Human Resources/Payroll

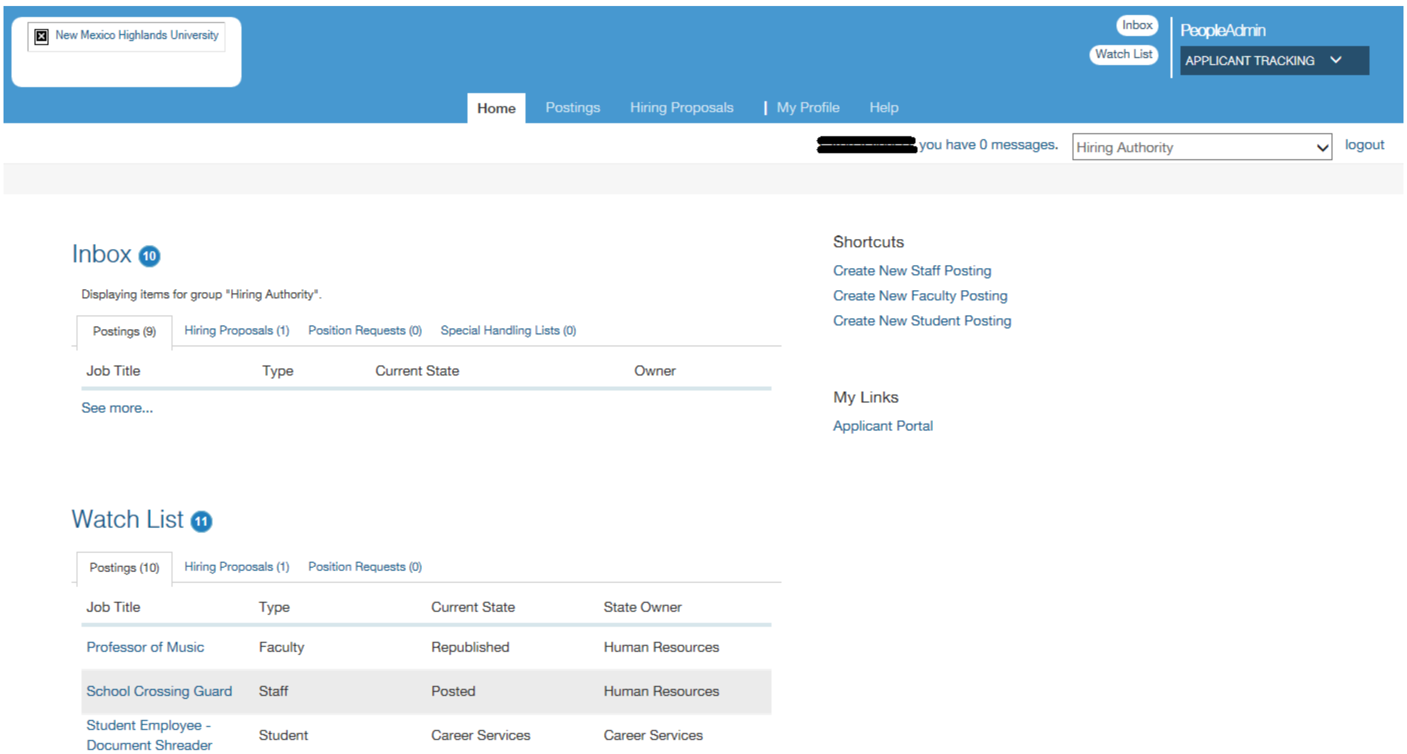
PeopleAdmin Training Guide

Staff Module

Online Recruiting System – PeopleAdmin 7
Staff Employment Initiator Guide – Creating Staff Postings and Hiring Proposals

General Login Process

- ▶ From the NMHU Main website, click on “My NMHU”
- ▶ Select “PeopleAdmin” from the Self Service Banner options
- ▶ Enter Username and Password (same password used in outlook email)



Ensure you are in the Hiring Authority role. If your role is not Hiring Authority, select the correct role from the drop down in the upper right corner of the screen.

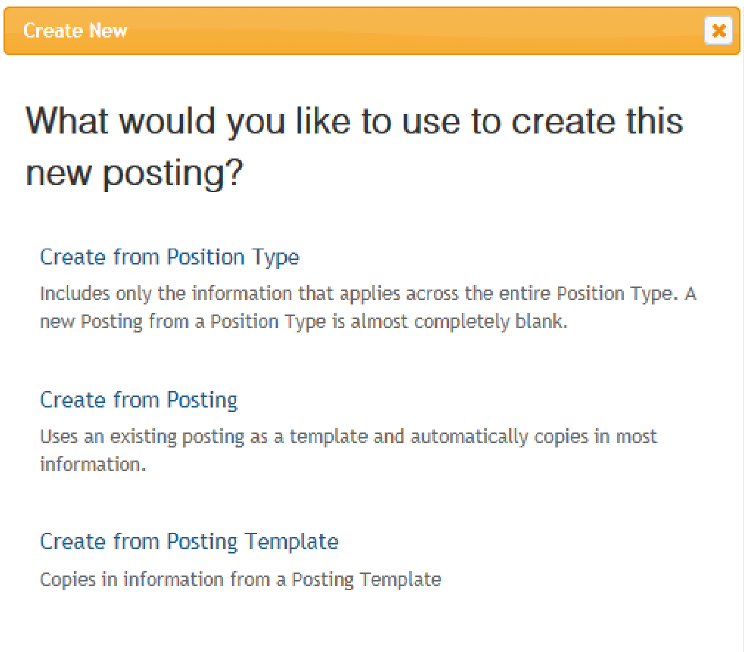
CAUTION Clicking the Logout button by accident will log you out. The system will not give you a warning.

To begin a New Posting:

1. From the Main Menu, choose Posting, select Staff – and select 

OR make your selection from the “Shortcuts” menu on the right side of the screen and select “Create New Staff Posting”.

2. Next, select the type of Staff posting you wish to create. (See descriptions below).



You may create a Job Posting from one of three options ONLY:

Create from Position Type (Option 1): Allows you to create a position from scratch.

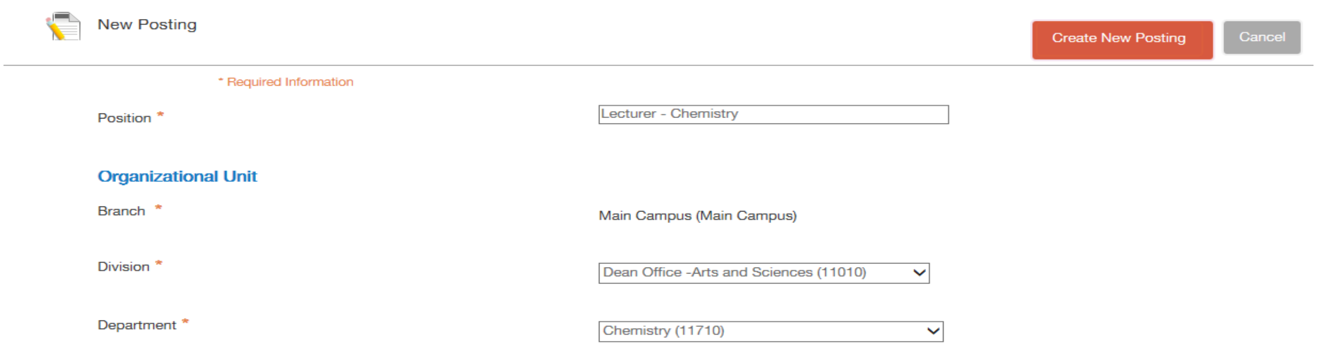
Create from Posting (Option 2): Copies in base classification information. Use this option when creating a unique **STAFF** posting.

