

UCF PageUp Reference Guide





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Overview

Overview

PageUp, provides an enhanced candidate experience from application to onboarding. PageUp, delivers a set of tools for managing job postings and applicant information. In addition, interviews and other events can be scheduled, offers can be initiated and tracked, and employee onboarding can be managed, all in one location. during and after the hiring process. It provides oversight into the numerous organizational units and empowers teams to organize and monitor a large volume of postings and applicants.

The Hiring Manager and Staffing Coordinator roles will have the main responsibilities of a job posting and by default, will receive all system-automated emails. The Hiring Managers and Staffing Coordinators can complete the following tasks within PageUp:

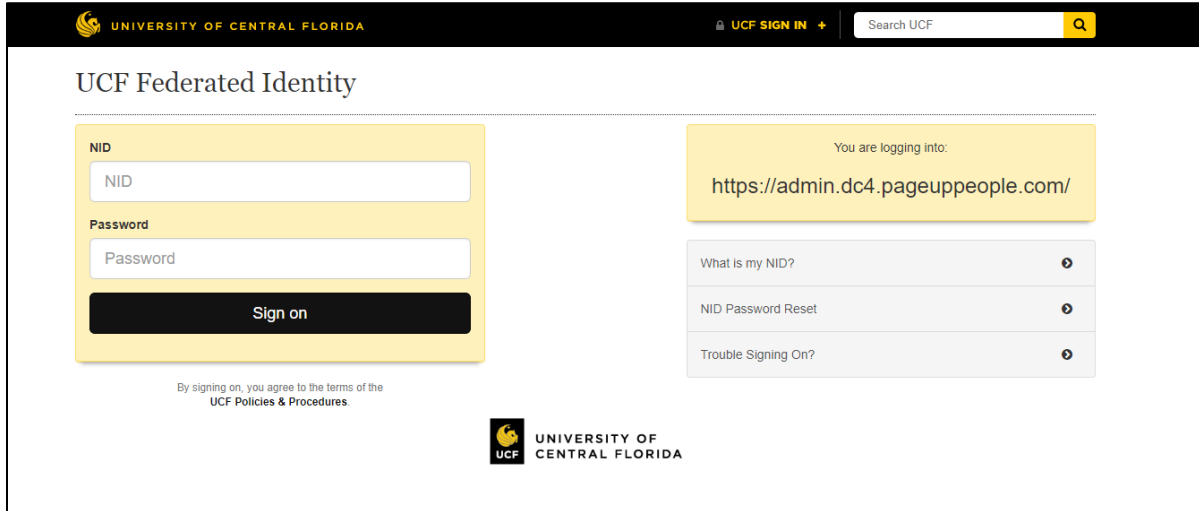
- Review and manage job postings and their statuses
- Manage and communicate with applicants
- Schedule interviews and other events
- Check applicant's references
- Create offers
- Manage employee onboarding tasks

General Navigation

General Navigation

Access the PageUp System

To access the PageUp System, click on ucf.pageuppeople.com

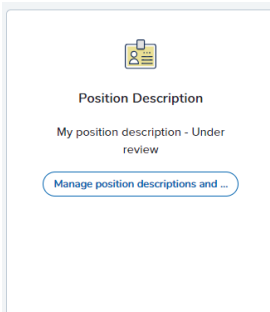
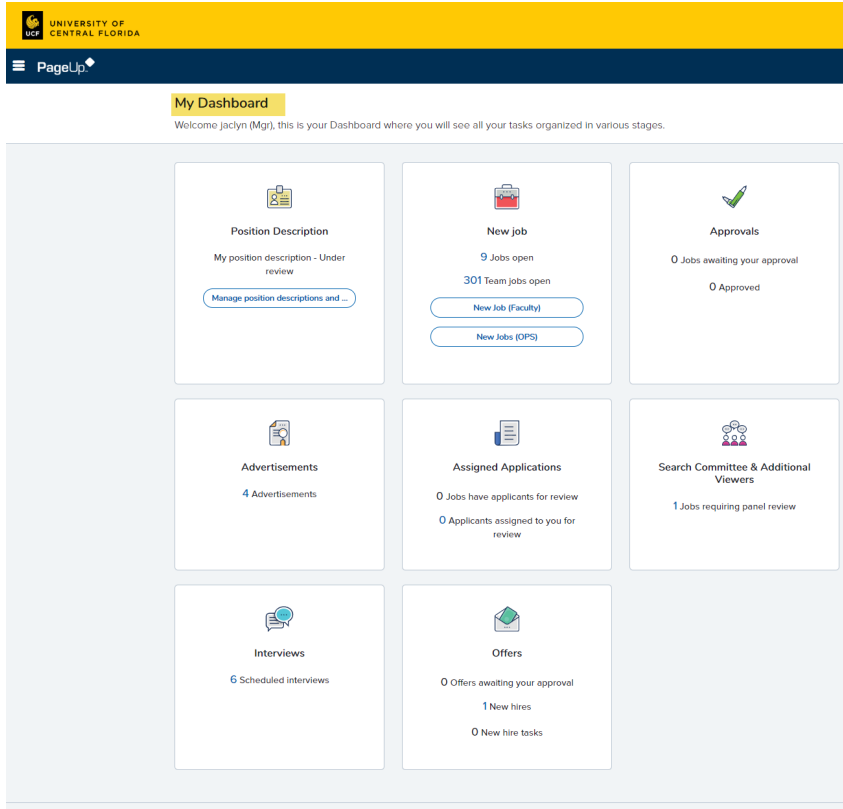


User Types

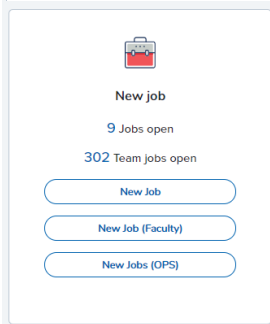
- Hiring Manager
 - Access to submit a requisition and hiring documents to Staffing Coordinator
 - Ability to update the applicant's status
- Staffing Coordinator (HR Liaison)
 - Ability to submit a requisition and hiring documents
 - Ability to edit a requisition and hiring documents
 - Ability to approve or decline a requisition or hiring documents
 - Ability to update the applicant's status
- Executive Approver
 - Access to view a requisition and hiring documents
 - Ability to approve or decline a requisition or hiring documents
- Search Committee & Additional Viewers (aka Guest users)
 - Access to view applicants
 - Ability to provide feedback/responses
 - Access to view job
 - Search Chair has ability to view committee responses

Definitions

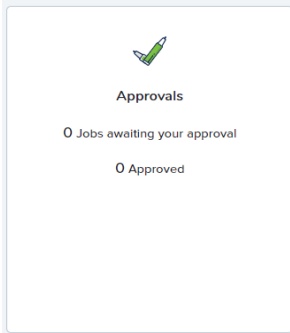
- **My Dashboard**
 - The homepage display of workflow task tiles based on what functionality a user has access to.



Position Description Task Tile allows you search for USPS and A & P positions to create a posting.

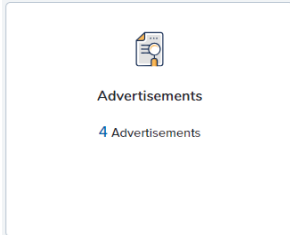


New Job Task Tile allows you to view the number of jobs open, the number of team jobs open, and you can create a posting for Faculty and OPS groups.



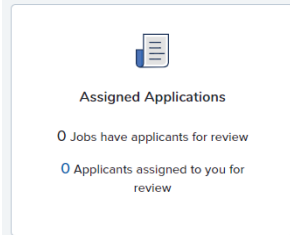
Approvals
0 Jobs awaiting your approval
0 Approved

Approvals Task Tile allows you to view the number of job cards awaiting your approval and the number of job cards you have approved.



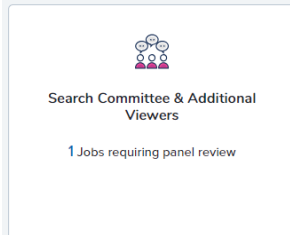
Advertisements
4 Advertisements

Advertisements Task Tile allows you to view a list of your jobs active on the UCF Careers Portal.



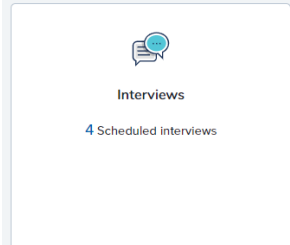
Assigned Applications
0 Jobs have applicants for review
0 Applicants assigned to you for review

Assigned Applications Task Tile allows you to view assigned jobs and applicants to you for review. This may be used when seeking feedback about an applicant from another user.



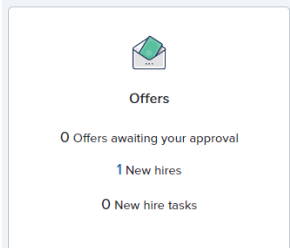
Search Committee & Additional Viewers
1 Jobs requiring panel review

Search Committee & Additional Viewers Search Committee & Additional Viewers Task Tile allows you to view positions for committees you are serving. Additional viewers are the same as guest user access



Interviews
4 Scheduled interviews

Interview Task Tile allows you to view the number of scheduled interviews if utilizing the events function in PageUp.

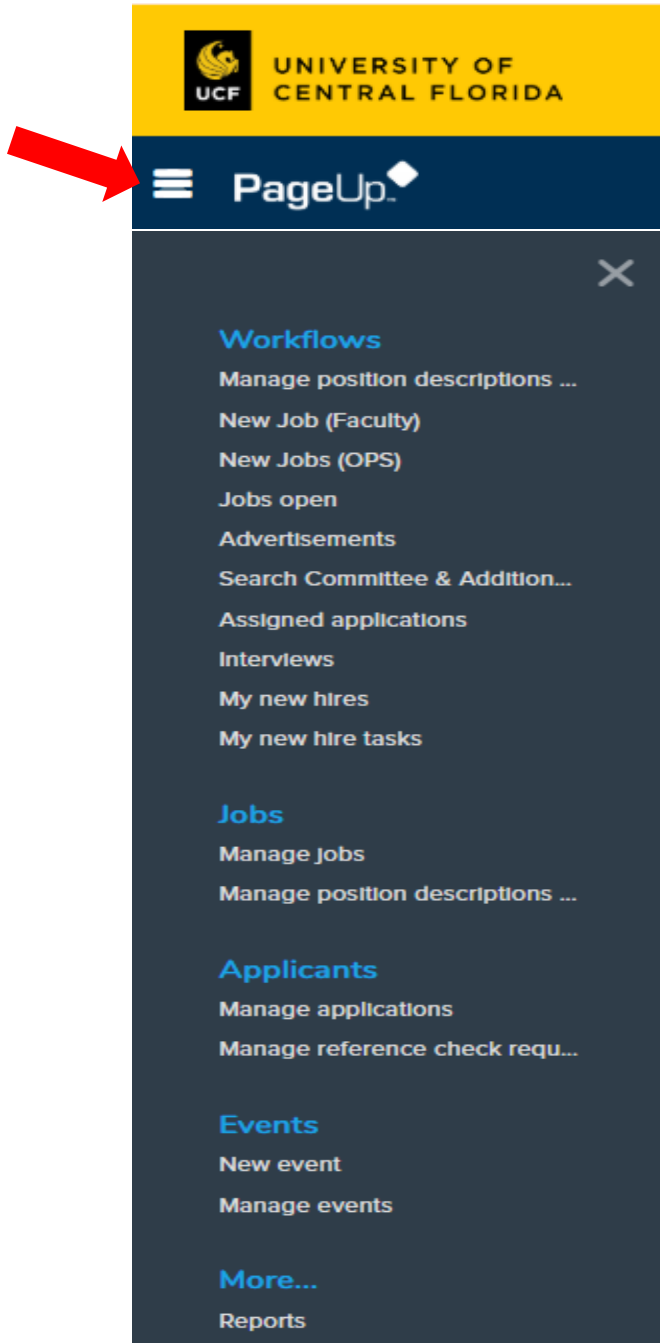


Offers
0 Offers awaiting your approval
1 New hires
0 New hire tasks

Offers Task Tile allows you to view the number of offers awaiting your approval. The number of your new hires and the number of your new hire tasks.

Main menu

- The Menu is grouped into subheadings. It allows the user access to different areas of the system.



- **Agreement and Clauses**
 - Agreement and clauses are specific provision aimed at clearly defining the duties, rights and privileges that each party has under the contract terms.
- **Alternate Onboarding Delegate**
 - An alternate person who can assist with the onboarding of new employees.
- **Applicant Card**
 - The applicant card is a complete summary of an applicant in the system, including their personal details and application history.
- **Applicant Flags**
 - Flags granted by the Talent department after review.

Applicant flags:

- ✔ Veteran's Preference
- ✘ Ineligible for Rehire

Application flags:

- 🚩 Recall preference
- ✔ USPS preference
- ✦ Written notice preference

- **Application & Forms**
 - Enables quick review of the applicants resume, attachments, application and other documents.
- **Application Statuses**
 - These are pre-defined statuses that are required for the hiring process to function correctly. For example: Incomplete, Submitted, New, Withdrawn, Removed, Ineligible, Offer made, Offer accepted, and Offer declined.
- **Booking an event**
 - Booking an event sets up time slots and invites the appropriate applicant to book themselves in at their preferred time. These approved events are then able to be entered into the Hiring Manager's Outlook calendar, streamlining the process.
- **Bulk Actions**
 - Bulk activities are actions that can be performed on multiple applicants simultaneously, saving you time.
- **Document library**
 - A library of documents used in the recruitment process.
- **History Items**
 - The applicant History can be filtered to display only certain items (such as notes, applications, and communications) and can be filtered further to only display history relating to a specific Job application. These filters can be used simultaneously.
- **Internal Personal Data Form**
 - Form used for current UCF Employees - internal moves.

- **Job Card**
 - Job Card creates a requisition that you utilize to advertise a position. The job card contains the following tabs:
 - Position Info
 - Notes
 - Documents
 - Reports
- **Manage Application screen**
 - The Manage applications screen is the primary screen used to search, view and sort a job's applicants.
- **Manage Jobs screen**
 - From this screen you can:
 - Search, view, edit and close jobs (within your permissions)
 - View job costs (using the dollar sign icon)
 - Click on the desired column headers to sort information
 - Use search criteria to find a specific job
 - View applications associated with jobs
- **Mandatory Fields**
 - Mandatory fields are flagged with a star. These must be completed when filling in a screen.
- **Merge document**
 - When you merge a document, you are automatically merging items from the offer card onto the offer letter/welcome letter.
- **Offer Card**
 - The offer card is typically the first point for initiating an offer process for an applicant. You will begin the offer card when creating the hire documents.
- **Onboarding Delegate**
 - The person responsible for the onboarding documents that allow for the effective onboarding of new employees.
- **Originator**
 - The individual who initiated the job card and/or offer card for approval.
- **Personal Data Form**
 - Form used for International Only candidates.
- **Personal Data Form Domestic**
 - Form used for new hires and hires of previous employees with a break in service.
- **Position Description**
 - A Position Description summarizes the important functions of a specific job. It represents actual duties, responsibilities and job specifications. You will use PD task tiles for A&P and USPS positions.
- **Posting number**
 - The posting number refers to the requisition number. The system will automatically create the posting number. You will utilize the posting number for most searches.










- **Recruitment process**
 - Recruitment processes define the steps that applicants will progress through once they have applied for a job.
- **Referees**
 - Referee names and contact information provided by the candidate via the application form to complete the reference check when requested.
- **Sub Department**
 - Sub Department is the smaller departments within the home department/division.
- **Sub Source**
 - Second ad or external sources.




Flags and Icons

Flags and Icons






There are many graphic indicators in the PageUp system designed to quickly provide you with information for the Recruitment process. When reviewing applications, you may see some of the following icon/flags.

Icons

	Grouping icon, you can assign candidate into one of three different groups to take action on. Will appear at the beginning of an applicant row under the Select drop down field on the Manage Applications screen.
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	Grouping icon, you can assign candidate into one of three different groups to take action on. Will appear at the beginning of an applicant row under the Select drop down field on the Manage Applications screen.
	View resume.
	Download resume.
	View application and forms.
	Quick view of job information.
	Edit.
	Notes

	Preview.
	Job costs can be recorded against a job by selecting the dollar sign on the Manage jobs screen.
	View applicants for job.

Flags

	Veterans' preference status granted by Talent.
	Ineligible for Rehire status granted by Talent.
	Recall preference status granted by Talent.
	USPS preference status granted by Talent.
	Written notice preference status granted by Talent.

Talent Network

Talent Network

A Talent Network is a tool for gathering applicants into your talent pipeline without the need for applying to a specific job. Applicants can be pre-screened and invited to apply for suitable jobs as they become available.

How is a Talent Network different from a job?

A job card is essentially a requirement for one or more specific positions, for example, a Business Analyst. Job cards can be raised by Hiring Managers, allocated to cost centers, linked to position descriptions and so forth. To allow for more proactive recruitment, Talent Networks allow applicants to register their interest for a range of roles before specific jobs become available. A Talent Network is used when an employer is casting a wide net to find a certain type of candidate. Perhaps they haven't nailed down the job role or roles they will be offering soon, but they do know the skills they'll need.

JOIN THE UCF TALENT NETWORK

Computer Support

We want you to be a part of the Knight Nation's tech community! If our current technical opportunities don't align with your employment goals, we would love to keep in touch through our Talent Network.

Applicants will fill out a brief form, shown below. The form will not constitute as a formal application.

Page 2 of 4: Personal Information

Are you 18 years or older?*

Are you legally able to work in the United States?*

What type of employment are you willing to accept? (Check all that apply)*

Full time Part time

Temporary

Have you previously worked for us in any capacity?*

Yes

No

No response

If yes, indicate days of employment*

Page 3 of 4: Join our Talent Network

What is your highest completed level of education?*

Please select up to three (3) areas of interest.*

<input type="checkbox"/> Administrative Support	<input type="checkbox"/> Advising
<input type="checkbox"/> Customer Service	<input type="checkbox"/> Facilities/Skilled Trade
<input type="checkbox"/> Finance/Accounting	<input type="checkbox"/> Human Resources
<input type="checkbox"/> Information Technology	<input type="checkbox"/> Instructional
<input type="checkbox"/> Law/ Enforcement	<input type="checkbox"/> Legal/Compliance
<input type="checkbox"/> Library	<input type="checkbox"/> Legal/Compliance
<input type="checkbox"/> Nursing	<input type="checkbox"/> Other
<input type="checkbox"/> Project Management	<input type="checkbox"/> Related Health Care Field

When looking at job boards, what positions/titles are you most interested in?*

If you are interested in utilizing the Talent Network and having access to the applicants, please email your point of contact. We plan to feature four to five talent networks roles at a time and each will be posted for a minimum of one month.

