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Human Resource Services Applicant Tracking System User Guide for Staff Recruitment (Full Version)

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INTRODUCTION

Login	User Group: All user groups
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Go to <https://my.evergreen.edu/> and sign in using your Evergreen username and password.
Click [Hiring \(Staff and Faculty\)](#).

Select Your User Group	User Group: All user groups
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Use the “**User Group**” drop down near the top right of the screen to select the correct user group for the task you are performing:

- **Initiator** – creates a Posting Request to begin a staff recruitment
- **Appointing Authority** – reviews and approves Posting Requests and Hiring Proposals
- **Budget** – reviews and approves Posting Requests and Hiring Proposals
- **President/Vice President/Provost** – reviews and approves Posting Requests
- **Search Committee Member** – reviews applications and enters evaluative criteria for each applicant
- **Search Committee Chair** – reviews applications, enters evaluative criteria for each applicant, moves applicants through the Application workflow, and uploads documentation to select applicants
- **Supervisor** – initiates Hiring Proposals, makes employment offers, and records the outcome of the offers
- **Human Resources** – manages the applicant tracking system and staff recruitment process

Set Preferences	User Group: All user groups
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Set your default user group and/or preferred first name:

1. Go to <https://my.evergreen.edu/>.
2. Click [Hiring \(Staff and Faculty\)](#).
3. Click on “**My Profile**” near the top right of the screen.
4. Next to User Details, click “**Edit**.”
5. Update the “**First Name**” field with your preferred first name.
6. Locate the “**Preferred Group On Log In**” field and select your preference from the drop down list.
7. Click “**Update User**.”

PHASE 1 – Posting Workflow

Create a New Staff Posting	User Group: Initiator
<ol style="list-style-type: none">1. Go to https://my.evergreen.edu/.2. Click Hiring (Staff and Faculty).3. Verify that you are in the “Initiator” user group using the “User Group” drop down near the top right of the screen.4. Click on the “Postings” tab and select “Staff.”5. Click “Create New Posting” and then “Create from Position Type.”6. Complete the required field(s) on this page and click “Create New Posting.” <i>Note: If you are the Initiator for only one unit, the Division, Department, and Unit fields on this screen will populate automatically. If you are the Initiator for multiple Departments and/or Units, you will need to select to Department/Unit that the position reports to. Selecting the wrong Department and/or Unit may result in email notifications going to the incorrect person when you submit the Posting in the workflow.</i>7. Continue working through each section of the Posting form by completing the required fields and as many desired fields as you’d like, clicking “Next” on each page.8. When you reach the Summary tab, hover over the “Take Action on Request” button and select the appropriate workflow action.9. When the take action dialog box appears, add comments (optional), and click “Submit.”10. An email is sent automatically to the Appointing Authority.	

The workflow for the Posting Request is: Initiator, Appointing Authority, Budget, President/VP/Provost, HRS.

Review and Approve/Deny a Staff Posting	User Group: Appointing Authority, Budget, and President/Vice President/Provost
<ol style="list-style-type: none">1. Go to https://my.evergreen.edu/.2. Click Hiring (Staff and Faculty).3. Verify that you are in the correct user group (Appointing Authority, Budget, or President/Vice President/Provost) using the “User Group” drop down near the top right of the screen.4. In the “Home” tab under “Inbox” click on the Job Title (this takes you to the “Summary” tab of the Posting).5. Review the posting details on the “Summary” tab. <p>If changes are needed:</p> <ol style="list-style-type: none">6. Select “edit” next to the section that needs changes.7. Make changes and click “Next” until you get to the “Summary” tab, or click on “Summary” in the left navigation menu.8. After all changes have been made, follow remaining steps to submit the Posting in the workflow. <p>If no changes are needed:</p> <ol style="list-style-type: none">9. From the “Summary” tab, hover over the “Take Action on Posting” button and select the appropriate workflow action.10. When the take action dialog box appears, add comments (optional), and click “Submit.”11. An email is sent automatically to the next user in the workflow.	

The workflow for the Posting Request is: Initiator, Appointing Authority, Budget, President/VP/Provost, HRS.

PHASE 2 – Application Workflow

Evaluate Applicants	User Group: Search Committee Member and Search Committee Chair
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The assigned HR staff person will email each search committee member a PDF document with all of the application materials received from eligible applicants. Open the PDF, then use the steps below to evaluate each applicant.

