

CSU Talent Management User Guide How to Request Letters of Recommendation in TMS



Last Updated: 5/28/2019

The reference collection tool in the TMS is a valuable resource for search committees. It is possible for the system to:

- Collect names and contact information of references
- Automatically solicit letters of recommendation at predetermined workflow states
- Update an applicant's workflow state to indicate that all of their letters of recommendation have been submitted.

The following slides will demonstrate how to use this resource when creating new Posting requests.



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	Colorado Este	User Group:	,
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	Position Descriptions / Admin Professional/ Research Professional / Academic Success Coordinator		
	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. Position Description: Academic Success Coordinator (Admin Profese Professional)	 Print Preview Print Preview (Employee View) Create Posting from this Position Description View Supervisor Modify AP Position 	
	Current Status: Active		
	Position Type: Admin Professional/ Research Professional Department: College of TMS Training (0000)		
	Summary History Associated Classification		

Colorado State University

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Setting up References in TMS – Settings Page

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	Colorado States		User Grou	up: r	•
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	Postings / Admin Professional/ Research Professional/ New Posting 🕸 Note: Most of these fields will pull o	ver from the position description.			
	New Postin [®] 1. Navigate to the 'References' sect	ion on this page.	Create New Posting	Cancel	
	* Required Information				
	Working Title *	Academic Success Coordinator			
	Organizational Unit				
	Division *	Provost/Executive Vice President (1001DV)			
	Academic/Reporting Area *	College of TMS Training (0000RA)			
	Department *	College of TMS Training (0000)			
	Interest Card				
	Interest card category				
	Academic Advising / Counseling				



Setting up References in TMS – Settings Page (cont.)

Note: If you will be soliciting **letters of recommendation**, you will need to update the three fields below. Otherwise, if the committee only wishes to use the reference tool to **collect names and contact information** of applicant references, please proceed to page 16 and leave this section unaltered.

The following slides will go over fields 1, 2, and 3.

Vhen an application is submitted for this job, it should move to which state in the Candidate rocess workflow?

References			
Reference No	tification	1.	.
			Request References to submit Recommendations when candidate reaches selected workflow state?
Recommenda	ation Workflow	2.	T
			When all Recommendations have been provided, move to selected workflow state?
Recommenda	tion Document Type	3.	No Document
			Allow a document upload when a reference provider submits a Recommendation?

Online Applications

Accept online applications?

Special offline application instructions

References will not be contacted without prior notification of candidates.



Setting up References in TMS – Settings Page, Field 1

References	
Reference Notification	Under Review by Dept/Committee
	Request References to submit Recommendations when candidate reaches selected workfl state?
Recommendation Workflow	v
1. The 'Reference Notificatio system will <u>automatically</u> se	Irop-down menu allows the committee to select which applicant workflow state the out emails to references, requesting them to submit their letters of

In this example, the 'Reference Notification' workflow state is set to 'Under Review by Dept/Committee', meaning that as soon as an applicant 'certifies and submits' their application (applies), an email from the system will **automaticity** be sent out to all of their references asking them to upload a letter of recommendation. An example of the email that is sent out to references can be found on page 23.

If the committee would like more control over when reference request emails are sent out, OEO suggests selecting the '**Check References**' applicant workflow state. Once an Applicant Manager moves an applicant into this selected workflow state, the system will **automatically** notify references. This is a good solution if the committee anticipates a large applicant pool and doesn't wish to solicit letters or recommendation for every applicant, this allows the committee to control when emails are sent from the system.

The committee may also decide to **leave this field blank** (if you choose to leave this field blank, please proceed to page 21 for instructions on how to send out reference request emails <u>manually</u>). Leaving this field blank ensures that reference request emails will never be sent by an accidental workflow transition in the system.



Setting up References in TMS – Settings Page, Field 2

Under Review by Dept/Committee
Poquest Peferences to submit Percemmendations when candidate reaches selected wor
state?
All Reference Letters Submitted
1

2. The 'Recommendation Workflow' drop-down menu allows the committee to select the desired workflow state applicants will automatically transition into once all their letters of recommendation have been received.