Create from Posting Template (Option 3): Allows you to clone (copy) an existing posting and make edits as needed. Use this option when creating a **STAFF** posting for which you have already created a similar posting and need to make only minor edits. Good option when you recruit for similar positions frequently.

Create from Position Type – Option 1

1. You will be directed to the “New Posting” screen.

2. In the “New Posting” screen enter a descriptive and concise “Position Title” for the applicant posting. Drop down fields will allow you to select the Organizational Unit (Main Campus or Centers), Division and Department.



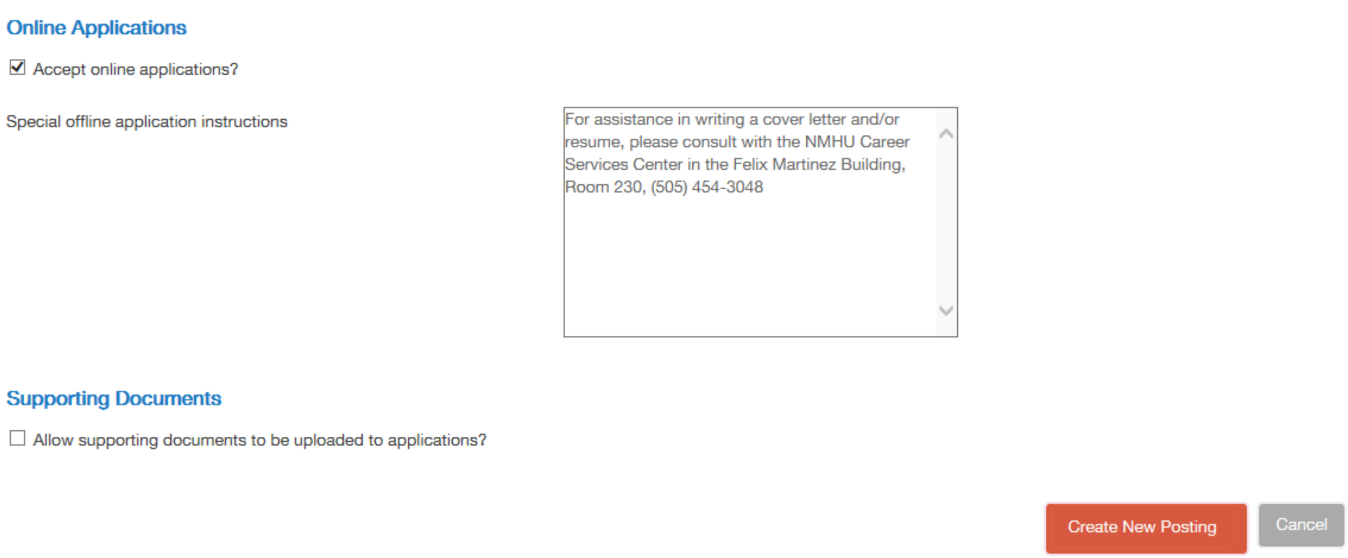
3. "Applicant Workflow" will default to "Under Review by Department/Committee."

4. Drop-down lists in the "references" section will allow you to customize when references requests will be sent out. In addition, once references have all been provided, you can select at which stage to move along the workflow state.

5. "Online Applications" will have a checkmark in the block as the system default. Applicants will be able to access the online jobs portal to search and apply to the posting.

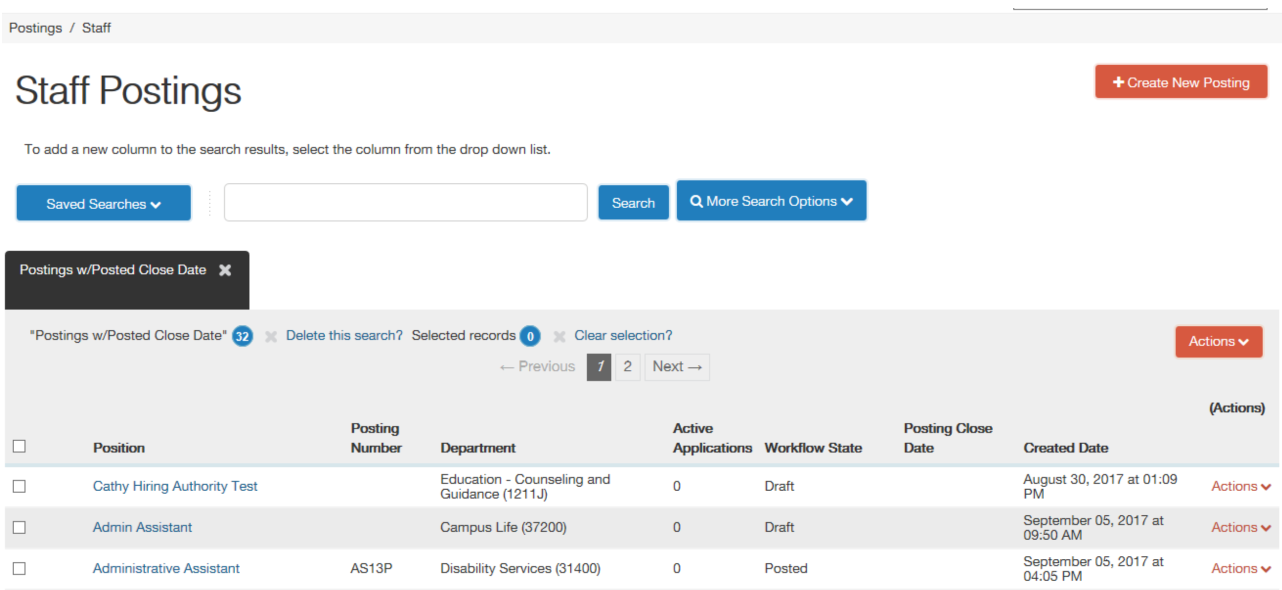
6. Any special instructions regarding the job posting can be entered in the editable field; for example, in the student module, Career Services makes available their services to assist student job seekers with cover letters and/or resumes:

