Human Resource Services
Applicant Tracking System User Guide for Staff Recruitment (full version)
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INTRODUCTION

Login
(User Group: All)

Go to https://my.evergreen.edu/ and sign in using your Evergreen username and password
Click Hiring (Staff and Faculty)

Select Your User Group
(User Group: All)

Use the "**User Group**" drop down near the top right of the screen to select the correct user group for the task you are performing:

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

PHASE 1 – Posting Workflow

Create a Posting Request
(User Group: Initiator)

1. Go to https://my.evergreen.edu/
2. Click Hiring (Staff and Faculty)
3. Verify that you are in the "**Initiator**" user group using the "**User Group**" drop down near the top right of the screen
4. Click on the "**Postings**" tab and select "**Staff**"
5. Click "**Create New Posting**" and then "**Create from Position Type**"
6. Complete the required field(s) on this page and click "**Create New Posting**." ***Note***: *If you are the Initiator for only one unit, the Division, Department, and Unit fields on this screen will populate automatically. If you are the Initiator for multiple Departments and/or Units, you will need to select the Department/Unit that the position reports to. Selecting the wrong Department and/or Unit may result in email notifications going to the incorrect person when you submit the Posting to the workflow.*
7. Continue working through each section of the Posting form by completing the required fields and as many desired fields as you'd like, clicking "**Save and Continue**" on each page
8. When you reach the **Summary** tab, hover over the "**Take Action on Posting**" button and select the appropriate workflow action
9. When the take action dialog box appears, add comments (optional), and click "**Submit**"
10. An email is sent automatically to the Appointing Authority

The workflow for the Posting Request is: Initiator, Appointing Authority, Budget, College Budget Office, President/VP/Provost, HRS. HRS will work with the Supervisor of the position to get it posted after the Posting Request arrives in HRS. Check the status of the Posting Request any time by completing steps 1-4 above.

Review and Approve/Deny a Staff Posting
(User Group: Appointing Authority, Budget, College Budget Office, and President/Vice President/Provost)

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

2. Click Hiring (Staff and Faculty)
3. Verify that you are in the correct user group (Appointing Authority, Budget, College Budget Office, or President/Vice President/Provost) using the "**User Group**" drop down near the top right of the screen
4. In the "**Home**" tab under "**Inbox**" click on the Job Title (this takes you to the "**Summary**" tab of the Posting)
5. Review the posting details on the "**Summary**" tab

If changes are needed:
6. Select "**edit**" next to the section that needs changes
7. Make changes and click "**Save and Continue**" until you get to the "**Summary**" tab, or click on "**Summary**" in the left navigation menu
8. After all changes have been made, follow remaining steps to submit the Posting in the workflow

If no changes are needed:
9. From the "**Summary**" tab, hover over the "**Take Action on Posting**" button and select the appropriate workflow action
10. When the take action dialog box appears, add comments (optional), and click "**Submit**"
11. An email is sent automatically to the next user in the workflow

The workflow for the Posting Request is: Initiator, Appointing Authority, Budget, College Budget Office, President/VP/Provost, HRS. HRS will work with the Supervisor of the position to get it posted after the Posting Request arrives in HRS. Check the status of the Posting Request any time by completing steps 1-4 above.

PHASE 2 – Application Workflow

Evaluate Applicants
(User Group: Search Committee Member and Search Committee Chair)

The assigned HRS staff person will email each search committee member a PDF document with all of the application materials received from eligible applicants. Open the PDF, then use the steps below to evaluate each applicant.
1. Go to https://my.evergreen.edu/
2. Click Hiring (Staff and Faculty)
3. Verify that you are in the correct user group (Search Committee Member or Search Committee Chair) using the "**User Group**" drop down near the top right of the screen
4. Click on the "**Postings**" tab and select "**Staff**"
5. Click on the Position Title (this takes you to the "**Summary**" tab of the Posting)
6. Go to the "**Applicants**" tab within the Posting
7. Click on the **Last Name** of the applicant you want to evaluate
8. Click the "**Evaluate Applicant**" option to the right of the heading section and an adjustable box with an orange heading and the words *Evaluative Criteria* will open; complete each field
9. Click "**Save**" and you are done with that applicant or click "**Save and Next**" to move to the next applicant in the list automatically
10. To return to the list of applicants, click "**Applicant Review**" just above the applicant's name near the top of the page

