PeopleAdmin
User Guide
For Academic Searches

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EQUAL OPPORTUNITY PROCEDURAL CHECKLIST FOR USE WITH PEOPLEADMIN FOR ACADEMIC APPOINTEES

___1.  BEFORE ADS ARE PLACED, hiring unit (department, division, or regional campus) posts the vacant position in PeopleAdmin (https://indiana.peopleadmin.com/hr/).

REGIONAL CAMPUSES: If this is a faculty search (i.e., not a research associate or an academic specialist), please inform the Executive Associate Dean for Educational Affairs that the search process is beginning.

___2.  When posting has been approved by the IUPUI Office of Equal Opportunity (OEO), place ads and begin recruiting. The position will automatically be posted on the PeopleAdmin website.

___3.  Candidates will apply directly through PeopleAdmin.

___4.  Before inviting applicants for interviews, hiring unit uses PeopleAdmin to request approval of candidates selected for interviews and to provide reasons for the exclusion of other applicants from the interview request. Interviews may be scheduled as soon as the request is approved through PeopleAdmin. Please remember that a second review of protected class applicants may be requested by the OEO. Copies of all placed advertisements, letters, or any other efforts made to generate candidates must be maintained by the hiring unit for a minimum of two years from the time the position is filled—OEO reserves the right to randomly audit positions to be sure the required documents are on file.

___5.  Conduct interviews. A School of Medicine Dean’s Office interview is not required, but can be arranged if it would be helpful in the recruiting process. Please contact the Office Manager of the Dean’s Office (317-278-3048) for scheduling.

___6.  When ready to make an offer to the final candidate, submit the following as a single PDF via PeopleAdmin before the offer is made: (see http://faculty.medicine.iu.edu/recruitment/recruitment-resources/ for forms and templates)

   a.  If tenured or tenure track, “Approval of Terms of Academic Appointment for Tenured and Tenure Track Faculty” form and “Required Documentation for Tenured or Tenure Track Appointments” checklist.
   b.  If non-tenure track, “Approval of Terms of Academic Appointment for Non-Tenure Related Appointments” form and “Required Documentation for Non-Tenure Related Appointments” checklist.
   c.  Proposed offer letter to final candidate.*** (Must use template approved by Dean’s Office)
   d.  All other documentation listed on whichever checklist referenced in 6.a. or 6.b. is applicable to this appointment.

If the appointment is to be with tenure, remember to contact the Associate Vice Chancellor for Academic Affairs Office (317-274-8424) to arrange a meeting with the Associate Vice Chancellor or designee.

***DO NOT SEND THE OFFER LETTER to the candidate until approval is received via PeopleAdmin. Keep in mind that approval will require several days as the Dean’s Office and various offices in IUPUI Administration must each give approval. Offers for appointment with full tenure will require more time.
___7. Dean's Office gives authorization to department for issuance of offer letter.

___8. If offer is not accepted, update PeopleAdmin and repeat Step 6 if another offer is to be made.

___9. If offer is accepted, complete all appointment paperwork and submit it to the Dean's Office. (Contact Amy-Jeanne Sayre, 317-274-7214, for assistance.)

Office of the Dean (Academic Administration) 3/2017
INTRODUCTION

Welcome to the IU School of Medicine Faculty and Other Academics Applicant Tracking System. The Office of Faculty Affairs and Professional Development has implemented this system in order to automate the academic job posting, application, interview, and offer processes and approvals.

You will use this system to complete these tasks:

1) Create Postings
2) View Applicants
3) Request Interviews
4) Request Offers
5) Route Offer Paperwork

Throughout these processes, you will be able to communicate electronically with IUPUI and IUSM administrators, applicants, and others involved in your hiring process.

PeopleAdmin SelectSuite® supports the following browsers:

- Chrome (self-updating)
- Firefox versions currently supported by the vendor
- Internet Explorer version 9 and later
- Safari versions currently supported by the vendor

When an issue arises with a supported browser version, PeopleAdmin will consider fixing it in an upcoming release. Issues related to browser versions that are no longer supported will not be addressed.

The site also requires you to have Adobe Acrobat Reader installed. This is a free download available at www.Adobe.com.

