

Instructions:

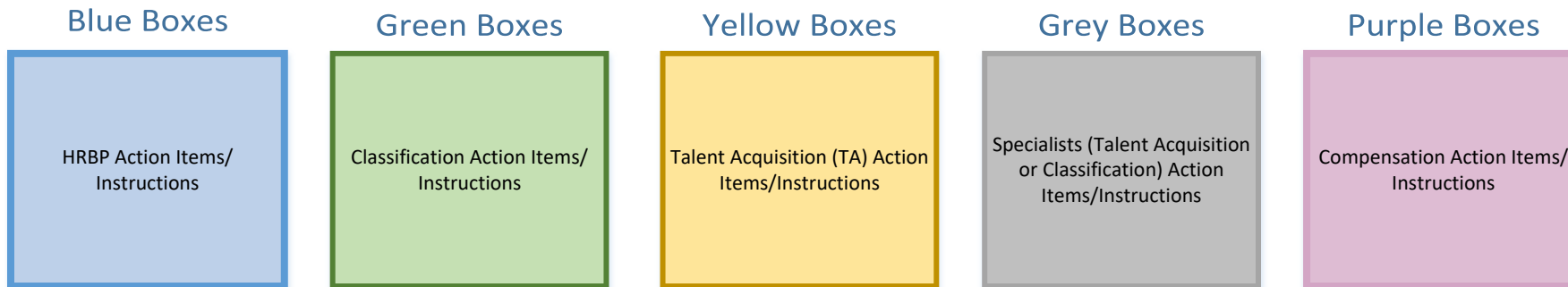
The following workflows show the step-by-step instructions to process university staff transactions. Specifically, the search process, appointment type 1 transactions, promotions, and job description update-only reviews. The workflows have been color-coated to denote who is responsible for the action. 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: **Critical Position Approval**, 2025 Combined Job Description & Job Ad template and 2nd 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.

- **SOM ONLY:** For new positions, at or above the Program Manager level SOM Approval should also be attached.

- **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](#))

SOM ONLY:

New Position Request Form (*used for Program Managers or above) ([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.

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Classification Evaluates JD & 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.

Quick Tip:

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

University Staff – 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.

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](#)).

Search Starts

Please reference the Talent Acquisition Service Matrix for more information about Consulting, Full & Recruitment Services.

BP (or Talent Acquisition if Recruitment Services) will manage candidate care and disposition/notify candidates in CU Careers throughout the search process. **Please reference our Candidate Care Step-by-Step Guide for more information ([LINK](#))**

Finalist Identified

BP will conduct reference checks using our online reference checking tool Crosschq 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](#))

To complete the submission form, BP will need the HR Transaction Center ID (ex. HR000000) provided when the Smartsheet Search was approved. Please contact your Talent Acquisition Consultant with any questions.

Quick Tip:

HRBPs can track the progress of their Pre-Offer Step #1 request at any time using the Dynamic View ([LINK](#))

TA Reviews & Routes Pre-Offer Step 1

Talent Acquisition (TA) will perform a Minimum Qualification review of the preferred hire, evaluate hire details and route Pre-Offer Step #1 to Compensation (Central or SOM) for approval.

University Staff – Begin Search

BP Enters Pre-Offer Step #2

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

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

Please make sure a copy of your Pre-Hire Step #1 approval notification is attached to the Step #2.

TA Approves Step #2 & Closes Search

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

For Open-Rank Hires, TA will make any necessary Position Information updates.

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](#))

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

Quick Tip:

HR Directors can track the progress of their Pre-Offer Step #1 request at any time using the Dynamic View ([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).

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

After a finalist is identified, the BP will conduct reference checks using our online reference checking tool Crosschq or via phone/email. For questions, please contact hr.recruiting@cuanschultz.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](#))

To complete the submission form, BP will need the HR Transaction Center ID (ex. HR000000) provided when **the initial Smartsheet Search** was approved. Please contact your Talent Acquisition Consultant with any questions.

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.

Quick Tip:

HRBPs can track the progress of their Pre-Offer Step #1 request at any time using the Dynamic View ([LINK](#))

TA Reviews & Routes Pre-Offer Step 1

Talent Acquisition (TA) will perform a Minimum Qualification review of the preferred hire, evaluate hire details and route Pre-Offer Step #1 to Compensation (Central or SOM) for approval.

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:

HRBPs can track the progress of their request at any time using the Searches and Hires 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 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: Critical Position Approval, 2025 Combined Job Description & Job Ad template, candidate's resume and 2nd 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.

- **SOM ONLY:** For new positions, at or above the Program Manager level SOM Approval should also be attached.

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

Note:

Appointment Type #1 = search waiver based on previous search. If a search has not been run, a standard search process must occur before a candidate can be hired.

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](#)).