7. Click on "Create New Posting":



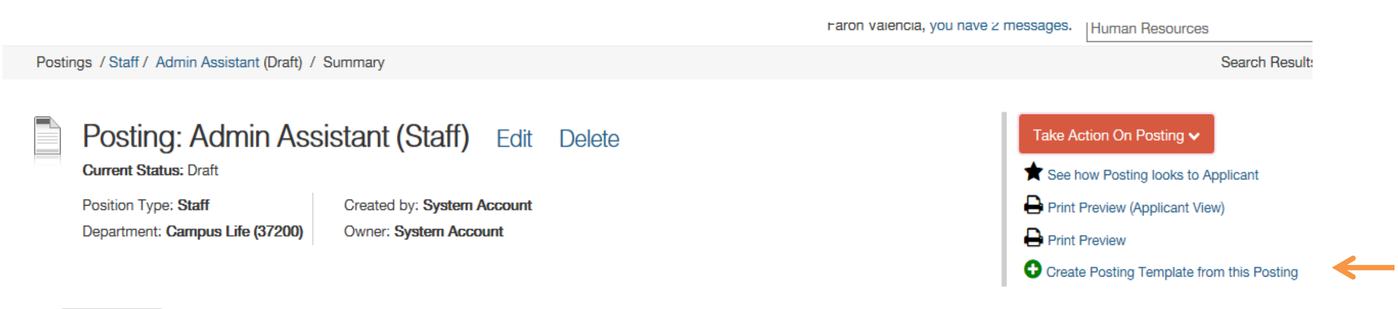
Create from Posting – Option 2

1. The system will default a list of approved Staff postings.



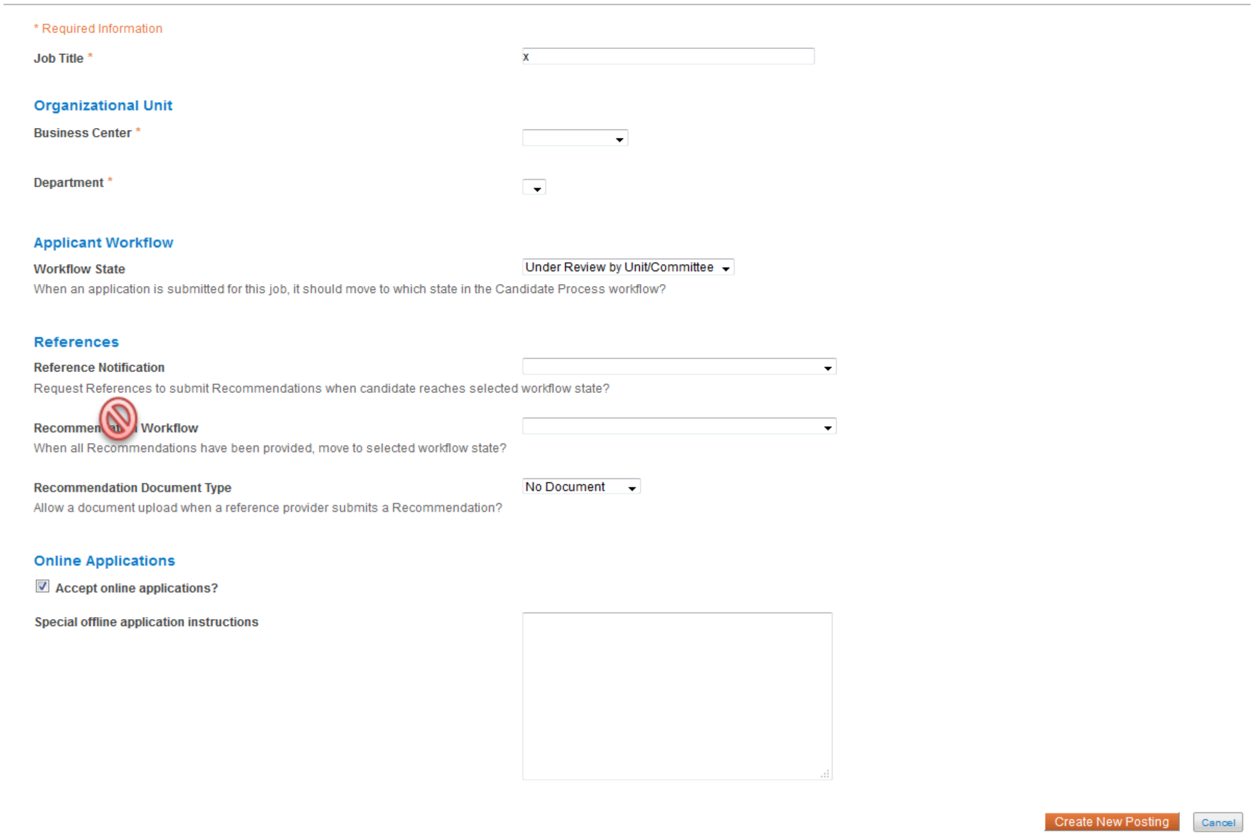
2. To **view** the posting, open it by clicking on the Position Title or by clicking on the Actions link at the right of the Position and selecting View.

3. To Create Posting from the Position Title, choose "Create From" from the Actions link ***or,*** "Create Posting from this Position" after selecting View from the Actions link.



4. A New Posting page will appear for general settings information. Enter an "x" in the Job Title field as you copy the Position Title to this field on the next page. Complete each field as appropriate except for the "References" section as it does not apply to Student positions. Ensure the "Accept online applications?" checkbox is checked.

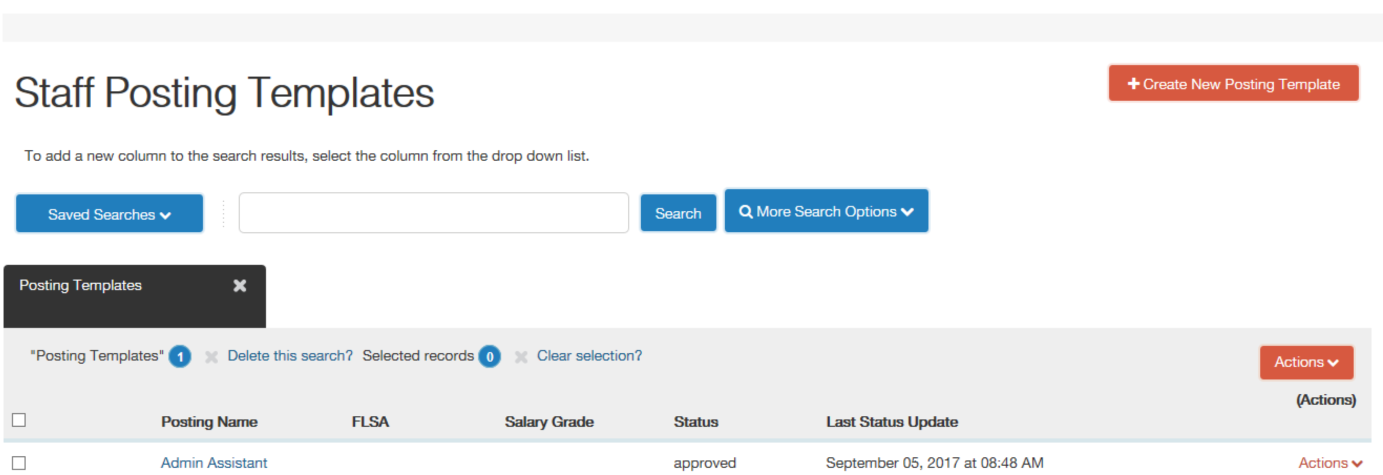
NEW MEXICO HIGHLANDS UNIVERSITY



5. When done, click on **Create New Posting** to continue the posting and move to the next section.

Create from Posting – Option 3

1. Search for previous posting using information given on the Faculty Posting from Templates.



2. Select the posting you wish to clone (copy). You can then view the posting to ensure this is the correct posting to clone.