Security of Applicant Data:

To ensure the security of the data provided by applicants, the system will automatically log you out after 60 minutes if it detects no activity. However, anytime you leave your computer we strongly recommend that you save any work in progress and log out of the system by clicking on the logout link located on the bottom left side of your screen.
GETTING STARTED

After entering the URL https://indiana.peopleadmin.com/hr/ the “login screen” for the system will appear and should be similar to the following screen:

You will need to click the single sign on option (circled at the top and bottom of the screenshot) to be routed through CAS authentication.

The Welcome Screen appears after you log in, and should appear similar to the following screen:

This page is a dashboard to help you keep track of actions and postings:

- Items in your Inbox require your attention.
- Items on your Watch List are things you have selected to keep an eye on during the approval process.
Creating a New Posting

On the home page, make sure to select “IUSM Initiator” from the “Current Group” drop down. Only IUSM Initiators can create new postings.

Click the “Create New School of Medicine Posting” under the home page’s shortcuts menu.

Entering Posting Information

You will be prompted to select from the following:

- Create from Position Type: this means create from scratch
- Create from Posting: this means create from a previous People Admin posting. Only postings previously created in People Admin will be available, so if this is your first time posting the job in People Admin, you will choose “Create from Position Type.”

TIP: Fields with an asterisk (*) are required, so if you do not include information in the field, an error message will appear and you will be required to complete it.
Once the posting type is selected, the New Posting page will appear. On this page you will input:

1) **Title** – you may use a descriptive title, but the School Approver may edit for clarity or accuracy.

2) **Department** – this is a drop down list in alpha order. If you are initiating for a division, each division is listed under the department (e.g. IUSM – Medicine – Cardiology). If you do not see the department you are trying to post for, contact IUSM Faculty Affairs to update your access.

3) **Applicant Workflow** – the default is to place applicants in the Application Received workflow. **If you would like to receive email notifications each time someone applies to the position, choose Application Received with Email from this drop down.**

   ![Applicant Workflow](image)

   Note: this will turn on notifications for all users with the IUSM Initiator role for your department. If you have initiators in your department that do not wish to receive these emails, they can opt out of them in the ‘Manage Emails’ section of their profile.

4) **References** – PeopleAdmin has the ability to manage the reference letter collection process. It is not required that units use PA to collect reference letters, and this section may be left blank if you prefer to collect references outside of PeopleAdmin.

   a. **Reference Notification** - Use this drop down to select a workflow state that will kick off the referencing process. Our suggestion is to use the *Request Reference Letters* workflow.

      A request will be sent to the applicant to supply information for references if they have not already done so, then requests for letters will be sent to those referees. The referees will then submit those letters via PeopleAdmin.

   b. **Recommendation Workflow** – Once the required number of references (you can set this number up later) have been submitted, the system will transition the applicant into a new workflow of your choice. *We recommend Interviewed,*
Ready to Submit Hiring Proposal, but if you collect references before requesting interviews, you may choose something else.

c. Recommendation Document Type – If you are using these options to request references, choose Reference Letter from the drop down.

Note: if you collect reference letters this way, do not include List of References of Reference Letters in the applicant materials section.

5) Posting Documents – this step is not used in the School of Medicine version of PeopleAdmin, so nothing is required here.

6) Click to move to the next step.

Note: the information entered on this screen is not editable by department users. If you would like to update any of these details, please contact our team.

Entering Posting Details

Certain fields you enter on this screen will appear on the applicant site exactly as you enter it on this screen, so please proofread carefully.

1) Title – think about the title from the potential applicant’s perspective. Is it clear and compelling? We have provided some basic options below.

a. Faculty in [Department]/ [Division]/ [Research Focus] – this is a good choice when the track or rank of the position is flexible and will be determined by the successful candidate.
   i. Faculty in Orthopaedic Surgery
   ii. Rheumatology Faculty
   iii. Faculty in Addictions Research
b. [Rank] [Track] [Department] – use this option if the track or rank is set in stone.
   i. Assistant/Associate Professor of Clinical [Department]
   ii. Research Associate in [Department or Research Area]
c. Descriptive Title – Use this when there is a descriptive option that applicants will recognize.
i. Anesthetist
ii. Chief of Pediatric Emergency Medicine

2) Specific Title – This field may be left blank, but can be used to provide additional information about titles
   a. Title – Director of the Herman B Wells Center for Pediatric Research
      Specific Title – Vice Chair for Research, Department of Pediatrics
   b. Title – Chief of Clinical Pharmacology
      Specific Title – Associate/Full Professor of Medicine

3) Appointment Type – Choose the appropriate appointment type from the drop down menu. If you need guidance on choosing the appropriate appointment type, email us. General guidelines are included below.
   a. Open – Use this if the track of the position could be determined by the successful candidate
   b. Postdoctoral Fellow – This track may be used for either type of postdoctoral hire. If you have questions about hiring procedures for postdocs, contact the Office of Postdoctoral Affairs.
   c. Scientist Track Faculty – Use this for either Scientist or Research Professor positions.

