Equal Opportunity Coordinators (EOC or EO Coordinators) 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 and candidates 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 candidates for interviews and the candidate(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 illustrates how the candidate rationale 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 an applicant 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 detail in the rationale should increase, reflecting the committee's decision making process throughout the search.
Approving Applicants as an EOC Flowchart

- **Applicant Manager**
  - Request Semifinalist Interview

- **EO Coordinator**
  - Review and Approve Semifinalist Interview

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

- **Applicant Manager**
  - Request Finalist Interview

- **EO Coordinator**
  - Review and Approve Finalist Interview

- **Hiring Authority**
  - Start Hiring Proposal

- **OEO**
  - Review and Approve Recommend for Hire

- **EO Coordinator**
  - Review and Approve Recommend for Hire

- **Applicant Manager**
  - Request Recommend for Hire

- **OEO**
  - Review and Approve Finalist Interview

**Email trigger sent to the EO Coordinator**

**Email trigger sent to the Applicant Manager**

**Email trigger sent to the Hiring Authority**
Example of system email sent to EO Coordinators when an action is awaiting their approval

1. 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 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 EO Coordinator will receive a separate email for each individual moved. i.e. if the Applicant Manager moves five applicants into an EO Coordinator owned workflow state, the EO Coordinator will receive five separate emails.

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

**Be sure you are logged in under the correct user group so that the direct link will work**

http://colostate-sb.peopleadmin.com/hr/postings/57158

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

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Hello Test User,

Cho Chang has been placed in the Request Semifinalist Interview - EOC workflow state.

Please follow the link below and click on the ‘Applicants’ tab to review:

http://colostate-sb.peopleadmin.com/hr/postings/57158

Job Title: Assistant / Associate Professor

Position #: 010003.0001

Posting #: 201800129F

Department: College of TMS Training

Thank you,
Office of Equal Opportunity
oeo@colostate.edu
970-491-5836
1. To review and approve interview/hire requests, log in to the Talent Management System (TMS) at https://jobs.colostate.edu/hr.

2. Ensure you are in the Applicant Tracking module. To change system modules, click on the three dots in the top left corner and select your desired option.

3. Select the EO Coordinator user role from the User Group drop-down menu.
1. Once in the EO Coordinator user role, click on Postings from the top menu and select either Admin Professional/Research Professional or Faculty from the drop-down menu.
1. Locate and select the posting (search) by clicking on the working title.

Shortcut: Hover over Actions and select View Applicants from the drop-down menu to be taken directly to the Applicants tab within the posting.

Note: To quickly find the correct posting, type the posting number into the search bar then click the Search button.
1. To review applicants, 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 on the Applicants tab, hover over Saved Searches and select (Group) – EOC Applicant Spreadsheet.

Note: When you first navigate to the Applicants tab, the system automatically defaults to display Active Applicants. To review all applicants and their rationales entered in by the applicant manager, you will need to utilize a Saved Search.
### Reviewing All Rationales Before Approving Requests

1. The EOC Applicant Spreadsheet saved search is an extremely useful tool. It allows the EOC to 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 an easier and quicker review. Please ensure that all rationales are appropriate and provide enough information.

<table>
<thead>
<tr>
<th>Active Applicants</th>
<th>Workflow State Entrance Reason</th>
</tr>
</thead>
<tbody>
<tr>
<td>Patil, Parvati 2018011298</td>
<td>Determined Did Not Meet Min Quals</td>
</tr>
<tr>
<td>Delacour, Fleur 2018011298</td>
<td>Incomplete</td>
</tr>
<tr>
<td>Finnigan, Seamus 2018011298</td>
<td>Determined Did Not Meet Min Quals</td>
</tr>
<tr>
<td>Thomas, Dean 2018011298</td>
<td>Incomplete</td>
</tr>
<tr>
<td>Brown, Lavender 2018011298</td>
<td>Incomplete</td>
</tr>
<tr>
<td>Abbott, Hannah 2018011298</td>
<td>Determined Did Not Meet Min Quals</td>
</tr>
<tr>
<td>Krum, Viktor 2018011298</td>
<td>Incomplete</td>
</tr>
<tr>
<td>Crabbe, Vincent 2018011298</td>
<td>Incomplete</td>
</tr>
<tr>
<td>Goyle, Gregory 2018011298</td>
<td>Incomplete</td>
</tr>
<tr>
<td>Malfoy, Draco 2018011298</td>
<td>Request Semifinalist Interview - EOC</td>
</tr>
<tr>
<td>McCarthy, Patrick 2018011298</td>
<td>Assistant / Associate Professor - Defense Against the Dark Arts</td>
</tr>
<tr>
<td>Petry, Emily 2018011298</td>
<td>Assistant / Associate Professor - Defense Against the Dark Arts</td>
</tr>
<tr>
<td>Pavuk, Aubrey 2018011298</td>
<td>Assistant / Associate Professor - Defense Against the Dark Arts</td>
</tr>
<tr>
<td>Fleur 2018011298</td>
<td>Interview - EOC</td>
</tr>
<tr>
<td>Seamus 2018011298</td>
<td>Interview - EOC</td>
</tr>
<tr>
<td>Dean 2018011298</td>
<td>Interview - EOC</td>
</tr>
<tr>
<td>Lavender 2018011298</td>
<td>Interview - EOC</td>
</tr>
<tr>
<td>Hannah 2018011298</td>
<td>Interview - EOC</td>
</tr>
<tr>
<td>Viktor 2018011298</td>
<td>Interview - EOC</td>
</tr>
<tr>
<td>Vincent 2018011298</td>
<td>Interview - EOC</td>
</tr>
<tr>
<td>Gregory 2018011298</td>
<td>Interview - EOC</td>
</tr>
<tr>
<td>Draco 2018011298</td>
<td>Interview - EOC</td>
</tr>
</tbody>
</table>