1. Go to <https://my.evergreen.edu/>.
2. Click [Hiring \(Staff and Faculty\)](#).
3. Verify that you are in the correct user group (Search Committee Member or Search Committee Chair) using the “**User Group**” drop down near the top right of the screen.
4. Click on the “**Postings**” tab and select “**Staff.**”
5. Click on the Position Title (this takes you to the “**Summary**” tab of the Posting).
6. Go to the “**Applicants**” tab within the Posting.
7. Click on the **Last Name** of the applicant you want to evaluate.
8. Click the “**Evaluate Applicant**” option to the right of the heading section and an adjustable box with an orange heading and the words *Evaluative Criteria* will open; complete each field.
9. Click “**Save**” and you are done with that applicant or click “**Save and Next**” to move to the next applicant in the list automatically.
10. To return to the list of applicants, click “**Applicant Review**” just above the applicant’s name near the top of the page.

View Applicant Evaluations	User Group: Search Committee Member and Search Committee Chair
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1. Go to <https://my.evergreen.edu/>.
2. Click [Hiring \(Staff and Faculty\)](#).
3. Verify that you are in the correct user group (Search Committee Member) using the “User Group” drop down near the top right of the screen.
4. Click on the “**Postings**” tab and select “**Staff.**”
5. Click on the Position Title (this takes you to the “**Summary**” tab of the Posting).
6. Go to the “**Applicants**” tab within the Posting.
7. Hover over the main “**Actions**” button and select “**Download Applicants Evaluations.**”
8. Select “**Download active applicant evaluations**” from the options
9. The results will export to an Excel document. **Note:** *The spreadsheet may need reformatting to be useful.*

After all of the applicants have been evaluate by each search committee member, some or all of the applicants need to be moved in the workflow by the Search Committee Chair. See the [Move Applicants in the Workflow section](#) of this user guide (next section).

Throughout the review and interview stages of the process, the **Search Committee Chair** is responsible for moving applicants in the workflow. This table defines when applicants should be moved and the workflow state options for each move:

When to move applicants	Workflow State Options
After search committee review of applications	<p>After review of applications, the Search Committee Chair should move applicants to one of these three workflow states:</p> <ul style="list-style-type: none"> ○ <i>Reviewed, Approved for Phone Interview</i> ○ <i>Reviewed, Approved for On Campus Interview</i> ○ <i>Reviewed, Not Approved for Interview</i> <p>Note: Leave applicants in “<i>Review by Search Committee</i>” if they are not among the first group selected for an interview but may be contacted for an interview at a later time.</p>
After Phone Interviews (if applicable)	<p>After phone interviews, the Search Committee Chair should move applicants to one of these three workflow states:</p> <ul style="list-style-type: none"> ○ <i>Declined Phone Interview</i> ○ <i>Phone Interview Completed, Approved for On Campus Interview</i> ○ <i>Phone Interview Completed, Not Approved for On Campus Interview</i>
After On Campus Interviews	<p>After on campus interviews, the Search Committee Chair should move applicants to one of these three workflow states:</p> <ul style="list-style-type: none"> ○ <i>Decline Campus Interview</i> ○ <i>On Campus Interview Completed, Recommended for Reference Checks</i> ○ <i>On Campus Interview Completed, Not Recommended for Reference Checks</i>

Tips on moving applicants in the workflow:

- Don't move applicants before the search committee members have finished evaluating applicants. Evaluations can only be completed when applications are in the “*Review by Search Committee*” workflow state.
- Moving applicants will not generate an email to applicants. Talk with the assigned HR staff person about status notifications to applicants.
- If you accidentally moved an applicant to the wrong workflow state or circumstances have changed and you need to modify an applicant's workflow state, contact the assigned HR staff person for assistance.

How to Move Applicants:

1. Go to <https://my.evergreen.edu/>.
2. Click **Hiring (Staff and Faculty)**.
3. Verify that you are in the correct user group using the “**User Group**” drop down near the top right of the screen.
4. Click on the “**Postings**” tab and select “**Staff**.”
5. Click on the Position Title (this takes you to the “**Summary**” tab of the Posting).
6. Go to the “**Applicants**” tab within the Posting, then choose one of the two options below.