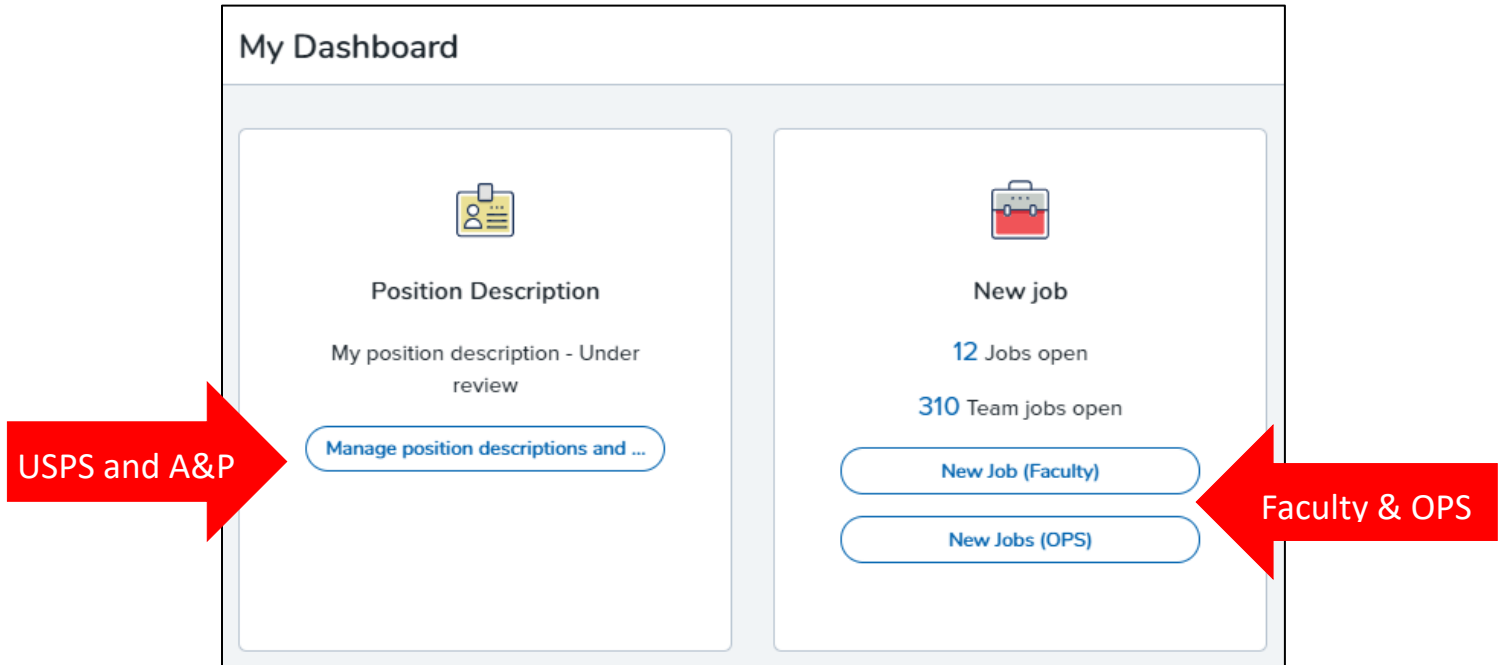
SUBMITTING A JOB CARD

Submitting a Job Card USPS and A&P

From *My Dashboard*

Select **Manage position descriptions** for USPS and A&P

Select the appropriate **New Job** for Faculty and OPS



1. To find position information for posting, you can use the following search fields. Then click **Search**.

Position Description							
PD No.	Classification Title	Functional/Administrative Title	Position Number	Job Code	Employee Name	Employee No.	
Supervisor Name	Work Type	Area	Department	Sub department	Approval status	Status	Clear Search

2. View the position to make sure no changes are needed before continuing.
Some information on the job card will auto populate from the job description and will not be editable. If the information is not accurate, please do not submit the job card but **stop here** and **reach out to Compensation** for reclassification.
3. Select the position you want to post by clicking on **Recruit for position**.

Position Description							
PD No.	Classification Title	Functional/Administrative Title	Position Number	Job Code	Employee Name	Employee No.	
Supervisor Name	Work Type	Area	Department	Sub department	Approval status	Status	Search
PD No.	Position Number	Job Code	Classification Title	Functional/Administrative Title	Employee Name	Supervisor Name	Date modified
PD-11	00036467	2603	HRIS Analyst Senior		Jamie Employee	Teresa Manager	19 Sep 2018
							Approval status
							Approved
							Recruit for position

NOTE: Required fields are marked with an asterisk* and must be completed to submit a job card.

USPS and A&P Position Information

NOTE: The following screens pertain to USPS and A&P fields. Faculty and OPS have much the same process; some fields differ. You can find instructions on Faculty and OPS toward the end of this reference guide.

1. **Classification Title:** This is the title that candidates will see in the posting.

POSITION INFORMATION

Job Code:* 🔍 ✎

No job code selected

Classification Title:*

2. **Job Summary/Basic Function:** Essential functions are the basic job duties that an employee must be able to perform. A generic job description will generate but the text box is editable.

Job Summary/Basic Function:*

3. **Additional Minimum Qualifications (PERM only):** When a U.S. employer sponsors a foreign worker for a green card (lawful permanent residence), the law usually requires the employer to complete a process known as labor certification, or "PERM."

Additional Minimum Qualifications (PERM only):

4. **Preferred Qualifications:** These qualifications include additional job-related education, experience, skills, competencies, and credentials desired but not mandatory.

Preferred Qualifications:*

5. **Special Conditions:** Special conditions of employment describe conditions (i.e., environment, safety, travel, hours outside of the traditional work week, etc.) unique to the position.
6. **Annual Salary:** Varies depending on job code.

Special Conditions:	
Annual Salary:*	

7. **Additional Application Materials:** Request of supplemental documents/information in addition to application

Additional Application Materials:	
--	--

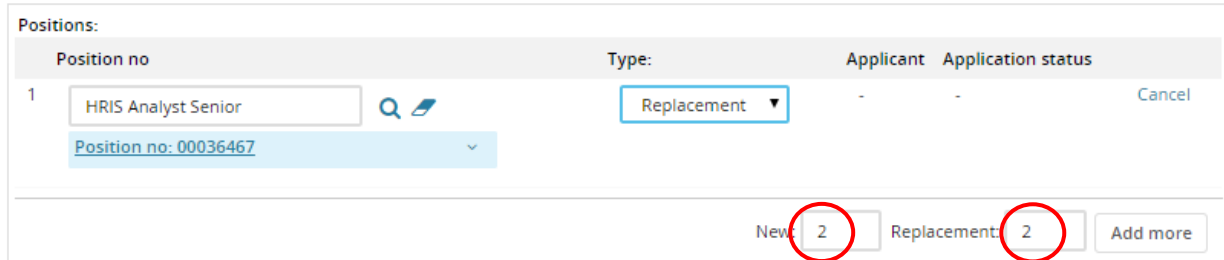
8. **Job Open Date:** The first Friday you want the position opened.
9. **Job Close Date:** The Thursday you want the position to close; or you may leave blank for **open until filled** option.

Job Open Date:*	14 Jan 2019
Position will be opened on Friday after approved	
Job Close Date:	<input type="text"/>

10. **Type of position:** Select from drop down: **New** or **Replacement**.

Positions:		Type:	Applicant	Application status
1	<input type="text" value="HRIS Analyst Senior"/> <input type="text" value="Position no: 00036467"/>	<div style="border: 1px solid #ccc; padding: 2px;"> Select ▼ Select New Replacement </div>		Cancel
		New: <input type="text"/>	Replacement: <input type="text"/>	<input type="button" value="Add more"/>

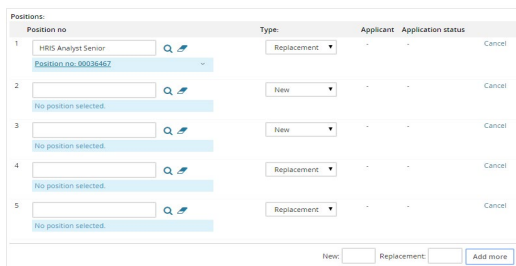
- a. If you are submitting a job card for a *Pool* advertisement you will enter the appropriate number of positions in the *New/Replacement* field and click **Add more**.



Position no	Type:	Applicant	Application status
1 HRIS Analyst Senior Position no: 00036467	Replacement	-	-

New: Replacement: Add more

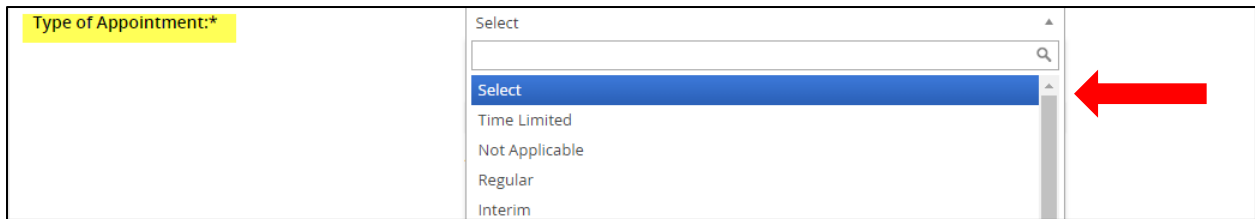
- b. Position numbers are required to submit job card for approval. All position titles must be the same.



Position no	Type:	Applicant	Application status
1 HRIS Analyst Senior Position no: 90036467	Replacement	-	-
2 No position selected	New	-	-
3 No position selected	New	-	-
4 No position selected	Replacement	-	-
5 No position selected	Replacement	-	-

New: Replacement: Add more

11. Type of Appointment: Select from drop down menu.



Type of Appointment:*

Select

- Select
- Time Limited
- Not Applicable
- Regular
- Interim

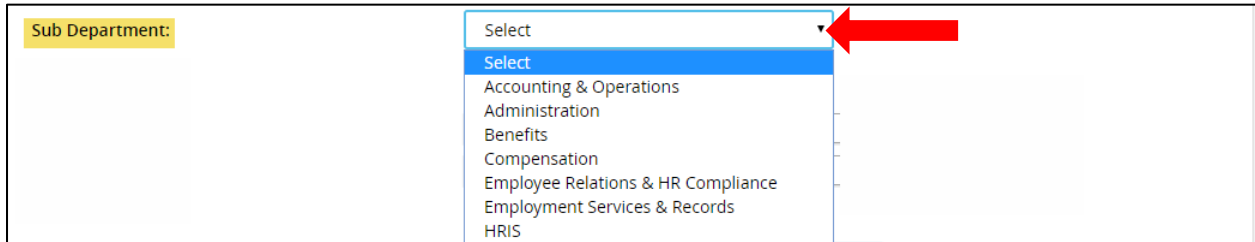
12. FTE Examples:

- 1.0 (40 hours)
- .75 (30 hours)
- .50 (20 hours)
- .25 (10 hours)




FTE: *

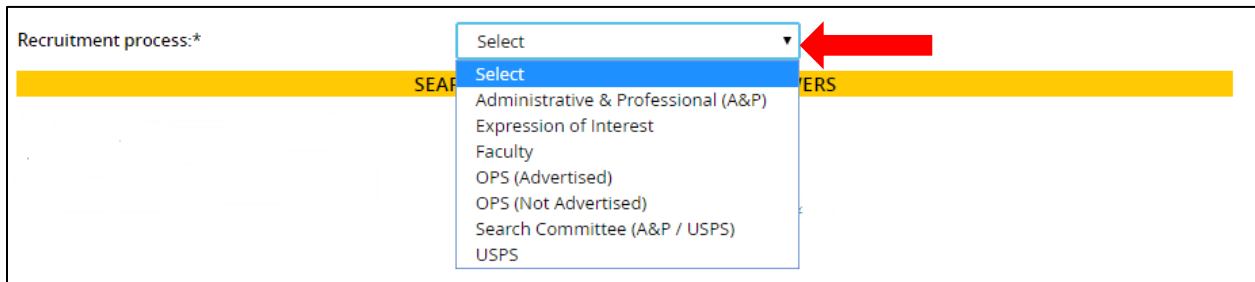
13. **Sub Department:** Select from drop down menu. Contact Talent Acquisition if sub department is not listed.



14. **Work Schedule:** Example - Monday to Friday from 8 AM to 5 PM.



15. **Recruitment process:** Select from drop down menu.

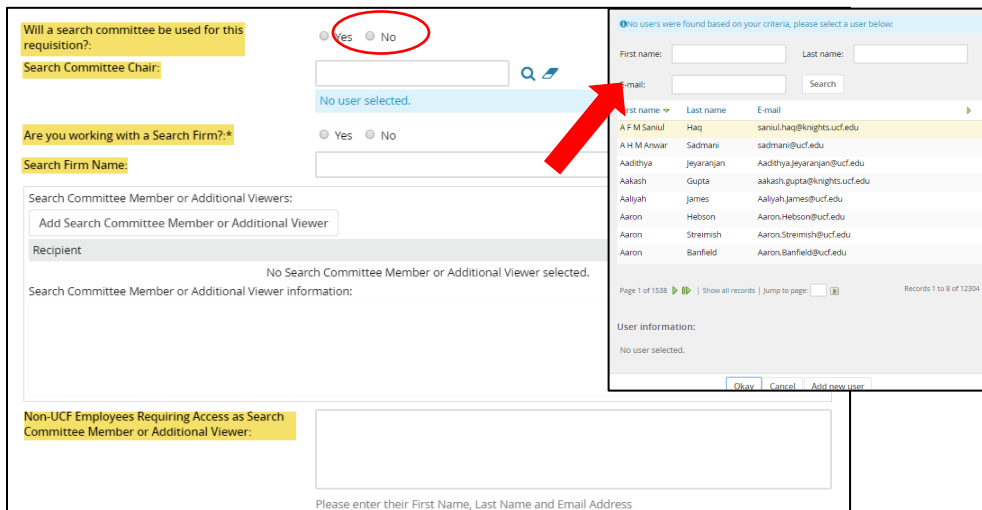


a. Select **Search Committee (A&P / USPS)** if you are using a Search Committee.

USPS and A&P Search Committee & Additional Viewers

(Additional Viewers previously known as Guest Users.)

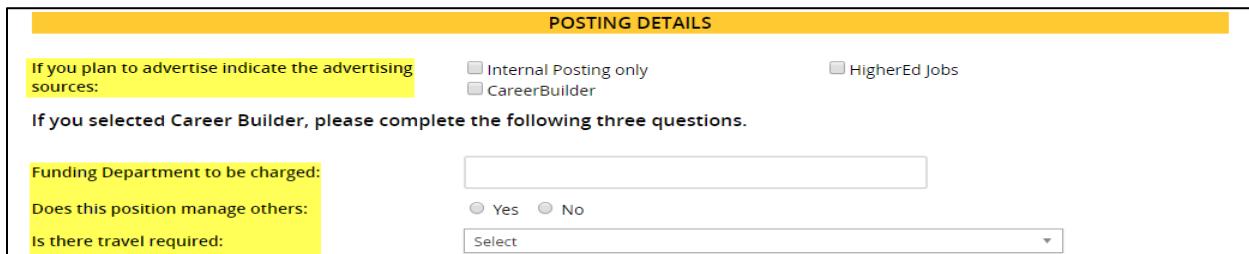
1. Select **YES** or **NO**
2. If **YES** add *Search committee chair* and *Search Committee Member(s)* or *Additional Viewer(s)*.
 - a. In order to utilize the lookup function the Chair and Member(s) must be active in PeopleSoft. Search by first name, last name, or email address.
 - b. Note: Allow pop-ups to open in your browser settings to search for name.
 - c. Name search will be actual employee name, **no nicknames**.
3. Answer if using a Search Firm and include name of firm if you are.
4. For *Search Committee Members* or *Additional Viewer(s)* who are not UCF employees to access the system, enter the following information in the *Non-UCF Employees Requiring Access* text box:
 - a. **First Name, Last Name, and E-mail.**



USPS and A&P Posting Details

Make appropriate selection(s) for ad source.

1. Internal Posting only is for UCF internal candidates only, CareerBuilder and/or HigherEd Jobs
2. If you are advertising the position on CareerBuilder website, fill out the following:
 - a. *Funding Department to be charged*
 - b. *Does the position manage others – Yes or No.*
 - c. If there is *travel required- select* one from drop down menu.



3. List any other external sources you are using for the position in text box provided. Field is a required field; **enter N/A** if no additional sources.
4. Include Additional Posting Instructions in text box provided – Information for approvers and/or Talent Acquisition (not for applicants). If you have a **video link**, **enter the URL** in this box.


Please list any other sources:

Include Additional Posting Instructions:

5. **Posting Location:** Please **select** one from drop down menu.
 - a. *Posting location* selected here is where the position will be categorized in the *UCF Careers* page.

Posting Location:*

Select
 Select
 Main Campus (Orlando)
 UCF Rosen Col - Universal Blvd
 UCF Downtown
 UCF HSC at Lake Nona



6. **Posting Introductory Sentence:** Please **enter a brief description** as an introduction to the job details.



Posting Introductory Sentence:

Please enter one sentence as an introduction to the job details.

USPS and A&P Users and Approvals



1. *HR's Point of Contact by College/Division* is attached for reference.
2. **View Only Department Delegate: (Optional)** – This role can be assigned on the job card to allow someone **who is not an approver** view only access (Must be active in PeopleSoft).
3. **Funding Department:** Utilize **lookup** function to identify funding department to be charged for background screening.
4. **Hiring Manager:** Will default to job card initiator. **Make sure that the actual hiring official is listed.** This may require replacing the auto-populated name in this field.

View Only Department Delegate:

No user selected.



Funding Department Code for Background Screen:

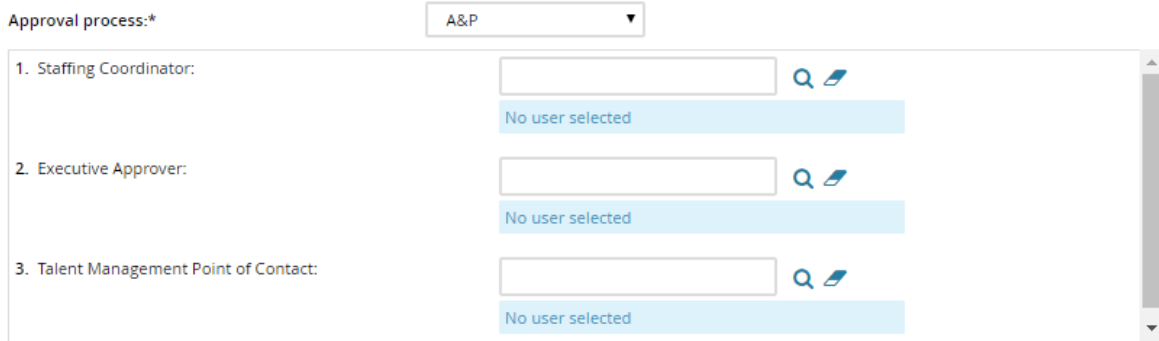
No Funding Department Code for Background Screen selected

Hiring Manager field will default to job card originator, if needed please make appropriate change to actual hiring manager.

Hiring Manager:*

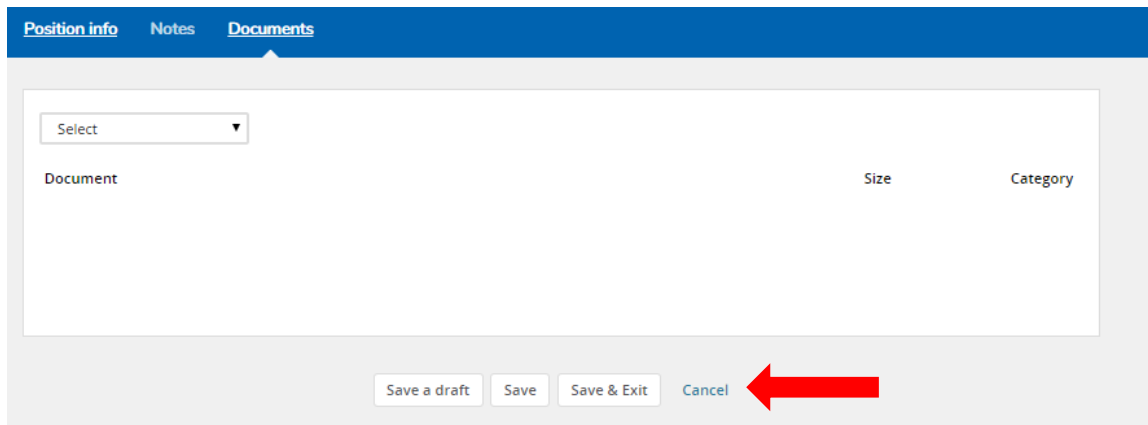
5. **Approval process:** *Select* from drop down menu – for example, *A&P*.



6. **Select** appropriate *Point of Contact* for each approver role.

