Hiring Manager
User Guide
Colorado School of Mines

Mines Current Opportunities website:
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   Error! Bookmark not defined.

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1. Accessing PageUp

PageUp Live URL: https://mines.pageuppeople.com

Login: your multipass/trailhead login
Password: your multipass/trailhead password. PageUp uses singe-sign on (SSO)

⚠️ Instructions to bookmark PageUp website (IE, Chrome, Firefox, and Safari)

Bookmarking the URL: If you bookmark the URL in your browser, you will need to edit the bookmark and make sure it is the URL above otherwise you will get errors when you attempt to login

Open the web browser of choice, login to PageUp, and then use the steps below to bookmark the page.

Internet Explorer
Create bookmark:
- Open IE and go to PageUp URL
- Select Favorites from the menu, select Add to favorites, then select Add

Edit web address:
To change the website address in your favorites select Favorites from the menu, right click on PageUp and select Properties, replace admin and type mines, select OK.

Google Chrome
Create bookmark and edit the web address at the same time:
- Select the Favorites button (the star at the top right of the screen), type the title of the page, Select Edit, highlight admin then type mines, and select Save
Edit Bookmark

Name: PageUp

URL: https://admin.d14.pageuppeople.com/beta/dashboard

Firefox
Create bookmark:
- Select the **Bookmark this page** button (star next to the search window)

Edit bookmark:
- Edit the web address by selecting **Show your bookmarks** (to the right of the star), go to recently bookmark and right click on the PageUp title then select **Properties**
- Select the **Favorites button (the star at the top right of the screen)**, type the title of the page, Select **Edit**, highlight **admin** then type **mines**, and select **Save Load this bookmark to sidebar**

Safari
Create bookmark:
- Select Bookmarks, Add Bookmark or press Command+D
- Select where to store the bookmark from the pop-up menu
- Rename the bookmark or use the name provided by Safari
- Click the Add button to save the bookmark

Edit bookmark:
- Select Bookmark, Edit Bookmark, Bookmark’s menu
- Go to the location of where you saved the bookmark then right click on the bookmark title,
  - Select **Edit Address**, Select **admin** and type **mines**, then press the enter key
2. Getting started in the system

Below is the PageUp homepage menu. The bubbles displayed will vary, depending on the type of access you have. Contact HR (fsearch@mines.edu), Erika Schoonmaker, eschoonmaker@mines.edu, or Deb Wernli, dwernli@mines.edu, if you have questions regarding what you see on the home screen.
Hamburger Menu – another navigation menu.
Same information as the bubble menu, simply a different way to navigate the system.
3. General guidelines for using PageUp

1. Chrome exhibits the most consistent functionality. IE has a few quirks.
2. Turn off pop-up blockers. Instruction below
3. Your session will timeout after 120 minutes of inactivity. SAVE your work.
4. The Back button generally works but may not always be available.
5. The system has a lot of Add, Done, Select, Save, View buttons. If you are not getting the result you want look for one of these buttons.
6. Do not share your login details with any other person.

Turning off Pop Blockers
IE, Chrome, Firefox, and Safari

**Internet Explorer**
1. Select **Tools** from the menu to open the Internet Properties dialog box
2. Select the **Privacy** tab, and then do either of the following:
   - Unselect “Turn on Pop-Up Blocker to turn Pop-up Blocker off
   - **Google Chrome**

3. **Internet Explorer**
   1. Select **Tools** from the menu to open the Internet Properties dialog box
   2. Select the **Privacy** tab, and then do either of the following:
      - Unselect “Turn on Pop-Up Blocker to turn Pop-up Blocker off
   3. **Google Chrome**

   1. Click the Chrome menu on the browser toolbar.
   2. Select **Settings**.
   3. Click **Show advanced settings**.
   4. In the "Privacy" section, click the **Content settings** button.
   5. In the "Pop-ups" section, select "Do not allow any site to show pop-ups." Customize permissions for specific websites by clicking **Manage exceptions**, in hostname pattern type in the PageUp website, https://mines.dc4.pageuppeople.com
   6. Behavior should be set to Allow, then select Done

**Firefox**
1. At the top of the Firefox window, click on the Tools menu then click Options. If you don’t see Tools menu press Alt key on your keyboard then you will see menu bar across the top of the browser select Tools menu
2. Select the Content panel

In the content panel:

