Welcome to PageUp!

PageUp is a talent management system used across campus to manage position descriptions, recruitment requests, application review process, offer process and new employee onboarding process. All applicants apply for jobs through the PageUp system.

Human Resources supports and collaborates with departments to initiate, navigate, and successfully complete the hiring process. The implementation of PageUp has changed Western’s recruitment process. All recruitments are created, approved and posted in PageUp. This user manual is a tool to guide users through each stage of the recruitment process.
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About PageUp and the Home Page

PageUp Access

Sign in to PageUp using single sign on from myWestern. PageUp sessions last for one hour, if your session is idle for an hour or more you will need to login again.

myWestern -> Employee tab -> Technology Tools -> Western PageUp – Admin.

Access in the system is granted to users based on their role in the hiring process. For additional information or to change permissions contact Human Resources, Stephanie Norsby, Stephani.Norsby@wwu.edu or 360-650-3306 and / or complete the PageUp permissions Esign Form.

Getting Started

Depending on your permissions, the PageUp home page screen looks like this:

The home page displays bubble navigation, click the bubbles or hyperlinks to go to a particular form or task. Note: all blue text is a hyperlink. To start over or navigate to a different action or task it is recommended to start from the home screen, click ‘Home’ on the top menu. Many of the instructions in this user guide start from the home page.
**Popup Blockers**

PageUp can be accesses from most browsers, Chrome or IE 11 is preferred. Popup blockers must be turned off. To turn off the popup blocker follow these instructions:

Chrome:

1. On your computer, open Chrome.
2. At the top right, click More 📁.
3. Click Settings.
4. At the bottom, click Show advanced settings.
5. Under “Privacy,” click Content settings.
6. Under “Pop-ups,” select Manage Exceptions

Internet Explorer:

1. Select the Tools button (Looks like a gear), and then select Internet options.
2. Select the Privacy tab, then click on settings under the Pop-up Blocker section.
3. Type in the address of PageUp into the “Address of the website to allow” text box.
4. Click the add button and then close.

Visit the [HR Website](#) for additional browser specific popup blocker instructions.

**Menu Navigation**

Top left hand menu:

2. Jobs: view recruitments / jobs (depends on the level of permissions).
3. People: manage applications (depends on the level of permissions).
4. Reports: run reports and create custom reports (depends on the level of permissions).

Top right hand menu:
1. Recent items: click the down arrow to easily navigate back to something you were previously working on.

2. Print icon.

3. Username (Name): click the down arrow to edit your profile or logout of PageUp.

4. Hamburger icon, click the hamburger to expand the right hand side ‘Main Menu’.

The right hand side ‘Main Menu’ replicates many of the home page bubble navigation links and includes additional useful links.

---

**About Communication via PageUp**

Communication is easy in the PageUp system. Email templates are available which pull job related fields into the body of the email communication. There are two types of communications available in the PageUp system.
1. Internal communications which are used to communication to departments and hiring approvers.

2. External communication which are used to communicate with the applicants and new hire.

Some processes include both communication options. When processing forms and changing statuses pay close attention to the type of communication and the target recipient. Blank templates are available to ‘skip’ a communication component if desired.

**About Reporting in PageUp**

Data analytics and reporting is made easier with PageUp. Depending on access level reports are available to view and search open jobs, current recruitments, search committee comments, applicant outcomes, and much more.

1. Click ‘Reports’ on the top left menu.
2. Locate the report on the reports dashboard.
3. Click on the report title to run the report. Report hover icon options:
   a.  ✔️ - Edit Report / Change Filter (with permissions).
   b.  📄 - Export the report in .csv file.
   c.  📄 - Export the report in .xls spreadsheet.
   d.  ❤️ - Access the report or add to favorites.
4. Click ‘Save & View’ at the top right of your screen to run the report (clicking submit only saves the changes, does not run the report).
5. To export the report select the file format from the list.
6. Click export and PageUp will prepare the report for download.
7. Click ‘Download Report’ to download the report in the browser.

**About Position Descriptions (Classified, Professional, Permanent or Temporary Staff)**

Each classified, professional, permanent or temporary staff position must have a position description in the system. There are three (3) main reasons to complete or update a Position Description (PD):

1. **Recruitment**: An approved Position Description is required for all staff recruitments.
2. **Position Review**: Supervisor or employee may request a Staff Position Description review.

3. **Update**: Small changes including wording or immaterial changes to duties and/or responsibilities.

Note: The position description is **not** used for faculty or student positions.

Click [here](#) to view the Position Description Quick Reference Guide.

## How to Create a Position Description

Position descriptions are utilized for: staff recruitments, position reviews, and temporary staff hires. New position descriptions are created from the Position Description dashboard. Use the bubble navigation on the home page to get started.

1. Click the Position Description bubble or click ‘Manage position descriptions and create a new requisition’ next to the bubble.

2. Click the ‘New position description’ link on the top left.

   ![Position Description Form](image)

   The ‘POSITION DESCRIPTION INFORMATION’ page opens and is the input form. Complete all relevant fields, including required fields marked with an asterisk (*). The form is comprised of drop down lists, short and long text entry, date fields, radio buttons, check boxes, and dynamic search. See position description glossary for additional information about how to complete each field. See Position Description Form Fields for more information about each field.

3. Add Notes (optional), see Adding notes section for screen shots.
   a. Click the ‘Notes’ tab at the top of the form.
   b. Click the drop down arrow beside ‘Add’ and select ‘Note’.
   c. Type note in the add note window, click ‘Submit’.

4. Attach Documents (organization chart is required), see Attaching documents section for screen shots.
   a. Click ‘Documents’ tab at the top of the form.
   b. Select ‘Document from a file’.
   c. Click ‘Upload file’ to browse documents or files stored on your computer.
   d. Click ‘Save and add another’, ‘Save and close’ or ‘Close’.
5. Route Position Description for approval by following ‘To Submit a Position Description for Approval’ below.

Click [here](#) to view Approval Routings by Division or College.

**How to Complete Position Description Form Fields**

A worksheet is available from Human Resources to use a tool to create the position description outside of PageUp. This tool makes it easier to gather all necessary information ahead of data entry and to collaborate with others in your department.

To help with data entry, see color coded columns to see which fields are recommended / required for Classified, Prostaff and Students.

Note: for the Position Description section of the form, only use basic solid-circle bullets when copy and pasting lists into PageUp.

Below is a table that includes the form sections as well as the title of input labels and information about how to compete each input field.

