CSU Talent Management System

User Guide

Step 3: Creating a Secondary Open Pool Posting to Hire out of the General Open Pool
Making a hire out of a General Open Pool

The third and final step of the Open Pool process is to create a Secondary Open Pool Posting from an approved position description. Once the Secondary Open Pool Posting has been approved internally (not posted online), OEO will copy over the current applicant list from your General Open Pool Posting to the Secondary Open Pool Posting, ‘capturing’ the available applicant pool at the time of the open vacancy.

Old Open Pool Process vs. New Open Pool Process:

- **Old:** Previously, the Secondary Open Pool Posting was utilized by departments to submit their **finalist interview requests**, hire request, as well as create the Hiring Proposal for their top candidate. Interviews could only be performed **AFTER** the Secondary Open Pool Posting had been approved and the current applicant pool was copied over.

- **New:** Now, departments have the ability to conduct finalist interviews, **PRIOR** to creating the Secondary Open Pool Posting, as finalist interviews no longer need to be requested through the TMS. In using this process, departments will be able to submit their hire request immediately upon OEO copying over applicants to the Secondary Open Pool. This new process eliminates the finalist interview approval point as well as removing the time delay for when a department can begin reviewing applications and scheduling interview as there is now no need to wait for the creation and approval of the Secondary Open Pool Posting. The Secondary Open Pool Posting should now only be used to submit the hire request.

The following guide will demonstrate the **New** Open Pool Process when creating a Secondary Open Pool Posting.
Creating a Secondary Open Pool Posting from a Position Description

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 Secondary Open Pool Posting from a Position Description

1. Click on Postings in the menu across the top then select Admin Professional/Research Professional from the drop-down menu.
1. Once on the Postings page, click the + Create New Posting button and the ‘Create New’ box will appear.
Creating a Secondary Open Pool Posting from a Position Description

1. Select Create from Position Description.
1. Choose your approved position description by selecting it from the list below, or click the More Search Options button then type in the first 6 numbers of the position number into the Position Number field to search for the position description you wish to create the posting from.

Shortcut: Hover over the Actions drop-down and select Create From to start the posting from the selected position description.

2. To start the posting, click on the working title of the position description.
1. Review the approved position description to ensure that it is the correct version then click the Create Posting from this Position Description button in the top-right corner of the screen.
1. Fill out the ‘New Posting’ settings page.

**Note:** These fields will auto-populate with information from the approved position description. **Please do not make any major edits to this field.** You may fix spelling or grammatical mistakes or spell out abbreviations.

**Note:** The Working Title will pull over from the approved position description. **Please do not make any major edits to this field.** You may fix spelling or grammatical mistakes or spell out abbreviations.

**Note:** These fields will auto-populate with information from the position description. **Please do not update these if you have the ability to do so.**

**Note:** The Applicant Workflow should remain as ‘Under Review by Dept/Committee’.
Creating a Secondary Open Pool Posting – New Posting Page

Note: For Secondary Open Pool Postings, leave these three fields blank.

1. Ensure that the Accept online applications box is checked. This allows the applicants to be copied over from the General Open Pool Posting.

2. Ensure that the top box is selected. This allows the applicants to be copied over from the General Open Pool Posting.

3. When ready, click Create New Posting to continue to the Posting Details tab.
Note: After you click Create Posting, you will be taken to the Posting Details page. A lot of the information found on the Posting Details page will pull over from the approved position description (i.e. Classification, Position Number etc.). Some fields may or may not be editable by you.
1. Select Secondary Open Pool from the Search Process Type drop-down menu.

Note: The Position Location field will auto-populate with ‘Fort Collins, CO’. If applicable, you may update this field to accurately reflect the location of the position. Please ensure you use the ‘City, State Abbreviation’ format.

2. Select an option from the Work Location drop-down menu to indicate if the position qualifies for remote or hybrid work flexibility.

Note: The Proposed Annual Salary Range will pull over from the approved position description. Please do not alter this amount.

Note: The Promotional Announcement Additional Information field is only required for Promotional Announcement Postings.
1. Use this field to select the Hiring Authority for the search. Typically, the actual Hiring Authority is listed, as well as any individual who will be helping with the TMS workflow/processes. The Hiring Authority user role finalizes the hire by initiating a Hiring Proposal at the end of the search process.

2. Enter the position’s supervisor and their working title.

Note: The Position Summary will pull over from the approved position description.
Creating a Secondary Open Pool Posting – Posting Details Page

Note: All of these fields will pull through from the approved position description. Please do not update them.

Position Supervises
Undergraduate students
(Class/Working Title, Position #)

Decision Making
Conducts independent and collaborative research, manages laboratory operations, determines supplies and equipment inventory needs, and supervises/ trains undergraduate students. The RAII makes decisions regarding purchasing of all supplies/reagents, and together with the PI, makes decisions about hiring work-study students that aid the RAII in lab maintenance duties, repairing and purchasing of larger equipment.