- **Block pop-up windows**: Uncheck this to disable the pop-up blocker altogether.
- **Exceptions**: List sites that you want to allow to display pop-ups.
  The dialog has the following choices:
  - **Allow**: Click this to add a website to the exceptions list and then select save changes

**Safari**
1. Open up your Safari Web browser.
2. Go to the Safari menu and choose 'Preferences' from the list of choices
3. Click on the Security heading
4. Check the box marked 'Block pop-up windows' if you would like Safari to block all popups. Safari will then ask if you would really like to change the setting
5. Click on the 'OK' button in order to change the setting
6. Click on the box again, so it does not have a check mark, if you want Safari to allow popup windows.
7. Close the Preferences windows after you are done changing settings.
8. Shut down and restart Safari.
Navigating through PageUp  The following functions are available from the dashboard page:

Filling in fields
Fields in PageUp are filled in by entering data directly on the screen or selecting from drop down or lookup lists. Described here are some common field types and how to fill them in.

Mandatory fields
Mandatory fields are flagged with an asterisk (*). These must be completed when filling in a screen.

Lookup or Binoculars fields
Binocular fields are used to allow users to select from a large set of data e.g. users, cost centers, or departments. To populate binocular fields, click on the binocular icon to view a pop up window which will allow you to search through the data. Select the data you would like to enter by clicking on the appropriate row, then click OK.

Quick search
Quick search allows users to perform a search for an applicant or job at any time.

To quickly find an applicant or job, enter your search criteria into the quick search field and click ENTER. Your search results will be displayed in a pop-up window. If a name is type in this result comes up.
If the search returns no results and the search is a job title, this dialog box will be returned.

Choose the "Looking for jobs that match . . . “ Jobs matching the criteria will be returned at the bottom of a new search pop up.

Recent item history
The recent item history drop down displayed the last 10 applicants and/or jobs viewed by the user. This gives the user the ability to quickly jump directly to a previously viewed item. This is a good way to quickly find jobs and people.

Step 1: Click on the drop down menu to view the last 10 applicants and jobs viewed. Even if you have only just logged into PageUp, the last 10 applicants and jobs viewed in your previous session will be stored in your recent item history:
Step 2: Click on the applicant name or requisition title you wish to view. You will be redirected to the applicant or requisition card. If you have viewed an applicant card in the pop up window, the most recent applicant will appear if the user refreshes the page or navigates away from that applicant card.

Functions at a glance:

Navigating between pages of information
Quite often, too many results will be returned to display on a single page. When this occurs, PageUp provides a number of navigation facilities:

Changing the number of records displayed per page
1. Click the settings button ( ) at the bottom of the list.
2. Select the number of records you would like displayed per page: 20, 50 or 100.
3. Click the Save button. The screen will re-load and the number of records displayed will be changed.

Showing all records
Note: A maximum of 500 records will be displayed using this facility
1. Click the Show all records link at the bottom of the list. If there are more than 500 records in your list, a warning message will be displayed confirming that only the first 500 records will be returned.
2. The screen will re-load will all records displayed. Note: Depending on the amount of information being returned, this may take up to a few minutes to complete.
3. To return to your standard list of information, click the Return to standard list link at the bottom of the list.

Printing a page
Any page within the PageUp system can be printed, excluding pop-up windows.
To print a page:
Select the (i) icon on the upper right corner of the page. A drop down menu will appear with the PRINT option at the bottom of the list.

Tip: To print all records from a list of information, not just the current page, first click the Show all records link at the bottom of the list of information.
5. Creating a Job Requisition (Job Card)

Navigate to **New Job** on your dashboard, from the **Bubble** menu or from right side navigation bar AKA: the hamburger.

You will be directed to the opening page to create a new job for recruitment. This form replaces the Recruiting Action Form (RAF).

**Tip:** Before you can complete the Job Card/Requisition process you need ALL of the following information:
- Position number
- Budgeted Salary
- Expected Salary
- Advertising venues and account
- Search Criteria
- Search Chair and Committee names
You will need to enter the position number. You can either type it in or search for it in the pop-up box on the right as shown above. In this scenario, we will search for one of the position names or position numbers below. Click on the binoculars next to the position number box.

Search by either position number or title. You will be returned to the Select a Job Template page.

Now review the drop down list of job templates and locate the template that is appropriate for the position you are opening. Once you have highlighted the template, select Next. You can ignore the third box labelled “Preview.”

