

# University Staff Instructions & Process Guide

## **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.

## **Key:**

Blue Boxes = HRBP Action Items/Instructions

Green Boxes = Classification Action Items/Instructions

Yellow Boxes = Talent Acquisition (TA) Action Items/Instructions

Grey Boxes = Specialist (Talent Acquisition or Classification) Action Items/Instructions

Purple Boxes = Compensation Action Items/Instructions

## University Staff Search Process Guide

**Step 1: 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). Refer to 2LA Quick Tip.
- **SOM ONLY:** For new positions, at or above the Program Manager level SOM Approval should also be attached.

If using a brand new position number, 2LA will be secured after the Smartsheet submission (see Step 3).

If making 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:**

<https://app.smartsheet.com/b/form/544a62c3d6a14020a5e72fceed78d89>

**Step 2: 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.

**Step 3: 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.

**Step 4: 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.

**Step 5: 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.

**Step 6: 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.

**Hyperlink will take you to the Candidate Care Step-by-Step Guide:**

[https://www.cuanschutz.edu/docs/cuanschutzhumanresourceslibraries/talent-acquisition-and-compensation/candidate-care-step-by-step-guide---10-7-2022da9cf0ab-7cf4-42ea-a1b8-b0086bc079c5.pdf?sfvrsn=fb857bb4\\_1](https://www.cuanschutz.edu/docs/cuanschutzhumanresourceslibraries/talent-acquisition-and-compensation/candidate-care-step-by-step-guide---10-7-2022da9cf0ab-7cf4-42ea-a1b8-b0086bc079c5.pdf?sfvrsn=fb857bb4_1)

**Step 7: 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.

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.

**Hyperlink will take you to the Pre-Offer Step #1 Form:**

<https://app.smartsheet.com/b/form/268a650e4ac0429fbadd560cb918a1ca>

**Step 8: 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.

**Step 9: 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.

**Step 10: BP Enters Pre-Offer Step #2:** After a verbal offer is extended and accepted. BP will submit a Pre-Offer Step #2:

<https://app.smartsheet.com/b/publish?EQBCT=02b161fe4c5a4234b0e6f91d69383cff>

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.

***Hyperlink will take you to the Offer Letter Template Library:***

<https://www.cuanschutz.edu/offices/human-resources/hr-business-partners/offer-letter-templates>

**Step 11: TA Approves Step #2 & Closes Search:** HR will approve Step #2 and BP will receive an approval email.

**Step 12: BP Completes & Announces Hire:** BP completes hire in HCM. Please reference the HCM Hiring an Employee Guide for more information - <https://www.cu.edu/docs/sbs-hiring-employee>

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

**Quick Tips:**

- (1) HRBPs can track the progress of their request at any time using the Searches and Hires Dynamic View - <https://app.smartsheet.com/dynamicview/views/244c7990-2781-430e-9136-93ace9e082e0>
- (2) \*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 - <https://www.cuanschutz.edu/offices/bpcs/budget/second-level-approval>
- (3) 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).

SOM Only:

New Position Request Form (\*used for Program Managers or above) -

<https://app.smartsheet.com/b/form/2ea0e1d4178f4e1d889ff0163ea84af1>

## University Staff Appointment Type #1 Process Guide

**Step 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 Crosschq or via phone/email. For questions, please contact [hr.recruiting@cuanschultz.edu](mailto: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.**

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.

**Hyperlink will take you to the Pre-Offer Step #1 Request Form:**

<https://app.smartsheet.com/b/form/268a650e4ac0429fbadd560cb918a1ca>

**Step 2: 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.

**Step 3: 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.

**Step 4: 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.
- **SOM ONLY:** For new positions, at or above the Program Manager level SOM Approval should also be attached.

If using a brand new position number, 2LA will be secured after the Smartsheet submission (see Step 6).