4) Campus – Choose the campus where this position will perform primary duties.

5) Affiliated Unit(s) – Use this field to include units such as the Simon Cancer Center or the Stark Neurosciences Research Institute if the search will include an appointment in that unit.

Pooled Positions

For pooled positions, add all position numbers you will hire into from the pool in the Pooled Position Numbers field. You only need to create one requisition for a pooled position and can submit hiring proposals for multiple applicants in a single requisition.

Posting to HERC

The Higher Education Recruitment Consortium (HERC) is a non-profit consortium of over 700 colleges, universities, hospitals, research labs, government agencies, and related non- and for-profit organizations. Consortium members share a commitment to hiring the most diverse and talented faculty, staff, and executives.
We have partnered with HERC to automatically post our faculty positions to a number of national job boards at no cost to your department. To add a position to HERC, follow the steps below.

1. Create posting as normal.
2. In the Post to HERC dropdown, choose yes.
3. Check the boxes for HERC categories you would like your position to post to.

Note: If you choose not to post your position to HERC, you will need to choose ‘Not posting to HERC’ in the Category field.

Adding Screening Questions

Screening Questions are individual questions that can be used to qualify/disqualify candidates, or rank applicants based upon a score. You may create those questions in this section.

If you are not adding any Screening Questions, click the Next button.
To add a Screening Question to this Requisition, click on the **Add a Question** button, which returns the following page.

The first step is to search existing questions. You can enter a keyword to search the question text. The system will return a list of all questions that have been entered previously. Select one of the questions from the list if it is appropriate for this Requisition.

If you do not find an applicable sample question from the list, you may create a question from scratch by clicking on the **Add a New One** link at the bottom of the Search Results screen. Only the IUB system administrator will be able to change the status of question; all other user groups will have their question in a “Pending” status awaiting system administrator approval.

To add a new question:

1) Enter the information you wish to ask all candidates who apply to this Posting.
2) Select either Open Ended or Predefined Answers:
   a. Closed Ended questions require a multiple-choice answer. For example:
      
      *Do you have experience working in an office environment?*
      
      Possible Responses: Yes or No
b. Open Ended questions do NOT require a multiple-choice answer. For example: *Describe any work experience relevant to this position.*

3) Click **Submit** at the bottom of the screen.

From this screen you may continue to add more questions by clicking the **Add a Question** button. You may also delete a question by clicking the x next to the relevant question.

You can **Require** an applicant to provide an answer to the question you added. The applicant will not be allowed to proceed without answering a question with the “Required” status. To require the question, check the required box.

When you have finished adding screening questions for this Requisition, click the **Next** button.
Documents Needed to Apply

On this screen, you will designate the documents that will be necessary for applicants to apply to this posting. You can make this determination on a posting by posting basis. If a document is optional, select the Optional radio button; if it is required, select the Required radio button.

Posting Documents

On this screen, you may add documents that you wish to internally add to the posting. The IUSM requires initiators to upload the job advertisement to ensure it includes the OEO tagline and matches your posting requisition.

Search Committee Members

This is where you can list any Search Committee Members who are assigned to this posting. OEO requires a minimum of three members of diverse gender and ethnicity.
1) Click “Add Existing User” and type in the name of the user you wish to add. Click “Add Member” and “Committee Chair” if they will hold this title.

2) Committee members who are not in the system can be added manually (even if they do not have an @iu.edu account) by clicking “Add New User.”

You can communicate with search committee members in People Admin on the following page.

**Review Posting**

After adding additional reference details if applicable, the system will then bring you to a summary page where you can review the posting and take the following actions:

1) If you need to make changes, click “Edit” next to the posting title or in posting details. IUSM and OEO approvers are screening for consistency between titles and appointment types, minimum qualifications like credentials, and inclusive/exclusive ad language.