Option 1 - Move one application at a time:

7. Click on the applicant's **Last Name**.
8. Hover over the “**Take Action on Job Application**” button and select the appropriate workflow action.
9. Click “**Submit**.”
10. Return to the list of Applicants on the Applicant Tab. **Note:** You may need to refresh the page to see the updated workflow state.
11. Repeat these steps for each applicant you need to move or try a bulk move using the next set of steps.

Option 2 - Move multiple applicants at a time (bulk move):

7. Check the boxes next to the applicants to be moved.
8. Hover over the main “**Actions**” button and select “**Move in Workflow.**”
9. Select the correct workflow step from the drop down menu next to each applicant. **Note:** *If all of the applicants are currently in the same workflow state and they are all being moved to the same workflow state next, you can use the drop down menu above the list of applicants.*
10. Click “**Save changes.**” **Note:** *You may need to refresh the page to see the updated workflow state.*

Access Position Description and Interview Questions	User Group: Search Committee Member and/or Search Committee Chair
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1. Go to <https://my.evergreen.edu/>.
2. Click **Hiring (Staff and Faculty)**.
3. Verify that you are in the correct user group (Search Committee Member or Search Committee Chair) using the “**User Group**” drop down near the top right of the screen.
4. Click on the “**Postings**” tab and select “**Staff.**”
5. Click on the Position Title (this takes you to the “**Summary**” tab of the Posting).
6. Scroll down to the “**Internal Posting Documents**” section.
7. Click on the document to open it:
 - a. **Position Description**
 - b. **Interview Questions - Applicant Copy (Staff)** – May be provided to the interviewee during the interview.
 - c. **Interview Questions (Staff)** – Includes the questions, criteria, and space to write notes.
8. Print as many sets as needed.

Upload Post-Interview Strengths and Weaknesses Form	User Group: Search Committee Chair
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Each applicant interviewed must have a **Post-Interview Strengths and Weaknesses Summary form** uploaded to their application by the Search Committee Chair. The forms should be completed in collaboration with the search committee members and be based on the information learned from the application materials and interviews.

1. Go to <https://my.evergreen.edu/>.
2. Click **Hiring (Staff and Faculty)**.
3. Verify that you are in the correct user group (Search Committee Chair) using the “**User Group**” drop down near the top right of the screen.
4. Click on the “**Postings**” tab and select “**Staff.**”
5. Click on the Position Title (this takes you to the “**Summary**” tab of the Posting).

Access the blank Post-Interview Strengths and Weaknesses Summary form:

6. In the **Summary** tab, scroll to the “**Internal Posting Documents**” section and click on the “**Post-Interview Strengths and Weaknesses (Staff)**” link to open a Word document.
7. Save the document using **Post-Interview Strengths and Weaknesses form** as the name of the document, and fill out one for each person interviewed.
8. Save each completed form as an individual document to be uploaded to the applicant in the system. Use the applicant’s name when naming the document so you can easily find the correct document to upload when the time comes. Example: *Post-Interview Strengths and Weaknesses form – Ellie Hund.*

Upload the completed Post-Interview Strengths and Weaknesses Summary form(s):

9. In the “**Applicants**” tab, click on the **Last Name** of the applicant that you want to upload the document to.
10. Click on the “**Supporting Documents**” tab.

11. Click **“Add Document,”** browse for the **Post Interview Strengths and Weaknesses Summary form** you created for that applicant, add a name and/or description (both are optional), and click **“Submit.”**
Repeat these steps for each applicant interviewed.

Recommend Applicants for Reference Checks	User Group: Search Committee Chair
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After uploading the **Post-Interview Strengths and Weaknesses Summary form**, the Search Committee Chair moves applicants to Recommended for Reference Checks or Not Recommended for Reference Checks. The Supervisor will choose which applicant(s) to conduct reference checks on (reference checks may be waived in some cases). **Note:** *This step must be completed, even if reference checks will be waived.*

1. Go to <https://my.evergreen.edu/>.
2. Click **Hiring (Staff and Faculty)**.
3. Verify that you are in the correct user group (Search Committee Chair) using the **“User Group”** drop down near the top right of the screen.
4. Click on the **“Postings”** tab and select **“Staff.”**
5. Click on the Position Title (this takes you to the **“Summary”** tab of the Posting).
6. Go to the **“Applicants”** tab within the Posting.
7. Click on the applicant’s **Last Name**.
8. Hover over the **“Take Action on Job Application”** button and select the appropriate workflow action:
 - a. *On Campus Interviews Completed, Recommended for Reference Checks* (this action sends the applicant to the Supervisor)
 - b. *On Campus Interviews Completed, Recommended for Not Reference Checks* (this action sends the applicant to the Human Resources)
9. Click **“Submit.”**
10. Return to the list of Applicants on the Applicant Tab (you may need to refresh the page to see the current workflow state).

