Western Michigan University
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ADMINISTRATOR'S GUIDE
For Faculty Postings

Western Michigan University's
Online Applicant Tracking System

Created 02/28/2022

Revised 12/01/2022

INTRODUCTION

Welcome to the Western Michigan University's Online Applicant Tracking System (OATS). This recruitment system was established to maintain our online applicant tracking system for processing job postings and accepting applications for employment. PeopleAdmin is our vendor for our online applicant tracking recruitment system.

This system will be used to:

- Create and submit position posting
- View applicants from your posting and select finalists
- Create hiring proposals and initiate background screening process
- Close communicate loop with remaining applicants within the posting

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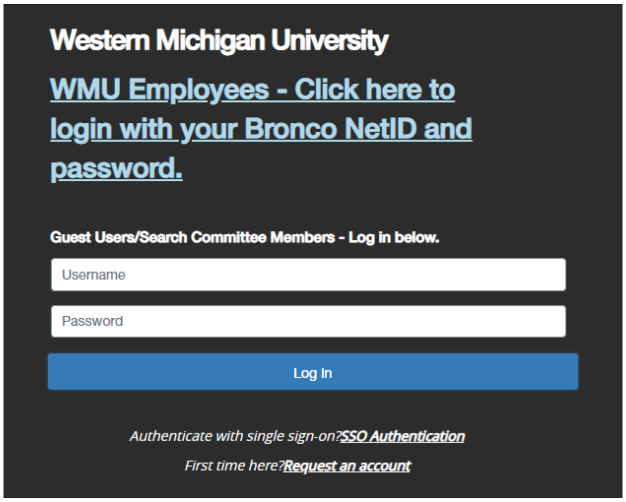
Create Job Posting (Human Resources):

Access the PeopleAdmin site by going to: https:// www.wmujobs.org/hr.

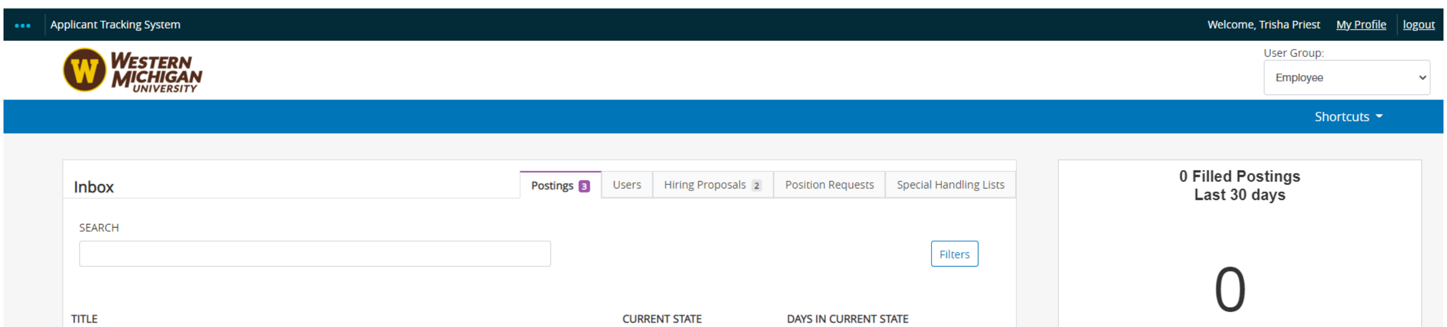
(Sample screenshot of the page below)



As a WMU employee, please click the light BLUE hyperlink box ABOVE the Guest User area, which will redirect you to a WMU page to enter your Bronco NetID and password.

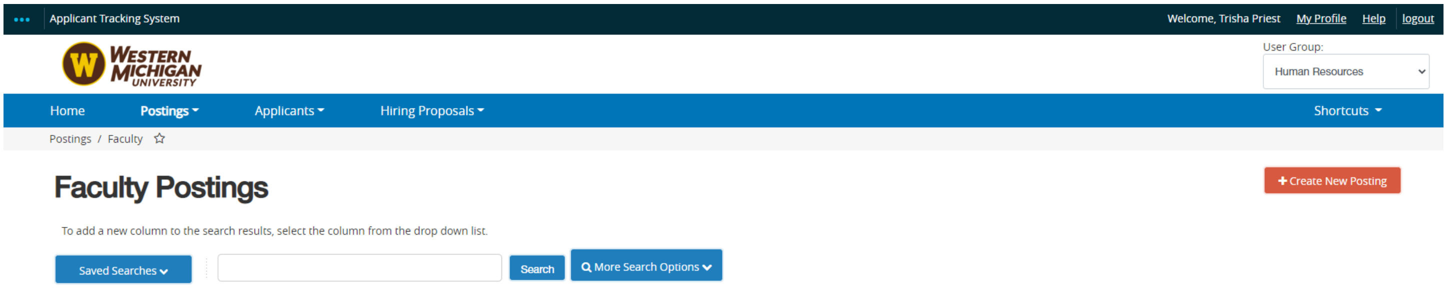
You will now be logged on to our Online Applicant Tracking System.

(Sample screenshot)



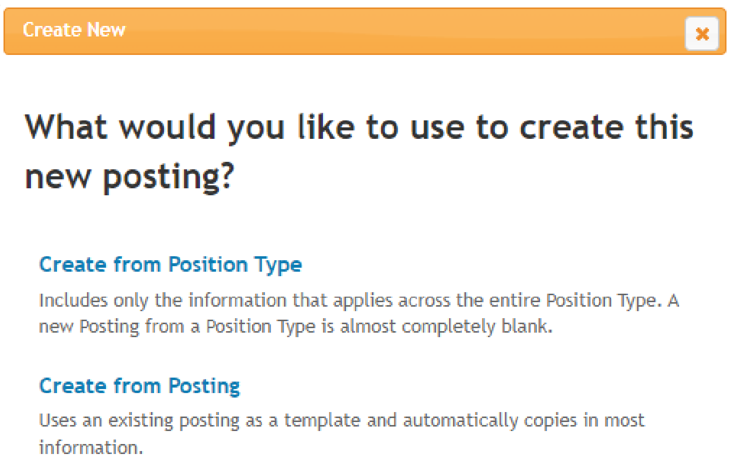
To create of new job posting:

1. Ensure your user group in the upper right-hand corner of the screen is set to "Human Resources" for faculty postings. If it is not set, click the drop-down arrow to change appropriately.
2. In the blue bar on the top of the page, Postings/Faculty.
3. Once in site, click Orange +Create New Posting button on top right side of screen. **(Sample screenshot of the page below)**



You will need to decide how you would like to **create your new posting**. You will pick from the following:

- Create from Posting Type - new position never posted before
- Create from Posting – creating posting using a previously posted position



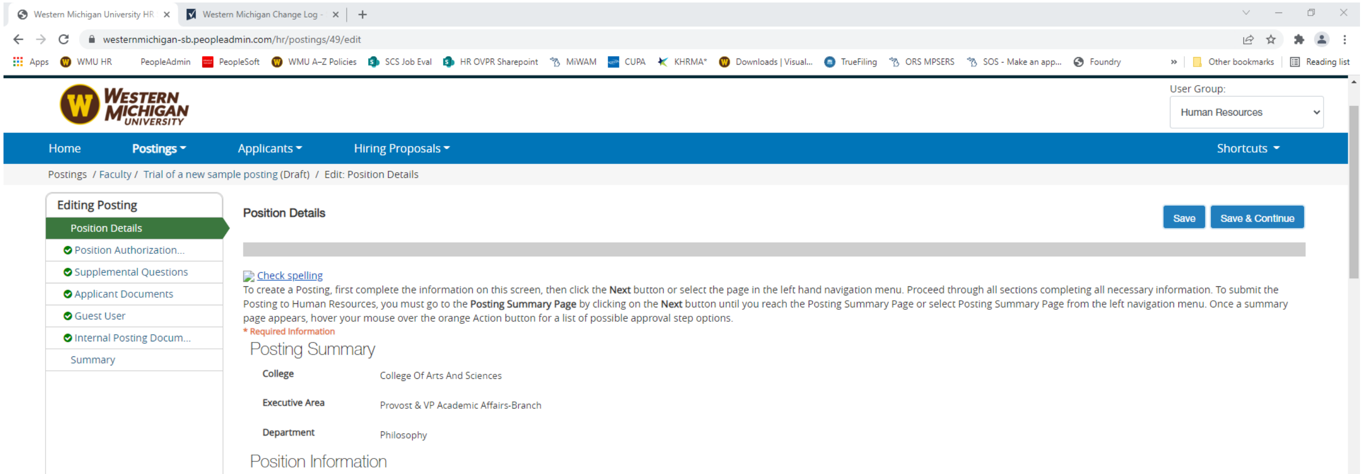
If you select "**Create from Position Type**" you will now type in Job Title and complete the Organizational Unit section. Ensure the box is checked to "accept online applications". Additionally, ensure "allow supporting documents to be uploaded to applications" is checked. Click orange "**Create New Posting**" box.

If you are pulling from a position already posted select "**Create Posting from Posting**", you will be prompted to identify a previous posting to use. You may enter the position title, or previous posting number, in the search box to easily navigate to a prior posting. If a position is identified for use, click the red "action" listed in the position row, then chose "**Create Form**". A new posting screen will appear with the posting information pre-populated. Review information and make necessary changes. When complete, click "**Create New Posting**".

<u>Position Details:</u>

To create a Posting, first complete the information on the screen, then click the "**Create New Posting"** button or select the page in the left-hand navigation menu. Proceed through all sections completing all necessary information. To finalize the posting, you must click on the "**Save & Continue"** button until you reach the Summary page or select "**Summary"** from the left navigation menu. Once a summary page appears, hover your mouse over the orange Action button for a list of possible approval step options. The posting must go through the proper approval chain depending on department until it is returned to Human Resources. Human Resources will review/approve the final draft posting and will post the position on the website.

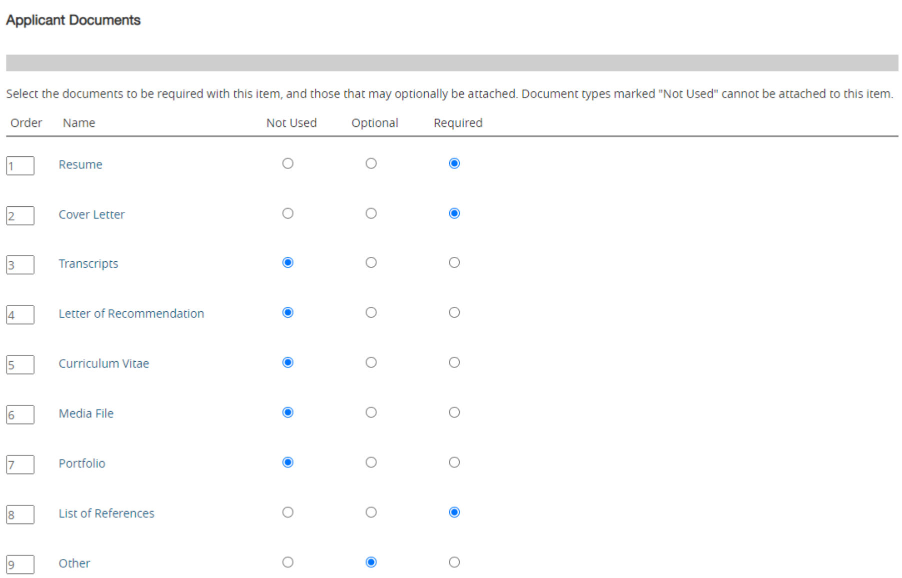
(Sample screenshot below)



Fill in all the position information. This can be saved at any time as a draft to work on later. As long as it is in draft mode you will be able to make changes. The General Summary, Major Duties and Minimum Qualifications fields are not required fields for HR to complete, the are required fields for the Chair/Director.