**Hyperlink will take you to Smartsheet Request Form:**

<https://app.smartsheet.com/b/form/544a62c3d6a14020a5e72fceed78d89>

**Step 5: 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.

**Step 6: 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.

**Step 7: 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 Talent Acquisition.

**Step 8: Talent Acquisition Enters NPP:** Talent Acquisition (TA) will create and approve a non-person profile (NPP) in HCM and attach the following documents:

- Critical Position Approval
- 2025 Combined Job Description & Job Ad Template
- Candidate's resume
- 2nd level budget approval (if applicable).

**Step 9: BP Enters Pre-Offer Step #2:** After a verbal offer is extended and accepted. BP will submit a Pre-Offer Step #2:

<https://app.smartsheet.com/b/publish?EQBCT=02b161fe4c5a4234b0e6f91d69383cff>

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.

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.

**Hyperlink will take you to the Offer Letter Template Library:**

<https://www.cuanschutz.edu/offices/human-resources/hr-business-partners/offer-letter-templates>

**Step 10: TA Approves Step #2 & Closes Search:** HR will approve Step #2 and closes out search in CU Careers. BP will receive an approval email.

**Step 11: BP Completes & Announces Hire:** BP completes hire in HCM. Position number for new hire must match the Official Letter of Offer.

Within 30 days, BP will announce new hire, per University Equal Pay for Equal Work Guidance <https://www.cu.edu/docs/sbs-hiring-employee>

**Quick Tips:**

- (1) 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.
- (2) HRBPs can track the progress of their request at any time using the Searches and Hires Dynamic View - <https://app.smartsheet.com/dynamicview/views/244c7990-2781-430e-9136-93ace9e082e0>
- (3) \*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 - <https://www.cuanschutz.edu/offices/bpcs/budget/second-level-approval>
- (4) 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).

SOM Only:

New Position Request Form (\*used for Program Managers or above) - <https://app.smartsheet.com/b/form/2ea0e1d4178f4e1d889ff0163ea84af1>

## University Staff Promotion (Update w/ Increase) Process Guide

**Step 1: 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:**

<https://app.smartsheet.com/b/form/544a62c3d6a14020a5e72fceed78d89>

**Step 2: Classification Evaluates Promotion Request:** Classification will review request, formally classify the updated description. Once an evaluation is complete, Classification will forward the promotion to Compensation.

Based on **University Equal Pay for Equal Work Guidance** 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*

**Hyperlink will take you to the revised Equal Pay for Equal Work Posting Guidance:**

[https://www.cuanschutz.edu/docs/cuanschutzhumanresourceslibraries/talent-acquisition-and-compensation/equal-pay-for-equal-work-act---guidance-updated-february-2024.pdf?sfvrsn=7c9dc5bb\\_3](https://www.cuanschutz.edu/docs/cuanschutzhumanresourceslibraries/talent-acquisition-and-compensation/equal-pay-for-equal-work-act---guidance-updated-february-2024.pdf?sfvrsn=7c9dc5bb_3)

**Step 3: 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.

**Step 4: Classification Updates HCM:** Classification will update Position Information (if applicable) and create/approve a non-person profile (NPP) in HCM.

**Step 5: 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.



**Step 6: BP Creates Addendum Letter:** Business Partner (BP) will draft an Addendum Letter of Offer and email a copy to the Classification Consultant.

**Hyperlink will take you to Letter of Offer Template Library:**

<https://www.cuanschutz.edu/offices/human-resources/hr-business-partners/offer-letter-templates>

**Step 7: 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:**

<https://app.smartsheet.com/b/form/adc3d96d9e12400a8993813e0371f25f>

**Step 8: 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 and 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](mailto:hr.recruiting@cuanschutz.edu).

