University Staff
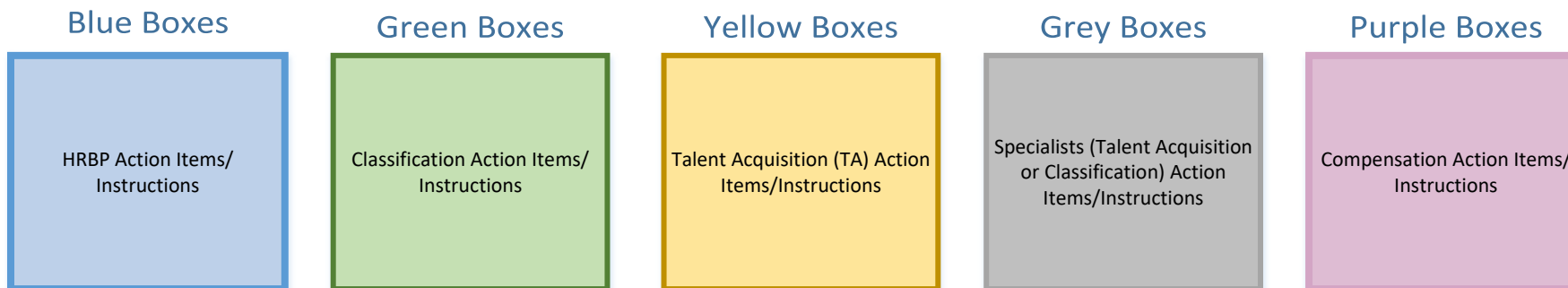# Instructions & Process Key

Instructions:

The following workflows show the step-by-step instructions to process university staff transactions. Specifically, the search process, appointment type 1 transactions, promotions, 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.

Blue Boxes	Green Boxes	Yellow Boxes	Grey Boxes	Purple Boxes
HRBP Action Items/ Instructions	Classification Action Items/ Instructions	Talent Acquisition (TA) Action Items/Instructions	Specialists (Talent Acquisition or Classification) Action Items/Instructions	Compensation Action Items/ Instructions

University Staff – Begin Search

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 Job Description & 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.**

- **SOM ONLY:** For new positions, at or above the Program Manager level SOM Approval should also be attached.

- **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 (**LINK**)*

Classification Evaluates JD & 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.

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.**

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

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.

Quick Tip:

HRBPs can track the progress of their request at any time using the Searches and Hires Dynamic View (**LINK**)

Quick Tip:

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 (**LINK**).

Finalist Identified

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 need to complete a Pre-Offer Step #1

*Hyperlink will take you to the Pre-Offer Step #1 Form (**LINK**)*

Search Starts

Please reference the Talent Acquisition Service Matrix for more information about Consulting, Full & Recruitment Services.

BP (or Talent Acquisition if Recruitment Services) will manage candidate care and disposition/notify candidates in CU Careers throughout the search process. **Please reference our Candidate Care Step-by-Step Guide for more information (LINK)**

SOM ONLY:

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

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:
Create a Search Matrix
Disposition/Notify candidates in CU Careers
Create a Letter of Offer (**LINK**)
Submit a background check request (if applicable)

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.

BP Completes & Announces Hire

BP completes hire in HCM.

Please reference the HCM Hiring an Employee Guide for more information (**LINK**)

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

TA Approves Step #2 & Closes Search

HR will approve Step #2 and closes out search in CU Careers

BP will receive an approval email.

Quick Tip:

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).

University Staff – Appointment Type 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 (LINK)

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.

Note:

Appointment Type #1 = search waiver based on previous search. If a search has not been run, a standard search process must occur before a candidate can be hired.

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.

Quick Tip:

HRBPs can track the progress of their request at any time using the Searches and Hires Dynamic View **(LINK)**

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 Job Description & 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.

- **SOM ONLY:** For new positions, at or above the Program Manager level SOM Approval should also be attached.

Hyperlink will take you to Smartsheet Request Form (LINK)

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 Talent Acquisition Consultant directly in Smartsheet

Quick Tip:

*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 **(LINK)**.

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.