Applicant Documents:

Applicant documents can be included in the application process by selecting either optional or required. If required is selected the applicant will not be able to complete the application process unless the document(s) are included. Most commonly, the required documents are: Cover Letter, Curriculum Vitae (CVs), Portfolio, List of References. Any of the documents not selected as required could be listed as optional.**(Sample screenshot below)**



Guest User:

If you need a Guest User you can create an account. This account would be used for anyone off campus or others on the Search Committee.

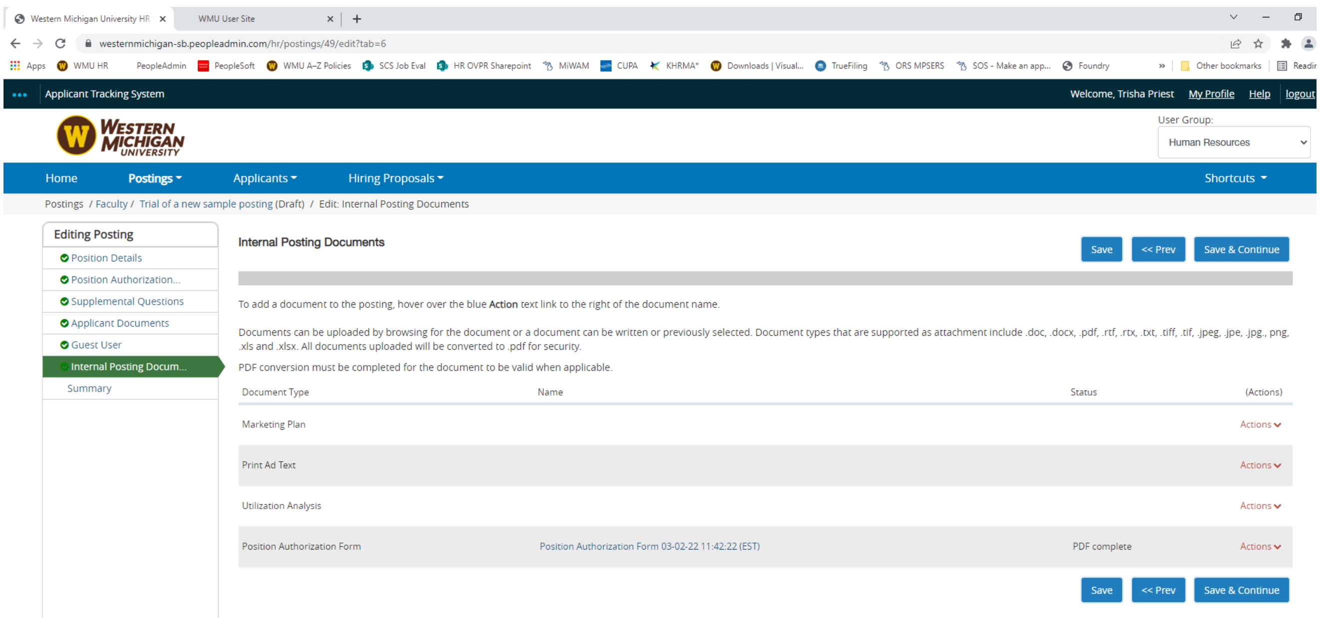
- Click "**Create Guest User Account**" to establish the login criteria for the posting.

- The system will auto assign a username. Please update the password using the instructions on the Help Post document – Facxxxx – where the x's represent the 4-digit position number. Click "**Update Password**" when finished.
- Departments may also wish to send this information directly to their Guest Users via the applicant tracking system. If you add a Guest User email address, the specified Guest User(s) will receive a username, password and link to access posting from a system generated email once position is posted.

Posting Documents:

To add a document to the posting, hover over the red "**Actions"** text link to the right of the document name and select "**Upload New**". This will allow for you to upload the current document for each type. You will be able to upload new documents at any time in the future.

Below is a screen shot of documents that can be added (note, this shows a Position Authorization Form was successfully uploaded):

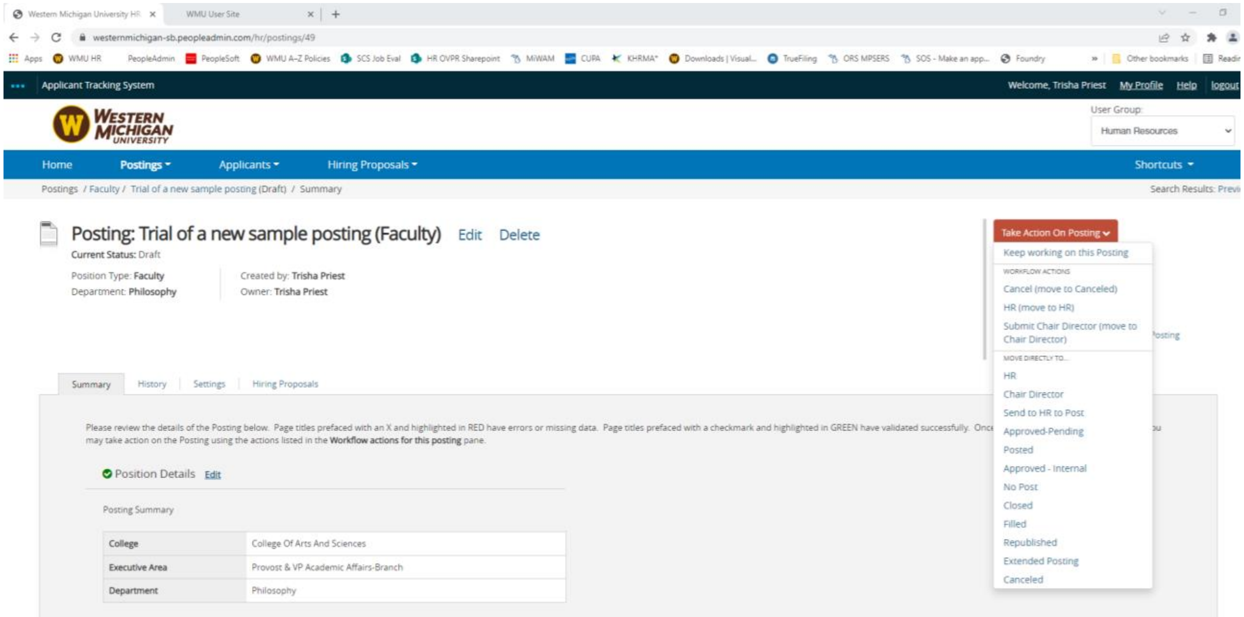


Click on the "**<u>Save & Continue"</u>** button. A summary of the posting will appear. <u>Please review the details of the posting carefully before continuing</u>. Each section must have a green check mark before you will be able to proceed. If there is a red exclamation point , you will need to click "edit" next to the section and correct the errors.

It might be helpful to click on the "**<u>See how Posting looks to Applicant"</u>** button. This is what the applicant will see when searching for positions.

Posting Draft Completed (Submit to Chair/Director for Review/Approval):

Now you will click on the Orange "**<u>Take Action on Posting</u>**" button. Select "**Submit Chair Director (move to Chair Director)"** to allow for the Chair/Director to review the posting. **(Sample screenshot below)**

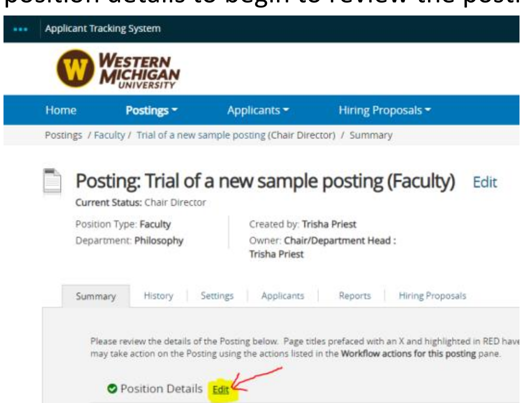


<u>Review and Approve Job Posting (Chair/Director):</u>

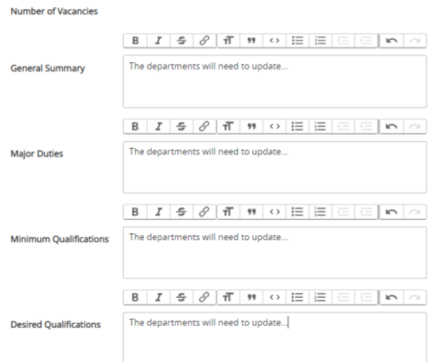
<u>**Overview**</u>: The Chair/Director will receive notification of a job posting available for review. The Chair/Director will either be able to propose changes to the posting back to HR, or could submit the posting to HR to post. When the posting has been approved by the Chair/Director, Human Resources will approve and post to website.

The Chair/Director logs into the system via the admin portal: https://www.wmujobs.org/hr .
Ensure the user group is set to "**Chair/Director"**. The draft posting may be found: on this main page in the **Inbox** portion of the website; or, the Chair/Director may select "**Postings"**, then "**Faculty"** to search for the specific posting. Click the title of the posting to open the posting details.

The posting will appear on the screen on the Summary tab of the posting. The Chair/Director may select "edit" next to position details to begin to review the posting.



The Chair/Director must update the General Summary, Major Duties, Minimum Qualifications and Desired Qualifications for a position. Once updated, click blue “Save & Continue” box to continue reviewing additional screens.



- Applicant Documents
- Guest User
- Internal Posting Documents
- Take Action on Posting:
  - If there are no other changes necessary, the Chair/Director will need to click on the orange “**Take Action on Posting”** button and click “**Submit to HR to post (move to send to HR to Post)”.** This action will prompt a box to open allowing for the Chair/Director to select the specific HR Representative and to add additional comments to HR.
  - If there are changes necessary, the Chair/Director will need to communicate these changes to Human Resources. The Chair/Director will need to then click on the orange “**Take Action on Posting”** button and click “**Submit for Review (move to HR)”.** This action will prompt a box to open allowing for the Chair/Director to add additional comments to HR. Human Resources will make changes and forward the posting back to the Chair/Director for another review before posting.

