

## Instructions:

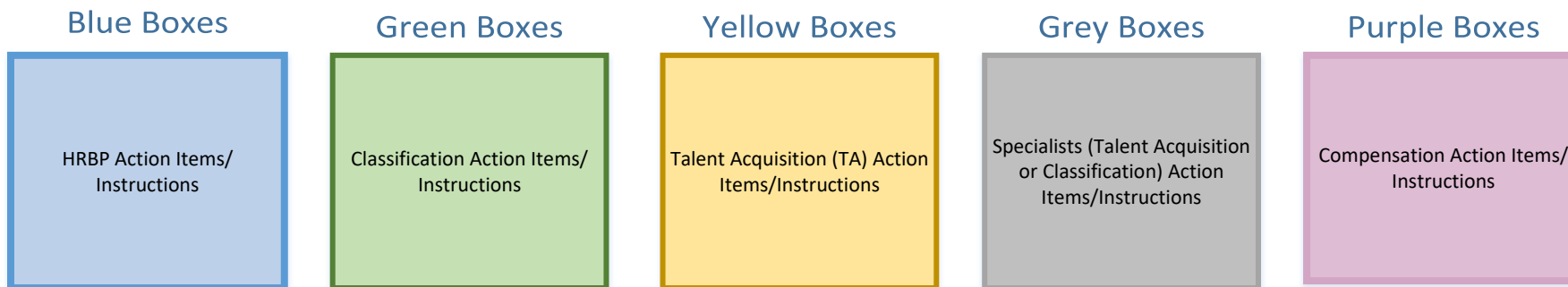
The following workflows show the step-by-step instructions to process classified transactions. Specifically, the search process, appointment type 1 transactions, promotions (classified reallocations), and job description update-only reviews. The workflows have been color-coated to denote who is responsible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

Additional Resources on each page may include:

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

**Note:** Outline items to remember when submitting a transaction.

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



## BP Enters Smartsheet Request

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

*\*Step-by-Step Instructions on how to complete a Search or Hire (Apt Type 1) can be found on the **Central HR website***

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

**Prior to submitting a request, please ensure:**

- All required fields have been completed AND
- The following documents have been attached: 2023 Combined PDQ & Job Ad template and 2<sup>nd</sup> level budget approval (*if applicable and using an existing position number*). **Refer to 2LA Quick Tip.**

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

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

**Hyperlink will take you to Smartsheet Request Form ([LINK](#))**

### Quick Tip:

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

### Quick Tip:

Information on the budget approval process for each Campus, School, College, Department, etc. can be found here ([LINK](#)).

## Specialist

### Approves TBT

The **Talent Acquisition or Classification Specialist** will approve the Classified TBT Transaction.

## Classification Evaluates PDQ & Updates HCM

**Classification** will review and formally classify the description.

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

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

**Classification** will create a non-person profile (NPP) in HCM.

# State Classified – Begin Search

## BP Secures Budget Approval

**If not applicable, please move to next steps.**

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

## TA Approves Job Ad & NPP

**Talent Acquisition (TA)** will evaluate and approve the job advertisement and NPP.

**Talent Acquisition** submits a request to post role in CU Careers. BP will receive notification of this step.

## Specialists Post Position

**Talent Acquisition or Classification Specialist** will post the position in CU Careers.

Once posted, the BP will receive a "Now Posted" email. *Direct links will only be available for external postings.*

## TA Initiates Search & Makes Referral

Using Recruitment or Full Service, Talent Acquisition will begin the Classified Search Process. **This includes:**

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

## BP Enters Pre-Offer Step #2

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

To complete the Pre-Offer Step #2, BP will need to:  
Disposition/Notify candidates in CU Careers  
Create a Letter of Offer ([LINK](#))  
Submit a background check request (if applicable)

## Comp Completes Equal Pay Analysis

Central HR Compensation will review the Pre-Offer Step #1 request and approve with an Equal Pay Rate or Range.

**BP will receive an approval email and may now extend a verbal offer to the finalist.**

## BP Conducts Final Interviews & Identifies Finalist

Specific guidance on process and timelines will be provided to the BP via email throughout the search process.

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

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

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

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

## TA Approves Step #2 & Closes Search

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

BP will receive an approval email.

## BP Completes & Announces Hire

BP completes hire in HCM. Please reference the HCM Hiring an Employee Guide for more information ([LINK](#))

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

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

# State Classified – Appointment Type 1

## Finalist Identified (References & Pre-Offer Step #1)

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

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

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

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

### Note:

**Appointment Type #1** = Under Classified State Rule, an Appointment Type is an additional hire made by repurposing an eligibility list. A formal search must have been conducted in order to make an additional hire. **Eligibility list must still be active (within the 30 day window). Please contact your Talent Acquisition Consultant for more information.**

## Specialist Approves TBT

The **Talent Acquisition or Classification Specialist** will approve the Classified TBT Transaction.

## Comp Completes Equal Pay Analysis

Central HR or SOM Compensation will review the Pre-Offer Step #1 request and approve with an Equal Pay Rate or Range.

**BP will receive an approval email and may now extend a verbal offer to the finalist.**

### Quick Tip:

\*For 610/611 funded positions, BP will secure 2<sup>nd</sup> level budget approval.

Information on the budget approval process for each Campus, School, College, Department, etc. can be found here (LINK).

## BP Completes & Announces Hire

BP completes hire in HCM. Please reference the HCM Hiring an Employee Guide for more information (LINK). Position number for new hire must match the Official Letter of Offer

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

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

## BP Enters Smartsheet Request

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

*\*Step-by-Step Instructions on how to complete a Search or Hire (Apt Type 1) can be found on the **Central HR website***

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

**Prior to submitting a request, please ensure:**

- All required fields have been completed AND
- The following documents have been attached: 2023 Combined PDQ & Job Ad template, candidate's resume and 2<sup>nd</sup> level budget approval (if applicable and using an existing position number). Refer to 2LA Quick Tip.

