CSU Talent Management System
User Guide
Step 1: Creating a General Open Pool Posting
Overview of the CSU Open Pool Process

Brief Overview of the CSU Open Pool Process:

‘Open Pool’ postings are utilized to gather applications for potential job openings that may become vacant in a department throughout a year. Open Pools are typically used for Research Associates, Postdoctoral Fellows and Instructor positions and remain open, collecting applicants, on the CSU Jobs website for 3, 6, or 12 months. Once an applicant has applied to an Open Pool posting, their application materials will be copied over to ‘Secondary’ Open Pool postings, and reviewed every time a new vacancy becomes available. Hiring through the Open Pool process can be significantly quicker than standard searches because the Open Pool posting has already been gathering an applicant pool to review when a new vacancy becomes available.

The open pool process involves three steps.

- **Step One: Create the General Open Pool posting to collect applications.** The General Open Pool is NOT created from a position description and is only used to ‘cast a net’ to collect applications for potential openings that may become available in the department throughout the year.

- **Step Two: Create or modify a position description to use for the hire.** Once a vacancy opens up in a department, either in a research lab seeking a research associate, research scientist or postdoctoral fellow or in a classroom setting seeking a non-tenure track instructor, the department will submit a position description to HR for review.

- **Step Three: Create the Secondary Open Pool posting from an approved position description to hire the individual(s).** Secondary Open Pool postings are NOT advertised. They are the only method available to hire out of the General Open Pool. CSU cannot hire out of General Open Pools because in doing so, it would remove the posting from the CSU Jobs website, thus eliminating the department’s ability to continue to collect applicants. Instead, departments create Secondary Open Pool postings from approved position descriptions and request that when OEO reviews and approves the Secondary Open Pool posting, the current applicant list from the General Open Pool is copied to the Secondary Open Pool. Once copied, the department submits their hire request through the Secondary Open Pool posting. In doing so, the desired applicant is then hired into the correct position description and the General Open Pool remains open to continue collecting applications for future vacancies.
Below is the TMS approval process for General Open Pool Posting Requests for **Administrative Professional/Research Professional** positions (Research Associates, Research Scientists, Postdoctoral Fellows, etc.).

The steps in the following pages explain how to create and utilize a **General Open Pool Posting**.

Below is the TMS approval process for General Open Pool Posting Requests for **Faculty** positions (non-tenure track instructors).
Creating a **General** Open Pool Posting to gather applicants

1. Select the Applicant Tracking module by clicking the three dots in the top-left corner of the screen.

2. Select Initiator from the User Group drop-down menu.
Creating a **General Open Pool Posting** to gather applicants

1. Click on **Postings** in the menu across the top then select **Admin Professional/Research Professional** from the drop-down menu.
Creating a **General** Open Pool Posting to gather applicants

1. Once on the Postings page, click the + Create New Posting button and the Create New box will appear.
Creating a **General** Open Pool Posting to gather applicants

1. Select Create from Position Type.

**Note**: Create from Posting is only used when creating a General Open Pool from a **PREVIOUSLY POSTED** General Open Pool. Selecting this option will clone and pull over all the information entered from a preexisting General Open Pool Posting. If you have questions regarding the use of this option, please reach out to OEO at oeo@colostate.edu.

**Note**: Create from Position Description is only when creating a Secondary Open Pool Posting to hire out of (see guide 3) or for the standard search process.
Creating a **General Open Pool Posting – New Posting Settings Page**

1. Fill out the Working Title field. The working title should include “– Open Pool” at the end.

2. If you are able, select the correct Division, Academic/Reporting Area and Department for the General Open Pool. If you are not able to edit these fields, the system will default to the Organizational Unit for which your TMS profile is assigned.

Note: This drop down selection will auto populate. Please leave it as Under Review by Dept/Committee.
1. Ensure that the Accept online applications box is checked.

Note: Please do not update the Special offline application instructions at this time.

Optional: If you will be soliciting letters of recommendation, you will need to update these three References fields. Otherwise, leave them blank and use the reference tab further along in the process to collect reference contact information.

For further help setting up the reference collection tool in the system, please see our training guide located here: https://oeo.colostate.edu/media/sites/144/2017/05/How-to-Request-References-in-TMS.pdf

Note: Please do not update the Special offline application instructions at this time.

