3. Click the applicant's **last name**
4. Hover over **Take Action on Job Application** and update status to **Selected for Hire**
5. Click **Start Hiring Proposal** and move to S**tep 2**

Step 2: Initiate the Hiring Proposal

To initiate the hiring proposal for the applicant, follow these steps:

1. Type in Faculty/Other Position Title (e.g. Faculty or Assistant Professor – Animal Science).
2. Select the Primary Employing Division, College/Unit, and Department from the available dropdown menus.
3. Click Start Position Requests.

Step 3: Complete Required Fields

Fill in the required fields of the Hiring Proposal. Completed sections will be denoted by a blue checkmark next to the section title in the menu on the left. Use the table below to complete the forms and fields:

Hiring Proposal	
Applicant Information	
Fist Name	First name and Middle name are populated from the application.
Middle Name	
Last Name	Enter in the last name of the applicant. This is not populated in case the last name may have changed since first applying.

Quick Reference Guide: Initiating a Hiring Proposal (Faculty) QRG

Address	Mailing Address of the candidate.
City	
State	
Zip Code	
Country	
Country Code	
Primary Contact Phone	Contact Information of the Candidate.
Email	
Position Information	
Hiring Proposal Number	Automatically generated after the hiring proposal is routed.
Working Title	Generated from the posting.
University Title	
*Faculty/Other Position Title	Choose a title from the dropdown menu.
Appointment Type	Generated form the posting.
Base of Employment	
Number of Months Employed Per Year	
Fraction	
*Employment Start Date	Declare an official start date for the applicant. The eLOI will use this date as the start date.
Employment End Date	Enter a date for Term or less than 12 months.
Have you completed required reference checks?	Yes/No. If no, UHR will route back to Posting Admin before approving the Hiring Proposal.
Number of Positions	Generated from the posting.
Supervisor Name	
Supervisor Email	
User Group Assignment	
Will this position supervise Merit or P&S staff?	Yes/No
User Group Assignment – Hiring Manager	If they will be supervising, select this checkbox to request this person to have access to PDs of direct reports.
User Group Assignment – Dept/Chair or Director	If this position will be a department chair or director, select this checkbox to request this person to manage PDs, postings and applicants.
Departments	Select up to 5 relevant departments by holding down Control.
Salary	
*Proposed Annual Salary	A free text field to enter a specific salary (e.g. $45,956) or a range ($43,000-47,000).
Rationale for salary if above	If the salary is above the hiring range, be sure to seek

Quick Reference Guide: Initiating a Hiring Proposal (Faculty) QRG

hiring range	appropriate approvals outside of the system.
Special Conditions for system-generated LOI.	Information entered here will not populate the electronic Letter of Intent (eLOI) in AccessPlus which will be implemented later this year.
Funding (One Entry Required)	
*Account	7 digits, no dashes
Sub-Account	Optional: 6 digits, no dashes
*Account # % (1-100)	Enter percentage
Hiring Proposal Documents	
Enter documents here regarding outside approvals or documents you would like to be attached to this HP record.	
Offer Accepted and Recruitment	
*This section will be completed during the **completing a hiring proposal** process.*	
Social Security Number	Enter the candidate's Social Security number.
University ID Number	Enter in the University ID Number of the candidate.
Posting Number	Automatically generated from the Posting.
First and Last Name of Person Confirming Hire	Enter First /Last name here.
Date Hire Confirmed	Enter the date the hire was confirmed.
Recruitment/Advertisement confirmation	
Please List the Recruiting resources that were actually used to advertise this position. This information is vital for the ISU Affirmative Action Plan. For your convenience, the recruiting resource you intended to use when the posting was created can be found below.	Enter the resources you used to advertise this position. Directly underneath is an automatically generated list of all the resources you planned to use. This list was generated from the posting.
List the recruiting resources the department intends to further advertise the posting. The position will automatically be posted on iastatejobs.com and the Iowa Workforce website. Additional advertising is the responsibility of the hiring department.	Prepopulated from the posting.

Quick Reference Guide: Initiating a Hiring Proposal (Faculty) QRG

Indicate which specific website, placement office, trade journal, newspaper or other resource that you intend to use.	Prepopulated from the posting.

Step 4: Route the Hiring Proposal for Approval
The Hiring Proposal will be routed through the workflow for approval. Hover over Take Action on Hiring Proposal and select the appropriate workflow for your organizational structure. After approval, see **Completing a Hiring Proposal QRG**. Use the table below to better understand the available statuses.