Conditions of Employment
Pre-employment Criminal Background Check (required for new hires), Use, Handling, or Exposure to hazardous materials - Ethidium Bromide

Required Job Qualifications
B.S. in Molecular Biology/Genetics/Neuroscience (or closely related) and a minimum of 3 years of work experience in genetics/cell biology/molecular biology or a Master's degree in Molecular Biology/Genetics/Neuroscience.

Preferred Job Qualifications
Experience with Drosophila genetic techniques.

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.
1. Select either Yes or No from the Is this a Research Professional position… drop-down menu. Please review the help text below the field to help determine which option to select.

Note: Because Secondary Open Pool Postings are not posted to the CSU Jobs Website, all of these fields may be left blank.

Note: The Working Title will pull through from the position description.
1. In the Recruitment Plan field, delete the four auto populated venues and enter the Posting Number of the General Open Pool Posting from which OEO will be copying over applicants.

Note: You do not need to update or add content to these three fields.
### Creating a Secondary Open Pool Posting – Posting Details Page

Thank you for your interest in this position. The screening and selection process is currently underway and will continue until a successful candidate is chosen. Should review of your qualifications result in a decision to pursue your candidacy, you will be contacted.

Thank you for your interest in this position. Based on your responses to the questions on the employment application, you do not meet the minimum qualifications for this position. Please do not let this discourage you from applying for other positions at CSU that interest you.

CSU is an EO/EA/AA employer and conducts background checks on all final candidates.

Add the short posting to this field for other advertising and recruitment venues. You MUST include the below quick link in this field.

**Quick Link for Internal Postings**

http://colostate-sb.peopleadmin.com/postings/57204

Colorado State University (CSU) strives to provide a safe study, work, and living environment for its faculty, staff, volunteers and students. To support this environment and comply with applicable laws and regulations, CSU conducts background checks. The type of background check conducted varies by position and can include, but is not limited to, criminal (felony and misdemeanor) history, sex offender registry, motor vehicle history, financial history, and/or education verification. Background checks will be conducted when required by law or contract and when, in the discretion of the university, it is reasonable and prudent to do so.

Colorado State University is committed to providing an environment that is free from discrimination and harassment based on race, age, creed, color, religion, national origin or ancestry, sex, gender, disability, veteran status, genetic information, sexual orientation, gender identity or expression, or pregnancy and will not discharge or in any other manner discriminate against employees or applicants because they have inquired about, discussed, or disclosed their own pay or the pay of another employee or applicant. Colorado State University is an equal opportunity/affirmative action employer fully committed to achieving a diverse workforce and complies with all Federal and Colorado State laws, regulations, and executive orders regarding non-discrimination and affirmative action. The Office of Equal Opportunity is located in 101 Student Services.

The Title IX Coordinator is the Executive Director of the Office of Support and Safety Assessment, 123 Student Services Building, Fort Collins, CO 80523-2026, (970) 491-7407.

The Section 504 and ADA Coordinator is the Associate Vice President for Human Capital, Office of Equal Opportunity, 101 Student Services Building, Fort Collins, CO 80523-0150, (970) 491-5836.

**Note:** You may skip these fields.
Creating a Secondary Open Pool Posting – Posting Details Page

1. Copy and paste a required Diversity Statement into the field above.
2. Enter a required Search Contact. Name only is OK.
3. Select an EO Coordinator. Multiple EOC’s may be selected.
4. Select an Applicant Manager. Multiple Applicant Managers may be selected.
5. When ready, click Save.
Creating a Secondary Open Pool Posting

1. After saving, the system will take you to the top of the Posting Details page. From here, navigate to Applicant Documents section by selecting the tab on the left side of the screen.

Note: You may skip all of these sections when creating a Secondary Open Pool Posting.
Creating a Secondary Open Pool Posting – Applicant Documents Page

Note: You will need to select the **same** applicant documents in the **same order** that they were selected on the General Open Pool Posting. If the same documents are not selected on the Secondary Open Pool Posting, the uploaded applicant documents will not transfer when OEO copies over the applicants.

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.
Creating a Secondary Open Pool Posting – Search Committee Page

Note: Use the Search Committee page to list the individual(s) who actively reviewed the applicants and conducted the interviews. Typically this is the PI of a lab. The selection made on this page will serve as a record to document who made the hiring decision.

Note: Under the new open pool process, applications are reviewed and interviews are conducted prior to creating a Secondary Open Pool Posting. Because of this, departments may request to add a search committee member to the General Open Pool Posting at any time. Adding an individual as a committee member on the General Open Pool will allow that person to review the applications to determine who to interview prior to the applicants being copied over to the Secondary Open Pool. This is an optional choice.

