How to Review and Approve Applicant Interview and Hire Requests
Equal Opportunity Coordinators (EOC’s) work closely with the Office of Equal Opportunity to make sure that all searches are conducted in a fair and equitable manner. EOC’s also review and approve rationale in the TMS for why applicants will or will not be progressing in a search.

The following guide will show EOC’s how to log in to the system to review proposed applicants for Semifinalist Interviews, Finalist Interviews and the applicant(s) who is/are Recommended for Hire (EOC’s will also review and approve the ‘Faculty Review’ workflow state for Faculty Searches).

The following slide indicates how the rationale detail should increase as the search progresses.
1. The rationale at this point can be very general. You may use the options from the drop down menu to explain why a candidate has or has not moved forward.

2. Rationale must be more descriptive at this stage. Must identify why candidates rose above the rest to progress to an interview as well as why the other applicants are either on hold or are no longer under consideration.

3. Must clearly demonstrate the decision making process for top candidate choice(s). Why is each candidate either offered a position, on hold, or no longer under consideration?

Note: As the search progresses and the applicant pool decreases, the rationale should increase, reflecting the decision making throughout the process.
Approving Applicants as an EOC Flowchart

1. Applicant Manager
   - Request Semifinalist Interview

2. EO Coordinator
   - Review and Approve Semifinalist Interview

3. OEO
   - Review and Approve Semifinalist Interview (Faculty searches only)

   - Email trigger sent to the EO Coordinator
   - Email trigger sent to the Applicant Manager
   - Email trigger sent to the Hiring Authority

4. Applicant Manager
   - Request Finalist Interview

5. EO Coordinator
   - Review and Approve Finalist Interview

6. Hiring Authority
   - Start Hiring Proposal

7. OEO
   - Review and Approve Recommend for Hire

8. EO Coordinator
   - Review and Approve Recommend for Hire

   - Request Recommend for Hire

   - Email trigger sent to the EO Coordinator
   - Email trigger sent to the Applicant Manager
   - Email trigger sent to the Hiring Authority

Colorado State University
Email example sent to EOC’s when action is needed

Hello, Emily Rogers,

Ashlei Tobin-Robertson has been placed in the Request Semifinalist Interview - EOC status for the Coordinator for Student Engagement and Leadership position.

Please follow the link below and click on the ‘Applicants’ tab to review and approve the request for Ashlei Tobin-Robertson.

[http://colostate-training.peopleadmin.com/hr/postings/31914](http://colostate-training.peopleadmin.com/hr/postings/31914) **Be sure you are logged in under the correct user group so that the direct link will work**

Note: Each email will provide a direct link to the posting where the EOC can then select the ‘Applicants’ tab from the top of the page to be taken straight to the applicant pool.

Note: Each email will also include a link to this training guide.

Note: Every time an applicant is moved into a workflow state ending in ‘EOC’, the EO Coordinator will receive an email from the system alerting them that an applicant has now been placed in their ‘ownership’ and that they must log in to the system to complete the review and approval or send it back to the Applicant Manager if not enough rationale for the progression was provided.

The EOC will receive a separate email for each individual moved. i.e. if the Applicant Manager moves 5 applicants into an EOC owned workflow state, the EOC will receive 5 separate emails.

Position #: 015423.0002
Posting #: 201600245AP
Department: Residence Life

Thank you,
Office of Equal Opportunity
oeo@colostate.edu
970-491-5836
1. Log into the TMS at [https://jobs.colostate.edu/hr](https://jobs.colostate.edu/hr).

2. Select the blue, ‘Applicant Tracking’ module and ‘EO Coordinator’ user role.

3. From the ‘Postings’ tab, select either ‘Admin Professional/Research Professional’ or ‘Faculty’ from the drop down menu.
1. Select the posting from the list below, or enter in the Posting Number in the search bar to find the exact posting then click on the Working Title.

Shortcut: Hover over ‘Actions’ and select ‘View Applicants’ to be taken directly to the ‘Applicants’ tab within the posting.
1. Click on the ‘Applicants’ tab.

Note: If you clicked on the working title, you will be taken to the posting’s ‘Summary’ tab.
1. Once in the 'Applicants' tab, hover your cursor over 'Saved Searches' and select '(Group) – EOC Applicant Spreadsheet'.
1. If you want to export these results to an Excel Spreadsheet, hover your cursor over the 'Actions' button and select 'Export Results'.