Workflow Status	Description
Under Review by Posting Admin Send to Dept. Chair/Director Send to Dean/AVP Submit President / Senior Vice President	The Posting Admin transfers the hiring proposal to the **Dept. Chair/Director** and **Dean/ AVP (depending on organizational structure)** to edit and/or approve the Hiring Proposal. The last approver routes the HP to UHR Recruitment.
Submit to UHR Recruitment (Request to Extend Offer) *As Needed:* Submit to UHR Class & Comp	**UHR Recruitment** reviews the Hiring Proposal. Once the Hiring Proposal is approved, the Hiring Proposal is transferred to the **Approved to Extend Offer** workflow state. For P&S Staff, if the salary proposal is above the hiring salary range then the Hiring Proposal is sent to **UHR Class & Comp** to approve the proposed salary.
Approve to Extend Offer (Posting Admin)	During the **Approved to Extend Offer** workflow status, negotiation with the candidate occurs. This process is done outside of People Admin among the Posting Admin, Hiring Authority and the Candidate. Once negotiations are complete, the Posting Admin must transition the Hiring Proposal to the **Final Verbal Offer Details** workflow state.

Quick Reference Guide: Initiating a Hiring Proposal (Faculty) QRG

Final Verbal Offer Details Offer Declined Offer Accepted confirmed Hire (Posting Admin)	The Letter of Intent (LOI) is sent to the candidate. If the candidate signs the Letter of Intent, the Posting Admin must transition the Hiring Proposal to the **Offer Accepted-send to UHR Finalize Hire** workflow state. If the candidate declines, the posting admin will need to update the status of the applicant and start hiring an alternative (if needed).
Offer Accepted-Send to UHR Finalize Hire	Once the Hiring Proposal has been transitioned to **Offer Accepted-send to UHR Finalize Hire,** the Hiring Proposal is routed to Human Resources. HR will update administrative systems and will begin the new hire process with the employee.

Step 5: Update other Applicants
For applicants that are not selected for hire, update the applicant status. To do this, complete the following steps:

1. Open the posting from your inbox
2. Click the **Applicant tab**
3. Click the applicant's **last name**
4. Hover over **Take Action on Job Application** and update status to **Interviewed Not Hired**
5. Enter **Reason Code**
6. Click **Submit**

Repeat for all applicants that are not selected for hire. At this point, each applicant will receive an email that they are no longer under consideration for the position. For more information on applicant statuses, see **Rating Applicants Job Aid**.

Quick Reference Guide: Completing a Hiring Proposal

Instructions: Use this quick reference guide to help you complete the Hiring Pproposal (HP) and hiring process. A Hiring Proposal needs to be completed by the posting admin after a candidate has been approved by UHR to extend an offer. The posting admin will receive an email when the posting admin can start verbal negotiations with the candidate.

Step 1: UHR Approves to Extend Offer

After UHR approves that an offer can be extended to the candidate, an email will be sent to the Posting Admin. During the **Approved to Extend Offer** workflow status, negotiation with the candidate occurs. This process is done outside of People Admin among the Posting Admin, Hiring Authority and the Candidate.

Step 2: Posting Admin Updates Hiring Proposal Status

Once negotiations are complete and final details are agreed upon, the Posting Admin must transition the Hiring Proposal to the Final Verbal Offer Details workflow state. To do this:

1. Log into PeopleAdmin 7 and target Posting Admin
2. Click Inbox
3. Select the Hiring Proposal tab
4. Click Actions to View the HP
5. Click Edit
6. Update the following:
    a. Negotiated Salary
    b. Start Date
    c. Special Conditions
    d. Recruitment Details
7. Click Hiring Proposal Summary
8. Hover over Take Action on Hiring Proposal and click Final Verbal Offer Details status.

The posting admin is still the owner of this hiring proposal and it is not routed at this time. Next, complete the LOI.

Quick Reference Guide: Completing a Hiring Proposal

Step 3: Create/Distribute LOI (P&S Only)
Using the report feature, you are able to print a Letter of Intent for each candidate within PeopleAdmin7.

1. Log into PeopleAdmin 7 and target Posting Admin
2. Click Inbox
3. Select the Hiring Proposal tab
4. Click Actions to View the HP
5. Click Reports tab and select Letter of Intent

A personalized letter of intent will now be generated. This report is available on the screen after clicking. You can either print this screen or copy/paste into a Word document. Alternatively, the department can use the forms/fields from the HP on the paper template LOI.