2) If you are ready to send it for approval, click the orange “Take Action on Posting” and **Send to Department Approver for Anesthesia, Medicine and Pediatrics** or **For All Other Departments Send to School Approver.**

The system will generate an email to the next level approver and this posting will appear in their inbox for their approval. Once the position has received final approval, it will be posted and you will receive a notification. Approval of postings route as follows:
1) Initiator
2) Department Approver (for Anesthesia, Medicine, Pediatrics ONLY)
3) School Approver
4) OEO Approver
5) Posted

**Edit a Posted Position**

Sometimes you will need to make an edit to a position that has already been posted. Some examples include:

- Changing the priority application deadline
- Updating which materials are required for application
- Spelling and grammar edits

These changes will not cause the position to be re-routed for approval and will be live on the website once you have completed the following steps.

![Note](image)

Note: this option should not be used to change posting details in order to accommodate a hire type not included in the original posting. For example – you may not use this method to change the track from Clinical to Open or Tenure track in order to appoint a candidate from the pool into a tenure track position. If you have questions about this, please contact Liz Whitaker at whitakea@iu.edu.

1. Select the ‘Postings’ tab from the navigation pane at the top of the screen.
2. Click on the title of the position you would like to edit.
3. Click ‘Edit’ next to Posting Details.
4. Make the necessary edits and click **Save**.
5. When all edits are complete, navigate back to the summary page from the menu on the left.
6. From , select ‘Publish changes for this posting to the Applicant Portal’.
7. In the popup comment box that appears, outline what changes you have made and click .
Umbrella Ads

An umbrella ad refers to an advertisement that highlights multiple positions within a unit or department. These provide both time and cost saving benefits to departments that are either recruiting for similar positions at the same time or have a list of positions for which they are always recruiting.

⭐ Important note: If your department currently uses umbrella ads, please ensure that the application instructions are updated to indicate that interested individuals should visit the IU Jobs website to apply the next time it is placed externally.

1. A separate posting will need to be created in PeopleAdmin for each division/track combination so that candidates can find the correct posting to apply to.
   a. The Position Announcement should be limited to this specific pooled position. Please do not reference other open positions within the department in this announcement.

   🐻 This represents a change from FAM, where the text in the position announcement field had to match the text in the ad verbatim. We now ask for an ad
<table>
<thead>
<tr>
<th>Title</th>
<th>Asst./Assoc./Professor of Clinical Medicine - Endocrinology</th>
</tr>
</thead>
<tbody>
<tr>
<td>Specific Title</td>
<td></td>
</tr>
<tr>
<td>Appointment Type</td>
<td>Clinical Track Faculty</td>
</tr>
<tr>
<td>Department</td>
<td>IUSM - Medicine - Endocrinology</td>
</tr>
<tr>
<td>Campus</td>
<td>IU School of Medicine Indianapolis</td>
</tr>
<tr>
<td>Affiliated Unit(s)</td>
<td></td>
</tr>
<tr>
<td>Pooled Position</td>
<td>Yes</td>
</tr>
<tr>
<td>Pooled Position Numbers</td>
<td>00044303&lt;br&gt;00044304</td>
</tr>
</tbody>
</table>

**Position Announcement**

The Department of Medicine at the Indiana University School of Medicine is seeking outstanding candidates for clinical track faculty in Endocrinology/ Metabolism.

Interested candidates should visit [https://indiana.peopleadmin.com/postings](https://indiana.peopleadmin.com/postings). The search committee will begin evaluating applications as they are received and applications will continue to be reviewed until positions are filled.

About the School and Department: The Indiana University School of Medicine is located at nine sites throughout Indiana. Please visit [http://medicine.iupui.edu/about/](http://medicine.iupui.edu/about/) for additional information about the Department of Medicine.

About the Campus: To learn more about the Indiana University-Purdue University Indianapolis campus, please visit [http://www.iupui.edu/about/](http://www.iupui.edu/about/).

Indiana University is strongly committed to achieving excellence through cultural diversity. Candidates must be sensitive to the needs of and possess an interest in working in an academic community that is diverse with regard to gender, race, ethnicity, nationality, sexual orientation, military status, and religion. In addition, it is the University’s policy to provide reasonable accommodations for qualified persons with disabilities. Indiana University is an EEO/AA employer, M/F/D/V.

