

MONTANA STATE UNIVERSITY PEOPLEADMIN ATS APPROVERS

This manual provides instruction on how to approve a job description in the **Position Management Module** and how to approve the Recruitment Authorization Form in the **Applicant Tracking System**.

LOGIN (all users)

- <https://jobs.montana.edu/hr>



User Name: NetID

Password: password associated with NetID

**Error message of "LDAP Credentials Failed" go to the ITC link and update you NetID password, for the network: <https://www3.montana.edu/myprofile/>*

NOTE: The online Applicant Tracking system (ATS) works best with Chrome, Firefox, or Safari (5 or higher). It is recommended that you utilize one of these Internet Options.

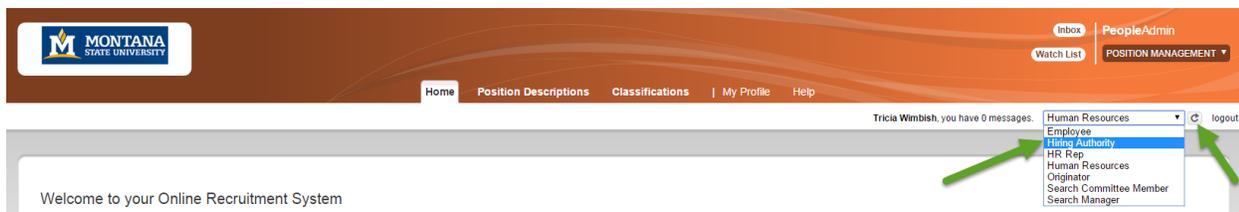
Inactivity of 60 minutes will time you out of the system and you will lose any unsaved data.

Clicking "Next" on any page will automatically save the page and move you to the next page. "Save" saves the current page without advancing to the next step.

POSITION MANAGEMENT – HIRING AUTHORITY



- When you log on, the background should be blue (Applicant Tracking System).
- Approvals here would include the RAF and Hiring Proposal.
- To move to Position Management to approve a position description, click the down arrow on the right side.
- Select Position Management (background will change to orange).



- Users may have several roles in the system, depending on their position with the University.
- If you are to approve a job description within Position Management, click the drop down arrow to the right of your name (if Hiring Authority is not in the box already).
- Select Hiring Authority.



- The green message bar indicates you are now viewing the system as a member of the Hiring Authority group.
- The box to the right of your name indicates which group you are logged into the system under.



- To view the position that is waiting for your review and/or approval, click the Position Descriptions tab.
- Select Staff Position Requests.

POSITION MANAGEMENT – HIRING AUTHORITY

Position Requests / Staff

Staff Position Requests

Open Saved Search Search: human resources office manager Search More search options

Heading Change 01-18-15 Saved Search: "Heading Change 01-18-15" (15 Items Found) Actions

| Working Title | Department | Position Number | Position Request Name | Position Request Workflow State | Created Date | (Actions) |
|-------------------------------------|---|-----------------|--|---------------------------------|---------------------------|-----------|
| Director of Operations | Associated Students of Montana State University (ASMSU) | | Modify Position Description: Director of Operations | Position Approved | May 29, 2014 at 03:38 PM | View |
| Pulse Crop Laboratory Diagnostician | Plant Sciences & Plant Pathology | 4C8879 | Modify Position Description: Pulse Crop Laboratory Diagnostician | Position Approved | May 29, 2014 at 01:22 PM | Actions |
| Cook III | Dining Halls - Miller | 4N1589 | Modify Position Description: Cook III | Position Approved | June 03, 2014 at 01:45 PM | Actions |

➤ Options to find the position:

- Enter the title in the search box and click Search or
- Click on the position title in the Working Title Column or
- Click on the Actions button for the position and click View

POSITION MANAGEMENT – HIRING AUTHORITY

- This is the summary of the position that needs review and/or approval. (Summary is shown in its entirety).
- To view, scroll down through the page.
- To edit, click the Edit option at the top

New Position Description: Human Resources Office Manager (Staff) [Edit](#)