Repeat these steps for each applicant.

Unless there is a need to conduct additional interviews, the work of the search committee is complete at this point and all applicants should be moved in the system by the Search Committee Chair to HRS or the Supervisor. See the [Move Applicants in the Workflow section](#) above.

Review Post-Interview Strengths and Weaknesses Form(s)	User Group: Supervisor
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Review the **Post-Interview Strengths and Weaknesses Summary form** uploaded to the applicant(s) being recommended for reference checks.

1. Go to <https://my.evergreen.edu/>.
2. Click **Hiring (Staff and Faculty)**.
3. Verify that you are in the correct user group (Supervisor) using the **“User Group”** drop down near the top right of the screen.
4. Click on the **“Postings”** tab and select **“Staff.”**
5. Click on the Position Title (this takes you to the **“Summary”** tab of the Posting).
6. In the **“Applicants”** tab, click on the **Last Name** of the applicant.
7. Click on the **“Supporting Documents”** tab.
8. Open the **Post-Interview Strengths and Weaknesses Summary form** for this applicant.
9. Review the form to determine if you want to conduct reference checks on the applicant.

Repeat these steps for each applicant recommended for reference checks.

Conduct Reference Checks

1. Go to <https://my.evergreen.edu/>.
2. Click [Hiring \(Staff and Faculty\)](#).
3. Verify that you are in the correct user group (Supervisor) using the “**User Group**” drop down near the top right of the screen.
4. Click on the “**Postings**” tab and select “**Staff.**”
5. Click on the Position Title (this takes you to the “**Summary**” tab of the Posting).

Before contacting references, access the blank Reference Checking form:

6. In the **Summary** tab, scroll to the “**Internal Posting Documents**” section and click on the “**Reference Checking form (Staff)**” link to open a Word document.
7. Save the blank form.
8. Outside of the system, conduct reference checks and fill out one **Reference Checking form** for each reference checked. Save each completed form use a descriptive naming structure, including the applicant’s name.

After contacting references, upload the completed Reference Checking form(s):

9. In the “**Applicants**” tab, click on the **Last Name** of the applicant that you want to upload the document to.
10. Click on the “**Supporting Documents**” tab.
11. Click “**Add Document,**” browse for the completed **Reference Checking form** you created for that applicant, add a name and/or description (optional), and click “**Submit.**” Perform this step for each **Reference Checking form** you need to upload, making sure to attach the correct form(s) to the correct applicant(s).
12. After all reference checks have been completed, move each applicant in the workflow to one of these three workflow states: “**Reference Checks Completed or Not Required, Recommended for Hire**” (this is the person you want to offer the position to), “**Reference Checks Completed, Not Recommended for Hire,**” or “**Reference Checks Not Completed, Not Recommended for Hire.**”

How to Move Applicants:

- a) Go to <https://my.evergreen.edu/>.
- b) Click [Hiring \(Staff and Faculty\)](#).
- c) Verify that you are in the correct user group (Supervisor) using the “**User Group**” drop down near the top right of the screen.
- d) Click on the “**Postings**” tab and select “**Staff.**”
- e) Click on the Position Title (this takes you to the “**Summary**” tab of the Posting).
- f) Go to the “**Applicants**” tab within the Posting, then choose one of the two options below.
- g) Click on the applicant’s **Last Name**.
- h) Hover over the “**Take Action on Job Application**” button and select the appropriate workflow action.
- i) Click “**Submit.**”
- j) Return to the list of Applicants on the Applicant Tab (you may need to refresh the page to see the current workflow state).

Repeat these steps for each applicant you need to move.

13. Start a Hiring Proposal for the person you want to hire using the instructions in the next section: [Phase 3 – Hiring Workflow](#).

