CSU Talent Management System
User Guide – Admin/Research Professional
How to Initiate and Complete the Hiring Proposal

Last Updated: 12/4/2017
Hiring Proposals are created to connect an identified candidate to an open position needing to be filled. Once an applicant has been placed in the ‘Approved Recommend for Hire’ workflow state by OEO, a Hiring Proposal can be initiated. Creating the Hiring Proposal and sending it through the approval process will initiate the background check. All background checks must be completed or waived by HR prior to sending out a formal Offer Letter.

Hiring Proposals may only be created by an individual with the Hiring Authority role in the TMS.

**Important note for Hiring Authorities** - You must be listed as the Hiring Authority on both the position description and posting in order to create the hiring proposal for a posting.

Below are the steps in the initiation, background check, review and approval of the Hiring Proposal.

The steps in the following slides explain how to initiate/complete all requirements for the Hiring Proposal.
Note: Departments wishing to hire Foreign Nationals must first contact Business and Financial Services to obtain a Payroll Control Number (PCN) in order to complete the Hiring Proposal.

Contact: Business and Financial Services, Foreign Tax Office

bfs_foreigntax@Mail.Colostate.edu

Once the PCN has been assigned, enter the number in the “Please Provide Any Background Check Detail” field in the Hiring Information Section under the Hiring Proposal tab.
1. Select the 'Applicant Tracking' module and 'Hiring Authority' user group.

2. Hover over the 'Postings' menu. Select 'Admin Professional/Research Professional'.

Note: If you are have already started the Hiring Proposal, it can be found under the 'Hiring Proposal' menu.
1. Locate the posting for which you wish to start the hiring proposal. 

Shortcut: You can hover over the ‘Actions’ button and select ‘View Applicants’ to be taken directly to the ‘Applicants’ tab within the posting.

Note: You can search for the posting by entering the Posting Number into the main search bar.
1. Once in the posting, select the ‘Applicants’ tab.
1. From the 'Applicants' tab, find the individual(s) in the workflow state 'Approved Recommend for Hire' and click on their first name. If you are hiring multiple individuals out of one posting, this process will need to be repeated for each candidate.
1. Once in their job application, click on the green, ‘Start AP Hiring Proposal’ button in the top right corner.
1. The position description that was used to create the posting will automatically be selected from the list below. Confirm that the correct position is selected, then click one of the ‘Select Position Description’ buttons to create the hiring proposal.

If the correct position description is not showing up, you may not be listed as the Hiring Authority on the approved position description. Please Contact HR to have your name added to the position description.

Note: If you are performing multiple hires out of one posting, each candidate will need to ‘be seated’ into their OWN position description. Selecting the same position descriptions, or one with an individual already seated in it, will cause the system to override the current occupant and replace them with the new individual. Each employee must have their own approved position description and unique position number.
Note: Be sure to fill in all of the highlighted red ‘required’ fields on the ‘Hiring Proposal’ tab. (e.g. Gender, Work Hours, Background Check)

Note: Notice the new ‘Legal First Name’ field. If this field is blank, OEO will copy and paste the ‘Preferred First Name’ into the Legal First Name field before approving the hiring proposal.

1. Please ensure that you have selected the gender of the applicant. If the candidate decided to self disclose their gender when applying, their selection will be directly above the required ‘Hiring Proposal Specific Gender’ drop down menu. Be sure to match this. If they didn’t self disclose, use your best guess estimate and select a gender.
**Position Information**

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<th>Classification Title</th>
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<tr>
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<td>Mid Salary</td>
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<tr>
<td>Max Salary</td>
<td></td>
</tr>
<tr>
<td>Posting Number</td>
<td>201600813AP</td>
</tr>
<tr>
<td>Working Title</td>
<td>Business Process Manager</td>
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<tr>
<td>Position Number</td>
<td>016833.0002</td>
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<td>Salary Range</td>
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<td>12-month assignment</td>
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<td>Employment Category</td>
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**Is this an Hourly position?**

- No

*Hourly positions do not have guaranteed hours and may work within a range of 0-40 hours per week.*

**Work Hours/Week**

- 40

*Please enter a value from 0 – 40 representing the number of work hours per week for this position. If the position is for an hourly employee, please set the work hours to 0.*

**Hiring Authority**

- Rogers, Emily

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**Note:** Continue to fill out the required fields.