Completing the Job Requisition (Job Card)
You will notice that many of the fields are pre-populated by a data feed that links to the position number you have selected.

When you reach the **Headcount Management**, you are required to enter how many positions you intend to fill under the one requisition.

If this position is **NEW**, enter the number in the blank field to represent the number of open positions.

If the role is a **Replacement** for a vacancy in an existing position, enter the number in the **Replacement field**.

⚠️ Once completed, click the word **Add**. Do nothing with **Position no**.

There are additional fields to be completed as you continue. Remember that all items followed by an asterisk (*) are required fields.

**Selection criteria**

Selection criteria must be identified at Job card completion time

Click **New** to add new criteria to your position.

In the **Search Committee** area, select a Search Chair. Add search committee members. You can edit later if necessary. Also add the department contact.

Utilize the to find people if need be.
Now you are ready to select an **Approval process**! Choose the approval process appropriate for the position in the requisition you are creating.

Some names or departments in the approval chain will automatically populate. Fill in the missing names with the appropriate people for your department.
The last entry on the requisition will ask you to select a status. All new positions should be put into the status of **Pending approval**.

You can save a draft if you are not ready to route for approval. Click **Save** to save the requisition without exiting the page.

Once you hit save the approval begins to route. Make sure your information is complete.

If you missed a required field, you will see an error message at the top. Correct the errors and save again.

A bar confirming the requisition number and time the requisition was saved is displayed at the top of the page. Save this number it is critical through the rest of the process.
Approvals

As a Hiring Manager you may or may not approve jobs. However, you might be the source for training and reminding approvers of the process. There is a short instruction guide and video on the Pageup training resources page for approvers.

**Tip:** As a Hiring Manager you can track pending approvals by looking in Manage jobs in the Hamburger menu.

### Approving a job

Users will receive an email notifying them to review and approve/decline a job. This email will have instructions on how to approve the job: either by replying to the email with the word **approve** or an approver can login and approve. From the **dashboard** menu, approvers will be taken to the job that needs approval.

Information is viewed by scrolling down through the form. Additional information may be viewed clicking through the tabs of the job card to view attached documents and notes. Reviewers should look through the forms as well as the tabs along the top of the form.

Approvers scroll down to the bottom of the job card form to the approve and decline buttons. Approvers will see their name against the approver positions as well as the names of the remaining approvers.
After reviewing all pages, Approvers take one of the following actions:

A. Click Save a draft if you have made changes to the job, but are not ready to approve or decline the job.
B. Click Approve to approve the job.
C. Click Decline to decline the job.
D. Click Cancel if you have not made any changes to the job, and are not ready to approve or decline the job.

If you choose to approve the job, an email will be automatically sent to the next approver. If you are the final approver, an email will be sent to the originator of the job advising that the job has been approved.

NOTE: If an approver declines the job, a screen will be displayed asking for a reason as to why the job has been declined. It will be recorded in the history of the job.

**Declining a job card.**

The decline reason is REQUIRED. Additional comments are not. However, it is very helpful to have more information in the additional comments.

When the approval process is declined the Hiring Manager will receive an email stating that it was declined. Open the requisition and look in the notes section to see the reason for decline. Address the decline reason with the approver and restart the approval process.
Restarting an approval process

Reopen the job card, scroll down to the USERS & APPROVALS section, click Restart. A pop-up confirming that you want to restart will appear. Say Ok.

The scroll down to enter the approval process again. And change the status to Pending Approval. Choose save to begin the process again.

Approval process complete
The hiring manager will receive an email when the approval process is complete.
Managing jobs

Searching for jobs via manage jobs

Click **Jobs** in the upper menu to view and search for jobs in the system (both open and closed jobs). Access to jobs from this area is based on your permission and team settings (e.g. some users can only see their jobs, other’s can see team member jobs, etc.)

![Manage jobs interface with search criteria highlighted]

You can search by quite a few fields you can also sort the jobs by clicking on the different columns.
All about applicants and applications

Searching for applicants

Go to the Manage Jobs link in your left hand hamburger menu. From this list, there are multiple ways to search for applicants.