#### Notes:
- **Workflow State (internal)**: This column shows which workflow state an applicant is currently in.
- **Workflow State Entrance Reason**: This column shows the rationale for each applicant.
- The workflow states Determined did not meet min quals, Incomplete and Late applicant not currently under review do not require rationales. Because of this, the Workflow State Entrance Reason for these applicants will be blank.
1. After you have reviewed the rationale for all applicants, including those moving forward and not moving forward in the search process, and 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 (for EO Coordinators) saved search, 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 Interview Requests in ‘Bulk’

1. To approve all interview requests in ‘Bulk’ (at the same time), 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.

<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>Draco</td>
<td>Malfoy</td>
<td>201800129F</td>
<td>Request Semifinalist Interview - EOC</td>
<td>July 25, 2018 at 03:40 PM</td>
</tr>
<tr>
<td>Cho</td>
<td>Chang</td>
<td>201800129F</td>
<td>Request Semifinalist Interview - EOC</td>
<td>July 25, 2018 at 03:40 PM</td>
</tr>
<tr>
<td>Luna</td>
<td>Lovegood</td>
<td>201800129F</td>
<td>Request Semifinalist Interview - EOC</td>
<td>July 25, 2018 at 03:40 PM</td>
</tr>
<tr>
<td>Neville</td>
<td>Longbottom</td>
<td>201800129F</td>
<td>Request Semifinalist Interview - EOC</td>
<td>July 25, 2018 at 03:40 PM</td>
</tr>
<tr>
<td>Ginny</td>
<td>Weasley</td>
<td>201800129F</td>
<td>Request Semifinalist Interview - EOC</td>
<td>July 25, 2018 at 03:40 PM</td>
</tr>
<tr>
<td>Ron</td>
<td>Weasley</td>
<td>201800129F</td>
<td>Request Semifinalist Interview - EOC</td>
<td>July 25, 2018 at 03:40 PM</td>
</tr>
</tbody>
</table>
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 name below.

Note: You can also update candidate 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 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 an email notification from the system asking them to make an update which includes your ‘explanation’.

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

Note: After all interviews have been conducted and the committee has received the final hiring decision from the hiring authority, the applicant manager will move the selected candidate into the workflow state 'Recommend for Hire–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 request.

1. Navigate to the Applicants tab in the posting and select (Group) - EOC Applicant Spreadsheet from the Saved Searches drop-down menu.
Reviewing All Rationales Before Approving Hire Request

Note: The EOC Applicant Spreadsheet saved search 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.

1. Review all rationales for candidates who are and are not moving forward in the search process.
Approving the Hire Request

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

Note: By utilizing the Bulk Move Option Missing (for EO Coordinators) saved search, only applicants in EO Coordinator ‘owned’ workflow states will appear in the list below.

2. After utilizing the Saved Search, click on the candidates first name to approve the request.
Approving the Hire Request

1. Once in the job application, hover over the Take Action On Job Application button and select Recommend for Hire (move to Recommend for Hire – OEO).

2. In the pop-up box, select Submit.
Approving the Hire Request

Note: The system has now sent the hire request forward to OEO. At this time, there are no more actions required in the TMS for the EO Coordinator.
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