Step 4: Update Hiring Proposal Status
At this point, the candidate will either accept the offer or decline the offer.

Scenario A: The Candidate has accepted the offer and signed the LOI

1. Log into PeopleAdmin 7 and target Posting Admin
2. Click Inbox
3. Select the Hiring Proposal tab
4. Click Actions to View the HP
5. Click Edit
6. Insert the Social Security Number in the Offer Accepted and Recruitment section
    a. If you have not already, update Recruitment/Advertisement information for this section
7. Click Hiring Proposal Summary
8. Hover over Take Action on Hiring Proposal and click Offer Accepted-Confirm Hire - send to UHR
9. When all applicants are at a final status and the candidate is the only/final hire on the posting, UHR will transition the posting to “Filled”.

Once the Hiring Proposal has been transitioned to **Offer Accepted-Confirm Hire - send to UHR,** the Hiring Proposal is routed to Human Resources. UHR will update administrative systems and will begin the onboarding process with the new employee. UHR will update the Hiring Proposal Status to HR Finalize Hire. The applicant status will automatically update to **Hired**.

Quick Reference Guide: Completing a Hiring Proposal

If the remaining applicants have not been moved to a final status, the Posting Admin must do so at this time. For more information on applicant statuses and reason codes, please reference the **Rating Applicants Job Aid**.

Scenario B: The Candidate has declined the position
If the candidate has declined the position, follow these steps to complete this Hiring Proposal.

1. Log into PeopleAdmin 7 and target Posting Admin
2. Click Inbox
3. Select the Hiring Proposal tab
4. Click Actions to View the HP
5. Hover over Take Action on Hiring Proposal and click Offer Declined
6. Click the Applicant's name on the Hiring Proposal Summary screen
7. Hover over Take Action on Job Application and select Interviewed Not Hired
8. Enter a Reason Code
9. Click Submit

The posting admin can now initiate a hiring proposal for another applicant if applicable. If further negotiations have taken place, make the appropriate edits to the hiring proposal and re-route for approval.

INDEX: Offer Accepted and Recruitment
Use the text below to guide you in completing the hiring proposal.

Offer Accepted and Recruitment	
Social Security Number	Enter the candidate's Social Security number.
University ID Number	Enter in the University ID Number of the candidate.
Posting Number	Automatically generated from the Posting.
Date Hire Confirmed	Enter the date the hire was confirmed.
Recruitment/Advertisement confirmation	
Please List the Recruiting resources that were actually used to advertise this position. This information is vital for the ISU Affirmative Action Plan. For your convenience, the recruiting resource you intended to use when the posting was created can be found below.	Enter the resources you used to advertise this position. Directly underneath is an automatically generated list of all the resources you planned to use. This list was generated from the posting.

Reference Letter Tool Job Aid

Purpose: The purpose of this Job Aid is to help you understand how to configure the PeopleAdmin 7 **Reference Letter Tool**. This tool is useful if you have multiple applicants in the review stage and need to contact their references efficiently. A **Reference** is a person the candidate indicated on an application to provide a **Recommendation**, which is the response form to be submit to Iowa State University.

For step-by-step instructions on utilizing the Reference Letter Tool, please refer to the Quick Reference Guide.

Configuration and Process

The steps below outline the process of the Reference Letter Tool. This automated process does not replace, but can be used concurrently with telephone reference checks, to gather recommendations for the applicant.

1. Click the **Accept References** box when creating a new faculty posting. This will be located on the first page you view when you begin the process of creating a new posting. If you would like to use references for P&S, contact your UHR representative.

2. Once the **Accept References** box is checked, you will see that some optional choices are made available to you. These include **Reference Notification**, **Recommendation Workflow,** and **Recommendation Document Type.** Use the table below to better understand these options:

Reference Options on Posting Settings	
Reference Notification	This option will determine when the candidate reference(s) will be contacted to provide recommendations for the candidate. This is decided by selecting an appropriate workflow state.
Recommendation Workflow	This option will likely not be used at ISU. The option will determine which workflow state the candidate will be moved to once the recommendations from the reference(s) have been provided.

Reference Letter Tool Job Aid

Recommendation Document Type	This option will determine whether or not the candidate will be required to upload a document when a reference submits a recommendation.