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

6. Go to the "**Applicants**" tab within the Posting
7. Hover over the main "**Actions**" button and select "**Download Applicants Evaluations**"
8. Select "**Download active applicant evaluations**" from the options
9. The results will export to an Excel document

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

Move Applicants in the Workflow
(User Group: Search Committee Chair)

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

When to move applicants	Workflow State Options
After search committee review of applications	After review of applications, the Search Committee Chair should move applicants to one of these three workflow states: ○ *Reviewed, Approved for Interview* ○ *Reviewed, Not Approved for Interview* **Note**: Leave applicants in "*Review by Search Committee*" if they are not among the first group selected for an interview but **may** be contacted for an interview at a later time
After interviews	After interviews, the Search Committee Chair should move applicants to one of these three workflow states: ○ *Decline Interview* ○ *Interview Completed, Recommended for Reference Checks* ○ *Interview Completed, Not Recommended for Reference Checks*

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

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

Option 1 - Move one application at a time:
7. Click on the applicant's **Last Name**
8. Hover over the "**Take Action on Job Application**" button and select the appropriate workflow action.
9. Click "**Submit**"

10. Return to the list of Applicants on the Applicant Tab (***note***: *you may need to refresh the page to see the updated workflow state*)
11. Repeat these steps for each applicant you need to move or try a bulk move using the next set of steps

Option 2 - Move multiple applicants at a time (bulk move):
7. Check the boxes next to the applicants to be moved
8. Hover over the main "**Actions**" button and select "**Move in Workflow**"
9. Select the correct workflow step from the drop down menu next to each applicant (***note***: *if all of the applicants are currently in the same workflow state and they are all being moved to the same workflow state next, you can use the drop down menu above the list of applicants*)
10. Click "**Save changes**" (***note***: *you may need to refresh the page to see the updated workflow state*)

Access Position Description and Interview Questions
(User Group: Search Committee Member and Search Committee Chair)

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

Upload Post-Interview Strengths and Weaknesses Form
(User Group: Search Committee Chair)

Each applicant interviewed must have a **Post-Interview Strengths and Weaknesses Summary form** uploaded to their application by the Search Committee Chair. The forms should be completed in collaboration with the search committee members and be based on the information learned from the application materials and interviews.
1. Go to https://my.evergreen.edu/
2. Click Hiring (Staff and Faculty)
3. Verify that you are in the correct user group (Search Committee Chair) using the "**User Group**" drop down near the top right of the screen
4. Click on the "**Postings**" tab and select "**Staff**"
5. Click on the Position Title (this takes you to the "**Summary**" tab of the Posting)

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

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

9. In the "**Applicants**" tab, click on the **Last Name** of the applicant that you want to upload the document to
10. Click on the "**Supporting Documents**" tab
11. Click "**Add Document**," browse for the **Post Interview Strengths and Weaknesses Summary form** you created for that applicant, add a name and/or description (both are optional), and click "**Submit**"

Repeat these steps for each applicant interviewed

Recommend Applicants for Reference Checks
(User Group: Search Committee Chair)

After uploading the **Post-Interview Strengths and Weaknesses Summary form**, the Search Committee Chair moves interviewees to Recommended for Reference Checks or Not Recommended for Reference Checks.

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

Repeat these steps for each interviewee

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

Applicants moved by the Search Committee Chair to *Interviews Completed, Recommended for Reference Checks* will be sent a Reference Check Release form and a Declaration Regarding Sexual Misconduct form by HRS. Applicants who return the completed forms will be forwarded to the Supervisor for reference checking.