- a. *Staffing Coordinator* – Actions allowed:
 - Update job details on job card
 - Approve or decline a job card
 - Update applicant status
- b. *Executive Approver* – Actions allowed:
 - Access to read-only a job card (requisition)
 - Approve or decline a job card
- c. *Talent Management Point of Contact*

Next page: You can **add notes** and/or **upload documents**.




Save a draft: Allow you to **save but not submit** the job card for approval.

Save: **Saves and submits** job card for approval workflow.

Save & Exit: **Saves and submits job** card for approval workflow. **Page closes** and brings you back to PageUp *My Dashboard* home page.

Cancel: **Cancels and deletes** information entered.

Submitting a Job Card Faculty

Select **New Jobs (Faculty)** from My Dashboard, then click  to search for position number. Once you have the position you want to advertise, click on select, then click next.

FACULTY

If this opening requires a Position Number, please select it from below.

1. Position

No position selected

No items were found based on your criteria, please select an item below:

Title	Number	Position no	
assistant professor			
Assistant Professor	00030043		Select
Assistant Professor	00030044		Select
Assistant Professor	00030048		Select
Assistant Professor	00038970		Select
Assistant Professor	00038100		Select



Faculty Position Information

- Classification Title:** This is the title that candidates will see in the posting.
- Administrative Title:** Add administrative title if position will have an administrative function.

Classification Title:*

Administrative Title:

- Job Summary/Basic Functions:** Essential functions are the basic job duties that an employee must be able to perform. A generic job description will generate but the text box is editable.

Job Summary/Basic Function:*

- Minimum Qualifications:** The minimum amounts of education or experience and the minimum level of knowledge, skills, abilities, licensures, certifications and other job-related requirements that must be met for a candidate to be considered for this position.
- Preferred Qualifications:** These qualifications include additional job-related education, experience, skills, competencies, and credentials desired but not mandatory.
- Special Conditions:** Special conditions of employment describe conditions (i.e., environment, safety, travel, hours outside of the traditional work week, etc.) unique to the position.

Minimum Qualifications:*

Preferred Qualifications:*


Special Conditions:

7. **Annual Salary:** Varies depending on job code.
8. **Additional Application Materials:** Supplemental documents/information in addition to application, such as: professional statement of research interest, evidence of excellence, list of affiliations, three professional references, etc.


Annual Salary:*

Additional Application Materials:

9. **Job Open Date:** The first Friday you want the position opened.
10. **Job Close Date:** The Thursday you want the position to close; or you may leave blank for open until filled option.



Job Open Date:* 

Position will be opened on Friday after approved

Job Close Date: 




11. **Type of position:** Select from drop down: New or Replacement.











Positions:

Position no	Position	Type:	Applicant	Application status	
1	Assistant Professor  	Select ▼	-	-	Cancel
<div style="border: 1px solid lightblue; padding: 2px; margin-bottom: 5px;">Position no: 00030043 ▼</div>					
New: <input style="width: 40px;" type="text"/> Replacement: <input style="width: 40px;" type="text"/> <input type="button" value="Add more"/>					

- a. If you are submitting a job card for a Pool advertisement you will enter the appropriate number of positions in the New/Replacement field and click **Add more**. Position numbers are required to submit job card for approval.

Positions:

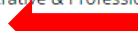
Position no	Position	Type:	Applicant	Application status	
1	Assistant Professor  	Select ▼	-	-	Cancel
<div style="border: 1px solid lightblue; padding: 2px; margin-bottom: 5px;">Position no: 00030043 ▼</div>					
New: <input style="width: 40px; border: 2px solid red;" type="text" value="2"/> Replacement: <input style="width: 40px; border: 2px solid red;" type="text" value="2"/> <input type="button" value="Add more"/> 					

Positions:					
Position no		Type:	Applicant	Application status	
1	Assistant Professor   Position no: 00030043	Select	-	-	Cancel
2	<input type="text"/>   No position selected.	New	-	-	Cancel
3	<input type="text"/>   No position selected.	New	-	-	Cancel
4	<input type="text"/>   No position selected.	Replacement	-	-	Cancel
5	<input type="text"/>   No position selected.	Replacement	-	-	Cancel

New: Replacement: [Add more](#)

12. **Work Type:** Please select Faculty from drop down menu.

Work Type:*

- Select
- Select
- USPS (Staff)
- Administrative & Professional Faculty 
- OPS (Temporary)
- Postdoctoral Associate

13. **Type of Appointment:** Select from drop down menu.

Type of Appointment:*

- Select
- Select
- USPS Time Limited
- Regular
- Interim
- Visiting - 1 year non-renewable
- Visiting - renewable
- Exempt from Posting
- Provisional
- Adjunct Faculty
- Clinical

14. FTE Examples:

- 1.0 (40 hours)
- .75 (30 hours)
- .50 (20 hours)
- .25 (10 hours)

FTE:*

15. Tenure Status: Select from drop down menu.

Tenure Status:

- Select
- Tenure Track
- Tenured/Tenure Earned
- N/A
- Non-Tenure Earning
- Tenure Earning
- Tenured
- Multi-year Appointment

16. Sub Department: Select from drop down menu. If you do not see your Area, please contact your Talent point of contact.

Sub Department:

- Select
- Sociology

17. Work Schedule: Example - Monday to Friday from 8 AM to 5 PM.

Work Schedule:

18. Recruitment Process: Select from drop down menu. Faculty process is a Search Committee recruitment process

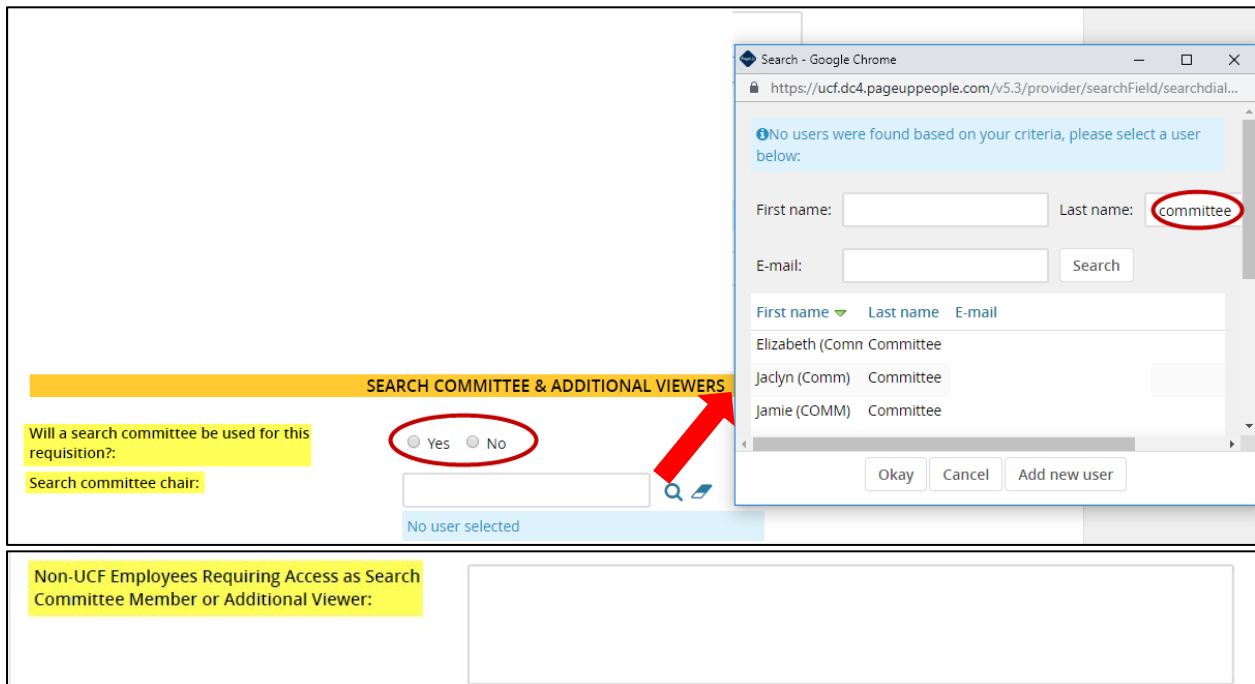
Recruitment Process:*

- Select
- Administrative & Professional (A&P)
- Expression of Interest
- Faculty
- OPS (Advertised)
- OPS (Not Advertised)
- Search Committee (A&P / USPS)
- USPS

Faculty Search Committee & Additional Viewers

(Additional Viewers were previously known as Guest Users.)

1. Select **YES**
2. If **YES** add *Search committee chair* and *Search Committee Member(s)* or *Additional Viewer(s)*.
 - a. In order to utilize the lookup function the Chair and Member(s) must be active in PeopleSoft. Search by first name, last name, or email address.
 - b. Note: Allow pop-ups to open in your browser settings to search for name.
 - c. Name search will be actual employee name, **no nicknames**.
3. Are you working with a Search Firm: Yes or No, if yes add the name of the firm(s).
4. For *Search Committee Members* or *Additional Viewer(s)* who are not UCF employees to access the system, enter the following information in the *Non-UCF Employees Requiring Access* text box: **First Name, Last Name, and E-mail**.



SEARCH COMMITTEE & ADDITIONAL VIEWERS

Will a search committee be used for this requisition?: Yes No

Search committee chair:

No user selected

Non-UCF Employees Requiring Access as Search Committee Member or Additional Viewer:

Search - Google Chrome
 https://ucf.dc4.pageuppeople.com/v5.3/provider/searchField/searchdial...
 No users were found based on your criteria, please select a user below:
 First name: Last name:
 E-mail: Search
 First name Last name E-mail
 Elizabeth (Comn Committee
 Jaclyn (Comm) Committee
 Jamie (COMM) Committee
 Okay Cancel Add new user

Faculty Posting Details

Make appropriate selection(s) for ad source.

1. *Internal Posting only* is for UCF internal candidates only.
2. If you are advertising the position on CareerBuilder website, fill out the following:
 - a. *Funding Department to be charged*
 - b. *Does the position manage others* – **Yes** or **No**.
 - c. If there *is travel required*- **select** one from drop down menu.

POSTING DETAILS

If you plan to advertise indicate the advertising sources: Internal Posting only CareerBuilder HigherEd Jobs

If you selected Career Builder, please complete the following three questions.

Funding Department to be charged:

Does this position manage others: Yes No

Is there travel required:

3. List any other external sources you are using for the position in text box provided. Field is a required field; enter N/A if no additional sources.
4. Include Additional Posting Instructions in text box provided – Information for approvers and/or Academic Affairs or Talent Acquisition (not for applicants). If you have a video link, enter the URL in this box.

Please list any other sources:

Include Additional Posting Instructions:

5. Posting Location: Please select one from drop down menu.
 - a. Posting location selected here is where the position will be categorized in the UCF Careers page.

Posting Location:*

- Select
- Select
- Main Campus (Orlando)
- UCF Rosen Col - Universal Blvd
- UCF Downtown
- UCF HSC at Lake Nona

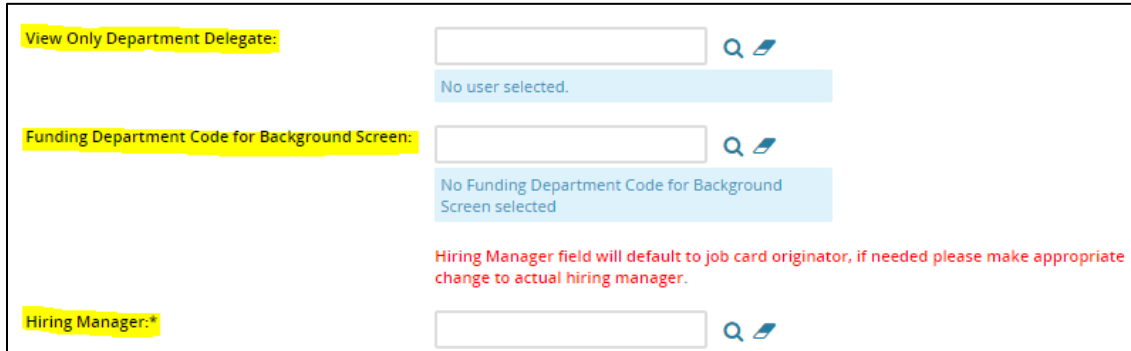
6. **Posting Introductory Sentence:** Please **enter a brief description** as an introduction to the job details.

Posting Introductory Sentence:

Please enter one sentence as an introduction to the job details.

Faculty Users and Approvals

1. *HR's Point of Contact by College/Division* is attached for reference.
2. **View Only Department Delegate: (Optional)** – This role can be assigned on the job card to allow someone **who is not an approver** view only access (Must be active in PeopleSoft).
3. **Funding Department:** Utilize **lookup** function to identify funding department to be charged for background screening.
4. **Hiring Manager:** Will default to job card initiator. **Make sure that the actual hiring official is listed.** This may require replacing the auto-populated name in this field.

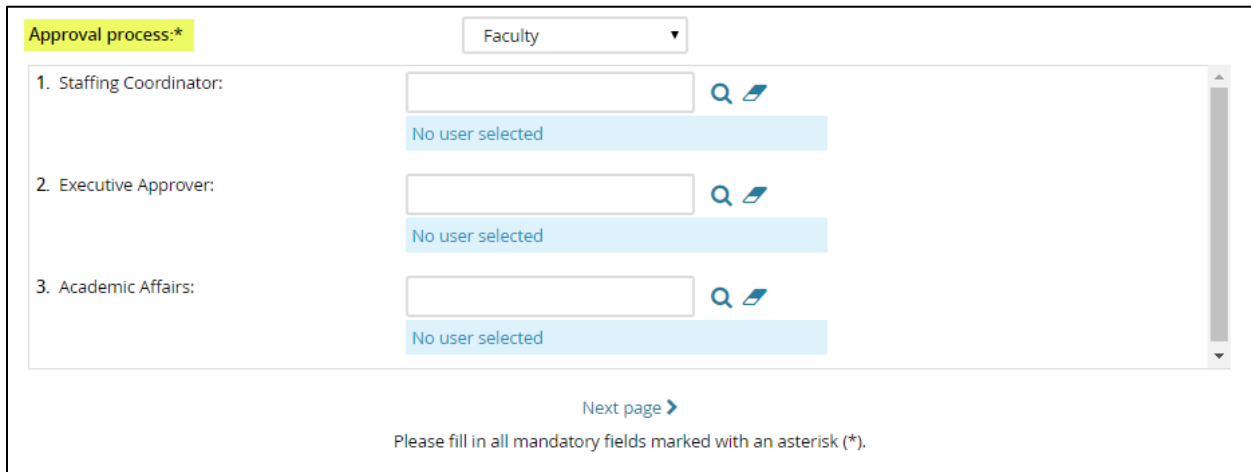


The screenshot shows three form fields with search icons:

- View Only Department Delegate:** A search box with the text "No user selected." below it.
- Funding Department Code for Background Screen:** A search box with the text "No Funding Department Code for Background Screen selected" below it.
- Hiring Manager:*** A search box.

Below the search boxes, there is a red text note: "Hiring Manager field will default to job card originator, if needed please make appropriate change to actual hiring manager."

5. **Approval process: Select** Faculty from drop down menu.



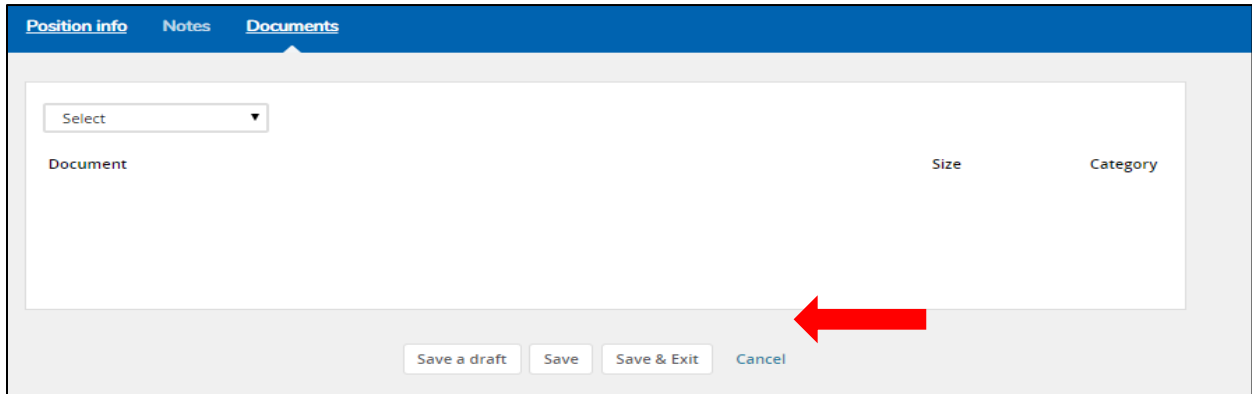
The screenshot shows the "Approval process:*" section with a dropdown menu set to "Faculty". Below the dropdown are three approver roles, each with a search box and a "No user selected" message:

1. Staffing Coordinator:
2. Executive Approver:
3. Academic Affairs:

At the bottom of the form, there is a "Next page >" button and a note: "Please fill in all mandatory fields marked with an asterisk (*)."

6. **Select** appropriate *Point of Contact* for each approver role.
 - a. *Staffing Coordinator* – Actions allowed:
 - Update job details on job card
 - Approve or decline a job card
 - Update applicant status
 - b. *Executive Approver* – Actions allowed:
 - Access to read-only a job card (requisition)
 - Approve or decline a job card
 - c. *Academic Affairs Point of Contact*

Next page: You can **add notes** and/or **upload documents**.



Save a draft: Allow you to **save but not submit** the job card for approval.

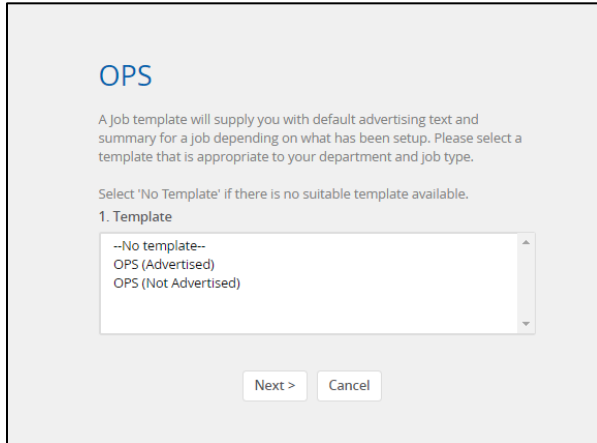
Save: **Saves and submits** job card for approval workflow.

Save & Exit: **Saves and submits job** card for approval workflow. **Page closes** and brings you back to PageUp *My Dashboard* home page.

Cancel: **Cancel and deletes** information entered.

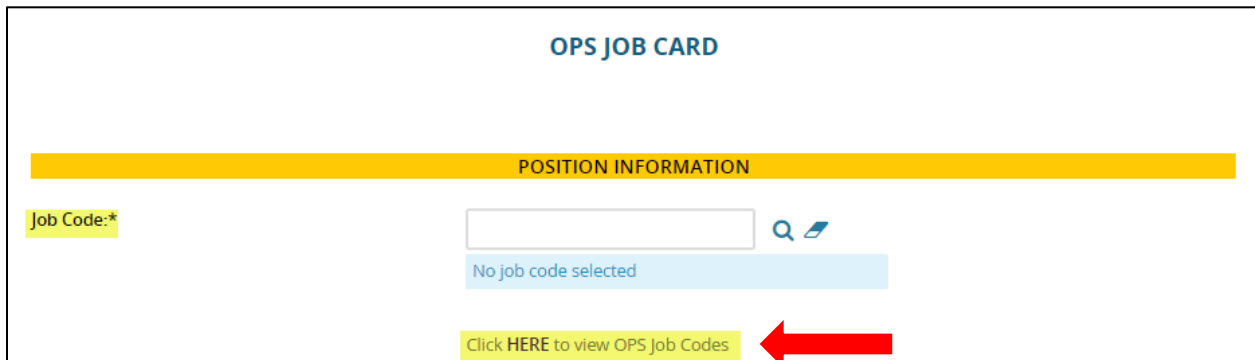
Submitting a Job Card OPS

Select **New Jobs (OPS)** from *My Dashboard*, then select a **Job Template** (OPS Advertised, or OPS Not Advertised).