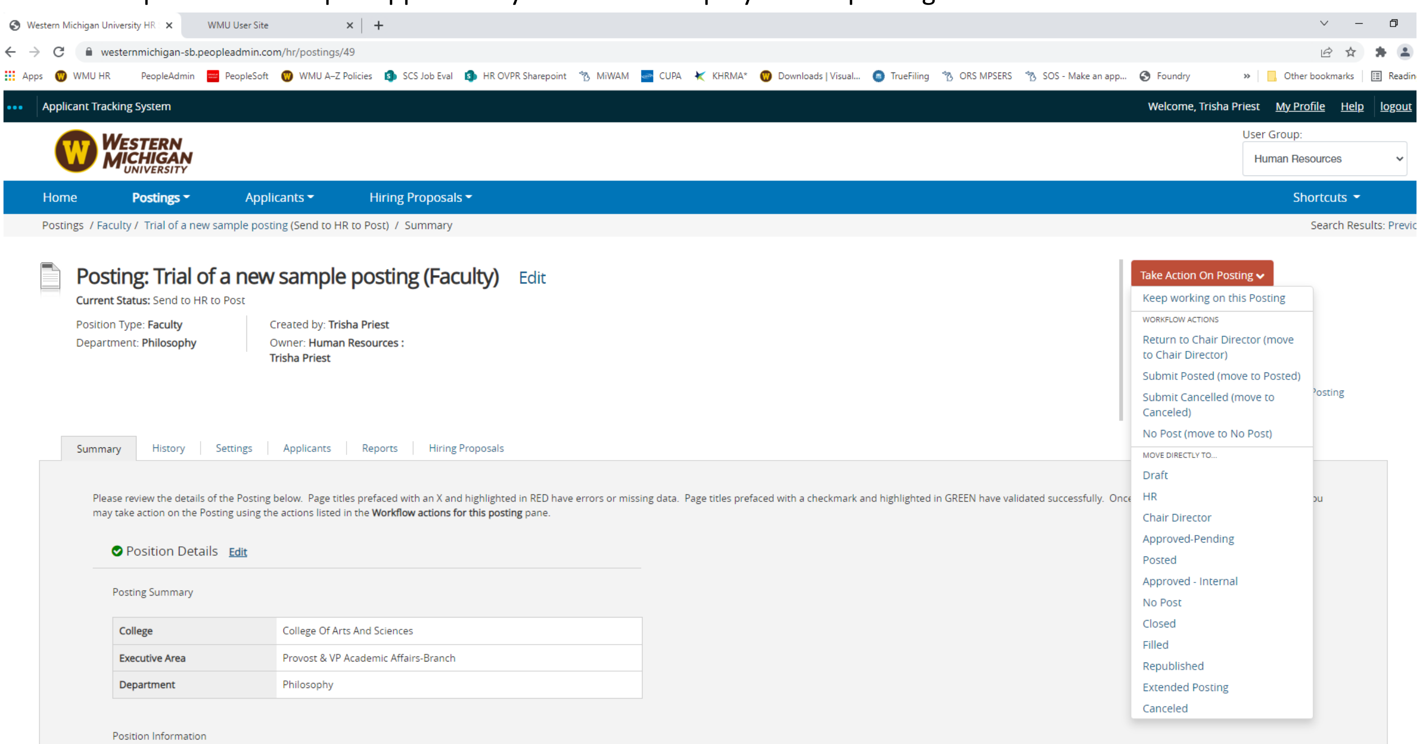
Human Resources will receive the notification of the status change which will reflect “send to HR to Post”. Based on conversations with the department, HR will finalize the posting and will post per the department’s request.

Post Job Posting (Human Resources):

Human Resources will review the posting one last time before starting the final posting process. When ready, HR will access the posting via the draft posting. On the summary tab, next to the bolded position title, click “**Edit**”. In position details, scroll down to the section noting the posting dates and populate the appropriate dates as needed per the specific posting process. For most faculty position, “Open Until Filled” should read “Yes”. Click **“Save”. (Sample screenshot below).**

HR will click "**Summary**" on the left-hand navigator. HR will then click the orange "**Take Action on Posting**" button and select the proper posting method:

- Return to Chair Director (move to Chair Director) – send back to Chair Direct if you have questions.
- Submit Posted (move to Posted) – this will post the position live, either internally, externally, or simultaneously, based on dates provided.
- Submit Cancelled (move to cancelled)
- No Post (move to No Post) – this will activate the Quick Link for the applicant to apply to the No-Post position. No-post's must be pre-approved by Institutional Equity before posting.



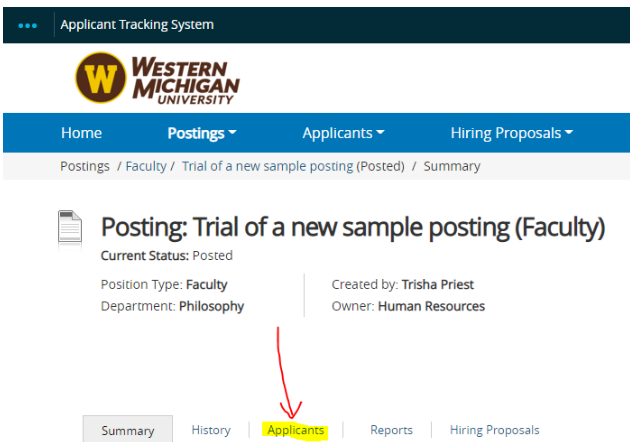
The posting will be able to receive applications based on the posting live date.

Reviewing Applications (Chair/Director):

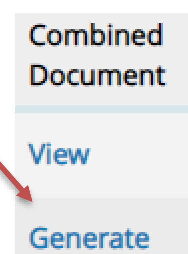
Chair/Director will have access to applicants as they apply to the posting. As a reminder, Guest User access will need to be provided to access applicants as seen on the Guest User tab within the posting. Although Guest Users may view the applications, they will not be able to move/advance the applicant within the applicant tracking system.

View applicants:

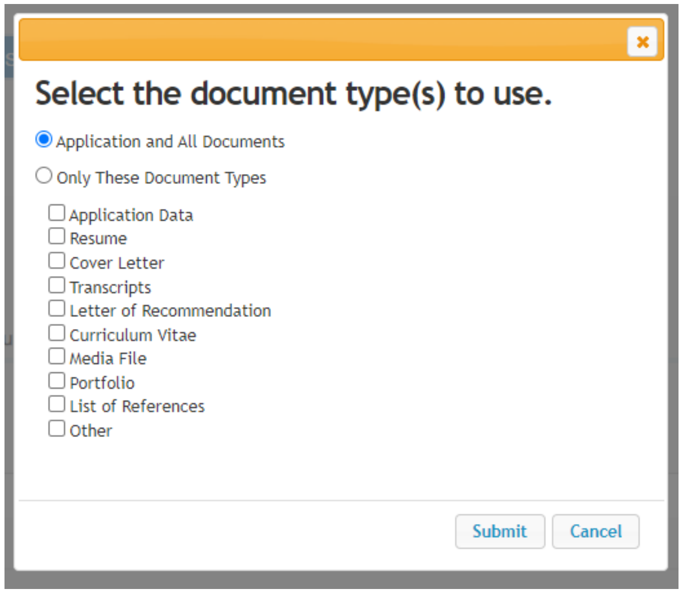
- Log into the applicant tracking system via the admin portal: https:// www.wmujobs.org/hr.
- Ensure the appropriate user group in the upper right-hand corner is set to: "Chair/Director".
- Click "**Postings**" in the blue bar and then select "**Faculty**".
- Select or search for your posting. When found, click the title of the position to open the posting. The posting will open to the Summary tab on your posting. Click "**Applicants**" tab. You now will be able to view all the applicants that have applied (See screenshot below).



- To view applicant materials:
  1. Individually: you may either click on the applicant's name, or click on the red "**Actions**" next to their name and select "**View Application**" or click on "Generate" and this will create a pdf document with all of the documents for this candidate (application, resume, CV etc.)

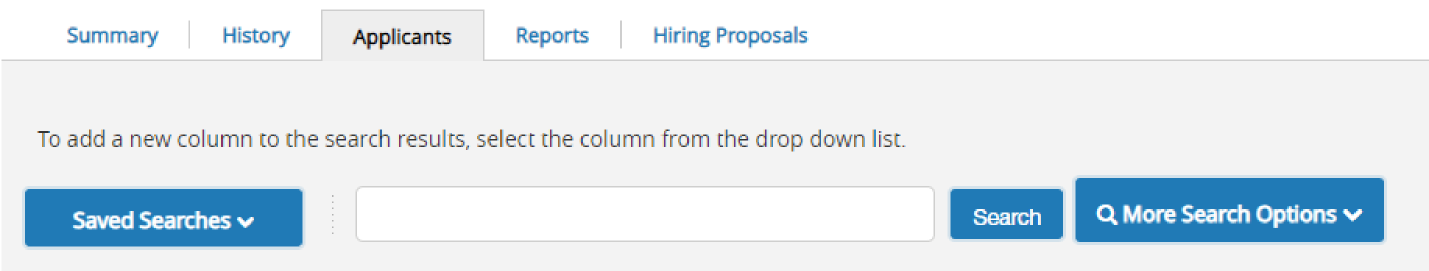


  2. Multiple: if you wish to view more than one applicant at a time just put a check by their names or a check at the top of list by Applicant Last Name to show all. Now click on the orange "**Actions**" button on the right side and click "**Download Applications as PDF**". This will let you view the applicant(s) application and attached requested materials. You can also print this list.

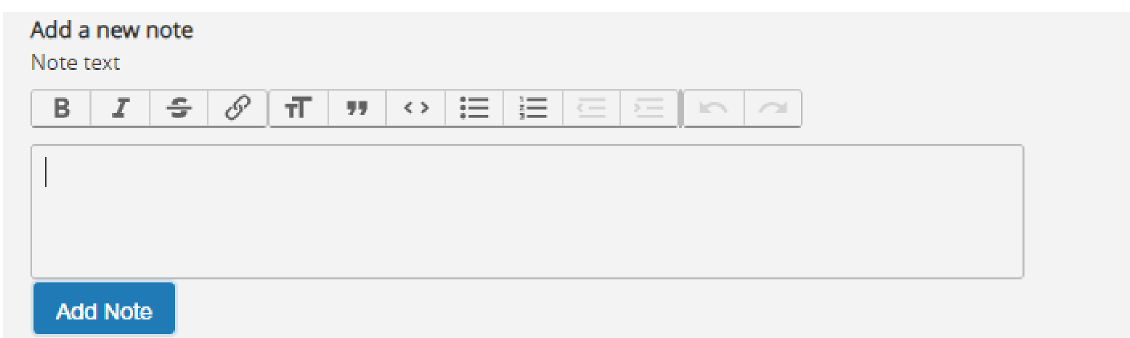


Manage Applicant Pool:

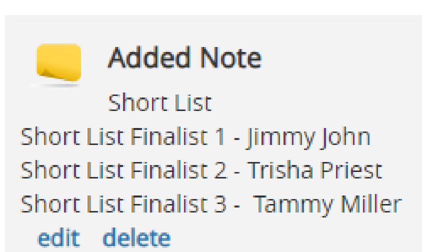
This step allows Chair/Director to manage the applicant pool while processing applicants in the system. You will need to ensure User Group (upper right-hand side) is set at “Chair/Director” for this to work.   Click on the Applicants tab.



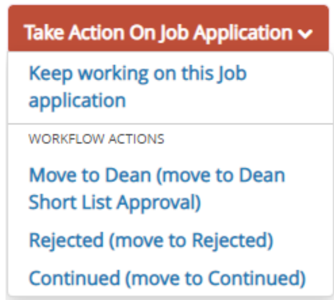
You will see all of the applicants for this position. Review all of applicants and determine who you want to send to the short-list for approval to interview. Once determined go to the “History” tab and go to the bottom of the page and add a note.



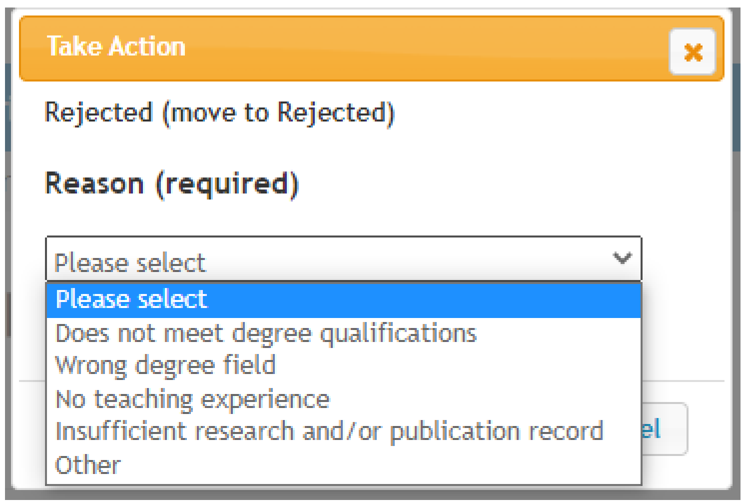
The note should look like this.



