Applicant Tracking System’s Training
Staffing Coordinator Guide for Support Staff Positions

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# Table of Contents

STAFFING COORDINATOR OVERVIEW ___________________________________________ 5
HIRING PROCESS OVERVIEW ___________________________________________________ 6
SUPPORT STAFF INITIATING POSITION REQUEST IN EBS _____________________________ 7
  Security Roles __________________________________________________________________ 7
POSITION REQUEST GENERAL NAVIGATION ________________________________________ 8
  Saving the Form __________________________________________________________________ 8
  Navigating the Form __________________________________________________________________ 8
  Copying Information into Forms __________________________________________________________________ 8
  Entering Information into Forms __________________________________________________________________ 9
SUPPORT STAFF ________________________________________________________________ 10
  Getting Started ___________________________________________________________________ 10
  Position Create/Copy/Change ___________________________________________________________________ 10
COMPLETING THE FORM __________________________________________________________ 11
  Organizational Assignment __________________________________________________________________ 11
  Administrative Address ___________________________________________________________________ 11
  Cost Distribution ___________________________________________________________________ 11
  Position Attributes __________________________________________________________________ 12
  Posting Details __________________________________________________________________ 12
  Position Description __________________________________________________________________ 13
  Committee Information __________________________________________________________________ 16
  Advertising/Sourcing Options __________________________________________________________________ 16
Attachments and Comments __________________________________________________________________ 16
Summary Form __________________________________________________________________ 17
Review Form __________________________________________________________________ 17
  What happens next __________________________________________________________________ 17
APPLICANT TRACKING SYSTEM _____________________________________________________ 18
  Access the Applicant Tracking System __________________________________________________________________ 18
  Applicant Tracking System Navigation __________________________________________________________________ 18
MANAGING JOBS __________________________________________________________________ 19
  How to Find Your Jobs – Primary Staffing Coordinator and Staffing Coordinator Backup 1 ____________ 19
How to Filter the Manage Jobs Screen .............................................................. 21
How to Find Your Jobs – Primary Staffing Coordinator and Staffing Coordinator Backup 2 21

JOB CARD ............................................................................................................. 23
Job Card – Position Info Tab ............................................................................. 23
Job Card – Notes Tab ......................................................................................... 23
Job Card – Documents Tab ............................................................................... 24

MANAGE APPLICATIONS .................................................................................. 27
Bulk Actions ....................................................................................................... 28
Bulk Compile and Send ..................................................................................... 30
Applicant Card .................................................................................................. 32

CHANGING APPLICANT STATUSES ............................................................... 33
Confirm Status Change ..................................................................................... 35

EVENTS (OPTIONAL FUNCTIONALITY) ............................................................ 39
Create a New Event ............................................................................................ 39
Create Timeslots for the Event ......................................................................... 40
Invite Applicants Using Bulk Move .................................................................. 42
Manage Events ................................................................................................... 45

REFERENCES .................................................................................................... 48
Request Reference Contact Information ......................................................... 48
Manually Entering Reference Contact Information ......................................... 49
Invite Referees To Conduct Reference Letter/Reference Check ...................... 49
Uploading a Confidential Reference Letter ...................................................... 52
Manage Reference Check Requests .................................................................. 52

OFFERS ................................................................................................................. 54
Recommend Applicant for Hire ......................................................................... 54
Offer Card/Hiring Recommendation .................................................................. 54
HR Approval & Making the Offer ..................................................................... 60
Modification to Offer Documents after Offer Acceptance ............................... 61
Monitoring or Managing All Offers .................................................................. 62

APPENDIX .......................................................................................................... 63
Shortlisted Applicants (Optional) ..................................................................... 63
<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assigned Applications (Optional)</td>
<td>64</td>
</tr>
<tr>
<td>Offers that Require Department Approval</td>
<td>65</td>
</tr>
<tr>
<td>Reporting</td>
<td>66</td>
</tr>
</tbody>
</table>
STAFFING COORDINATOR OVERVIEW

The Applicant Tracking System, PageUp, provides a set of tools for managing job postings and applicant information. In addition, interviews and other events can be scheduled, offers can be initiated and tracked, and employee onboarding can be managed, all in one location during and after the hiring process. It provides oversight into the numerous organizational units in each area and empowers teams to organize and monitor a large volume of postings and applicants.

The Primary Staffing Coordinator will have the main responsibilities of a job posting and by default, will receive all system-automated emails. Backup Staffing Coordinators will perform many of the same tasks as the Primary Staffing Coordinator; however, those tasks may be accessed differently. Those will be noted throughout this guide.

Staffing Coordinators can complete the following tasks within the Applicant Tracking System:

- Review and manage job postings and their statuses
- Manage and communicate with applicants
- Schedule interviews and other events
- Check applicant’s references
- Make offers
- Manage employee onboarding tasks

For consistency within MSU, we will use the term **Applicant Tracking System (ATS)** as the name of our system for recruiting and hiring. The software is called PageUp. These terms may be used interchangeably; however, all training materials will reference the ATS.
HIRING PROCESS OVERVIEW

1. Complete a Position Request Form via the Post Support Staff Position link in EBS.
   - The Position Request Form will route for department approvals first and end at MSU HR.
   - Once MSU HR has approved the form, the posting will be finalized by the HR Analyst in the ATS. The Primary Staffing Coordinator and Staffing Coordinator Backup 1 on the posting will receive an email notification when the posting is accessible within the ATS.
   - The posting will open for application submissions based on information entered on the form.
   - Support staff postings are open for applications submissions on Wednesdays at 1 p.m.

2. Review applications.
   - Applicant lists are forwarded to the department no later than the following Monday of the posting close date. Once MSU HR has forwarded the applicant list, applications can be reviewed.
   - Applicants that you will not be moving forward in the process should be dispositioned into an Interview not selected application status in the ATS.

3. Conduct Phone/Skype interviews, if desired.

4. Conduct interviews.
   - Once interviews are complete, change the applicant status to Interview 1 Completed (or Interview 2 Completed) in the ATS. Enter the interview date on the Confirm status change page next to Interview 1 (or Interview 2).
   - Change the position status to Interview.

5. Select a candidate for hire and change the applicant status to Hire Recommendation.
   - Complete a Hiring Recommendation for the candidate in the ATS.
     - Upload the final, signed offer letter to the Hiring Recommendation.
     - Complete the approval process.
     - Submit the approval process, making the HR Analyst assigned to the posting the final approver.

6. Once MSU HR has approved the Hiring Recommendation, a verbal offer can be extended to the candidate.
   - In the event that the candidate does not accept the verbal offer, the applicant status needs to be changed to Offer Declined on the Hiring Recommendation.

7. Once the candidate has accepted the offer, change the applicant status to Offer – Submit Online Offer to Candidate.
   - MSU HR will change the applicant status to Offer Made Online.
   - Note: The candidate must “accept” the offer through their Applicant Portal in order to initiate the Onboarding Portal. Do not change the application status into Offer accepted on behalf of the candidate.

8. Disposition all candidates who were not selected into the appropriate application status.
SUPPORT STAFF INITIATING POSITION REQUEST IN EBS
The ATS will NOT be used for the Position Request. It will continue to be submitted via the Position Request form in EBS.

Security Roles
The process for posting a position begins in the HR/Payroll System and moves to the ATS. There are different security roles for each.
- HR Unit Administrator – Support Staff is required to use the Post Support Staff Position link in the EBS Portal.
- Staffing Coordinator – Manages the postings once in the ATS, which is linked from the EBS Portal.
POSITION REQUEST GENERAL NAVIGATION

Saving the Form

Save a draft at any time by clicking Save Draft. The draft is not saved until the window is closed.

Note: It is recommended to save a draft of the form rather than simply closing the window. This will save the entered information.

When initially creating the form, the Save Draft functionality ONLY commits the information that has been entered IF the window is closed. It does not protect the information from being lost if the 30-minute timeout is reached. Once the draft is opened again from the HR/Payroll Inbox, the Save Draft button does commit changes every time it is pressed.

Navigating the Form

Move through the steps in the process using the buttons provided on the screen. Click Next to validate the information on the screen and advance to the next step.

- If a yellow or green system message is received, click Continue to acknowledge the message and advance to the next step.
- If a red system message is received, the error on the page must be corrected before moving on to the next step.
- Select the Previous button to go back to the previous screen.
- There are two alternate ways to navigate through the form. These may be helpful if the form is started but not all required information is available.
  o Select any step in the Navigation Bar (e.g., Cost Distribution) to go directly to that section.
  o Go directly to the Summary step and enter all the information on one screen.
- All validation occurs after selecting the Check button on the Summary screen.

