CSU Talent Management
User Guide – EO Coordinator (EOC)
How to Review and Approve Applicants
Approving Applicants as an EOC

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. With new updates in the TMS, the EOC’s are now being inserted into the system to review and approve the rationale for why applicants will or will not be progressing.

The following guide will show EOC’s how to login to the system to review proposed applicants for Semifinalist Interviews, Finalist Interviews and the applicant(s) who is/are Recommend for Hire (EOC’s will also be reviewing and approving 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.
Email trigger sent to the EO Coordinator
Email trigger sent to the Applicant Manager
Email trigger sent to the Hiring Authority
Hello Emily Rogers,

Raymond [redacted] 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 Raymond [redacted].

http://colostate-sb.peopleadmin.com/hr/postings/31914

Be sure to carefully examine the rationale as to why the search committee placed this candidate in the Request Semifinalist Interview - EOC workflow state.

For help with completing this action, please see our EO Coordinator training guide for located [here](#).

Job Title: Coordinator for Student Engagement and Leadership
Position #: 015423.0002
Posting #: 201600245AP
Department: Residence Life

Thank you,

Office of Equal Opportunity
oeo@colostate.edu
970-491-5836

If you have an issue or questions please see our training website at [http://oeo.colostate.edu/talent-management-system-tms](http://oeo.colostate.edu/talent-management-system-tms) or complete a help ticket at [http://oeo.colostate.edu/tms-help](http://oeo.colostate.edu/tms-help).
1. Log into TMS at https://jobs.colostate.edu/hr/login and navigate to the ‘blue’ ‘Applicant Tracking’ side.

2. Hover your cursor over ‘Posting’ tab and select ‘Admin Professional - Research Professional’ or ‘Faculty’.

Note: Be sure your current user group is ‘EO Coordinator’
Approving Applicants as an EOC

1. Select the posting from your list below, or enter in the Posting Number in the search bar to find the exact posting.

Shortcut: You can hover over ‘Actions’ and select ‘View Applicants’ to be taken straight to the Applicants tab.
1. Select the ‘Applicants’ tab.
1. Once on the ‘Applicants’ tab, hover your cursor over ‘Saved Searches’ and select ‘(Group) – EOC Applicant Spreadsheet’
1. If you wish to export these results to an Excel Spreadsheet, hover your cursor over the ‘Actions’ button and select ‘Export Results’.

Note: This ‘Saved Search’ was created so the EOC could view the search committee’s rationale for why someone did or did not progress further. (See that ‘Workflow State Entrance Reason’ is now a new column).

Note: This column shows what workflow state the applicants are currently in.

<table>
<thead>
<tr>
<th>First Name</th>
<th>Last Name</th>
<th>Workforce Request Number</th>
<th>Job Title</th>
<th>Workflow State (Internal)</th>
<th>Workflow State Entrance Reason</th>
</tr>
</thead>
<tbody>
<tr>
<td>William</td>
<td></td>
<td>201600245AP</td>
<td>Coordinator for Student Engagement and Leadership</td>
<td>Request Semifinalist Interview - EOC</td>
<td>Other; Detailed Rationale</td>
</tr>
<tr>
<td>Tamra</td>
<td></td>
<td>201600245AP</td>
<td>Coordinator for Student Engagement and Leadership</td>
<td>Request Semifinalist Interview - EOC</td>
<td>Other; Detailed Rationale</td>
</tr>
<tr>
<td>Tiffany</td>
<td></td>
<td>201600245AP</td>
<td>Coordinator for Student Engagement and Leadership</td>
<td>Request Semifinalist Interview - EOC</td>
<td>Other; Detailed Rationale</td>
</tr>
<tr>
<td>Shauna</td>
<td></td>
<td>201600245AP</td>
<td>Coordinator for Student Engagement and Leadership</td>
<td>Request Semifinalist Interview - EOC</td>
<td>Other; Detailed Rationale</td>
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<tr>
<td>DaMontae</td>
<td></td>
<td>201600245AP</td>
<td>Coordinator for Student Engagement and Leadership</td>
<td>Request Semifinalist Interview - EOC</td>
<td>Other; Detailed Rationale</td>
</tr>
</tbody>
</table>
Approving *Multiple* Applicants for Semifinalist Interviews

1. To move multiple applicants in ‘bulk’ (approving all requests at once) you will need to create a search that pulls only the applicants in the ‘Request Semifinalist Interview – EOC’ workflow state. To do this, select the ‘More Search Options’ button to drop down the detailed search bar.