Note: The ‘EOC Applicant Spreadsheet’ saved search is an extremely useful tool. It helps the EOC quickly review rationales for those who are and are not moving forward in the search process. It pulls in both ‘active’ and ‘inactive’ applicants, displays their rationales in the column titled ‘Workflow State Entrance Reason’, and groups together workflow states for easier and quicker review.

Note: This column shows what workflow state the applicant is currently in.

Note: This column shows the rationale for each applicant.
Approving All Semifinalist Interview Requests in ‘Bulk’

1. After you have reviewed the rationale for all applicants, both for those moving forward in the process and not moving forward in the process, and you are ready to approve the interview requests, hover over ‘Saved Searches’ and select ‘Bulk Move Option Missing (for EO Coordinators)’. 

Note: By utilizing the ‘Bulk Move Option Missing’ saved search, now only applicants in EO Coordinator ‘owned’ workflow states will appear in the list below. Narrowing down the applicant list to only those in EO Coordinator owned workflow states will allow you to approve the requests in ‘Bulk’. 
### Approving All Semifinalist Interview Requests in ‘Bulk’

1. To approve all interview requests in ‘Bulk’, check the top box to select all applicants on the page.

<table>
<thead>
<tr>
<th>First Name</th>
<th>Last Name</th>
<th>Posting Number</th>
<th>Workflow State (Internal)</th>
<th>Application Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jordyn</td>
<td></td>
<td>201800245AP</td>
<td>Request Semifinalist Interview - EOC</td>
<td>March 31, 2016 at 09:59 PM</td>
</tr>
<tr>
<td>Hailey</td>
<td></td>
<td>201800245AP</td>
<td>Request Semifinalist Interview - EOC</td>
<td>April 03, 2016 at 04:32 PM</td>
</tr>
<tr>
<td>Ashlei</td>
<td></td>
<td>201800245AP</td>
<td>Request Semifinalist Interview - EOC</td>
<td>April 05, 2016 at 03:32 PM</td>
</tr>
<tr>
<td>Monique</td>
<td></td>
<td>201800245AP</td>
<td>Request Semifinalist Interview - EOC</td>
<td>April 17, 2016 at 12:25 PM</td>
</tr>
<tr>
<td>Denise</td>
<td></td>
<td>201800245AP</td>
<td>Request Semifinalist Interview - EOC</td>
<td>April 17, 2016 at 12:25 PM</td>
</tr>
<tr>
<td>Stephanie</td>
<td></td>
<td>201800245AP</td>
<td>Request Semifinalist Interview - EOC</td>
<td>April 17, 2016 at 12:25 PM</td>
</tr>
</tbody>
</table>

2. Hover your cursor over the orange ‘Actions’ button and select ‘Move in Workflow’ from the ‘Bulk’ submenu.
1. To approve all requests at once (moving everyone into the same workflow state), select a workflow state transition option from the top drop-down menu. Selecting from the top drop-down menu will subsequently update the drop-down menus next to each individual's name below. Note: You can also update applicant workflow states individually by selecting a workflow state transition option next to an applicant's name. You may need to do this if you are sending a candidate back to the Applicant Manager to request more rationale. Ensure you select a 'Reason' from the right side drop-down menu and also provide a brief 'Explanation'. If you return a candidate to the Applicant Manager they will receive a notification from the system asking them to make an update.

2. When ready, select 'Save Changes'.

Save changes
Note: Once the semifinalist interview request have been approved, the Applicant Manager will receive an email from the system. The search committee can then begin scheduling semifinalist interviews with the approved candidates. For now, there are no further actions required by the EO Coordinator.
Reviewing All Rationales Before Approving Requests

Note: After the committee has conducted their semifinalist interviews and they are ready to request finalist interviews, they will move candidates into the workflow state ‘Request Finalist Interview – EOC’. At this point the system will send an email to the EOC prompting you to log back into the posting to review and approve the requests.

1. Navigate to the ‘Applicants’ tab in the posting and select ‘EOC Applicant Spreadsheet’ from the ‘Saved Searches’ drop-down menu.
1. Review the rationales for all candidates to ensure that those moving forward and not moving forward have adequate justification.