3. Complete the required sections of the posting (**Position Details, Supplemental Questions,** etc.); you will see a section titled **Reference Letters.** Here, you can provide specifications regarding references. Further detailed explanations of all these options can be found in the table below:

Reference Letters Section within Posting	
Accept References	By selecting Yes, the posting's application form will have a reference letter section to be completed by the candidate.
Minimum/Maximum Requests	This will determine how many references the candidate is required to submit with the application. Set the minimum to one, and the maximum to a number of choices.
Cutoff Date	The date indicated will determine when the system will disable the link for the reference to
Provider Special Instructions	Use this option to provide any extra information you want to receive from a reference. This will be sent alongside the email.

4. Continue the workflow process and route the posting for approval based on your organizational structure. When the posting is on the ISU Jobs website, the application will ask the **applicant for references** *(optional/required and minimum/maximum based on the settings configured in step 3).*

5. When the applicant reaches the specified **Workflow State** *(configured in step 2)*, an email will be sent out the candidate's references. The references will fill out a recommendation form and/or attach a recommendation letter within the noted time frame *(configured in step 3)*. See **Providing a Recommendation Process** for more details.

6. The **applicant tab** will be updated with the information and is available for review. See **Viewing Reference's Recommendation** for more details.

Providing a Recommendation Process

Once the reference receives the email, they will give recommendations about the candidate and will be prompted to send the response back to you.

1. At the designed applicant workflow state, an automated email will be generated to the reference. In the email, the reference will be provided with a link to follow. There is also a link to the posting, which is only accessible if the posting is not closed/filled.

Reference Letter Tool Job Aid

2. On the website, the **Applicant Information** will be located on the top of the page. Next, there are required fields for the References to complete, such as name and contact information.

3. Next, the Recommendation section must be completed. Questions to be answered by the reference include:
   a. *Do you decline to provide a referral for this candidate?*
   b. *How Do You Know This Candidate?*
   c. *How Long Have You Known This Candidate?*
   d. *Additional Comments*

4. If required, the reference will upload a **Recommendation Letter**. This document will automatically be converted to PDF form and attached to the applicant's information within the posting.

Viewing Reference's Recommendation
After the applicants recommendations have been sent back, you are able to review the provided information. To do this:

1. Navigate to the **posting** on People Admin and click on **Applicants.** Click the appropriate **Applicant**'s last name.

2. While viewing the **Applicant** information you will see three tabs: **Summary, Recommendations** followed by 2 numbers (for example 1 of 1), and **History.** Click the **Recommendations** tab.

3. You will see **Reference Requests** if an email has been sent out to a reference but either they have not yet responded or there was an issue sending an email. Below **Reference Requests** is where you will see completed **Recommendations.**

INDEX: Automated Emails
In this section you will see the different emails that can be sent out to the Reference. These can be sent when the candidate reaches a certain workflow state, if a reference hasn't responded with recommendations, etc.

Reference Letter Tool Job Aid

Request to Reference for Recommendation

This email is sent to the reference requesting them to submit a recommendation for the applicant:

Hello,

(Applicant First/Last Name) has applied for the position of (Posting Title/Dept). You were listed in the application as a provider of a letter of recommendation.

For more information about this position, please refer to the position information below or visit: (URL)

Instructions for submitting your letter of recommendation:
1) Please visit the (URL)If you are unable to click this link, please copy and paste the link below, with no spaces, into your browser address bar. (URL)
2) On the recommendation submission webpage, enter your name, institution, email and how you know the candidate.
3) Click Next at the bottom of the page.
4) On the following page, click Add Recommendation Letter (red text) and upload your document. The system will then automatically convert your document to PDF. This may take a few minutes.
5) Click Next and finalize.

Special Instructions from hiring department: (Special Instructions)

Position Information:
(Position Title/Dept)

Thank you,
University Human Resources
Iowa State University

Reference Letter Tool Job Aid

Reference Request Reminder

If the reference has not responded with recommendations, this email will be sent out as a reminder to complete the request:

Hello,

(Applicant First/Last Name) has applied for the position of (Posting Title/Dept). You were listed in the application as a provider of a letter of recommendation.

This is the last chance to provide the recommendation for this candidate. Please click the link below and fill out the information and/or upload the documents requested.

For more information about this position, please refer to the position information below or visit: (URL)

Instructions for submitting your letter of recommendation:
1) Please visit the (URL)If you are unable to click this link, please copy and paste the link below, with no spaces, into your browser address bar. (URL)
2) On the recommendation submission webpage, enter your name, institution, email and how you know the candidate.
3) Click Next at the bottom of the page.
4) On the following page, click Add Recommendation Letter (red text) and upload your document. The system will then automatically convert your document to PDF. This may take a few minutes.
5) Click Next and finalize.