<table>
<thead>
<tr>
<th>Label for Information Requested</th>
<th>Information about type of inputs and what is expected</th>
<th>Classified</th>
<th>Prostaff</th>
<th>Students</th>
</tr>
</thead>
<tbody>
<tr>
<td>Type of Action Requested</td>
<td>Select action that applies to the form</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Division/College</td>
<td>Division/college list PRIMARY responsibility for employee</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Department/Home Org</td>
<td>Select the department with primary administrative responsibility for employee. Appears in Banner screen PEAEMPL (“Home Department”) and as “Home Org” on Millennium Fast-HR reports</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Campus Location</td>
<td>Select the location where this position will work</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Advertising/Working Title</td>
<td>This is the Position Title</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Position Number</td>
<td>If this position description is being created for a new recruitment and you do not have a position number, leave blank. You can indicate the need for a new position number when submitting a recruitment request.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Supervisor</td>
<td>Search using the spyglass or type supervisor name.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Current/Previous Incumbent</td>
<td>Name of person currently or previously in the position.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Position Type</td>
<td>Select from drop down arrow.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>If Temporary or Project Specify End Date</td>
<td>Enter end date.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Appointment Percentage</td>
<td>Indicates how many hours employee is scheduled to work each week (e.g. 100% = 40 hrs./week; 50% = 20 hrs./week)</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
## Position Description Information

<table>
<thead>
<tr>
<th>Label for Information Requested</th>
<th>Information about type of inputs and what is expected</th>
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<th>Prostaff</th>
<th>Students</th>
</tr>
</thead>
<tbody>
<tr>
<td>If Position is Cyclic – specify how many months per year this position works</td>
<td>Enter number of months.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>For existing positions what are the significant changes since this position was last reviewed</td>
<td>Enter significant changes to the position description.</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Position Details

<table>
<thead>
<tr>
<th>Job Summary/Basic Function</th>
<th>List all the essential/marginal duties and the approximate % of time spent on each function over the course of a year below.</th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Job Duties</td>
<td>To add a job duty to the list click 'New'. Add Percentage of time, add the Duties / Responsibilities, and select from the drop down if the duties/responsibilities are essential or marginal. Once job duties are input and saved they may be modified by clicking the 'Edit' or removed by clicking remove. Note: click 'Add' to save any changes made to the job duties. If 'Add' is not clicked while the job duties is editable, it will not save the job duties. <strong>NOTE:</strong> You must save/add the job duties that are open before starting a new one, or the unadded job duties will be lost.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Required Qualifications</td>
<td>Add required qualifications</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Preferred Qualifications</td>
<td>Add preferred qualifications</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Special Requirements /Conditions of Employment</td>
<td>Add any special requirements or conditions of employment.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>If this position is considered essential personnel during suspended operations explain the duties and responsibilities that make this position essential</td>
<td>Enter essential duties and responsibilities information for this position.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Physical Demands</td>
<td>Select all physical demands that apply to essential functions.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Does this position perform hazardous tasks?</td>
<td>If you marked yes above, and this position performs hazardous tasks, the supervisor needs to ensure that a current hazard assessment of the department or shop's tasks is reviewed with the employee during onboarding. This will inform both the supervisor and employee of the proper personal protective equipment that needs to be issued before any hazardous tasks are</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
### Position Description Information

<table>
<thead>
<tr>
<th>Label for Information Requested</th>
<th>Information about type of inputs and what is expected</th>
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<th>Prostaff</th>
<th>Students</th>
</tr>
</thead>
<tbody>
<tr>
<td>performed. Questions? Please contact EHS at ext. 3064.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Position Supervisory/Budget Responsibilities

| What level of supervision does this position work under | Select from the drop down list. | | | |
| What is the highest level of the relationship between this position and the employee(s) it supervises | Select from the drop down list | | | |
| What type of employees does this position supervise? | Select all position types the position will supervise. | | | |
| If Position Supervises - List the positions and number of FTEs | Be sure to separate each position with either a semicolon, slash, or new line. To create a new line in the text field hold Shift and press Enter on your keyboard. | | | |
| Does this position have fiscal or budgetary responsibilities | Select from the drop down list | | | |
| If Yes, What is the total fiscal or budget responsibility amount | Enter amount in dollars | | | |
| Organization Chart | All Position Descriptions being submitted for review must have an attached Organization Chart. Follow the 'Attaching Additional Documents to the Position Description' instructions below to attach your specific chart to the Position Description. | | | |
| Employee Requested Position Reviews for Classified Staff | Add additional documents to this Position Description in the Documents tab above. A full Overview of the process and documents can be found on the [Classified Staff Classification and Compensation page](#). Additional forms you will need: [Employee Additional Form](#) [Supervisor Additional Form](#) | | | |

### Human Resources Use Only (skip this section)

Reference only section, HR completes these fields and this information can be viewed once the PD is approved.

### Users and Approvals

| Hiring Manager | Search using the spyglass or type hiring manager name. | | | |
| Director/Chair | Search using the spyglass or type Director/Chair name. | | | |
| Approval Process | Select from the drop down the approval process that matches the action requested for this position | | | |
**Position Description Information**

<table>
<thead>
<tr>
<th>Label for Information Requested</th>
<th>Information about type of inputs and what is expected</th>
</tr>
</thead>
<tbody>
<tr>
<td>Classified</td>
<td>Prostaff</td>
</tr>
<tr>
<td>Students</td>
<td></td>
</tr>
<tr>
<td>description. Once an approval is selected, you must fill in all the approvers in the fields that appear.</td>
<td></td>
</tr>
</tbody>
</table>

## How to Add Notes to the Position Description

Notes are optional. Additional information or notes can be added to the Position Description in the Notes Tab.

1. Click the Position Description bubble or click ‘Manage position descriptions and create a new requisition’ next to the bubble.
2. Locate the Position Description in the list and click ‘Edit’.
3. Add Notes (optional):
   a. Click the ‘Notes’ tab.
   b. Click the drop down arrow beside ‘Add’ and select ‘Note’.
   c. Type note in the add note window, click ‘Submit’ or ‘Submit & exit’.

4. Notes can be emailed to other Western employees by selecting the box ‘E-mail this note to’ and searching for a user email address:
How to Attach Documents to the Position Description

All Position Descriptions require an attached organization chart. Documents are added to the Position Description from the Documents Tab.

1. Click the Position Description bubble or click ‘Manage position descriptions and create a new requisition’ next to the bubble.
2. Locate the Position Description and click ‘Edit’.
3. Attach Documents (organization chart is required):
   a. Click ‘Documents’ tab at the top of the form.
   b. Select ‘Document from a file’.
   c. Click ‘Upload file’ to browse documents or files stored on your computer.
   d. Click ‘Save and add another’, ‘Save and close’ or ‘Close’.

How to Search or View Position Descriptions

From the Home page click the Position Description bubble or click on ‘Manage Position Descriptions and create a new requisition’ or click the hamburger icon to open the ‘Main Menu’ and select ‘Manage position descriptions and create a new requisition’.

Position Description dashboard:
The top section of the dashboard is a search tool; the lower section displays a list of current position descriptions.

1. Search for a Position Description:
   a. From the main page using several search criteria options. For example, you can search by the PD No (position number), Classification Title, Employee Name, and Department.