**Hyperlink will take you to the HCM Pay Rate Change Guide:** <https://www.cu.edu/docs/sbs-entering-job-changes-data-changes-and-pay-rate-changes>

**Step 9: BP Announces Promotion:** Business Partner (BP) will announce promotion within 30 day window outlined by the University's Equal Pay for Equal Work Guidance -

<https://www.cu.edu/docs/sbs-hiring-employee>

**Quick Tips:**

- (1) Employee will remain in the same position number, but will move to a new job code.
- (2) HRBPs can track the progress of their request at any time using the Salary Adjustment/Promotion Dynamic View - <https://app.smartsheet.com/dynamicview/views/39eeec6d-4267-4287-8c94-efb95455255b>
- (3) \*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 - <https://www.cuanschutz.edu/offices/bpcs/budget/second-level-approval>

SOM Only:

A Natural Progression Promotion Request Form is required for all promotion or salary adjustment requests - <https://app.smartsheet.com/b/form/e86017d029ce4e97bea6ebfa0e7d8dce>

## University Staff In-Range Salary Adjustment Process Guide

**Step 1: 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 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:**

<https://app.smartsheet.com/b/form/544a62c3d6a14020a5e72fceed78d89>

**Step 2: Classification Evaluates Promotion Request:** Classification will review request and formally 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** 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*

**Hyperlink will take you to the revised Equal Pay for Equal Work Posting Guidance:**

[https://www.cuanschutz.edu/docs/cuanschutzhumanresourceslibraries/talent-acquisition-and-compensation/equal-pay-for-equal-work-act---guidance-updated-february-2024.pdf?sfvrsn=7c9dc5bb\\_3](https://www.cuanschutz.edu/docs/cuanschutzhumanresourceslibraries/talent-acquisition-and-compensation/equal-pay-for-equal-work-act---guidance-updated-february-2024.pdf?sfvrsn=7c9dc5bb_3)

**Step 3: 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.

**Step 4: Classification Updates HCM:** Classification will update Position Information (if applicable) and create/approve a non-person profile (NPP) in HCM.

**Step 5: 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.

**Step 6: BP Creates Addendum Letter:** Business Partner (BP) will draft an Addendum Letter of Offer and email a copy to the Classification Consultant.

**Hyperlink will take you to the Letter of Offer Template Library:**

<https://www.cuanschutz.edu/offices/human-resources/hr-business-partners/offer-letter-templates>

**Step 7: 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:**

<https://app.smartsheet.com/b/form/adc3d96d9e12400a8993813e0371f25f>

**Step 8: 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. \*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](mailto:hr.recruiting@cuanschutz.edu).

**Hyperlink will take you to the HCM Pay Rate Change Guide:** <https://www.cu.edu/docs/sbs-entering-job-changes-data-changes-and-pay-rate-changes>

**Quick Tips:**

- (1) Employee will remain in the same position number and job code.
- (2) HRBPs can track the progress of their request at any time using the Salary Adjustment/Promotion Dynamic View - <https://app.smartsheet.com/dynamicview/views/39eeec6d-4267-4287-8c94-efb95455255b>
- (3) \*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 - <https://www.cuanschutz.edu/offices/bpcs/budget/second-level-approval>

SOM Only:

A Natural Progression Promotion Request Form is required for all promotion or salary adjustment requests - <https://app.smartsheet.com/b/form/e86017d029ce4e97bea6ebfa0e7d8dce>

## University Staff Update Only Process Guide

**Step 1: BP Enters Smartsheet Request:** Business Partner (BP) enters a request using the Smartsheet Transaction Center. Step-by-Step Instructions on how to complete an 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:***

<https://app.smartsheet.com/b/form/544a62c3d6a14020a5e72fceed78d89>

**Step 2: 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

**Step 3: Classification Updates HCM:** Classification will update Position Information (if applicable) and create/approve a non-person profile (NPP) in HCM.

### **Quick Tips:**

- (1) Employee will remain in current position number. No change in job code or compensation.
- (2) HRBPs can track the progress of their request at any time using the Update Only Dynamic View - <https://app.smartsheet.com/dynamicview/views/9dfde98a-a9a4-4f87-84be-edfad6f3de48>