This page allows you to search for applicants based on a particular job. There are 3 methods available to you.
1. Icon of a person at the end of the row
2. In the Application column, the number of applicants associated with the job

Once a job is selected, you can view the applicants from the upper left hand side of the screen by clicking on:

Viewing an applicant's resume and application form

From the Manage applications page you can view the resume and application form submitted by applicant for a particular job. On the same line as the applicant’s name, on the far right you will see three icons and “View application.”
Managing applications – The applicant card

Viewing an applicant card

The applicant card (shown below) contains information about applicants. This includes their personal details, job application information, previous history and communications, resumes and application forms, etc.

1. Search for them via the Quick Search. Click View to see the applicant card.
2. Search for them via Manage applications in the right side menu. Search by your job and view your applicant. Click View Application to see the applicant card.

Changing application status - Applications section

One of the most important functions you can perform from the applications section of the job card is updating the status of an applicant. Open the applicant card of an applicant you have submitted for a job. Next to the job they have applied to, click on their current status.
Application actions

The Applications actions drop down varies by permission in the system. These are called Application actions because they relate to an applicant’s application for the job as opposed to being about the applicant as a whole. These actions are designed to be simple to use with instructions provided along the way as actions are completed. As you perform actions, this will be recorded in the applicant history section.

NOTE: Many application actions are related to specific modules. I.e. the New Form link allows you to add phone screen forms against an application.

Applicant history section

On the applicant card, there is a section called History where you can view the history of an applicant and filter by item (e.g. documents, communications, and notes).
Managing applicants - Bulk activities

PageUp allows for communication to more than one applicant at a time. This functionality is Bulk action; it can be accessed through the Manage applicants on the right hand hamburger menu.

Many of the bulk activities have communications that go immediately to applicants associated with the action chosen. You have the opportunity to preview the communication before it is sent to the applicant. The action will be stored in the applicant’s history.

List of bulk actions

<table>
<thead>
<tr>
<th>Activity</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bulk apply</td>
<td>Apply multiple applicants to a new job.</td>
</tr>
<tr>
<td>Bulk categorise</td>
<td>Place multiple applicants into a category (categories are used for searching).</td>
</tr>
<tr>
<td>Bulk assign</td>
<td>Assign multiple applicants to a hiring manager for review. The hiring manager must access PageUp People to review the applicants.</td>
</tr>
<tr>
<td>Bulk communicate</td>
<td>Ad hoc communication to multiple applicants. For example, you may need to let multiple applicants know that a job is on hold.</td>
</tr>
<tr>
<td>Bulk compile and send</td>
<td>Create and e-mail a PDF document containing applications.</td>
</tr>
<tr>
<td>Bulk document merge</td>
<td>Create a merged document for multiple applicants.</td>
</tr>
<tr>
<td>Feature</td>
<td>Description</td>
</tr>
<tr>
<td>----------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Bulk export</td>
<td>Create a spreadsheet of all job application data based on applicant responses to questions or test results.</td>
</tr>
<tr>
<td>Bulk invite to apply</td>
<td>Invite multiple applicants to apply for a different job.</td>
</tr>
<tr>
<td>Bulk move</td>
<td>Move multiple applicants into a different application status.</td>
</tr>
<tr>
<td>Bulk move and send</td>
<td>Move multiple applicants into a different application status and to send applications (as e-mail attachments) to another user.</td>
</tr>
<tr>
<td>Bulk Reference Check</td>
<td>Check references in a group</td>
</tr>
<tr>
<td>Bulk Send</td>
<td>Email a bunch of applicants the same template at the same time</td>
</tr>
<tr>
<td>Bulk task/reminder</td>
<td>Select multiple applicants and assign the applicants as a task or reminder.</td>
</tr>
</tbody>
</table>

**Select a communication template**

![Select a communication template image]

- No template
- Contact Unresponsive Applicant
- Contract-PayCheck-Moving-Expenses
- CWID Creation Needs More Info
- CWID Creation Success

**Preview**

Dear [FIRSTNAME],
Thank you for your application for the position of Dean of Graduate Studies with the Colorado School of Mines. We have unsuccessfully attempted to reach you using the contact details you provided in the application process.

We would like to discuss your application further. Please contact me at your earliest convenience.

Thank you for your interest in a career with Colorado School of Mines.

 Regards,

[CONTACT INFORMATION]
Colorado School of Mines
User Guide

Events & Bookings

Create an event

During your recruitment process, users may wish to invite applicants to an event such as an interview. Pageup can help you manage this through Events and Bookings. You will first create an event and then invite applicants to the Bookings. Event, first, then Booking.