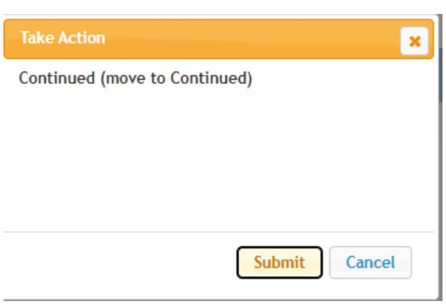
You will need to dispense each applicant and determine your short list.   You can dispense each applicant by clicking on their name and then click on the Orange "**Take Action on Job Application**" button within the applicant's job application. You will have 3 workflow state options to choose from. Each applicant will fall into one of these Workflow actions.



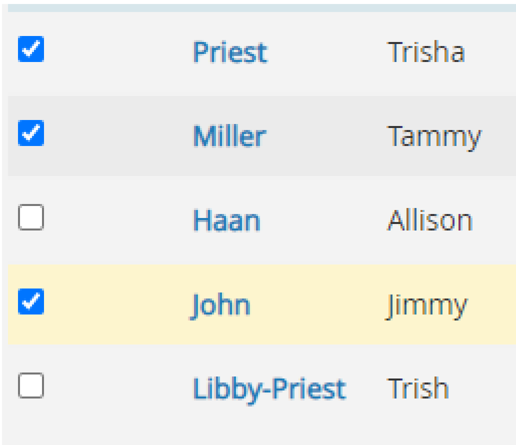
Rejected – **Inactive status**…Do not have the qualifications you are looking for. You will need to choose a "Reason".



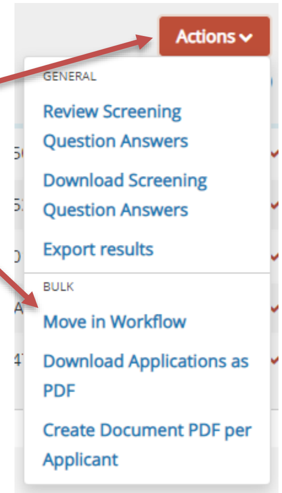
Continued - **inactive status**…these are the candidates that meet the minimum qualifications and have not been ruled out yet. May come back to this list.



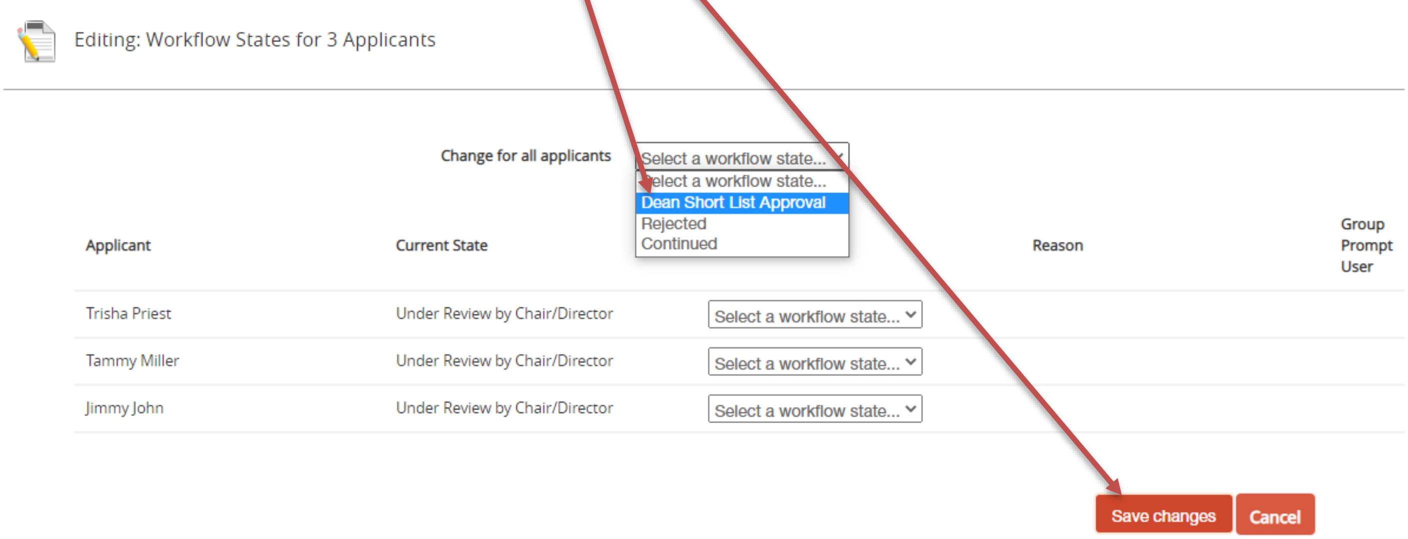
Those applicants chosen for the shortlist will be moved to "move to Dean (move to Dean Short List Approval)". Choose those on the shortlist by checking the box next to their names.



Click on the" Actions" Button and then chose "Move in Workflow".



Select the "Deans Short List Approval" and then the red "Save changes"



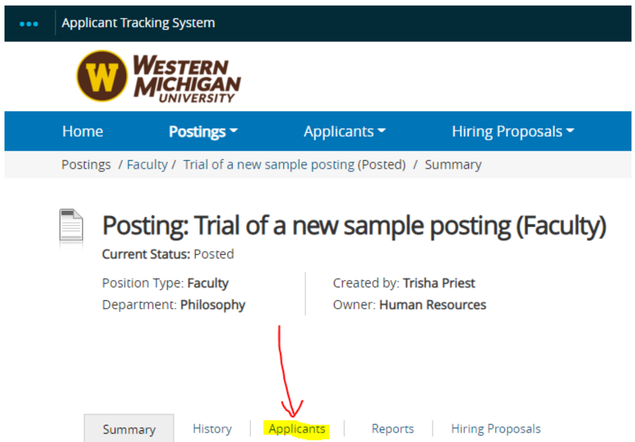
Please note: If specific applicants are not selected for the short list, the Chair/Director will need to change the "remaining" applicants to either Continued or Rejected.

Short List Review (Dean/Division Head)

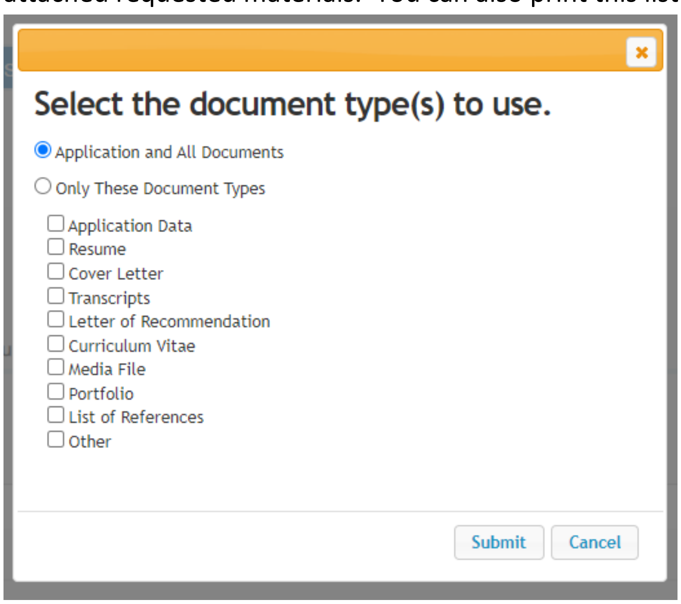
The Dean will be notified when a short list has been sent for review and approval.

View applicants:

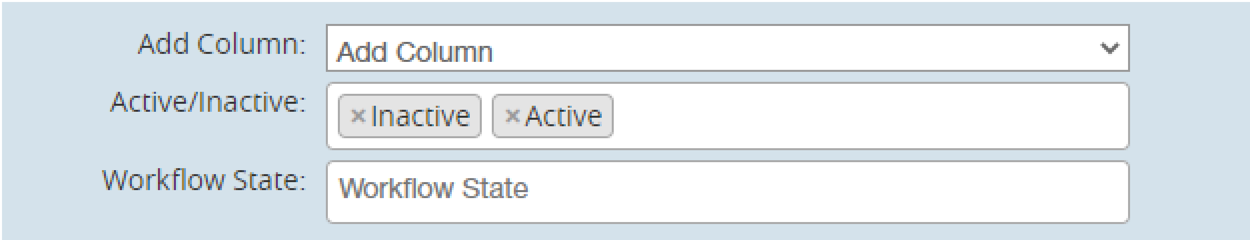
- Log into the applicant tracking system via the admin portal: https://www.wmujobs.org/hr.
- Ensure the appropriate user group in the upper right-hand corner is set to: “**Dean/Division Head**”.
- Click “**Postings**” in the blue bar and then select “**Faculty**”.
- Select or search for your posting. When found, click the title of the position to open the posting. The posting will open to the Summary tab on your posting. Click “**Applicants**” tab. You now will be able to view all the applicants that have applied (See screenshot below) and their respective status within the system.

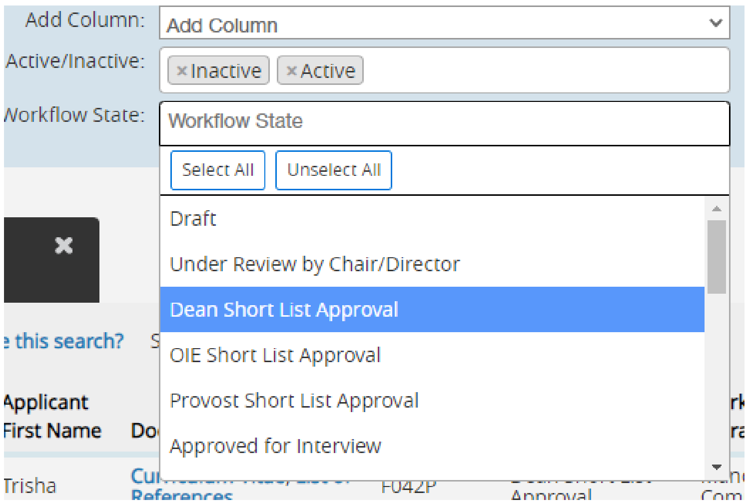


- To view applicant materials:
  1. Individually: you may either click on the applicant’s name, or click on the red “**Actions**” next to their name and select “**View Application**”.
  2. Multiple: if you wish to view more than one applicant at a time just put a check by their names or a check at the top of list by Applicant Last Name to show all. Now click on the orange “**Actions**” button on the right side and click “**Download Applications as PDF**”. This will let you view the applicant(s) application and attached requested materials. You can also print this list.

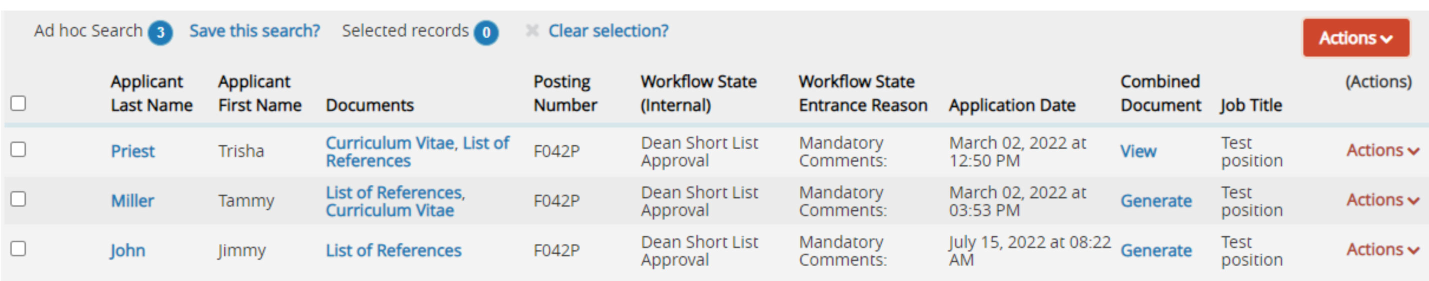


- After reviewing all of the applicants and you are ready to move the applicants to the next workflow step, click on the "More Search Options" button.