Here are some additional tips for completing the form:

- Required fields are indicated with an asterisk.
- Press the <Enter> key after typing information into a field to have the system validate it.
- Use the <Tab> key on the keyboard to move from field to field.
- When entering a date, the system automatically formats the field.
- To use a search for a field value, press the F4 key after clicking in a field to open the search window, rather than selecting on the button.
- If assistance is needed at any time, please use the Help icon when within the form or contact the HR Solutions Center for assistance.

Copying Information into Forms

Information can be copied and pasted into fields from any of the following document formats:

- Microsoft Word (*.doc, *.docx)
- HTML (*.htm, *.html)
- Rich Text Format (*.rtf)

The following formatting for these document types will be maintained when pasted into any field with the following tool bar. This formatting will also appear in the ATS.

- Bold text
To ensure formatting is applied to the last line being pasted in, make sure to copy an additional line at the last bullet.

**Note:** Basic formatting is offered as an enhancement to the EBS position request forms. Some users have encountered issues when pasting their formatted content into the forms from another source. Be sure to carefully check formatting on the Review Form page before submitting. If you find formatting issues, you will need to either go back and manually correct spacing within the field(s), or paste your content into Notepad, recopy-paste it into the field(s) and add formatting within the position form.

**Entering Information into Forms**
In several places information is entered into a table format. These tables load with several rows ready for adding data. More rows can be added if necessary with the Add Row button or deleted if appropriate with the Remove Row button.
SUPPORT STAFF
Getting Started
Upon opening the **Post Support Staff Position** tile, the first page collects initial information needed to present the proper questions on the form.

**Position Create/Copy/Change**
From this form, there are three ways to post a position:

- **Option 1: Position Change** – post an existing position including the existing position number, with the option to change certain attributes.
- **Option 2: Position Create** – create a completely new position with attributes determined by the user.
- **Option 3: Position Copy** – post a new position with a new position number, using an existing position as a template, changing attributes as necessary.

**Option 1:** Post an existing, vacant position (*Position Copy* form).
1. To do this, use an existing position as a template in the **SAME Organizational Unit**.
2. Enter **Desired Posting Date**, **Reason for Request**, and **Position**.
   **Note:** When entering the Desired Posting Date, using the current date is advised in order for the position to be posted for the next posting cycle.

**Option 2:** Create an entirely new position (*Position Create* form).
1. To do this, do NOT use an existing position as a template.
2. Enter the Desired Posting Date, Organizational Unit and Job.

**Option 3:** Make a copy of an existing position and post it (*Position Copy* form).
1. To do this, use an existing position as a template in a **DIFFERENT Organizational Unit**.
2. Enter **Desired Posting Date**, **Reason for Request**, and **Position**
3. If the **Reason for Request** is not a **New Position**, then the Personnel Number of the **Employee this position replaces** is required.
COMPLETING THE FORM

For the Position Copy and Position Change forms many of the fields noted below are prefilled and need only to be validated and edited.

Organizational Assignment

1. Click the help lookup within each field to search for a Job and Supervisor.
2. Primary Organizational Unit pre-populates based on responses to previous questions.
3. Search or enter additional department(s) in Second Organizational Unit as needed if the position is shared with other departments.
4. Click Next to continue.

Administrative Address

1. Select a Location ID which will then pre-populate the address.
2. Enter a Room/Suite # and Phone #.
3. If the employee will be working in a location different than the Administrative Address or off-campus, enter an additional Location ID, Room/Suite # and Phone #.
4. If the Work Location is off-campus, indicate that and note which location.
5. Click Next to continue.

Cost Distribution

1. Enter Employment Percent.
2. Enter a fund in the Fund field or search for and select a Fund. 
   Note: Position Cost Distribution information will be the funding information for when the employee is hired.
3. If necessary, search for and select other funding elements. If a WBS Element (sub-account) does not appear in a row after the account number is entered this means that there is more than one option for that account. If no sub-account is entered, WBS Element defaults to “NO_SUB-ACCOUNT.”
4. Enter a funding percentage in the Percentage field.
5. Repeat the above steps for each additional funding line.
6. Under Planned Pay, the appropriate information will populate for either salaried positions or positions paid hourly.
   a) For salaried positions, select from the drop-down whether an Annual Salary or Salary Range will be provided.
      i. Enter the relevant rates. If Salary Range is chosen, the Minimum Salary will prefill based on the classification.
   b) For positions paid hourly, select from the drop-down whether the Hourly Rate or Hourly Range (Clerical-Technical positions only) will be provided.
      i. Enter the relevant rates.

Note: These selections will only appear for the appropriate support staff positions.
Position Attributes

Enterprise Structure

1. **Is this a union position?** Select Yes or No from the drop-down menu to answer the question.
2. If it is not a union position, indicate whether the position has a special agreement to make the position confidential.

   Note: All other enterprise structure information (Employee Subgroup and Personnel Subarea) is created based on the job that was chosen earlier.

Special Position Designations

1. **Is this a no post position?** Select Yes or No from the drop-down menu to answer the question.
   a) To post the position in the Applicant Tracking System, answer No.
   
   Note: For information on using this form for a preselected position, visit the EBS Support site at https://hr.msu.edu/ebshelp/sspostpositionaro/.
2. **Is this an Off-Date position** (this includes limited term)? Select Yes from the drop-down menu if the position is Off-Date or Limited Term.
   
   Note: Off-Dated positions are only applicable for AP, APSA, CT, EXT and NURS type employees.
   
   Note: Limited Term positions are only applicable for CTU.
3. **Is this a Flex Position?** Select Yes or No from the drop-down menu to answer the question.
   a) If a flex position is desired, **Select flex type**.
4. Enter a **Description of Flex Period**.
   
   Note: This option is available for APA and APSA Positions only.
5. For 1585 postings reporting to Infrastructure Planning and Facilities, indicate a **Crew Designation**.

Duties

1. Enter a **Percent** in the **Percentage** column of the **Duties column**.
2. Enter a **Description** of the corresponding duty.
   
   Note: The percentages should be broken down and provided in each line space. HR does not accept forms that only indicate 100% with a description of “See Attached.”
   
   Note: Entries must total 100%.

Posting Details

1. **Working/Functional Title** (prefills with the position title; e.g., “Admissions Supervisor”).
2. Enter a **Desired Posting Begin Date**.
3. Indicate if this is an **external** posting.
   a) If **Not**, then select **no** from the drop-down menu.
   b) If **Yes**, then select **yes** from the drop-down menu.
4. Would you like to post the salary provided? **Select Yes or No**
   
   If you select **Yes**, either the single salary value, salary range with text “Salary Commensurate with Experience”, single hourly rate or hourly range with text “Salary Commensurate with Experience” (Clerical-Technical positions only) will display on the Careers @ MSU website. If you select **No**, only the text “Salary Commensurate with Experience” will display in the salary field of the Careers @ MSU website.
Position Description

There are tabs within the Position Description section to quickly access the Posting Snapshot, Position Summary, Qualifications, Work Hours, Physical Demands, Health Risks and Applicant Instructions. There is also an additional scroll bar for the Position Summary section within this section.

1. **Posting Snapshot** (Text field – 400 character limit) - Displays on the Careers @ MSU website. Use this 2-3 sentence summary to pique the interest of applicants so they will check into the posting and learn more about the process.

2. **Position Summary**, enter the text exactly as it should appear in the posting.

   a) Enter a Working/Functional Title if desired (e.g., Chairperson, Marketing)

   **Note:** The Position Summary has a tool bar to modify the text within to copy and paste text, modify the formatting of the text and spellcheck the text. See the screen shots below.
3. Qualifications
   a) **Unit Required Education/Experience** *(Text field – no character limit)*, some positions may have a minimum defined. Specify a subject area in the box provided if required.
   b) **Desired Qualifications**, enter the text exactly as it should appear in the posting.
   c) Indicate the **Department website** if desired.
   d) Indicate any **Required Application Materials** such as cover letters, resumes, etc.
   e) The **Special Instructions to Applicant** field can be used to provide additional information to applicants. Enter the text exactly as it will appear in the posting.
   f) **Note**: If the applicant is required to provide references at the time of application submission, indicate this in **Special Instructions to Applicant**, along with the number of references required. Reference contact information can also be collected from the applicant later in the process. If this is the case, note that references are not required at the time of application.