In this example, the 'Recommendation Workflow' workflow state is set to 'All Reference Letters Submitted', meaning that as soon as an applicant receives **all** of their letters of recommendation from their references, the system will automatically update their workflow state to 'All Reference Letters Submitted'.

There are pros and cons to using this field.

Pro: If a committee is considering a '**complete application**' to **contain all letters of recommendation**, selecting 'All Reference Letters Submitted' makes it easier to determine who has all their letters and who doesn't, without having to go into each individual job application. Please see page 14 for instructions on how to fill out the Special Instructions Summary if a committee is requiring all letters of recommendation for a complete application.

Cons: The system will automatically update workflow states for all applicants once they receive all of their letters, even for '**Inactive applicants**'. If an applicant was already placed in the 'Determined did not meet minimum qualifications' and they were to receive all their letters of recommendation, the system would automatically move them back into the **active** workflow state 'All Reference Letters Submitted'.

Unless letters of recommendation are required for a complete application, OEO recommends leaving the 'Recommendation Workflow' dropdown **blank**. This will ensure that applicants remain in the same workflow state once all their letters have been received.



Setting up References in TMS – Settings Page, Field 3

References	
Reference Notification	Under Review by Dept/Committee
	Request References to submit Recommendations when candidate reaches selected workf state?
Recommendation Workflow	All Reference Letters Submitted When all Recommendations have been provided, move to selected workflow state?
Recommendation Document Type	3. No Document ▼ No Document Reference Letter
Opline Applications	

3. The 'Recommendation Document Type' drop-down allows the committee to select which document, if any, references will be able to upload through the reference portal. If 'No Document' is selected, a reference will only be able to provide their name, and how they know the individual in the reference portal. If 'Reference Letter' is selected, reference's will be required to upload a letter of recommendation through the reference portal. If the committee is soliciting letters of recommendation, 'Reference Letter' **must** be selected.





Setting up References – Special Instructions to Applicants

Note: The 'Special offline application instruction' field allows the committee to enter in explicate directions to applicants which will be displayed at the top of the job posting when applicants apply. These 'directions' should address what's needed to apply e.g. Resume, Cover Letter, References etc.

If the committee is choosing to solicit letters of recommendation from references, **this will need to be communicated to applicants in this field.** If a committee is also requiring all letters of recommendation to be uploaded for a application to be considered complete, this will need to be stated here as well.

A good example of language to use in this field if a committee is requiring all letters of recommendation for a complete application is:

"A complete application includes: Cover Letter which addressed the minimum and preferred qualifications, resume, and the names and contact information for three professional references. References will be contacted immediately upon submission of application and will receive an email with a link to submit their letter. For an application to be considered complete, all three letters of recommendation must be submitted prior to (one week after full consideration date). No mail in applications or letters will be accepted."

Accept online applications?

Special offline application instructions

Note: This field also shows up on the 'Posting Details' page of a posting. Whatever is entered in this field on the 'Settings' page will pull over to the posting details page. You may edit the content of this field in either location. References will not be contacted without prior notification of candidates.



The following page skips straight to the 'Reference' tab of a Posting.

For continued directions on how to fill out the posting request in it's entirety please see our AP Posting guide, starting on page 9 located here:

https://oeo.colostate.edu/media/sites/144/2017/05/CSU-Create-and-Edit-an-Admin-Pro-Job-Posting.pdf

For continued help with Faculty Postings, please see our guide, starting on page 10 located here:

https://oeo.colostate.edu/media/sites/144/2017/05/CSU-Create-and-Edit-a-Faculty-Job-Posting.pdf