2. Recent Position Descriptions are presented in a table. The table can be sorted by clicking the individual column headers, one column at a time. Based on your permissions you can edit, view, and recruit from an approved Position Description.

3. Current status of the position description is located in the Position Description table column heading ‘Approval Status’.

How to Copy an Existing Position Description

When creating a new position description, copying an existing position description may save time. Especially if the position descriptions are similar.

1. Click the Position Description bubble.
2. Locate or Search for the position description to copy.
3. Click ‘View’.
4. Click ‘Copy Position Description’ from the top left corner, this creates another version of the same position description.

5. Complete all fields and route for approvals.

How to Edit or Update Position Descriptions

Position Descriptions are edited/updated at the request of a supervisor, employee or due to minor position description changes.

1. Click the Position Description bubble on from the Home page.
2. Locate the Position Description in the list of Position Descriptions.
3. Click ‘Edit’ to open the Position Description, at the bottom of the Position Description form there are three buttons: ‘Update PD’, ‘Edit’, and ‘Cancel’.
   a. ‘Update PD’: edits the Position Description and changes to a draft Position Description. Note: Once clicked, this cannot be undone, and the Position Description must go through an approval process.
      i. If this is a minor position description change select ‘Classified/Professional Staff PD Update Only’ for the approval process routing and click ‘Submit’ at the bottom of the form. This process is complete.
b. ‘Edit’: edit names of approvers that have not already approved the Position Description.

c. ‘Cancel’: cancels the approval process, a cancelation reason is required.

4. Route Position Description for approval (see How to Submit a Position Description for Approval).

How to Submit a Position Description for Approval

An approved position description is required for: conducting a staff recruitment, submitting a position review or hiring temporary staff.

1. If you are already on the Position Description form skip to step 5.
2. From the Home page, click the Position Description bubble.
3. Locate the Position Description in the list of Position Descriptions.
4. Click ‘Edit’.
5. Go to the Users and Approvals section at the bottom of the Position Description Form.
6. Add Hiring Manager and/or Director/Chair.
7. Select an ‘Approval process’ from the drop down list (by job type and action), add approver names and submit or save.
   a. ‘Submit’ sends the Position Description for approval.
   b. ‘Submit & exit’ sends the Position Description for approval and returns the user to the Position Descriptions menu.
   c. ‘Save a draft’ saves the Position Description (does not route for approvals).

5. Submit the Position Description for approval:
   a. ‘Submit’ sends the Position Description for approval, the current page remains open.
   b. ‘Submit & exit’ sends the Position Description for approval, return to the Position Descriptions menu.
c. ‘Save a draft’ saves the Position Description except for the approval routing. Select this option to save and return later to make changes before sending the Position Description for approval.

![Save a draft button](image)

**Note:** A Highlighted blue line appears at the top of the preview of the Position Description verifying it has been saved. Example:

![Highlighted blue line](image)

Users in the approval process will receive automatic email notifications with instructions indicating the Position Description is ready for review and approval. An email will be sent to the Hiring Manager and the Director/Chair when the Position Description is approved or declined.

6. Once submitted for approval, the Hiring Manager will have access to three buttons below the list of approvers, ‘Update PD’, ‘Edit’, and ‘Cancel’.

   a. ‘Update PD’ – Opens the Position Description for editing, Update PD changes the status back to draft. **Note:** Once clicked, this cannot be undone, the Position Description will go through an approval process to become approved.

   b. ‘Edit’ – Edit names of approvers that have not already approved the Position Description. For example, if someone is on vacation and has delegated someone as an interim approver.

   c. ‘Cancel’ – Cancels the approval process and requires inputting a reason for the cancelation.

7. Once a Position Description is approved, it is ready to recruit. Click ‘Recruit for position’ in the list of position descriptions on the main Position Description screen.

<table>
<thead>
<tr>
<th>Supervisor Name</th>
<th>Date Modified</th>
<th>Approval Status</th>
<th>Edit</th>
<th>View</th>
<th>Recruit for position</th>
<th>Archive</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>5 Jun 2017</td>
<td><strong>Approved</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

The Position Description status is located in the ‘Approval Status’ column in the position description dashboard. Once the position description is approved, recruitment can start. Click ‘Recruit for position’ to open the ‘RECRUITMENT REQUEST’ form and start the hiring recruitment/jobs process.

Click [here](https://example.com) to view Approval Routings by Division or College.
About Recruitments / Jobs

All hires and recruitments require the completion of a Recruitment Request within the PageUp system. Depending on the position type, the Recruitment Request can start in two ways:

1. Permanent and Temporary Classified or Professional Staff Positions: All staff positions must start with an approved Position Description. If you do not have a Position Description in the system go to the Position Description section of this guide.

2. Faculty/Student Positions: Faculty and Student position recruitment start by clicking ‘New Faculty/Student Job’ on the main Bubble Dashboard.

Click here to access the Recruitment Request Quick Reference Guide.

How to Start a Recruitment

Permanent and Temporary Classified and Professional Staff Positions

Begin on the ‘Manage position description and create a new requisition’ page.

1. Click the Position Description bubble or ‘Manage position descriptions and create a new requisition’ next to the bubble

2. Enter search criteria and click ‘search’ or locate the position description in the list of position descriptions
   a. Verify the position description status is approved (in the ‘Approval Status’ column)
   b. Click ‘View’ to view the position description

3. Click ‘Recruit for Position’ to start a Recruitment Request (must be approved status)

4. Go to Complete the Recruitment Request Form section of this guide

Faculty and Student Positions

Begin directly with a Recruitment Request.

1. Click ‘New Faculty/Student Job’ from the home screen next to the jobs bubble, or ‘New Job’ from the side ‘Main Menu’.

2. Complete the job template
   a. Use the drop down arrow to select the department or college
   b. Click the binoculars to search for the position
   c. Select Associated Student or Faculty template
   d. Click ‘Next >’ to start the Recruitment Request
3. Go to Complete the Recruitment Request Form section of this guide

**How to Complete the Recruitment Request Form**

The Recruitment Request form is the same for all employee types. See color coded columns for which fields are recommended / required for Classified, Prostaff and Students.

Fields on the Recruitment Request include position information, funding string information, security assessment questions, recruitment plan information, and more. Be sure to fill out all relevant information for the position including answering all required fields. Below is a table that includes the form sections as well as the title of input labels and information about how to complete each input field.

To help with data entry, see color coded columns to see which fields are recommended / required for Classified, Prostaff and Students.

