CSU Talent Management System

User Guide

Step 2: Creating a Position Description to Hire out of an Open Pool
How to Hire Out of an Open Pool

Once a new vacancy associated with your General Open Pool Posting has been identified, the Initiator will create a new, or in most cases modify a current position description to be used to complete the hire.

This position description should capture all the details (including name and required and preferred qualifications of the specific laboratory or hiring department) that are specific to the new position/vacancy (not just the General Open Pool).

Note: Preparation of the position description can be done AHEAD OF TIME if the department knows a position will be vacant/needed. If you already have an approved position description available, skip ahead to Step 3.

This guide takes place on the ‘Positions’ side (module) of the TMS. The following 6 pages will demonstrate how to Modify a position description. For instructions on how to Create or Clone a position description, please skip forward to page 9.
Modifying a Position Description that will utilize an Open Pool

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

2. Select Initiator from the User Group drop-down menu.
Modifying a Position Description that will utilize an Open Pool

1. Click on position descriptions in the top menu and select Admin Professional/Research Professional from the drop-down menu.

Note: position descriptions can be found in two separate areas. Positions that have been created or modified and are either moving through the approval process or have been saved for later can be found under the 'Requests' options.

Once a created position or position modification has been approved, the updated position can be found in the position 'library' (the library options are those without 'Requests' in the name). If you are creating a position description for the first time or are just starting a modification, you will start in the position 'library'.
Modifying a Position Description that will utilize an Open Pool

1. Click on the working title of the position you wish to modify.

Note: To search for an existing position description to modify, enter the title or key words associated with the position description into the main search field. Or, click on the More Search Options button to drop down the advanced search menu. Then type the Position Number in the Position Number field and click Search.
Modifying a Position Description that will utilize an Open Pool

1. Click on Modify AP Position.
Modifying a Position Description that will utilize an Open Pool

1. Click Start.
Modifying a Position Description that will utilize an Open Pool

1. Once you click Start you will be taken to the Position Justification section of the position description. Check a Reason for Modification to help Human Resources prioritize the request. More than one option may be selected.
Creating a Position Description that will utilize an Open Pool

To continue the modification request, skip ahead to page 15.

The following 5 pages will demonstrate how to Create a new position description. While Creating a position description may be necessary in some situations, Human Resources highly encourages the modification and use of current, unoccupied position descriptions if they are available as opposed to creating new ones.
Creating a Position Description that will utilize an Open Pool

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2. Select Initiator from the User Group drop-down menu.
1. Click on position descriptions in the top menu and select Admin Professional/Research Professional from the drop-down menu.

Note: position descriptions can be found in two separate areas. Positions that have been created or modified and are either moving through the approval process or have been saved for later can be found under the 'Requests' options.

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Creating a Position Description that will utilize an Open Pool

1. Click on + Create New position description.

Admin Professional/ Research Professional

Position Descriptions

<table>
<thead>
<tr>
<th>Working Title</th>
<th>Position Number</th>
<th>Department</th>
<th>Employee First Name</th>
<th>Employee Last Name</th>
<th>Supervisor</th>
<th>Status</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Academic Success Coordinator</td>
<td>012345.0001</td>
<td>College of TMS Training (0000)</td>
<td></td>
<td></td>
<td>Coordinator: Search Approvals &amp; Office Operations (Becca McCarty)</td>
<td>Active</td>
<td></td>
</tr>
<tr>
<td>Research Associate II - TMS Lab</td>
<td>024680.0001</td>
<td>College of TMS Training (0000)</td>
<td></td>
<td></td>
<td>Coordinator for Talent Management System (Emily Rogers)</td>
<td>Active</td>
<td></td>
</tr>
</tbody>
</table>
Creating a Position Description that will utilize an Open Pool

Note: There are two options available when creating a new position description.

**Option 1:** Creating a blank, completely new position description. No information will be populated and you will be required to fill in all of the fields.

**Option 2:** Cloning a current position description. In doing so, the new position description will pull over all of the populated fields and information associated with the cloned position description. Use this option if you need to create an identical position description to one that already exists. This can be helpful when hiring multiple people for the exact same position.

1. If you chose Option 1, enter a Working Title for the position description in the Working Title field. Ensure that the title is unique to the hire i.e. the name of the lab the hire will be working in. **DO NOT** include ‘Open Pool’ in the Working Title.

2. Click Start Position Request.

**Note:** The Organizational Unit details may or may not be editable by the Initiator. If you only have access to one department in TMS, your assigned Division, Academic/Reporting Area and Department will automatically pull through. If you are assigned to multiple departments/units, select the correct unit for this new position.
Cloning a Position Description that will utilize an Open Pool

1. If you chose Option 2, cloning an existing position description, scroll down to the bottom of the Create New page.

2. Select the radio button next to the working title of the position description you wish to clone.

3. Click Start Position Request.

Note: To search for an existing position description to clone, enter the title or key words associated with the position description into the main search field. Or, click on the More Search Options button to drop down the advanced search menu. Then type the Position Number in the Position Number field and click Search.
Note: The following slides will demonstrate how to fill in a position description, regardless of whether or not it was started from a modification, a create new action or cloned from an existing position. Please note, when modifying a position description, you will need to select a Reason for Modification, normally found on the Position Justification section. Created or cloned positions will not have this option.