1. Work Hours/Week will pull through from the posting. Please remove any hourly ranges. If this is an hourly position, enter 0.
1. Select ‘Yes’ or ‘No’ from the ‘Is Background Check Required?’ field. If you are not certain, add this detail in the ‘Please Provide Any Background Check Detail’ field below.

2. Select ‘Yes’ or ‘No’ from the ‘Is this an Open Pool hire?’ field.

3. When complete, click ‘Next>>’ to continue to the ‘Background Check Requirements’ tab or ‘Save’ to return to complete the Hiring Proposal at a later time.

Note: You can initially leave these fields blank. The ‘Actual Start Date’ and ‘Starting Annual Salary’ are completed after the background check is successfully returned and after the Offer Letter is negotiated and signed.

Note: If you are hiring a foreign national, please enter the Payroll Control Number (PCN) in the ‘Background Check Detail’ box from the foreign tax office. (Details on page 3.)

If you are hiring a current CSU employee, please indicate that in this field.

Note: You may add Budget Summary information here if you have not already done so in the posting. This is optional.
Background Check Requirement Tab

Note: The ‘Background Check Requirement’ tab will pull over information previously completed on the position description regarding additional background checks Human Resources will initiate. No action is needed on this tab.

1. When complete, click ‘Next>>’ to continue to the 'Hiring Proposal Documents’ tab. ‘Save’ to return to complete the Hiring Proposal at a later time, or ‘<<Prev’ to return to the previous tab.
On the ‘Hiring Proposal Documents’ tab, you may add documents such as budget authorization, recruitment documentation, Offer Letter, etc.

Please wait to attach the required, signed Offer Letter until AFTER the background check has been approved.

1. When complete, click ‘Next>>’ to continue to the ‘Hiring Proposal Summary’ tab, ‘Save’ to return to complete the Hiring Proposal at a later time, or ‘<<Prev’ to return to the previous tab.
Note: On the ‘Hiring Proposal Summary’ tab you may review the hiring proposal and make any edits as needed.

1. When you are finished reviewing the hiring proposal, hover over the ‘Take Action On Hiring Proposal’ button and select ‘Submit to Background Check (move to Background Check)’.

2. You may leave any comments or questions for Human Resources in the ‘Comments’ box. Check the box ‘Add this hiring proposal to your watch list?’ if you wish can track the proposal on your home page. Click ‘Submit’.
Note: Once the hiring proposal has transitioned to the ‘Background Check’ workflow state, if needed, HR will initiate the standard CSU background check along with any other background checks requested by the department (Motor Vehicle Record check, Education Check, etc.).

1. Once HR receives notice of a successful background check, HR will transition the hiring proposal back to the Hiring Authority by selecting ‘Approve for Make Offer/Offer Letter’ from the orange ‘Take Action on Hiring Proposal’ drop down menu.
Note: Once HR moves the hiring proposal forward to ‘Make Offer/Offer Letter’, the Hiring Authority will receive an email from the system letting them know that an ‘Action’ is required of them in the system. At this point, the Hiring Authority can enter into negotiations with the candidate and a formal Offer Letter can be sent for signatures.

1. Once the Hiring Authority receives the signed Offer Letter from the candidate, they will need to finalize the hiring proposal by clicking ‘Edit’.
Hiring Information (revisited by Hiring Authority)

1. Scroll down to the bottom of the page to find the ‘Hiring Information’ section. Add the candidate’s negotiated ‘Actual Start Date’ and ‘Starting Annual Salary’.

Note: These fields MUST match what is stated in the Offer Letter. Be sure to enter in the ‘Starting Annual Salary’ as NUMERIC values only. (No commas, special characters i.e., dollar signs, letters, etc.).

