

State Classified Instructions & Process Guide Instructions:

Instructions:

The following workflows show the step-by-step instructions to process classified transactions. Specifically, the search process, appointment type 1 transactions, promotions (classified reallocations), and job description update-only reviews. The workflows have been color-coated to denote who is responsible for the action. Each section will provide instructions along with links to the website resources.

Additional Resources on each page may include:

Quick Tips: These boxes offer additional information for the user.

Note: Outline items to remember when submitting a transaction.

If you have questions about any of the guidance, please get in touch with your Classification or Talent Acquisition Consultant for further guidance.

Key:

Blue Boxes = HRBP Action Items/Instructions

Green Boxes = Classification Action Items/Instructions

Yellow Boxes = Talent Acquisition (TA) Action Items/Instructions

Grey Boxes = Specialist (Talent Acquisition or Classification) Action Items/Instructions

Purple Boxes = Compensation Action Items/Instructions

Classified Search Process Guide

Step 1: BP Enters Smartsheet Request: Business Partner (BP) enters a request using the Smartsheet Transaction Center. **Step-by-Step Instructions on how to complete a Search or Hire (Apt Type 1) can be found on the **Central HR website***

***Please select Search or Hire (Apt Type 1)** to complete the correct form.

Prior to submitting a request, please ensure:

- All required fields have been completed

AND

- The following documents have been attached: 2024 Combined PDQ & Job Ad template and 2nd level budget approval (*if applicable and using an existing position number*).
Refer to 2LA Quick Tip.

If using a brand new position number, 2LA will be secured after the Smartsheet submission.

- **Multiple Hires:** Multiple new position numbers can be created now so that 2LA (if applicable) can be obtained in advance of hire. Any new position number created will be added to the Smartsheet request and sent to the BP via email

Hyperlink will take you to Smartsheet Request Form:

<https://app.smartsheet.com/b/form/544a62c3d6a14020a5e72fceed78d89>

Step 2: Classification Evaluates PDQ & Updates HCM: Classification will review and formally classify the description. **Any corrections to the request will be made by the Classification Consultant directly in Smartsheet*

Classification will update Position Information (if applicable) or create a new position number. Once created new position numbers will be visible in Dynamic View and emailed to the HRBP. Classification will create a non-person profile (NPP) in HCM.

Step 3: BP Secures Budget Approval: If not applicable, please move to next steps.

For new position numbers, BPs can now submit a formal 2LA Budget Request, using the Classification e-mail as reference. Once approved, BP must forward 2LA approval e-mail to Classification.

Step 4: TA Approves Job Ad & NPP: Talent Acquisition (TA) will evaluate and approve the job advertisement and NPP. Talent Acquisition submits a request to post role in CU Careers. BP will receive notification of this step.

Step 5: Specialists Post Position: Talent Acquisition or Classification Specialist will post the position in CU Careers. Once posted, the BP will receive a “Now Posted” email.

Direct links will only be available for external postings.

Step 6: TA Initiates Search & Makes Referral: Using Recruitment or Full Service, Talent Acquisition will begin the Classified Search Process. This includes:

- Screening for Minimum and Preferred Qualifications
- Conducting Screening Interviews (if applicable)
- Determining the Eligible and Referral Lists (following all State Rules)

Talent Acquisition will manage candidate care and disposition/notify candidates in CU Careers throughout the search process, through the referral of finalists. Please reference our Candidate Care Step-by-Step Guide for more information - <https://www.cuanschutz.edu/offices/human-resources/hr-business-partners/hrbp-employee-categories-resources>

Step 7: BP Conducts Final Interviews & Identifies Finalist: Specific guidance on process and timelines will be provided to the BP via email throughout the search process.

BP will schedule and conduct final interviews with all referred candidates within the timeline outlined in the referral list.

BP will conduct reference checks using our online reference checking tool SkillSurvey or via phone/email. For questions, please contact hr.recruiting@cuanschutz.edu.

Prior to making any verbal offer, BP will need to complete a Pre-Offer Step #1

Hyperlink will take you to the Pre-Offer Step #1 Form:

<https://app.smartsheet.com/b/form/268a650e4ac0429fbadd560cb918a1ca>

To complete the submission form, BP will need the HR Transaction Center ID (ex. HR000000) provided when the Smartsheet Search was approved. Please contact your Talent Acquisition Consultant with any questions.

Step 8: TA Reviews & Routes Pre-Offer Step 1: Talent Acquisition (TA) will perform a Minimum Qualification review of the preferred hire, evaluate hire details and route Pre-Offer Step #1 to Compensation (Central or SOM) for approval.