**Note**: The Position Summary section has a tool bar to modify the text within to copy and paste text, modify the formatting of the text and spellcheck the text. See the screen shots below.
Note: When copying and pasting information into the position summary the following errors may occur. If images are not compatible the error, “Images should not be pasted” will appear. If the copied text is using headers 1, 2 and 3 the following error will appear, “Error Message Text...The content cannot be pasted with Table, Heading 1, Heading 2 or Heading 3 formatting.” To correct the heading error modify your headings to headers 4 and higher.

4. Work Hours, specify the hours:
   i. Standard (8-5)
   ii. Non-standard
   iii. Variable

5. Physical Demands, select Yes or No if the duties of this position involve physical demanding work requiring lifting 50 pounds or more with frequent lifting and/or carrying of objects weighing 25 pounds or more. 

   [Link to MSU Occupational Health]

   Note: If Yes, summarize the physical demands for the posting in addition to completing the required form for MSU Occupational Health. Completed forms should be sent to MSU Occupational Health.

6. Health Risks, select Yes or No if the duties of this position involves exposure to health risks. If Yes, summarize the health risks for the posting in addition to completing the required form for MSU Occupational Health.

   Note: If Yes, a summary of health risks is required and basic formatting can be pasted into form.

   [Link to MSU Occupational Health]
Committee Information

1. To add Search/Selection Committee members, select External or MSU Employee from the User Type drop-down menu.
2. Indicate which committee member is the Chair by checking the box in the appropriate row.
   MSU Employees who serve on the committee are searchable and their name, title and email address will populate.
3. Indicate Pernr for Affirmative Action Advocate (search function is available).
4. Indicate Pernr for all Staffing Coordinators indicating whether their role is Primary or Backup (search function is available).
5. Is this search being handled by an outside search firm? Select Yes or No to answer the question.
   b) If Yes, indicate the search firm’s name.

For specific instructions for working with a search firm, reference the Unit Agency Guide. You may also direct search firm contacts to the Search Firm Agency Guide for instructions on how they can use the ATS.

Advertising/Sourcing Options

1. Select the best options from drop-down menus in Advertising/Sourcing Options section.
2. The values available are from the Inside Higher Ed. and Higher Education Recruitment Consortium (HERC) websites.
3. This information is required even if the position will be posted internally only. Should the posting need to be opened to the public, the information will have already been collected.
4. Search and select Area(s) of Interest for the MSU Careers website (look up available, choose as many options as applicable).
5. Choose an appropriate Work Location. East Lansing is the default value. If that is not correct click the trash can icon.
6. Employee Group and Full-Time/Part-Time values will pre-populate based on responses to previous questions.
7. Select Work Type.

Attachments and Comments

Based on the information provided, the form identifies required attachments and lists them at the top with a checkbox next to each item required. The “general attachment” option may also be selected to upload additional documents. To upload an attachment:

1. Select the Attachment Type from the drop-down menu.
   a) Click the Browse button to locate and select the attachment.
   b) Click the Upload button to attach the file.
2. Repeat this process for each additional attachment.
3. To delete an attachment:
   a) Select the attachment by clicking the check box.
   b) Click the Delete Attachment button.

Approvers cannot add or remove attachments. If attachments must be changed, the approver should reject the form back to the initiator. Plain text can be pasted in for comments.
Summary Form
A summary of all information is displayed for final review and error checking. Review the completed form, making any needed changes to the information. The field Add Ad Hoc Approver will insert an approval at the first level of the workflow. To review the completed form, click the Check button to have the system perform a final check of the information. Correct any remaining errors.

Review Form
The Generate PDF button allows the creation of a paper or electronic version for departmental files*. The PDF version of the form opens in a new window and can be saved or printed. The PDF will continue to be available in the HR/Payroll System for reference later, even after approval.

The form is ready to be sent for approval. Click the Send button to route the completed form for approval. A confirmation message displays a process reference number that can be used to track the form.

Note: The Process Reference Number is generated only after being submitted into workflow.

What happens next
1. When form is complete and Send button has been pressed, it will route through workflow for necessary approvals. As the form routes for approvals, approvers can view the form by selecting the Generate PDF button. The final approver is HR.
   Note: For detailed instructions on how to access and view the form, visit: https://hr.msu.edu/ebshelp/hrpayrollinbox/reference.html
2. Once approved by HR, the information contained in the form will be uploaded to the ATS.
3. The HR Analyst assigned to the posting will verify and finalize the posting details.
4. The primary Staffing Coordinator and Staffing Coordinator Backup 1 will receive an email when the posting is available in the ATS.
   Note: The Primary Staffing Coordinator should notify the Staffing Coordinator Backup 2 and the Search Committee Members when the posting is available.
APPLICANT TRACKING SYSTEM

Access the Applicant Tracking System

1. Login to the EBS Portal.
2. Click on the Enterprise Business Systems group.
3. Click on the Applicant Tracking System tile.
   **Note:** Be sure to ‘Allow pop-ups’ for the ATS.

Applicant Tracking System Navigation

The Applicant Tracking System dashboard displays a list of bubbles, as well as a Main Menu that can be accessed using this icon 📚.

**Note:** If using the dashboard, click on the appropriate link to the right of the bubbles to navigate to and complete a task.
MANAGING JOBS
As a Staffing Coordinator, you can manage and track job postings in the following ways:

- The Primary Staffing Coordinator can access these tasks from:
  - the jobs open link on the dashboard, OR;
  - the Manage jobs link from the Main Menu. Manage jobs provides the Primary Staffing Coordinator with more functionality.
- Staffing Coordinator Backup 1 can only access postings from the Manage jobs link from the Main Menu.
- Staffing Coordinator Backup 2 can only access postings from the jobs open link on the dashboard.

How to Find Your Jobs – Primary Staffing Coordinator and Staffing Coordinator Backup 1
1. From the Main Menu, click Manage jobs.

2. The Manage jobs screen opens.

3. The Manage jobs screen displays assigned job postings and the following information:
   a) Posting number
   b) Job Title (e.g., Senior Human Resources Professional)
      i. Click the information button to see a quick view of the job posting information. There are additional links here for Notes, Job Preview, Status, HR Analyst details (Owner), Staffing Coordinator details (User), and Applications.
ii. **Click the Job Title** to go directly to the Job Card. See the [Job Card](#) section for additional information.

<table>
<thead>
<tr>
<th>Position info</th>
<th>Notes</th>
<th>Documents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Posting Number (EBIS Ref. #):</td>
<td>495047</td>
<td>Leave blank to automatically create a reference No.</td>
</tr>
<tr>
<td>Link to Position Request Form in SAP:</td>
<td><a href="#">https://SECPORTAL_TEST.EBSP.MSU.EDU/sap/bc/webdynpro/sap/asr_proc_browser_opv?INITIATOR_ROLE=HRASRA&amp;PROC_GUID=0B9509A5173F16ED8D8A325E69E16C721FC85AP-WD-CONF1003=ASR_PROC_BROWSER_OVP_CONFIG</a></td>
<td></td>
</tr>
</tbody>
</table>

**Classification Title:** Secretary II  
**Working Title/ Rank:** Secretary II  
**EBS Job Number:** [Number 20020205](#)  

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c) **Number of Applications:** Click the [number](#) link in the ‘Applications’ column. The [Manage Applications](#) screen opens and displays all applicants for this posting. See the [Manage Applications](#) section for additional information.

<table>
<thead>
<tr>
<th>Posting #</th>
<th>Classification Title</th>
<th>Working Title</th>
<th>Applications</th>
</tr>
</thead>
<tbody>
<tr>
<td>495047</td>
<td>⌁ Secretary II</td>
<td></td>
<td>3</td>
</tr>
</tbody>
</table>

d) **MAU (Major Administrative Unit)**  
e) **Department**  
f) **Subarea**  
g) **HR Analyst**
h) Job status
i) Opening Date: Indicates the date the posting advertisement opens
j) Eligibility Ends: Indicates the date union bidding eligibility ends (previously referred to as the internal close date)
k) Closing Date: Indicates the date the posting advertisement closes
l) Sourced: The green check mark indicates when a job is currently advertised and accepting applicants

To the far right of the screen, each job has the following options:
m) View/Edit the Job Card – Click the Edit button to open the Job Card. See Job Card – Position Info tab in this document for additional information.

n) View/Add Notes - Click the Notes button to open the Notes screen. See Job Card – Notes tab in this document for additional information.

o) Preview the Job – Click the Preview button to open the advertised posting text.
p) View Applications – Click the Applications button to open the Manage Applications screen. See Manage Applications in this document for additional information.