**Basic Qualifications**

Clinical-track (non-tenure track for full-time clinician/educators):
- Assistant Professor of Clinical Medicine, Associate Professor of Clinical Medicine, Professor of Clinical Medicine: M.D. and board-eligibility or certification in Internal Medicine or its specialties is required.
2. The full text of the umbrella ad must be uploaded to the ‘Search Documents’ page. Formatting is not important, but the text must match what will be sent to advertisers and include:
   a. Instructions to apply via PeopleAdmin (https://indiana.peopleadmin.com/postings)
   b. Appropriate OEO language

SEARCHING POSTINGS

To search for postings in the system, you will go to the Posting tab on the top menu. The system will return your default posting search results. You can customize your search results based on how you wish to view the posting data. There is a keyword search where you can type in a word and search for the posting. The most common fields are indexed for the keyword search. The Add Column feature allows you to index additional fields in your search results.

To search for items on a page

1. The text search box allows you to search for specific words or names
2. Select more search options to expand the search tools area
3. Use the searching and filtering tools to narrow down the results that the system presents:
   - You can add columns if the information you need is not included on the page
4. Use the column controls to organize and sort the search results:
   - Move a column to the left or to the right using its left and right controls
   - Delete a column using its delete control if you do not want to display it. If you need to add it back later, use the add columns control to do so
   - Order the search results by sorting a column in ascending or descending order using its up and down controls

You can use all these tools in any order.

**Search tips**

- Text search is not case sensitive
- Searches normally return items that contain all your search terms. For example, if you enter facilities manager, the search returns items that contain both these words
- To exclude search results, use the - character. For example, to search for postings that contain the word "director" but not "athletic", enter director !athletic or director -athletic, placing a space before the ! or - character
- To search for a phrase that contains a dash or a space, enclose the entire phrase in quotation marks: "director - athletic"
- You can't do a search that only specifies what not to return, such as !coordinator
- You can't do a search for a word or phrase that was selected from a drop-down list, such as the name of a state, but you can use filtering to find the information.

**Exporting & Saving**

**To export search results**

1. Set up the search or open a saved search.
2. From the Actions menu, select Export Results. The search results are saved in .xls format. Depending on your browser, the file may automatically download to your computer's download folder, or you may be prompted to choose whether you want to open or save the file.

**To save a search**

When you save a search, you have the option to set it as your default search. This is your only opportunity to set it as the default search.

People with administrative access can share saved searches by tagging them as global or group saved searches. Non-administrative users can only save personal searches.
1. After you have used the search and filtering controls to present the search results the way you want to see them, select **Save this search**. The Saved Search area expands.

2. Give the search a name that will help you remember its purpose.

3. Select one of these:
   - **Personal Saved Search** – Only you will have access to this search.
   - **Group Saved Search** – The search will be available to all users within the groups that you specify. Select at least one group from the list that appears when you select the Group Saved Search option. To select more than one group, hold down the Ctrl key while you select the groups.
   - **Global Saved Search** – The search will be available to all users within your organization.

4. If this search presents the information you will normally want to see when you navigate to this page, you may want to select **Make this the default search**.

5. Select **Save this search**. The search tab refreshes to present the name you have given the search. This tab remains available for the rest of your session. The next time you log in, the search is available from the list of saved searches in that area.

You can delete your personal saved searches when they are no longer useful to you.

**To run a saved search**

1. Access the list of items you need to search.
2. From the **Open Saved Search** menu, select the search you want to run. A new tab presents the search results.

**To delete a saved search**

1. Access the list of items you need to search.
2. From the **Open Saved Search** menu, select the search you want to run. A new tab presents the search results.
3. Select the **Delete (X)** control placed just after the name of the search and the number of search results returned. A message asks you to confirm that you wish to delete the saved search.
Applicant Management

There is no pre-review of applicants to ensure they meet minimum qualifications performed at the school level (like there is in the Staff version of PeopleAdmin), so all applicants for a position will be available in the ‘Applicants’ tab for each position. To identify a subgroup of applicants for committee review or request approval of the interview pool from OEO, you will move applicants through a workflow.

Reviewing Applicants

1. Select the ‘Postings’ tab from the navigation pane at the top of the screen.
2. Search for/locate the posting for which you need to review applicants. Hover over and select View Applicants from the drop down.

To view an applicant’s documents one at a time

1. Locate the applicant of interest from the complete list of applicants on the posting.
2. Select the document of interest.