Special Instructions from hiring department: (Special Instructions)

Position Information:
(Position Title/Dept)

Thank you,
University Human Resources
Iowa State University

Reference Letter Tool Job Aid

Reference Confirmation (Applicant)

Once the reference has completed the recommendation, the following email will be sent out to the candidate:

Dear (Applicant First Name/Last Name)

This is to inform you that we have received a response from one of your references for your application to the (position title/Dept.) position with Iowa State University. The search committee is in the process of reviewing applicants and you will be notified if selected for further consideration.

Thank you,
University Human Resources
Iowa State University

Reference Confirmation (Reference)

The following email will be sent out to the reference once they have submitted the recommendation:

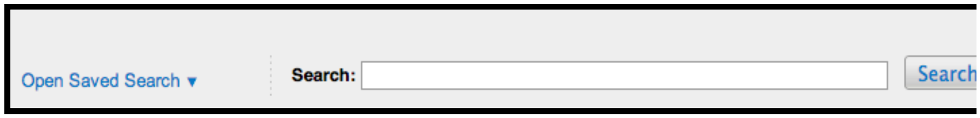
We have received your reference for a candidate who has applied for the (Position Title/Dept.) position at Iowa State University. Thank you for completing this information. We can now continue with the review of this candidate, incorporating the valuable information provided!

Thank you,
University Human Resources
Iowa State University

Quick Reference Guide: Saving a PeopleAdmin 7 Search

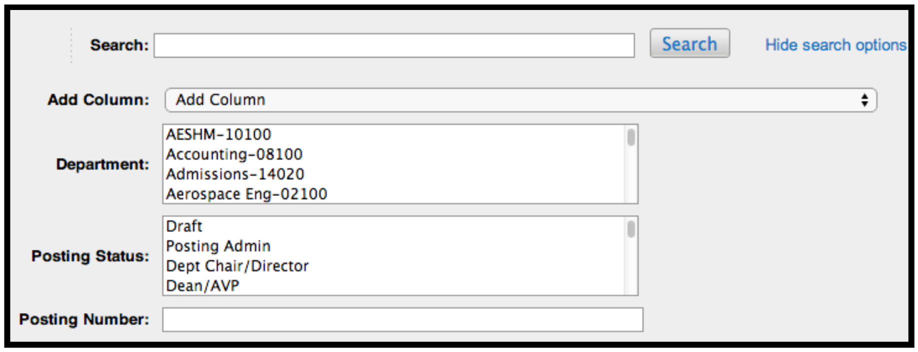
Instructions: Use the following steps to save a search. Searches are useful to limit or expand the amount of results within a position type. Every page that presents a list of items also provides search tools to help you find what you're looking for.

1. **Type** a search query in the search field.

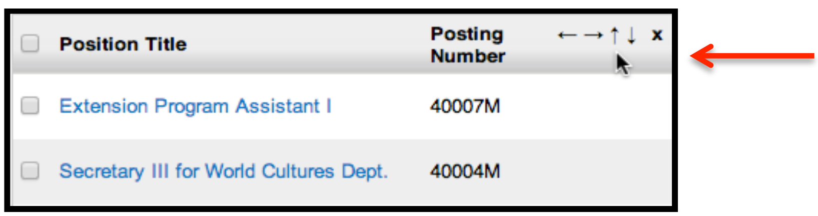


Note: Text search is not case sensitive***.***

2. Define a search by **adding or removing columns** from the posting or position description.

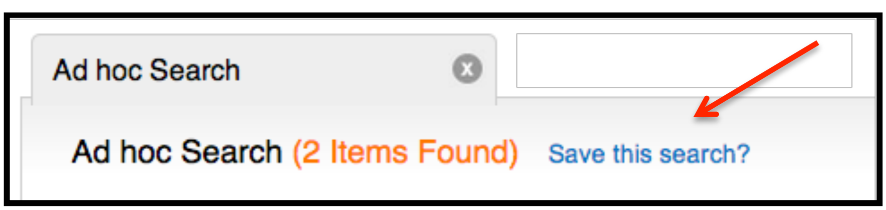


3. **Sort** the position of columns by clicking on the arrows that appear when **hovering over** the column name.