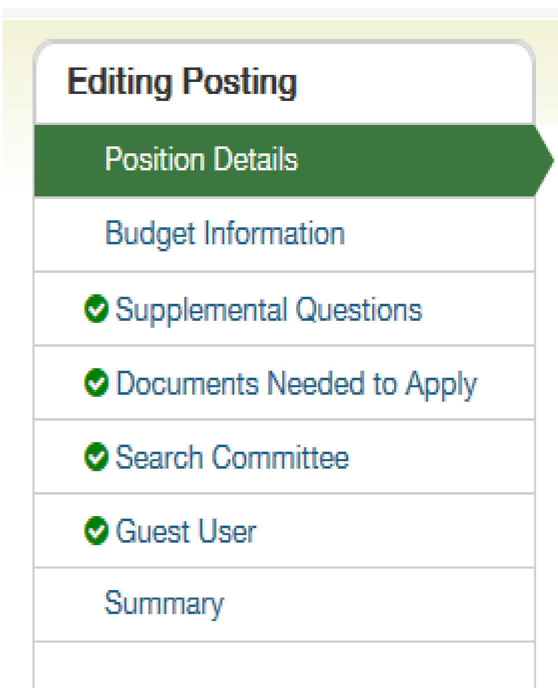
3. Once you select the template, click on "Create Posting from this Posting"

4. A New Posting page will appear for general settings information. The text fields will be pre-populated with the information from the cloned posting.

5. When done, click on Create New Posting to continue the posting and move to the next section.

Create/Update/Complete Posting Details

1. The menu at the top left directs the information you will supply to complete the Posting. You may navigate to each section by selecting the category of information or clicking on the Next button:



Position Details* – You will need to complete all applicable fields in the position details section, including the General Position Information, Position Summary, Position Duties, Qualifications, etc.

Budget Information – New budget summary page is where FOAP record is created.

Supplemental Questions – Add questions that refine the list of qualified applicants. Questions will be reviewed and approved by your HR team.

Documents Needed to Apply – Choose required or optional documents for applicants to attach during the application process.

Search Committee– Search Committee members can be assigned and given accounts to access management of the hiring action.

Guest User– Persons associated with the hiring process can be designated via this feature. They will only be given access to the singular posting.

Summary – Posting details summarized on one screen.

POSITION DETAILS
Replacement or New Position? [required field – name of replacement required if applicable]
POSITION INFORMATION
Position: Auto-Populates to appropriate faculty position title based on classification selected
Full Time/Part Time: Select full time or part time
Job Type: Select from Regular, Tem Appointment, Interim, Temporary or Contract
Hours Per Week: Drop-down menu to select the desired amount of hours the candidate will be authorized to work.
FTE: Select the appropriate choice from list of values
FLSA: Select either Exempt or Non-Exempt
Salary Grade: *Field will be populated in Hiring Proposal*
Target Starting Salary: *Field will be populated in Hiring Proposal*
Position Number: *Field will be populated in Hiring Proposal*
Position Summary: General description of the position and anything else deemed appropriate for the posting.
Duties and Responsibilities: Duties and responsibilities unique to the specific posting.
Minimum Qualifications: Specific requirements for the position (education, experience).
Preferred Qualifications: Add preferred qualifications as appropriate for the position.
Special Conditions for Eligibility: For positions that require any unique criteria for employment consideration. For Instance, bus driver = CDL.
Knowledge, Skills, and Abilities: KSA's that are desired with this job posting.
Physical Demands: Standard physical demands of the job description
Working Environment: Workplace environmental factors that may be encountered with this job posting
Work Location/Campus Center: Drop-down menu provides the option to select location of position.
POSTING DETAIL INFORMATION
Posting Number: Assigned and will auto-populate when forwarded to the Faculty Employment Approver.
Number of Vacancies: Enter the number of positions being recruited for – if a pool you may enter a range.
Desired Start Date: enter date as appropriate
Position End Date (if temporary): enter date as appropriate
Hiring Authority (if other than yourself): Define which Hiring Authority needs access to review candidates.
Open Date: *Date the posting will become active*
Review Start Date: *Date the search committee or hiring authority will begin review of applicants*
Close Date: *Date the posting will end*
Open Until Filled: *If selected, position will remain open until filled*
Special Instructions to Applicant: Available field to communicate any specific instructions to prospective applicants
Quick Link for Internal Postings: Auto-populated link to enable faculty posting to be advertised internally (not available for public on main applicant website portal).
ADVERTISING
Advertising Sources: Select the desired advertisement medium to broadcast the posting
Advertising Text: Enter test desired to run through advertisement sources
Send to HERC: Select Yes or No

HERC Category: Select desired outlets to advertise through HERC medium
ORGANIZATION INFORMATION
Organizational Unit: Default setting from posting creation
NEW BUDGET SUMMARY
Position Number(s): If this is a new position request please type "Request New Position". If the Position number is unknown please type "Unknown" into the field.
Fund: Select the appropriate choice from list of values
Org: Select the appropriate choice from list of values
Account: Select the appropriate choice from list of values
Program: Select the appropriate choice from list of values
Percentage Funded: Enter the appropriate value – new budget summary entry can be created in the event of multiple FOAP's.
Restricted/Unrestricted? Select the appropriate choice from the list of values
SUPPLEMENTAL QUESTIONS (As Applicable) This section is where you will create the Supplemental Questions (SQs) that applicants will respond to when applying to the posting. A question data-bank is provided with an assortment of commonly asked questions. However, you have an option to create your own questions for the posting. These questions can refine the list of qualified applicants and be exported to sort, filter and create reports. Step by step instructions are included within the system. Questions will be reviewed and approved by your HR/PR team.
DOCUMENTS NEEDED TO APPLY (As Applicable) Choose required or optional documents for applicants to attach during the application process.
SEARCH COMMITTEE Assign search committee members and assign new members to search. By clicking on "Create New User Account" the system will automatically generate a Search Committee Username; you may update the password if needed. An email will be sent to the search committee member with username/password for the posting.
SUMMARY Displays details about the posting
HISTORY Displays all transactions associated with the Posting, when it was created, any actions, notes or distributed emails time in status, who prepared the action, time and date stamp. As the number of transactions grows, History may be filtered by clicking on the boxes for Workflow, Notes and Emails. The "Add a new note" option is where you would add any comments you would like noted in the history of the posting or as communication to the Faculty Search Committee. Your name, role, date and time are automatically added to each note.
SETTINGS Display the organizational structure for the job posting and online application information.
HIRING PROPOSALS Displays as job offers are made and prospective new hire information is created.

Other Actions: There are additional actions which may be taken by the user. These include:

Edit your posting to include additional or modified information. You may also navigate to each section of the posting where an Edit link is available by topic

Delete your posting if created in error. This option is only given prior to moving the posting in the workflow

Take Action on Posting (discussed below) to move the posting through the workflow and approval process

See How Posting looks to Applicant to see a preview for how the posting will look in the Applicant Portal

Print Preview (Applicant View) allows you to print the Preview for how the posting will look in the Applicant Portal

Print Preview allows you to print the Preview for how the posting appears on screen

After creating the job posting record the **Hiring Authority** will go the "Take Action on Posting" tab and submit the posting for review to the **Dean/Director**.