Setting up References in TMS – References Tab

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	Home Postings -				Shortci	uts 👻	
	Postings / Admin Professional/ Resea	arch Professional / Academic Su	uccess Coordinator (Draft) / Edit: Posting Details				
	Editing Posting	Posting Details					
	Posting Details	Posting Details			Save	Next >>	
	Essential Job Duties						
	Position Budget Inform	✤ Check spelling					
	Alternative Appointmen	* Required Information	ormation				
	Sackground Check Requi	This information is pulled	OTT ALIOFT				
	Supplemental Questions	Classification Title	Prof/Indiv Contrib II				
	Qualification Groups	Classification Code					
	Applicant Documents	Classification Code	ACPI02				
	Search Committee	Salary Grade					
	🗢 Evaluative Criteria	Min Salary	Note: From the Posting Details page, sele	ct			
	🛇 References	Mid Salary	the 'References' tab from the left side mer	iu.			
	Posting Documents	Mid Salary					
	Summary	Max Salary					
		Position Informa	tion				
		Position Number	012345.0001				



Setting up References in TMS – References Tab

allows the committee to nter when applying (go to to applicants when apply <u>mmendation</u> from refere erences' fields will need emailed, requesting these to	select the amount of references o page 19 to view how the ing). If you are going to be nces, the 'Minimum and d to <u>match</u> .	Save << Prev Next >> Cants to submit as part of their application. Applicants f the posting) will have their submitted references plicant. References will click on a link and be guided to		
the applicant portal will ere th	ney will fill out a standard form and/or upload a	a letter of recommendation.		
Neieren des				
Minimum Number of References				
Maximum Number of				
References		Note: Select 'Yes' from the 'Accept		
Accept Reference		if you are soliciting letters of		
Letters	_	recommendation from applicant		
Last Day a Reference Provider Can Submit Reference Letter This date must be a minimum of one week AFTE.		references, otherwise select 'No'.		
	allows the committee to nter when applying (go to to applicants when apply <u>mendation</u> from refere erences' fields will need the applicant portal will ere the References Minimum Number of References Maximum Number of References Accept Reference Letters Last Day a Reference Provider Can Submit Reference Letter	Accept Reference Letters Accept Reference Letters This date must be a minimum of one week AFTE		

Note: The 'Last Day a Reference Provider Can Submit a Reference Letter' field allows the committee to select a "cutoff" date for references. If a reference were to try and access the reference portal past this date, the link would no longer work and the reference would not be able to supply information. <u>OEO does not recommend utilizing this feature</u>, meaning the reference link will remain 'active' until the reference uploads their information. If the committee does wish to select a date, this date must be at least **one week after the Close Posting Date** to allow for reference letters to be uploaded for late applicants. By leaving this field blank, it in no way extends the posting as this date only applies to references.



The following slides show examples of:

Page #

•	Applicant's view when applying19
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•	Email sent to applicants letting them know that their references have responded27
•	View of Job Application page in TMS once all letters have been received



Applicant Portal – Reference Section

	Application for Instructors	- Open Poo <mark>: Professional References</mark>					
🕷 Home	<< Prev	Save changes	Next >>				
Q Search Internal Jobs							
Q Search Jobs	Professional References	Note: This is the 'Profes	sional Reference' section of a job				
New Job Alerts	Go	application. Everyone th	nat applies to a position through				
▼ Your Bookmarked Postings	Please enter your references by click application by selecting the page fro	_{ing the Add} the CSU Jobs website v m the dropd	the CSU Jobs website will be taken to this page. Next button or variation of the company and clicking GO button every 60 minutes in order to avoid losing your data.				
🖺 Your Applications	Please double check that your refere a unique email address for each refe	nce email addresses have been entered correctly. Yo rence entry. Entering the same email address for ev	ou will not be able to change these once you certify a rery reference will cause the system to error. If one o	nd submit your application. Please enter of your references is no longer available			
🝃 Your Documents	to provide a recommendation, pleas	- ,					
& Account Settings	Required fields are indicated with ar	a asterisk (*).					
Demographic Info	Professional References						
ບ Logout Test	Name of Reference		*				
? Help							
	Title		*				
	Organization		*				
	Relationship		*				
	Contact Phone		*				
	Contact Email	Note: The 'Add Profession	al References Entry'				
	Remove Entry?	button will disappear once references have been enter	the maximum number of ered by the applicant.				
	Add Professional References Entry						