Current Status: Draft
 Position Type: Staff
 Department: Training
 Created by: Tricia Wimbish
 Owner: Tricia Wimbish

Position Selection [Edit](#)

Position Information

| | |
|-------------------|--|
| NBAJOBS Title | Personnel Officer |
| NBAPOSN Title | Personnel Officer |
| FLSA | Contact HR for Determination |
| Union Affiliation | Exempt from Collective Bargaining |
| Min Salary | \$17,233 |
| Mid Salary | \$18,957 |
| Max Salary | \$20,680 |
| Core Duties | Conduct compensation, job analysis, and performance evaluation programs for the University. Includes classification of new and vacant positions, analysis of Title and compensation, oversight of the performance evaluation program, guidance for and decisions about flexible pay options use, and assistance with departmental and work unit reorganization. Provides back-up for the recruitment and payroll functions. May supervise other staff members. |

Position Justification [Edit](#)

Position Justification

| | |
|-----------------------|---|
| Justification of Need | Position is vacant due to the former Office Manager's retirement. Currently: blank |
|-----------------------|---|

Position Details [Edit](#)

Position Details

| | |
|-------------------------|--|
| NBAJOBS Title | Personnel Officer |
| NBAPOSN Title | Personnel Officer |
| FLSA | Contact HR for Determination |
| Union Affiliation | Exempt from Collective Bargaining |
| Min Salary | \$17,233 |
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| Max Salary | \$20,680 |
| Core Duties | Conduct compensation, job analysis, and performance evaluation programs for the University. Includes classification of new and vacant positions, analysis of Title and compensation, oversight of the performance evaluation program, guidance for and decisions about flexible pay options use, and assistance with departmental and work unit reorganization. Provides back-up for the recruitment and payroll functions. May supervise other staff members. |
| Working Title | Human Resources Office Manager Currently: blank |
| Brief Position Overview | Conduct compensation, job analysis, and performance evaluation programs for the University. Includes classification of new and vacant positions, analysis of Title and compensation, oversight of the performance evaluation program, guidance for and decisions about flexible pay options use, and assistance with departmental and work unit reorganization. Provides back-up for the recruitment and payroll functions. May supervise other staff members. Currently: blank |
| Appointment Type | Classified Currently: blank |

Currently: blank indicates this is a new position. For existing positions, if any of the fields were revised, the former information would be listed below as *Currently: Human Resources Associate*.