Take Action on Posting

- Keep Working on this Posting

WORKFLOW ACTIONS

- Submit for Approval (Move to Dean/Director)

When the **Dean/Director** receives the posting, he/she will then review the hiring proposal and either make edits, send back for corrections, or approve and move the posting forward the Budget Office or the Office of Research and Sponsored Projects for grant funded positions (full and/or partial) or to the Vice President or President (depending on the posting) in the approval process. In this example, the Dean/Director moves the posting to the **Vice President**.

Take Action on Posting

- Keep Working on this Posting

WORKFLOW ACTIONS

- Return for Review (Move to Department Head)
- Submit to Vice President (Move to Vice President)
- Submit to President (Move to President)
- Submit Directly to Budget (Move to Budget)
- Submit (GRANTS ONLY) (Move to Office of Research and Sponsored Projects)

When the **Vice President** picks up the posting, he/she will have the option to edit, return or approve and forward the posting as necessary. In this example, the Vice President elects to move the posting to the **President**.

Take Action on Posting

- Keep Working on this Posting
  WORKFLOW ACTIONS
- Submit to President (Move to President)
- Submit to Budget (Move to Budget)
- Submit to HR (Move to Human Resources)
- Submit (GRANTS ONLY) (Move to Office of Research and Sponsored Projects)
- Return to Dean/Director for Revision (Move to Dean/Director)

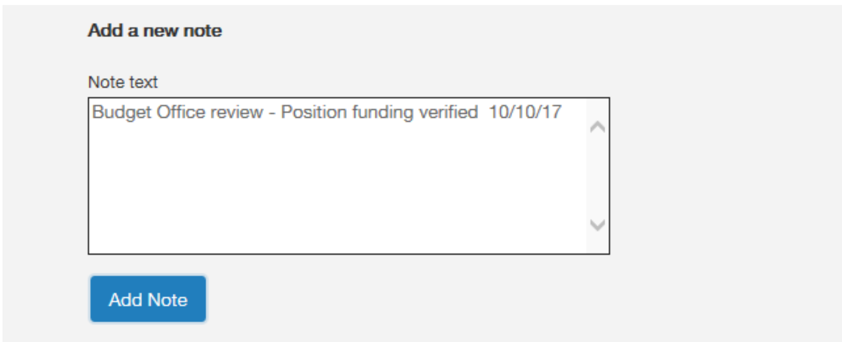
The **President** will now elect to either edit, return or approve and forward the posting to the next level in processing. In this example, the President determines that the posting should be reviewed by the **Office of Research and Sponsored Projects**:

Take Action on Posting

- Keep Working on this Posting
  WORKFLOW ACTIONS
- Submit to President (Move to President)
- Submit to Budget (Move to Budget)
- Submit to HR (Move to Human Resources)
- Submit (GRANTS ONLY) (Move to Office of Research and Sponsored Projects)
- Return to Dean/Director for Revision (Move to Dean/Director)

The **Office of Research and Sponsored Projects** will verify that their portion of the posting and determine if it should return for corrections or move to the next level in processing. The Office of Research and Sponsored Projects determines that it is good and now forwards the posting to **Human Resources/Payroll**.

At any stage in the edit/approval process, notes can be added to the posting. These notes become a part of the posting record and are stored in the history tab.



When **Human Resources/Payroll** (HR/PR) receives the staff posting HR/PR will create a posting template from the posting if one does not already exist. This feature will provide the means to duplicate the posting if it is needed in the future without having to re-invent the process for the position. Once HR/PR determines that the posting has been finalized and that all required endorsements are recorded for the posting HR/PR will take action on the posting. HR/PR has many more options to work with and can reach in at any stage and move the posting if it is deemed necessary for mobilization. In the example below, HR/PR performs final review of the file and elects to **Post the Posting**.

Take Action on Posting

- Keep Working on this Hiring Proposal

WORKFLOW ACTIONS

- Approve for Later Posting (Move to Approved-Pending)
- Post (Move to Posted)
- Cancel (Move to Canceled)
- Post Internally (Move to Approved - Internally)
- Return to Office of Research and Sponsored Projects (Move to Office of Research and Sponsored Projects)

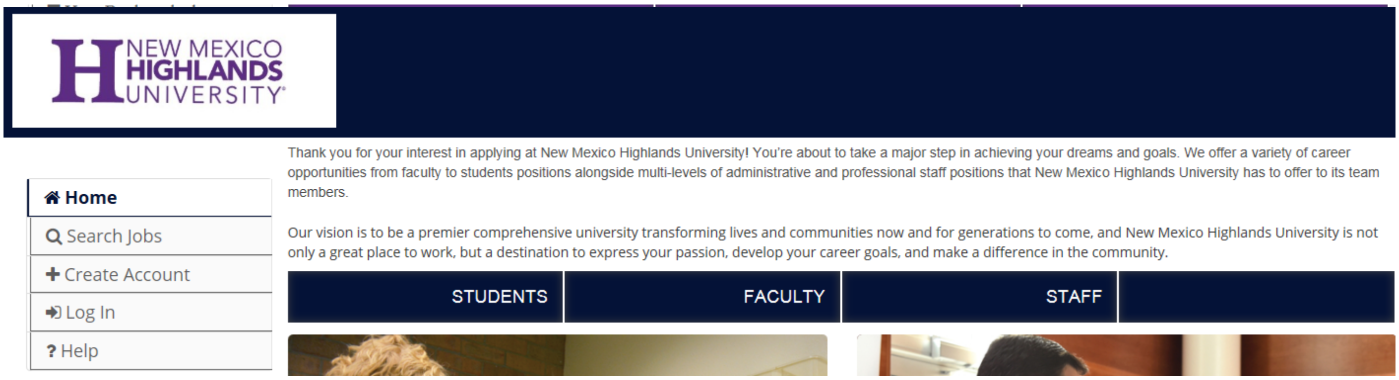
MOVE DIRECTLY TO

- Draft
- Hiring Authority/Initiator
- Department Head
- Dean/Director
- Vice President
- President
- Budget
- Office of Research and Sponsored Projects
- Approved-Pending
- Posted
- Approved – Internal
- Closed
- Filled
- Republished
- Extended Posting
- Canceled