⚠️ This functionality works best in Chrome. If you use IE the time slots must be filled in using 24 hour clock or MILITARY time. 13:00 equals 1:00PM.

Step 1. Creating the event. Click on New Event in the right side menu.

Enter the following (see next page for image):

- ⚠️ Title (be sure to include your job number in the event title so that you can find your event)
  - Example: Phone Interview 492301
  - Example: On campus interviews Dean of Graduate Studies 492301
- Event type: Choose one
  - Interview 1
  - Interview 2
  - Phone Screen
- Venue – Choose Telephone for phone interviews or the appropriate location. If you choose Phone Screen as event type the ONLY venue choice will be Telephone.
- Job number (type in your job number or use the binoculars to find)
- Owner (should be completed with your name)
- Contact name (The person an applicant should ask for when arriving ie. search committee chair’s name)
- Public instructions (instructions to the applicant)
Click **Save**. Now you will be able to add timeslots in the next sections.

### Create timeslot

Populate the **event date** field by clicking on the calendar icon and enter start and end times in 9:00 AM or 24 hour time format. Choose AM or PM.

⚠️ **Choose Invite users** to invite the event participants (search committee) to the event. Add attendees in the pop-up window.

In this section position means the number available interview openings at this time slot. Add the number of interview positions and click on **Add** (e.g. you are running an interview session from 9am to 12pm and you have 10 positions available). You can also **Edit** and **Remove** time slots once they have been created.
You can click Yes to remind your applicants before the event. Choose a reminder timeframe.

Click Save. Your event will be housed under Manage Events on the right side hamburger menu.

Add bulk timeslots

This features allows you to add timeslots in bulk (e.g. Interviews scheduled every Monday, Tuesday and Wednesday from 9.00am to 10.00pm for 2 weeks). This is a great feature if you can get your committee to commit upfront to chunks of time. Click on the Add button next to Add bulk timeslots. In the pop up window
that appears, use the ‘From’ and ‘To’ fields to enter a date range in which to run the event. Check the days that you wish to run the event. Enter timeslots that you wish to run (enter timeslots in 9:00 AM or 24-hour time format) and the number of positions that will be available at each timeslot (e.g. for one on one interviews only one applicant position is available). **Review your timeslots carefully.**

Invite Users. This will let users know about the event and all the available time slots. Choose YES to email users and format the email as you wish. Check ‘Yes’ against Active to make the timeslots available. Click on Add. Select Save to update the event.
Bookings - Invite applicants to the event by status change

Invite applicants to the event using Manage Applications on the right side hamburger menu. Choose view application on the far right side of the screen.

Open their applicant card and go to the Applications section of the applicant card, click on their current status and move the applicant to the appropriate status: Telephone or campus interview event booking status.

Choose Select an event by using the binoculars and find the event you created earlier. You can either assign time slots or let the candidate choose depending on the structure of the interview process.

Review the email communication that will be sent.

Click on Move Now. You will be returned to the applicant card.
What an applicant sees:

Applicants will be notified via email that they have been invited to an event. They will log into the applicant portal and accept or decline the invitation.

![Welcome Anne]

Book an individual applicant into a new event

This scenario would be used if an applicant declines an event because none of the days and times work for them. It is also a method that allows you to create new events without needing to navigate to the hamburger.
menu. However, it is **specific to an individual applicant**. Create the new event first. Go to the specific applicant card, go to the Applications section of the applicant card and from the **Actions** dropdown select **New booking to a new event or New booking to an existing event**. Fill in all fields relating to the event and booking details as you did for your first event created (see image below). Choose to accept the booking on behalf of the applicant. Email the applicant. Click on **Save**. You will be returned to the applicant card.

![Event details](image)

**Delete applicant booking**

Click on the **View applicant** link next to an applicant you have booked into an event. Filter **Applicant History Items** by **Bookings** in the dropdown. Click on the **Delete** link next to a booking. Select whether to email the applicant & edit email content if you do so. **Delete**. Click **Done**.

**Events calendar - Viewing calendar**

Click on **Manage events**. The event calendar set to the current day should be displayed. To display events in the system, click on **Show search criteria**. You can create a new event here as well.
Creating an offer

Changing applicant status to begin the offer process

Navigate to the applicant to be made an offer, from the applicant card change the status to Pre-offer salary request. After confirming on the second screen that you wish to advance the applicant to this status, you will be presented with the Offer card.