POSITION MANAGEMENT – HIRING AUTHORITY

| | |
|--|--|
| Position Number | 4M9999 Currently: blank |
| Current Employee | Vacant Currently: blank |
| Department | Training |
| Index No | 123456 Currently: blank |
| Org No | 123456 Currently: blank |
| Contract Term | Fiscal Year Currently: blank |
| Semester | |
| If other, specify From date | |
| If other, specify End date | |
| FTE | 1.0 Currently: blank |
| General Statement | Duties include: development, coordination, management, and participation in the Recruiting/HR/Payroll actions, details, and processes. Collaborate with Leadership Team on development of new procedures, policies, and training. Oversees and participates in the generation and submission of employee paperwork, addresses payroll compliance issues, manages the day-to-day and seasonal payroll procedures while remaining informed of changes to current policies; ensures employees are paid correctly using Banner forms (payroll corrections), reports from the web (HR/Payroll/Finance) and spreadsheets (hiring database and payroll spreadsheet); receives and provides necessary training. Supervises and participates in the processing of payroll documents, payroll changes; serves as proxy for web time entry process. Coordinates, manages, and processes recruiting questions and subsequent documents. Currently: blank |
| Duties and Responsibilities | <ul style="list-style-type: none"> • Serves as liaison between department and MSU Human Resources • Serves as the college point of contact for faculty and staff searches <ul style="list-style-type: none"> ◦ Coordinates initiation of search with required documents, ◦ In conjunction with MSU HR, conducts search committee orientations ◦ Coordinates with MSU HR with regards to the online application tracking system (ATS) ◦ Coordinates all aspects of interviews ◦ Completes search tasks and initiation of hiring documents • Serves as college point of contact for JumpStart, coordinating with HR/Payroll/Departments • Serves as college point of contact for Faculty on-boarding, coordinating with HR/Payroll/Departments • Manages and participates in the creation and tracking of departmental personnel and payroll paperwork, i.e. Contracts, EPAF, LOA, ONEPAYS, MOUs, etc. • Coordinates with HR/Payroll for the collection of required payroll documents, I-9's, W-4's and background checks, specifically for temporary employees not included in JumpStart • Responds to inquiries regarding the interpretation and application of HR related policies • Manages and maintains the new employee database • Administration of College's time entry process and serves as proxy for College web time entry process. • Maintains real-time spreadsheet of College payroll commitments by reconciling monthly to Banner, and provides summary to College accounting team • Manages payroll 1st calculation each month for College state and designated indexes, resolving problems by coordinating efforts with central Payroll technician • Manages and maintains annual budgeting for personnel services; i.e. salary planner • Manages the tracking of College benefits' allocations; maintain related required financial information for reporting purposes in coordination with Business Office • Manages electronic HR/Payroll files on Knox as well as hard copy personnel files • Supervises additional HR/Payroll staff – may include student workers, or staff, as assigned Currently: blank |
| Required Qualifications – Experience, Education, Knowledge & Skills | <ol style="list-style-type: none"> 1. Bachelor's degree in human resources or a related field plus two years of full-time (or part-time equivalent) progressively responsible experience in a fast-paced office setting with a human resources emphasis (i.e. – payroll, recruitment, talent management, employee/labor relations, etc. or customer service), or an equivalent combination of relevant education and experience. 2. Experience with record keeping practices and procedures with demonstrated excellent business math skills and familiarity with accounting policies and procedures. 3. Demonstrated experience interpreting, explaining, and applying policies and procedures, both verbally and in writing, with internal and external personnel. 4. Demonstrated managerial skills with the ability to process complex information and disseminate it to a level understood by all. 5. Demonstrated skill using personal computers and a variety of software including word processing, spreadsheet, email and management information system database as well as ability to learn new computer applications. Experience using Microsoft Office: Excel, Word, Outlook required. Ability to use pivot tables, and database software packages in order to track information and perform complex office functions. Please list software used and types of documents produced. 6. Experience with organizing and prioritizing large volumes of work, managing fixed deadlines and adapting to changing priorities in a high volume and demanding environment while maintaining a positive effective and professional approach. 7. Experience providing a high level of customer service to both internal team members and external customers while working positively, professionally and in a helpful manner. Currently: blank |

POSITION MANAGEMENT – HIRING AUTHORITY

| | |
|---|---|
| Preferred Qualifications – Experience, Education, Knowledge & Skills | <ol style="list-style-type: none"> 1. Experience working in an academic environment. 2. Experience with SCT Banner database system and MSU HR/Payroll and Finance applications. 3. Experience working with relational databases 4. Experience using mail merge. <p>Currently: blank</p> |
| The Successful Candidate Will | <ul style="list-style-type: none"> • Be knowledge of applicable state and federal laws, regulations and policies, as well as knowledge of state and MSU regulations and policies. • Have the ability to develop procedures and plans for benefits, payroll and personnel actions. • Have the ability to work with a wide variety of individuals, internal and external to the organization in a professional manner. • Have the ability to manage confidential information on a daily basis. • Have the ability to manage conflict and resolve difficult situations, professionally. • Have the ability to handle complex situations and apply strong analytical skills and sound judgment while maintaining a high level of attention to detail and accuracy. • Have the ability to establish and maintain effective working relationships with co-workers and the public. • Have the ability to Represent the College of EHD in a professional and courteous manner <p>Currently: blank</p> |
| Special Requirements | <p>In accordance with MSU policy, hiring will be conditional upon successful completion of a pre-employment background check.</p> <p>Currently: blank</p> |
| Physical Demands | <p>Work environment is normal office setting</p> <p>Currently: blank</p> |
| Originator | Tricia Wimbish |
| Hiring Authority | Tricia Wimbish |