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**

TA Enters NPP

Talent Acquisition (TA) will create and approve a non-person profile (NPP) in HCM. Attach the following documents: 2024 Combined Job Description & Job Ad Template, candidate's resume and 2nd level budget approval (if applicable)

Quick Tip:

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).

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 (LINK)

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

TA Approves Step #2

Talent Acquisition (TA) will approve Step #2.

BP will receive an approval email.

BP Completes & Announces Hire

BP completes hire in HCM. Position number for new hire must match the Official Letter of Offer

Please reference the HCM Hiring an Employee Guide for more information **(LINK)**

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

Univ Staff - Update w/ Increase (Promotion)

NOTE:

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

SOM ONLY:

(LINK) to Natural Progression Promotion Request Form

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 Job Description, employee's resume and 2nd level budget approval *(if applicable)*. **Refer to 2LA Quick Tip.**

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

Hyperlink will take you to Smartsheet Request Form (LINK)

Classification Evaluates Promotion Request

Classification will review request, formally classify the updated description.

Based on **University Equal Pay for Equal Work Guidance (LINK)** a competitive posting is no longer required.

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

Comp Completes Equal Pay Analysis

Central HR or SOM Compensation will review the Update w/ Increase or In-Range Promotion request and approve with an Equal Pay Rate or Range.

BP will receive an update from Classification with the approved rate/range. BP may now share the promotion details with the Supervisor/employee.

Classification Updates HCM

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

BP Secures Budget Approval

If not applicable, please move to next steps.

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

Quick Tip:

*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 (LINK).

BP Creates Addendum Letter

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

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 (LINK)

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. (LINK).

*Follow steps specific to the promotion process.

For most Departments, an Internal Approver will review and approve TBT Pay Rate Change. If you need support approving a TBT for a promotion, please contact hr.recruiting@cuanschutz.edu.

BP Announces Promotion

Business Partner (BP) will announce promotion within 30 day window outlined by the **University's Equal Pay for Equal Work Guidance (LINK)**

Quick Tip:

HRBPs can track the progress of their request at any time using the Salary Adjustment & Promotions Dynamic View (LINK)

Univ Staff - Update w/ Increase (In-Range Adjustment)

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 Job Description, employee's resume 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 (**LINK**)*

Quick Tip:

*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 (**LINK**).

NOTE:

Employee will remain in the same position number and job code.

Classification Evaluates Promotion Request

Classification will review request, formally classify the updated description, and confirm that a competitive posting is not required based on **University Equal Pay for Equal Work Guidance** (**LINK**)

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

SOM ONLY:

(**LINK**) to Natural Progression Promotion Request Form

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. (**LINK**).

*Follow steps specific to the promotion process.

For most Departments, an Internal Approver will review and approve TBT Pay Rate Change. If you need support approving a TBT for a promotion, please contact hr.recruiting@cuanschutz.edu.

Comp Completes Equal Pay Analysis

Central HR or SOM Compensation will review the Update w/ Increase or In-Range Promotion request and approve with an Equal Pay Rate or Range.

BP will receive an update from Classification with the approved rate/range. BP may now share the promotion details with the Supervisor/employee.

Classification Updates HCM

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

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 (**LINK**)*

BP Secures Budget Approval

If not applicable, please move to next steps.

For In-Range Adjustments, BPs can now submit a formal 2LA Budget Request, using the Comp approval e-mail as reference. **Once approved, BP must forward 2LA approval e-mail to Classification.**

BP Creates Addendum Letter

Business Partner (BP) will draft an Addendum Letter of Offer (**LINK**) and email a copy to the Classification Consultant.

Quick Tip:

HRBPs can track the progress of their request at any time using the Salary Adjustment & Promotions Dynamic View (**LINK**)

NOTE:

Employee will remain in current position number. No change in job code or compensation.

Quick Tip:

HRBPs can track the progress of their request at any time using the Update Only Dynamic View **(LINK)**

BP Enters Smartsheet Request

Business Partner (BP) enters a request using the Smartsheet Transaction Center.

Step-by-Step Instructions on how to complete a Update Only 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 Job Description

Hyperlink will take you to Smartsheet Request Form
(LINK)

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

Classification Updates HCM

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