Step 9: Comp Completes Equal Pay Analysis: Central HR or SOM Compensation will review the Pre-Offer Step #1 request and approve with an Equal Pay Rate or Range. BP will receive an approval email and may now extend a verbal offer to the finalist.

Step 10: BP Enters Pre-Offer Step #2: After a verbal offer is extended and accepted. BP will submit a Pre-Offer Step #2. *Please reference your Equal Pay approval notification for more instructions.*

To complete the Pre-Offer Step #2, BP will need to:

- Disposition/Notify candidates in CU Careers
- Create a Letter of Offer
- Submit a background check request (if applicable)

Hyperlink will take you to the Pre-Offer Step #2 Form:

<https://app.smartsheet.com/b/form/57f8a670e25f4568b3b4e04bf445532f>

Step 11: TA Approves Step #2 & Closes Search: HR will approve Step #2 and closes out search in CU Careers. *For Open-Rank Hires, TA will make any necessary Position Information updates.* BP will receive an approval email.

Step 12: BP Completes & Announces Hire: BP completes hire in HCM. Please reference the HCM Hiring an Employee Guide for more information: <https://www.cu.edu/docs/sbs-hiring-employee>

Once TBT is ready for approval, please forward the HCM notification to hr.recruiting@cuanschutz.edu

Within 30 days, BP will announce new hire, per University Equal Pay for Equal Work Guidance.

Step 13: Specialist Approves TBT: The Talent Acquisition or Classification Specialist will approve the Classified TBT transaction

Quick Tips:

- (1) HRBPs can track the progress of their request at any time using the Searches and Hires Dynamic View - <https://app.smartsheet.com/dynamicview/views/244c7990-2781-430e-9136-93ace9e082e0>
- (2) *For 610/611 funded positions, BP will secure 2nd level budget approval. Information on the budget approval process for each Campus, School, College, Department, etc. can be found here - <https://www.cuanschutz.edu/offices/bpcs/budget/second-level-approval>
- (3) The Anschutz campus is not currently using the offer function in CU Careers (Taleo). TAC Recruiter will deny offers entered into CU Careers. HRBP will continue to use the Smartsheet Pre-Offer Step #1 and #2 process (see details above).
- (4) HRBPs can track the progress of their Pre-Offer Step #1 request at any time using the Dynamic View - <https://app.smartsheet.com/dynamicview/views/01a46d49-a406-42d7-81ab-ebf553ec2c27>
- (5) HR Directors can track the progress of their Pre-Offer Step #1 request at any time using the Dynamic View - <https://app.smartsheet.com/dynamicview/views/751d23fb-83b3-4c06-937e-4bde2435535e>

SOM Only:

New Position Request Form (*used for Program Managers or above) -

<https://app.smartsheet.com/b/form/2ea0e1d4178f4e1d889ff0163ea84af1>

Classified Appointment Type (Repurpose an Eligible List) Process Guide

Step 1: Finalist Identified (References & Pre-Offer Step #1): After a finalist is identified, the BP will conduct reference checks using our online reference checking tool Crosschq or via phone/email. For questions, please contact hr.recruiting@cuanschutz.edu.

Prior to making any verbal offer, BP will submit a Pre-Offer Step #1 Request. Please make sure Appointment Type #1 is selected as the "Service Type" when submitting your Pre-Offer #1.

Hyperlink will take you to the Pre-Offer Step #1 Request Form:

<https://app.smartsheet.com/b/form/268a650e4ac0429fbadd560cb918a1ca>

To complete the submission form, BP will need the HR Transaction Center ID (ex. HR000000) provided when the initial Smartsheet Search was approved. Please contact your Talent Acquisition Consultant with any questions.

NOTE: If the individual will be hired into a brand new position number, the pre-offer step 1 should be submitted using the same position number as the CU Careers posting. The new position number will be created later and you will be notified via e-mail.

Step 2: TA Reviews & Routes Pre-Offer Step 1: Talent Acquisition (TA) will perform a Minimum Qualification review of the preferred hire, evaluate hire details and route Pre-Offer Step #1 to Compensation (Central or SOM) for approval.

Step 3: Comp Completes Equal Pay Analysis: Business Partner (BP) enters a request using the Smartsheet Transaction Center. **Step-by-Step Instructions on how to complete a Search or Hire (Apt Type 1) can be found on the **Central HR website***

***Please select Search or Hire (Apt Type 1)** to complete the correct form.

Prior to submitting a request, please ensure:

- All required fields have been completed

AND

- The following documents have been attached: 2024 Combined PDQ & Job Ad template, candidate's resume and 2nd level budget approval (*if applicable and using an existing position number*). **Refer to 2LA Quick Tip.**

If using a brand new position number, 2LA will be secured after the Smartsheet submission.