Classification Tool

List essential functions (primary duties and responsibilities) of the position as well as the duties that the employee exercises independent authority, judgment, initiative and discretion. List any secondary duties assigned to this position

Supervisory Responsibilities

| | |
|--|---|
| Z-Org Position Reports To | Z6635A Currently: blank |
| Time Entry | Web Time Entry Currently: blank |
| This position has supervisory duties? | Yes Currently: blank |
| If Yes, list the number of FTE and PTEs this position supervises. | TBD – however, will supervise students and some departmental staff. Currently: blank |

LABOR DISTRIBUTION [Edit](#)

LABOR DISTRIBUTION

If Grant or ES/AES funded, MUST have appropriate approvals. VP/Provost approval confirms his/her approval for this non-faculty search if funded from General Fund 411201 – Indexes 40xxxx, 41xxxx, or 4 alpha xxxx (except W) - Totals must add up to 100%!

| | |
|---------------|----------------------------|
| Index | 123456 Currently: blank |
| Acct | 123456 Currently: blank |
| Dist % | 100% Currently: blank |

Internal Position Documents [Edit](#)

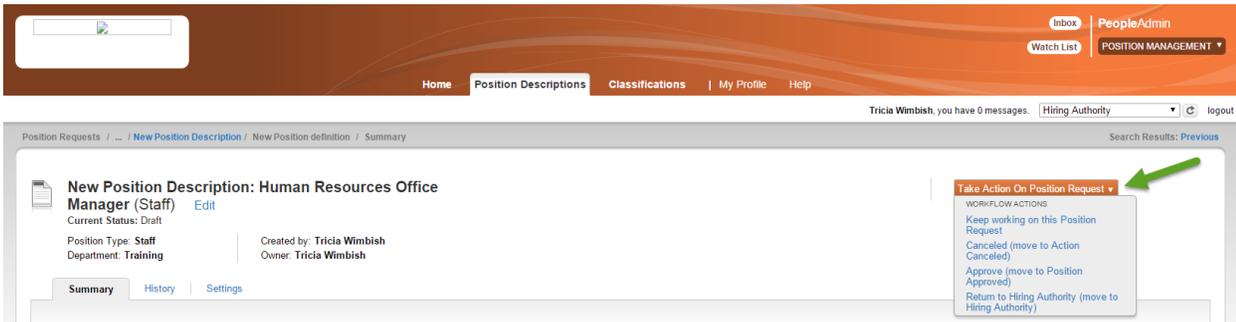
No documents have been attached.

Position Supervisor [Edit](#)

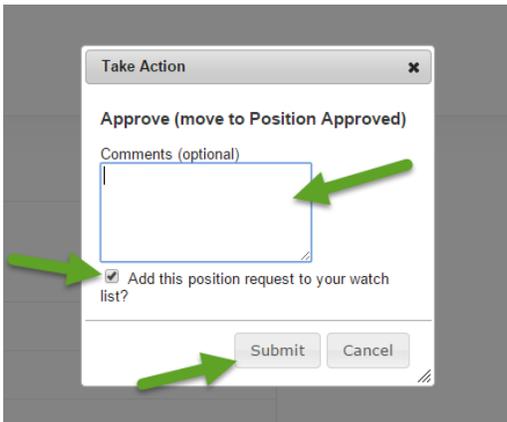
No supervisor position description specified.

POSITION MANAGEMENT – HIRING AUTHORITY

- Once reviewed, the following options are available.



- **Keep working on this Position Request** – allows the Hiring Authority to continue to edit the position.
 - **Canceled (move to Action Canceled)** – allows the Hiring Authority to cancel the position.
 - **Approve (move to Position Approved)** – allows the Hiring Authority to approve the position.
 - **Return to Hiring Authority (move to Hiring Authority)** – allow the Hiring Authority to move the position request to any additional Hiring Authorities (if applicable).
- To approve, select Approve (move to Position Approved).