To view one applicant’s application materials as a single file

1. From the ‘Applicants’ tab on the posting, click the More Search Options button.
2. From the ‘Add Column’ dropdown menu, choose ‘Combined Document’ and wait for the page to refresh with the new column.
3. Identify the applicant whose materials you would like to view and click the Generate button.
4. After the page refreshes, click the View button.

To view a collection of applicant documents

You can select and review more than one applicant document at a time.

1. From the ‘Applicants’ tab on the posting, check the boxes to select the applicants of interest.
2. Do one of these things:
To see the selected applicants' materials together: From , select ‘Download Applications as PDF’. In the dialog box, select the types of documents you want to view, then .

See the selected applicants' materials separately: From , select Create Document PDF per Applicant. The system creates a PDF containing all the documents that you request.

Important Note: each applicant will have a history and workflow status that is independent from those associated with the posting.

Workflow State Types

Pre-interview Options

System Screened (Supplemental Questions) – if your posting includes Supplemental Questions and you have selected to have those questions screen candidates, applicants who do not select the desired option will be automatically moved to this workflow state.

Review List - use this option if the pool is going to be narrowed before committee review.

Basic Qualifications Not Met – move the candidates not being forward to the committee for review to this workflow state.

Select for Interview, OEO Review – move any candidates that the committee chooses to interview into this workflow state.

Not Interviewed, Not Selected – use this for applicants reviewed by the committee, but not selected for an interview.

Withdrawn – if an applicant no longer wishes to be under consideration, move them to this workflow state.

*OEO ONLY* Approved for Next Steps – Upon approval of the applicant/interview pool, OEO will move the applicant to this workflow state.

Post-interview Options

Applicant Declined Interview – this is similar to withdrawn, but indicates that the withdrawal happened after receiving an interview invitation.

Short List – these candidates have been interviewed and are still in the running.
Interviewed, Not Selected – applicants who have interviewed for, but are not being offered the position should be moved to this workflow state.

Request Reference Letters – move applicants to this workflow type if you required that applicants include a list of references on their application. If you chose this workflow state when setting up your posting, PeopleAdmin will automatically request letter from the individuals indicated on the application.

Interviewed, Ready to Submit Hiring Proposal – move the applicant that you would like to offer this position to into this workflow state.

Declined Offer – if the applicant declines the offer, move them to this workflow state.

Moving Applicants in the Workflow

Moving a Single Applicant
1. From the Applicants tab on the posting, click the name of the applicant you wish to view/move.
2. From the orange Take Action on Job Application drop down menu, select the desired workflow state.

Moving Multiple Applicants to the Same Workflow State

This is the suggested, but not only way to use this function.
1. From the Applicants tab on the posting, check the box next to the name of the applicants you wish to move.
2. From , select ‘Move in Workflow’.
3. From the Change for All Applicants drop down menu, select the workflow to move all candidates in the list to.
4. Save changes
Hiring Proposals

Hiring Proposal – The Hiring Proposal is the PeopleAdmin vehicle that contains applicant documents and the offer packet for routing and approval.

Offer Packet – This is a single combined PDF document that contains all of the items required based on IUSM and IUPUI requirements. The [IUSM Academic Administration](#) website outlines all requirements.

 образом FAM users, please note that Offer Packets can no longer be delivered directly to IUSM Academic Administration. All offers must be routed via a PeopleAdmin Hiring Proposal.

Creating and Routing a Hiring Proposal

1. Move applicant in the workflow to ‘Select for Interview – OEO Review’.
2. OEO will review the applicant/interview pool and either approve or deny your request.
3. Once OEO approval has been received, the applicant will be in the ‘Approved for Next Steps’ workflow state.
4. Click on the name of the applicant you have selected to offer to. From the drop-down menu, choose ‘Interviewed – Ready to Submit Hiring Proposal’.
5. A new option called ‘Start Hiring Proposal’ will appear, select that option.

6. Choose ‘Start Hiring Proposal’.
7. Ensure the name and appointment information on the screen is correct and enter the start date. Then choose Next >>.
8. From **Actions**, choose ‘Upload New’ and upload Offer Packet documents. All of the required documentation will need to be combined into one document. If you aren’t sure what all needs to be submitted, visit the [IUSM Academic Administration](#) website for details.