2. Select ‘Request Semifinalist Interview – EOC’ from the workflow state drop down menu. Then click ‘Search’

Note: If there is enough rationale for why the committee selected these candidates for Semifinalist Interview then you can approve the requests.
Approving *Multiple* Applicants for Semifinalist Interviews

1. Review rationale

2. Check the boxes next to the applicants you wish to move in bulk (approve all at once)

Shortcut: Checking the box that sits above all the names will check every available box.

3. Hover your cursor over the 'Actions' button and select 'Move in Workflow' from the 'Bulk' submenu.

Note: Now you are only viewing the applicants in the 'Request Semifinalist Interview – EOC' workflow state.
1. You can move (approve) every applicant at once, (moving everyone into the same workflow state) by selecting ‘EOC Approved Semifinalist Interview’ from the top drop down menu.

2. You can also move (approve or not approve) each applicant independently. You will need to do this if you are sending an applicant back to the Applicant Manager. Be sure to provide a reason at this time why the applicant is not being approved.

3. Select ‘Save Changes’
Note: After you have reviewed and approved the selected candidates, the Applicant Manager will be the new owner of the applicant and there will be no further action for you to take until the committee requests Finalist Interviews.
Finding and moving **multiple** Applicants for Review and Approval (finalist interview)

Note: When the committee has narrowed down their choices and have requested Finalist Interviews, the EOC will log back into the posting and Review and Approve those applicants who are and are not progressing.

1. To move multiple applicants in ‘bulk’ (approving all requests at once) you will need to create a search that pulls only the applicants in the ‘Request Finalist Interview – EOC’ workflow state.
   To do this, select the ‘More Search Options’ button to drop down the detailed search bar.

2. Select ‘Request Finalist Interview – EOC’ from the workflow state drop down menu. Then click ‘Search’
Finding and moving *multiple* Applicants for Review and Approval (finalist interview)

1. Review rationale

Note: Only the applicants who are in the workflow state ‘Request Finalist Interview – EOC’ are visible.

2. Check the box on top to select all the applicants.

3. Hover your cursor over the ‘Actions’ button, then select ‘Move in Workflow’ from the ‘Bulk’ submenu.
Approving Applicants for Finalist Interview – Move to OEO

1. You can move (approve) every applicant at once, (moving everyone into the same workflow state) by selecting ‘EOC Approved Finalist Interview’ from the top drop down menu.

2. You can also move (approve or not approve) each applicant individually. You will need to do this if you are sending an applicant back to the Applicant Manager. Be sure to provide a reason at this time why the applicant is not being approved.

3. Select ‘Save Changes’
Note: OEO is now the owner of these applicants and will review and approve these requests. When OEO has thoroughly reviewed the rationale and accepts the reasoning, they will be approved. The committee will be able to start scheduling on-campus interviews.
Finding and Approving the Applicant(s) Recommend for Hire

- To view the applicant(s) the search committee wishes to hire, select ‘More Search Options’ to drop down the detailed search menu. Scroll through the ‘Workflow State’ menu until you find the workflow state ‘Recommended for Hire – EOC’ and select it.

- Click ‘Search’

Note: Once the search committee has selected the applicant(s) they wish to hire, they will send their Recommend for Hire to the EOC with detailed rationale for why the candidate(s) was/were selected.

As an EOC you may also need to review and approve applicants place in the ‘Recommended for Hire – Alternative’ workflow state.
Approving the Applicant(s) for Recommend for Hire

1. To review and approve the applicant(s), select the applicant’s first name.
Approving the Applicant(s) for Recommend for Hire

Note: Once you are satisfied with the committee’s rationale, you can move the Recommend for Hire onto OEO for final review and approval.

1. Hover over the ‘Take Action on Job Application’ button and select ‘Recommend for Hire – OEO (move to Recommend for Hire OEO)’

2. Click ‘Submit’
Approved Recommend for Hire

You are now viewing the system as a member of the Hiring Authority group.

Note: Once OEO reviews and approves the Recommend for Hire, the Hiring Authority will receive an email notification and will be able to log into the system and start the Hiring Proposal for the selected applicant(s).

Job application: William (Admin Professional - Research Professional)

Current Status: Approved Recommend for Hire
Application form: Administrative Professional - Standard Application Materials

Full name: William
Address:
Username:
Email: emailaddress@zed.zed
Phone (Primary): 1234567890
Phone (Secondary): 0987654321
Position Type: Admin Professional - Research Professional
Department: Residence Life (8032)

Created by: William
Owner: Applicant Manager
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

Fill out a TMS Help Form