<table>
<thead>
<tr>
<th><strong>Recruitment Request</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Label for Information Requested</strong></td>
</tr>
<tr>
<td>Division/College</td>
</tr>
<tr>
<td>Department/Home Org</td>
</tr>
<tr>
<td>Timesheet Org</td>
</tr>
<tr>
<td>Campus Location</td>
</tr>
<tr>
<td>Recruitment Number</td>
</tr>
</tbody>
</table>
# Recruitment Request

<table>
<thead>
<tr>
<th>Label for Information Requested</th>
<th>Information about type of inputs and what is expected</th>
<th>Classified</th>
<th>Prostaff</th>
<th>Students</th>
</tr>
</thead>
</table>

## POSITION INFORMATION

<table>
<thead>
<tr>
<th>Advertising/Working Title</th>
<th>This is the Position Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>Position Number</td>
<td>If this position description is being created for a new recruitment and you do not have a position number, leave blank. You can indicate the need for a new position number when submitting a recruitment request.</td>
</tr>
<tr>
<td>Position Type</td>
<td>Select from drop down arrow.</td>
</tr>
<tr>
<td>If Temporary or Project Specify End Date</td>
<td>Enter end date.</td>
</tr>
<tr>
<td>Appointment Percentage</td>
<td>Indicates how many hours employee is scheduled to work each week (e.g. 100% = 40 hrs/week; 50% = 20 hrs/week)</td>
</tr>
<tr>
<td>If Position is Cyclic or Faculty – specify how many months per year this position works</td>
<td>Enter number of months.</td>
</tr>
<tr>
<td>Is this employee expected to work more than 6 consecutive months AND work an average of 80 hours per month AND work at least 8 hours in each month?</td>
<td>Follow instructions for the drop down box.</td>
</tr>
<tr>
<td>Payroll Override Approver’s Western ID#</td>
<td>If applicable, Enter payroll override approver’s W#</td>
</tr>
</tbody>
</table>

## Position Purpose/Functions/Requirements

<table>
<thead>
<tr>
<th>Job Summary/Basic Function</th>
<th>List all the essential/marginal duties and the approximate % of time spent on each function over the course of a year below.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Job Duties</td>
<td>To add a job duty to the list click ‘New’. Add Percentage of time, add the Duties / Responsibilities, and select from the drop down if the duties/responsibilities are essential or marginal. Once job duties are input and saved they may be modified by clicking the 'Edit' or removed by clicking remove. Note: click 'Add' to save any changes made to the job duties. If 'Add' is not clicked while the job duties is editable, it will not save the job duties. NOTE: You must save/add the job duties that are open before starting a new one, or the unadded job duties will be lost.</td>
</tr>
<tr>
<td>Required Qualifications</td>
<td>Add required qualifications</td>
</tr>
<tr>
<td>Preferred Qualifications</td>
<td>Add preferred qualifications</td>
</tr>
<tr>
<td>Special Requirements /Conditions of Employment</td>
<td>Add any special requirements or conditions of employment.</td>
</tr>
<tr>
<td>Label for Information Requested</td>
<td>Information about type of inputs and what is expected</td>
</tr>
<tr>
<td>--------------------------------</td>
<td>------------------------------------------------------</td>
</tr>
<tr>
<td>Special Instructions to Applicants</td>
<td>Enter any special instructions for the applicants</td>
</tr>
</tbody>
</table>

**Funding Information**

- **Is the job split funded with 3 or more funding strings**: If you select yes, download the multi-funding string spreadsheet by clicking the link below your answer. Once this information is complete, follow the ‘Attaching Additional Documents to the Recruitment Request’ instructions below.

- **Funding Index One**: If you do not know your FAST index, leave blank.

- **FOAPAL One**: If you entered a FAST index above, enter only the account code. Otherwise, enter your Fund-Org-Account-Program-Activity (Optional)-Location (Optional) separated with a dash (-).

- **Funding Percentage One**: Only enter a number without the percent sign (%).

- **Funding Index Two**: If you do not know your index, leave blank.

- **FOAPAL Two**: If you entered a FAST index above, enter only the account code. Otherwise, enter an index enter your Fund-Org-Account-Program-Activity (Optional)-Location (Optional) separated with a dash (-).

- **Funding Percentage Two**: Only enter a number without the percent sign (%).

**Security Assessment**

- **Does this position involve any of the following?**: You must answer ‘Yes’ or ‘No’ to the following questions.

- **If you answered yes to any of the security Assessment questions, please explain**: Enter explanation in the text box

- **Explain any other responsibilities that may be deemed high risk to safety and security of the campus community or University resources**: Enter explanation in the text box

**Recruitment Plan**

- **Recruitment Process**: Select the recruitment process that matches the type of recruitment being done for the position.

- **Indicate the total number of positions you intend to hire. Input the number of ‘New’ and ‘Replacement’ positions then click the ‘Add’ button.**: Select the amount of positions required: New (additional headcount) or Replacement (back filling an existing employee). By default, there is one position open for the recruitment. If you know, your position number re-enter the number here, and indicate if this position will be a New or Replacement.

- **Search Committee Chair**: After entering the Search Committee Chair’s name, click the magnifying glass to the right of the field. If there is more than one person at Western with the same name, a popup window will appear to select the correct person.
### Recruitment Request

<table>
<thead>
<tr>
<th>Label for Information Requested</th>
<th>Information about type of inputs and what is expected</th>
<th>Classified</th>
<th>Prostaff</th>
<th>Students</th>
</tr>
</thead>
<tbody>
<tr>
<td>Search Committee Members</td>
<td>Click ‘Add Search Committee Member’, a popup search window opens. All current employees will be available to search in this window. When selecting a committee member click ‘Add’ to the right of their name, and continue to search for members as necessary. If one of the search committee members is not a Western employee there is an option to ‘Add new search committee member’ at the bottom of the popup. Clicking this opens another popup window to enter information for this committee member. First Name, Last Name, Initials, and an E-mail address are required. When finished adding search committee members Click ‘Done’.</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

#### External Advertising

| Please indicate the additional sources where you will publicize the position to build a diverse applicant pool, including both paid advertising and other publicity via listservs and outreach to relevant organizations or institutions | Click all that apply. |          |          |          |
| Specifying Any ‘Other’ Sources        | Use text field to enter any other advertising sources.                                                               |             |          |          |

#### Advertisement Text

| Advertising summary                  | This headline paragraph shows on the Western Jobs site. If you are unsure what to input in this section, Human Resources has provided a Recruitment Toolkit to help build this information. |             |          |          |
| Job Posting Summary                  | To create a Job Advertisement Table follow these steps:  
   - Click [here](#) to open a new window for the HTML text  
   - Copy the text below the line by highlighting everything, right clicking, and then clicking copy or hold down ‘ctrl+c’  
   - Go back to PageUp, in the advertisement text table format bar, click the sourcing code button [< >], right click and select paste or hold down ‘ctrl+v’  
   - After click ‘Done’ and the table will appear in the field.  
You will now need to fill out the advertisement table with relevant information. Some of the fields will have instruction information that can be deleted and replaced with actual position information. |             |          |          |

**Human Resources Use Only (skip this section)**

---

Page 21
Recruitment Request

<table>
<thead>
<tr>
<th>Label for Information Requested</th>
<th>Information about type of inputs and what is expected</th>
<th>Classified</th>
<th>Prostaff</th>
<th>Students</th>
</tr>
</thead>
</table>

Reference only section, HR completes these fields and this information can be viewed once the PD is approved.

