

Instructions:

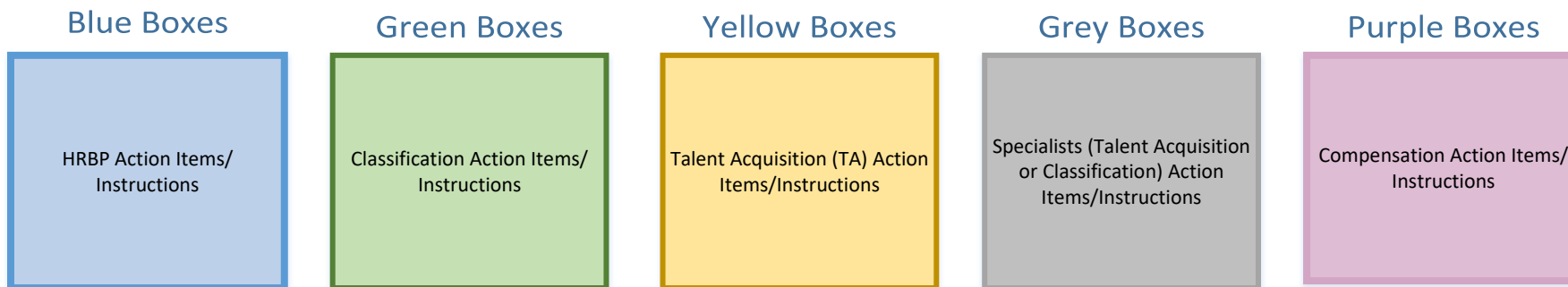
The following workflows show the step-by-step instructions to process classified transactions. Specifically, the search process, appointment type 1 transactions, promotions (classified reallocations), and job description update-only reviews. The workflows have been color-coated to denote who is responsible 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 2nd level budget approval (if applicable). **Refer to 2LA Quick Tip.**

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

Classification Evaluates PDQ

Classification will review and formally classify the description.

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

Quick Tip:

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

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

Classification Updates HCM

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

Quick Tip:

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

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 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 [\(LINK\)](#)

Quick Tip:

The Anschutz campus is not currently using the offer function in CU Careers (Taleo). TAC Recruiter will deny offers entered into CU Careers. HRBP will continue to use the Smartsheet Pre-Offer Step #1 and #2 process (see details above).

State Classified – Begin Search

Specialist

Approves TBT

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

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.

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 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.

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 [\(LINK\)](#)

Comp Completes Equal Pay Analysis

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

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

BP 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 2nd level budget approval (if applicable). **Refer to 2LA Quick Tip.**

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

TA Reviews Request

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

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

TA Updates HCM

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

Quick Tip:

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

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

Note:

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.

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.

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)

Quick Tip:

The Anschutz campus is not currently using the offer function in CU Careers (Taleo). TAC Recruiter will deny offers entered into CU Careers. HRBP will continue to use the Smartsheet Pre-Offer Step #1 and #2 process (see details above).

Quick Tip:

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

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 2nd level budget approval (if applicable). **Refer to 2LA Quick Tip.**
- **SOM ONLY:** Please attached a copy of your SOM Natural Progression Promotion approval for all promotion requests

Hyperlink will take you to Smartsheet Request Form (LINK)

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 a Smartsheet notification 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 2nd 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 2nd level budget approval (if applicable). **Refer to 2LA Quick Tip.**
- **SOM ONLY:** Please attached a copy of your SOM Natural Progression Promotion approval for all promotion requests

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

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 a Smartsheet notification 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 for approval.

Quick Tip:

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

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

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.