How to Filter the Manage Jobs Screen

1. Results can be filtered by selecting criteria from the Status and Types drop-down menus.
   
   \[\text{If you do not clear your search criteria, it will default the next time you visit the page.}\]
   a) Click Show other search criteria to find additional filtering options. Click Search for results to update.
   
   \[\text{Note: The Current recruitment status is for all active postings. The Non-current recruitment status is for filled and/or cancelled postings. If you are looking for a position that has been filled, you must search with either the All or Non-current recruitment status.}\]

   ![Manage jobs interface]

   b) Click the Hide other search criteria link to hide the additional filtering options.
   c) Click Clear to remove all filtering.

How to Find Your Jobs – Primary Staffing Coordinator and Staffing Coordinator Backup 2

1. From the dashboard, click the link jobs open.

   ![NEW JOB]

   1 - jobs open

2. The My jobs screen opens and displays all jobs assigned to the Primary Staffing Coordinator or Staffing Coordinator Backup 2.
3. The jobs can be filtered using the *Status* drop-down menu to select All, Current or Non-current jobs. Click on the title of the column to sort jobs by:
   a) Position Number
   b) Classification title
   c) Date added
   d) Status

4. Click the **View job** link to open the Job Card. See the **Job Card** section for additional information.
JOB CARD

The Job Card (job posting) can be accessed from multiple locations in the ATS. It displays the following tabs:
- Position info
- Notes
- Documents

Users also have the option to View Applications from the Job Card, and view History and Revision History by clicking on the applicable links.

Job Card – Position Info Tab

The Position Info tab displays job posting information, including:
- Job posting number
- Position details (position summary, details, job duties)
- Users:
  - Search Chair and Committee Members
  - Additional Viewers
  - Staffing Coordinators
  - HR Analyst

Important things to note on this tab:
- Search Chair and Committee Members can be added and/or updated as needed. Save the Job Card after members have been added.

- View or modify additional users to view applicant materials.

Job Card – Notes Tab

The Notes tab is used to add a note that is visible by all users in the system.

⚠️ Please use discretion as these notes will become part of the permanent hiring record.

1. The Notes screen opens and displays already existing notes. Edit or Delete as necessary.
2. To add a note, select Note from the Add drop-down menu. The Add Note screen opens in a new window.
a) Enter the necessary information into the Note field.

b) Add attachments and/or email the note to someone else if necessary.
c) Click Save. The note (and file, if added) will display on the Notes screen for all users to view.
d) To edit or delete an existing note, please contact the individual who created the note.

**Job Card – Documents Tab**

The Documents tab contains documents relating to this job posting, such as the Salary Justification Letter, Screening Matrix, and Interview Questions. The drop-down menu provides the following options:

- Upload document from a computer.
- Download document templates from the ATS Library (offer letter templates or Salary Justification Letter templates.)
- Generate a selection report. All users can generate a search/selection report and/or upload documents, with the exception of search committee members and additional viewers.
Note: Generate a selection report allows an opportunity to start creating the final selection/search committee report. A report template will prefill with job and applicant information and additional information may be added as needed. Save the modified version and upload to the Documents tab. Alternately, units may upload their own selection report to the Documents tab instead of generating the selection report. Visit the HR website to see a Sample Selection Report at https://www.hr.msu.edu/aro/documents/Selection-Report-Sample.pdf.

To Generate a Selection Report:
2. Select an Application status from the drop-down menu. The status selected will display the Search Chair rankings of applicants at that status, if rankings have been provided.
3. Choose the appropriate template and click Okay to generate the report. Click Save.
4. Update the template as necessary and save as a new Word document.
5. See below to add the updated template to the Documents tab to share the final report.

To Upload a File:
2. Click Upload file and select a file.
3. Make a selection from the Document Category drop-down menu.
4. Enter a Title.
5. Click *Save and add another* or *Save and close* or *Close*. The added document(s) will display on the *Document* tab for all users to view.
MANAGE APPLICATIONS
There are a variety of methods to view and manage applicant pools for any job posting:

- From the Job Card, click **View applications** in the left corner of the screen (access for all Staffing Coordinators.)

![View applications](image)

- From the *Manage Jobs* screen, click the **number** listed in the ‘Applications’ column (access for Primary Staffing Coordinator and Staffing Coordinator Backup.)

<table>
<thead>
<tr>
<th>Posting #</th>
<th>Classification Title</th>
<th>Working Title</th>
<th>Applications</th>
</tr>
</thead>
<tbody>
<tr>
<td>495047</td>
<td>Secretary II</td>
<td></td>
<td>3</td>
</tr>
</tbody>
</table>

- From the *Manage Jobs* screen, click the **Applications** (blue person) button (access for Primary Staffing Coordinator and Staffing Coordinator Backup 1.)

![Applications](image)

- From the *Main Menu*, click the **Manage Applications** link (access for Primary Staffing Coordinator and Staffing Coordinator Backup 1.)

![Main Menu](image)

Once on the *Manage Applications* screen, use the **Search** tab to identify the job posting to be viewed:

1. To view the list of active applicants (or those who have not been disqualified from the process) check the box next to *Current application statuses only*. This will remove all applicants who are no longer being considered from the position. Click **Search**.

![Search](image)
2. The **Results** tab displays the selected criteria, along with the following information:
   a) Job Title
   b) Submitted Date
   c) First and Last Name (click to open the Applicant Card)
   d) Status of each applicant (click to change the application status)
   e) Applicant flags

   ![Secretary II (495047)](image)

   f) Additionally, four buttons display on the far right of the screen:
      i. Click the **View Resume** button to view the resume in a new window.
      ii. Click the **Download Resume** button to download and save to the computer.
      iii. Click the **View Answers** button to view the application answers in a new window.
      iv. Click the **View application** link to open the Applicant Card. See **Applicant Card** in this document for additional information.

2. **Bulk Actions**

   The **Bulk Action** function makes it easy to perform an action on one or more applicants at once, such as status update, compiling documents or communication. To perform a bulk action:
   
   1. Group applicants, using the colored checkboxes to the left of their names, to help select and categorize applicants all at once. For example, check the green box next to all applicants to schedule for an interview, the yellow box next to all applicants to disqualify due to education, and the red box next to all applicants to disqualify due to experience.

   **Note:** These color categories are temporary and will clear if the screen is navigated away from or refreshed. Also, the colors have no inherent meaning of their own. They can be used to classify applicants into whatever groups that are needed.

   ![Checkbox example](image)

   2. Once the appropriate box has been checked for each applicant, use the **Select a bulk action** drop-down menu to select an action.
For more detail about the function of these bulk actions, see below:

- **Bulk Assign**
  Used to assign applications to any user in the system for review. This may be used when seeking feedback about an applicant from another user. Assigned users will be sent an email notification and receive a notification in the Applications button on their dashboard. The assigned user can review the application with the option to approve or decline the applicant. Approving or declining the applicant has no effect on the applicant status or progress, but is for informational purposes only. The assignee can view the feedback (approved or declined) under history on the Applicant Card. Only one user can be assigned to the application at a time. Assigning an application to another user will cancel the previous assignment.

- **Bulk Communicate**
  Used for communicating with applicants. Choose from the available templates and edit as necessary, or start from scratch. This function provides the option to set up delayed emails, but be careful as these cannot be cancelled once scheduled.

- **Bulk Compile and Send**
  Used to compile documents of selected applicants into a single PDF. Choose what to pull into the PDF by selecting checkboxes next to relevant information. Once the PDF is generated, download it or email the compiled documents to another user in the system.

- **Bulk Move**
  Used to change the application status of multiple applicants all at once. **Note:** Send emails to applicants if appropriate, but avoid sending emails to internal users as part of the bulk move action. Otherwise, they will receive an email for every applicant moved into this status. To send an email to internal users, use **Bulk Move and Send**, as it will eliminate duplicate emails.

- **Bulk Move and Send**
  Used to change the application status of multiple applicants all at once and send application materials to another user in a single email. This bulk action may be beneficial if other users need to be notified of the status change, but should not receive an email for each applicant.

- **Bulk Reference Check**
  Instead of using an application status to trigger reference letter checks, there is the option to bulk reference letter check. This provides the option to select the appropriate reference check form and modify the email that will be sent to the referee accordingly. The ability to modify the email is one benefit of using **Bulk Reference Check** over using application status.