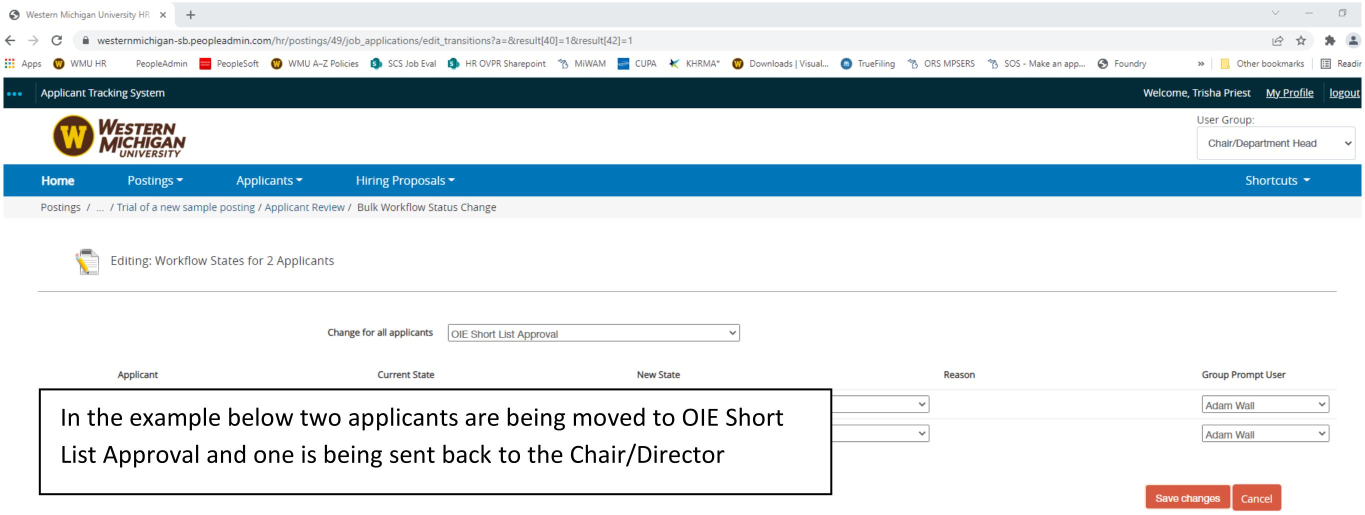
- This will open up additional options. You will then click in the "Workflow State" box and choose "Dean Short List Approval" and enter search. This step is necessary to be able to move to the next step in the workflow.


Ad hoc Search 3 Save this search? Selected records 0 Clear selection? Actions

	Applicant Last Name	Applicant First Name	Documents	Posting Number	Workflow State (Internal)	Workflow State Entrance Reason	Application Date	Combined Document	Job Title	(Actions)
☐	Priest	Trisha	Curriculum Vitae, List of References	F042P	Dean Short List Approval	Mandatory Comments:	March 02, 2022 at 12:50 PM	View	Test position	Actions
☐	Miller	Tammy	List of References, Curriculum Vitae	F042P	Dean Short List Approval	Mandatory Comments:	March 02, 2022 at 03:53 PM	Generate	Test position	Actions
☐	John	Jimmy	List of References	F042P	Dean Short List Approval	Mandatory Comments:	July 15, 2022 at 08:22 AM	Generate	Test position	Actions

- To approve the short list applicants to the next review stage, click the box next to all applicants identified as short list applicants and then click the orange "**Actions**" box. Select bulk "**Move in Workflow**"
- A new screen will open allowing the Dean/Division Head to either "Change for all applicants" or select an individual "new state" for each applicant.
    1. Applicant Workflow Updates:
        - <u>OIE Short List Approval</u> – the top five applicants identified will be sent as short list applicants to OIE to initiate the interview process.
        - <u>Under Review by Chair/Director</u> – this allows for the applicant to be sent back to the Chair/Director for additional review.

See screenshot below



In the example below two applicants are being moved to OIE Short List Approval and one is being sent back to the Chair/Director

- The screen will update to show the current status of the applicants (**see screenshot below**).

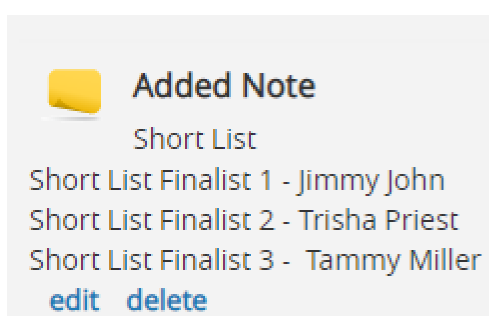
	Applicant Last Name	Applicant First Name	Documents	Posting Number	Workflow State (Internal)	Application Date	
☐	Libby-Priest	Trish	Curriculum Vitae, List of References	F031P	OIE Short List Approval	March 02, 2022 at 12:47 PM	Actions
☐	Priest	Trisha	Curriculum Vitae, List of References	F031P	OIE Short List Approval	March 02, 2022 at 12:50 PM	Actions
☐	Miller	Tammy	List of References, Curriculum Vitae	F031P	Under Review by Chair/Director	March 02, 2022 at 03:53 PM	Actions

<u>Short List Review (IE)</u>

Institutional Equity will be notified when a short list has been sent for review and approval.

<u>View applicants:</u>

- Log into the applicant tracking system via the admin portal: https://www.wmujobs.org/hr .
- Ensure the appropriate user group in the upper right-hand corner is set to: “**IE**”.
- Click “**Postings**” in the blue bar and then select “**Faculty**”.
- Select or search for your posting. When found, click the title of the position to open the posting. The posting will open to the Summary tab on your posting. Click “**Applicants**” tab. You now will be able to view all the applicants that have applied (See screenshot below) and their respective status within the system.
- To view the “Short List” ranking, click on the “History” tab and see the message in notes added by the Chair/Director indicating the ranking.



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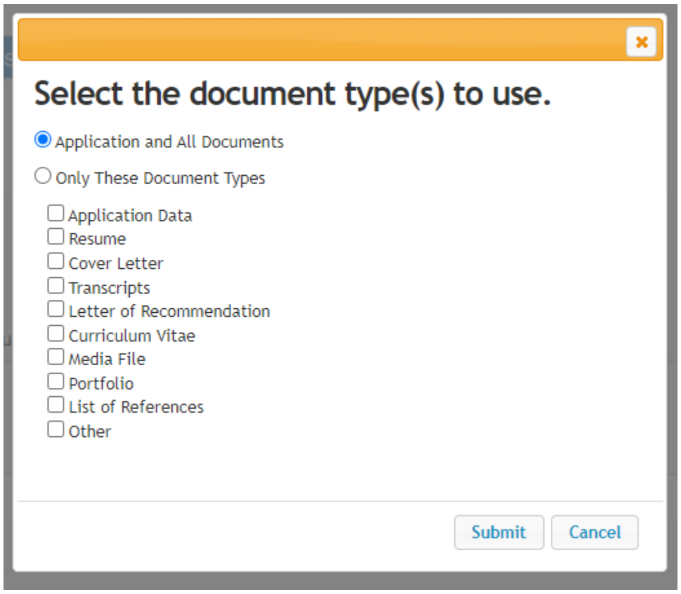
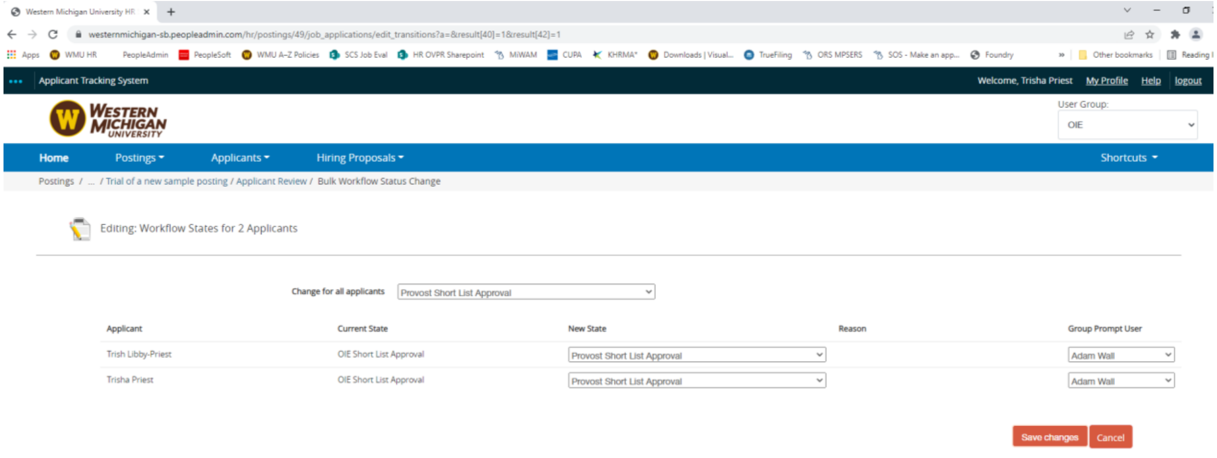
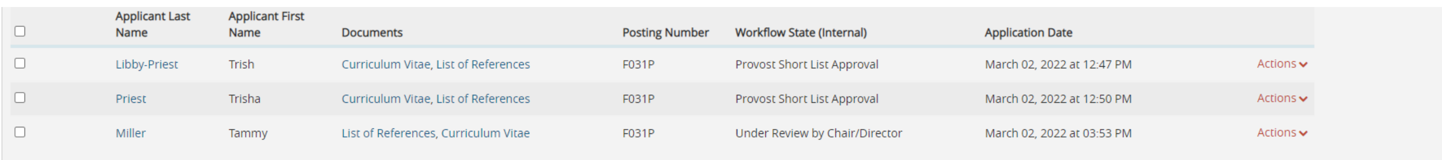


- To approve the short list applicants to the next review stage, click the box next to all applicants identified as short list applicants and then click the orange "**Actions**" box. Select bulk "**Move in Workflow**"
- A new screen will open allowing the Dean/Division Head to either "Change for all applicants" or select an individual "new state" for each applicant.
  1. Applicant Workflow Updates:
     - Provost Short List Approval – the top five applicants identified will be sent as short list applicants to Provost for approval to initiate the interview process.
     - Dean Short List Approval – this allows for the applicant to be sent back to the Dean/Division Head for additional review.
     - Move to… - this option allows for OIE to move to steps in the process, without limitations.

See screenshot below.



- The screen will update to show the current status of the applicants (**see screenshot below**).