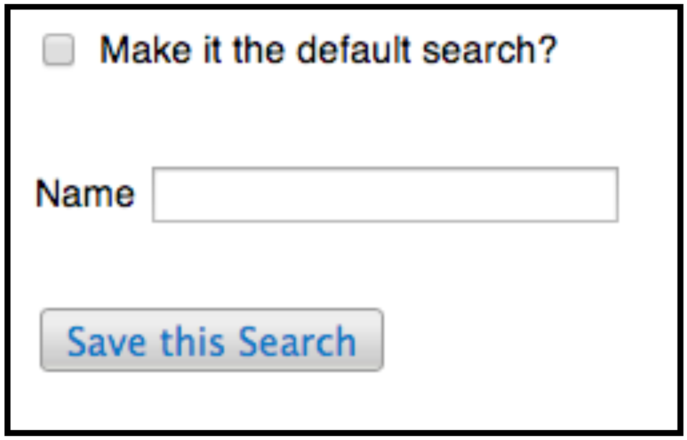
Right or Left Arrows: rearrange the columns.
Up or Down Arrows: Change the sort to ascending or descending.

4. Click **save this search** to retain the search criteria and table format.

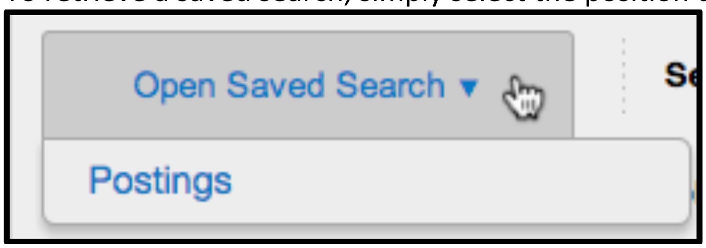


Quick Reference Guide: Saving a PeopleAdmin 7 Search

5. **Name** the search and select whether it is saved as the default search for the position type.



To retrieve a saved search, simply select the position type and choose to **Open Saved Search**:



To **remove** or **delete** a saved search you have saved, click the gray “X” (*as shown below*):

Routing and Approvers in PeopleAdmin 7

Routing in PeopleAdmin 7 (PA7)						
When I receive an action for the noted position type, I should route to…	**New PD**	**Modify PD**	**New Posting**	**Posting Please Review**	**Interview Approval**	**Hiring Proposal**
	Hiring Manager=PD side **ONLY**		**Posting Admin**=Posting side **ONLY**			
Merit						
Merit Temporary						
P&S						
P&S Temporary/Emergency						
Faculty/Other						

Notes / Special Circumstances:

People In PA7 Approver Groups					
Dept Chair/Director	**Dean/AVP**	**President/Senior VP**	**HR Liaison**	**UHR Recruitment Representative**	**UHR Class/Comp Representative**
			*All actions must be approved by the HR Liaison and submit to UHR.		
Proxy:	Proxy:	Proxy:			

Notes / Special Circumstances:

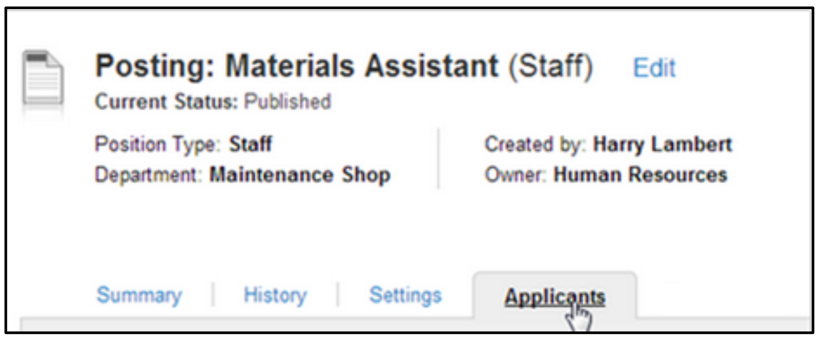
Reviewing Applicant Materials

Purpose: PeopleAdmin7 (PA7) configures a user profile for each employee at the University. Use this guide to better understand what information is available and how you can personalize PA7.