1. To add a committee member, select Add Existing User.

If you search for an existing account under the "New Search Committee Member" using the username or email address and do not find the user you are seeking, you may complete the form in this section to request an account be created for them. Once you press the "Create New User Account" button, a new user account will be pending review by OEO for approval. Users will receive an email once their account has been approved.

Search Committee Members
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No Search Committee Members have been assigned to this Posting yet.

Add Existing User  Create New User Account
Note: Search for committee members using their email address. This guarantees that the correct committee member is being selected.

1. Click the Add Member button next to the name of the individual you wish to add. Then click Close.
1. Once you have added the search committee, click on References from the left side menu.

The Chair for this search MUST be Search Chair trained and be on the approved list on the OEO website. (Click here for the list)
Creating a Secondary Open Pool Posting – References Page

1. Enter the same minimum and maximum numbers from the General Open Pool Posting.

2. When ready, click Next.
NOTE: Use the Posting Documents tab to upload the applicant screening tools for the pool. Applicant screening tools are pre-determined rating mechanisms utilized by a committee during the initial review of applications to determine which candidates are moving forward in the search process. These tools typically consist of the Minimum Qualifications screening form and an Applicant Rating Sheet (aka applicant screening form). These forms must be uploaded on this tab to complete the Secondary Open Pool Posting.

1. To upload a screening form, hover over the Actions button and select Upload New from the drop-down menu.
Creating a Secondary Open Pool Posting – Posting Documents Page

1. To upload a document, click Choose File. Please note, depending on your web browser, this button may be labeled as Browse.

2. Locate the file on your computer then select Open.

3. When ready, click Submit.
Creating a Secondary Open Pool Posting

Note: A banner across the top of the page will let you know that the upload was successful.

1. When all screening forms have been uploaded, select Summary from the left side menu.

Note: The system automatically converts all documents to PDFs.
Creating a Secondary Open Pool Posting – Move in Workflow (from Initiator to EO Coordinator)

1. Once you have sufficiently reviewed the posting and are ready to move it to the EO Coordinator for review, hover over the Take Action On Posting button and select Standard Search Process / AAR (move to EO Coordinator Review).

2. You may add relevant comments for the EO Coordinator in the optional Comments box. When ready, click Submit.

Note: Promotional Announcement (move to OEO Promotional Announcement Review) workflow should only be selected if you are creating a Promotional Announcement posting in the system.
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.
Creating a Secondary Open Pool Posting – Move in Workflow (from Hiring Authority to OEO)

1. Once the Hiring Authority has reviewed the posting, they will hover over the Take Action On Posting button and select OEO Final Approval (move to OEO Final Review).

2. The Hiring Authority may add any relevant comments for OEO. When ready, they will click Submit.
Note: After OEO has reviewed the Secondary Open Pool Posting request, they will move the posting into the workflow state ‘Approved – Internal’.

At this point, OEO will copy over the current applicant list from the General Open Pool into the newly approved Secondary Open Pool.
Email Notification to the Applicant Manager

Hello Test User,

The Research Associate II - TMS Lab position (Posting #: 201800489AP) has been placed in the status of “Approved - Internal.”

If this is a Secondary Open Pool Posting, applicants form your general open pool will be copied over.

If this is an Internal Search to CSU or your department, please distribute this link to all individuals interested in applying: 61616

Position #: 024680.0001
Job Title: Research Associate II - TMS Lab
Department: College of TMS Training

Thank you,

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

If you have an issue or questions please see our training website at http://oee.colostate.edu/talent-management-system-tms or email OEO at oee@colostate.edu

Note: The Applicant Manager will receive an email notification from the system once their Secondary Open Pool Posting has been moved into the workflow state ‘Approved – Internal’.
Note: Once the posting has been approved ‘internally’ and the applicants from the General Open Pool Posting have been copied over, the Applicant Manager will navigate to the Secondary Open Pool Posting to begin the process of moving applicants into different workflow states.

1. As an Applicant Manager, navigate to the Secondary Open Pool Posting and select the Applicants tab.
Applicant Manager – Begin process of transitioning applicants into different applicant workflow states

Posting: Research Associate II - TMS Lab (Admin Professional/ Research Professional)

Note: Once on the Applicants Tab, the Applicant Manager will be able to see the applicant’s copied over from the General Open Pool. In this example, there are currently 60 active applicants. Because applicants have already been reviewed and interviewed prior to them being copied over to the Secondary Open Pool using the New Open Pool Process, the Applicant Manager can submit their hire request, AFTER they update everyone else’s workflow state.