- **Bulk Send**
  Used to send application materials to another user as separate attachments. For example, if two applicants are selected and the resume and cover letter are identified as appropriate attachments, the user will receive four individual attachments. For most purposes, **Bulk Compile and Send** is a much better way to send materials as it compiles all the documents into one attachment.

3. Once the bulk action is selected, a new window will open with instructions for that specific task. The system allows action to be taken on applicants starting first with the green category, then yellow, then red. The bar at the top shows the color group being worked with.
a) Enter information or choose criteria for the green applicants.
b) Enter information or choose criteria for the yellow applicants.
c) Enter information or choose criteria for the red applicants.

4. Regroup the applicants as necessary and repeat additional Bulk Actions as needed.

**Bulk Compile and Send**
From the *Manage Applications* screen, view and download all applicant documents in one PDF using the **Bulk Compile and Send** function.

1. Check the box next to the name of all applicants to include in the PDF.

2. Select **Bulk Compile and Send** from the drop-down menu.  
   **Note:** **Bulk Compile and Send** does not send the document automatically, but does provide the option to send via email once generated.

3. Select all documents to include and click **Create PDF.**
4. Choose to download the PDF or send to others for review.
   - MSU has limitations on attachment sizes. Please be aware, users may have limitations on the size of attachments that may be shared.
   a) Download the PDF: click the **Download Document** link to open the PDF or right-click on the link to save in a folder.

5. Send PDF to others for review: Enter information in the email form and edit as needed.
6. Click Okay to send the email and return to the View Applicant screen.

**Applicant Card**

The Applicant Card displays the following information (see full screenshot below):

1. Applicant Profile
2. Applications
3. Under the Applications heading, click Form and/or Resume to view applicants’ answers and resume information.
4. History

**Note:** Filter History by selecting criteria from the Item and Job drop-down menus. The filter is automatically applied when selected and the information below is updated. The History section can show users important information about the applicant and actions taken during the process, including the following:

a) **Item: Notes:**
   i. Status changes and who changed the status.
   ii. The reason the applicant provided when declining an event booking or offer.

b) **Item: Bookings:** Details of event bookings

c) **Item: Communication:** Emails that have been sent to the applicant

d) **Item: Documents:** Documents associated with that application (i.e., resume, reference letters, offer contracts)
5. Click the Print button in the top right corner to print the application.

CHANGING APPLICANT STATUSES
Application statuses can be changed individually or using bulk actions. Refrain from using bulk actions for the following statuses, as information specific to that applicant must be captured on an individual basis:

- **Interview 1 Completed**: Interview date must be entered
- **Interview 2 Completed**: Interview date must be entered
- **Hire Recommendation**: Triggers the Hiring Recommendation for the applicant
Certain applicant statuses will send an email notification to the applicant through the ATS. You can view the full list of these email notifications on the Applicant Status Emails tip sheet on the HR website at https://www.hr.msu.edu/aro/documents/applicant-status-emails.pdf. To view which email notifications can be modified and which are sent automatically, see the Application Statuses and Email Notifications tip sheet on the HR website at https://hr.msu.edu/aro/documents/applicant-emails-tip-sheet.pdf.

Changing an applicant status individually

1. To change a status individually, click on the Status link for the applicant on the Manage Applications screen or within the Applicant Card.

   ![Manage Applications Screen]

2. Select the appropriate Application status from the Change application status screen and click Next.

   ![Change application status screen]

3. The Confirm Status Change screen displays. See Confirm Status Change for next steps.

Changing an applicant status using Bulk Action

1. Group applicants using the colored checkboxes to the left of their names to help select and categorize applicants all at once. For example, check the green box next to all applicants to schedule for an interview, the yellow for all applicants disqualified due to education, and the red for applicants disqualified due to experience.

   ![Applicant Card]

2. Once the appropriate box has been checked for each applicant, select Bulk Move from the drop-down menu.
3. Select the appropriate status from the drop-down menu and click **Next**.

![Bulk move](image)

4. The **Confirm Status Change** screen displays. See [Confirm Status Change](#) for next steps.

**Confirm Status Change**

The **Confirm status change** screen may contain important guidance information, which will be denoted by the triangle symbol.

Pay close attention to these as they may provide reminders about necessary approvals that need to take place prior to proceeding. For example, you will be reminded to include the HR Analyst as the last approver of the Hiring Recommendation.

![Reminder](image)

This screen will also provide the user with a variety of options. These options will differ based on the type of application status selected. Read on to learn about all possible options:

1. Send an email to applicants and/or customize the email template that displays.
   a) Many applicant statuses are set up with standard email templates that will display when putting an applicant into a status. The purpose of the emails is to keep the applicant up to date on where they are in the process. The email templates can be sent as is or modified, with the exception of merge fields:
      i. The email templates often include merge fields that will pull in information from the job posting so it does not have to be manually entered. Merge fields can be identified by looking for words that display in all caps and are surrounded by brackets. (Ex: `{FIRSTNAME} {LASTNAME}`). Merge fields cannot be modified, but can be removed from the email if desired.
b) If you do not wish to send an email to the applicant, selecting the No radio button at the top of the email will turn off this communication. Conversely, if no template has been provided and you would like to send an email, the Yes radio button will allow the user to create an email from scratch or select from one of the communication templates provided in the drop-down menu.

c) There is also the option to delay the email from being sent to applicants from one hour up to 30 days. 

⚠️ Take caution when utilizing this feature, as this email cannot be modified or cancelled after selecting Move now, which officially changes the application status.

![Email Template]

2. Send an email to internal users.

   a) There is an option to email other users in the ATS. This may be used to update someone on where the process is, or send materials to another user.

   **Note:** If using Bulk Move, the users will receive a separate email for each applicant. To avoid sending multiple emails, use Bulk Move and Send.

   b) Select a user listed on the Job or Offer, or search for someone in the system using Other additional users search function.
3. Enter interview date (when changing applicants into Interview Completed application statuses.)
   a) To enter the interview date, scroll down to the Status table. Enter the interview date in the Date occurred field.
   
   **Note:** Interview dates must be entered for applicants on an individual basis. Do not use Bulk Move when changing applicants into the Interview Completed application status.

4. Select reason (if candidate is being placed into an unsuccessful status.)
   a) Unsuccessful statuses require a ‘reason why’ the applicant is no longer being considered for the position. Choose the most applicable reason from the drop-down menu.

5. Change the job status
   a) When changing an applicant status, a prompt may display, for certain statuses, to update the Job Status at the bottom of the window.
      i. Scroll to the bottom of the page. If being prompted to update the job status, select the Yes radio button. This will update the posting status automatically and is important for reporting.
ii. Click the **Move now** button.

[Update job status from Dept. Review to Hiring Recommendation.

- Yes
- No

**Move now**  **Cancel**  **Spell check**]
EVENTS (OPTIONAL FUNCTIONALITY)
The event function in the ATS is used to schedule phone screens and interviews for applicants. The event must first be created and internal users can be added to the event at this time. Once the event is created, you can then invite applicants to the event via email.

Note: Only a Primary Staffing Coordinator and Staffing Coordinator Backup 1 have the ability to create events for the job.

Create a New Event
1. From the Main Menu, click on New Event.

2. The New Event screen opens and displays the Event details form.

3. Fill in the following fields:
   a) Title
      Note: It is recommended to include the posting number in the title of the event.
   b) Event Type – select video/phone screen or interview.
      Note: Orientation (MSU HR) is listed for MSU HR only.
   c) Venue -- the location where the event is being held.
      i. Add manually by the user.
ii. Use the binoculars to search or add a new venue.

d) Job – connect the event to a specific job; use the binoculars to filter and search.

e) Owner – enter the name of the Staffing Coordinator who will be managing the event information, timeslots and scheduling of applicants.

   **Note:** The owner of the event can be changed in case of emergency by the current owner or the Dean/VP or Dean/VP Delegate through the *Manage events* page.

f) Add event to owner’s dashboard – select the **Yes** radio button for notifications to display on the dashboard.

g) Contact name

h) Public instructions – use for special instructions for the invitees to attend; the invitee can reference the instructions after they have accepted the invitation in their Applicant Portal.

   **Note:** Documents cannot be attached here; however, the user does have the option to attach a document to the email that is sent to the applicant when scheduling/inviting them to the event later in the process.

4. Click **Save** to save the event and move on to creating timeslots for the event.

   **Note:** As soon as **Save** is clicked, the screen changes from *New Event* to *Edit Event*. Event details can be edited on this screen and timeslots can be entered. See [Create Timeslots for the Event](#) for additional information.