2. When you are ready to approve the finalist interview requests, hover over 'Saved Searches' and select 'Bulk Move Option Missing (for EO Coordinators)'.

Posting: Coordinator for Student Engagement and Leadership (Admin Professional/Research Professional)

Current Status: Closed

Position Type: Admin Professional/Research Professional
Owner: OEO
Department: Residence Life (8032)
Approving All Finalist Interview Requests in ‘Bulk’

1. To approve all interview requests in ‘Bulk’, check the top box to select all applicants on the page.

2. Hover your cursor over the orange ‘Actions’ button and select ‘Move in Workflow’ from the ‘Bulk’ submenu.
Approving and Moving All Finalist Interview Requests in ‘Bulk’ to OEO

1. To approve all requests at once (moving everyone into the same workflow state), select a workflow state transition option from the top drop-down menu. Selecting from the top drop-down menu will subsequently update the drop-down menus next to each individual’s name below.

Note: You can also update applicant workflow states individually by selecting a workflow state transition option next to an individual’s name. You may need to do this if you are sending a candidate back to the Applicant Manager requesting more rationale. Ensure you select a ‘Reason’ from the right side drop-down menu and also provide a brief ‘Explanation’. If you return a candidate to the Applicant Manager, they will receive a notification from the system asking them to make an update.

2. When ready, select ‘Save Changes’.

Save changes
Cancel
Approving and Moving All Finalist Interview Requests in ‘Bulk’ to OEO

Note: Once the finalist interview requests have been approved by both the EO Coordinator and OEO, the Applicant Manager will receive an email from the system. The search committee can then begin scheduling finalist interviews with the approved candidates. For now, there are no further actions for the EO Coordinator in the system.
Reviewing All Rationales Before Approving Requests

Note: After the committee has conducted their finalist interviews and the Hiring Authority has made their selection, the Applicant Manager will move candidates into the workflow state ‘Recommend for Hire - EOC’ and potentially ‘Recommend for Hire Alternate – EOC’. At this point the system will send an email to the EOC prompting you to log back into the posting to review and approve the requests.

1. Navigate to the ‘Applicants’ tab in the posting and select ‘EOC Applicant Spreadsheet’ from the ‘Saved Search’ drop-down menu.
Reviewing All Rationales Before Approving Requests

1. Review the rationales for all candidates to ensure that those moving forward and not moving forward have adequate justification.

2. When you are ready to approve the hire requests, hover over ‘Saved Searches’ and select ‘Bulk Move Option Missing (for EO Coordinators)’.
Approving Hire Requests in ‘Bulk’

Posting: Coordinator for Student Engagement and Leadership (Admin Professional/ Research Professional)
Current Status: Filled
Position Type: Admin Professional/ Research Professional
Created by: [Blank]
Department: Residence Life (8032)

1. To approve all hire requests in ‘Bulk’, check the top box to select all applicants on the page.

<table>
<thead>
<tr>
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<td>20160245AP</td>
<td>Recommend for Hire - EOC</td>
<td>April 17, 2016</td>
</tr>
<tr>
<td>Stephanie</td>
<td></td>
<td>20160245AP</td>
<td>Recommend for Hire Alternate - EOC</td>
<td>April 17, 2016</td>
</tr>
</tbody>
</table>

2. Hover your cursor over the orange ‘Actions’ button and select ‘Move in Workflow’ from the ‘Bulk’ submenu.
1. Update each candidate’s workflow state individually by selecting the appropriate workflow state option in the drop-down menu next to their names.

2. When ready, select ‘Save Changes’.
Note: Once the hire requests have been approved by both the EO Coordinator and OEO, the Hiring Authority will receive an email from the system alerting them that their hire request has been approved and they can now extend a verbal offer, contingent on a background check, to the successful candidate and start the hiring proposal. At this point, all EO Coordinator approvals are complete in the system.
Need further help?

Please visit the OEO website for more resources on the CSU Talent Management System (TMS) at:

www.oeo.colostate.edu/talent-management-system-tms

For additional help, contact the Office of Equal Opportunity at:
(970) 491-5836
or
email OEO at oeo@colostate.edu