2. When ready, click Create New Posting to continue to the Posting Details page.
Note: After you click Create Posting, you will then be taken to the Posting Details page where you will need to complete required fields and fill in information about your General Open Pool Posting. Some fields may or may not be editable by you.

Note: The Classification Information section will be blank and will not be editable. Information will only populate in these fields if you created your posting from an approved position description. General Open Pools are not created from position descriptions.
Creating a **General Open Pool Posting** – Posting Details cont.

1. Select No from the Accelerated Search Process Requested drop-down menu.

2. The Proposed Annual Salary Range field may be left blank or “Salary is commensurate with experience and qualifications” may be entered.

3. Enter a Description of the Work Unit. This field should be used to showcase and promote the work of the department or unit to provide a brief overview to potential applicants.

4. Use this field to select a Hiring Authority. For General Open Pools, this is typically the search support staff member. This field is not pertinent to the General Open Pool but is required to complete the posting.

Note: The Position Number and Employment Category fields will be blank because a General Open Pool is not created from a position description.

Note: FLSA will be blank as this field pulls over from a position description.
1. These two fields are not pertinent to the General Open Pool posting but are required fields in the system. You may enter your name and working title if you wish.

2. Fill in the Position Summary field. You may provide as much detail as you wish. The summary should briefly describe the open pool hiring process and may also list potential areas of research.

3. In the Required Job Qualifications field, fill in the minimum requirement for every possible level you are hiring for. These should be the most basic requirements needed for each position level (i.e. degree, years of experience, etc.) and in most cases will follow the outlined CSU research associate series concept/research scientist career track.

Note: These three fields typically pull over from a position description and will not be editable.

TIP: To format the qualifications with ‘bullets’, type * before each qualification.
Creating a **General** Open Pool Posting – Posting Details cont.

1. Select No from the Is this an Hourly position? drop-down field.

   Note: Preferred Job Qualifications are optional for General Open Pools. Any preferred qualifications you list here will also **need to be included** on your Secondary Open Pool posting when you make your hire.

2. The Working Title will pull through from the New Posting Settings page. You may make any necessary changes here.

   Note: The Work Hours/Week field typically pulls over from a position description and is not editable. It will be blank on the General Open Pool Posting.

3. If this is a Research Associate, Research Scientist or Postdoctoral Fellow open pool, select Yes from this drop-down menu.

   Note: A Posting Number will be assigned by the system once the General Open Pool Posting moves out of the Draft workflow state.

   **Posting Details**

   - **Is this an Hourly position?**
     - No
     - This field is required.
     - Hourly positions do not have guaranteed hours and may work within a range of 0-40 hours per week.

   - **Work Hours/Week**

   - **Posting Details**
     - **Working Title**: Research Associates I, II or III - Open Pool

   - **If this is a Research Professional position, select Yes. Otherwise, select No.**
     - Yes
     - This field is required.
     - Example: Research Associate, Research Scientist, Postdoctoral Fellow.

   - **Posting Number**

   - **Number of Vacancies**

   - **Desired Start Date**

   - **Position End Date (if temporary)**

   Note: These fields may be left blank and are not required for General Open Pools.
Creating a **General** Open Pool Posting – Posting Details cont.

1. The Full Consideration Date and Close Posting Date should match. This is the date the General Open Pool ‘expires’ and is pulled down from the CSU Jobs Website. General Open Pools are typically posted for 3, 6 or 12 months.

2. Fill in the Special Instructions Summary field. Use this field to communicate the application process to applicants i.e. documents that may be required to apply, information about references, etc. It will appear at the top of the job posting on the CSU Jobs Website. Be sure to include language about reapplying when the pool expires.
Note: These fields may be left blank.

1. All CSU job postings are automatically posted to these four auto populated venues. Please do not delete them from this field. You may choose to add additional venues if you wish. Typically, General Open Pool posting announcements are added to department websites.

2. The Short Posting field allows OEO to review and approve a ‘bite-sized’ version of the posting announcement. The short posting should include the title of the position, the location, a brief summary, the ‘Quick Link for Internal Postings’ so applicants know where to apply, and the shortened EO/EA/AA and background check language that is auto-populated.
Creating a **General Open Pool Posting** – Posting Details cont.

Note: The Quick Link for Internal Postings should be included in the Short Posting Announcement above. This is a direct link to the job posting on the CSU Jobs website.