- When the Take Action message box appears, add any comments (captures in the History tab).
- To add this position to your **Watch List** (for easy access to the position on your Home tab); click the box by “**Add this position request to your watch list?**”
- Click **Submit**.

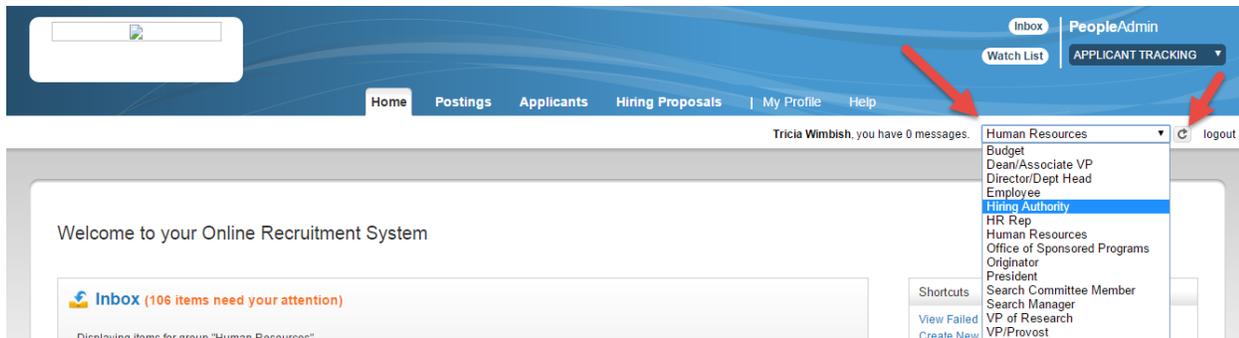


- The green message bar indicates this position was successfully transitioned and was added to your watch list.
- This position is now approved and is ready for HR to approve.

ATS – HIRING AUTHORITY, DIRECTOR/DEPARTMENT HEAD



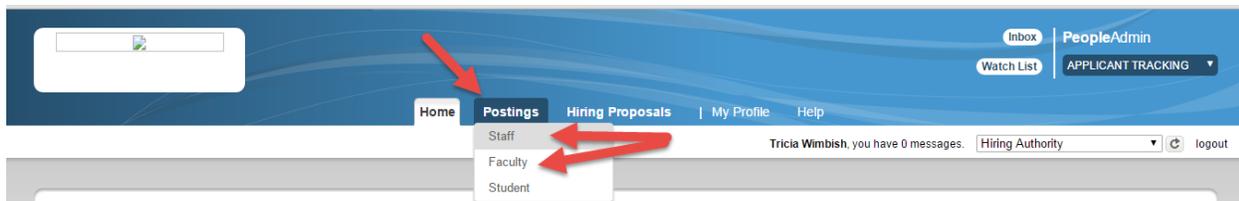
- When you log on, the background should be blue (Applicant Tracking System).



- Users may have several roles in the system, depending on their position with the University.
- If you are to approve the Recruitment Authorization Form (RAF), click the drop down arrow to the right of your name to select the Role that you need to approve as (Hiring Authority, Department Head, etc.)



- The green message bar indicates you are now viewing the system as a member of the selected group.
- The box to the right of your name indicates which group you are logged into the system under.



- Click on the **Postings** tab
- Select **Staff** for Classified and Professional positions
- Select **Faculty** for Tenured, Tenure-Track and Non-Tenure Track positions

ATS – HIRING AUTHORITY, DIRECTOR/DEPARTMENT HEAD

The screenshot displays the PeopleAdmin interface for a Hiring Authority. At the top, there are navigation tabs for Home, Postings, Hiring Proposals, My Profile, and Help. A search bar is present with the text "human resources office manager" and a "Search" button. Below the search bar, there is a table of staff postings. The table has columns for Working Title, Announcement Number, Department, Active Applications, Workflow State, and Last Updated. The first row is highlighted in yellow and has a black arrow pointing to the "Director of Operations" title. To the right of the table, there is an "Actions" button with a dropdown menu that includes "View Posting" and "View Applicants". A green arrow points to the "View Posting" option. Another green arrow points to the "Actions" button itself.