---

### Create Timeslots for the Event

1. From the *Edit Event* screen, the *Time slots* form displays.

2. Add bulk timeslots OR add a single timeslot.

   **Note:** For directions on how to format event timeslots, view the “What time format is used for the event functionality in the PageUp applicant tracking system” FAQ on the HR website at [https://hr.msu.edu/aro/faqs/Posting-information.html](https://hr.msu.edu/aro/faqs/Posting-information.html).

3. To **Add a single timeslot**:
   a) Enter Event Date, Start time and End time.
   a) Click **Invite** to invite internal users to the event. (ex: Staffing Coordinators)
      i. Invitees can be listed in all timeslots or assigned one.
ii. Invitees will receive a notification on their dashboard and can monitor who has been booked into each timeslot by clicking the **scheduled interviews** link.

```
INTERVIEWS
1 · scheduled interviews
```

4. Enter the number of positions for each timeslot. For a single interview, enter 1. For a group interview, enter the number of applicants that can be booked into one timeslot.

5. Click **Add** to add the timeslot to the table below.

6. To **Add bulk timeslots**:
   a) Click **Add**. The **Bulk add timeslots** screen opens.

```
Bulk add timeslots
```

7. Enter From and To dates.
8. Check the boxes for applicable days of the week.
9. Enter Start time and End time.
10. Enter the number of positions for each timeslot. For a single interview, enter 1. For a group interview, enter the number of applicants that can be booked into one timeslot.

11. Click **Invite** to invite internal users to the event.
   a) Invitees can be listed in all timeslots or assigned one.
   b) Invitees will receive a notification on their dashboard and can monitor who has been booked into each timeslot by clicking the **scheduled interviews** link.

12. Click **Add** to add the timeslot to the table.

![Image of the Applicant Tracking System's Training interface](image)

**Note:** Click **Edit** or **Remove** to make changes or delete the timeslot if applicable.

13. Select from the **Remind applicants** drop-down menus to send an automatic email reminding applicants of their scheduled timeslot.
   a) Select the **Yes** radio button if setting a reminder.

14. Select the **Yes** radio button to send an email to internal users invited to the event.

15. Click **Save** to save the Time Slots or click **Save & Exit** to return to the **Manage events** screen.

**Invite Applicants Using Bulk Move**

Once events have been created and scheduled, multiple applicants can be invited to the event by using the **Bulk Move** function.

1. From the **Main Menu**, click **Manage Applications**.
2. Use the Search tab to identify the job posting to be viewed. Enter or select the necessary information and click Search.

3. The Results tab displays the selected criteria.

4. To invite multiple applicants at one time, select applicants using the checkboxes to the left of their names. Complete steps 5-10 for each individual’s timeslot.

5. From the drop-down menu at the top of the screen, select Bulk move. The Bulk move screen opens in a new window.

6. From the Application status drop-down menu, select Phone Screen Scheduling or Interview Scheduling. Guidance information is displayed. Please review and follow guidance as applicable.
7. Choose the radio button **Select an event** for the applicant.
   a) Click on the binoculars to search for the event.
8. Allow the applicant to choose the timeslot.
   a) If selecting a timeslot on behalf of the applicant, choose the radio button to **Select a timeslot**. If the applicant has accepted the timeslot outside of the system, you can choose the **Yes** radio button to **Accept the booking on behalf of the applicant**. The applicant’s application status will then be updated.
9. Email the applicant the event information. Email content may be edited using one of the following:
   a) Review the email template provided and edit/modify as desired.
   b) Choose a different template by selecting the **Communication template option** in the drop-down menu.
   c) You also have the option to add attachments to the email (directions, parking instructions, etc.)
      i. To add an attachment, click on the **Tools** drop-down menu and select **Insert Document**.
10. Click **Move now** to change the status and complete the invite. A confirmation message will display.
11. If additional applicants were chosen in step 4, repeat steps 5 through 10. Repeat until all applicants have been assigned.
The applicant can choose to decline the invitation, withdraw from a timeslot, or change the scheduled timeslot (if other available timeslots remain) up until 48 hours prior to the event.

Once an applicant accepts or declines, their application status will automatically change to accepted by applicant or declined by applicant and you will receive an email notification. A confirmation email will be sent to the applicant once a timeslot is selected.

Manage Events

1. From the Main Menu, click Manage events.

   ![Manage events](image)

   - Events
   - New event
   - Manage events

2. The Manage events screen opens and displays three tabs: Calendar, Events and Timeslots. Columns on the events and timeslots grids can be filtered by selecting the title of each column. This can help group the information if desired.

The Calendar tab displays a calendar with all scheduled events by day.

![Calendar](image)

1. Click the Show Search Criteria link to enter criteria and find a specific event. Click the Hide search criteria link when finished to collapse.
2. Click the event within the calendar to display two options: View bookings and Edit event.

![Calendar screenshot](image_url)

a) Click **View bookings**. The *Manage bookings* screen displays event details, booking information and status of that booking.
   i. Click the **Back to manage events** link to return to the *Manage events* screen.
   OR
   ii. Click the **Print bookings** link to open a print dialogue.

![Manage bookings screenshot](image_url)

3. Click **Edit event** to make any changes to the event. The *Edit event* screen opens. Make changes as necessary. Click **Save and Exit** to return to the *Manage events* screen.
4. At the top of the *Calendar* tab, three links are available to create a New Event, Print events and Print events with bookings. Click the links as applicable.

The *Events* tab displays scheduled events by Event title.
1. From the *Status* drop-down menu, select **Active** or **Archived** events to display. The table automatically updates with the selection.
2. Click the **Show Search Criteria** link to enter criteria and find a specific event. Click the **Hide search criteria** link when finished to collapse.

3. Click the **Edit** link to navigate to the *Edit events* screen. Make changes as necessary. Click **Save and Exit** to return to the *Manage events* screen.

4. Click the **Archive** link to Archive completed events.

5. Click the **New event** link to create a new event.

The *Timeslots* tab displays the events, the timeslots associated with those events and detailed information about each timeslot.

**Note:** For interviews that are required, every attempt must be made to schedule an interview.

1. From the *Status* drop-down menu, select Active or Archived events to display. The table automatically updates with the selection.

2. Click the **Show Search Criteria** link to enter criteria and find a specific event. Click the **Hide search criteria** link when finished to collapse.

3. Click the **Bookings** link to open the *Manage bookings* screen. The *Manage Bookings* screen displays event details, booking information and the status of that booking.

4. Click the **Edit timeslot** link to open the *Edit time slot* screen. Make changes as necessary.

5. Click the **Edit** link to open the *Edit event* screen. Make changes as necessary.

6. Click the **New event** link to create a new event.
REFERENCES
Request Reference Contact Information

If references are not required at the time the application is submitted, you can request reference contact information from applicants later in the process.

To request reference contact information from applicants:

1. Access the applicant list from the Main Menu, by clicking on Manage Applications or through the Job Card, by clicking on View Applications.

   ![Manage Applications](image)

2. Use the Search tab to identify the job posting and/or applicant to be viewed. Enter or select the necessary information and click Search.

   ![Search Result](image)

3. The Results tab displays the selected criteria.

4. Use Bulk move to request references from one or more applicants.

   OR

   Click on the applicant’s Status.

5. The Change application status screen opens in a new window. Select Reference contact information requested.

   ![Change Status](image)

6. Click Next. The Confirm status change screen opens in a new window.

7. Enter the number of references required in the email template; up to six may be entered.

8. Click Move now.

9. References can be viewed through the Applicant Card by clicking on View References.
Manually Entering Reference Contact Information
If references are not provided on the application, you can manually enter the referee information on the applicant’s record.

1. On the Applicant Card, click on the Actions drop-down menu listed next to the application.

   ![Actions drop-down menu](image)

2. Click View references from the drop-down menu.

   ![View references](image)

3. At the top of the screen, click New to manually create a new referee.

   ![New referee](image)

4. Enter in the referee information. Click Save.

   ![Add: Reference](image)

Invite Referees To Conduct Reference Letter/Reference Check
You can request reference letters and letters of recommendation at any point in the hiring process. Reference letters and reference check forms that have been submitted through the system can be compiled with all other application documents using Bulk Compile and Send.
If you do not require references at the time of application, you are responsible for collecting reference contact information within the ATS. References will not automatically be sent after the applicant submits their application. You will need to manually trigger a reference request.