1. Before submitting the hire request, the Applicant Manager will need to transition applicants who did not meet the minimum qualifications for the Research Associate II level into the workflow state ‘Determined did not meet min quals’. To bulk move these applicants (transition at the same time), check the boxes next to the names of the appropriate applicants.
1. Once all applicants who did not meet the minimum qualifications for the Secondary Open Pool position are selected, hover over the Action button and select Move in Workflow under the Bulk sub header.
1. On the next page, select ‘Determined Did Not Meet Min Quals’ from the Change for all applicants top drop-down menu. When ready click Save Changes at the bottom of the page.

Note: Using the top drop-down menu will change the workflow states for all applicants on the page.
1. Now it's time to move the applicants who met the minimum qualifications of the Secondary Open Pool position but did not progress to a finalist interview. Check the boxes next to the appropriate names.

Note: The system will take a few seconds to finalize the transitions. Click your browser's refresh button to view the results. Notice that there are now only 40 active applicants as 'Determined Did Not Meet Min Quals' is an inactive workflow state.

2. Hover over Actions and select Move in Workflow.
Applicant Manager – Begin process of transitioning applicants – ‘Application Reviewed, Not Selected’

1. On the next page, select ‘Application Reviewed, Not Selected’ from the Change for all applicants top drop-down menu.

2. Select a Reason from the drop-down menu and enter an optional Explanation. When ready, click Save Changes at the bottom of the page.
1. Now it’s time to move the candidates who were interviewed for the Secondary Open Pool position but did not receive a job offer. Check the boxes next to the appropriate names.

<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>Viktor</td>
<td></td>
<td>201800489AP</td>
<td>Under Review by Dept/Committee</td>
<td>November 12, 2018 at 02:20 PM</td>
</tr>
<tr>
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<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Note: Notice that there are now only 6 active applicants as 'Application Reviewed, Not Selected' is an inactive workflow state.

2. Hover over Actions and select Move in Workflow.

![Image of the Applicant Manager interface highlighting the actions to move candidates to the next workflow stage.](image-url)
Applicant Manager – Begin process of transitioning applicants – ‘Open Pool – Finalist Interviewed, Not Selected’

1. On the next page, update each candidate’s workflow individually to ‘Open Pool – Finalist Interviewed, Not Selected’.

2. Select Other from the Reason drop-down then enter a rationale in the Explanation box, explaining why the candidate is not the top choice for this position. When ready click Save Changes at the bottom of the page.
1. Once all other applicants/candidates have been transitioned into final workflow states, click on the requested hire’s first name.
1. While in the candidate’s job application, hover over the Take Action On Job Application button and select Recommend for Hire - EOC (move to Recommend for Hire - EOC) near the bottom of the drop-down list.

Note: To ensure that this individual (hire) does not get copied over to any future Secondary Open Pool Postings, navigate back to the General Open Pool Posting and transition this candidate into the workflow state Hired for Pool Position.
1. In the pop-up box, select Other from the Reason drop-down menu then enter in a detailed rationale for the request. Ensure you mention somewhere in your rationale that an interview was conducted to alert OEO that an interview took place outside the TMS. If this individual has previously worked for the department and no interview was conducted as they have already previously been vetted, be sure to mention this.

2. When ready, click Submit.
1. The EO Coordinator will review the hire request then transition it forward to OEO for final review and approval.
1. OEO will review the request and if everything looks good, transition the candidate into the workflow state Approved Recommend for Hire.
Hello Test User

Ginny [redacted] has been placed in the Approved Recommend for Hire status for the Research Associate II - TMS Lab position.

As the Hiring Authority you will need to start the Hiring Proposal for Ginny [redacted].

For instructions on how to start the Hiring Proposal please see the How to Initiate and Complete the Hiring Proposal training guide: https://oeo.colostate.edu/media/sites/144/2017/05/CSU-How-to-Initiate-and-Complete-the-AP-Hiring-Proposal.pdf

For help drafting an Offer Letter, please view the templates listed on the Provost's website located here (Note: The templates are located halfway down the page under the header 'Offer Letter Templates'): http://provost.colostate.edu/faculty-administrative-professionals/

Job Title: Research Associate II - TMS Lab
Position #: 024680.0001
Posting #: 201800489AP
Department: College of TMS Training

Thank you,

Office of Equal Opportunity
oeo@colostate.edu
970-491-5835

Note: Once the hire request has been approved, the Hiring Authority will receive an email alert from the system. At this point, the Hiring Authority may start the process of creating a Hiring Proposal. For additional help on how to start the Hiring Proposal, please see the Hiring Proposal guide.
Need further help?

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

www.oeo.colostate.edu/talent-management-system-tms

For additional help, contact Talent Acquisition at:
(970) 491-5836
or
email TA at hr_ta@colostate.edu