1. Fill in the Justification of Need field with as much detail as possible. This helps HR determine how to prioritize the many requests they receive.

2. Select Yes or No from the Is this position gift or grant funded field.

3. If applicable, enter the percentage of gift or grant funding in this field, otherwise, enter 0.
1. If applicable, enter the Source Funding for the position, otherwise enter 0.

2. When ready, click Next.

Note: These two fields may be skipped.
Note: On the Classification Selection page you may choose to select the position's classification. However, Human Resources will review and complete classification information for you later on in the approval process. If this is a cloned or modified position description, the classification details will automatically pull over.

1. When ready, click Next.
Filling in the Position Description – Position Details

Note: Begin to fill out the Position Details page. If this is a cloned or modified position, many of the fields found on this page will already be filled in. Please review and make any necessary updates.

Note: Classification information selected on the previous page will pull through here.

Note: The Working Title will pull through from the Create New page or the previous Working Title will pull through if you cloned or modified a position. Make any needed updates here.

Note: If this is a new or cloned position description, the Position Number field will be blank.
Filling in the Position Description – Position Details

1. Enter the position’s supervisor’s email address.
2. Select an Employment Category.
3. Enter the salary or salary range.
4. Select a Salary Basis.

Note: These two fields will not be editable. Human Resources will update the FLSA field if needed.

5. If this is a new position description, fill in the Description of the Work Unit field. If you modified or cloned an existing position description, the Description of Work Unit field may already be filled in. Review and make any necessary edits.

6. If this is a new position description, fill in the Position Summary field. If you modified or cloned an existing position description, the Position Summary field may already be filled in. Review and make any necessary edits.
1. Fill in the Position Supervises field. If this position will not be supervising, enter ‘None’. If this is a cloned or modified position, ensure that the information is correct or make any necessary changes.

2. Fill in the Decision Making field. Use the Help Text below this field to determine what needs to be entered. If this is a cloned or modified position, ensure that the information is correct or make any necessary changes.

3. Check all the boxes that apply to this position in the Conditions of Employment section. Ensure that the top Pre-employment Criminal Background Check box is selected. All other boxes are optional.
1. Fill in the Required Job Qualifications of the position. Please note, the qualifications on the position description must at least match the base requirements of the General Open Pool Posting but may be more in depth to make them specific to the lab. This can be done by adding additional qualifications or increasing the years of experience or the degree required for that specific research level.

2. Enter the name of the Hiring Authority in the Hiring Authority field. Ensure that the individual who will complete the hiring proposal is listed in this field.

3. Select Yes or No from the Is this an Hourly position drop-down.

4. Enter the Work Hours/Week in this field. If this is an hourly position, enter 0.

5. When ready, click Next.

Note: If you wish, fill in Preferred Job Qualifications of the position. If you listed preferred qualifications on the General Open Pool Posting, the same preferred qualifications must be added to the position description. Additional preferred qualifications may be added as well.
Note: On the Essential Job Duties page you will need to fill in at least two 'job duties' which total 100%. This includes the Job Duty Category, Duty/Responsibility, and Percentage Of Time the job duty is performed.

1. To add a job duty, click the Add Essential Job Duties Entry button at the bottom of the page. If this is cloned or modified position, the Essential Job Duties may already be filled in. Review and make any edits if needed. Ensure that all job duties add up to 100%.

2. When ready, click Next.
Filling in the Position Description – Functional Attributes

Note: On the Functional Attributes page please select the physical demands, mental functions, environmental conditions & physical surroundings, and hazards associated with the position. If this is a cloned or modified position, this page may already be filled in. Review and make any edits if necessary.

1. To make a selection, click on the drop-down menu next to each category and select one of the options that best aligns with the physical demands of the position.

2. When ready, click Next.
Note: The Position Budget Information page is optional but recommended as it can be helpful when managing funding from multiple grants. You may click on the Add Budget Summary Entry button to complete the Budget Account Number, Percentage Funded, and Budget Account Name fields. If this is a cloned or modified position these fields may already be filled in. Review and make edits if necessary.

2. When ready, click Next.
1. All drop down choices on this page are optional, with the exception of the required Motor Vehicle background check option. You must select either ‘Yes’ or ‘No’.

2. When ready, click Next.

Note: If a Motor Vehicle Record Check is required for this position, this must be reflected in the ‘Required Job Qualifications’ field by adding the language “Must have a valid driver’s license or the ability to obtain a driver’s license or access to a licensed driver by the employment start date”. ‘Valid Driver’s Licenses’ must also be selected in the ‘Conditions of Employment’ multi-select field.

Note: The Background Check Requirement page allows you to select any additional background checks the department wishes to conduct for this position in addition to the automatic criminal history background check for new hires and rehires. If this is a cloned or modified position, previous background check selections will pull through. Review and make edits if necessary.
Note: On the Supervisory Position page select the current supervisor for the position. If you are modifying a position or cloning a position, this area will most likely already have existing selections. To replace a selected supervisor, follow the same instructions as selecting one for the first time.