1. Select one of the five prepopulated Diversity Statements and paste it into the required field.
1. Enter the name, email address and/or phone number of the search contact into the Search Contact field. This is the individual applicants will reach out to if they have any questions.

2. Use these two fields to enter the name of your EO Coordinator and Applicant Manager for the Open Pool. Entering their names here will grant them access to the posting to complete their TMS user role duties. Multiple EO Coordinators and Applicant Managers may be entered.

3. When complete, click Save to be taken back to the top of the page.

Note: If someone’s name does not appear when searched for, they may not have access to that user group. Please fill out a TMS Access Request Form with the appropriate signatures and email it to OEO at oeo@colostate.edu.
Creating a **General Open Pool Posting**

Once saved, the system will take you to the top of the Posting Details page. Use the menu located on the left side of the screen to skip forward to the Supplemental Questions section.

Note: The Essential Job Duties, Position Budget Information, Alternative Appointment Request and Background Check Requirements sections are not used when creating General Open Pool postings and may be skipped for now.
Creating a General Open Pool Posting – Supplemental Questions

Note: Supplemental questions are similar to minimum qualification screening forms. They can be utilized to determine if an applicant meets minimum qualifications by having them answer a set of questions when they are applying to the position. Certain answers to questions can be made ‘disqualifying’. This means that if an applicant selects a disqualifying answer, they will automatically self-disqualify from the pool. This automatically places them into the workflow state ‘System determined did not meet minimum qualifications’.

If you choose to use supplemental questions in your General Open Pool, you will only be able to assess the ‘bare minimum’ required qualifications of the pool. For example, if this was a Postdoctoral General Open Pool, you could ask ‘Do you have a Ph.D.?‘ as this would be the minimum degree requirement for all future hires.

If an applicant self-disqualifies from the General Open Pool, they will not be copied over to any future Secondary Open Pool postings you create as they don’t meet the ‘bare minimum’, required qualifications i.e. the minimum required degree of the position. All Secondary Open Pool postings must have qualifications that at least meet/match the required qualifications listed in the General Open Pool.

If you utilize supplemental question on your General Open Pool posting, you must select the SAME supplemental question for any future Secondary Open Pool postings in order for applicant answers to copy over correctly.

1. To add a supplemental question, click the Add a question button. (If you are not using supplemental questions, skip to page 24 of this guide.)
1. You may search for a preexisting question using the Category drop down menu, or Keyword search. Once you have found an appropriate question, check the box next to it and click the Submit button at the bottom.

2. If you are unable to find a suitable question, select Add a new one.
Creating a **General Open Pool Posting – Supplemental Questions**

1. Use the Name field to name your question. You may also select a category to file it under.

2. Enter the supplemental question in the Question field. It should directly relate to one of your required qualifications.

3. Select one of the two options under Possible Answers. Open Ended Answers allows applicants to type a personalized response. Predefined Answers gives the applicants set, multiple choices answers. Use Predefined Answers if you wish to create self-disqualifying questions.

4. Enter the possible answer choices to the question above.

5. Click Submit.

**Note:** The system will continue to generate Possible Answer ‘slots’. Only use the amount you need and ignore the new slots that appear, no need to delete them.
1. To make a question required, mark the Required check box next to the question. Marking a question as required means applicants will need to answer this question before submitting their application.

2. To make a question disqualifying, click on the question.

3. In the drop-down menu, check the box next to the answer you would like to make disqualifying. If an applicant selects this answer, they will self-disqualify from the pool and will automatically be placed into the inactive workflow state ‘System determined did not meet min quals’.

4. When ready, click Save.
1. Once saved, click on Applicant Documents from the left-side menu.

Note: CSU does not use Qualification Groups. You may skip this section.
Note: On the Applicant Documents tab, select the documents applicants will need to attach to their applications when applying to the General Open Pool Posting. Documents are categorized as ‘Not Used’, ‘Optional’ or ‘Required’. You can mark specific documents as Optional or Required based on the needs of your job search. Any documents selected here will need to be listed in your Special Instructions Summary field.

1. When complete, click Save.

Note: You can reorder the documents by typing in a number in the Order box OR by dragging and dropping the document into your desired order. Please note, the same documents and their order will need to be selected on the Secondary Open Pool Posting to allow for the documents to copy over correctly.
Creating a **General Open Pool Posting**

1. Once saved, click on the **References** section from the left-side menu.

**Note:** The Search Committee and Evaluative Criteria sections are not used when creating General Open Pool postings and may be skipped for now.
Creating a **General Open Pool Posting** – References

Note: This page is used to select how many references you wish applicants to list when applying.