Job Application – View in TMS (available to Search Committee Members and Applicant Managers)

Job application: Harry Potte Current Status: Under Review by Dept/Committee Application form: Faculty Application		Take Action On Job Application ✓ ★ View Posting Applied To				
Note: After an applicant certifies and submapplication' page will be created for them in Applicant Managers and Committee Membrane the applicants first name from the 'Applica	oplies), a 'Job nly visible to by clicking on ng.	▼ Preview Application				
United Kingdom (Great Britain) Username: hpotter12						
Note: In the example from page 11, we se	t up 'field 1' on the set d and transitioned into	ings page to solicit letters the workflow state 'Unde	of recommendation from ar Review by Dept/Committee' As			
you can see, the system has already notifi	ed (sent out reference	request emails) Harry Po	tter's references automatically.			
Training (0000)						
Summary Documents Recommendation	s (0 of 3) History R	ports				
Reference Requests						
Name Email	Notified?	Respor	nded?			
test test@gmail.com	05/28/2019 02:51 PM	No	Resend			
test test@gmail.com	05/28/2019 02:51 PM	No	Resend			
test test@gmail.com	05/28/2019 02:51 PM	No	Resend			
Recommendations						

No recommendations have been submitted for this application.



Job Application – How to send out reference request emails manually

Job a	pplication: Hermione	Granger (Faculty)		Take Action On Job Application 🗸
Current S Applicati	Status: Under Review by Dept/Committe on form: Faculty Application	e	· · · · · · · · · · · · · · · · · · ·	★ View Posting Applied To
Note: If blank of send o	f the committee decides to leav on the settings page, they will r ut reference request emails ma	re 'field 1' need toone Gran <mark>ger</mark> anually.lanager		Preview Application
London, 1	NA 00000			
Note: In by Dep	n the example, applicant Herm ot/Committee'. The syst <u>em has</u>	ione Granger has applied an <u>not</u> notified her references.	d is currently in the work	flow state 'Under Review
Summary eference Re	(0000) / Documents Recommendation	is (0 of 3) History Reports		
Name	Email	Notified?	Responded?	
est	test@gmail.com	No	No	Send
est	test@gmail.com	No	No	Send
est	test@gmail.com	No	No	Send
ecommend	lations			



Job Application – How to send out reference request emails <u>manually</u> (cont.)

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Job application: Hermione Granger (Faculty)

Current Status: Under Review by Dept/Committee Application form: Faculty Application

Full na Addre	ame: Hermione Granger ss:	Created b Owner: A	y: Hermior	ne Granger anager				
123 Ma	ain St.							
Londo	n, NA 00000							
United	Kingdom (Great Britain)							
Userna Email: Positio	Username: hgranger Email: hgranger@gmail.com Position Type: Faculty		Note: Once the emails have been sent, the 'Send' button will display as 'Resend'. You can click on the 'Resend' button if a reference or applicant requests that the email be sent out again. Notice how the 'Notified' column time stamps when the emails were sent out to references.					
Trainir	ng (0000)							
Summ	ary Documents	Recommendation	s (0 of 3)	History F	eports			
Reference	Requests							
Name	Email		Notifie	d?	Responded?			
test	test@gmail.com		05/29/2	2019 01:06 PM	No	Resend		
test	test@gmail.com		05/29/2	2019 01:06 PM	No	Resend		
test	test@gmail.com		05/29/2019 01:06 PM		No	Resend		
Recomme	ndations							

No recommendations have been submitted for this application.



Take Action On Job Application 🗸

View Posting Applied To

Proviou Application

System email sent to References



Hello.

Colorado State University

Note: This is the system email that is sent to references. The email will include an unique link for the references to follow to provide further information and upload their letter of recommendation.

Hermione Granger has applied for the position of Instructors - Open Pool, at Colorado

For more information about this position, please refer to the position information below or visit: http://colostate-sb.peopleadmin.com/post ngs/65755

Position Information:

Title: Instructors - Open Pool Position Summary:

Temporary, part-time instructor positions may become available throughout the year in any of the five academic departments listed below Areas include: Defense Against the Dark Arts, Divination, Muggle Studies, Charms and Herbology.