Waive Reference Checks

In consultation with the assigned HR staff person, the Supervisor may opt to waive the reference checking step. If waiving reference checks, move the finalist to “**Reference Checks Completed or Not Required, Recommended for Hire**” and start a Hiring Proposal for the person you want to hire using the instructions in the next section: [Phase 3 – Hiring Workflow](#).

PHASE 3 – Hiring Workflow

Initiate and Process Hiring Proposals	User Group: Supervisor, Appointing Authority, and Budget
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Introduction - Contact HRS to find out if a background check will be done for this search

- Yes, a background check will be conducted. Go to section [A. Recruitments with a background check](#).
- No, a background check will **not** be conducted. Go to section [B. Recruitments without a background check](#).

A. Recruitments WITH a background check

Workflow:



The eight steps in this workflow are described in detail below.

Step 1: Supervisor initiates Hiring Proposal

The purpose of this step is to identify the finalist for the Appointing Authority who must approve or deny the selection. **Note:** *The Hiring Proposal is not used to get approval for salary amount or relocation compensation. Work with the HR point person and Appointing Authority on those details outside the system.*

1. Go to <https://my.evergreen.edu/>.
2. Click [Hiring \(Staff and Faculty\)](#).
3. Verify that you are in the “**Supervisor**” user group using the “**User Group**” drop down near the top right of the screen.
4. Click on the “**Postings**” tab and select “**Staff.**”
5. Click the Position Title (this takes you to the “**Summary**” tab of the Posting).
6. Go to the “**Applicants**” tab within the Posting.
7. Click on the **Last Name** of the person you want to hire.
8. Make sure the applicant is in the workflow state: “**Reference Checks Completed or Not Required, Recommended for Hire.**”
9. Near the upper right, click “**Start Staff Hiring Proposal.**”
10. Click “**Start Staff Hiring Proposal**” again.
11. Leave the fields blank (salary and start date are entered *after* an offer has been extended and accepted).
12. Click “**Next,**” wait for the page to load, and click “**Next**” again.
13. Hover over the “**Take Action on Hiring Proposal**” button and select “**Send to Appointing Authority.**” A comment option will appear. Comments will be included in the email that goes to the next user in the workflow; comments are optional.
14. Click “**Submit**” and the Hiring Proposal will move to the next step.

Note: Plan to discuss **compensation** and **start date** outside of the system. The assigned HR staff person will send the Supervisor the salary range and tips to make the offer via email after the Hiring Proposal arrives in HRS (see step 3).

Step 2: Appointing Authority approves or denies Hiring Proposal

Review the Pre-Offer Hiring Proposal created by the Supervisor. Plan to discuss compensation and start date outside of the system. HRS will send the salary range to the Supervisor once the Hiring Proposal arrives in HRS via the workflow (see step 3). **Important:** Relocation compensation must be approved in advance of the offer and in accordance with the Relocation Compensation policy posted at www.evergreen.edu/policies.

Appointing Authority approves or denies the Hiring Proposal:

1. Go to <https://my.evergreen.edu/>.
2. Click **Hiring (Staff and Faculty)**.
3. Verify that you are in the “**Appointing Authority**” user group using the “**User Group**” drop down near the top right of the screen.
4. Click on the “**Hiring Proposals**” tab and select “**Staff**.”
5. Click the “**First Name**” of the finalist to open the Hiring Proposal.
6. Approve or deny to Hiring Proposal by hovering over the “**Take Action on Hiring Proposal**” button.
Approve = send to HR. **Deny** = Return to Supervisor. A comment option will appear. Comments will be included in the email that goes to the next user in the workflow; comments are optional.
7. Click “**Submit**” and the Hiring Proposal will move to the next step.

Step 3: HRS reviews Hiring Proposal

If the Appointing Authority approves the Hiring Proposal and moves it forward, HRS will review and, unless there are significant concerns, HRS will approve the Hiring Proposal on to the Supervisor. HRS will follow up with the Supervisor via email to provide the salary range that can be offered and advice on negotiating salary and start date.

Step 4: Supervisor extends **conditional offer; moves Hiring Proposal to HRS**

Once the Hiring Proposal arrives back to the Supervisor, the **conditional** offer is made outside of the system, then the Supervisor moves the Hiring Proposal back to HRS, indicating if the **conditional** offer was accepted or declined. Moving the Hiring Proposal to HRS allows HRS to start the background check.