Review Post-Interview Strengths and Weaknesses Form(s)
(User Group: Supervisor)

Review the **Post-Interview Strengths and Weaknesses Summary form** uploaded to the applicant(s) recommended for reference checks.

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

Repeat these steps for each applicant recommended for reference checks

Conduct or Waive Reference Checks
(User Group: Supervisor)

Conduct Reference Checks

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

Before contacting references, access the blank Reference Checking form:

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

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

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

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

    Repeat these steps for each applicant you need to move
13. Start a Hiring Proposal for the person you want to hire using the instructions in **section A** or **B** of **Phase 3 – Hiring Workflow**

Waive Reference Checks

In consultation with the assigned HRS staff person, the Supervisor may opt to waive the reference checking step. If waiving reference checks, move the finalist to "**Reference Checks Completed or Not Required, Recommended for Hire**" and start a Hiring Proposal for the person you want to hire using the instructions in **section A** or **B** of **Phase 3 – Hiring Workflow**.

PHASE 3 – Hiring Workflow

Initiate and Process Hiring Proposals
(User Group: Supervisor, Appointing Authority, and Budget)

Introduction

Contact HRS to find out if a background check is required for the position

☐   **Yes**, a background check is required - go to section **A. Recruitments with a background check**

☐   **No**, a background check is not required - go to section **B. Recruitments without a background check**

A. Recruitments with a background check

Workflow:

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

Step 1: Supervisor initiates Hiring Proposal

The purpose of this step is for the Supervisor to identify the finalist for the Appointing Authority who must approve or deny the selection. Think of this step as the Pre-Offer Hiring Proposal.

1. Go to https://my.evergreen.edu/
2. Click Hiring (Staff and Faculty)
3. Verify that you are in the "**Supervisor**" user group using the "**User Group**" drop down near the top right of the screen
4. Click on the "**Postings**" tab and select "**Staff**"
5. Click the Position Title (this takes you to the "**Summary**" tab of the Posting)
6. Go to the "**Applicants**" tab within the Posting
7. Click on the **Last Name** of the person you want to hire
8. Make sure the applicant is in the workflow state: "**Reference Checks Completed or Not Required, Recommended for Hire**"
9. Near the upper right, click "**Start Staff Hiring Proposal**"
10. Click "**Start Staff Hiring Proposal**" again
11. Leave all of the fields blank; salary and start date are entered *after* an offer has been extended and accepted (see Step 6 below - ***note***: *the Hiring Proposal is not used to get approval for salary amount or relocation compensation; plan to discuss **compensation** and **start date** outside of the system*)
12. Click "**Save & Continue**," wait for the page to load, and click "**Save & Continue**" again

13. Hover over the "**Take Action on Hiring Proposal**" button and select "**Send to Appointing Authority**" and a comment option will appear; comments are optional and will be included in the email that goes to the next user in the workflow
14. Click "**Submit**" and the Hiring Proposal will move to the next step

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

Step 2: Appointing Authority approves or denies Hiring Proposal
Review the Pre-Offer Hiring Proposal created by the Supervisor. Plan to discuss compensation and start date with the Supervisor outside of the system; the assigned HRS staff person will send the Supervisor the salary range, information about relocation compensation, and tips to make the offer via email after the Hiring Proposal arrives in HRS (see step 3).

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

Step 3: HRS reviews Hiring Proposal
If the Appointing Authority approves the Pre-Offer Hiring Proposal and moves it forward, HRS will review and, unless there are significant concerns, HRS will approve the Hiring Proposal and send it to the Supervisor. HRS will follow up with the Supervisor via email to provide the salary range and advice on negotiating salary and start date and other offer details.