The top three sections of the offer are prefilled by the requisition. (Personal details, Job details and Offer details)
You will need to make adjustments in the **Position Details** section and complete mandatory fields. Enter data for:

- **Start date**
- **The index/account box if not complete**
- **Requested salary** (e.g. 60,000 – no dollar signs)
- **FTE percentage AND TIME CARD APPROVER** (type something like 80%)
- **Background screen** – check to be Yes
- **Onboarding workflow** – set to New Employee

⚠️ If an adjunct fill in courses to be taught - required for offer letter.

⚠️ Need End Date if a Temp.
Please put in the timecard approvers name with the FTE.

Choose Onboarding flow for **New Employee**. Add the Supervisor and the onboarding contact – someone the employee can go to with questions about the onboarding process.

Continuing down the offer card, it is important to note that the section titled **OFFER PROGRESS** is part of the automated system and should not be completed.
You are now ready to get your offer approved. Scroll down to the Approval process section. You will be asked to select the appropriate approval process. This is very similar to the job requisition approval process.

⚠️ The following is step by step, detailed explanation of the offer process for Admin/Classified.

Once the offer is approved is PageUp:

**Academic affairs creates all offer letters for departments in the Provost’s office.**

Offer: Admin/Classified - Not in Academic Affairs

1. Prepping for the Verbal Offer

   **SPECIAL NOTE:** Completing the offer card and approving it, only makes it ready for a Verbal offer

   **Hiring Manager (Offer Card Originator)**
   - Originates offer card
   - Complete all required fields and some optional fields so that the offer letters will work correctly for the type of hire. See each section below for the fields to complete
   - **Position Details:**
     - Position classification should be completed for you
     - Start date
   - **Accounts & Distributions:**
     - Index 1/Account 1 (e.g. 210219/5219)
     - Percent Distribution for Index 1/Account 1 (e.g. 40 April 1, 2016 to Sep 30, 2016)
     - Additional Indexed and Accounts if necessary
     - Additional Percent Distributions if necessary
   - **Salary & Budget:**
     - FTE (include percent time and the shift pay supervisor or web timecard approver)
   - **Onboarding:**
     - Onboarding workflow: New Employee (choose only this option for now)
     - Supervisor
     - Onboarding contact
   - **Approval Process:**
     - Select Admin/Classified - not in an academic dept
     - The click Save (then click Cancel to exit) or Save and Close.

   **HR**
   - Verify that the correct Approval Process has been chosen
   - Verify the correct onboarding workflow is chosen
   - Verify an end date is chosen for temps, adjunct, visiting scholars and postdocs
   - Complete a salary justification and attach it to the applicant card as a document
   - Look up applicant in Banner to see if they are a current employee (screening may not be required)
• Determine what screenings are required
  • Complete: Pre-Employment Checks
    o Background screen
    o Physical demands
    o Drug screen
    o Motor vehicle record check
    o Credit history check
    o Credentials verification
  • Then click the Approve or Decline button

**Director**
• Read the salary justification that HR has attached to the applicant; do this by searching for the applicant in the Quick Search and looking at the attached documents on the applicant card
• Completes or verifies requested salary information fields in the following section:
  • Salary & Budget:
    - FTE (include percent time and the shift pay supervisor or web timecard approver)
    - Requested Salary: complete with desired salary (e.g. $97,500)
    - Requested Salary Justification: enter a justification for the salary request.
  • Then clicks the Approve button

**Vice-President**
• Reads the salary justification that HR has attached to the applicant; do this by searching for the applicant in the Quick Search and looking at the attached documents on the applicant card
• Completes or verifies final salary information fields in the following section:
  • Salary & Budget: (ADMIN HIRES)
    - Final Approved Salary: complete with dollar amount that will be offered to the applicant (e.g. $95,000 to $105,000)
    - Salary Recommendation & Notes: enter a salary range so the person making the verbal offer has some wiggle room without having to re-start an offer card (e.g. Kevin Moore: Acceptable offer range is $95,000 to $105,000)
  • Salary & Budget: (PART-TIME HIRES)
    - Final Hourly Pay Rate: complete with dollar amount that will be offered to the applicant per hour (e.g. 23.50) - no dollar sign
    - Salary Recommendation & Notes: enter a salary range so the person making the verbal offer has some wiggle room without having to re-start an offer card (e.g. Kevin Moore: Acceptable offer range is $95,000 to $105,000)
  • Then clicks the Approve button