1. Go to <https://my.evergreen.edu/>.
2. Click **Hiring (Staff and Faculty)**.
3. Verify that you are in the “**Supervisor**” user group using the “**User Group**” drop down near the top right of the screen.
4. Click on the “**Hiring Proposals**” tab and select “**Staff**.”
5. Click the “**First Name**” of the finalist to open the Hiring Proposal.

If the **conditional offer was declined:**

6. Hover over the “**Take Action on Request**” button and select “**Send to Human Resources (move to Conditional Offer Extended and Declined)**.” A comment option will appear. Comments will be included in the email that goes to the next user in the workflow; comments are optional.
7. Click “**Submit**” and contact HRS to discuss next steps.

If the **conditional offer was accepted:**

6. Hover over the “**Take Action on Request**” button and select “**Send to Human Resources (move to Conditional Offer Extended and Accepted)**.” A comment option will appear. Comments will be included in the email that goes to the next user in the workflow; comments are optional.
7. Click “**Submit**” and the Hiring Proposal will move to the next step.
8. HRS will initiate the background check.

Step 5: HRS initiates the background check

When the Hiring Proposal arrives in HRS, the background check process will be initiated. The process varies depending on the applicant's residency history. Depending on the type of background check required, the finalist will be contact by HRS or a third party background check company. If the background check is not successfully completed by the finalist, HRS will work with the Appointing Authority and the Supervisor on next steps. If the background check is successfully completed by the finalist, HRS will move the Hiring Proposal to the Supervisor so they can confirm the offer with the finalist.

Step 6: Supervisor confirms offer; updates Hiring Proposal

After the background check has been completed and the Hiring Proposal goes to the Supervisor to confirm the offer (salary and start date) with the finalist outside of the system, then the Supervisor records the outcome of the offer in the Hiring Proposal by following these steps:

1. Go to <https://my.evergreen.edu/>.
2. Click Hiring (Staff and Faculty).
3. Verify that you are in the **"Supervisor"** user group using the **"User Group"** drop down near the top right of the screen.
4. Click on the **"Hiring Proposals"** tab and select **"Staff."**
5. Click the **"First Name"** of the finalist to open the Hiring Proposal.

It is possible that the finalist declines the position, even though they passed the background check. If that happens, complete this step:

6. Hover over the **"Take Action on Request"** button and select **"Send to Human Resources (move to Offer Extended and Declined)"** and contact HRS to discuss next steps.

If the post-background check offer was accepted:

6. Click **"Edit"** in the heading or next to **Hiring Proposal** in the **Summary** tab.
7. Use the **Monthly Salary Amount** field to enter the agreed upon amount.
8. Use the **Start Date** field to enter the agreed upon date.
9. If applicable, use the **Relocation Compensation** section to enter agreed upon details (**Important:** Relocation compensation must be approved in advance of the offer and in accordance with the Relocation Compensation policy posted at www.evergreen.edu/policies).
10. Click **Next**.
11. The **Next** button will take you to the section called **Hiring Proposal Documents**. There is no action required in this section, click **Next** and you will return to the **Summary** tab.
12. On the **Summary** tab, hover over the **"Take Action on Hiring Proposal"** button and select **"Send to Budget (move to Offer Extended and Accepted, Budget review)."** A comment option will appear. Comments will be included in the email that goes to the next user in the workflow; comments are optional.
13. Click **"Submit"** and the Hiring Proposal will move to the next step.
14. Collect and return all paper materials generated during the search to HRS.

Step 7: Budget reviews Hiring Proposal

The Hiring Proposal moves to the divisional Budget Coordinator for informational purposes. Budget should review the information and move the Hiring Proposal as quickly as possible so HRS can finalize the hire, including sending the hire letter and onboarding information to the new employee.

1. Go to <https://my.evergreen.edu/>.
2. Click Hiring (Staff and Faculty).
3. Verify that you are in the **"Budget"** user group using the **"User Group"** drop down near the top right of the screen.
4. Click on the **"Hiring Proposals"** tab and select **"Staff."**
5. Click the **"First Name"** of the finalist to open the Hiring Proposal.
6. Review the information in the Hiring Proposal.