Instructions for completing and submitting the reference:

- Please visit the reference portal at http://colostate-sb.peopleadmin.com/ref/new/1050092/636f5efd1119a89809cc0104bf5534e6 If you are unable to click this link, please copy and paste the link, with no spaces, into your browser address bar.
- 2. On the reference submission web page, please fill in the various fields and upload your letter of recommendation.
- 3. Click "Submit" at the bottom of the page.

Please upload your letter of recommendation as soon as possible upon receipt of this email. See the Applicant Special Instructions below for information regarding recommendation letter requirements.

Applicant Special Instructions:

To add your name to the applicant pool, please upload individually a letter of interest, Curriculum Vitae, sample syllabus, and contact information for three professional references that can speak to your teaching. Please indicate in your letter of interest courses you are qualified to teach and your experience teaching students. This pool expires on May 21, 2020. Individuals wishing to be considered beyond this date must reapply. References will not be contacted without prior notification of candidates.

You will receive a confirmation email upon the submission of your letter. If you do not receive a confirmation email, please check your spam folder before contacting the Search Contact listed below.

Thank you, Office of Equal Opportunity

If you have a concern or question please DO NOT reply to this email. Instead contact: Becca McCarty, becca.e.mccarty@colostate.edu, (970) 491-5836.



Reference view – Reference Portal



Jobs @ Colorado State University

Submit a Recommendation

Required fields are indicated with an asterisk (*).

Applicant Information

First Name Hermione

Last Name Granger

Reference Information

Name test

Email test@gmail.com

Phone Number

Note: When a reference clicks on the unique link located in the system email, they will be taken to this page. Here they will enter information into various fields pertaining to how they know the applicant.

Employer



Reference view – Reference Portal (cont.)

Required Documents for this Recommendation

Upload Reference Letter

- Upload a document in any of the following file formats: .doc, .docx, .pdf, .rtf, .rtx. txt, .tiff, .tif, .jpeg, .jpe, .jpg, .png, .xls, .xlsx
- If your document is not in one of the above formats, please convert it to a PDF before uploading it.
- Encrypted or password-protected documents are not supported.

Name:

Reference Letter 05-29-19 13:29:01

Description (optional):

File to Upload: Choose File No file chosen	Note: If 'Reference Letter' was selected from the 'Recommendation Document Type' drop-down menu (field 3) found on the settings page, this bottom section will appear for the reference, allowing them to upload their letter of recommendation.	
Alternatives		
Write Reference Letter		

Submit

Human Resources (970) 491-6947

Office of Equal Opportunity (970) 491-5836

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We have received your recommendation letter for Hermione Granger who has applied for the Instructors - Open Pool position at Colorado State University. Thank you for completing this information. We can now continue with the review of this candidate, incorporating the valuable information provided.

Thank you,

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

Note: Once the reference has submitted their recommendation through the reference portal, they will receive this automatic system email.



System email – Sent to Applicant after letter is received



Dear Hermione,

This is to inform you that we have received a response from one of your references for your application to the Instructors - Open Pool position with Colorado State University. The search committee is in the process of reviewing applicants and you will be notified if selected for further consideration.

To check on the status of your references, please see the help guide located here: https://oeo.colostate.edu/media/sites/144/2017/05/CSU-How-to-check-the-status-of-your-recommendation-letters.pdf

If you have any questions or concerns regarding your references/application please contact the Search Contact: Benette Wallace, benette.wallace@colostate.edu.

Thank you,

Office of Equal Opportunity oeo@colostate.edu 970-491-5836 Note: Once the reference has submitted their recommendation through the reference portal, the applicant will receive this automatic notification email from the system.



Job Application – View in TMS once all letters are received (available to Search Committee Members and Applicant Managers)





Need further help?

For additional help, contact the Office of Equal Opportunity at: (970) 491-5836 Or <u>oeo@colostate.edu</u>