There are two ways that you can trigger reference checks:

**Option 1: Bulk Reference Check.**
You may want to use **Option 1** if they would like to:
- Set the expiry date or deadline by which the reference check must be completed.
- Select the type of reference check form to be sent to the referee.
- Customize the communication that is sent to the referee with department contact information or guidelines for writing the reference letter.
- Attach a custom department questionnaire to the email. The referee can then complete the custom questionnaire and upload against the reference check form.

**Option 2: Change application status to Reference Check Requested.**
You may want to use **Option 2** if no customization is required to the default settings. Default settings are:
- Reference check form is based on the position type. Support Staff positions by default receive the reference check form.
- Expiry date is set to 30 days. You can reinitiate the email request if the expiry date has passed.
- Standard email communication is sent. Point of contact provided is the HR Solutions Center.

**Option 1: Bulk reference check.**
1. Check the box next to all applicants whose referees you would like to contact.

2. Select **Bulk reference check** from the drop-down menu.

3. Select the **Invitation expiry date**. The expiry date determines how long the referee has to complete the reference check. The expiry date is included in the email to the referee. Once expired, the referee will not be able to submit their response. You can reinitiate the email request if it surpassed the expiry date.

4. Select the **Support Staff – Reference Check** form. Referees are asked a series of questions about their employment experience with the applicant.
5. Modify the email to be sent to referee. To add an attachment or custom questionnaire, select **Insert Document** from the Tools drop-down menu.

6. Click **Finish** to send invitation to referees.

**Option 2: Change application status to Reference Check Requested**

1. The application status can be changed individually by clicking on the status or using **Bulk move**.
2. Once the **Change application status** screen opens in a new window, select the **Reference Check Requested** status.
3. Click **Next**.
4. The Confirm status change screen opens in a new window.
5. Click **Move now**.

Once requests are sent, referees will be directed to the Reference Portal, where they will fill out the reference check form or upload a letter of reference.

### Uploading a Confidential Reference Letter

To upload a confidential reference letter for an applicant in the ATS:

1. Click on the applicant name to open the Applicant Card.
2. Click on the Actions drop-down menu next to the appropriate application.
3. Click the **Add document** link.
4. Click on the **Upload file** button to upload the document.
5. Select **Reference Letter** from the drop-down menu.
6. Enter a title.
   **Note:** Be sure to include the name of the referee in the title.
7. Click the **Save and add another** button to upload another reference letter or **Save and Close** to close the window.

### Manage Reference Check Requests

The **Manage Reference Check Requests** screen allows you to view and manage the status of reference checks. You can access this screen via the **Main Menu**.
To manage reference checks for a single applicant at a time, this is best managed from the Applicant Card. Select **View References** from the **Actions** drop-down menu to open the **Manage References** screen for the applicant. From there:

- Send requests to referees
- Resend requests
- View references and answers
- Add references
- Control the reference check account and upload a letter on behalf of referee if required
- Send a reference check from the Applicant Card
OFFERS
Recommend Applicant for Hire

When an applicant is ready for hire, you must change the applicant status to *Hire Recommendation*.

⚠️ Do NOT use Bulk move for this action.

1. From the *Manage Applications* screen, click on the **current status** in the Applicant Grid.

2. The *Change application status* screen opens in a new window. Select *Hire Recommendation*.

3. Click **Next**. The *Confirm status change* screen displays.

4. Scroll down to the bottom of the page and select the **Yes** radio button to update the job status to *Hiring Recommendation*.

5. Click **Move now**.


**Offer Card/Hiring Recommendation**

After you have changed the application status to *Hire Recommendation*, the *Hiring Recommendation* (also referred to as the Offer Card) screen will open in a new window. This screen includes the following sections:
- Personal details
- Job details
- Hiring Recommendation
  - Approval Status
  - Position Details
  - Salary
  - Pre-Employment Checks
  - Onboarding
  - MSU HR Analyst
  - Offer Acceptance Status
- Offer Documents
- Approval process

1. Under the Position Details section, enter the following required information:
   a) Hours per week
   b) Start date – must be a minimum of 14 days from the offer acceptance
   c) Offer type – select Support Staff
   d) Hire action - for clarification on who qualifies for a particular action type, please refer to the HR website at https://www.hr.msu.edu/ua/toolkits/hiring-support-staff.html.
   e) Reason candidate was selected

   ![Position Details Form]

   - To ensure a successful Criminal Background Check (CBC), start date should be no sooner than 14 days from when an offer of employment is accepted.

2. Under the Salary section, enter the Annual (Actual) Salary or Hourly Pay Rate.
Note: If a Salary Justification letter is needed, it needs to be uploaded to the Documents tab of the Job Card. View the Job Card – Documents Tab section for instructions.

3. Under the Onboarding section, enter the following information:
   a) Supervisor
   b) Onboarding Delegate 1 (Optional)
   c) Onboarding Delegate 2 (Optional)

   Note: The Onboarding Delegate 2 will not receive email reminders regarding incomplete onboarding tasks.

   ! Supervisor and Onboarding Delegate selections should be made appropriately, as these users will have access to the new hire task list and are responsible for ensuring the hire and the unit complete all assigned tasks.
   d) Select the appropriate Data Collection Form for Support Staff.
   e) Select the appropriate Onboarding Task List for Support Staff.

   Note: Verify the correct Onboarding Task List is selected as it drives the standard list of tasks the new hire will be required to complete. The Onboarding Task List can be highly customized to meet unit and departmental onboarding needs after the selection is made. View the Onboarding Portal Guide for further information.

4. Under the Offer documents section, you will be required to upload an offer letter to accompany the Hiring Recommendation. Offer letter templates are available and can be modified. You may also upload a customized offer letter. Offer letters for Support Staff are required to have the following information included:
   a) Candidate name
   b) Job/Classification title
   c) Department/Unit
d) Salary/Hourly rate

e) Start date – must be a minimum of 14 days from the acceptance of the offer

f) End date, if applicable.

g) This offer of employment is contingent upon a successful background check (there may be additional department contingencies.)

h) Department/Unit contact information

i) From the Hiring Recommendation screen, under the Offer documents heading, expand/collapse the Offer Letter Templates file folder to view the available templates.

j) Click View to open the template in Microsoft Word.

k) Click Merge document to merge fields from the Offer Card into the offer letter templates.

l) Click OK to save the changes that have been made to the Offer Card.

m) After a short delay, the Document merge screen opens in a new window. Select the template by clicking the checkbox next to the applicable template. Click Merge.
n) The system validates the merge fields and then displays a list of fields that are not pre-populated.

o) Select the **Retry** radio button to retry the merge. If the fields fail to merge on the second try, select ‘Ignore’. The errors will have to be corrected manually by downloading the merged document and modifying as necessary.

p) Once the document has been merged, the offer letter will display under the **Offer documents** heading. Click **View** to open the document in Microsoft Word. Make any necessary changes and save to your computer.

q) Upload the modified offer letter by clicking **Add Document**.

r) Delete the old offer letter template to ensure the applicant only receives the most up-to-date version.
Note: If you do not attach an offer letter to the Hiring Recommendation, you will receive an error message and may not be able to change the application status to move forward in the hiring process.

5. Under the Approval process section, select the appropriate approval process for this offer.
   a) The Originator listed will be the person completing the Hiring Recommendation.
   b) Select the appropriate approval process from the drop-down menu. Once you have made your selection, searchable lookup fields will display for you to enter the names of the approvers and HR Analyst.

Note: The Hiring Recommendation can be routed for up to five levels of approval. View the Offers that Require Department Approval section in the Appendix for approver instructions. The HR Analyst must always be the final approver for Support Staff postings. You can reference who your HR Analyst is on the Hiring Recommendation under the MSU HR Analyst section or at the bottom of the Job Card.

c) To initiate the approval process, click Save at the bottom of the Hiring Recommendation. Note: Approvals are sequential. The approver will be notified via email that they have a Hiring Recommendation to approve. Once an approver approves the Hiring Recommendation it will be automatically routed to the next assigned approver. Once the Hiring Recommendation has been approved by all approvers including the HR Analyst, the Originator will receive an email that it has been approved.
d) A pop-up message will appear notifying you of the approval process you have selected to initiate. Click OK to proceed.

⚠️ If changes need to be made to the Hiring Recommendation, simply cancel the approval process. Make any necessary changes and follow the steps above to resubmit for approvals.

e) The Hiring Recommendation window will remain open. If you want to return to the Manage applications screen, click Save and Close.