OPS Position Information

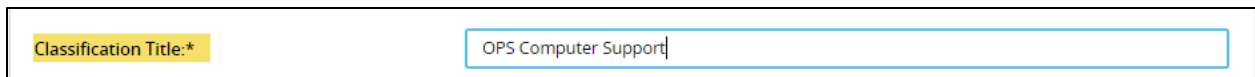
1. **Job Code:** Click on the OPS Job Codes. Once you determined the OPS classification and job code you must type it in the **Job Code** field.



2. **Position Number:** Copy and paste position number **00080100** – OPS Non-Exempt default position will appear on field.




3. **Classification Title:** Remove what is generated and add title. Title must have OPS as prefix. For example: OPS Administrative Support, OPS Computer Support.



4. **Job Summary/Basic Function:** Detail the specific requirements, responsibilities, job duties, and skills required to perform this role. It also includes a list of common day-to-day tasks, equipment or tools used, who the role reports to, and overall goals.

Job Summary/Basic Function:*	
------------------------------	--

5. **Minimum Qualifications:** The minimum amounts of education or experience and the minimum level of knowledge, skills, abilities, licensures, certifications and other job-related requirements that must be met for a candidate to be considered for this position.

Minimum Qualifications:*	Enter qualifications required for position
--------------------------	--

6. **Preferred Qualifications:** These qualifications include additional job-related education, experience, skills, competencies, and credentials desired but not mandatory.

Preferred Qualifications:*	
----------------------------	--

7. **Special Conditions:** Special conditions of employment describe conditions (i.e., environment, safety, travel, hours outside of the traditional work week, etc.) unique to the position.

Special Conditions:	
---------------------	--

8. **Hourly Rate:** The amount of money earned for every hour worked.



Hourly Rate:*	
---------------	--

9. **Additional Application Materials:** Request of supplemental documents/information in addition to application.

Additional Application Materials:	
-----------------------------------	--

10. **Job Open Date:** The first Friday you want the position opened.

11. **Job Close Date:** The Thursday you want the position to close; or you may leave blank for open until filled option.

Job Open Date:*	14 Jan 2019 
Position will be opened on Friday after approved	
Job Close Date:	<input type="text"/> 

10. **FTE Examples:**

- 1.0 (40 hours)
- .75 (30 hours)
- .50 (20 hours)
- .25 (10 hours)

FTE:*	<input type="text"/>
--------------	----------------------

11. **VP Area:** Make selection from drop-down menu.

12. **Home Department:** Make selection from drop-down menu.

13. **Sub Department:** Make selection from drop-down menu.



If you do not see your Area, please contact your Talent point of contact.

VP Area:*	Select ▼
Home Department:*	No Home Department found ▼
Sub Department:	No Sub Department found ▼

14. **Work Schedule:** Example - Monday to Friday from 8 AM to 5 PM.

Work Schedule:	<input type="text"/>
-----------------------	----------------------

15. **Work Location:** Place of work

Work Location:*	<input type="text"/>  
No Site name selected.	

OPS Posting Details

Make appropriate selection(s) for ad source.

1. *Internal Posting only* is for UCF internal candidates only.
2. If you are advertising the position on CareerBuilder website, fill out the following:
 - a. *Funding Department to be charged*
 - b. *Does the position manage others* – **Yes** or **No**.
 - c. If there is *travel required*- **select** one from drop down menu.

POSTING DETAILS

If you plan to advertise indicate the advertising sources:

Internal Posting only HigherEd Jobs
 CareerBuilder

If you selected Career Builder, please complete the following three questions.

Funding Department to be charged:


Does this position manage others: Yes No

Is there travel required:

3. **Include Additional Posting Instructions:** in text box provided Information for approvers and/or Talent Acquisition (not for applicants). If you have a video link, enter the URL in this box.

Include Additional Posting Instructions:

4. **Posting Location:** Please select one from drop down menu. Posting location selected here is where the position will be categorized in the UCF Careers page.

Posting Location:* 

Select

Select

Main Campus (Orlando)

UCF Rosen Col - Universal Blvd

UCF Downtown

UCF HSC at Lake Nona

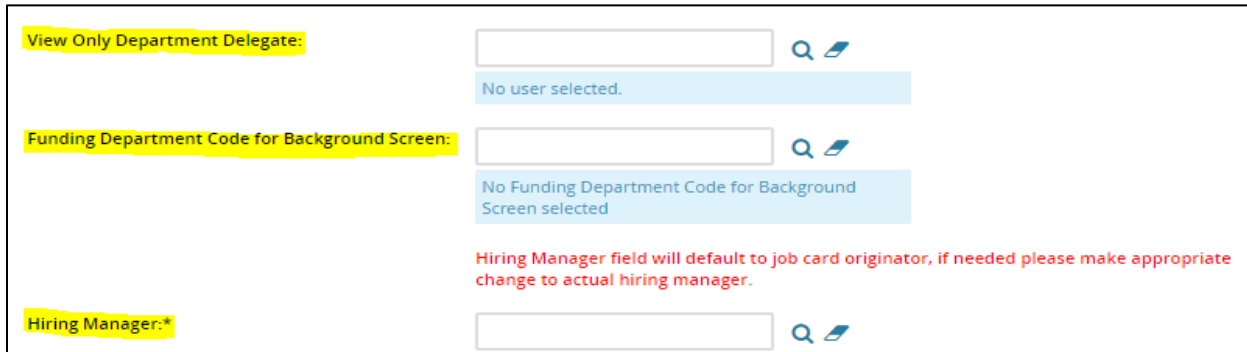
5. **Posting Introductory Sentence:** Please enter a brief description as an introduction to the job details.

Posting Introductory Sentence:

Please enter one sentence as an introduction to the job details.

OPS Users and Approvals

1. HR's Point of Contact by College/Division is attached for reference.
2. **View Only Department Delegate:** (Optional) – This role can be assigned on the job card to allow someone who is not an approver view only access (Must be active in PeopleSoft).
3. **Funding Department:** Utilize lookup function to identify funding department to be charged for background screening.
4. **Hiring Manager:** Will default to job card initiator. Make sure that the actual hiring official is listed. This may require replacing the auto-populated name in this field.



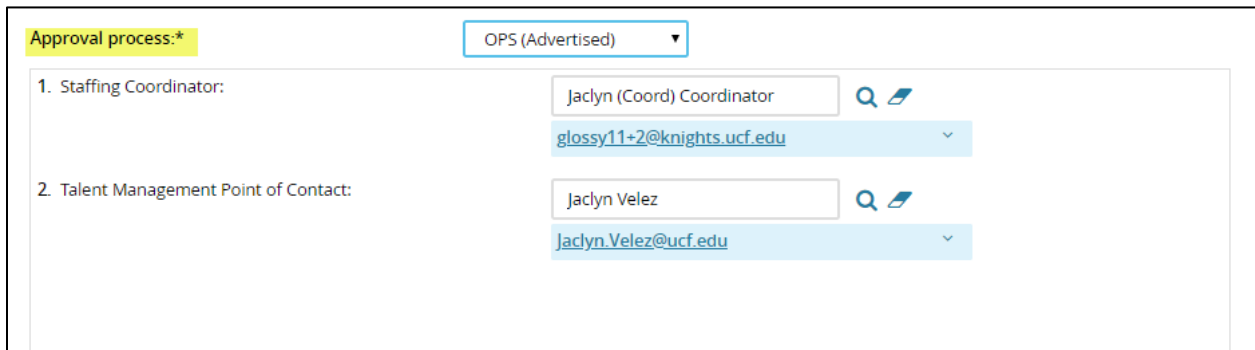
View Only Department Delegate: [Search] [No user selected.]

Funding Department Code for Background Screen: [Search] [No Funding Department Code for Background Screen selected]

Hiring Manager:* [Search]

Hiring Manager field will default to job card originator, if needed please make appropriate change to actual hiring manager.

5. **Approval process:** *Select* from drop down menu – for example, *OPS (Advertised)*.



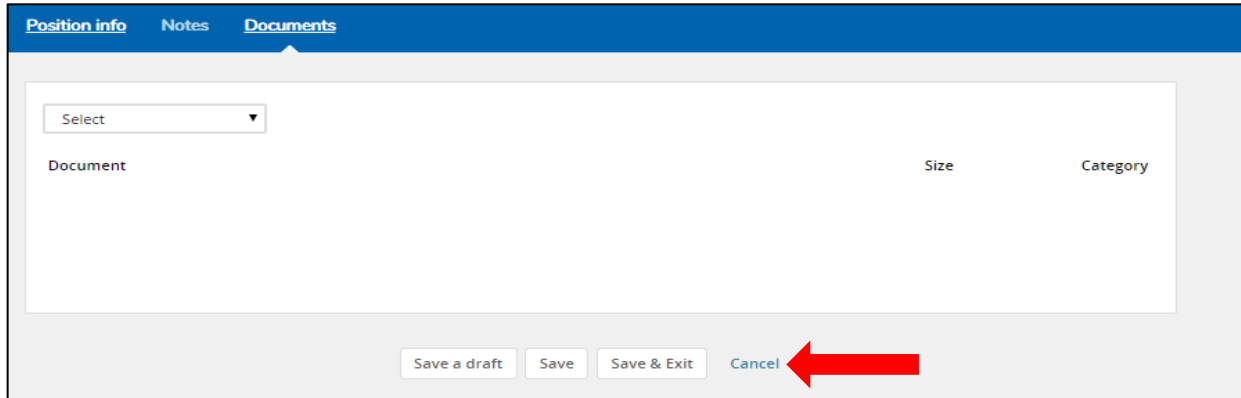
Approval process:* OPS (Advertised) ▾

1. Staffing Coordinator: Jaclyn (Coord) Coordinator [glossy11+2@knights.ucf.edu]

2. Talent Management Point of Contact: Jaclyn Velez [Jaclyn.Velez@ucf.edu]

6. Select appropriate Point of Contact for each approver role.
 - a. Staffing Coordinator – Actions allowed:
 - Update job details on job card
 - Approve or decline a job card
 - Update applicant status
 - b. Talent Management Point of Contact

Next page: You can **add notes** and/or **upload documents**.



Save a draft: Allow you to save but not submit the job card for approval.

Save: Saves and submits job card for approval workflow.

Save & Exit: Saves and submits job card for approval workflow. Page closes and brings you back to PageUp My Dashboard home page.

Cancel: Cancels and deletes information entered.

Managing Jobs

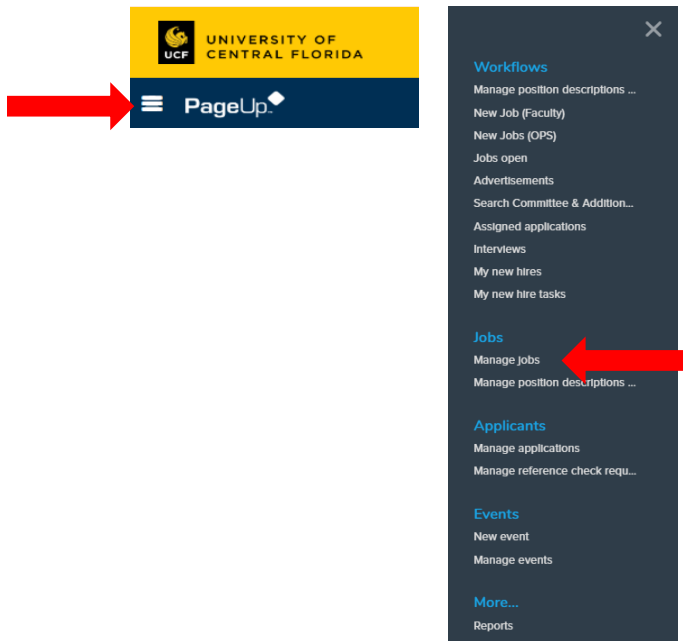
Managing Jobs

You can manage and track job postings in the following ways:


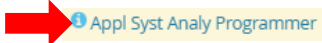
1. The jobs open link on the dashboard

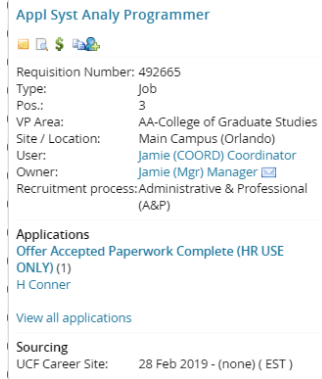


2. The Manage jobs link from the Main Menu.









- The Manage jobs screen displays assigned job postings and the following information:
 - a. Job number
 - b. Date created: Date job card was created
 - c. Job Title: Click the Job Title link to go directly to the Job Card.
 - d. Area
 - e. Department
 - f. Status: This is for internal purposes, allows you to see where you are in the hiring process.
 - g. Applications: Click the number to displays all applicants for this posting. See Manage Applications in this document for additional information.
 - h. Site: Posting location for position.
 - i. Opening Date
 - j. Closing Date
 - k. Hiring Manager

- I. Sourced: The green check mark indicates when a job is currently advertised and accepting applicants
- o Click the  information button next to the Job Title to see a quick view of the job posting information. 



Appl Syst Analy Programmer

Requisition Number: 492665
 Type: Job
 Pos.: 3
 VP Area: AA-College of Graduate Studies
 Site / Location: Main Campus (Orlando)
 User: Jamie (COORD) Coordinator
 Owner: Jamie (Mgr) Manager 
 Recruitment process: Administrative & Professional (A&P)

Applications

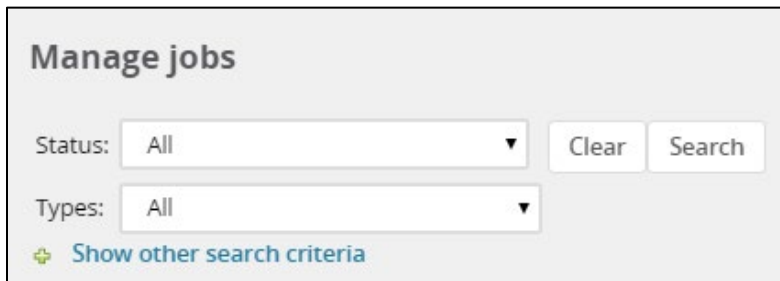
Offer Accepted Paperwork Complete (HR USE ONLY) (1)
 H Conner
[View all applications](#)

Sourcing


UCF Career Site: 28 Feb 2019 - (none) (EST)





- o To the far right of the screen, each job has the following options:
 - a. View/Edit the Job Card – Click the Edit button to open the Job Card.
 - b. View/Add Notes - Click the Notes button to open the Notes screen.
 - c. Preview the Job – Click the Preview button to open the advertised posting text.
 - d. Job costs can be recorded against a job by selecting the dollar sign on the Manage jobs screen.
 - e. View Applications – Click the Applications button to open the Manage Applications screen. See Manage Applications in this document for additional information.
- o Results can be filtered by selecting criteria. If you do not clear your search criteria, it will default the next time you visit the page.



Manage jobs

Status: 

Types: 

 [Show other search criteria](#)

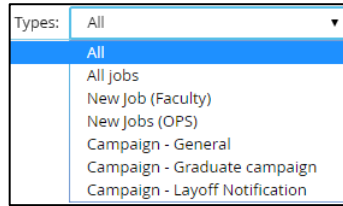
- a. Status: Select from the drop-down menu.



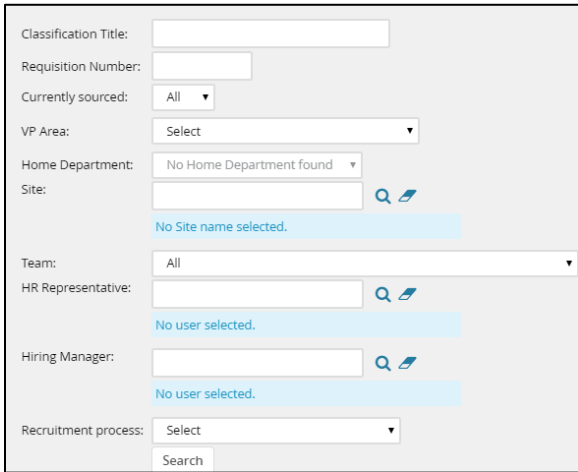
Status: 

- All
- Current recruitment
- Non current recruitment
-
- Draft
- Pending approval
- Approved
- Declined
- Under Review by Manager
- Final Talent Acquisition Review
- Final Compensation Review
- Interviewing
- Compliance Review
- Selected Candidate Approved
- Background Check
- Testing
- Cancelled
- Offer
- On hold
- Filled

b. Types: Select from the drop-down menu.

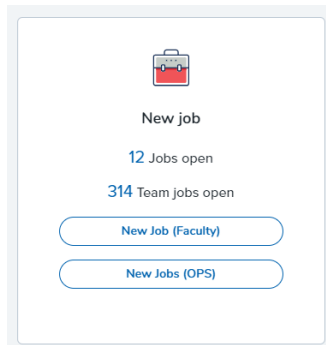


c. Click the plus sign for Show other search criteria: to find additional filtering options.



Click Search for results to update.

3. Manage jobs from the New Job task tile



- On the screen you can sort by:

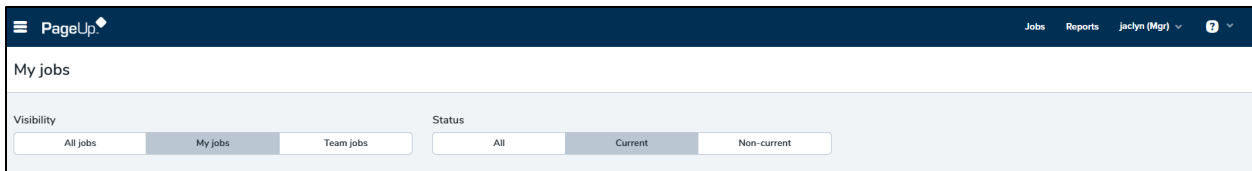
Visibility

- All jobs
- My jobs
- Team Jobs

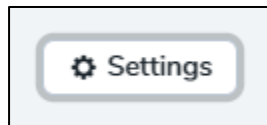
As well as by:

Status

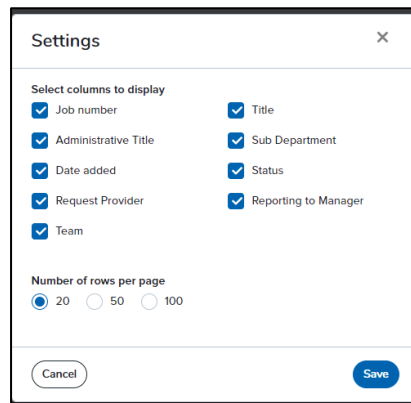
- All status jobs
- Current jobs
- Non-current jobs



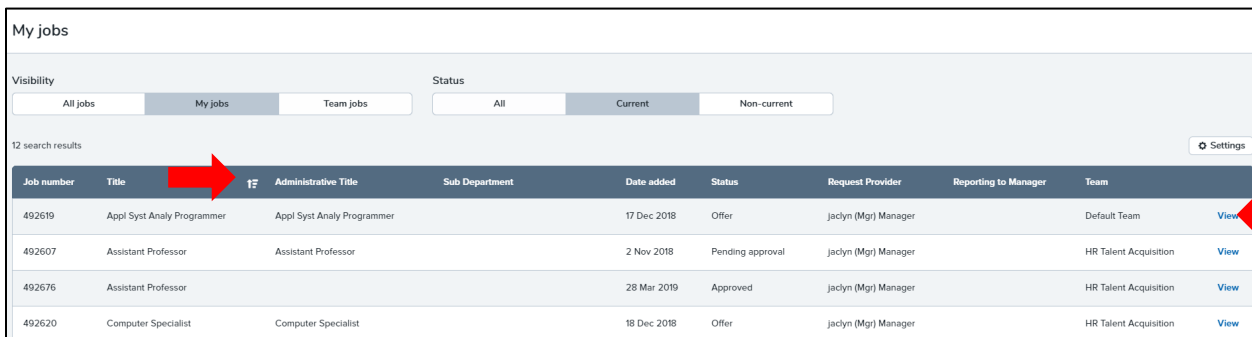
- If you click on, rows



you can remove displayed columns and view more



- You can also sort the columns



- Once you find the position you want to work on, click view.