<table>
<thead>
<tr>
<th>Users and Approvals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Search Coordinator</td>
</tr>
<tr>
<td>Supervisor</td>
</tr>
<tr>
<td>Hiring Manager</td>
</tr>
<tr>
<td>Director/Chair</td>
</tr>
<tr>
<td>Approval Process</td>
</tr>
</tbody>
</table>

How to Attach Documents to the Recruitment Request

Documents are added to the Recruitment Request on the Documents tab. If documents are not required skip to Submitting the Recruitment Request for Approval section below.

Examples of documentation: position with multiple funding strings or positions that requires an EHS Hazard Assessment.

1. To access the documents tab, click the Documents tab at the top of the Position Description, or click ‘Next Page’ from the Notes tab.

2. Attach documents by choosing one of the following options from the drop down list:
   a. ‘Document from File’ – documents or files stored on your computer, browse by clicking Upload file.
   b. ‘Document from Library’ – These are documents that are stored within PageUp
How to Submit the Recruitment Request for Approval

When completing a Recruitment Request the proper approval process must be selected under the ‘Users and Approvals’ section. Once all the correct approvers are entered into the workflow, submit the Recruitment Request for approval.

1. Click ‘Jobs open’, next to the Jobs bubble on the home page, to navigate to the ‘My Jobs’ page. This page lists all jobs where you are the ‘Hiring Manager’.
2. Locate the recruitment in the list of jobs.
3. Click ‘View’.
4. Go to the ‘Users and Approvers’ section of the Recruitment Request form.
5. Add Hiring Manager and/or Director/Chair.
6. Select an ‘Approval process’ from the drop down list (by job type and action). Note the approval process chosen should include a space for all approvers. Example: Director or Chair, Dean and VP is three approvers.
7. In the approval blank spaces add approver names.
8. Submit or save the form:
   a. ‘Submit’ sends the Position Description for approval
   b. ‘Submit & exit’ sends the Position Description for approval and the user returns to the Position Descriptions menu
   c. ‘Save a draft’ saves the Position Description (does not route for approvals)

Click [here](#) to view Approval Routings by Division or College.

How to View Recruitments

To view Recruitments that have already been started or submitted for approval:

1. Click ‘Jobs open’, next to the Jobs bubble on the home page. The Jobs page lists all jobs for which you are the ‘Hiring Manager’, or
2. Click ‘Manage Jobs’ from the side menu ‘Main Menu’ to view all recruitments you have permissions to see. By default, users will only see jobs from their department.

   a. At the ‘Manage Jobs’ screen you can search for positions based on several criteria, including but not limited to: Advertising/Working Title, Job No., and Department.
3. The recruitment status is listed on both ‘My Jobs’ and ‘Manage Jobs’ under the status column.
About Approvals

An email is sent to the approver indicating an approval is waiting for review and action. The email provides approval instructions. The ‘Manage approvals’ page lists all complete and pending approvals.

1. Click Approvals Bubble or a link beside the bubble to view the ‘Manage Approvals’ page.
   a. Approval Status: Click the drop down to sort approval history based on status: view all, pending or complete. Click search when you made a selection.
   b. Date raised is the status date.
   c. Job No is the number assigned to the job.
   d. Job title is the position or job title from the position description.
   e. Hiring Manager is the name of the hiring manager of the job.
   f. New indicates the number of new approvals, will be 1 if this is the first time you’ve seen it.
   g. Replacement indicates the number of replacements.

2. Click ‘View’ to open the document.

3. Review the document.

4. If the approval routing includes a shared email address click edit to change approvers.

Add person’s name or search:
5. Scroll down to bottom and take action in the Users and Approvals section.

Click [here](#) to view Approval Routings by Division or College.
About Advertisements

From the Home page, click the Advertisements bubble or click 'open advertisements’ to the right of the Advertisements bubble. The ‘My sourced jobs’ page displays advertising information for recruitments.

Column headings (Note each column heading can be sorted by clicking the title of the column):

- Requisition number: the job or recruitment number.
- Advertising/Working Title: the position title on the job announcement.
- Sourced to: name/place the job is advertised.
  - Website: Western job announcement.
- Opening date: the date the job is opened.
- Closing date: the date the job is closed.

Click ‘Preview job ad’ to view the job announcement (opens in a separate window).
About Search Committee Review

Search committee members can view all applicants and applicant materials in the PageUp system.

How to Add Search Committee Members to the Recruitment

Search committee members are added to the recruitment in the ‘Recruitment Request’ form, in the ‘Recruitment Plan Section’.

1. Click ‘Jobs’ from the home page.
2. Location job in the list.
3. Click View.
4. Scroll down to the ‘Recruitment Plan’ section of the form.
5. Click ‘Add Search Committee Member’, a popup search window opens.
   a. All current employees are available to search in this window.
   b. When selecting a committee member click ‘Add’ to the right of their name.
   c. If one of the search committee members is not a Western employee there is an option to ‘Add new search committee member’ at the bottom of the popup. Clicking this opens another popup window to enter information for this committee member. First Name, Last Name, Initials, and an E-mail address are required.
6. Continue to search and add members as necessary.
7. Click ‘Done’ when finished adding search committee members.

How Search Committee Members Review Candidates

From the Home page, click ‘jobs requiring search committee review’ next to the Search Committee Review bubble. Or search committee review can be accessed via the side ‘Main Menu’ by clicking the ‘Search committee review’ link. ‘My search committee jobs’ page displays job recruitment information.

1. Click view applicants to open the panel view:

   Panel view:
2. Click access button next to each applicant’s name.
   a. Click to prepare to download the resume.
   b. Click to open the application answers and present download links for attached documents such as the cover letter and resume.

If the search committee has decided to use preliminary review, follow the steps below. Otherwise follow the procedures set by the search committee lead.

1. Select the applicant by clicking their name (currently selected applicants are highlighted in blue).

2. Select one of the following outcomes:

   ![Outcome Selection]

3. Click ‘Save and next’ to move to the next applicant, or ‘Save and previous’ to go back to a previously selected applicant if you wish to go back and make changes.

4. Applicants are marked as ‘Reviewed’ once clicking save at the bottom of the form.
How to View Applications on a Specific Job

There are a few ways to view the applicants on a job. You can go to applicants from Manage Jobs menu or the People menu.

**Jobs**

1. Click ‘Jobs’ in the top left of the PageUp home page.
2. Locate the job in the list.
3. Click the job title to open the job.
4. Click ‘View Applications’ at the top left, just under the header bar.