Step 4: Supervisor extends **conditional** offer; moves Hiring Proposal to HRS
Once the Supervisor receives the Hiring Proposal, the conditional offer is made outside of the system, then the Supervisor moves the Hiring Proposal to HRS, indicating if the conditional offer was accepted or declined.
1. Go to https://my.evergreen.edu/
2. Click Hiring (Staff and Faculty)
3. Verify that you are in the "**Supervisor**" user group using the "**User Group**" drop down near the top right of the screen
4. Click on the "**Hiring Proposals**" tab and select "**Staff**"
5. Click the "**First Name**" of the finalist to open the Hiring Proposal
If the conditional offer was declined:
6. Hover over the "**Take Action on Request**" button and select "**Send to Human Resources (move to Conditional Offer Extended and Declined)**" and a comment option will appear; comments are optional and will be included in the email that goes to the next user in the workflow
7. Click "**Submit**" and contact HRS to discuss next steps
If the conditional offer was accepted:

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

Step 5: HRS initiates the background check

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

Step 6: Supervisor confirms offer; updates Hiring Proposal

After the background check has been successfully completed, the Hiring Proposal goes to the Supervisor to confirm the offer (**salary**, **relocation compensation** (if applicable), and **start date**) with the finalist outside of the system, then the Supervisor records the outcome of the offer in the Hiring Proposal by following these steps:
1. Go to https://my.evergreen.edu/
2. Click Hiring (Staff and Faculty)
3. Verify that you are in the "**Supervisor**" user group using the "**User Group**" drop down near the top right of the screen
4. Click on the "**Hiring Proposals**" tab and select "**Staff**"
5. Click the "**First Name**" of the finalist to open the Hiring Proposal

It is possible that the finalist declines the position, even though they passed the background check. If that happens, complete this step:
6. Hover over the "**Take Action on Request**" button and select "**Send to Human Resources (move to Offer Extended and Declined)**" and contact HRS to discuss next steps

If the post-background check offer was accepted:
6. Click "**Edit**" in the heading or next to **Hiring Proposal** in the **Summary** tab
7. Use the **Monthly Salary Amount** field to enter the agreed upon amount
8. Use the **Start Date** field to enter the agreed upon date (*note: the start date should be agreed upon by both parties and should not change unless absolutely necessary after this step of the process*)
9. If applicable, use the **Relocation Compensation** field to enter agreed upon details (***Important**: Relocation compensation must be approved in advance of the offer and in accordance with the Relocation Compensation policy posted at www.evergreen.edu/policies*)
10. Click "**Save & Continue**" to move to the **Hiring Proposal Documents section**; no action is required in this section, click "**Save & Continue**" to return to the **Summary** tab
11. Hover over the "**Take Action on Hiring Proposal**" button and select "**Send to Budget (move to Offer Extended and Accepted, Budget review)**" and a comment option will appear; comments are optional and will be included in the email that goes to the next user in the workflow
12. Click "**Submit**" and the Hiring Proposal will move to the next step
13. Collect and return all paper materials generated during the search, including interview notes to HRS

Step 7: Budget reviews Hiring Proposal

The Hiring Proposal moves to the divisional Budget Coordinator for informational purposes. **Important**: Budget should review the information and move the Hiring Proposal as quickly as possible so HRS can finalize the hire, including sending the hire letter and onboarding information to the new employee and initiating the EPAF.
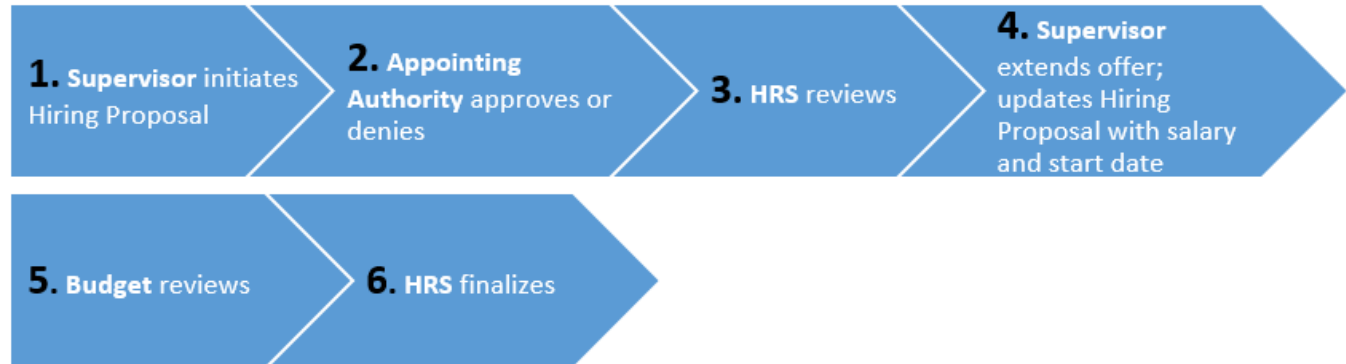1. Go to https://my.evergreen.edu/