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

**Hyperlink will take you to Smartsheet Request Form (LINK)**

## TA Approves Step #2

Talent Acquisition (TA) will approve Step #2.

BP will receive an approval email.

## BP Enters Pre-Offer Step #2

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

**Hyperlink will take you to the Pre-Offer Step #2 Request Form (LINK)**

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

- Create a Classified Letter of Offer
- Submit a background check request (if applicable)

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

## TA Reviews Request

**Talent Acquisition (TA)** will review the request and ensure the candidate is eligible for an Apt Type #1.

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

### Quick Tip:

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

## TA Reviews/Updates Position Information

**Talent Acquisition (TA)** will update Position Information (if applicable) or create a new position number.

Once created new position numbers will be visible in Dynamic View and emailed to the HRBP.

## BP Secures Budget Approval

**If not applicable, please move to next steps.**

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

## TA Enters NPP

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

# Classified - Reallocation (Promotion)

## BP Enters Smartsheet Request

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

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

**\*Please select Salary Adjustment or Promotion** to complete the correct form.

**Prior to submitting a request, please ensure:**

- All required fields have been completed AND
- The following documents have been attached: Red-Lined PDQ and 2<sup>nd</sup> level budget approval (if applicable). **Refer to ZLA Quick Tip.**
- **SOM ONLY:** Please attached a copy of your SOM Natural Progression Promotion approval for all promotion requests

**Hyperlink will take you to Smartsheet Request Form (LINK)**

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

## Classification Evaluates Promotion Request

**Classification** will review request, panel (if necessary) and formally classify the updated PDQ.

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

## Classification Updates HCM

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

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

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

## Specialists Post Position

**Talent Acquisition or Classification Specialist** will post the position on the Internal Job Board in CU Careers.

Once posted, the BP will receive a "Now Posted" email.

*Direct links are not available for internal only postings*

## Classification Monitors Announcement

**Classification** will monitor announcement, screen applicants, confirm the subject of the promotion is eligible for reallocation.

Classification will provide an update to BP once the 5-day posting window closes.

*\*If more than one application is received, a comparative analysis process will be required.*

## Classification Routes Request to Comp

Using the original request submitted through the Transaction Center **Classification** will route this Classified Reallocation to Compensation for review/approval.

## Comp Completes Equal Pay Analysis

Central HR Compensation will review the request and approve with an Equal Pay Rate or Range.

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

## BP Creates Addendum Letter

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

## Classification Approves Letter

**Classification** will review and approve the Addendum Letter of Offer via email.

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

**Hyperlink will take you to Background Check Request Form (LINK)**

## BP Enters Pay Rate Change

BP enters a Template Based Transaction (TBT) Pay Rate Change (Reason: Promotion)

Please reference the **HCM Pay Rate Change Guide** for more information. (LINK).

**\*Follow steps specific to the promotion process.**

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

## Specialist Approves TBT

The **Talent Acquisition or Classification Specialist** will approve the Classified TBT Transaction.

## BP Announces Promotion

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

**Quick Tip:**  
\*For 610/611 funded positions, BP will secure 2<sup>nd</sup> level budget approval.  
Information on the budget approval process for each Campus, School, College, Department, etc. can be found here (LINK).

**SOM ONLY:**  
(LINK) to Natural Progression Promotion Request Form

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

# Classified - In-Range Adjustment

## BP Enters Smartsheet Request

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

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

**\*Please select Salary Adjustment or Promotion** to complete the correct form.

**Prior to submitting a request, please ensure:**

- All required fields have been completed AND
- The following documents have been attached: Red-Lined PDQ and 2<sup>nd</sup> level budget approval (if applicable). **Refer to 2LA Quick Tip.**
- **SOM ONLY:** Please attached a copy of your SOM Natural Progression Promotion approval for all promotion requests

**Hyperlink will take you to Smartsheet Request Form ([LINK](#))**

## Classification Evaluates In-Range Request

**Classification** will review request, confirm classification based on new duties.

Once an evaluation is complete, Classification will forward the promotion to Compensation.

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

## Comp Completes Equal Pay Analysis

Central HR Compensation will review the request and approve with an Equal Pay Rate or Range.

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

## Classification Updates HCM

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

## BP Creates Addendum Letter

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

## Classification Approves Letter

**Classification** will review and approve the Addendum Letter of Offer via email.

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

**Hyperlink will take you to Background Check Request Form ([LINK](#))**

## BP Enters Pay Rate Change

BP enters a Template Based Transaction (TBT) Pay Rate Change (Reason: Increase in Base Pay)

Please reference the **HCM Pay Rate Change Guide** for more information. ([LINK](#)).

**\*Follow steps specific to the promotion process.**

Once the TBT Pay Rate Change is entered, please forward the HCM notification to [hr.recruiting@cuanschutz.edu](mailto:hr.recruiting@cuanschutz.edu) for approval.

### Quick Tip:

\*For 610/611 funded positions, BP will secure 2<sup>nd</sup> level budget approval.

Information on the budget approval process for each Campus, School, College, Department, etc. can be found here ([LINK](#)).

### Quick Tip:

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

## NOTE:

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

## Quick Tip:

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

### BP Enters Smartsheet Request

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

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

**\*Please select Update Job Description Only** to complete the correct form.

**Prior to submitting a request, please ensure:**

- All required fields have been completed
- AND
- The following documents have been attached: Red-Lined PDQ

**Hyperlink will take you to Smartsheet Request Form ([LINK](#))**

### Classification Evaluates Description

**Classification** will review and formally classify the description.

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

### Classification Updates HCM

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