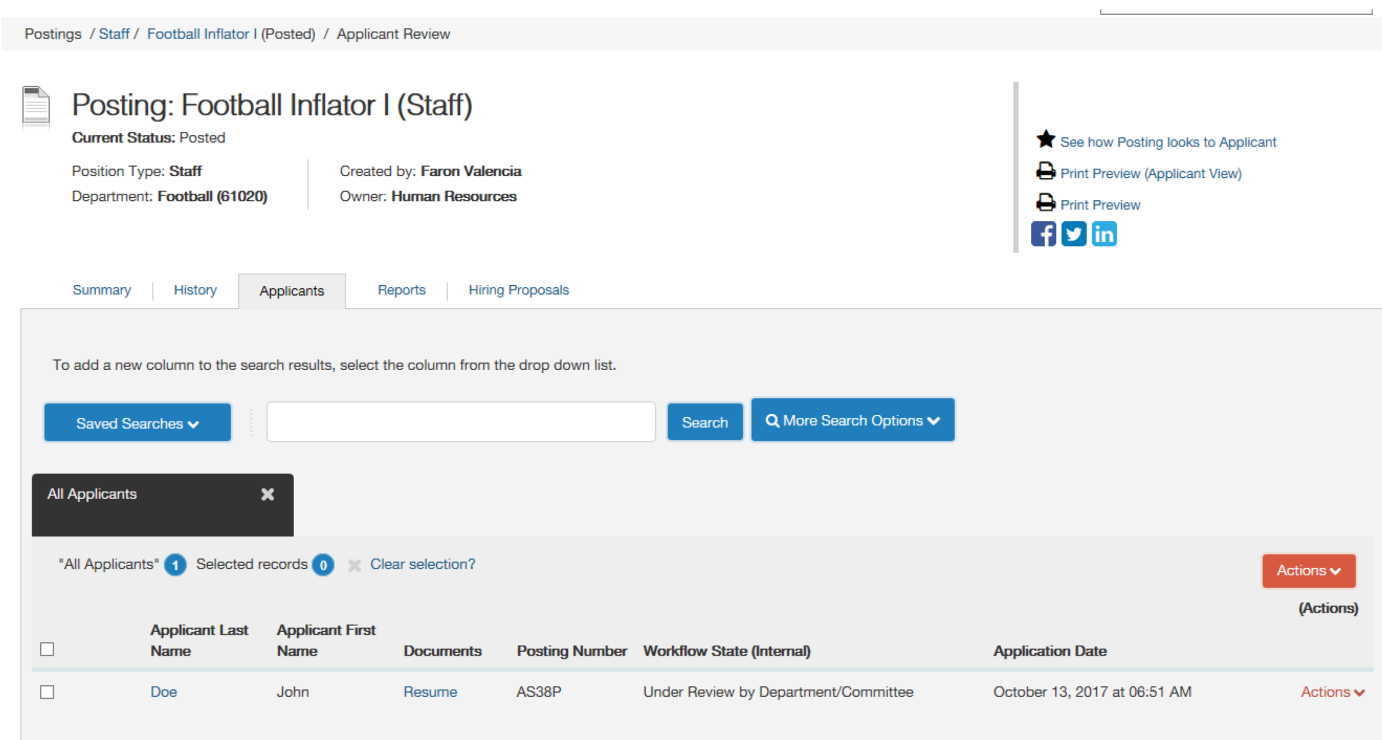
If the posting is to be advertised internally, HR/PR will move to Post Internally. HR/PR can also approve for a later date, post the position, cancel or move the posting directly to a previous office or administrative file.

Once the position is posted, the applicant will then be able to access the online applicant career website to search for and apply for job postings. The hiring authority or search committee will then be able to log in to PeopleAdmin and screen applicants and continue the applicant selection process.

If the position was posted internally, a web link will be provided with the posting to send to a prospective applicant; the posting will not be advertised in the online applicant career website. When they enter the web link it will take them directly to the job posting on the applicant career website for them to apply to the posting. If the posting is public, anyone that visits the website will be able to view and apply for the posting.

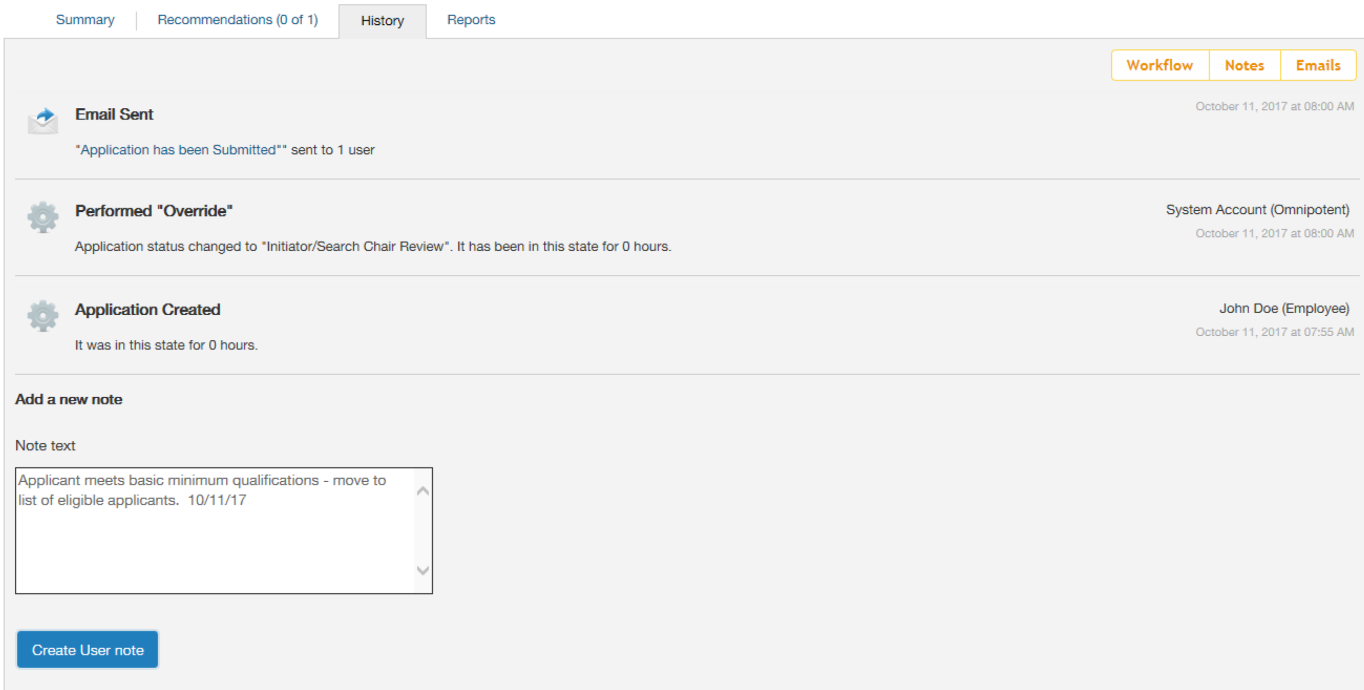


After the applicant applies for the job posting the application is automatically entered on the job posting and can be viewed by the hiring authority, selection committee and anyone in the approval sequence. In the example below, "John Doe" accessed the applicant career website applied for a posted staff position. The Hiring Authority will then access PeopleAdmin, bring up the posting and open the "Applicants" tab.



The Hiring Authority will then pick up the staff application and review the record to determine if the applicant(s) meet(s) the basic qualifications for the posting. If the applicant(s) do not meet the basic criteria for consideration, the Hiring Authority has the option of selecting "Select (Move to Not Interviewed, Not Hired)" on the Take Action on Job Application tab.

While under review, the Hiring Authority can also enter notes that become part of the application that appear in the History tab.



When the Hiring Authority determines to take action on the Job Application several options are presented. The applicant may be disqualified or moved to various steps in the selection process depending on the selection criteria, number of applicants or next step in the selection process. In this scenario, the Hiring Authority determines that the applicant looks good on the application and wants to give it some more time to review the file along with other eligible applicants. The Hiring Authority will then take action on the Job Application and chose "**Select (Move to Further Review).**

Take Action on Job Application

- Keep Working on this Job Application

WORKFLOW ACTIONS

- Select (Move to Not Interviewed, Not Hired)
- Select (Move to Further Review)
- Select (Move to Phone/Virtual Interview)

Once the Hiring Authority evaluates the list of applicants they can then take action on the Job Application. In this scenario, the applicant is chosen for an interview so it is moved to "**Select (Move to Phone/Virtual Interview)**".