Hyperlink will take you to Smartsheet Request Form:

<https://app.smartsheet.com/b/form/544a62c3d6a14020a5e72fceed78d89>

Step 5: TA Reviews Request: Talent Acquisition (TA) will review the request and ensure the candidate is eligible for an Apt Type #1. **Any corrections to the request will be made by the Classification Consultant directly in Smartsheet*

Step 6: TA Reviews/Updates Position Information: Talent Acquisition (TA) will update Position Information (if applicable) or create a new position number. Once created new position numbers will be visible in Dynamic View and emailed to the HRBP.

Step 7: BP Secures Budget Approval: If not applicable, please move to next steps.

For new position numbers, BPs can now submit a formal 2LA Budget Request, using the TA e-mail as reference. Once approved, BP must forward 2LA approval e-mail to TA

Step 8: TA Enters NPP: Talent Acquisition (TA) will create and approve a non-person profile (NPP) in HCM. Attach the following documents: combined Job Description & Job Ad Template, candidates' resume and 2nd level budget approval (if applicable).

Step 9: BP Enters Pre-Offer Step #2: After a verbal offer is extended and accepted. BP will submit a Pre-Offer Step #2. *Please reference your Equal Pay approval notification for more instructions.*

Hyperlink will take you to the Pre-Offer Step #2 Request Form:

<https://app.smartsheet.com/b/form/57f8a670e25f4568b3b4e04bf445532f>

To complete the Pre-Offer Step #2, BP will need to:
Create a Classified Letter of Offer
Submit a background check request (if applicable)

NOTE: If using a new position number, the step 2 request will still include the position number of the CU Careers posting. The Draft Letter of Offer must include the new position number the finalist will be hired into.

Step 10: TA Approves Step #2: Talent Acquisition (TA) will approve Step #2. BP will receive an approval email.

Step 11: BP Completes & Announces Hire: BP completes hire in HCM. Please reference the HCM Hiring an Employee Guide for more information: <https://www.cu.edu/docs/sbs-hiring-employee>

Position number for new hire must match the Official Letter of Offer

Once TBT is ready for approval, please forward the HCM notification to hr.recruiting@cuanschutz.edu

Within 30 days, BP will announce new hire, per University Equal Pay for Equal Work Guidance.

Step 12: Specialist Approves TBT: The Talent Acquisition or Classification Specialist will approve the Classified TBT Transaction.

Quick Tips:

- (1) **Appointment Type #1** = Under Classified State Rule, an Appointment Type is an additional hire made by repurposing an eligibility list. A formal search must have been conducted in order to make an additional hire. **Eligibility list must still be active (within the 30 day window). Please contact your Talent Acquisition Consultant for more information.**
- (2) HRBPs can track the progress of their request at any time using the Searches and Hires Dynamic View - <https://app.smartsheet.com/dynamicview/views/244c7990-2781-430e-9136-93ace9e082e0>
- (3) *For 610/611 funded positions, BP will secure 2nd level budget approval. Information on the budget approval process for each Campus, School, College, Department, etc. can be found here - <https://www.cuanschutz.edu/offices/bpcs/budget/second-level-approval>
- (4) HRBPs can track the progress of their Pre-Offer Step #1 request at any time using the Dynamic View - <https://app.smartsheet.com/dynamicview/views/01a46d49-a406-42d7-81ab-ebf553ec2c27>
- (5) HR Directors can track the progress of their Pre-Offer Step #1 request at any time using the Dynamic View - <https://app.smartsheet.com/dynamicview/views/751d23fb-83b3-4c06-937e-4bde2435535e>
- (6) The Anschutz campus is not currently using the offer function in CU Careers (Taleo). TAC Recruiter will deny offers entered into CU Careers. HRBP will continue to use the Smartsheet Pre-Offer Step #1 and #2 process (see details above)

Classified Reallocation (Promotion) Process Guide

Step 1: BP Enters Smartsheet Request: Business Partner (BP) enters a request using the Smartsheet Transaction Center

<https://app.smartsheet.com/b/form/544a62c3d6a14020a5e72fceeecd78d89>

*Step-by-Step Instructions on how to complete a Salary Adjustment or Promotion can be found on the Central HR website. Please select Salary Adjustment or Promotion to complete the correct form.