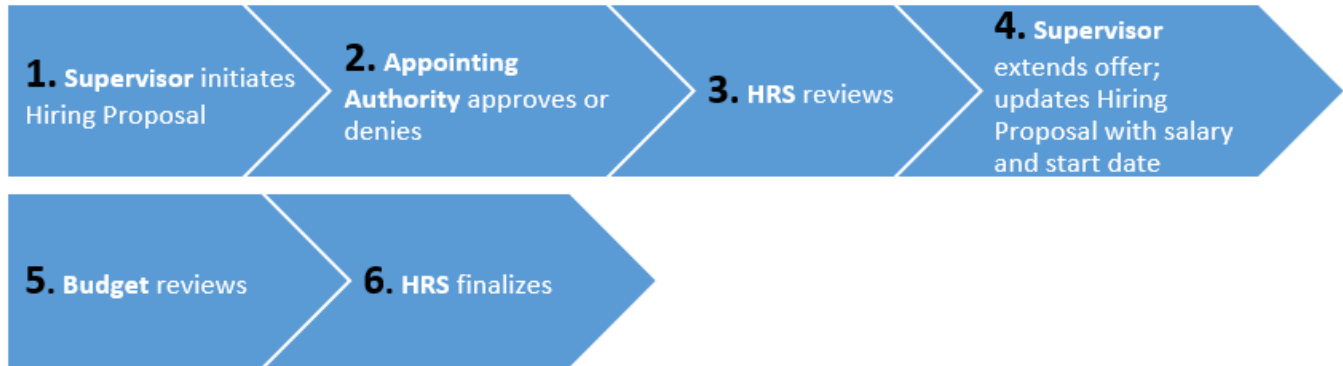
7. Optionally (and at any time) run the **Staff New Hire Information** report from the **Reports** tab.
8. Move the Hiring Proposal on to HRS: Hover over the **“Take Action on Hiring Proposal”** button and select **“Send to Human Resources (move to Offer Extended and Accepted).”** A comment option will appear. Comments will be included in the email that goes to the next user in the workflow; comments are optional.
9. Click **“Submit”** and the Hiring Proposal will move to the next step.

Step 8: HRS finalizes Hiring Proposal

HRS uses the system to finalize the Hiring Proposal, run required reports, generate the hire letter and EPAF, initiate the onboarding process, and make sure all applicants reach the correct workflow state to generate notifications.

B. Recruitments WITHOUT a background check

Workflow:



The six steps in this workflow are described in detail below.

Step 1: Supervisor initiates Hiring Proposal

The purpose of this step is to identify the finalist for the Appointing Authority who must approve or deny the selection. **Note:** *The Hiring Proposal is not used to get approval for salary amount or relocation compensation. Work with the HR point person and Appointing Authority on those details outside the system.*

1. Go to <https://my.evergreen.edu/>.
2. Click Hiring (Staff and Faculty).
3. Verify that you are in the “**Supervisor**” user group using the “**User Group**” drop down near the top right of the screen.
4. Click on the “**Postings**” tab and select “**Staff.**”
5. Click the Position Title (this takes you to the “**Summary**” tab of the Posting).
6. Go to the “**Applicants**” tab within the Posting.
7. Click on the **Last Name** of the person you want to hire.
8. Make sure the applicant is in the workflow state: “**Reference Checks Completed or Not Required, Recommended for Hire.**”
9. Near the upper right, click “**Start Staff Hiring Proposal.**”
10. Click “**Start Staff Hiring Proposal**” again.
11. Leave the fields blank (salary and start date are entered *after* an offer has been extended and accepted).
12. Click “**Next,**” wait for the page to load, and click “**Next**” again.
13. Hover over the “**Take Action on Hiring Proposal**” button and select “**Send to Appointing Authority.**” A comment option will appear. Comments will be included in the email that goes to the next user in the workflow; comments are optional.
14. Click “**Submit**” and the Hiring Proposal will move to the next step.

Note: *Plan to discuss compensation and start date outside of the system. The assigned HR staff person will send the Supervisor the salary range and tips to make the offer via email after the Hiring Proposal arrives in HRS (see step 3).*

Step 2: Appointing Authority approves or denies Hiring Proposal

Review the Pre-Offer Hiring Proposal created by the Supervisor. Plan to discuss compensation and start date outside of the system. HRS will send the salary range to the Supervisor once the Hiring Proposal arrives in HRS via the workflow (see step 3). **Important:** Relocation compensation must be approved in advance of the offer and in accordance with the Relocation Compensation policy posted at www.evergreen.edu/policies.