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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 Reviews/Updates Position Information

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

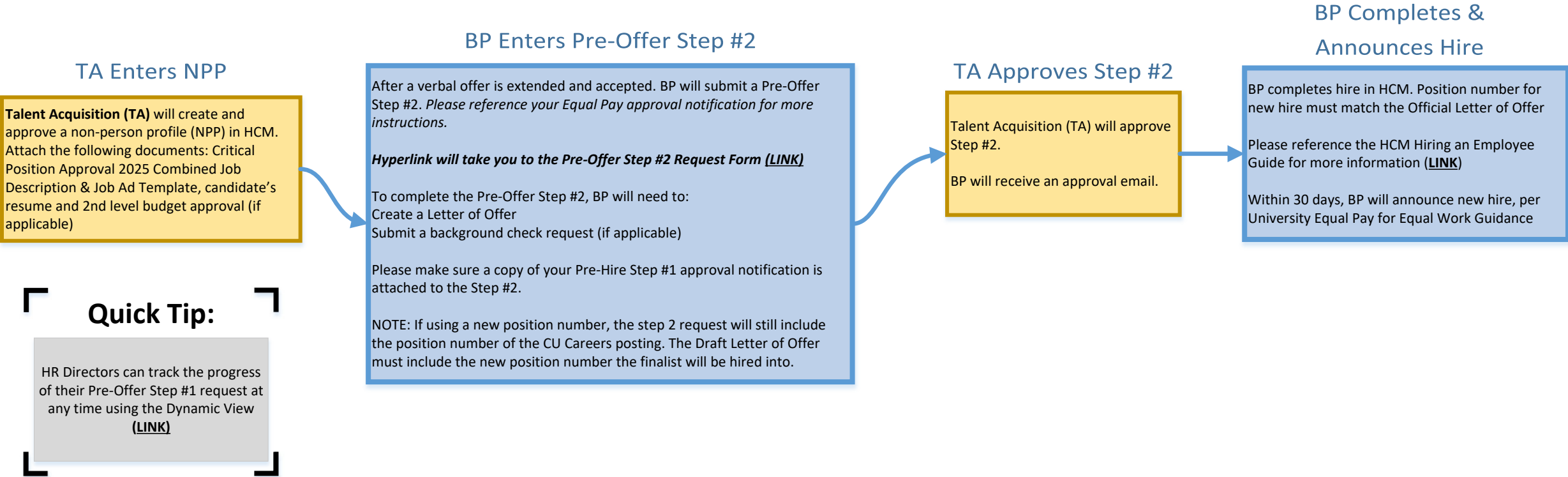
Once created new position numbers will be visible in Dynamic View and emailed to the HRBP.

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 Talent Acquisition Consultant directly in Smartsheet*

University Staff – Appointment Type 1



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).

Univ Staff - Update w/ Increase (Promotion)

NOTE:

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

SOM ONLY:

([LINK](#)) to Natural Progression Promotion Request Form

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: Critical Position Approval, Red-Lined Job Description, employee's resume and 2nd level budget approval (if applicable). **Refer to 2LA Quick Tip.**

- **SOM ONLY:** Please attach a copy of your SOM Natural Progression Promotion approval for all promotion requests

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

Classification Evaluates Promotion Request

Classification will review request, formally classify the updated description.

Based on **University Equal Pay for Equal Work Guidance ([LINK](#))** a competitive posting is no longer required for natural progression or career opportunity promotions.

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 or SOM Compensation will review the Update w/ Increase request and approve with an Equal Pay Rate or Range.

BP will receive an update from Classification with the approved rate/range. BP may now share the promotion details with the Supervisor/employee.

Classification Updates HCM

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

BP Secures Budget Approval

If not applicable, please move to next steps.

For Promotions, BPs can now submit a formal 2LA Budget Request, using the Comp approval email as reference. **Once approved, BP must forward 2LA approval email to Classification.**

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](#)).

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.**

For most Departments, an Internal Approver will review and approve TBT Pay Rate Change. If you need support approving a TBT for a promotion, please contact hr.recruiting@cuanschutz.edu.

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:

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

University Staff - In-Range Salary 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: Critical Position Approval, Red-Lined Job Description, employee's resume 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](#))

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:

Employee will remain in the same position number and job code.

Classification Evaluates Promotion Request

Classification will review request, formally and classify the updated description. Once an evaluation is complete, Classification will forward the promotion to Compensation (SOM or Central HR)

Based on **University Equal Pay for Equal Work Guidance ([LINK](#))** a competitive posting is no longer required for natural progression or career opportunity promotions.

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

SOM ONLY:

([LINK](#)) to Natural Progression Promotion Request Form

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.**

For most Departments, an Internal Approver will review and approve TBT Pay Rate Change. If you need support approving a TBT for a promotion, please contact hr.recruiting@cuanschultz.edu.

Comp Completes Equal Pay Analysis

Central HR or SOM Compensation will review the Update w/ Increase or In-Range Promotion request and approve with an Equal Pay Rate or Range.

BP will receive an update from Classification with the approved rate/range. BP may now share the promotion details with the Supervisor/employee.

Classification Updates HCM

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

BP Secures Budget Approval

If not applicable, please move to next steps.

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

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](#))

Quick Tip:

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

University Staff – Update Only

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 Update Only 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 Job Description

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.