**Budget**
• Looks at and verifies information in the following sections:
  • Accounts & Distributions:
    - Index 1/Account 1 (e.g. 210219/5219)
    - Percent Distribution for Index 1/Account 1 (e.g. 40 April 1, 2016 to Sep 30, 2016)
    - Additional Indexed and Accounts if necessary
    - Additional Percent Distributions if necessary
  • Salary & Budget:
    - FTE (include percent time and the shift pay supervisor or web timecard approver)
    - Final Approved Salary
    - May make changes to these values
    - Add notes to Salary Recommendation Notes field
    - Then clicks the Approve or Decline

**Applicant**
• Does not receive anything nor sends anything at this time
• Does not receive any email from the PageUp system.

2. **Making the Verbal Offer**

**Hiring Manager (Offer Card Originator)**
• Receives the email that indicates when the offer has been approved
Then informs the **Director** or whoever is going to make the verbal that they may do so

**Director (authorized to make verbal offer)**
- Makes the verbal offer at the specified amount in the Final Approved Salary field but is authorized to offer anything within the range listed in the Salary Recommendation Notes field.
- If the verbal offer is accepted, inform the **Hiring Manager** so they can complete the 'paper' offer.
- If the verbal offer is not accepted because it is greater than the authorized salary range, go to **Step 4**.
- If the verbal offer is turned down, go to **Step 5**.

**Applicant**
- Receives a verbal offer and either accepts or has additional conditions that may need to be negotiated.
- Does not receive any email from the PageUp system.

### 3. Verbal Offer Accepted

**SPECIAL NOTE:** The offer only goes to the applicant once the applicant's status has been changed to Formal Offer Made. Be sure the merged offer letter is attached before changing the applicant's status to Formal Offer Made.

**Hiring Manager (Offer Card Originator)**
- When an offer has been accepted, you will receive a detailed email that lists a lot of the steps listed here but with information on what buttons to click to make things happen.
- Be sure the Final Approved Salary field or the Final Hourly Pay Rate field is completed correctly (this is what the merge document uses).
- For Admin Faculty, Hiring manager generate the offer letter by using the merge document functionality.
- For Classified positions HR creates the offer letter.
- View the merge document before sending.
- Then change the applicant status to Formal Offer Made. This will cause the offer letter to go to the applicant.
- The applicant should start working on the background check requested in the offer letter.
- You will receive an email when the applicant has completed their background check.
- If the background check is successful continue with the next steps. If the background check is not successful, you will receive an email (and the applicant) that the offer has been revoked. Communicate this with the **Director** and decide if an offer should be made to a new applicant. Then go back to Step 1.
- The applicant will then be automatically asked to complete a New Employee Form with information like: emergency contacts, banking and social security info.
- You will receive an email when the applicant has completed the New Employee Form.
- HR will use the New Employee Form and the applicant's offer card in lieu of a completed HRS form.
- You will not receive an email from HR when the CWID is created. We hope to create an Cognos report to inform when new hires have a CWID.

**Director & Vice-President**
- If an applicant does not pass the background check, decide if an offer should be made to a new applicant.

**HR**
- Creates offer letter for Classified positions.
- Is emailed a report of applicants who have accepted their offer and do not need any screenings. Move these applicants from the application status of Offer Accepted to the applicant status of Screenings Not Required.
- If screenings are required. Keep applicants in the Offer Accepted status until you receive an email from InfoCubic indicating success or failure on the background check.
- Receives an email from InfoCubic indicating success or failure on the background check.
- If the background check is successful, change the applicant status to Screenings Complete.
- If the background check is not successful, change the applicant status to Offer Revoked.
• For successful background checks, use the report for Janice that indicated who completed the New Employee form.
• Use the New Employee Form and offer card as the HRS form for the new hire.
• Enter the new hire in Banner and create a CWID.
• HR closes the job

**Applicant**
• Receives an email saying there is an offer waiting for them.
• Receives the offer letter.
• They must accept the offer electronically.
• Starts their background check.
• When background check is complete, receives an email saying they are in onboarding and have other forms to complete.
• Receives an email when the New Employee Form is complete and told new department will contact them about onboarding.