Appointing Authority approves or denies the Hiring Proposal:

1. Go to <https://my.evergreen.edu/>.

2. Click [Hiring \(Staff and Faculty\)](#).
3. Verify that you are in the “**Appointing Authority**” user group using the “**User Group**” drop down near the top right of the screen.
4. Click on the “**Hiring Proposals**” tab and select “**Staff.**”
5. Click the “**First Name**” of the finalist to open the Hiring Proposal.
6. Approve or deny to Hiring Proposal by hovering over the “**Take Action on Hiring Proposal**” button.
Approve = send to HR. **Deny** = Return to Supervisor. A comment option will appear. Comments will be included in the email that goes to the next user in the workflow; comments are optional.
7. Click “**Submit**” and the Hiring Proposal will move to the next step.

Step 3: HRS reviews Hiring Proposal

If the Appointing Authority approves the Hiring Proposal and moves it forward, HRS will review and, unless there are significant concerns, HRS will approve the Hiring Proposal on to the Supervisor. HRS will follow up with the Supervisor via email to provide the salary range that can be offered and advice on negotiating salary and start date.

Step 4: Supervisor extends offer; updates Hiring Proposal with salary and start date

Once the Hiring Proposal arrives back to the Supervisor, the offer is made outside of the system, then the Supervisor records the outcome of the offer in the Hiring Proposal by following these steps:

1. Go to <https://my.evergreen.edu/>.
2. Click [Hiring \(Staff and Faculty\)](#).
3. Verify that you are in the “**Supervisor**” user group using the “**User Group**” drop down near the top right of the screen.
4. Click on the “**Hiring Proposals**” tab and select “**Staff.**”
5. Click the “**First Name**” of the finalist to open the Hiring Proposal.

If the offer was declined:

6. Hover over the “**Take Action on Request**” button and select “**Send to Human Resources (move to Offer Extended and Declined)**” and contact HRS to discuss next steps.

If the offer was accepted:

6. Click “**Edit**” in the heading or next to **Hiring Proposal** in the **Summary** tab.
7. Use the **Monthly Salary Amount** field to enter the agreed upon amount.
8. Use the **Start Date** field to enter the agreed upon date.
9. If applicable, use the **Relocation Compensation** section to enter agreed upon details (**Important:** Relocation compensation must be approved in advance of the offer and in accordance with the Relocation Compensation policy posted at www.evergreen.edu/policies).
10. Click **Next**.
11. The **Next** button will take you to the section called **Hiring Proposal Documents**. There is no action required in this section, click **Next** and you will return to the **Summary** tab.
12. On the **Summary** tab, hover over the “**Take Action on Hiring Proposal**” button and select “**Send to Budget (move to Offer Extended and Accepted, Budget review).**” A comment option will appear. Comments will be included in the email that goes to the next user in the workflow; comments are optional.
13. Click “**Submit**” and the Hiring Proposal will move to the next step.
14. Collect and return all paper materials generated during the search, including interview notes to Human Resource Services.

Step 5: Budget reviews Hiring Proposal

The Hiring Proposal moves to the divisional Budget Coordinator for informational purposes. Budget should review the information and move the Hiring Proposal as quickly as possible so HRS can finalize the hire, including sending the hire letter and onboarding information to the new employee.

1. Go to <https://my.evergreen.edu/>.
2. Click Hiring (Staff and Faculty).
3. Verify that you are in the “**Budget**” user group using the “**User Group**” drop down near the top right of the screen.
4. Click on the “**Hiring Proposals**” tab and select “**Staff.**”
5. Click the “**First Name**” of the finalist to open the Hiring Proposal.
6. Review the information in the Hiring Proposal.
7. Optionally (and at any time) run the **Staff New Hire Information** report from the **Reports** tab.
8. Move the Hiring Proposal on to HRS: Hover over the “**Take Action on Hiring Proposal**” button and select “**Send to Human Resources (move to Offer Extended and Accepted)**.” A comment option will appear. Comments will be included in the email that goes to the next user in the workflow; comments are optional.
9. Click “**Submit**” and the Hiring Proposal will move to the next step.

Step 6: HRS finalizes Hiring Proposal

HRS uses the system to finalize the Hiring Proposal, run required reports, generate the hire letter and EPAF, initiate the onboarding process, and make sure all applicants reach the correct workflow state to generate notifications.