Due to the TMS integration with Oracle, start dates for new appointments/hires must be dated within the month of hire/change, or a future date. Please update the hiring proposal and Offer Letter to reflect the current or future date for this newly appointed individual. If there is a unique circumstance related to the start date for this new appointment/hire, please contact the Records unit in Human Resources at HR_Records@colostate.edu.
Hiring Information for Part-Time candidate (revisited by Hiring Authority)

Note: If you are hiring a salaried individual who will be working less than 40 hours a week, their part-time status will need to be reflected in the Work Hours/Week field.

In this scenario, LeeAnn will be working 50% of the FTE and will be making $33,500 a year. Instead of entering in '33500' in the ‘Starting Annual Salary’ field, the Hiring Authority needs to enter her salary as a 100% FTE. The ‘20’ that was entered into the ‘Work Hours/Week’ field will allow the system to determine that she will be making half of what was entered into the ‘Starting Annual Salary’ field.

If 33500 was entered as her starting annual salary, and 20 was entered in for her work hours a week, the system would read that she is only making $16,750, which is incorrect.

1. When you are finished, click ‘Save’.
Uploading *Signed* Offer Letter

1. To upload the signed Offer Letter, hover over ‘Actions’ and select ‘Upload New’.
Uploading *Signed* Offer Letter

1. Click on ‘Choose File’.

2. Select the file and click ‘Open’.

3. Click ‘Submit’.
Once the signed Offer Letter and other documents are uploaded, you may click ‘Next’ to advance to the ‘Hiring Proposal Summary’ tab.

Note: TMS may be used as a ‘filing’ resource for all documents used in a search. Recruitment documents, committee notes, and other search documents may be uploaded and stored within the system.

Note: All uploaded documents will be converted to PDF’s by the system.

Note: A system banner across the top of the page will let you know that the document ‘Signed Offer Letter’ was successfully uploaded.
1. After you have sufficiently reviewed the hiring proposal, hover over the 'Take Action on Hiring Proposal' button and select 'Move to OEO Final Approval…'.

2. Add any relevant comments for OEO. Uncheck the checkbox if you wish to remove it from your watch list, then click on 'Submit'.
Note: OEO will review the hiring proposal. Once it’s approved, OEO will move the hiring proposal into ‘Hired’.

Note: OEO will fill in the Legal First Name field if it wasn’t already populated.
Note: Once OEO has placed the hiring proposal into the workflow state 'Hired', the Hiring Authority will be able to see the update reflected on the hiring proposal. Notice how the candidate's workflow state updates to 'Hired' as well.
Hello Emily Rogers

As the Hiring Authority for the Business Process Manager position (posting #: 201600813AP), you are being notified that the applicant, LeeAnn [redacted], has been placed in the status of "Hired."

At this point in the workflow, no further action is required in the Talent Management System.

Applicant Name: LeeAnn [redacted]
Posting #: 201600813AP
Job Title: Business Process Manager
Classification Code:
Position Version #: 016833.0002
Department:RamCard Office

Thank you,

Office of Equal Opportunity

ooe@colostate.edu
970-491-5836

Note: Once the applicant has been transitioned to a 'Hired' status, the Hiring Authority will receive an email notification from the system.

Note: For new appointments, you will need to go into Oracle to finalize the hire.

If you have an issue or questions please see our training website at http://ooe.colostate.edu/talent-management-system-tms or complete a help ticket at http://ooe.colostate.edu/tms-help.
Hello Emily Rogers

As the Applicant Manager for posting Business Process Manager, posting number 201600813AP, you are being notified that the applicant, LeeAnn [REDACTED] has been placed in the status of Hired. At this point in the workflow, no further action is required in the Talent Management System.

Applicant Name: LeeAnn [REDACTED]
Posting #: 201600813AP
Job Title: Business Process Manager
Department: RamCard Office

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 or complete a help ticket at http://oeo.colostate.edu/tms-help.

Note: The Applicant Manager will also receive an email from the system letting them know that the candidate has been hired.

At this point, the Applicant Manager should reach out to all unsuccessful applicants letting them know that the position has been filled.

For help with creating mass, personalized emails that can be sent out using an applicant spreadsheet, please view our guide on creating a mail merge located here: https://oeo.colostate.edu/media/sites/144/2017/05/CSU-Create-a-Mail-Merge.pdf
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