1. To select or change the supervisor, click on the Filter these results button or select their name from the list below.
Filling in the Position Description – Supervisory Position

1. In the pop up window, type in the supervisor’s name. Be sure to select their Position Type (Faculty, Administrative Professional, or State Classified) from the Position Type drop-down menu then click Search.
1. Check the radio button next to the name of the correct supervisor.

2. Click Save.
Filling in the Position Description – Supervisory Position

Note: The supervisor will now appear in this section.

2. Click Next.

<table>
<thead>
<tr>
<th>Job Title</th>
<th>Coordinator: Search Approvals &amp; Office Operations view</th>
</tr>
</thead>
<tbody>
<tr>
<td>Position Number</td>
<td></td>
</tr>
<tr>
<td>Position Type</td>
<td>Admin Professional/ Research Professional</td>
</tr>
<tr>
<td>Org Unit</td>
<td>College of TMS Training (0000)</td>
</tr>
<tr>
<td>First Name</td>
<td>Becca</td>
</tr>
<tr>
<td>Last Name</td>
<td>McCarty</td>
</tr>
<tr>
<td>Email</td>
<td><a href="mailto:emailaddress@zed.zed">emailaddress@zed.zed</a></td>
</tr>
</tbody>
</table>
To attach an Organizational Chart, hover over Actions and select Upload New in the drop-down menu.

Note: On the Position Documents page please add documents associated with the position, such as the required Organizational Chart. If you are cloning or modifying a position, an Organizational Chart may already be attached. Please make sure that it is the most current Organizational Chart for the department or unit.
To upload an Org Chart, click **Choose File**. Please note, depending on your web browser, this button may be labeled as **Browse**.

Locate the file on your computer then click **Open**.

Click **Submit**.
1. When ready, click Next.
Moving the Position Description Forward for Approval – Initiator to the Hiring Authority

1. Once you have sufficiently reviewed the position and are ready to move it forward to the Hiring Authority for review and approval, hover over Take Action on Position Request and then select Submit (move to Hiring Authority).

   Note: On the Summary page you may review and edit any of the previous pages before moving the position description forward to the Hiring Authority.

2. Click ‘Submit’.

   Note: In the pop up window, you may make any relevant comments for the Hiring Authority.
1. Once they have sufficiently reviewed the position and are ready to move it forward to HR, they will hover over Take Action on Position Request and select Approve (move to HR Position Review/Compensation Analysis).

2. When they are ready, they will click Submit.

Note: The Hiring Authority may add any comments for HR in the optional Comments box.
1. Once HR has sufficiently reviewed the position and is ready to move it to the Signature Authority, they will hover over Take Action on Position Request and select Approve (move to Signature Authority Review/Approve).

Note: Human Resources will review the position, classify it and perform a compensation analysis.
1. Once the Signature Authority has sufficiently reviewed the position and is ready to move it forward to HR Position Assignment, they will hover over Take Action on Position Request and select Approve (move to HR Position Assignment).

Note: The Signature Authority will review the position.

2. When they are ready, they will click Submit.

Note: The Signature Authority may add any comments for HR in the optional Comments box.
Final Approval – Human Resources Position Assignment

Note: HR will review the position and assign the Position Number.

1. Once Human Resources has reviewed the position and assigned a position number, they will move it to Approve (move to Position Approved/Initiate Posting).
Hello Test User,

The Research Associate II - TMS Lab position has been placed in the status of "Position Approved/Initiate Posting".
If you are planning to conduct a search for this position, you may proceed by creating a posting from this position description. Please forward this email to your Initiator to begin the posting process.

If you are planning to hire out of a general open pool, please have your Initiator create a secondary open pool posting using this approved position description.

If you will request to hire someone through the Alternative Appointment Request (AAR) process, please create an Alternative Appointment Request posting from this position description. For further instructions for creating an AAR posting, please review the training guide at this link: How to Create and Edit an Alternative Appointment Request (AAR).

If you are unsure if an Alternative Appointment Request (AAR) is needed for this new/modified position, please contact OEO at oeo@colostate.edu or 491-5836.

If you are only updating the position description to fill in missing information, you do not need to initiate a posting request.

For further instructions regarding the Administrative Professional posting process, please review the training guide at this link: How to Create and Edit an Administrative Professional Job Posting.

For further help with creating a Faculty posting, please review the training guide at this link: How to Create or Edit a Faculty Job Posting.

Position #: 024680.0001
Job Title: Research Associate II - TMS Lab
Department: College of TMS Training
Status: Position Approved/Initiate Posting

Thank you,
Human Resources
Colorado State University

Note: Once approved, the Hiring Authority will receive an email notification from the system.
At this point, the General Open Pool has been gathering applicants for the department, an opening has been identified, and a position description for the opening has been created and approved. The initiator may now progress to guide #3 which outlines creating a Secondary Open Pool Posting request from the approved position description to hire someone out of the General Open Pool.
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

e-mail OEO at [oeo@colostate.edu]