MANAGE APPLICATONS

Manage Applications

There are several ways to view and manage applicants for any job posting:

1. On the *My Dashboard*, click on **Jobs** located on the blue toolbar, this will take you to the *Manage Jobs* Screen.



- a. From the *Manage Jobs* screen, **click on the job title**, this will take you to the *job card*, click **View Applications** on the top of the screen.

Manage jobs

Status:

Types:

[Show other search criteria](#)

Job No.	Date created	User	Title	Area	Department	Status	Applications
492620	18 Dec 2018	JM	Computer Specialist	ADMIN & FINANCE-BUSINESS SVCS	BS SV-AUX OPERATIONS	Offer	6
492619	17 Dec 2018	JC	Appl Syst Analy Programmer	AA-College of Graduate Studies	GR STDY-PAYROLL	Approve	7
492616	7 Dec 2018	JM	HRIS Analyst Senior	ADMIN & FINANCE-HUMAN RESOURCE	HM RES-PAYROLL	Approve	1

(492620) Computer Specialist

[View applications](#)

- b. From the *Manage Jobs* screen, **click the number** listed in the *Applications* column.

Manage jobs

Status:

Types:

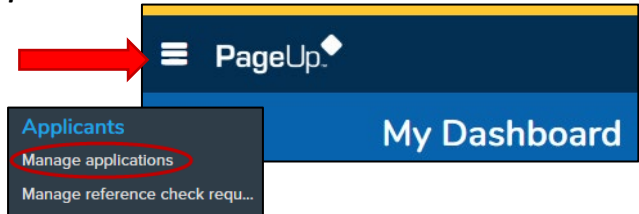
[Show other search criteria](#)

Job No.	Date created	User	Title	Area	Department	Status	Applications
492620	18 Dec 2018	JM	Computer Specialist	ADMIN & FINANCE-BUSINESS SVCS	BS SV-AUX OPERATIONS	Offer	6
492619	17 Dec 2018	JC	Appl Syst Analy Programmer	AA-College of Graduate Studies	GR STDY-PAYROLL	Approve	7
492616	7 Dec 2018	JM	HRIS Analyst Senior	ADMIN & FINANCE-HUMAN RESOURCE	HM RES-PAYROLL	Approve	1

c. From the *Manage Jobs* screen, click the **Applications icon (blue person)** located on the far right.

Job No.	Date created	User	Title	Area	Department	Status	Applications					
492620	18 Dec 2018	JM	Computer Specialist	ADMIN & FINANCE-BUSINESS SVCS	BS SV-AUX OPERATIONS	Offer	6					
492619	17 Dec 2018	JC	Appl Syst Analy Programmer	AA-College of Graduate Studies	GR STUDY-PAYROLL	Approve	7					

1. From the *Main Menu*, click the **Manage Applications** link








2. Once on the *Manage Applications* screen, use the **Search** tab to identify the posting.
3. You can search for the position via the **lookup Q icon**, then search using the **job posting number** or **job title**.
4. To view the list of **active** applicants only for the identified posting, **check the box** next to *Current application statuses only*.

5. You can also **select the desired Application status**, or search by applicant email, applicant name or applicant number.

6. Click **Search**.

The *Results* tab displays the selected criteria along with other criteria such as:

1. Job Title and Job Number
2. Submitted Date
3. Status of each applicant (click to change the application status)
4. Candidate Name (Click to open Applicant Card)
5. Candidate Email
6. Sub source – If applicant found position via secondary job source
7. Applicant Flag – for USPS preference such as Veteran, USPS employee, etc.

Flag no.	Name	Flag	Flag no.	Name	Flag
1:	Veteran's Preference		1:	Recall preference	
2:	Ineligible for Rehire		2:	USPS preference	
			3:	Written notice preference	






























8. Additionally, there are four buttons displayed on the far right of the screen. These four buttons allow you to do the following:

- a. Click the **View Resume** button to view the resume/CV in a new window.
- b. Click the **Download Resume** button to download and save to the computer.
- c. Click the **View Applications and Forms** button to view application and other documents in a new window.
- d. Click the **Applicant Card** link to open the *Applicant Card*.



1 Senior Secretary (492664)

Search **2** Results **3**

4	5	6	7	8			
Submitted	Status	First name	Last name	Email	Sub-source	Flags	Buttons
27 Feb 2019	Interview 1	Captain	Crunch	glossy11+1@knights.ucf.edu	WOM	<ul style="list-style-type: none">  Veteran's Preference  Ineligible for Rehire 	<ul style="list-style-type: none">  Applicant Card  Applicant Card  Applicant Card
27 Feb 2019	Create Hire Documents	Noah	Velez	glossy11_2@knights.ucf.edu	CareerB	<ul style="list-style-type: none">  Recall preference  USPS preference  Written notice preference 	<ul style="list-style-type: none">  Applicant Card  Applicant Card  Applicant Card
27 Feb 2019	Interview 1	Jon	Snow	glossy11_3@knights.ucf.edu	HEJ		<ul style="list-style-type: none">  Applicant Card  Applicant Card  Applicant Card
28 Feb 2019	Interview 1	Sandra	Rodriguez	sandra.rodriquez@ucf.edu	Website		<ul style="list-style-type: none">  Applicant Card  Applicant Card  Applicant Card
1 Mar 2019	Interview 1	George	Peterman	pupdown3+103@gmail.com	Empl FLA		<ul style="list-style-type: none">  Applicant Card  Applicant Card  Applicant Card
1 Mar 2019	Hiring Manager Under Review	Nika	Gooding	nikag749@aol.com	WOM		<ul style="list-style-type: none">  Applicant Card  Applicant Card  Applicant Card
1 Mar 2019	Hiring Manager Under Review	Shanna	Millien	atsucfpu@gmail.com	WOM		<ul style="list-style-type: none">  Applicant Card  Applicant Card  Applicant Card
5 Mar 2019	Hiring Manager Under Review	Carol	Arce	Carol.Arce@ucf.edu	Website		<ul style="list-style-type: none">  Applicant Card  Applicant Card  Applicant Card

Applicant Card

The *Applicant Card* displays a full history of the applicant, including the following information (see full screenshot below).

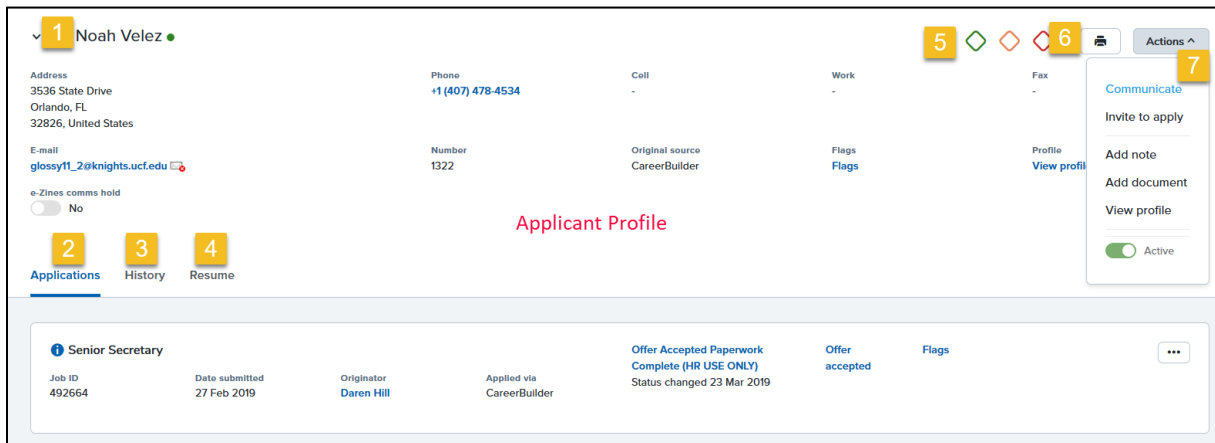
1. Applicant Profile
2. Applications completed
3. History

Note: Filter History by selecting criteria from the *Item* and *Job* drop-down menus. The filter is automatically applied when selected and the information below is updated. The *History* section can show users important information about the applicant and actions taken during the process.

Examples of Items:

- **Notes:**
 - Status changes and who changed the status.
 - The reason the applicant provided when declining an event booking or offer.
- **Bookings:** Details of event bookings
- **Communications:** Emails that have been sent to the applicant
- **Documents:** Documents associated with the application (i.e., Resume/CV, reference letters, etc.)

4. Resume
5. Grouping icon, you can assign candidate into one of three different groups to take action on.
6. Click the **Print** button in the top right hand corner to print the application.
7. Option to communicate to candidate, add note, document or view profile.



Applicant Profile

1 Noah Velez

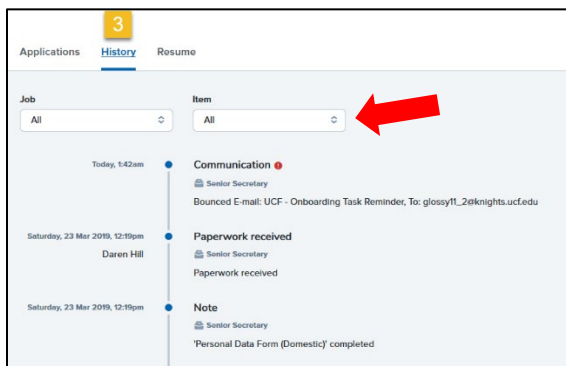
Address: 3536 State Drive, Orlando, FL 32826, United States
 Phone: +1 (407) 478-4534
 E-mail: glossytl_2@knights.ucf.edu
 Number: 1322
 Original source: CareerBuilder
 Flags: Flags
 Profile: View profile

Applications | **History** | Resume

2 Applications | **3** History | **4** Resume

5 [Grouping icons] **6** [Print icon] **7** [Actions menu]

Senior Secretary
 Job ID: 492664 | Date submitted: 27 Feb 2019 | Originator: Daren Hill | Applied via: CareerBuilder
 Offer Accepted Paperwork Complete (HR USE ONLY) | Offer accepted | Status changed 23 Mar 2019



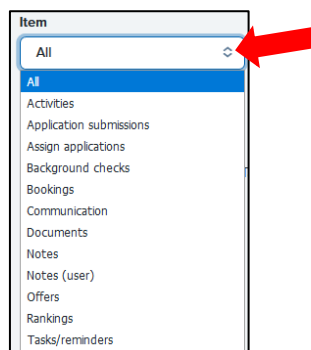
3 History

Job: All | Item: All

Today, 1:42am: Communication - Bounced E-mail: UCF - Onboarding Task Reminder, To: glossytl_2@knights.ucf.edu

Saturday, 23 Mar 2019, 12:19pm: Paperwork received - Daren Hill

Saturday, 23 Mar 2019, 12:19pm: Note - Personal Data Form (Domestic) completed



Item

- All
- All
- Activities
- Application submissions
- Assign applications
- Background checks
- Bookings
- Communication
- Documents
- Notes
- Notes (user)
- Offers
- Rankings
- Tasks/reminders

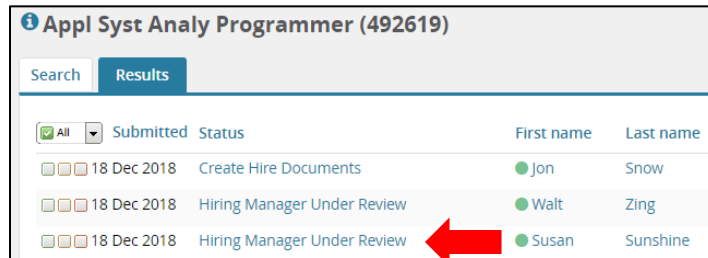
Change Applicant Statuses

Application statuses can be changed individually or using bulk actions. Do not use bulk actions for creating documents.

Certain applicant statuses will send an email notification to the applicant through the Talent Management system. Most emails can be edited before sending.

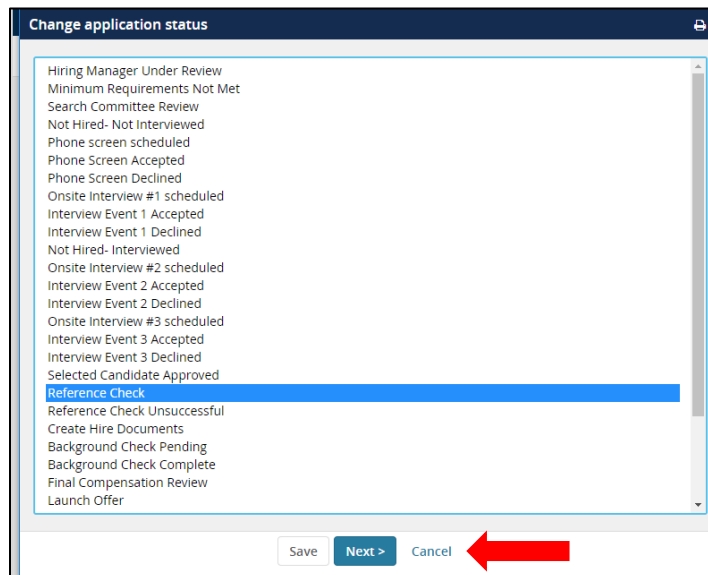
Changing an applicant status individually

1. Click the link of the current applicant status.



Submitted	Status	First name	Last name
18 Dec 2018	Create Hire Documents	Jon	Snow
18 Dec 2018	Hiring Manager Under Review	Walt	Zing
18 Dec 2018	Hiring Manager Under Review	Susan	Sunshine

2. Select the appropriate applicant status from the *Change application status* pop up window and select **Next**.



Change application status

- Hiring Manager Under Review
- Minimum Requirements Not Met
- Search Committee Review
- Not Hired- Not Interviewed
- Phone screen scheduled
- Phone Screen Accepted
- Phone Screen Declined
- Onsite Interview #1 scheduled
- Interview Event 1 Accepted
- Interview Event 1 Declined
- Not Hired- Interviewed
- Onsite Interview #2 scheduled
- Interview Event 2 Accepted
- Interview Event 2 Declined
- Onsite Interview #3 scheduled
- Interview Event 3 Accepted
- Interview Event 3 Declined
- Selected Candidate Approved
- Reference Check**
- Reference Check Unsuccessful
- Create Hire Documents
- Background Check Pending
- Background Check Complete
- Final Compensation Review
- Launch Offer

Save Next > Cancel

3. Select **Move now**.

NOTE: Maintain radio button responses (circled in RED) as defaulted.

Confirm status change

You are about to move Walt Zing to a different status:

From status: Hiring Manager Under Review
To status: Reference Check

Communication template: -- No template --

E-mail: Applicant: Yes No

ⓘ No SMS will be sent to the applicant as they do not wish to receive them.

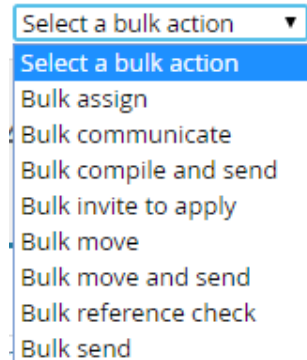
Additional users from job: Yes No

Note

The following will be added to the applicant notes for administrators to view:

Update job status from Approved to Reference checking: Yes No

Defintions: Available Bulk Action Options



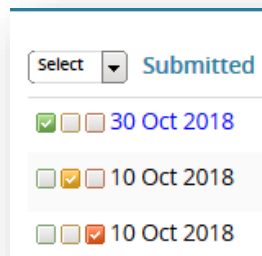
- Bulk Assign:** Used to assign application to any other user in the system for review. Assigned users will be sent an email notification and receive a notification on the *Assigned Applications* task on their dashboard. The assigned user can review the application with the option to approve or decline the applicant. Approving or declining the applicant has no effect on the applicant status or progress, but is for informational purposes only. The assignee can view the feedback under history on the Applicant Card. Only one user can be assigned to the application at a time. Assigning an application to another user will cancel the previous assignment.
- Bulk Communicate:** Used for communication with the applicants. Choose from the available templates and edit as necessary, or start from scratch. This function provides the option to set up delayed emails, but be careful as these cannot be canceled once scheduled.
- Bulk Compile and Send:** Used to compile documents of selected applicants into a single PDF. Choose what to pull into the PDF by selecting checkboxes next to relevant information. Once the PDF is generated, download it or email the complied documents to another user in the system.
- Bulk Invite to Apply:** This function allows users to invite existing applicants to apply for a different job. This is available via the *Manage Applications* page.
- Bulk Move:** Used to change the application status of multiple applicants at once. Note: Do not use this action to send emails to internal users as part of the bulk move action. Otherwise, internal users will receive an email for every applicant moved into this status. To send an email to internal users, use *Bulk Move and Send*, as it will eliminate the duplicate emails.
- Bulk Move and Send:** Used to change the application status of multiple applicants at once and send application materials to another user in a single email. This bulk action may be beneficial if other users need to be notified of the status change, but should not receive an email for each applicant.
- Bulk Reference Check:** Rather than using the application status to trigger reference letter checks, use this option to *Bulk Refence Check*. Select the appropriate reference check form and modify the email that will be sent to the referee accordingly. The ability to modify the email is one benefit of using bulk reference check over using application status.
- Bulk Send:** Used to send application materials to another user as a separate attachment. Each application and document for each applicant will be sent as a separate attachment. For most purposes, *Bulk Compile and Send* will be a much better option as it compiles all of the documents into one sorted attachment.

Bulk Actions

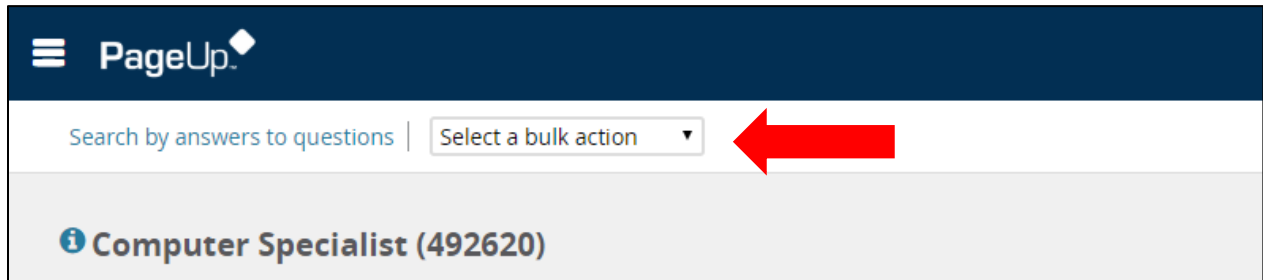
The *Bulk Action* function makes it easy to perform an action on one or more applicants at once, such as *status update*, *compile documents* or *send communication*. To perform bulk actions:

1. Group applicants- you may use the colored checkboxes to the left of the applicant names to help select and categorize applicants all at once. The boxes have no default meanings and may be used for the reviewer’s preferences. For instance, the green box may be used to identify applicants for phone interview, the yellow box may be used to identify applicants who should have further review, and the red box may be used to identify applicants to be disqualified for not meeting the minimum qualifications.

Note: the color categories are temporary and will clear if the screen is navigated away from or refreshed. Remember, the colors have no inherent meaning of their own. They can be used to classify applicants into whatever groups are needed.

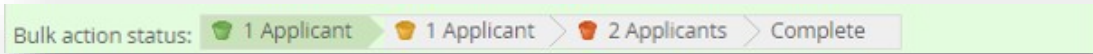


2. Once the appropriate box has been checked for the applicants, use the *Select a bulk action* drop-down menu to select an action.