View Applicants

To access applications for a posting, follow the steps below:

1. Log into PeopleAdmin 7 with your **ISU Net ID and Password**
2. Hover over **Postings** and click the appropriate **position type**
3. **Locate** and open the posting
4. Click the **Applicant** tab



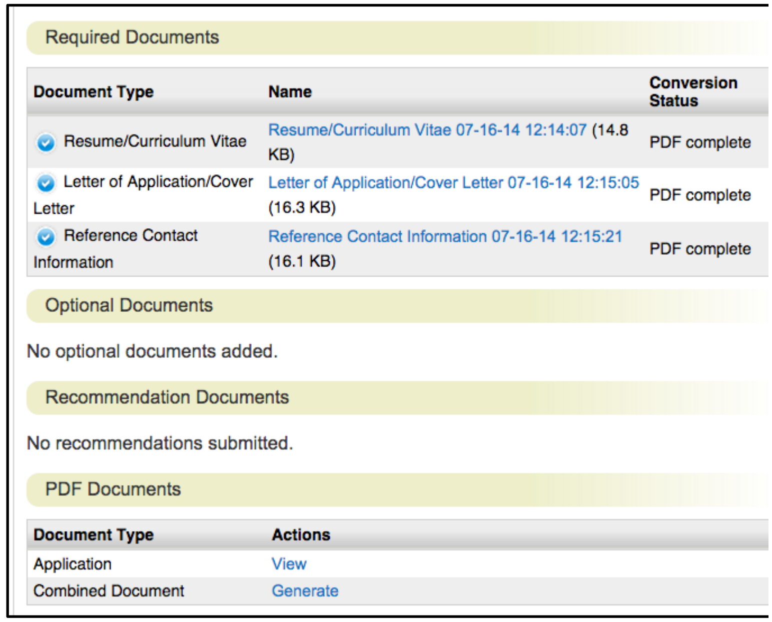
This page will show applicants, based on the current search. Reference **Saving Searches in PeopleAdmin7** for more information.

Reviewing Applicant Materials

View An Applicant’s Materials Individually

To access applications for a posting, follow the steps below:

1. Click the **Applicant’s name**
2. Scroll to the **bottom** of the Job Application
3. Click the **necessary documents to open**
4. **Generate** (available for PDF download) or **View** (opens materials in the web browser) the following:
    a. **Application**: Job Application PDF
    b. **Combined Document**: Job Application and all applicant documents as a PDF



Required Documents

Document Type	Name	Conversion Status
Resume/Curriculum Vitae	Resume/Curriculum Vitae 07-16-14 12:14:07 (14.8 KB)	PDF complete
Letter of Application/Cover Letter	Letter of Application/Cover Letter 07-16-14 12:15:05 (16.3 KB)	PDF complete
Reference Contact Information	Reference Contact Information 07-16-14 12:15:21 (16.1 KB)	PDF complete

Optional Documents

No optional documents added.

Recommendation Documents

No recommendations submitted.

PDF Documents

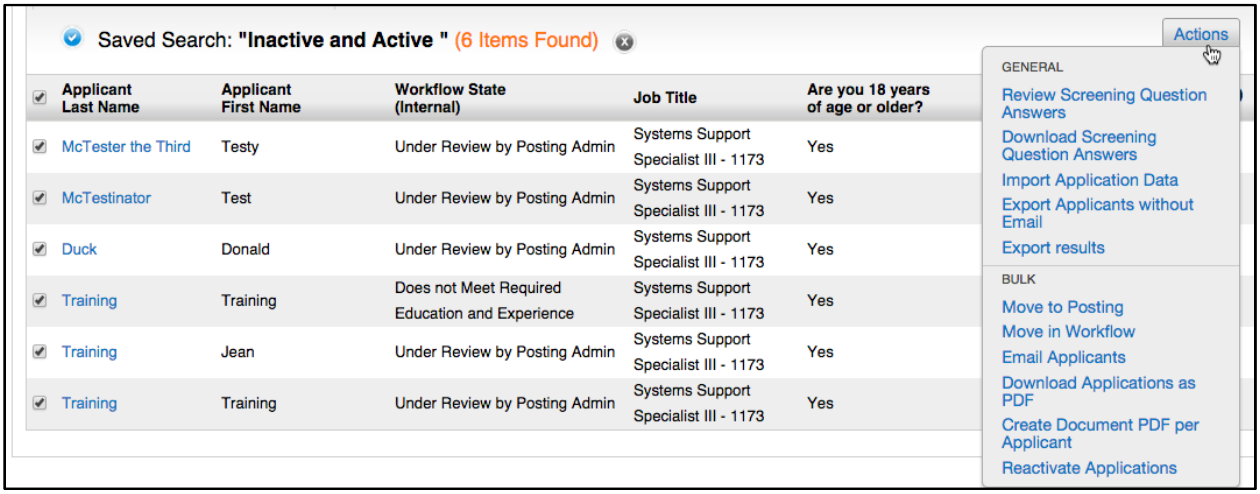
Document Type	Actions
Application	View
Combined Document	Generate

View An Applicant’s Documents Collectively

You can review more than one applicant document at a time. You may choose to view all the documents for an applicant, specific applicant documents for each of a group of applicants, or all applicant documents for a group of applicants.