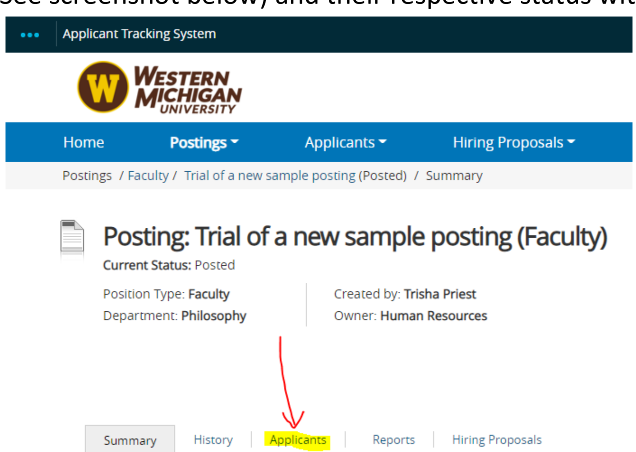
	Applicant Last Name	Applicant First Name	Documents	Posting Number	Workflow State (Internal)	Application Date	
☐	Libby-Priest	Trish	Curriculum Vitae, List of References	F031P	Provost Short List Approval	March 02, 2022 at 12:47 PM	Actions
☐	Priest	Trisha	Curriculum Vitae, List of References	F031P	Provost Short List Approval	March 02, 2022 at 12:50 PM	Actions
☐	Miller	Tammy	List of References, Curriculum Vitae	F031P	Under Review by Chair/Director	March 02, 2022 at 03:53 PM	Actions

Short List Review (Provost)

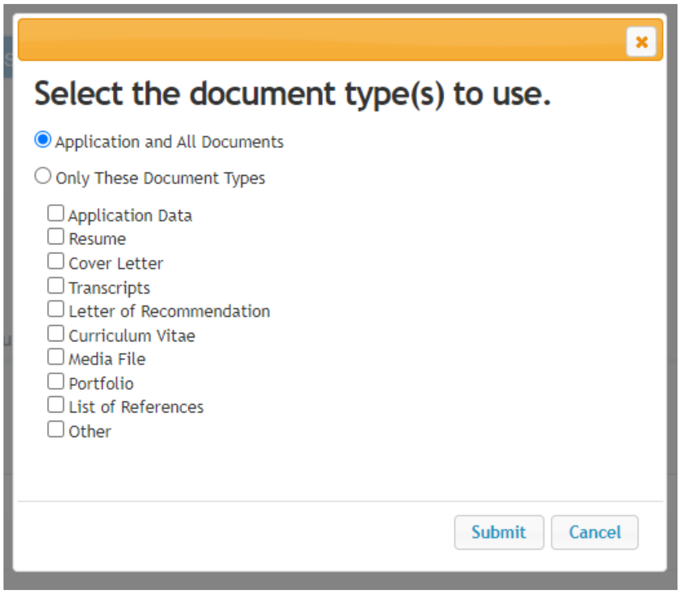
The Provost's Office will be notified when a short list has been sent for review and approval.

View applicants:

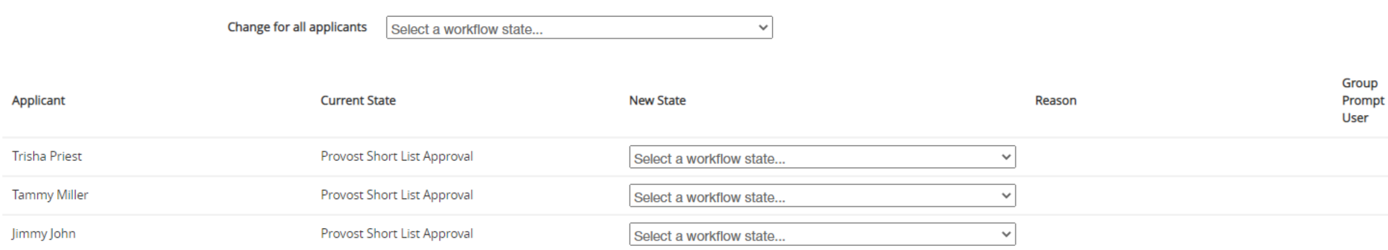
- Log into the applicant tracking system via the admin portal: https://www.wmujobs.org/hr .
- Ensure the appropriate user group in the upper right-hand corner is set to: "**Provost**".
- Click "**Postings**" in the blue bar and then select "**Faculty**".
- Select or search for your posting. When found, click the title of the position to open the posting. The posting will open to the Summary tab on your posting. Click "**Applicants**" tab. You now will be able to view all the applicants that have applied (See screenshot below) and their respective status within the system.



- To view applicant materials:
  1. Individually: you may either click on the applicant's name, or click on the red "**Actions**" next to their name and select "**View Application**".
  2. Multiple: if you wish to view more than one applicant at a time just put a check by their names or a check at the top of list by Applicant Last Name to show all. Now click on the orange "**Actions**" button on the right side and click "**Download Applications as PDF**". This will let you view the applicant(s) application and attached requested materials. You can also print this list.



- To approve the short list applicants to the next review stage, click the box next to all applicants identified as short list applicants and then click the orange "**Actions**" box. Select bulk "**Move in Workflow**"
- A new screen will open allowing the Provost's office to either "Change for all applicants" or select an individual "new state" for each applicant.
  1. Applicant Workflow Updates:
     - Approved for Interview – the top five applicants identified will be approval for the hiring agent or Chair/Director to initiate the interview process.
     - OIE Short List Approval – this allows for the applicant to be sent back to the OIE for additional review.
  2. **See screenshot below.**



Change for all applicants: Select a workflow state...

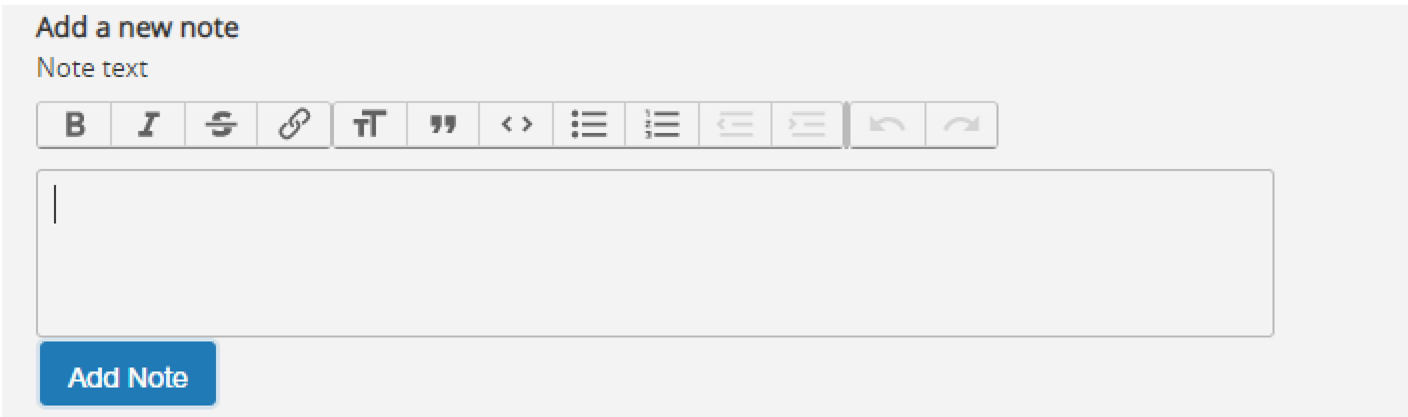
Applicant	Current State	New State	Reason	Group Prompt User
Trisha Priest	Provost Short List Approval	Select a workflow state...		
Tammy Miller	Provost Short List Approval	Select a workflow state...		
Jimmy John	Provost Short List Approval	Select a workflow state...		

- The screen will update to show the current status of the applicants (**see screenshot below**).

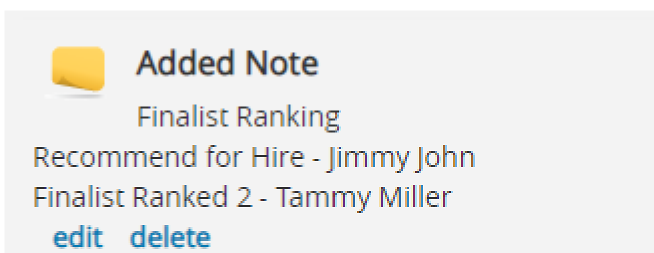
Applicant Last Name	Applicant First Name	Documents	Posting Number	Workflow State (Internal)	Workflow State Entrance Reason	Application Date	Workflow State Owner	Active/Inactive	
Libby-Priest	Trish	Curriculum Vitae, List of References	F031P	Approved for Interview		March 02, 2022 at 12:47 PM	Chair/Department Head : Trisha Priest	Active	Actions
Priest	Trisha	Curriculum Vitae, List of References	F031P	Approved for Interview		March 02, 2022 at 12:50 PM	Chair/Department Head : Trisha Priest	Active	Actions
Miller	Tammy	List of References, Curriculum Vitae	F031P	Under Review by Chair/Director		March 02, 2022 at 03:53 PM	Chair/Department Head	Active	Actions

Interviews / Faculty PAR (Chair/Director)

- Ensure user group is set to “Chair/Director” in the upper right-hand corner.
- Click “**Postings**” in the blue bar and then select “**Faculty**”.
- Select or search for your posting. When found, click the title of the position to open the posting. The posting will open to the Summary tab on your posting. Click “**Applicants**” tab. You now will be able to view all the applicants and their respective status within the system.
- Post interviews, the candidate status for each applicant will need to be updated. Like the Short List approval you will add a note to the “History tab”. Go all the way to the bottom of the page and “Add Note”



- Note should look like this. In most cases you will have a lot more Finalist Ranked.



- After reviewing all of the applicants and you are ready to move the applicants to the next workflow step, click on the “More Search Options” button. In the “Workflow State” choose “Approved for Interview” and then Search.
- If an applicant has been identified as a finalist/recommend for hire, check the box next to the applicant’s name, click the orange “**Actions**” button and select bulk “**Move in Workflow**”.
- A new screen will open allowing Chair/Director to either “Change for all applicants” or select an individual “new state” for each applicant.
    1. Applicant Workflow Updates:
        - Dean Faculty PAR Approval – the top finalists will be sent to the Dean for review/approval for hire
        - Rejected – this will dispense the applicant from moving forward as a finalist.
        - Interviewed, not hired – this will dispense the applicant from moving forward as a finalist.

- Move to… - this option allows for Chair/Director to move to steps in the process, without limitations.

2. **See screenshot below.**

Change for all applicants: Select a workflow state...

Applicant	Current State	New State
Trisha Priest	Approved for Interview	Interviewed not hired
Tammy Miller	Approved for Interview	Dean Faculty PAR Approval
Jimmy John	Approved for Interview	Dean Faculty PAR Approval

- The screen will update to show the current status of the applicants (**see screenshot below**).