Take Action on Job Application

- Keep Working on this Job Application

WORKFLOW ACTIONS

- Select (Move to Phone/Virtual Interview)
- Select (Move to Not Interviewed, Not Hired)

The Applicant is contacted to either interview telephonically or to meet with the Hiring Authority for a face-to-face interview.

Take Action on Job Application

- Keep Working on this Job Application

WORKFLOW ACTIONS

- Select (Move to On-Campus Interview)
- Not Selected (Move to Not Interviewed, Not Hired)
- Not Selected (Move to Interviewed, Not Hired)

Upon conclusion of the interview the Hiring Authority will then select appropriate action for the Job Application. If reference are requested, the Hiring Authority will take action on the job application by selecting "**Request References (Move to Request References)**".

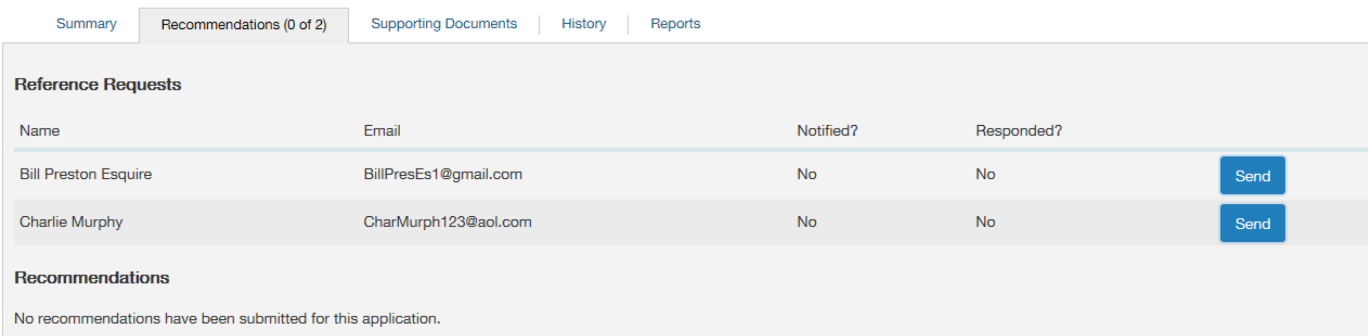
Take Action on Job Application

- Keep Working on this Job Application

WORKFLOW ACTIONS

- Select (Move to Interviewed, Not Hired)
- Request References (move to Request References)
- Recommend for Hire (Not Collecting References (Move to Recommend for Hire)

Upon conclusion of the interview and any other interviews for the job position, the Hiring Authority is presented with several options through PeopleAdmin. The Hiring Authority could request for references by phone or email. PeopleAdmin generates a template from the "**Recommendations**" tab that can be sent to the reference asking them to complete a reference for the applicant.



Summary | Recommendations (0 of 2) | Supporting Documents | History | Reports

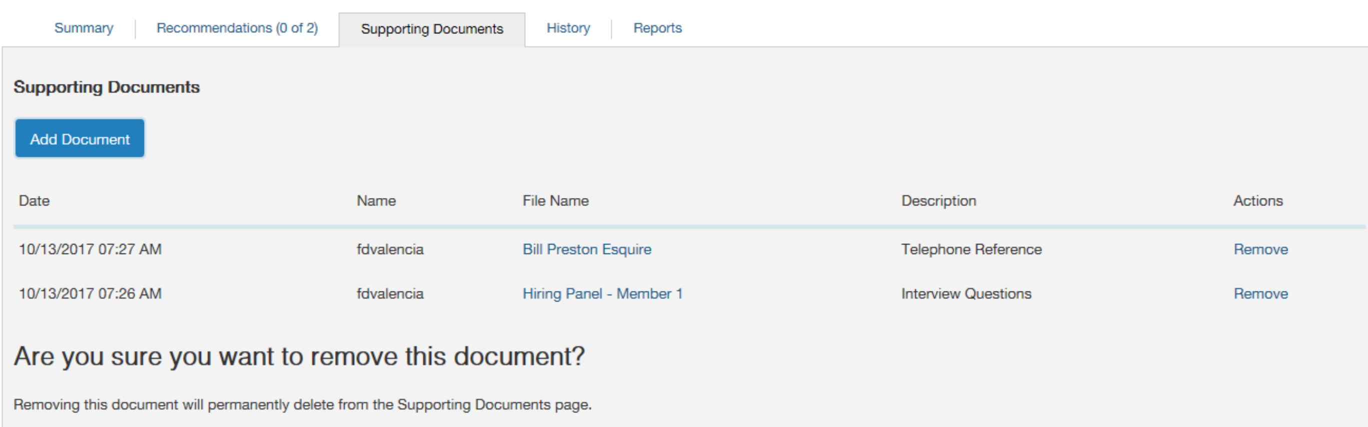
Reference Requests

Name	Email	Notified?	Responded?	
Bill Preston Esquire	BillPresEs1@gmail.com	No	No	Send
Charlie Murphy	CharMurph123@aol.com	No	No	Send

Recommendations

No recommendations have been submitted for this application.

If the reference responds via email, it is captured by PeopleAdmin and entered into the Job Application. For telephonic references, those notes can be scanned into PDF and uploaded into the "**Supporting Documents**" tab. All interview questions and responses can also be entered into the record in this fashion.



Summary | Recommendations (0 of 2) | Supporting Documents | History | Reports

Supporting Documents

Add Document

Date	Name	File Name	Description	Actions
10/13/2017 07:27 AM	fdvalencia	Bill Preston Esquire	Telephone Reference	Remove
10/13/2017 07:26 AM	fdvalencia	Hiring Panel - Member 1	Interview Questions	Remove

Are you sure you want to remove this document?

Removing this document will permanently delete from the Supporting Documents page.

The Hiring Authority will determine if a selection can be made for hire or if the search should continue to solicit more applications. In this scenario, the Hiring Authority determines that the applicant is good and selects the applicant. In PeopleAdmin they would take action on the Job Application and "**Recommend (Move to Recommend for Hire)**".

Take Action on Job Application

- Keep Working on this Job Application

WORKFLOW ACTIONS

- Recommend (Move to Recommend for Hire)
- Interviewed, Not Hired (Move to Interviewed, Not Hired)

Once the Hiring Authority makes a recommendation to hire a new tab "Start ATS Hiring Proposal" appears below to begin the Hiring Proposal action. The Hiring Authority takes action on the Job Application by selecting "**Start ATS Hiring Proposal**."