9. Click **Choose File** to select your document and then click **Submit**.

10. Click **Next >>**.

11. From **Take Action On Hiring Proposal**, select the appropriate option for your department.
   a. If the position is in Anesthesia, Medicine, or Pediatrics AND you are in the initiator role, select the option to route to the department for approval.
   b. If you are in the department approver role OR an initiator in any other department, select the option to route to the school for approval.

**Editing a Returned Hiring Proposal**

If the School Approver determines that the Offer Packet attached to a Hiring Proposal requires edits, the proposal will be returned to the Initiator in PeopleAdmin and an email will be sent outlining required edits.

1. From the ‘Hiring Proposals’ tab, select the hiring proposal that you need to edit.
2. Click ‘Edit’ next to the Hiring Proposal Documents header.

3. From **Actions**, choose ‘Unassign’.

4. Once the page has refreshed, from **Actions**, choose ‘Upload New’ and upload updated Offer Packet documents.

5. Click **Choose File** to select your document and then click **Submit**.

6. Click **Next >>**.

7. From **Take Action On Hiring Proposal**, select the appropriate option for your department.
   a. If the position is in Anesthesia, Medicine, or Pediatrics AND you are in the initiator role, select the option to route to the department for approval.
b. If you are in the department approver role OR an initiator in any other department, select the option to route to the school for approval.

Hiring Routing
Non-Tenure Track Appointments

Initiator/Department Approver
School Approver - Tabatha Massingille
Approved for Offer

Tenure Track Appointments

Initiator/Department Approver
School Approver - Tabatha Massingille
IUPUI Faculty Appointments and Advancement
Approved for Offer
**Pooled Position Hiring Proposals**

Put the position number in the comments section when you route the Hiring Proposal for approval, as well as on the offer cover sheet. You can submit as many hiring proposals as there are position numbers in the original posting requisition. You will use the aforementioned hiring proposal instructions for each applicant you propose to hire.

**Closing Postings**

Initiators will be able to cancel postings but only the School Approver can close them once applicants are entered. To close a posting after an applicant accepts the offer:

1. Initiator moves all applicants to final workflow states (rejections for all but the successful candidate who will move to **Hired**).
2. School Approver will move the posting to closed.

**Hiring Internal Candidates**

In the majority of cases internal candidates will go through the same process as all other candidates. If the internal hire is making a lateral move and there are no changes to rank or salary, an abbreviated process may be followed.

1. Move any unselected applicant(s) to the appropriate workflow state
2. Request that the Office of Faculty Talent Management(Liz Whitaker or Tabatha Massingille) move the selected internal applicant to Hired
3. Move the Posting to ‘Posting Filled’
Troubleshooting

Viewing Draft Applications for a Position
It may be helpful sometimes to know if anyone has started the application process for a position and not submitted.

1. Go to the posting and click ‘Applicants’.

2. Click ‘More Search Options’ and check the box next to ‘Draft?’. Then hit the ‘Search’ button.
3. You will now see a list of any applications that have been started for the position.
4. Select the applicant you would like to review. You will see their entries into the application along with the missing or incomplete items, which will be designated by

![Applicant Details]

1. In the search area of the posting's applicants list, add the "Document Conversion Status" column to this search view to see whether any applicants have submitted documents that did not convert properly to PDF. If an applicant uploads a document that fails to convert to PDF, the application will need to be reactivated so the applicant can provide a new document. See [Helping Users and Applicants](#) in the Online Help for instructions.
File Too Large for Hiring Proposal

For the Submitter
If your Offer Packet file is too large to be uploaded in the Hiring Proposal, try removing the CV and uploading the new file.

For the Approver

If you have a Hiring Proposal to review that is missing the CV, you can find the CV in the original application.

1. From the Hiring Proposal for the specific candidate, scroll to the bottom of the page.
2. Under PDF Documents, click Generate.

3. A PDF will be created with the materials submitted by the applicant with a PeopleAdmin application coversheet. The CV will be located in that file.
Admin Module for Dept, School, and Campus Approvers

GETTING STARTED

After entering the URL https://indiana.peopleadmin.com/hr/ the “login screen” for the system will appear and should be similar to the following screen:

![Login Screen]

This page is designed to help you keep track of the actions required by you or your department.

This page is a dashboard to help you keep track of actions and postings:

- Items in your Inbox require your attention.
- Items on your Watch List are things you have selected to keep an eye on during the approval process.