1. Enter the minimum and maximum number of references you wish to collect from each applicant. Please note, the number of reference selected here will need to be selected on the Secondary Open Pool Posting.

   - Minimum Number of References: 3
   - Maximum Number of References: 3

Note: These fields may be left blank.

2. When ready, click Save.
Creating a **General Open Pool Posting**

1. Once saved, click on Summary from the left-side menu.

Note: Posting Documents (minimum qualifications screening form and applicant rating sheets) are not required for the General Open Pool Postings but are required on Secondary Open Pool Postings.
Creating a **General Open Pool Posting – Summary**

**Postings**

- Admin Professional/ Research Professional/ Research Associates I, II or III - Open Pool (Draft) / Summary

**Note:** The General Open Pool Posting Summary page displays all of the information filled in for each field. In addition, new links appear across the top: History (all transactions associated with the posting) and Settings (which department the posting resides and other information). To access these areas, simply click on the tab.

**Posting: Research Associates I, II or III - Open Pool (Admin Professional/ Research Professional)**

- **Current Status:** Draft
- **Position Type:** Admin Professional/ Research Professional
- **Department:** College of TMS Training (0000)

**Created by:** Test User
**Owner:** Test User

**Summary**

- **History**
- **Settings**

**Note:** In addition to summary information about your General Open Pool, you may also ‘See how Posting looks to Applicant’, print preview the ‘Applicant View’ of the posting, or ‘Print Preview’ the whole posting as it is viewed internally. You can also add the posting to your Watch List. Doing so will allow you to track the posting on your TMS homepage.
1. Once you have sufficiently reviewed the posting and are ready to move it forward to the EO Coordinator for review, hover over the Take Action on Posting button and select EO Coordinator Review (move to EO Coordinator Review).

2. You may add relevant comments for the EO Coordinator in the optional Comments box. When ready, click Submit.
Creating a **General Open Pool Posting** – Move in Workflow (from EO Coordinator to Hiring Authority)

1. Once the EO Coordinator has sufficiently reviewed the posting and is ready to move it forward to the Hiring Authority for review and approval, they will hover over the Take Action on Posting button and select Standard Search Process (move to Hiring Authority Review and Approval).

2. The EO Coordinator may add any relevant comments in the optional Comments box. When ready, they will click Submit.
1. Once the Hiring Authority has reviewed the posting, they will hover over the Take Action on Posting button and select Approved (move to OEO Review and Approval).

2. The Hiring Authority may add any relevant comments for OEO. When ready, they will click Submit.
Creating a **General Open Pool Posting** – Move in Workflow (from OEO to ‘Posted’)

Note: OEO has a two step approval process. Once the posting has transitioned from the preview stage, OEO ‘approvers’ will review the posting request and reach out to the Initiator if they have any questions or corrections.

1. Once OEO has sufficiently reviewed the posting, they will hover over the Take Action on Posting button and select Posted (move to Posted).
General Open Pool Posting will appear on the CSU Jobs Website

Note: Once the General Open Pool Posting has been placed into the 'Posted' workflow state, the job will automatically appear on the CSU Jobs website, Connecting Colorado, Indeed.com, and HigherEdJobs.com. At this point you may begin advertising in your other selected recruitment venues.
Hello Test User,

The Research Associates I, II or III - Open Pool position (Posting #: 201800488AP) has been placed in the status of "Posted."

Advertising for this position can now begin. Please work with your support staff if you will be posting this announcement in other venues.

Position #:

Job Title: Research Associates I, II or III - Open Pool

Department: College of TMS Training

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 email CEO at oeo@colostate.edu

Note: The Applicant Manager will receive an email notification from the system once the posting has been approved.
You have now completed Step #1 of the Open Pool Process, the creation of a General Open Pool posting.

From here, your General Open Pool posting will begin to accumulate applicants. When a job opening or new vacancy has been identified in your department, you may move forward to the Open Pool Step #2 guide located here.

Step #2 will cover the creation of a position description in preparation to hire out of a Secondary Open Pool Posting.
Need further help?

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

https://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