Take Action on Job Application

- View Posting Applied To
- Preview Application
- Start ATS Hiring Proposal

To Begin a New Hiring Proposal:

Postings / ... / Applicant Review / John Doe (Recommend for Hire) / New Hiring Proposal

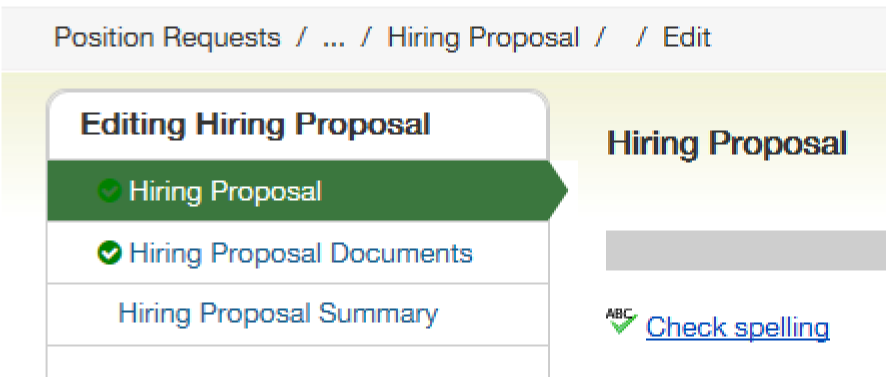
Starting Hiring Proposal

Applicant: John Doe

Posting: Football Inflator I

Start Hiring Proposal or Cancel

The Hiring Proposal through PeopleAdmin replaces the PA-1 (paper) method of hiring new employees. All Offices and Departments involved in the hiring process will need to have access to PeopleAdmin and permissions assigned to execute their duties and roles in moving hiring proposals through the system. Once finalized, HR/PR will process the hiring proposal and verify all endorsements have been recorded and any applicable notes or data edits are complete before completing the record and beginning the employee onboard module.



When a new Hiring Proposal is created, many of the fields are pre-filled from the job posting. The **Hiring Authority** will then ensure completion of the following sections:

- Hiring Proposal Information:
    - Reason for Selection of Candidate
    - Proposed/Offered Starting Salary
    - Proposed Start Date
    - Is Background Check Required? (Yes or No)
    - Please Provide any Background Check Detail (as applicable)

Human Resources/Payroll will provide data entry for the benefits category, employee class category, actual salary/pay, start date, orientation date and probationary period.

The Hiring Authority may enter the Budget Authorization Information if available. However, the Budget Office and HR/PR will ensure completion of this record if needed.

Once the Hiring Proposal is generated the **Hiring Authority** can take action on the proposal and move it to the **Dean/Director** for review and approval.

Take Action on Hiring Proposal

- Keep Working on this Hiring Proposal

WORKFLOW ACTIONS

- Cancel (Move to Canceled)
- Submit (Move to Hiring Authority)
- Submit for Approval (Move to Dean/Director Review)

The **Dean/Director** will then be able to take action on the Hiring Proposal and can review, make edits, return back to the Hiring Authority or approve and forward the Hiring Proposal to the next level in the approval process. In this scenario, the Dean/Director takes action on the Hiring Proposal and selects "**Submit for Approval (Move to Vice President)**."

Take Action on Hiring Proposal

- Keep Working on this Hiring Proposal

WORKFLOW ACTIONS

- Submit for Approval (Move to Vice President)
- Return for Review (Move to Hiring Authority)

The **Vice President** will then be able to take action on the Hiring Proposal and can review, make edits, return back to the Dean/Director or approve and forward the Hiring Proposal to the next level in the approval process. In this scenario, the Vice President takes action on the Hiring Proposal and selects "**Submit for Approval (Move to President)**."

Take Action on Hiring Proposal

- Keep Working on this Hiring Proposal

WORKFLOW ACTIONS

- Return for Review (Move to Dean/Director Review)
- Submit for Approval (Move to President)

The **President** will then be able to take action on the Hiring Proposal and can review, make edits, return back to the Vice President or approve and forward the Hiring Proposal to the next level in the approval process. In this scenario, the President takes action on the Hiring Proposal and selects "**Submit for Approval (Move to Human Resources)**."

Take Action on Hiring Proposal

- Keep Working on this Hiring Proposal

WORKFLOW ACTIONS

- Submit for Approval (Move to Human Resources)
- Return for Review (Move to Vice President)

Human Resources (HR/PR) would have to option to send the proposal to the Budget Office. If sent, HR/PR would take action on the Hiring Proposal and select "**Submit for Review (Move to Budget Office)**."

The Budget Office would review the hiring proposal and verify the FOAP data. When approved, the Budget Office has several options to take action with, depending on what is required. In this example, the Budget Office reviews and verifies the Hiring Proposal and forwards the record back to **Human Resources/Payroll** for final review.

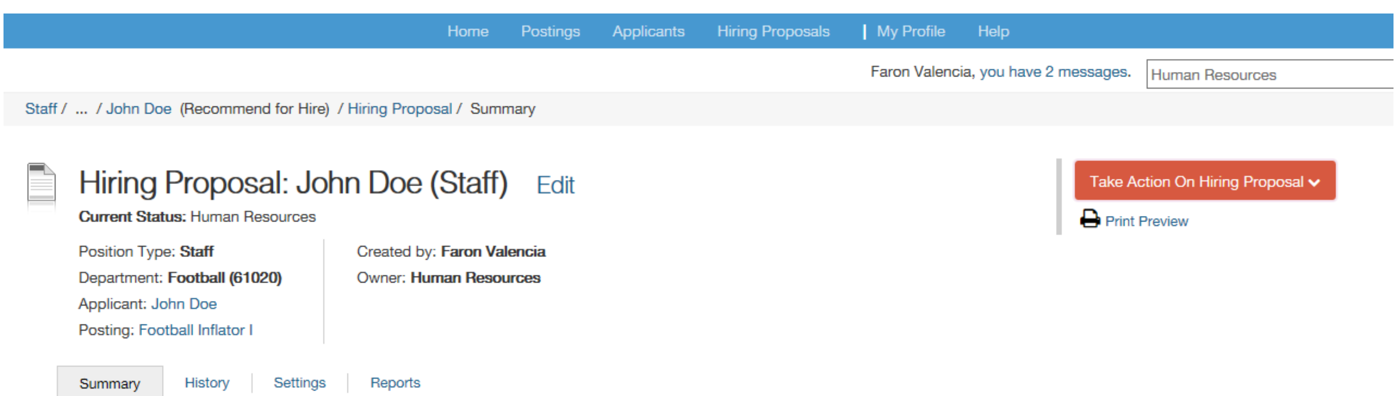
Take Action on Hiring Proposal

- Keep Working on this Hiring Proposal

WORKFLOW ACTIONS

- Approve/Submit (Move to HR Final Review)
- Return for Revision (Move to President)
- Return to Vice President (Move to Vice President)
- Return to Dean (Move to Dean)

In the example below, the proposal was approved and forwarded to **Human Resources**. HR/PR will then verify that all data entry fields are complete and valid before taking action on the proposal.



From here, HR/PR can take a wide variety of action to either send back for more edits, cancel the record, or approve and finalize the hire.

Take Action on Hiring Proposal

- Keep Working on this Hiring Proposal

WORKFLOW ACTIONS

- Cancel (Move to Canceled)
- Approve and Finalize Hire (Move to Hire Approved)
- Return (Move to President)

MOVE DIRECTLY TO

- Draft
- Hiring Authority
- Dean/Director Review
- Vice President
- President
- Hire Approved
- Canceled

Once the proposal is approved and moved to Hire Approved, the "Take Action on Hiring Proposal" tab disappears and the Onboarding event tab appears.

Print Preview

Create Onboarding Event

HR/PR will now create an onboarding event for the new staff employee that will contain a list of tasks and forms for the employee and supervisor to complete. All forms will be electronically signed and loaded in the onboard module as part of the permanent employee file.

IF you should have any questions on creating and processing student postings and hiring proposals please contact HR/PR – we are happy to assist.