**Posting Approval**

Select the appropriate role from the **Current Group** drop down. Only Initiators can create postings. Department, School, and Campus approvers can only approve for the assigned group.

1. Check your **Inbox** or the **Postings** tab for items awaiting your approval.
2. Click the hyperlinked **Job Title** to view the posting and take action.
3. After reviewing the **Posting**, use the **Take Action on Posting** drop down to return/send:
   a. Click **Return to Previous Level (Initiator/Department/School)** if the posting needs edited before being approved. A comment box will appear to state why it is being returned.
   b. Click **Send to Next Level (Department/School/OEO)** if posting meets approval criteria.
Approvers – Degree Requirements

One of the responsibilities of the IUSM School Approver role is to verify that the Basic Qualifications listed in a posting match the track and rank being advertised for.

All academic positions, except for Academic Specialist, Research Associate, and Lecturer Track positions, require a terminal degree. A terminal degree is the highest degree awarded in a given field. In most cases, this is a doctorate level degree (MD, PhD, etc.) but there are a few cases in the School of Medicine where a Master’s Degree is considered terminal.

<table>
<thead>
<tr>
<th>Department</th>
<th>Program</th>
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</thead>
<tbody>
<tr>
<td>Anesthesia</td>
<td>Anesthesiology Assistant Program</td>
</tr>
<tr>
<td>Medical &amp; Molecular Genetics</td>
<td>Genetic Counseling</td>
</tr>
<tr>
<td>Pathology &amp; Laboratory Medicine</td>
<td>Clinical Laboratory Sciences</td>
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<td></td>
<td>Cytotechnology</td>
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<td>Histotechnology</td>
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<td>Pathologists’ Assistant Program</td>
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<td>Radiation Oncology</td>
<td>Radiation Physics</td>
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<td>Radiation Therapy Technology</td>
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<tr>
<td>Radiology &amp; Imaging Sciences</td>
<td>Radiologic &amp; Imaging Sciences</td>
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<tr>
<td>Ruth Lilly Medical Library</td>
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</tr>
</tbody>
</table>
OEO Interview Approval

After the initiator submits the Request for Interview, OEO Review, OEO will receive a notification by email prompting review. Navigate to the posting and click Applicants to review the pool and workflow states.

1. Click on the hyperlinked applicant name to view individual applications and demographic information.

2. To approve individual applicants for interviews from their application page, select Candidate Approved for Next Steps from the orange Take Action on Job Application drop down.

3. To approve multiple interviews in bulk, from the Applicants tab check the box next to each applicant and select Move in Workflow from the orange Action drop down.

4. From the Take Action on Posting menu click Approve Pool for Interview and save changes.
Hiring Proposal Approval

After the initiator changes an applicant to the workflow state **Interviewed, Ready to Submit Hiring Proposal** and sends the **Hiring Proposal**, the next level approver (Dept/School/FAA) will receive a notification by email prompting review. Navigate to the **Hiring Proposals** tab where you can hide/add search options to organize by department, workflow state, date created, etc. Click the hyperlinked **Title** to review the **Hiring Proposal**.

1. The hiring proposal text fields only capture basic information. Navigate to the **PDF Documents** section of the hiring proposal to review the application and combined documents (approval of terms cover sheet and required documents).
2. After reviewing the **Hiring Proposal**, use the orange **Take Action on Hiring Proposal** drop down to return/send:
   a. **Click Return to Previous Level** (Initiator/Department/School) if the posting needs edited before being approved. A comment box will appear to state why it is being returned.
   b. **Request Offer** to Next Level (Department/School/FAA) if proposal meets criteria.
To print a hiring proposal

1. Locate the hiring proposal and open it for viewing.
2. Select Print Preview. The system presents a printable view.
3. Use your browser’s Print feature to print the document.
4. Use your browser’s Back button to return to the main view of the hiring proposal.

When the hiring proposal is finalized, the initiator will move the applicant to **Hired**.

At this point, the **School Approver** will move the Posting to filled. This will complete the close out process of your posting in PeopleAdmin.

**Approvers – Updating Offer Packets in a Hiring Proposal**

When viewing the Hiring Proposal, click Edit next to Hiring Proposal Documents.
Under the Actions dropdown, select ‘Unassign’.
Then, from the same drop down, select ‘Upload New’.

You will then be able to upload the new document and Save.