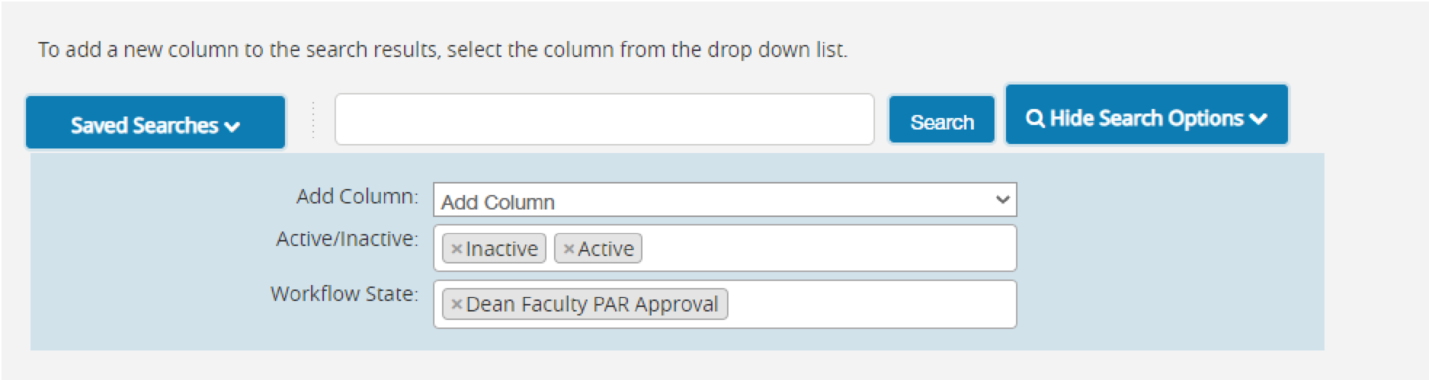
	Applicant Last Name	Applicant First Name	Documents	Posting Number	Workflow State (Internal)	Workflow State Entrance Reason	Application Date	Combined Document	Job Title	(Actions)
☐	Priest	Trisha	Curriculum Vitae, List of References	F042P	Interviewed not hired		March 02, 2022 at 12:50 PM	View	Test position	Actions
☐	Miller	Tammy	List of References, Curriculum Vitae	F042P	Dean Faculty PAR Approval	Mandatory Comments: Move forward	March 02, 2022 at 03:53 PM	Generate	Test position	Actions
☐	Haan	Allison	Curriculum Vitae, List of References	F042P	Rejected	Does not meet degree qualifications:	March 08, 2022 at 10:01 AM	Generate	Test position	Actions
☐	John	Jimmy	List of References	F042P	Dean Faculty PAR Approval	Mandatory Comments: Move forward	July 15, 2022 at 08:22 AM	Generate	Test position	Actions
☐	Libby-Priest	Trish	Curriculum Vitae, List of References	F042P	Continued		March 02, 2022 at 12:47 PM	Generate	Test position	Actions

Faculty PAR (Dean/Division Head)

- Ensure user group is set to "Dean/Division Head" in the upper right-hand corner.
- Click "**Postings**" in the blue bar and then select "**Faculty**".
- Select or search for your posting. When found, click the title of the position to open the posting. The posting will open to the Summary tab for the posting. Click "**Applicants**" tab. You now will be able to view all the applicants and their respective status within the system.
- To review the Finalist List go to the History tab and review the Added Note titled Finalist Ranking.

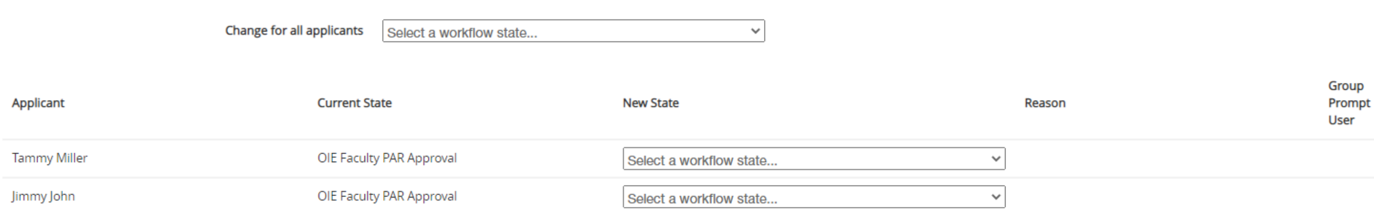
Added Note
Finalist Ranking
Recommend for Hire - Jimmy John
Finalist Ranked 2 - Tammy Miller
edit delete

- After reviewing all of the applicants and you are ready to move the applicants to the next workflow step, click on the "More Search Options" button. In the "Workflow State" choose "Dean Faculty PAR Approval" and then Search.



If an applicant has been identified as a finalist/recommend for hire, check the box next to the applicant's name, click the orange "**Actions**" button and select bulk "**Move in Workflow**".

- A new screen will open allowing Dean/Division Head to either "Change for all applicants" or select an individual "new state" for each applicant.
    1. Applicant Workflow Updates:
        - IE Faculty PAR Approval – the top finalists will be sent to the Dean for review/approval for hire
        - Approved for Interview – send back to Chair Director with questions
        - Rejected – this will dispense the applicant from moving forward as a finalist.
    2. **See screenshot below.**

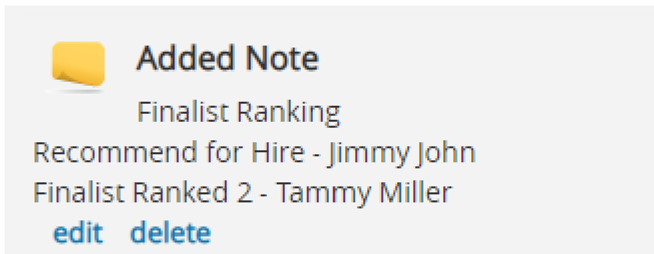


- The screen will update to show the current status of the applicants (**see screenshot below**).

	Applicant Last Name	Applicant First Name	Documents	Posting Number	Workflow State (Internal)	Workflow State Entrance Reason	Application Date	Combined Document	Job Title	(Actions)
☐	Priest	Trisha	Curriculum Vitae, List of References	F042P	Interviewed not hired		March 02, 2022 at 12:50 PM	View	Test position	Actions
☐	Miller	Tammy	List of References, Curriculum Vitae	F042P	OIE Faculty PAR Approval	Mandatory Comments:	March 02, 2022 at 03:53 PM	Generate	Test position	Actions
☐	Haan	Allison	Curriculum Vitae, List of References	F042P	Rejected	Does not meet degree qualifications:	March 08, 2022 at 10:01 AM	Generate	Test position	Actions
☐	John	Jimmy	List of References	F042P	OIE Faculty PAR Approval	Mandatory Comments:	July 15, 2022 at 08:22 AM	Generate	Test position	Actions
☐	Libby-Priest	Trish	Curriculum Vitae, List of References	F042P	Continued		March 02, 2022 at 12:47 PM	Generate	Test position	Actions

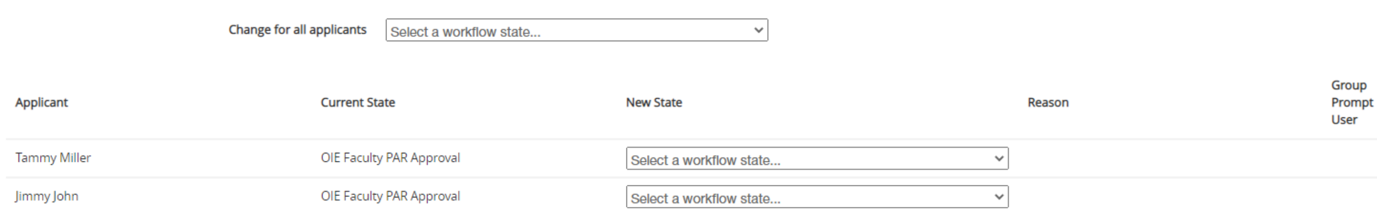
Faculty PAR Review (Institutional Equity):

1. Ensure User Group is set to “IE”.
2. Select “**Postings**” in the blue bar then click “**Faculty**”.
3. Select or search for the specific posting. Click the position title to open the posting.
    a. Review posting details on the Summary Tab.
    b. Review Applicants on the Applicants Tab.
    c. Review Reports on the Reports Tab.
    d. Review added Note in the History Tab indicating the Finalist Ranking/Recommend for hire list.



4. When reviewing the applicants on the Applicants Tab, all applicants should show in the pool, with their respective workflow states reflected.

    a. To review applicant documents, you could review them:
        i. Individually - Click on each applicant to review their specific application and associated documents (documents will display at the bottom or their application).
        ii. Whole pool/multiple applicants –
            1. Place a check in the box to the left of the applicants you wish to review.
            2. Click the orange “**Action**” box above all applicants and select “**Download Applications as PDF**”.
            3. A box to select documents will appear. Make selection and press “Submit”.
5. To approve the Faculty PAR, you will need to place a check next to the “finalists” names. Click the orange “**Actions**” box and select “**Move in Workflow**”.
6. When the editing workflow state screen opens, the workflow states will need to be change for individual applicants to properly move them in the workflow. **(See screenshot below)**



    a. Select option to “Change for all applicants” – choose “**Provost Faculty PAR Approval**”. This will move the applicant(s) to the Provost for review.
    b. Select specific status updates for each applicant (if selected individually).

7. Click orange “**Save changes**” box when you are ready to advance the applicants. Otherwise, click cancel to return to the previous page.
8. The workflow statuses for finalists should appear to be at Provost Faculty PAR Approval.

<u>Faculty PAR Review/Hiring Process (Provost):</u>

- Ensure user group is set to “Provost” in the upper right-hand corner.
- Click “**Postings**” in the blue bar and then select “**Faculty**”.
- Select or search for your posting. When found, click the title of the position to open the posting. The posting will open to the Summary tab for the posting. Click “**Applicants**” tab. You now will be able to view all the applicants and their respective status within the system.
- Review added Note in the History Tab indicating the Finalist Ranking/Recommend for hire list.

Added Note
Finalist Ranking
Recommend for Hire - Jimmy John
Finalist Ranked 2 - Tammy Miller
edit delete

- If an applicant has been identified as a finalist/recommend for hire, check the box next to the applicant’s name, click the orange “**Actions**” button and select bulk “**Move in Workflow**”.
- A new screen will open allowing Provost to either “Change for all applicants” or select an individual “new state” for each applicant.
    - Applicant Workflow Updates:
        - <u>Send to Chair/Director to start Hiring Packet</u> – this will prompt the Chair/Director to begin the hiring packet.
        - <u>OIE Faculty PAR Approval</u> – will the provost return this to OIE?
        - <u>Move to</u>… - this option allows for Chair/Director to move to steps in the process, without limitations.
- **See screenshot below.**

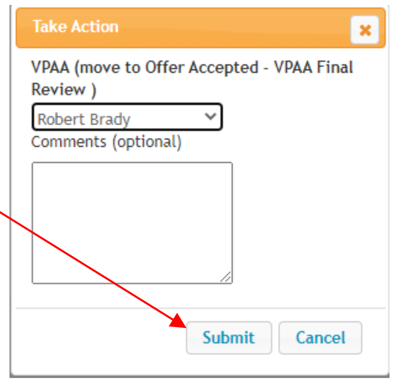
	Applicant Last Name	Applicant First Name	Documents	Posting Number	Workflow State (Internal)	Workflow State Entrance Reason	Application Date	Combined Document	Job Title	(Actions)
☐	Priest	Trisha	Curriculum Vitae, List of References	F042P	Interviewed not hired		March 02, 2022 at 12:50 PM	View	Test position	Actions
☐	Miller	Tammy	List of References, Curriculum Vitae	F042P	Send to Chair/Director to start Hiring Packet	Mandatory Comments:	March 02, 2022 at 03:53 PM	Generate	Test position	Actions
☐	Haan	Allison	Curriculum Vitae, List of References	F042P	Rejected	Does not meet degree qualifications:	March 08, 2022 at 10:01 AM	Generate	Test position	Actions
☐	John	Jimmy	List of References	F042P	Send to Chair/Director to start Hiring Packet	Mandatory Comments:	July 15, 2022 at 08:22 AM	Generate	Test position	Actions
☐	Libby-Priest	Trish	Curriculum Vitae, List of References	F042P	Continued		March 02, 2022 at 12:47 PM	Generate	Test position	Actions

Hiring Proposal (Chair/Director):

- Ensure user group is set to “Chair/Director” in the upper right-hand corner.
- Click “**Postings**” in the blue bar and then select “**Faculty**”.
- Select or search for your posting. When found, click the title of the position to open the posting. The posting will open to the Summary tab for the posting. Click “**Applicants**” tab. You now will be able to view all the applicants and their respective status within the system.
- Check the box to the left of the applicant, whom the hiring proposal should be made. Click the orange “**Actions**” button and select “**Move in Workflow**”.
- Update the applicant’s status to “**Recommend for Hire**”. Click “**Save changes**”.
- Click on the recommend for hire’s last name to view the applicant information page..
- On the right-hand side, in the menu list, there will be a button labeled “**Start ATS Hiring Proposal**”. Click this button.