4. **Verbal Offer Not Accepted**

**SPECIAL NOTE:** HR must be contacted to cancel an approved process so that a new approval process may be started.

**Hiring Manager (Offer Card Originator)**
• Receive an indication from the Director that the verbal offer was not accepted
• Contact HR at fsearch@mines.edu to request a job offer cancellation on applicant LASTNAME for Job No. xxxx
• Wait to hear from HR that the offer approval process has been cancelled
• Work with your Director to update to a new salary in the Final Approved Salary field and a new salary range in the Salary Recommendation Notes field
• Then edit the offer card of the applicant to choose an Approval Process. This will kicks off the approval process again.
• Let the approval process run its course again
• Go back to **Step 2 Making a Verbal Offer**

**HR**
• Receives email from Hiring Manager that an Approval Process needs to be cancelled.
• HR cancels the process for the applicant in question
• HR emails the Hiring Manager indicating that the Approval Process has been cancelled for the applicant

**Director (authorized to make verbal offer)**
• Send an email or inform the Hiring Manager because they will need to start a new approval process when a new salary range has been negotiated
• Work with the area Vice-President (if necessary) and Budget/ORA to determine a new salary and salary range.
• Work with the Hiring Manager to edit the offer card of the applicant to update to a new salary value in the Final Approved Salary field and a new salary range in the Salary Recommendation Notes field

**Vice-President**
• Work with Dept Head to determine new salary and salary range

5. **Verbal Offer Not Accepted and not able to reach a salary agreement**

**Hiring Manager**
1. Receive an indication from the Dept Head that the applicant has turned down the job offer.
2. Change the applicant's status to Withdrawn
3. **If the Dept Head** indicates that an offer will be made to a new applicant, then go to **Step 1**.
4. **If the Dept Head** indicates that no other applicants will be made an offer, change the job status to Failed.
Dept Head (authorized to make verbal offer)
1. Send an email or inform the Hiring Manager that the offer is not accepted and the applicant has turned down the final job offer.
2. Work with Dean to decide if new offer to a new applicant should be made.
3. If yes on a new applicant, go to Step 1.

Vice-President
1. If necessary, work with Dept Head to determine if a new applicant should be made an offer

Applicant
1. Applicant turns down final job offer by informing the person making the verbal offer.
2. When the applicant is moved to the withdrawn status, they will not receive an email.

HR
• Closes the job

After the verbal offer has been accepted, you can create the offer letter for Admin Faculty.

You will need the following information from the offer card:
- For admin job: screenings required. This will determine the letter you choose
- For Classified: Full time or Part time AND exempt or non-exempt.

Click on the Merge document button. You will be prompted again to save the offer card. Do so. On the next screen (see image below), click on the green plus sign next to the word Offer Letters. This will display the offer letters. Put a check mark in the box appropriate to the job position of your group (either academic or administrative).

Click Merge. If you get a dialog box about APPLICANTSTREET2 not being complete. Choose ignore.
Once the letter is complete move the candidate to the new status of **Formal Offer Made**. The letter will then be emailed to the candidate via the applicant portal.

What the applicant sees:
After the applicant accepts the offer

Several status changes happen after the applicant accepts the offer:

- Immediately change status to Offer accepted
- Employee has access to the new employee portal.
- HR monitors background screening progress
- HR changes status to Background screening complete which trigger new employee form, collects basic information need to enter the individual into Banner to create the CWID.

![Image](image-url)
What Applicants see:

- Applying
- Emails
- Bookings

Instructions: Follow the step by step instructions for each scenario. If the scenario fails in any of the areas questioned, send an email to ginger@mines.edu with the scenario number, your username and the nature of the failure.

Applying for a job as an applicant

In a new browser, go to the Mines Current Opportunities website (details are at the start of this document). Find the job that you created and was sourced by your facilitator in Scenario 2 by searching for the job number or title (it may take up to 15 minutes for sourced jobs to appear on the website). Open the job by clicking on the job title and click the Apply button. Agree to the privacy statement, and enter your email address. You will have the opportunity to upload a resume right away. Skip this and click Continue. Fill in all mandatory questions and submit your application (be sure to note down your password). This section is set up for applicants, so your single sign on for Colorado School of Mines will not work here. You will need to create your own unique password.