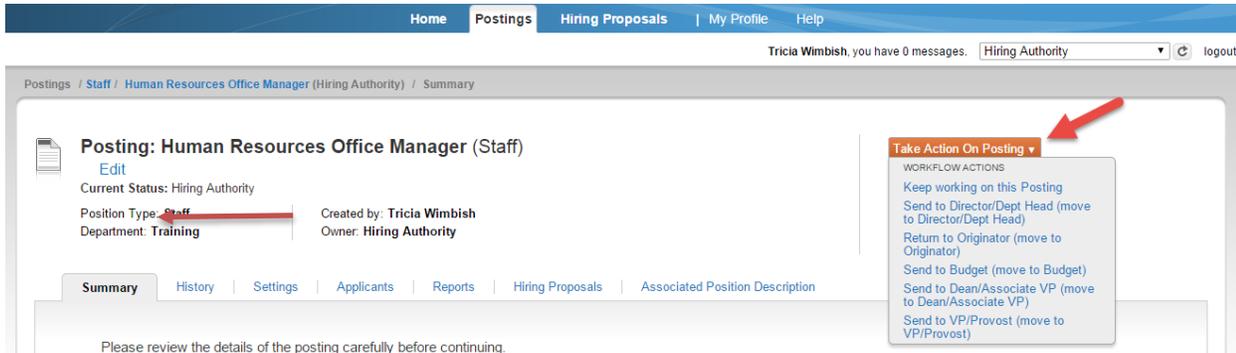
| Working Title | Announcement Number | Department | Active Applications | Workflow State | Last Updated | (Actions) |
|-------------------------------------|---------------------|---|---------------------|---------------------------------------|---------------------------|---------------------------------|
| Director of Operations | S00001P | Associated Students of Montana State University (ASMSU) | 13 | Auto Closed/Manually Removed from Web | July 11, 2014 11:00 AM | Actions |
| Pulse Crop Laboratory Diagnostician | 14-800 | Plant Sciences & Plant Pathology | 1 | Filled | October 02, 2014 10:00 PM | View Posting View Applicants |
| Benefits Associate II | STAFF - VA017001 | HR Operations | 1 | Auto Closed/Manually Removed from Web | August 06, 2014 10:00 AM | TRACKING Watch |

➤ Options to find the position:

- Enter the title in the search box and click **Search** or
- Click on the position title in the **Working Title** Column or
- Click on the **Actions** button for the position and click View

ATS – HIRING AUTHORITY, DIRECTOR/DEPARTMENT HEAD

- This is the summary of the position that needs review and/or approval. To view, scroll down through the page.
- To edit, click the **Edit** option at the top



- Once the Approver has reviewed and is ready to approve and move to the next step, click the Take Action On Posting drop down arrow and select the appropriate action:
 - Keep working on this Position Request – allows you add a note and to continue to edit the position.
 - Send to Director/Dept. Head (move to Director/Dept. Head) – sends the RAF to the Director/Dept. Head.
 - Return to Originator (move to Originator) – returns the RAF to the Originator for additional revisions.
 - Send to Budget (move to Budget) – sends the RAF to the Budget Office if they need to approve the position.
 - Send to Dean/Associate VP (move to Dean/Associate VP) – sends the RAF directly to the Dean/Associate VP (if the department/college does not have a Director/Dept. Head).
 - Send to VP/Provost (move to VP/Provost) – sends the RAF directly to the VP/Provost, if appropriate.
 - Human Resources (move to Human Resources - sends the RAF to the recruitment team, this can be used anytime through the approval process to get advice, but is also the final state before posting).

Same steps applies for all approvers to move a position/RAF forward for approval.

A screenshot of a 'Take Action' dialog box. The title bar is orange and says 'Take Action' with a close button. The main content area is white and contains the text 'Move directly to 'Human Resources'' and 'Comments (optional)'. Below the text is a text input field. At the bottom of the dialog box is a checkbox labeled 'Add this posting to your watch list?' and two buttons: 'Submit' and 'Cancel'.