- Another screen will appear to confirm that you wish to start the process. Click the blue “Start ATS Hiring Proposal” button.
- The Hiring Proposal screens will appear.
- Chair/Director will complete the following offline:
    - Chair/Director prepares the letter of offer using the appropriate form letter template (templates available at https://wmich.edu/provost/manual/templatesandforms).
    - The draft offer letter is sent as an electronic document to the Dean for approval.
    - The Dean sends offer letter to Provost’s office who will approve the offer letter and salary and give approval for offer letter to be sent.
    - Dean will co-sign the letter to be sent.
    - Chair/Director will execute the verbal offer and complete and send offer letter to the candidate.
    - When the offer is accepted, the Chair/Director will complete the Hiring Packet Document: signed letter of offer; signed P-008; signed faculty credential summary; curriculum vita; biographical sketch; inventions, proprietary information, and other intellectual property agreements; and salary election option form and send to the Provost office.
- Once offer is accepted click on the Orange button “Take Action On Hiring Proposal” and choose “VPAA (move to Offer Accepted VPAA Final Review).

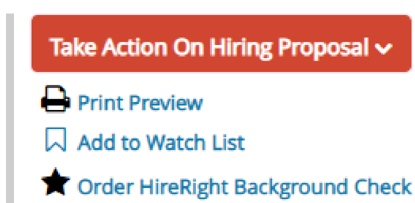
Click on VPAA (move to Offer Accepted – VPAA Final Review). Chair/Director has the opportunity to send a comment. Then click “Submit”.



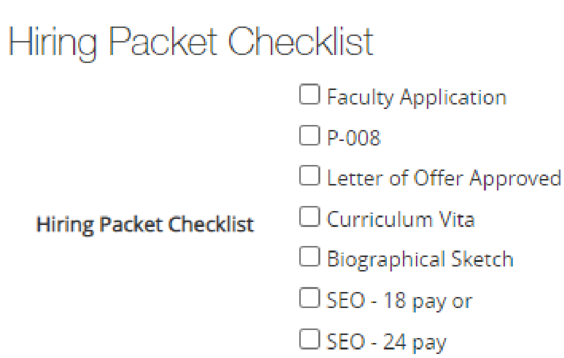
If “Offer Declined” then Chair/Director will go back to the Finalist Ranked 2 and mark them as “Recommend for Hire”. The Hiring Proposal process will start over using this applicant (see previous page).

Hiring Proposal (Provost):

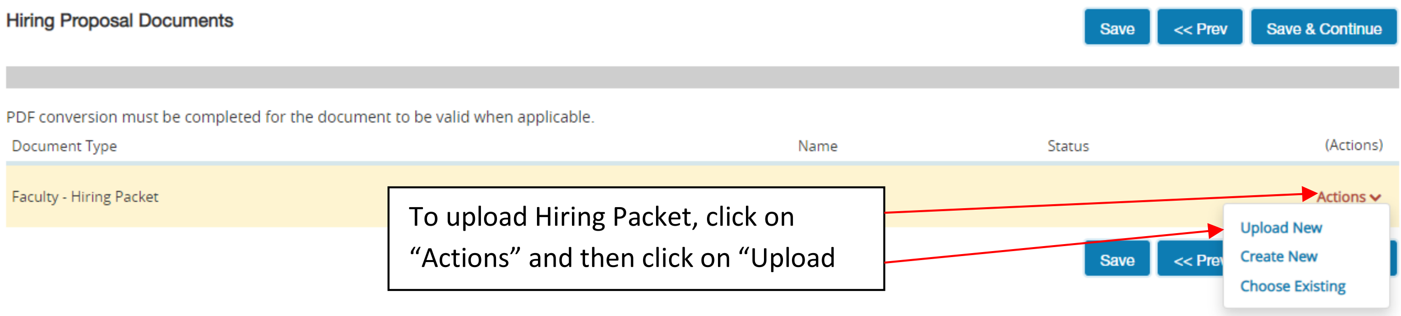
- The Provost will receive an email indicating that an offer has been accepted.
- Provost will “Order HireRight Background Check” by clicking on the link.

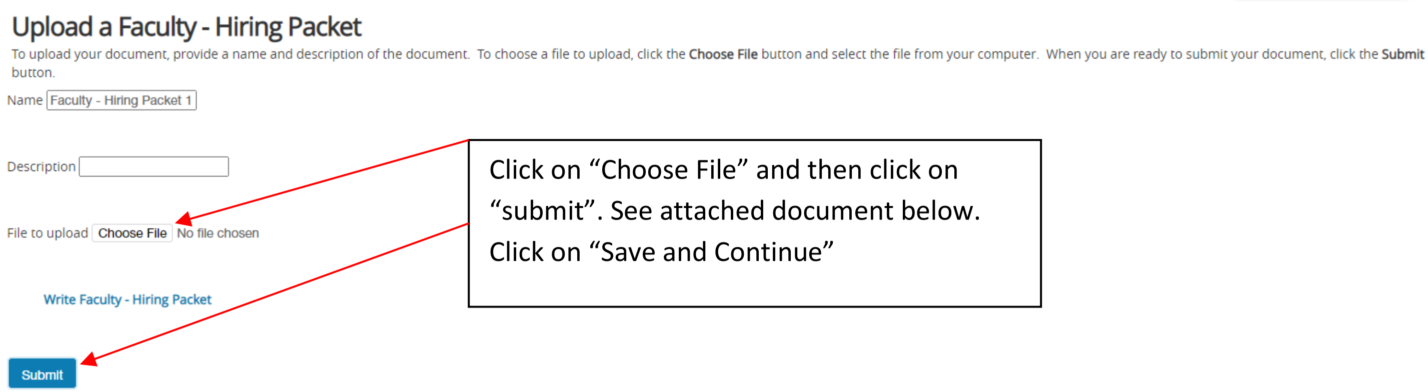


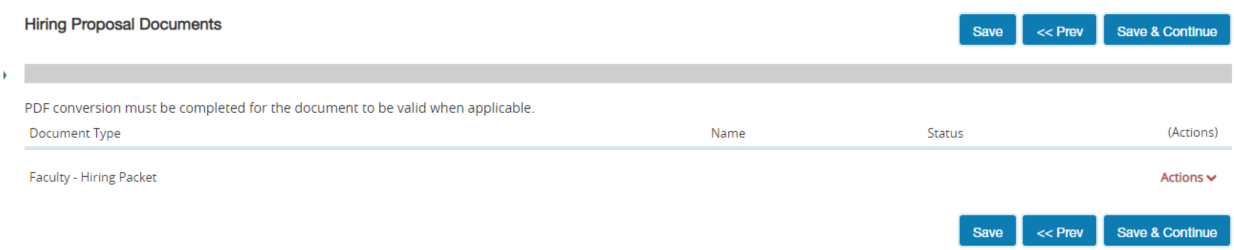
- Reviews the Hiring Packet and completes the Hiring Packet Checklist indicating all documents were sent.



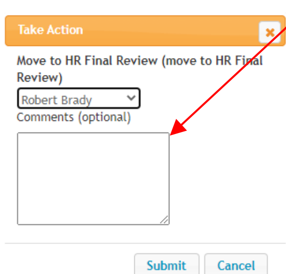
- Provost will upload Hiring Proposal Documents.

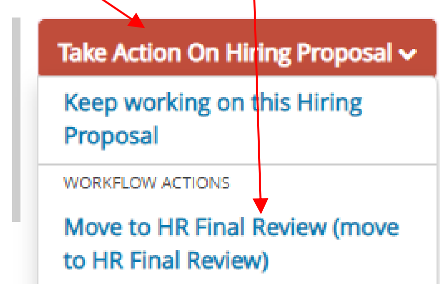






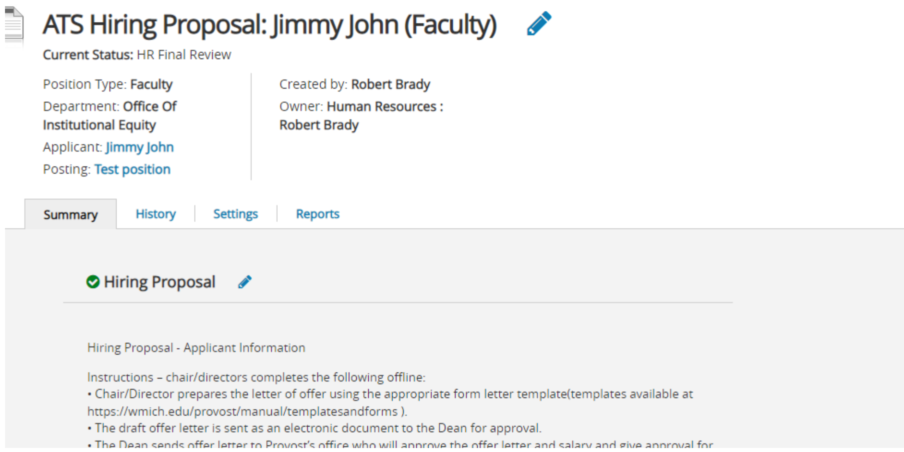
- Provost will click on the orange "Take Action On Hiring Proposal" button and "Move to HR Final Review". You will have the opportunity to add an optional comment, then "Submit".





HR Final Review (Human Resources):

- HR will receive notification to review the hiring proposal. At this point the applicant has been vetted and has accepted the position.
- HR will review the Hiring Packet information.
- Complete the Appointment form. Go to the Hiring Proposal and click on the pencil.



  - Scroll down to the Appointment Form Data. Make sure all information has been input. Appointment Form Data MUST be filled in before marking the candidate as "Hired". Once candidate is marked as "Hired" changes cannot be made to the Appointment Form.
  - Go to the orange "Take Action On Hiring Proposal" and "Move to Hired".

  - Outside of this workflow, HR will go back to the applicants and disposition them:
    - Continued – Not Hired – Those applicants that have been marked Continued will be marked this status.
    - Short List Finalist – Not Hired – Those applicants that have been marked as Finalist will get marked this status.
  - HR will then go back to the posting and mark it as "Filled"
  - HR will send initiate the system to send letters to candidates not chosen.

Overall Summary of Faculty Hiring Process:

1. Complete posting.
2. Route for approval.
3. HR will post when position is received and approved.
4. The posting will be available to start receiving applications.
5. Select the Short List Applicants identified and ranked.
6. The Short List is sent to the Dean for review/approval.
7. The Short List is sent to IE for review/approval.
8. The search committee may begin the interview process with the short list applicants.
    a. If a finalist is identified, the finalist is sent to Dean for review.
    b. If the Dean approves, the finalist is sent to IE for review.
    c. If IE approves, the finalist is sent to the Provost.
    d. When the Provost approves, the Faculty PAR is approved.
    e. The hiring department will begin working with the Provost's office to complete the Hiring Packet.
    f. If the finalist was not identified, the search committee will review the pool for new applicants and the continued applicants to identify a new short list to resubmit for approvals (step 5).
9. Provost's office will approve the offer letter and hiring department will complete verbal offer, and send offer letter to applicant.
10. Provost's office will complete the background checks, as needed.
11. When the Provost has finalized the screening process, the hiring packet will be uploaded into the applicant tracking system.
12. HR will generate the appointment form and designate the position as filled.