**People**

1. Click ‘People’ in the top left of the PageUp home page.
2. Click the search tab on the left side, under the header bar.
4. Click ‘Search’.
5. View list of applicants per job and their current status.
6. **Note:** This page saves your search, so if you leave and come back it will show the applicants on the most recent position search.
How to Review Applicant Materials and Add Dispositions

Applicant materials are reviewed in the PageUp system. A disposition (a specific reason for non-selection) must be provided for each applicant not selected for an interview. For additional information see Manage Applicants and Request to Interview Quick Reference Guide.

1. From the PageUp home page, Click ‘Jobs’ on the top left menu.
2. Locate the job in the list, you can sort the list alphabetically by clicking on the column heading.
3. Click the job title.
4. Click ‘View applications’ in the top left, under the menu.
5. Locate the candidate in the list.
6. Click ‘View application’.
7. Scroll down and click ‘View’ to open resume and click ‘View’ to open cover letter:

<table>
<thead>
<tr>
<th>System</th>
<th>Information Technology Specialist 2</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Resume SweeneyResume2016_dr_v2.docx size 27kb</td>
</tr>
</tbody>
</table>

8. When finished reviewing materials close applicant window.
9. See below section for addition dispositions.

About Dispositions and Status Changes

The hiring manager, search chair, or search coordinator, for a recruitment manages the applicants’ status. Application statuses are used to indicate what step in the recruiting process an applicant is in and are used for the Request to Interview Process, Dispositions, and starting the Offer Details for approval. When applicants first submit an application, the application status is ‘New’. The search chair or search coordinator must move applicants to different statuses to move them through the recruitment process. A status change triggers communications, are used to begin the Request to Interview and Request to Offer processes, and initiate approvals.

Click here to view the Applicant Dispositions in Detail Quick Reference Guide.

To change an applicant’s status first start by viewing applications on a specific job.

1. From the PageUp home page, Click ‘Jobs’ on the top left menu.
2. Locate the job in the list, you can sort the list alphabetically by clicking on the column heading.
3. In the Applications column click the number (the number of applicants ie ‘17’).
4. Locate the applicant in the list.
   a. NOTE: Dispositions must be done individually per applicant (See ‘Dispositioning an Applicant’ below)
b. If you are moving more than one applicant to a new status you will use a one of the bulk actions described in ‘Bulk Moving Applicants’ below

5. To change the status of one applicant, click on the applicant’s current status, just left of the applicant’s name. The ‘Change application status’ window opens.

   ![Change application status window]

6. Select a status from the list.

7. Click ‘Next >’.

8. The ‘Confirm status change’ box the opens:
a. Depending on the status change, an email template will be set up already to go out to either the applicant or users/employees on the recruitment.

b. If you are unsure if an applicant should receive an email at this time follow the below grid for the 'to status':

<table>
<thead>
<tr>
<th>Communication to Applicant</th>
<th>NO</th>
</tr>
</thead>
<tbody>
<tr>
<td>Considered- Not Selected for position</td>
<td></td>
</tr>
<tr>
<td>Application Incomplete</td>
<td>Yes</td>
</tr>
<tr>
<td>Phone Screen</td>
<td>Yes</td>
</tr>
<tr>
<td>Request to Interview</td>
<td>NO</td>
</tr>
<tr>
<td>Interviewing</td>
<td>NO</td>
</tr>
<tr>
<td>Interview Event Booking</td>
<td>NO</td>
</tr>
<tr>
<td>Interview Event Accepted</td>
<td>NO</td>
</tr>
<tr>
<td>Interview Event Declined</td>
<td>NO</td>
</tr>
<tr>
<td>Reference Check</td>
<td>NO</td>
</tr>
<tr>
<td>Reference Check Unsuccessful</td>
<td>NO</td>
</tr>
<tr>
<td>Request to Offer</td>
<td>NO</td>
</tr>
<tr>
<td>Online Offer Made</td>
<td>Yes</td>
</tr>
</tbody>
</table>

c. For some status at the bottom of the status change form, update the job status from approved to screening (select yes). This helps HR and Department Heads keep track of the status of recruitments in the system.

9. Click ‘Move now’ and the applicant will be in the new status

How to Add Considered- Not selected for Position Disposition
When an applicant is not chosen for a position a disposition must be given for the applicant indicating why they were not chosen. The applicant status represents the candidate’s disposition.

1. From the PageUp home page, Click ‘Jobs’ on the top left menu.
2. Locate the job in the list, you can sort the list alphabetically by clicking on the column heading.
3. Click the job title.
4. Click ‘View applications’ in the top left, under the menu.
5. Locate the applicant in the list.
6. Click on the applicant’s current status to open the ‘Change application status’ window.
7. Select ‘Considered- Not selected for position’ status.
8. The ‘Confirm status change’ window opens with a second communication template and note section for the additional disposition reasons explanation.

9. Communication template: ‘-No template-’ is the default, no change necessary.
10. Select a reason the applicant has not been selected for the position from the drop down list.
11. In the ‘Notes’ add specific reason(s) for the status change.
12. Click ‘Move now’ to submit the disposition.

**How to Add Request to Interview Disposition**

Click [here](#) to view the Applicant Management and Request to Interview Quick Reference Guide.

When candidates have been selected for an interview, each applicant status must be updated to ‘Request to interview’ and routed to HR or EOO for approval.

1. From the PageUp home page, Click ‘Jobs’ on the top left menu.
2. Locate the job in the list, you can sort the list alphabetically by clicking on the column heading.
3. Click the job title.
4. Click ‘View applications’ in the top left, under the menu.
5. Select the applicants you want to interview by clicking the first box:

6. Select ‘Bulk move and send’ from the ‘Select a bulk action’ drop down just under the header bar:
7. The ‘Bulk move and send’ window opens.

8. Select the ‘Request to Interview (TO EOO/HR)’ communication in the first drop down (internal communication to notify approvers):

9. Email template opens with information needed for the Interview Request:
   a. The email includes many fields that are merged in fields e.g. {DEPARTMENT}.
   b. These fields will populate the information about the specific job for EOO and HR.
   c. At the top of the email is instruction on how to send this email:
      ```
      **ATTENTION HIRING DEPARTMENT**: For Classified Staff, enter Recruit.HR@wwu.edu in the ‘other email’ field above. For Professional Staff/Faculty, enter EOO@wwu.edu in the ‘other email’ field above. The email below will auto populate when the request is submitted.’
      ```
   d. Per instructions enter the ‘Other e-mail’ address.
   e. Add sender’s email address to the ‘From’ address.

10. Click ‘Next >’.

11. The window will automatically change to the ‘Bulk Move’ screen.

12. Select the application status ‘Request to Interview’:
13. Click ‘Next >’.

14. Communication template: ‘-No template-‘ (template provided for no communication to the applicant).

15. Select ‘No’ for E-mail Applicants.

16. Add notes if applicable.

17. Click ‘Move Now’, a pop up window displays the progress of the move.

18. Once the move is complete for all applicants the popup window closes.

19. Applicant statuses are now ‘Request to Interview’.

An email is sent to Human Resources or Equal Opportunity Office. EOO and HR will review the candidates and send an email back with a list of approved applicants. Once request to interview is approved by HR or EOO the applicants’ status is ‘Request to Interview Approved’.