- Please type **Approved** in the comments as a clear record of your approval. This will be time stamped and recorded by the system for later reporting.

HIRING PROPOSAL – HIRING AUTHORITY

- This is the summary of the Hiring Proposal that needs review and/or approval. (Summary is shown in its entirety).
- To view, scroll down through the page.
- To edit, click the Edit option at the top

The screenshot shows the PeopleAdmin interface for a hiring proposal. At the top, there is a navigation bar with 'MONTANA STATE UNIVERSITY' logo, 'Inbox', 'PeopleAdmin', 'Watch List', and 'APPLICANT TRACKING'. Below this is a secondary navigation bar with 'Home', 'Postings', 'Pools', 'Applicants', 'Hiring Proposals', 'My Profile', and 'Help'. A message notification says 'Ann Robinson, you have 2 messages.' and there is a 'logout' link.

The main content area shows the 'Hiring Proposal from PD: Cindy Elliott (Staff)' with an 'Edit' link highlighted by a red arrow. Below the title, it says 'Current Status: Hiring Authority'. There are buttons for 'Take Action On Hiring Proposal' and 'Print Preview'. The proposal details include:

- Position Type: Staff
- Department: Human Resources Services
- Applicant: Cindy Elliott
- Posting: HR - Administrative Assistant II
- Created by: Laura Underkofler
- Owner: Hiring Authority

Below the details are tabs for 'Summary', 'History', 'Settings', and 'Reports'. The 'Summary' tab is active, showing a 'Hiring Proposal' with an 'Edit' link. The summary is divided into two main sections: Applicant Information and Position Information.

Applicant Information

| | |
|----------------------|--------------------------|
| Legal First Name | Cindy |
| Middle Name | M. |
| Legal Last Name | Elliott |
| Preferred First Name | |
| Suffix | Ms. |
| Address1 | P.O. Box 999 |
| Address2 | |
| City | Gallatin Gateway |
| State | MT |
| Zip Code | 59730-999 |
| Country | United States of America |
| Primary Phone | 406-763-5555 |
| Secondary Phone | |
| Email | emailaddress@zed.zed |

Position Information

| | |
|---|--|
| NBAJOBS Title | Admin Assoc II |
| Classification Title | Admin Assoc II |
| FLSA | Non-Exempt |
| Union Affiliation | MPEA |
| Min Salary | \$10,200 |
| Mid Salary | \$11,100 |
| Max Salary | \$12,000 |
| Working Title | HR - Administrative Assistant II |
| Appointment Type | Classified |
| Position Number | 4M0691 |
| Salary | \$20,880.00 annually |
| FTE | 1.00 |
| Proposed Salary | \$23,000 |
| Approved Salary | |
| For Classified Position, Select Option Regarding Requested Rate | This rate is within the established entry-low to entry-high range for the title (please complete the "additional information" below) |
| Additional Information | <ul style="list-style-type: none"> Please list any recruitment and/or retention issues associated with this position. Please list departmental employees in same title and current wage. Please explain if this candidate will be offered a higher wage than any other employee in the department in this title, performing similar work. |

| | |
|----------------------------------|----------------------|
| Salary Rate Frequency | Hourly |
| Contract Term | Fiscal Year |
| Contract Type | Classified Salary |
| Semester | |
| If other, specify From date | |
| If other, specify End date | |
| Benefits Eligible (from posting) | Eligible |
| Hiring Authority | Catherine Hasenpflug |
| ORG (Historical) | 432300 |

Supervisory Responsibilities

| | |
|---------------------------|----------------|
| Z-Org Position Reports To | Z6635F |
| Time Entry | Web Time Entry |