Prior to submitting a request, please ensure: All required fields have been completed AND the following documents have been attached: Red-Lined PDQ and 2nd level budget approval (if applicable). Refer to 2LA Quick Tip.

- SOM ONLY: Please attached a copy of your SOM Natural Progression Promotion approval for all promotion requests

Step 2: Classification Evaluates Promotion Request: Classification will review request, panel (if necessary) and formally classify the updated PDQ.

**Any corrections to the request will be made by the Classification Consultant directly in Smartsheet*

Step 3: Classification Updates HCM: Classification will update Position Information (if applicable) and create/approve a non-person profile (NPP) in HCM.

Classification will notify the Specialist team that formal announcement can be posted in CU Careers

Per State of Colorado, Department of Personnel Rule, a formal announcement must be physically posted in a Dept Common Area and on the Internal CU Careers Job Site for a minimum of 5 days. The subject of the Classified Reallocation must apply to the posting within the 5-day window and meet all Minimum Qualifications of the role.

Step 4: Specialist Posts Reallocation: Talent Acquisition or Classification Specialist will post the reallocation notice on the Internal Job Board in CU Careers. Once posted, the BP will receive a "Now Posted" email. *Direct links are not available for internal only postings*

Step 5: BP Posts Reallocation Notice: BP posts the physical Reallocation Notice in a common area within Dept.

Step 6: Classification Monitors Announcement: Classification will monitor announcement, screen applicants, confirm the subject of the promotion is eligible for reallocation.

Classification will provide an update to BP once the 5-day posting window closes. **If more than one application is received, a comparative analysis process will be required.*

Step 7: Classification Routes Request to Comp: Using the original request submitted through the Transaction Center Classification will route this Classified Reallocation to Compensation for review/approval.

Step 8: Comp Completes Equal Pay Analysis: Central HR Compensation will review the request and approve with an Equal Pay Rate or Range.

BP will receive an update from Classification with the approved rate/range for the promotion and may now extend an offer to the employee.

Step 9: BP Creates Addendum Letter: Business Partner (BP) will draft an Addendum Letter of Offer and email a copy to the Classification Consultant.

Effective date must be at least one day after the Reallocation announcement closes.

Hyperlink will take you to the Letter of Offer Template Library:

<https://www.cuanschutz.edu/offices/human-resources/hr-business-partners/offer-letter-templates>

Step 10: Classification Approves Letter: Classification will review and approve the Addendum Letter of Offer via email.

Classification will notify BP if a criminal background check or sex offender registry check is required.

Hyperlink will take you to Background Check Request Form:

<https://app.smartsheet.com/b/form/adc3d96d9e12400a8993813e0371f25f>

Step 11: BP Enters Pay Rate Change: BP enters a Template Based Transaction (TBT) Pay Rate Change (Reason: Promotion). Please reference the HCM Pay Rate Change Guide for more information. *Follow steps specific to the promotion process.

Once the TBT Pay Rate Change is entered, please forward the HCM notification to hr.recruiting@cuanschutz.edu for approval.

Hyperlink will take you to HCM Pay Rate Change Step-by-Step Guide:

<https://www.cu.edu/docs/sbs-entering-job-changes-data-changes-and-pay-rate-changes>

Step 12: Specialist Approves TBT: The **Talent Acquisition or Classification Specialist** will approve the Classified TBT Transaction.

Step 13: BP Announces Promotion: Business Partner (BP) will announce promotion within 30 day window outlined by the University's Equal Pay for Equal Work Guidance -

https://www.cuanschutz.edu/docs/cuanschutzhumanresourceslibraries/talent-acquisition-and-compensation/equal-pay-for-equal-work-act---guidance-january-1-2024.pdf?sfvrsn=8809e4bb_1

Quick Tips:

(1) Employee will remain in the same position number, but will move to a new job code.

- (2) HRBPs can track the progress of their request at any time using the Salary Adjustment & Promotions Dynamic View - <https://app.smartsheet.com/dynamicview/views/39eeec6d-4267-4287-8c94-efb95455255b>
- (3) *For 610/611 funded positions, BP will secure 2nd level budget approval. Information on the budget approval process for each Campus, School, College, Department, etc. can be found here - <https://www.cuanschutz.edu/offices/bpcs/budget/second-level-approval>

SOM Only:

LINK to Natural Progression Promotion Request Form -

<https://app.smartsheet.com/b/form/e86017d029ce4e97bea6ebfa0e7d8dce>

Classified In-Range Adjustment Process Guide

Step 1: BP Enters Smartsheet Request: Business Partner (BP) enters a request using the Smartsheet Transaction Center. **Step-by-Step Instructions on how to complete a Salary Adjustment or Promotion can be found on the Central HR website.*