**How to Change Applicant Status via the Applicant Card**

An individual applicant’s status can also be changed on the Applicant Card. The Applicant Card includes the applicant’s resume, cover letter, application answers, and status history.

1. Click ‘Jobs’ on the home page.

2. Located job in the list.

3. Click the ‘Job title’.

4. Click ‘View applications’ in the top left, under the menu.

5. Locate applicant in the list.

6. Click ‘View applicant’ on the right side of the applicant’s row, this opens the applicant card.
a. Alternatively, click on the applicant’s first or last name (they are hyperlinked).

7. Click on the status (e.g. ‘New’) under the Applications section of the applicant card and the ‘Change application status’ window will popup.

8. Follow the same steps as above to change the applicant’s status.

**How to Change Multiple Applicant Statuses all at Once: Bulk Move Applicants**

To move more than one applicant to a new status use a bulk action called ‘Bulk move’. This is similar to the ‘Bulk move and send’ explained in the ‘Request to Interview’ section above, except this action does not generate an email.

1. From the PageUp home page, Click ‘Jobs’ on the top left menu.
2. Locate the job in the list, you can sort the list alphabetically by clicking on the column heading.
3. Click the job title.
4. Click ‘View applications’ in the top left, under the menu.
5. Select the applicants you want to interview by clicking the first box:

6. Once you have selected all of the applicants’ whose statuses you want to change, select ‘Bulk move’ from the ‘Select a bulk action’ drop down box just under the header bar.

7. Select an application status from the drop down list.
8. Click ‘Next >’.
9. Click ‘Move Now’, a pop up window displays the progress of the move.

10. Once the move is complete for all applicants the popup window closes.
11. Applicant statuses are now updated.

**How to Add Request to Offer Disposition**

1. From the PageUp home page, Click ‘Jobs’ on the top left menu.
2. Locate the job in the list, you can sort the list alphabetically by clicking on the column heading.
3. Click the job title.
4. Click ‘View applications’ in the top left, under the menu.
5. Locate the applicant in the list.
6. Click on the applicant’s current status to open the ‘Change application status’ window.
7. Select ‘Request to Offer’.
8. Click ‘Next >’.
About Offers

0 - offers awaiting your approval
1 - new hires
0 - new hire tasks

Click here to view the Offer Quick Reference Guide.

How to Get Approval to Make an Offer

Once you have selected a candidate, begin the offer process by updating the applicant status:

1. From the PageUp home page, click ‘Jobs’ on the top left menu.
2. Locate the job in the list, you can sort the list alphabetically by clicking on the column heading.
3. Click the job title to open the job.
4. Click ‘View applications’.
5. Click on the application status (left of the applicant’s name).
6. Select ‘Request to Offer’ from the list.
7. Click ‘Next >’.
8. Click ‘Move now’ and the applicant status will be changed/updated.
9. Follow steps in below, How to Complete the Offer Details for Request to Offer.

How to Complete the Offer Details for Request to Offer

When a candidate is moved to the ‘Request to Offer’ Application Status the Offer details form opens. Many personal details, provided by applicant, and Job Details, from the Recruitment Request, are auto populated into the form by the system. Follow instructions below to attach the offer letter to the Offer details form.
Be sure to fill out all relevant information for the position including answering all required fields. Below is a table that includes the form sections as well as the title of input labels and information about how to complete each input field.

To help with data entry, see color coded columns to see which fields are recommended / required for Classified, Prostaff and Students.

<table>
<thead>
<tr>
<th>Offer Details</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Label for Information Requested</strong></td>
</tr>
<tr>
<td><strong>Positions:</strong></td>
</tr>
<tr>
<td>Position Number Suffix</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Position Details</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Has a Reference Check Been Completed?</strong></td>
</tr>
<tr>
<td><strong>Start Date</strong></td>
</tr>
<tr>
<td><strong>End Date for Project/Grant Funded/NTT Contract Positions</strong></td>
</tr>
<tr>
<td><strong>Appointment Percent</strong></td>
</tr>
<tr>
<td><strong>If Position is Cyclic or Faculty – Specify how</strong></td>
</tr>
</tbody>
</table>
## Offer Details

<table>
<thead>
<tr>
<th>Label for Information Requested</th>
<th>Information about type of inputs and what is expected</th>
<th>Classified</th>
<th>Prostaff</th>
<th>Students</th>
</tr>
</thead>
<tbody>
<tr>
<td>many months per year this position works</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Supervisor or Onboarding Coordinator</td>
<td>This person will have access to the Onboarding tasks and messaging available within PageUp.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Timesheet Org</td>
<td>Enter timesheet approval home orgn</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Campus Location

| Office Mail Stop (Search using MS####) | If you know the mail stop this position will work enter the Mail stop using MS#### and click the magnifying glass to the right of the field. If there is, more than one Building/Room for this mail stop a popup search window will open with options for the mail stop input. Select the correct Building/Room and click 'Okay' | | | |
| Office Phone Number | This is your new employee’s work number with area code. Please enter only using dashes for example: 360-650-1234 | | | |
| Office Phone Extension (if Applicable) | | | | |
| External Mailing Address | Only fill in the following information if the employee will be working in an office not on Western’s main campus. | | | |
| Street Address or PO Box | | | | |
| Building/Room | | | | |
| City | | | | |
| State | | | | |
| Zip | | | | |
| External Office Phone Number | If there is specific External Office Phone number that this position will use, enter the number with area code here. Use only dashes when entering the phone number, for example: 360-650-1234. | | | |
| External Office Phone Extension | | | | |
| Should this contact information be included in the staff directory | | | | |
| Moving Option | This drop down is for position offers that including moving expenses that will be paid for by the university. | | | |

### Salary Information

| Annual Salary | This is the annual salary you would like to offer the applicant. Human Resources will need to approve the salary before you make the offer. If the Salary does not match the salary indicated in the Pay Range/Pay Grade or Marketing Range in the Human Resources Section, you will need to indicate a reason to be reviewed in the Salary Notes. | | | |
| Hourly Pay Rate if not Annual Salary | If applicable, enter annual salary | | | |
## Offer Details