Hiring Information

| | |
|---------------------------------|--|
| Hiring Proposal Number | STAFF - HP - 15135 |
| Search Summary/Hiring Rationale | The search committee invited 5 individuals to interview. Throughout the process, 4 individuals withdrew. Cindy Elliott is our remaining top candidate and has been selected for the position due to her knowledge, skills, and previous experience performing general office support tasks as a legal secretary as well as bookkeeper/office manager. She has demonstrated skill and experience in areas such as ordering supplies, filing, answering phones, scheduling meetings, as well as the ability to multitask in a busy environment. Ms. Elliott also has extensive bookkeeping/record keeping experience which will lend itself well to the wide variety of record-keeping tasks associated with the HR Admin Assoc II position (receiving and logging a wide variety of materials, accuracy of data entry is critical). Reference checks indicate Ms. Elliott would perform well in the HR front-desk environment and would be a good addition to our team. The committee agreed unanimously to offer Ms. Elliott the position. |
| Reference Name Called #1 | June Cleaver |
| Reference Name Called #2 | Bea Arther |
| Firm Start Date | 02/04/2015 |
| Issue Conditional Offer Letter | Yes |
| Offer Letter Information | Catherine Hasenpflug, Chief Human Resources Officer |

LABOR DISTRIBUTION

If Grant or ES/AES funded, MUST have appropriate approvals. VP/Provost approval confirms his/her approval for this non-faculty search if funded from General Fund 411201 – Indexes 40xxxx, 41xxxx, or 4 alpha xxxx (except W) - Totals must add up to 100%!

| | |
|--------|--------|
| Index | 4A2300 |
| Acct | 61125 |
| Dist % | 100 |
| ORG | 432300 |

[Hiring Proposal Documents](#) [Edit](#)

No documents have been attached.

PDF Documents

| Document Type | Actions |
|-------------------|--------------------------|
| Application | View |
| Combined Document | Generate |

HIRING PROPOSAL – HIRING AUTHORITY

The screenshot displays the PeopleAdmin interface for a hiring proposal. The top navigation bar includes 'Home', 'Postings', 'Hiring Proposals', 'My Profile', and 'Help'. A user notification for Tricia Wimbish is visible. The main content area shows the hiring proposal details for Samantha Savage, including 'Current Status: Hiring Authority', 'Position Type: Staff', 'Department: Training', 'Applicant: Samantha Savage', and 'Posting: Human Resources Office Manager'. A 'Take Action On Hiring Proposal' dropdown menu is open, showing workflow actions: 'Keep working on this Hiring Proposal', 'Return Hiring Proposal to Search Manager (move to Search Manager)', 'Send Hiring Proposal to HR Rep (move to HR Rep for Approval)', and 'Send Hiring Proposal to HR (move to HR For Approval)'. A red arrow points to the dropdown menu.

- Once the Hiring Authority has reviewed and is ready to approve and move to the next step, click the Take Action On Posting drop down arrow and select the appropriate action:
 - Keep working on this Hiring Proposal – allows the Hiring Authority to continue to edit the Hiring Proposal.
 - Return Hiring Proposal to Search Manager (move to Search Manager) – allows the Hiring Authority to return the Hiring Proposal to the Search Manager for additional revisions.
 - Send Hiring Proposal to HR Rep (move to HR Rep for Approval) – allows the Hiring Authority to send the Hiring Proposal to the departmental HR Rep (if applicable) for approval.
 - Send Hiring Proposal to HR (move to HR for Approval) – allows the Hiring Authority to send the Hiring Proposal to HR for approval.
- Once Human Resources approves the Hiring Proposal will move it to Extend Verbal Conditional Offer
- When candidate accepts move to HR Background check – HR will order background check
 - If your College has a departmental HR Rep select – HR Rep for Background Check
- HR for Offer Letter Assignment – HR will do the classified hire letter.
- Extend Final Offer – when the background is successfully completed and hire letter sent over.
- Offer Accepted by Applicant
 - This is a “terminal” state for a Hiring Proposal, no changes can be made, nor documents uploaded.

***LOA, LOH templates are created, please contact HR, if you would like a partially populated template for your letters of appointment or letters of hire. These will partially populate from the approved Hiring Proposal.