*Please select Salary Adjustment or Promotion to complete the correct form. Prior to submitting a request, please ensure:

- All required fields have been completed

AND

- The following documents have been attached: Red-Lined PDQ and 2nd level budget approval (*if applicable*). **Refer to 2LA Quick Tip.**

- **SOM ONLY:** Please attached a copy of your SOM Natural Progression Promotion approval for all promotion requests

Hyperlink will take you to Smartsheet Request Form:

<https://app.smartsheet.com/b/form/544a62c3d6a14020a5e72fceed78d89>

Step 2: Classification Evaluates In-Range Request: Classification will review request, confirm classification based on new duties. Once an evaluation is complete, Classification will forward the promotion to Compensation. **Any corrections to the request will be made by the Classification Consultant directly in Smartsheet.*

Step 3: Comp Completes Equal Pay Analysis: Central HR Compensation will review the request and approve with an Equal Pay Rate or Range.

BP will receive an update from Classification with the approved rate/range for the promotion and may now extend an offer to the employee.

Step 4: Classification Updates HCM: Classification will update Position Information (if applicable) and create/approve a non-person profile (NPP) in HCM.

Step 5: BP Creates Addendum Letter: Business Partner (BP) will draft an Addendum Letter of Offer and email a copy to the Classification Consultant.

Hyperlink will take you to the Letter of Offer Template Library:

<https://www.cuanschutz.edu/offices/human-resources/hr-business-partners/offer-letter-templates>

Step 6: Classification Approves Letter: Classification will review and approve the Addendum Letter of Offer via email.

Classification will notify BP if a criminal background check or sex offender registry check is required.

Hyperlink will take you to Background Check Request Form:

<https://app.smartsheet.com/b/form/adc3d96d9e12400a8993813e0371f25f>

Step 7: BP Enters Pay Rate Change: BP enters a Template Based Transaction (TBT) Pay Rate Change (Reason: Increase in Base Pay). Please reference the HCM Pay Rate Change Guide for more information. *Follow steps specific to the promotion process.

Once the TBT Pay Rate Change is entered, please forward the HCM notification to hr.recruiting@cuanschutz.edu for approval.

Hyperlink will take you to HCM Pay Rate Change Step-by-Step Guide:

<https://www.cu.edu/docs/sbs-entering-job-changes-data-changes-and-pay-rate-changes>

Step 8: Specialist Approves TBT: The Talent Acquisition or Classification Specialist will approve the Classified TBT Transaction.

Quick Tips:

- (1) Employee will remain in the same position number and job code.
- (2) HRBPs can track the progress of their request at any time using the Salary Adjustment & Promotions Dynamic View - <https://app.smartsheet.com/dynamicview/views/39eeec6d-4267-4287-8c94-efb95455255b>
- (3) *For 610/611 funded positions, BP will secure 2nd level budget approval. Information on the budget approval process for each Campus, School, College, Department, etc. can be found here - <https://www.cuanschutz.edu/offices/bpcs/budget/second-level-approval>

SOM Only:

LINK to Natural Progression Promotion Request Form -

<https://app.smartsheet.com/b/form/e86017d029ce4e97bea6ebfa0e7d8dce>

Classified Update Only Process Guide

Step 1: BP Enters Smartsheet Request: Business Partner (BP) enters a request using the Smartsheet Transaction Center. **Step-by-Step Instructions on how to complete a Salary Adjustment or Promotion can be found on the Central HR website.*

*Please select Update Job Description Only to complete the correct form. Prior to submitting a request, please ensure:

- All required fields have been completed

AND

- The following documents have been attached: Red-Lined PDQ

Hyperlink will take you to Smartsheet Request Form:

<https://app.smartsheet.com/b/form/544a62c3d6a14020a5e72fceed78d89>

Step 2: Classification Evaluates Description: Classification will review and formally classify the description. **Any corrections to the request will be made by the Classification Consultant directly in Smartsheet*

Step 3: Classification Updates HCM: Classification will update Position Information (if applicable) and create/approve a non-person profile (NPP) in HCM.

Quick Tips:

- (1) Employee will remain in current position number. No change in job code or compensation.
- (2) HRBPs can track the progress of their request at any time using the Update Only Dynamic View – <https://app.smartsheet.com/dynamicview/views/9dfde98a-a9a4-4f87-84be-edfad6f3de48>