1. Check the boxes to select the **applicant** or applicants of interest, on the posting’s **Applicants tab**
2. Choose one of the following:
    a. Create 1 PDF of selected applicants' materials together:
        i. Click Actions, Download Applications as PDF
        ii. Select the types of documents you want to view and click Submit
    b. Create multiple PDFs of selected applicants’ materials:
        i. Click Actions, Create Document PDF per Applicant

Reviewing Applicant Materials



Saved Search: "Inactive and Active " (6 Items Found)

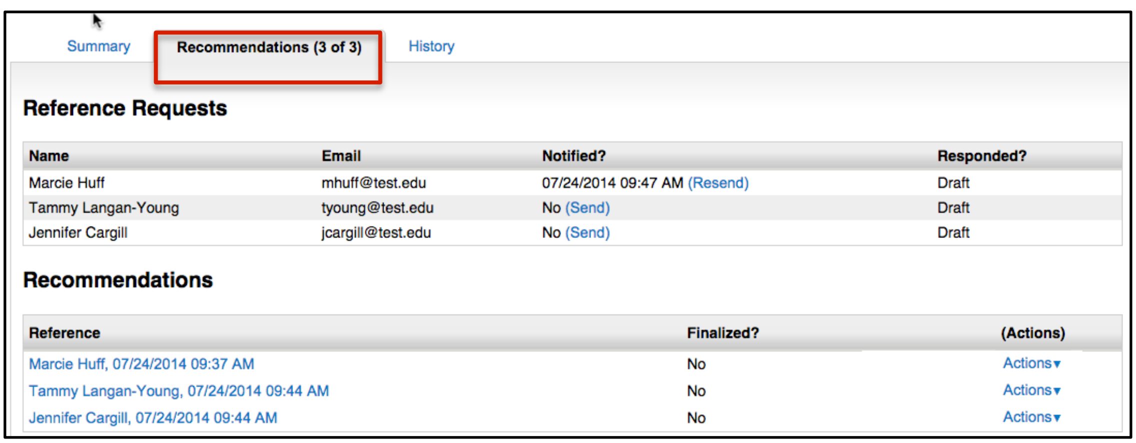
Applicant Last Name	Applicant First Name	Workflow State (Internal)	Job Title	Are you 18 years of age or older?
McTester the Third	Testy	Under Review by Posting Admin	Systems Support Specialist III - 1173	Yes
McTestinator	Test	Under Review by Posting Admin	Systems Support Specialist III - 1173	Yes
Duck	Donald	Under Review by Posting Admin	Systems Support Specialist III - 1173	Yes
Training	Training	Does not Meet Required Education and Experience	Systems Support Specialist III - 1173	Yes
Training	Jean	Under Review by Posting Admin	Systems Support Specialist III - 1173	Yes
Training	Training	Under Review by Posting Admin	Systems Support Specialist III - 1173	Yes

The system creates a PDF(s) containing all the documents that you request. Save this PDF and distribute to the search committee.

View An Applicant's Letters of Reference (Faculty/Other Only)

To view uploaded letters of reference (or recommendation), complete the following steps:

1. View the **application**
2. Open the **Recommendations tab** to see a list of recommendations from the applicant's reference providers
3. Select the **recommendation of interest** to view it in detail



Reference Requests

Name	Email	Notified?	Responded?
Marcie Huff	mhuff@test.edu	07/24/2014 09:47 AM (Resend)	Draft
Tammy Langan-Young	tyoung@test.edu	No (Send)	Draft
Jennifer Cargill	jcargill@test.edu	No (Send)	Draft

Recommendations

Reference	Finalized?	(Actions)
Marcie Huff, 07/24/2014 09:37 AM	No	Actions▾
Tammy Langan-Young, 07/24/2014 09:44 AM	No	Actions▾
Jennifer Cargill, 07/24/2014 09:44 AM	No	Actions▾