NOTE: The PageUp bulk actions functions are extremely powerful and need to be used responsibly. Incorrect use of bulk actions can lead to large numbers of applicants being sent incorrect information.

3. Once the bulk action is selected, a new window will open with instructions for that specific task. The system allows action to be taken on applicants from each color category. The bar at the top shows the color group being worked with.
 - a) Enter the information or choose criteria for the green applicants.
 - b) Enter the information or choose criteria for the yellow applicants.
 - c) Enter the information or choose criteria for the red applicants.



4. Regroup the applicants as necessary and repeat additional *Bulk Actions* as needed.

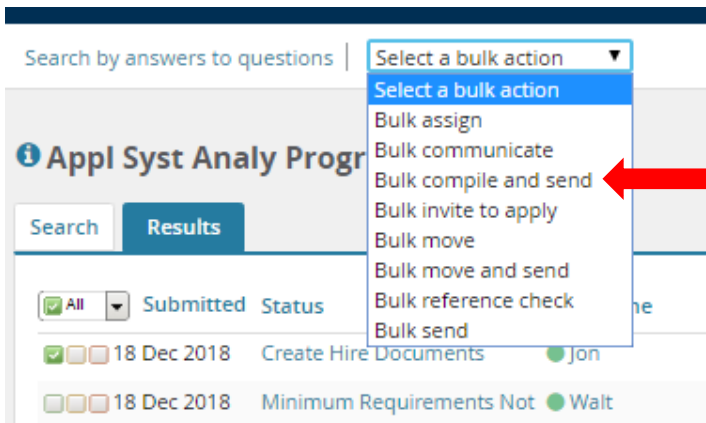
Bulk Compile and Send

From the *Manage Applications* screen, view and download all applicants documents into one PDF using the *Bulk Compile and Send* function.

1. **Check the box** next to the name of all applicants to include in the PDF.

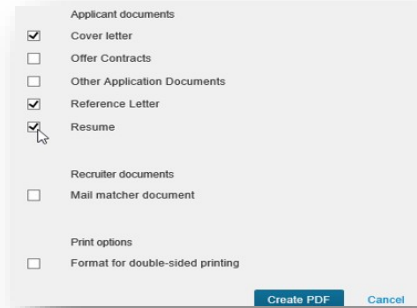


2. Select ***Bulk Compile and Send*** from the drop-down menu.



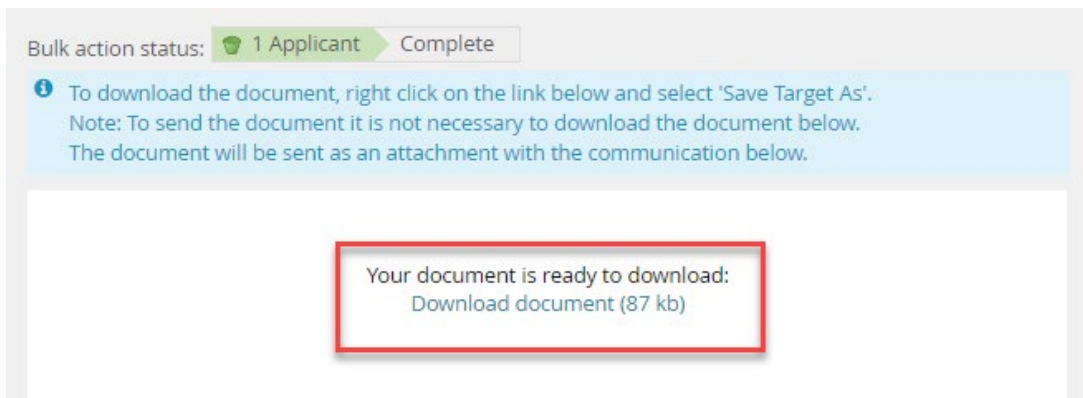
NOTE: *Bulk Compile and Send* does not send the document automatically, but does provide the option to send via email once generated.

3. Select all documents to include and click **Create PDF**.

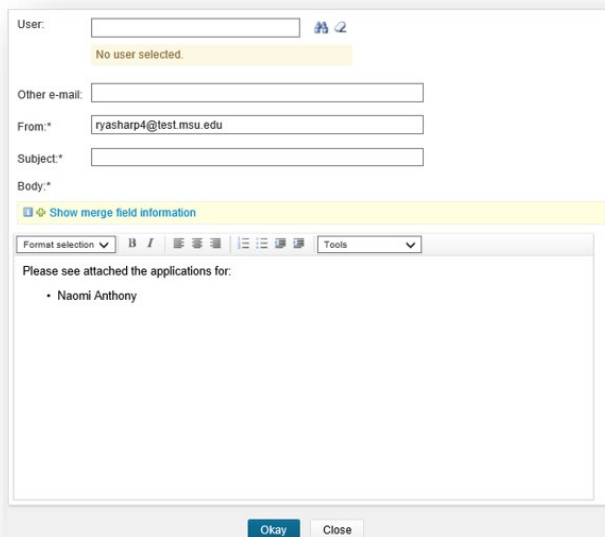


4. Choose to download the PDF or send to others for review.

a. To download the PDF: click the **Download Document** link to open the PDF.



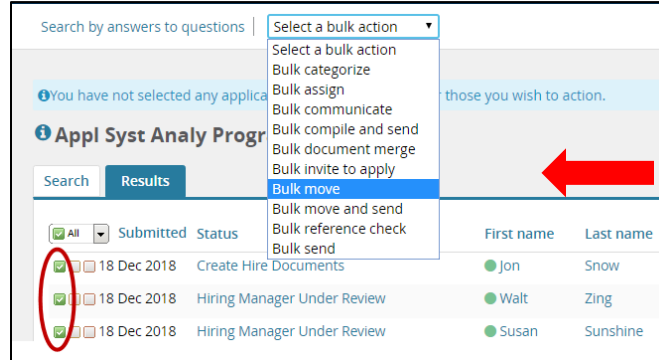
b. To send the PDF to others for review, enter information in the email form and edit as needed.



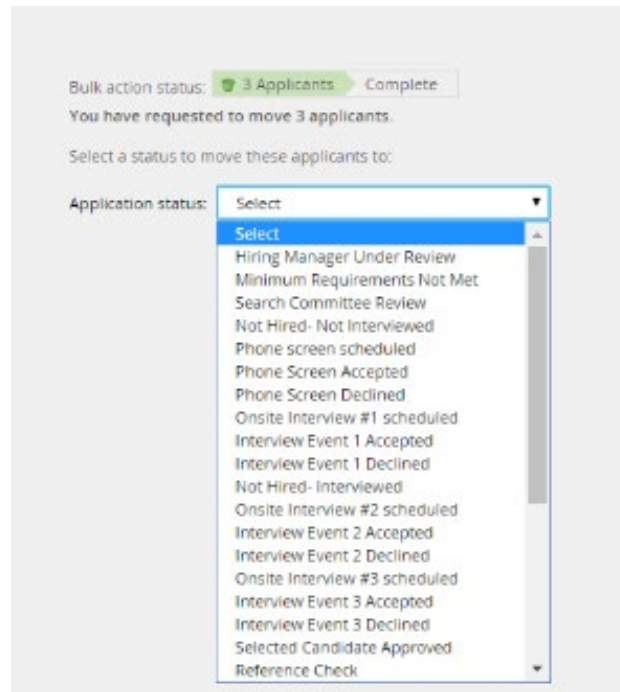
5. Click **Okay** to send the email and return to the *View Applicant* screen.

Bulk Move

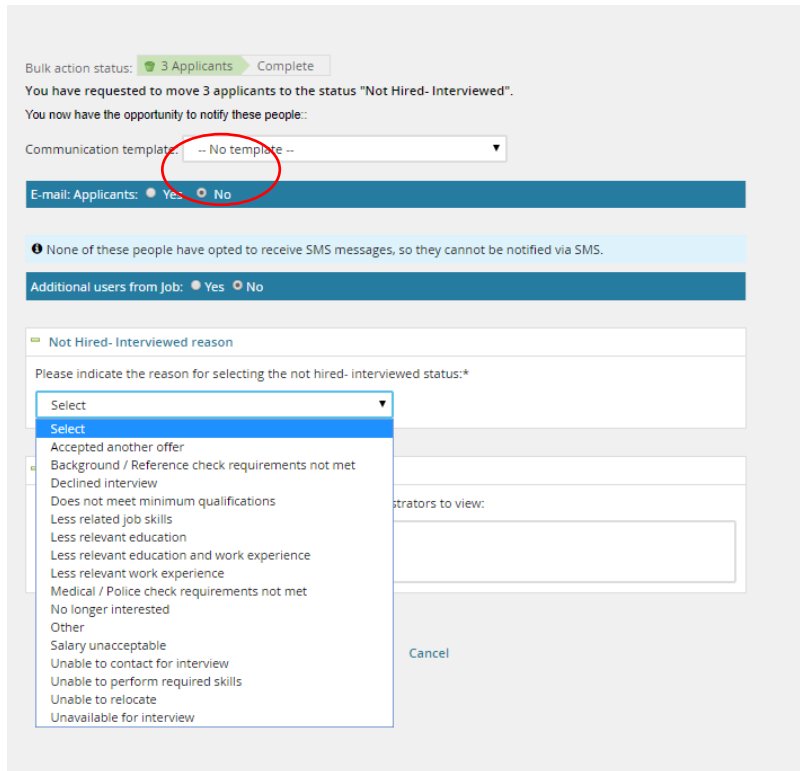
1. **Group applicants using the colored checkboxes** to the left of their names to select and categorize applicants all at once.



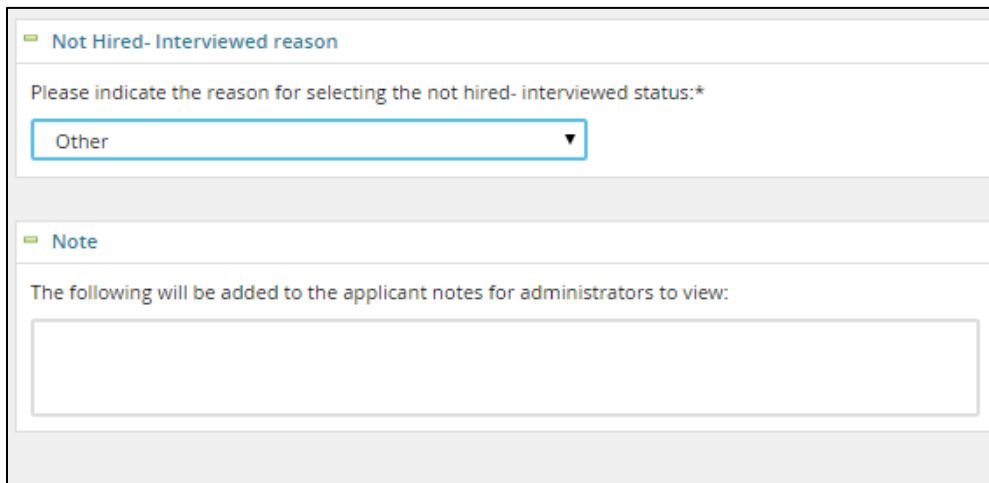
2. Once the appropriate box has been checked for each applicant, select **Bulk Move** from the drop-down menu.
3. Select the appropriate *Application status* from the drop-down menu and click **Next**.



- When selecting **Not Hired – Not Interviewed** or **Not Hired – Interviewed**, you will need to select the rationale.



- Leave default settings for *Communication template*
- You may add **Additional users from Job** to communicate status change.
- Indicate the reason for selecting the **Not Hired – Not Interviewed** or **Not Hired – Interviewed** status from drop-down menu.
- If you select **Other**, please enter reason in the open **Note** section.



- Click **Move now**.

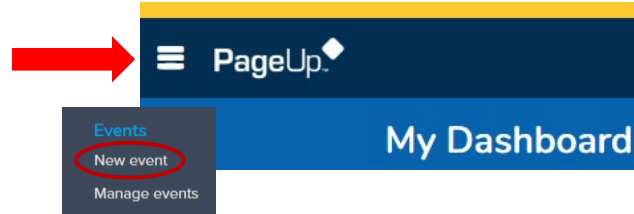
How to Create & Book an Event

Create & Book an Event

Booking an event allows users to manage and invite applicants to interview. The user sets up time slots and invites applicants to book a preferred time. These events can be entered into user's Outlook calendar.

PAGEUP MY DASHBOARD

Navigation: Main Menu | New event



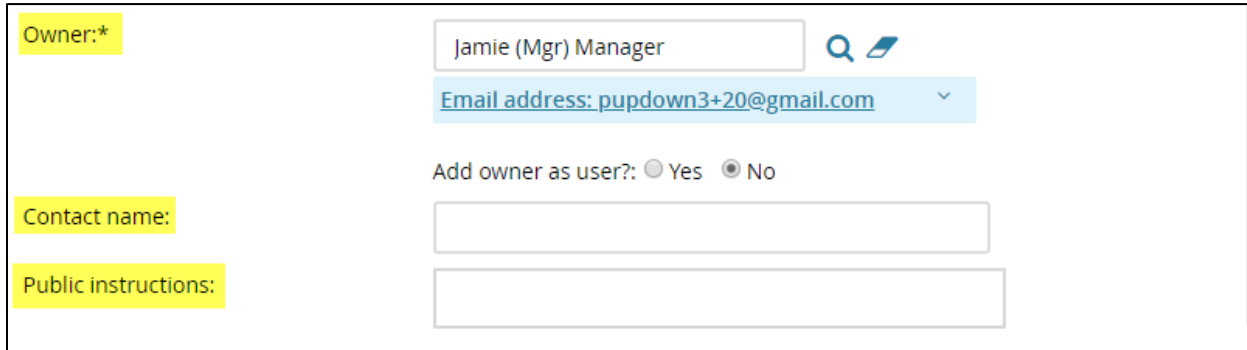
Create New Event

1. **Title:** Type in a title for your event, for example: *Phone screen for Job No#* or *Interview for Job No#*.
2. **Event type:** Select from drop down menu.

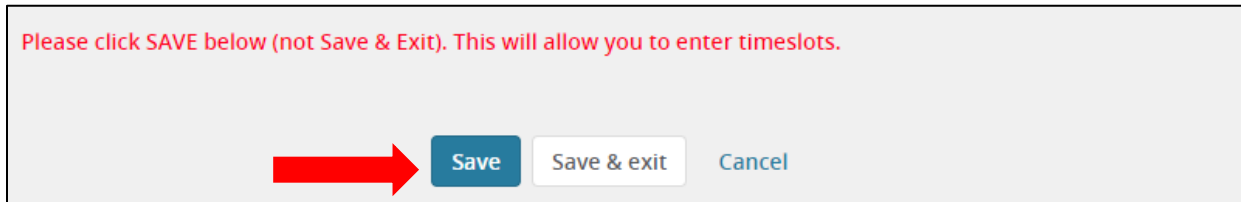
3. **Venue:** Click icon to select venue.
 - **IMPORTANT:** PageUp does not reserve the *Venue* location. **Venue must be reserved through department calendar.**
 - **NOTE:** Allow pop-ups in your browser to open in settings to search for venue
 - If you do not see the venue, **you may add a venue** by performing the following actions:
 - **Scroll down** and select **Add new venue**
 - **Type in** venue name and mandatory information in fields
 - **Save**

NOTE: Phone and Skype are listed as venues for you already
4. **Job:** Select the **job** that the event is being scheduled for, if required.


5. **Owner:** Identify the *Owner* (the person who will be conducting the interview) of the event. **NOTE:** This will default to the initiator who creates the event.
6. **Add owner as user?:** If set to *Yes*, this will set the owner of the event as a user against the time slot when an applicant selects and confirms a time slot. Assigned users may be facilitators of the event.
7. **Contact name:** This is helpful to applicants when asking for someone when arriving at an event.
8. **Public instructions:** For example, directions to the venue or information about what to bring.



9. Click **Save** to create the event and progress to set up the *time slots* available for event.

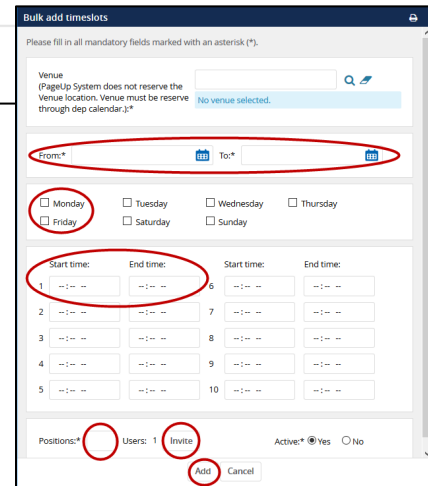


Creating bulk time slots




Creating Bulk time slots enables you to set up several time slots at once. *For example*, if interviews are being held every Tuesday, Wednesday, and Friday for the next four weeks, this function allows you to create all the time slots in one operation.

1. Next to *Add bulk time slots*, click **Add**.
2. In the *Bulk add timeslots* pop up window, complete the following:
 - **Venue** – Carries over from prior screen
 - **From** – Beginning date of the event
 - **To** – End date of the event
 - Select the day(s)
 - Complete the **Start time** and **End time** for up to 10 time slots
 - **Positions** – Enter the number of applicant(s) the timeslot is available to hold.
 - For example, for an Assessment, you might allow a maximum of 12 people to attend one time slot, so you will indicate 12 positions; for a face-to-face interview, you may only want 1 person to attend each timeslot, so you will indicate 1 position.



- **Users** – If required, click **Invite** to select users in the *Add Attendees* pop up-window, then click **OK**. You will have the option to email them regarding the upcoming event below. For example: Hiring managers, Staffing Coordinators, etc. At bottom of screen click **Okay** to email the invited users, notifying them of the event.
- **Active** – If Yes, the timeslots will be as available for applicants.

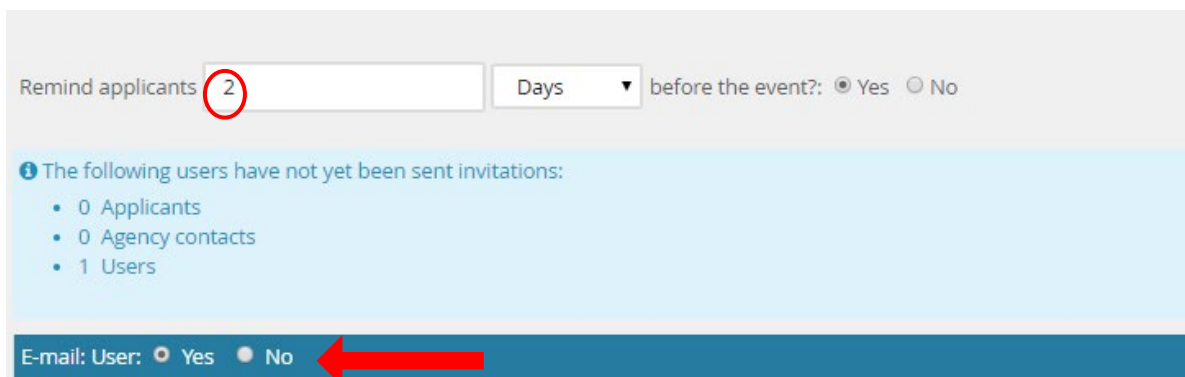
3. Confirm all details are completed and then click **Add**. The time slot will then be displayed in the time slot panel below.