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

Step 8: HRS finalizes Hiring Proposal

HRS uses the system to finalize the Hiring Proposal, run required reports, generate the hire letter and EPAF, initiate the onboarding process, and make sure all applicants reach the correct workflow state to generate notifications, including a regrets email to each applicant not interviewed.

B. Recruitments without a background check
Workflow:

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

Step 1: Supervisor initiates Hiring Proposal

The purpose of this step is for the Supervisor to identify the finalist for the Appointing Authority who must approve or deny the selection. Think of this step as the Pre-Offer Hiring Proposal.

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

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

Step 2: Appointing Authority approves or denies Hiring Proposal

Review the Pre-Offer Hiring Proposal created by the Supervisor. Plan to discuss compensation and start date with the Supervisor outside of the system; the assigned HRS staff person will send the Supervisor the salary range, information about relocation compensation, and tips to make the offer via email after the Hiring Proposal arrives in HRS (see step 3).

Appointing Authority approves or denies the Pre-Offer Hiring Proposal:

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

Step 3: HRS reviews Hiring Proposal

If the Appointing Authority approves the Pre-Offer Hiring Proposal and moves it forward, HRS will review and, unless there are significant concerns, HRS will approve the Hiring Proposal and send it to the Supervisor. HRS will follow up with the Supervisor via email to provide the salary range and advice on negotiating salary and start date and other offer details.

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

Once the Supervisor received the Hiring Proposal, the offer is made outside of the system, then the Supervisor moves the Hiring Proposal to HRS, indicating if the offer was accepted or declined.

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

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

If the offer was accepted:
6. Click "**Edit**" in the heading or next to **Hiring Proposal** in the **Summary** tab
7. Use the **Monthly Salary Amount** field to enter the agreed upon amount
8. Use the **Start Date** field to enter the agreed upon date (*note: the start date should be agreed upon by both parties and should not change unless absolutely necessary after this step of the process*)
9. If applicable, use the **Relocation Compensation** section to enter agreed upon details (***Important**: Relocation compensation must be approved in advance of the offer and in accordance with the Relocation Compensation policy posted at www.evergreen.edu/policies*)
10. Click "**Save & Continue**" to move to the **Hiring Proposal Documents section**; no action is required in this section, click "**Save & Continue**" to return to the **Summary** tab
11. Hover over the "**Take Action on Hiring Proposal**" button and select "**Send to Budget (move to Offer Extended and Accepted, Budget review)**" and a comment option will appear; comments are optional and will be included in the email that goes to the next user in the workflow
12. Click "**Submit**" and the Hiring Proposal will move to the next step
13. Collect and return all paper materials generated during the search, including interview notes to HRS

Step 5: Budget reviews Hiring Proposal

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

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

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

Step 6: HRS finalizes Hiring Proposal

HRS uses the system to finalize the Hiring Proposal, run required reports, generate the hire letter and EPAF, initiate the onboarding process, and make sure all applicants reach the correct workflow state to generate notifications, including a regrets email to each applicant not interviewed.