<table>
<thead>
<tr>
<th>Label for Information Requested</th>
<th>Information about type of inputs and what is expected</th>
<th>Classified</th>
<th>Prostaff</th>
<th>Students</th>
</tr>
</thead>
<tbody>
<tr>
<td>HR Final Approved Salary</td>
<td>This auto populates, skip</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Salary Notes</td>
<td>Add a note here if you would like to offer a salary that does not match the Pay Range/Pay Grade or Marketing Range in the Human Resources Section.</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
| Is the job split funded with 3 or more funding strings | If you select yes, download the multi-funding string spreadsheet by clicking the link below your answer. Once this information is complete, follow the 'Attaching a Document to the Offer Details' instructions below.  
NOTE: If your funding strings have changed since the recruitment request, upload a new spreadsheet on the Offer Details. |          |          |          |
| Funding Index One              | If you do not know your index, leave blank.           |            |          |          |
| FOAPAL One                     | If you entered an index, enter only your account number. If you did not enter an index enter your Fund-Org-Account-Program-Activity (Optional)-Location (Optional) separated with a dash (-). |          |          |          |
| Funding Percentage One         | Only enter a number without the percent sign (%).     |            |          |          |
| Funding Index Two              | If you do not know your index, leave blank.           |            |          |          |
| FOAPAL Two                     | If you entered an index, enter only your account number. If you did not enter an index enter your Fund-Org-Account-Program-Activity (Optional)-Location (Optional) separated with a dash (-). |          |          |          |
| Funding Percentage Two         | Only enter a number without the percent sign (%).     |            |          |          |
| Offer Signed By                | Input the person that signs the offer letter/contract. |            |          |          |

Reference only section, HR completes these fields and this information can be viewed once the PD is approved.

### Approval Process

<table>
<thead>
<tr>
<th>Originator</th>
<th>Originator’s name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Approval Process</td>
<td>Select the approval process that matches the action requested for this Recruitment Request. Once an approval is selected, you must fill in all the approvers in the fields that will appear. NOTE: if there are more approvers in the list than visible, a scroll bar will appear in the approver’s field.</td>
</tr>
</tbody>
</table>

Click [here](#) to view Approval Routings by Division or College.

### How to Prepare and Attach the Offer Letter

1. Create an offer letter scroll down to the ‘Offer Documents’ click ‘Merge Documents’:  

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2. Select the relevant offer letter from the list in the ‘Offer Letters’ folder, and click ‘Merge’.

3. The merged letter will be processed; if any information failed to merge, choose to retry or ignore if the field is not applicable to the offer. Examples of possible failed merge fields:

   a. OFFERENDDATE: Offer end date will be missing when hiring permanent employees

   b. OFFERSUPPLEMENTARY.TEST06: Cyclical will be missing if position is not cyclical

   c. AGREEMENTTYPETITLE: Bargaining unit

4. Once merged the offer letter is finished, Human Resources will review and complete the offer letter.

5. To download the document click ‘view’.

NOTE: Any document in the ‘Offer Letter’ folder is shared with the applicant when they receive the offer.

**How to Send an Offer to the Preferred Candidate**

Once the Offer has been approved, the offer can be sent to the new hire in the system.

1. It is highly recommended you call the applicant to let them know you would like to make an offer and negotiate a start date and a beginning salary.

2. Click ‘Jobs’ on the top left menu.

3. Locate the job in the list, you can sort the list alphabetically by clicking on the column heading.

4. Click the job title to open the job.
5. Click 'View applications'.
6. Click on the application status (left of the applicant’s name).
7. Select 'Online offer made'
8. Review and customize the email to the applicant
9. An offer email is sent to the applicant which provides instructions on how to view/accept their offer.

**How to Access Offer Details**

To see an offer that is in process or that has been approved, view the applicant’s profile.

1. Click ‘Jobs’ on the top left header menu.
2. Search job or click the job title from the list.
3. Click 'View Applicants' at the top left of the page, just under the header bar.
4. Locate the applicant and click the applicant’s name or click 'View application'.
5. In the Applications section, click 'Offer details' or 'No Offer'.
6. The offer card will open.
7. To add or update approvers, click ‘Edit’.
8. To make other changes follow the instructions below (How to Update an Offer).

**How to Update an Offer**

When the offer details change you need to update both the 'Offer details form' and the offer letter. To locate the 'Offer detail form' follow (Accessing the Offer Details) above. To update the offer letter see step 10 above (To Get Approval to Make an Offer).

1. To change the start date:
   a. Update 'Start Date' the 'Offer details form'.
   b. Update start date on the offer letter.
   c. Attach updated letter to the Offer details form.

2. To update salary (if salary is changed offer must be re-routed through approval):
   a. Update the 'Annual Salary $:' on the Offer details form.
   b. Update the salary offer letter.
   c. Attach updated letter to the Offer details form.
   d. Route for approvals.
About New Employee Onboarding

How to View Onboarding Tasks

Click [here](#) to view the Onboarding Quick Reference Guide.

Click the 'new hires' or 'new hire tasks' link next to the 'Offers bubble' to view new hires and new hire tasks.

1. Click 'view all tasks' to open the Hiring Manager view of the onboarding portal to:
   a. Add new tasks.
   b. View and Mark Manager Tasks as complete.
   c. Edit tasks.
   d. Notify the employee of new tasks/updates to their onboarding portal.
2. Or click 'new hire tasks' to view all tasks assigned to the hiring manager.

How to Add New Tasks

1. Find and select the task group to add the task to, for example 'First Week'.
2. Click 'Add New Task'.
3. Fill out the information on the 'New task' including 'Title', optional due date, and any additional content for the task.
4. Click 'Submit'.

How to View Tasks and Mark Manager Tasks Complete

The hiring manager's view of the onboarding portal has access to both employee and manager tasks.

1. Click 'new hire tasks'.
2. Click the Task name to view the content of a task.
   a. A tasks meant to be completed or reviewed by a manager has a different colored person next to the task title.
   b. Some tasks include both symbols, indicating both the employee and the manager must review/complete the task
c. The hiring manager tasks will also have a small green check box ✔️ to the right of the task, this indicates the task must be marked complete.

3. Once a task is complete, Open the task and click ‘Mark as completed’.

   a. When marked complete, the task is updated to include a completion date and time. The task is now shaded, this is a visual indication that the task is completed.

   b. Tasks not complete and ‘Overdue’ according to the due date are shaded in red.

### How to Edit Tasks

1. To edit a task, click ✔️ at the right side of the task.
2. Make desired edits to Task Content.

*Note: only edit task you have created.*

### How to Notify Employee of Task Updates

Task notification can be sent to applicants through the PageUp system.

1. Click ‘New hire tasks’ from the home page.
2. Click the 'Save and notify' drop down menu.

3. Select 'Notify {Applicant Name}’
4. Add the message. Default text is provided, edit the message as necessary.
5. Click 'Send'.

**How to View All Hiring Manager Tasks for Multiple Employees**

Multiple hires and onboarding tasks can be viewed in one place within PageUp.

1. On the home page click 'My new hire tasks' next to the 'Offer' bubble.
2. The list can be sorted by clicking on a column header.
3. Mark manager tasks complete by clicking the task title and clicking 'Mark as complete'.
4. To complete more than one task at once, click the check box of complete task and click 'Bulk Complete' in the top left of the screen under the header bar.
5. To view all tasks associated with an employee, click 'View all tasks'. 