Note: You will need to refresh the Manage applications screen in order to see the Hire Recommendation status update.

f) At this stage of the process, the offer is routing through the necessary approvals. Once you have received notice from your HR Analyst regarding the offer, proceed to the HR Approval & Making the Offer section.

**HR Approval & Making the Offer**

The HR Analyst will approve or decline the Hiring Recommendation and the Originator will receive an email from them. If declined, the reason will be included in the email. If approved, the offer can be made to the candidate either verbally or via the ATS.

**Note:**

- It is recommended that a verbal offer be made prior to submitting the formal offer letter to the candidate via the system to better facilitate the negotiation process and eliminate unnecessary handoffs to the candidate.
- It is important to note that any changes to the Hiring Recommendation details and offer letter must be approved by your HR Analyst. View the Modification to Offer Documents section for instructions.

When the formal offer letter is ready to be sent to the candidate via the system:

1. Change the applicant status to *Offer-Submit online offer to candidate* to send an email notification to the HR Analyst.

   a) The HR Analyst will change the application status to *Offer made online*.

   ⚠️ You should not change the application status to *Offer accepted*. The hire must acknowledge their acceptance through their Applicant Portal to initiate their Onboarding Portal.
b) This will trigger an email to you notifying you that the offer has been made online to the applicant.

c) This will also trigger an email to the applicant, directing them to their Applicant Portal where they will see an offer notification. The applicant must open the offer letter and accept or decline. If declining, they will be prompted to provide a reason. Their applicant status will be also be updated automatically to one of the following:

- Offer accepted
- Offer made - declined via system

d) If the applicant declines the offer, the staffing coordinators, Supervisor and HR Analyst listed on the Hiring Recommendation will receive an email. You must update the status to one of the statuses listed below to reflect the appropriate reason. The offer decline reason can be found in the History section of the Applicant Card and will also be emailed to the Primary Staffing Coordinator.

- Offer made - declined due to benefits/compensation
- Offer made – declined due to location
- Offer made – declined due to other job opportunity
- Offer made – declined without reason

e) If the candidate accepts the offer:

- The staffing coordinators, Supervisor and HR Analyst listed on the Hiring Recommendation will receive an email
- Once the offer has been accepted, the candidate will be prompted to fill out the Data Collection Form. These are a series of questions used for processing the hire at MSU HR. The candidate is also provided with a congratulatory message and instructions for accessing their Onboarding Portal.

**Note:** The applicant will not be able to access the Onboarding Portal prior to accepting the offer and submitting the Data Collection Form.

f) Refer the Supervisor and Onboarding Delegates listed on the Hiring Recommendation to the Onboarding Portal Guide for instructions.

**Modification to Offer Documents after Offer Acceptance**

If changes to the Hiring Recommendation (e.g., Start Date, Salary Change, etc.) occur during the negotiation process or after verbal acceptance, the following steps must be taken:

1. Change the applicant’s status to **Hire Recommendation – Changes Made** to trigger the Hiring Recommendation. The **Hiring Recommendation** screen will display in a new window.
2. Reinitiate the approval process to notify the HR Analyst of the changes made by:
   a) Under the **Hiring Recommendation Details** section, clicking **Cancel** on the prior approval process.
b) Entering a message to notify the HR Analyst that changes have been made.

3. Update the appropriate fields.
4. Update the offer letter on your computer to match the updated fields and upload the new offer letter.
5. Delete the old offer letter.

If the applicant has already accepted the offer through the system, follow these additional steps to update the offer letter:

1. Select Merge Document.
2. Select any template and merge.
3. Once merged, documents can be deleted AND the Add Document button will display.
4. Upload any document from the computer.
5. Click Save.
6. Select the appropriate approval process.
7. Resubmit to the HR Analyst (and any additional unit approvers) for approval.

**Monitoring or Managing All Offers**

There are multiple ways to access offer information or to monitor the information once the offer has been submitted:

1. From the Job Card in the Headcount Management section.

![Headcount Management](image)

2. Through the dashboard, via the My New Hires link to view offers for which the user is assigned as the Supervisor, Onboarding Delegate 1 or Onboarding Delegate 2.

![Dashboard with My New Hires](image)

   - The My New Hires screen gives an overview of all hire actions a user has access to.
     - You can filter this grid by columns to group hires (e.g., by status, by posting, candidates in alphabetical order).
     - From this screen, you can access the Applicant Card and the Hiring Recommendation and monitor onboarding tasks.

3. In addition, you can view the Hiring Recommendation from the Applicant Card once submitted by selecting the Hire Recommendation status.

![Applicant Card with Hiring Recommendation](image)
APPENDIX

Shortlisted Applicants (Optional)

The Shortlisted Applications feature allows a user, who has been added to the Job Card as an Additional Viewer, to view a grid of applicants and to learn more about each applicant.

1. From the Main Menu, click Shortlisted Applications.
   OR
   From the dashboard, click the jobs have shortlisted applicants link.

2. The Applicant List screen opens and displays jobs with shortlisted applicants.

3. Click the View shortlisted applicants link. The Applicant List table displays all shortlisted applicants for this job posting.

   Note: The only bulk action available in this view is Bulk PDF. To view all applicant documents in one PDF file, use the Bulk PDF function. See the Additional Viewer Guide for more information.

4. Additional information for each applicant displays:
   a) Application Flags
i. See the Flags tip sheet for more information about flags.

b) Current application status

c) Outcome

d) If the application has been Reviewed

e) Link to View application materials or Applicant Card.

   i. Users with the permission group of Search Committee will see the applicant’s profile, application and resume.

   ii. Users with the permission group of Staffing Coordinator or Dean/VP will see the Applicant Card. See the Applicant Card section for additional information.

f) Click the Status history link to view the status of the applicant throughout the hiring process.

Assigned Applications (Optional)

The Assigned Applications feature allows a user to assign applications to any other user in the system for review. This may be used when seeking feedback about an applicant from another user. Assigned users will be sent an email notification. The user assigned can view the feedback (approved or declined) under the history section of the Applicant Card.

Note: Only one user can be assigned the application at a time. Assigning an application to another user will cancel the previous assignment.

If applicants have been ‘assigned to you for review’, use Assigned Applications to learn more about each applicant.

From the Main Menu, click Assigned Applications.

OR
From the *dashboard*, click the **applicants assigned to you for review** link.

a) The *My Applicants* screen opens and displays all jobs and applicants assigned to you for review.

b) Enter the Job number, Classification title and/or select from the *Status* drop-down menu to filter the list. Click **Search** to update the data in the table below.

c) Click the **View application** link to view each individual application. The Applicant Card opens in a new window. See the [Applicant Card](#) section for additional information.

d) The assigned user will be able to review the application with the option to approve or decline the applicant. Approving or declining the applicant is for informational purposes only; it has no effect on the applicant status or progress in the process.

### Offers that Require Department Approval

If you selected an approval process for an offer that requires the department’s approval, you can advise an approver to follow these steps to review the offer:

1. A notification will appear on the approver’s *dashboard*. Click the **Offers** link. The *Manage Offer Approvals* screen displays.

2. Select the **View** link to open the Hiring Recommendation in a new window.

3. Click **Approve** or **Decline** as necessary.

   a) If **Decline** was chosen, a prompt will display. Enter a reason for declining.
4. The Originator will get an email confirming the action taken.  
   **Note:** The decline reason will be included in the email, as well as in the History notes in the Applicant Card.

### Reporting

Reports are contained in one central location in the ATS, making it easy to access information about multiple postings at once. Your permission group and Job Card role will determine the reports you can view for a particular posting.

The Primary Staffing Coordinator listed on the Job Card can run the following reports for that posting when it is active:

- Applicant List
- Support Staff EEO Summary
- Search Committee Ratings

For further details on using reporting in the ATS, view the Reporting Guide on the HR website at https://hr.msu.edu/aro/documents/reporting-guide.pdf.

There is additional reporting available through the Business Intelligence (BI) system:

1. Login to the EBS Portal.
2. Click on the **Business Intelligence and Analytics** tile under the **Enterprise Business Systems** tab. A new window will display.
3. Click on the **HR-Payroll** folder.
4. Click on the **University HR-Payroll Reports** folder.
5. Click on the **HR Unit Reporting Admin and Manager Self Service Reports** folder.
6. **HR Unit Reporting Administrator Reports** folder.
7. Click on the **Hires and Transfers into a College or Department – HRP1015** report.