The screenshot shows an 'Add attendees' pop-up window with a search bar and a list of users, each with a 'No user selected.' message. Below the pop-up is a table of event time slots:

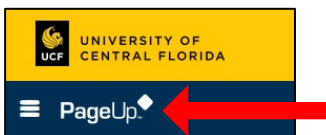
✓	Date	Start Time	End Time	Users	Applicants	Event Name
✓	5 Feb 2019	8:00am	9:00am	0 Users	0 Ap	ARTS & HUMANITIES A
✓	5 Feb 2019	9:00am	10:00am	0 Users	0 Ap	ARTS & HUMANITIES A
✓	5 Feb 2019	11:00am	12:00pm	0 Users	0 Ap	ARTS & HUMANITIES A
✓	5 Feb 2019	1:00pm	2:00pm	0 Users	0 Ap	ARTS & HUMANITIES A
✓	6 Feb 2019	9:00am	10:00am	0 Users	0 Ap	ARTS & HUMANITIES ANNEX
✓	6 Feb 2019	11:00am	12:00pm	0 Users	0 Ap	ARTS & HUMANITIES ANNEX
✓	8 Feb 2019	8:00am	9:00am	0 Users	0 Ap	ARTS & HUMANITIES ANNEX

4. If you desire to send out a reminder email out to applicants prior to the event, select **Yes** against the *Remind applicants* field and set the desired reminder time using the drop-down box (for example, two hours or two days).
5. Email User: YES



The screenshot shows the event configuration form. The 'Remind applicants' field is set to '2' days, and the 'before the event?' radio buttons are set to 'Yes'. Below this, a blue box indicates that 1 user has not yet been sent invitations. At the bottom, the 'E-mail: User:' radio buttons are set to 'Yes', with a red arrow pointing to the 'Yes' option.

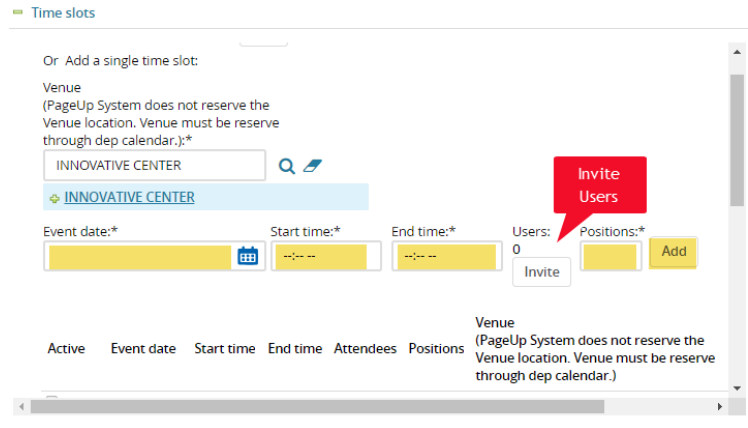
6. Click **Save & Exit** to confirm the time slot details for the new event and be redirected to the *Manage events* page.
7. Click **PageUp** to return to *Hiring Manager Dashboard*



The screenshot shows the PageUp logo and navigation bar. A red arrow points to the 'PageUp' text in the navigation bar.

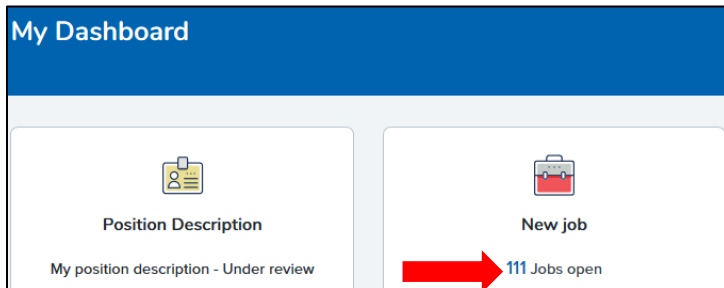
Creating a single time slot

1. **Venue:** This will pre-populate with the event's *Venue*.
2. **Event date:** Use the date picker
3. **Start time:** Use the number selector to set a 12 hour format
4. **End time:** Use the number selector to set a 12 hour format
5. **Users:** If required, click **Invite** to select users in the *Add attendees pop up window*, then click **Ok**. You will have the option to email them of this upcoming event below.
6. **Positions:** Enter the number of applicant(s) positions available.
7. Click **Add**.

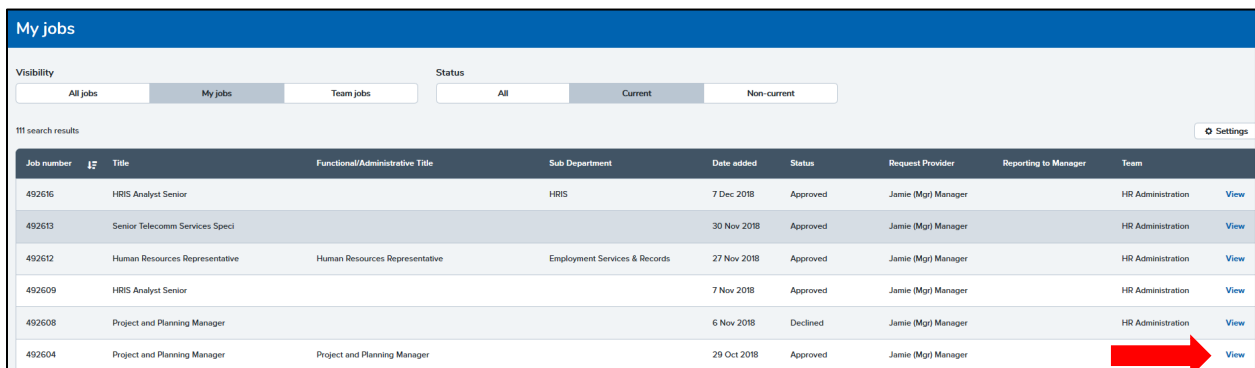


Inviting applicants to an event

1. Click on **Jobs open**.



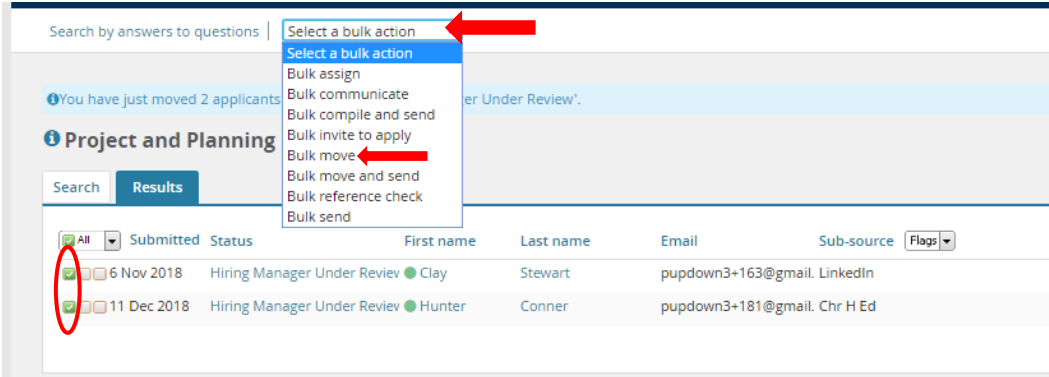
2. Click on **View** for the position for which you created the event.



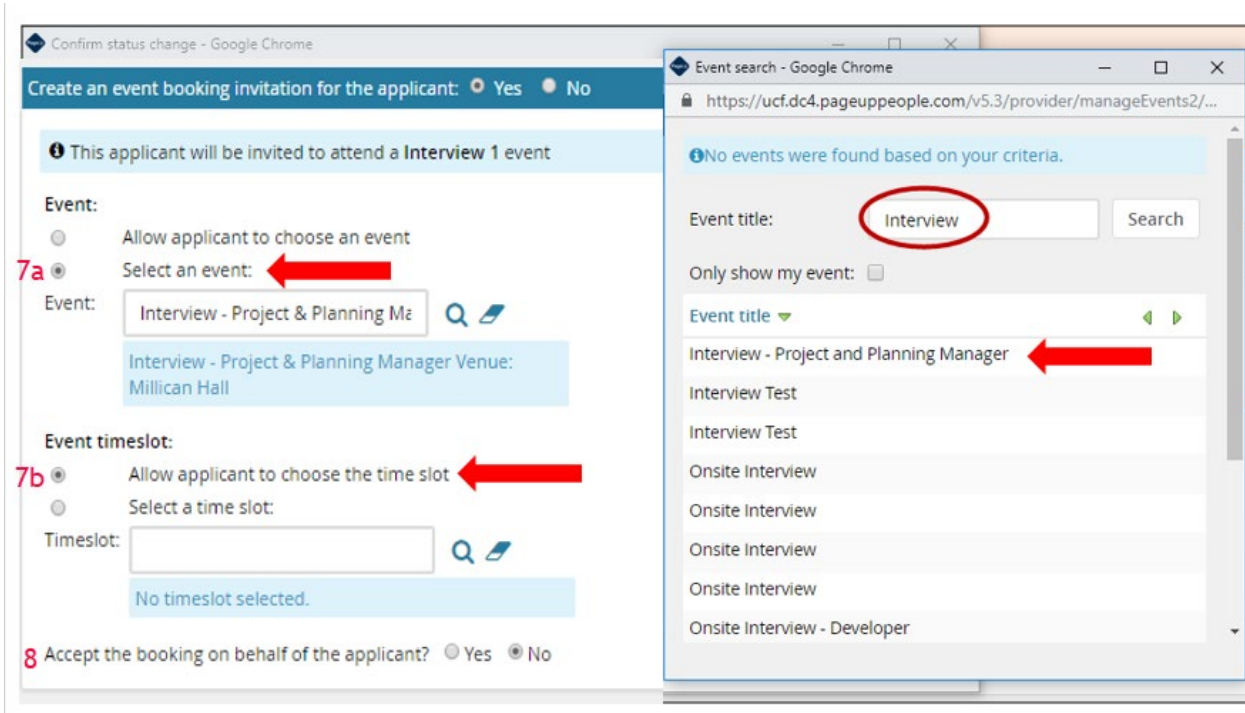
3. Click on **View applications**.



- To send event invitation to more than one applicant, select the applicants you want to invite by **clicking on the selection box**.
- Click on **Select a bulk action** to choose **Bulk move**.



- Select the status the event is for:
For example: **Interview 1**, then click **Next**
- Recommendation:**
 - For **Event**, click the radio button: **Select an event** and for
 - Event timeslot** click the radio button: **Allow the applicant to choose an event** to allow applicants to select the time slot on their own.
- Leave **Accept the booking on behalf of the applicant?** As **NO**.
- Click **Move now**. There is a template email attached to the status which explains the steps the applicant will need to follow to book a time slot.



- The applicant status will change.

Submitted	Status	First name	Last name
26 Jul 2018	Hiring Manager Under Review	Greg	Morton
26 Jul 2018	Hiring Manager Under Review	John	Miller
14 Aug 2018	Hiring Manager Under Review	Samantha	Jones
14 Aug 2018	Onsite Interview #1 scheduled		

Managing your event(s) by navigating to *Main Menu* / *Manage Events*

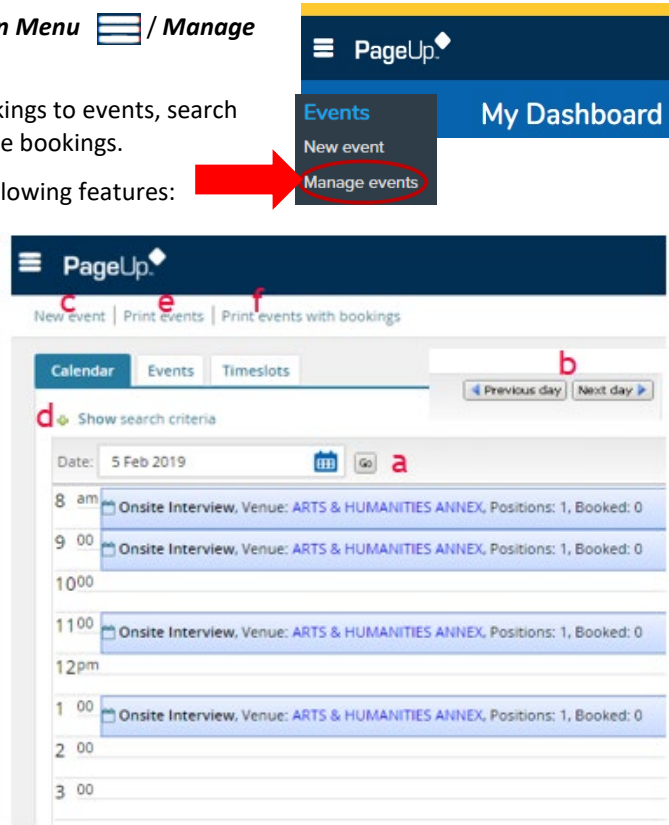
Here you will be able to view events, view bookings to events, search for events, edit events, delete events and delete bookings.

To navigate through different days, use the following features:

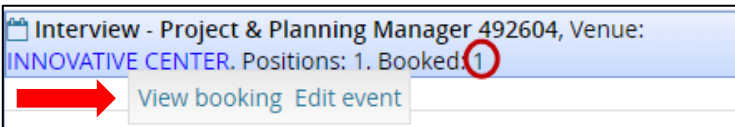
- Select a specific date and click the **Go** button. That day's events will be listed.
- You can also **navigate to previous or following days** by selecting the **Previous day** or **Next day** buttons respectively.

Other options available on this page are:

- New event** - Provides the ability to add new events.
- Show search criteria** - Provides the ability to search for specific events (**click plus sign to open**).
- Print events** - Provides the ability for users to print the events displayed on the calendar.
- Print events with bookings** - Provides the ability for users to print the events displayed on the calendar, along with the names of the applicants who are booked into the time slots for that day.



Once applicants book their event, their booking will appear on the event calendar.



- Editing an event** - Specific details about an event may need to be edited from time to time. This can be done two ways:
 - When viewing events in the *Calendar* tab, **left-click in the event panel**, and click the **Edit event** link.
 - When viewing bookings within the **Events** tab, click the **Edit** link next to any event. In order to search for a particular event, click the **Show** other search criteria

You can modify the details as required and click **Save** to continue.
- Editing a timeslot (Rescheduling)**
 - From the *Main Menu*, click **Manage events**.
 - Click the **Timeslots** tab.


- c. Next to the relevant event, click **Edit timeslot**.
- d. Make the required changes.
- e. Click **Save**.

You will be asked if you wish to send an e-mail to existing users and/or attendees to notify them of any changes. If you choose *Yes*, an email template will populate. You may edit this template if desired.

3. **Deleting applicant bookings (Canceling)**

- a. From the *Main menu*, click **Manage events**.
- b. Click the **Timeslots** tab.
- c. Next to the relevant event, click **Edit timeslot**.
- d. Click **Delete** next to the applicant you wish to remove from the booking.

4. **Adding events to your calendar** - This currently only works for Microsoft Outlook.

- a. From the *side menu*, click on **Manage events**.
- b. On the *calendar page*, you will see any events you have scheduled for that day and the option to go to the next day or the previous one. **Find your desired event**.
- c. Click the **calendar icon**  to export the event and add it to your calendar.
- d. **Open the details of the calendar file** that you have just downloaded. Click **Save & Close** to save the file to your Outlook calendar.

REFERENCE CHECK

Reference Check

2 Reference Checks are required to process USPS and A&P hires.

3 Reference Checks are required to process Faculty hires.

There are four (4) types of reference check form options you may select to have the referee complete.

The types of reference check forms are:

- A&P Reference Questionnaire
- Faculty Reference Questionnaire – has option to upload letter of recommendation/reference in addition to answering questionnaire
- Letter of Recommendation/Reference – Referee to upload a letter of recommendation/reference instead of answering questionnaire
- USPS & OPS Reference Questionnaire

Invite Referees to Conduct Reference Check / Recommendation Letter

You can request reference letters and letters of recommendation at any point in the hiring process. Referee information is provided by the applicant when applying for the position. Reference letters and reference check forms that have been submitted through the system can be compiled with all other application documents using **Bulk Compile and Send** (*directions can be found in Managing Applicants reference guide*).

There are four ways that you can complete reference checks request:

Option 1: Bulk Reference Check

Use **Option 1** if you would like to:

- Send to one or more applicants.
- Select the type of reference check form to be sent to the referee.
- Set the **expiry date** or deadline by which the reference check must be completed.
- Customize the communication that is sent to the referee, such as department contact information or guidelines for writing the reference letter.
- Attach a custom department questionnaire to the email. The referee can then complete the custom questionnaire and upload against the reference check form.

Option 2: Send Reference Check form from Applicant Card

Use **Option 2** if you would like to:

- Send to one applicant
- Select the type of reference check form to be sent to the referee.
- Set the **expiry date** or deadline by which the reference check must be completed.
- Customize the communication that is sent to the referee, such as department contact information or guidelines for writing the reference letter.
- Attach a custom department questionnaire to the email. The referee can then complete the custom questionnaire and upload against the reference check form.

Option 3: Change application status to *Reference Check Requested*

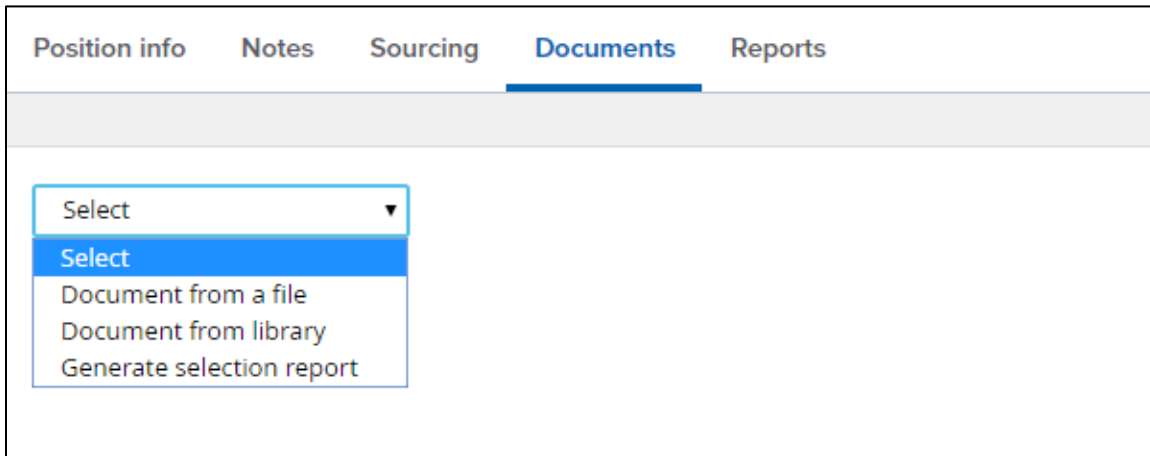
Use **Option 3** if no customization is required to the default settings. Default settings are:

- Reference Check Form is based on the position type.
 - **A&P and Search Committee (A&P)** - A&P Reference Questionnaire
 - **USPS, OPS and Search Committee (USPS)** - USPS & OPS Reference Questionnaire
 - **Faculty** - Faculty Reference Questionnaire
- Expiry date is set to 2 days. You can reinitiate the email request if the expiry date has passed.
- Standard email communication is sent.

Option 4: Manually call the referee and fill out Reference Form

Use **Option 4** if you wish to telephone the referee and ask the questions from the form.

- Reference Check Forms can be found on HR (A to Z Index).
- Upload the completed form on the job card (Document tab).



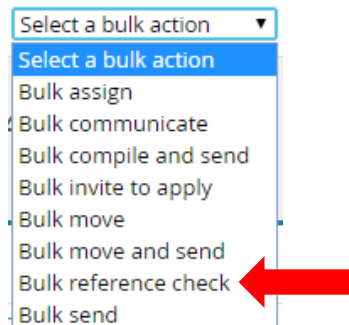
No further instructions for Option 4

Option 1: Bulk reference check

1. Check the **box** next to all applicants whose referees you would like to contact.

<input checked="" type="checkbox"/> All	Submitted	First name	Last name
<input type="checkbox"/>	18 Dec 2018	Walt	Zing
<input checked="" type="checkbox"/>	18 Dec 2018	Susan	Sunshine
<input checked="" type="checkbox"/>	18 Dec 2018	Jon	Snow
<input checked="" type="checkbox"/>	18 Dec 2018	Abbee	Camen

2. Select **Bulk reference check** from the drop-down menu.



3. Select the **Invitation expiry date**. The expiry date determines how long the referee must complete the reference check. The expiry date is included in the email to the referee. Once expired, the referee will not be able to submit their response. You can reinitiate the email request if it surpasses the expiry date.

4. Select the appropriate **Reference check form**.

Request reference check

Please fill in all mandatory fields marked with an asterisk (*).

Bulk action status: 2 Applicants Complete

You have requested to perform reference checks for 2 applicants.

Please select the expiry date for the reference check invitation:

Invitation expiry date:* ←

Please select the form you would like the reference to complete:

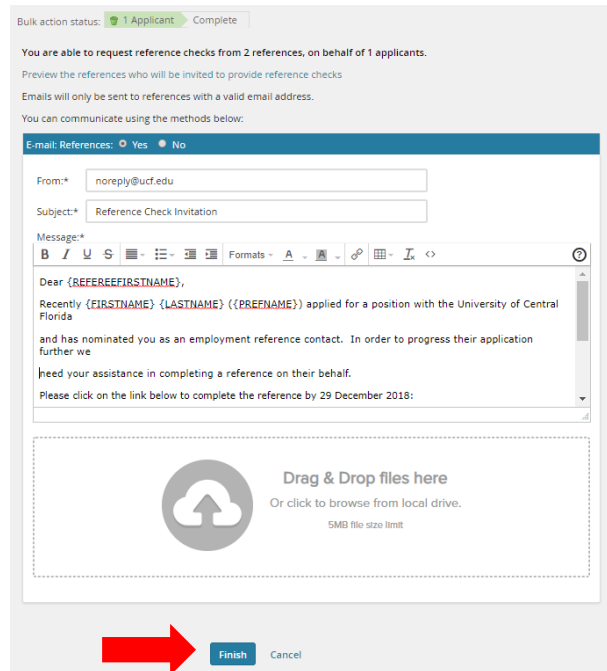
Reference check form:* A & P Reference Questionnaire ←

- Select
- A & P Reference Questionnaire
- Faculty Reference Questionnaire
- Letter of Recommendation/References
- USPS & OPS Reference Questionnaire

5. Click **Next**.



6. **Do NOT modify merge fields in email message.** If you prefer to add an attachment or custom questionnaire, click **Drag and Drop files here** to upload a document.



7. Click **Finish** to send invitation to referees.

Option 2: Send Reference Check form from Applicant Card

1. Open the applicant card and scroll to the **Applications** section.
2. Next to the relevant application, click **Actions** drop down and select **View References**.



3. The **Manage references** pop up window displays the references provided by the applicant.
4. To send a reference check to an individual reference click the **Send** link. The send link will appear for each referee who has not yet completed a reference check.
5. In the **Send** pop up window complete the following:
 - o Select from drop down the **Online reference check form**
 - o Indicate the **Expiry Days** - 2 days is recommended
 - o **E-mail from**
 - o **E-mail subject** - Reference Check Invitation
 - o **E-mail body** - Do NOT modify merge fields in email message.
 - o Click **Send** to trigger a reference check invitation email.

- At the *Manage references* page, a notification status of *Invited* or *Completed* displays.

Option 3: Change application status to Reference Check

1. The application status can be changed individually by clicking on the status.
2. Once the *Change application* status screen opens in a new window, select the **Reference Check** status.
3. Click **Next**. The position-specific reference form is sent to the referee(s) provided by the applicant for this application.

Submitted	Status	First name	Last name	Email
18 Dec 2018	Create Hire Documents	Jon	Snow	glossy11_3@ucf.edu
18 Dec 2018	Minimum Requirements Not Met	Walt	Zing	pupdown3+5@ucf.edu
18 Dec 2018	Phone screen scheduled	Susan	Sunshine	pupdown3+7@ucf.edu
18 Dec 2018	Phone screen scheduled	Abbee	Carmen	Abbee.Carmen@ucf.edu
19 Dec 2018	Phone screen scheduled	Michelle	Mills	rgudf+8@yahoo.com
8 Jan 2019	Phone screen scheduled	Sally	Dillon	Pupdown3+1@ucf.edu
9 Jan 2019	Create Hire Documents	Betty	Fredericks	pupdown3+1@ucf.edu

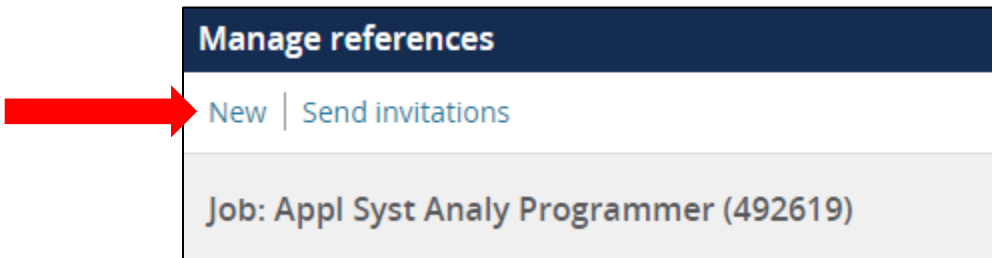
Manually Entering Reference Contact Information

If references are not provided on the application, you can manually enter the referee information into the applicant's record.

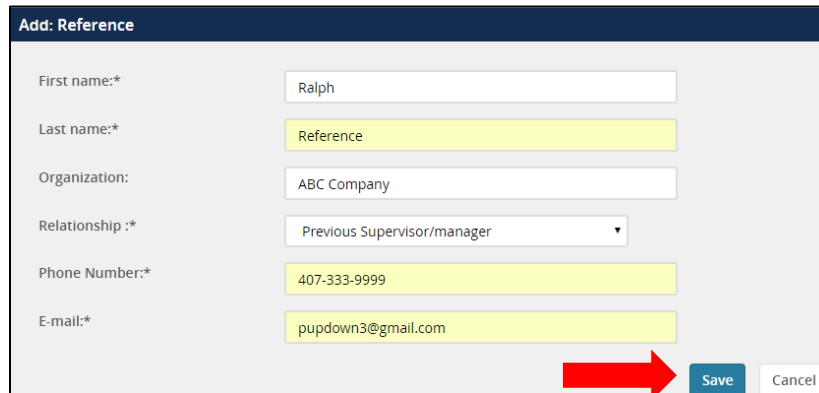
1. On the *Applicant Card*, click on the **Actions** drop-down menu listed next to the application.
2. Click **View references** from the drop-down menu.



3. At the top of the screen, select **New** to manually create a new referee.



4. Enter the **Reference** information. Click **Save**.



The screenshot shows the 'Add: Reference' form. The form has the following fields and values:

- First name:* Ralph
- Last name:* Reference
- Organization: ABC Company
- Relationship :* Previous Supervisor/manager
- Phone Number:* 407-333-9999
- E-mail:* pupdown3@gmail.com

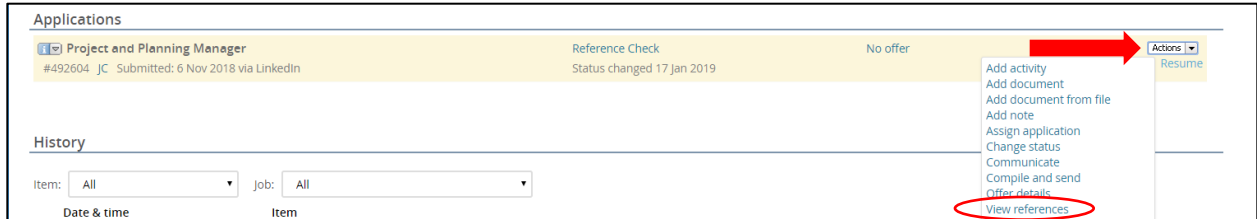
At the bottom right of the form, there are two buttons: 'Save' and 'Cancel'. The 'Save' button is highlighted with a red arrow.

Viewing completed references

There are several ways to view references completed by a referee:

Option 1: Open the applicant card and scroll to the **Application** section.

1. Click on the **Actions** drop-down and select **View references**.

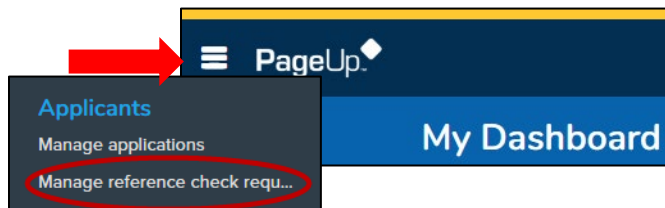


2. Confirm status is **Completed**, then click **Application & Forms**.

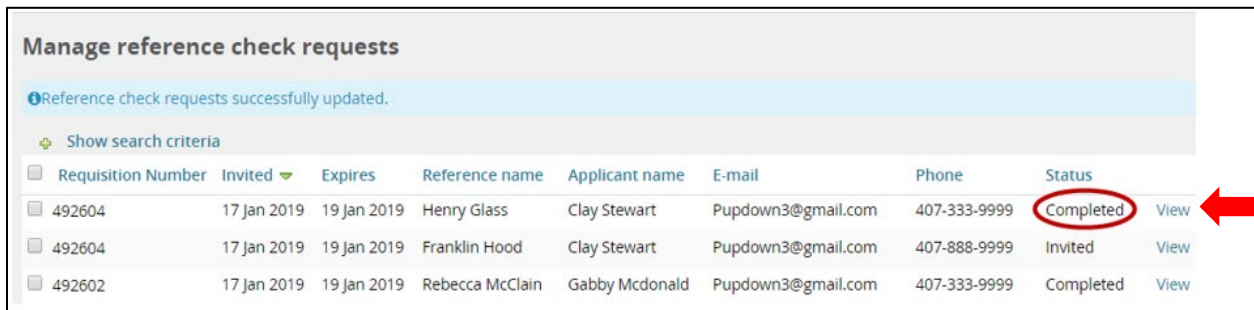
First name	Last name	Relationship	Status	Expiry	Score	Organization	Reference position	Phone Number	E-mail	Length of Tenure	
Henry	Glass	Current Supervisor/Manager	Completed	19 Jan 2019				407-333-9999	Pupdown3@gmail.com		Application & Forms Edit Control Archive
Franklin	Hood	Previous Supervisor/Manager	Invited	19 Jan 2019				407-888-9999	Pupdown3@gmail.com		Application & Forms Edit Control Resend Archive

3. View pop-up window to review responses.

Option 2: From the **Main Menu**  click **Manage reference check requests**.



1. From the **Manage reference check requests** screen, search for the applicant name and confirm status is marked as **Completed**, click **View** on the far-right side. A pop-up window will open to review reference.

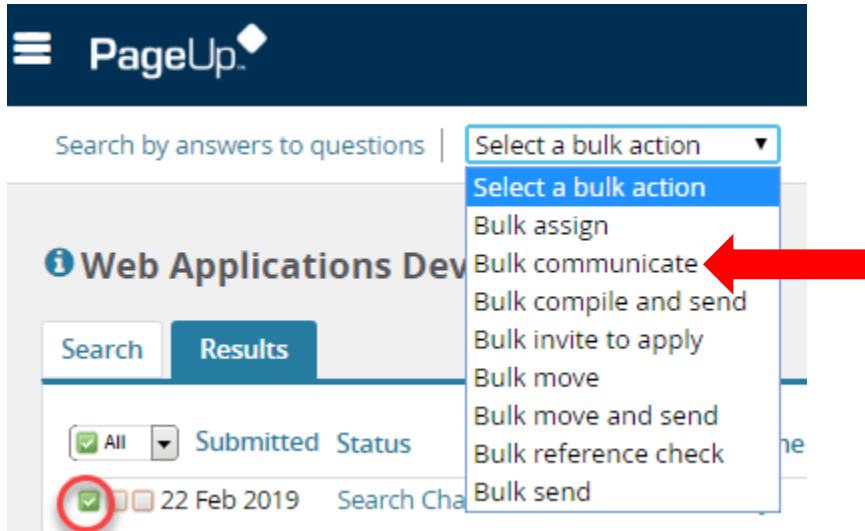


Requisition Number	Invited	Expires	Reference name	Applicant name	E-mail	Phone	Status	
492604	17 Jan 2019	19 Jan 2019	Henry Glass	Clay Stewart	Pupdown3@gmail.com	407-333-9999	Completed	View
492604	17 Jan 2019	19 Jan 2019	Franklin Hood	Clay Stewart	Pupdown3@gmail.com	407-888-9999	Invited	View
492602	17 Jan 2019	19 Jan 2019	Rebecca McClain	Gabby McDonald	Pupdown3@gmail.com	407-333-9999	Completed	View

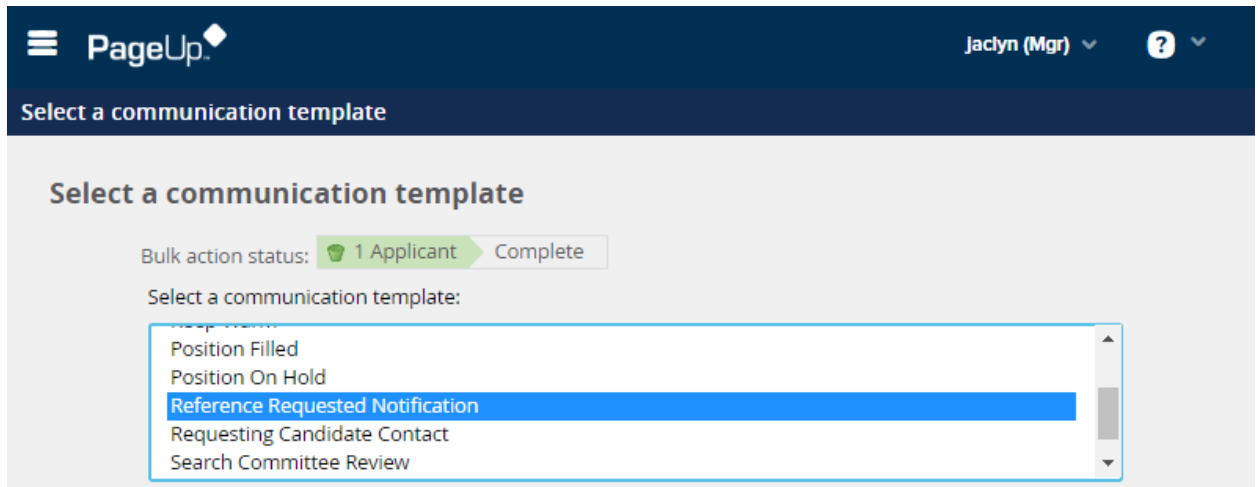
How to provide a Reference Requested Notification to the applicant

Moving the applicant to **Reference Check Requested** status triggers the email to referees, to notify applicants of this action you can send applicants a communication.

1. On the *Manage Applications* screen, check the box next to all applicants who you would like to notify of reference requested.
2. Select **Bulk Communication** from the *bulk action* drop-down menu.



3. Select **Reference Requested Notification** from communication template. Preview the email and click **Next**.



- Review the email and click **Send** once you have completed any necessary edits to send the email to the applicant.

Bulk action status: ✔ 1 Applicant Complete

You have requested to communicate with one person.

You can communicate using the methods below:

E-mail: Applicant: Yes No

From:*

Subject:* Reference requested for {JOBTITLE}

Message: Merge fields

B *I* U ~~S~~ ☰ ☰ ☰ ☰ ☰ ☰ ☰ ☰

Dear {FIRSTNAME},

We are pleased to inform you that we will be moving forward with the next stage of the recruitment process for Web Applications Developer with University of Central Florida.

As part of this process, we will be requesting two reference checks on your behalf. The reference checks will be requested based on the information you provided on your application. Each reference will receive an email with a link to answer a questionnaire. Once submitted, the reference will be added directly to your existing application packet.

We require a minimum of two references and the deadline for your references to respond is stated in the emails to your reference providers.

Please remember to inform your references that they will receiving an email at this point. You may forward this email which contains additional information about the position for which you have applied.

Kind regards,

The " From" field defaults to the User. This email address can be changed to a different UCF email address.

Merge fields are identified by the { } around the text and are auto-populated by the system. Do NOT edit.

The body of the message can be modified if necessary.

Search Committee/Panel

Search Committee/Panel

This functionality allows search committee members to review and rate applicants, with a Chairperson assigned to oversee the panel responses.


This functionality provides the following benefits:

- Provision of panel feedback
- Streamlined panel review and feedback process

1. Log in to PageUp at <https://ucf.pageuppeople.com>
2. From *My Dashboard*, Select **Search Committee & Additional Viewers**


My Dashboard

Welcome Jaclyn (Comm), this is your Dashboard where you will see all your tasks organized in various stages.




Position Description

My position description - Under review




New job

0 Jobs open
7 Team jobs open



Search Committee & Additional Viewers


3 Jobs requiring panel review



3. **Search Committee Chair** has the option to:
 - a. View applicants
 - b. View responses
 - c. View job
4. **Search Committee members** have the option to:
 - a. View applicants
 - b. View job

My search committee jobs

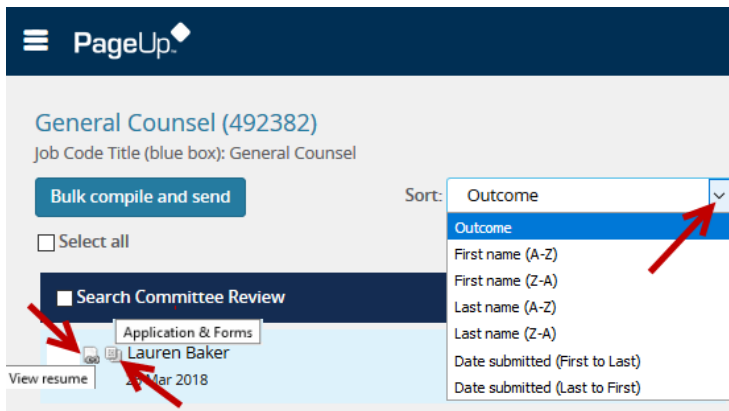
Job number	Date added	Status	Title	User	Total applications	Your role	
492607	2 Nov 2018	Reference checking	Assistant Professor	JM	2	Search Committee Member or Additional Viewer	View Applicants View responses View job



View Applicants

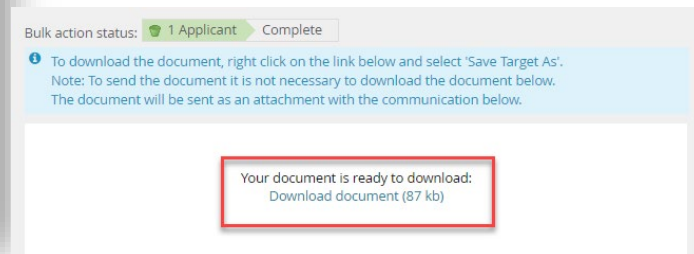
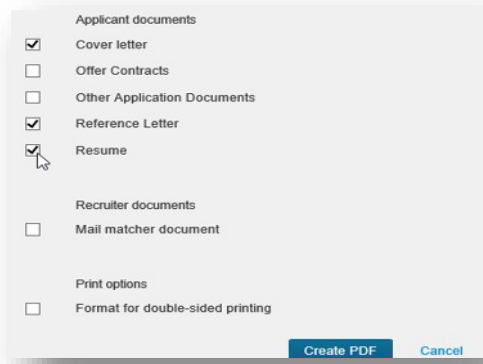
From the **My Search Committee Jobs**, find the title and click the **View Applicants** link. The *View Applicants* screen displays the *Job Title*, *Posting Number* and *Position Number*. Search committee members will be able to perform the following actions:

1. **Sort** by first name, last name, and date submitted. Applicants are grouped by application status.
2. Access an applicant’s resume by clicking on the **View Resume** icon.
3. Access an applicant’s application and application materials by clicking on the **Application & Forms** icon.

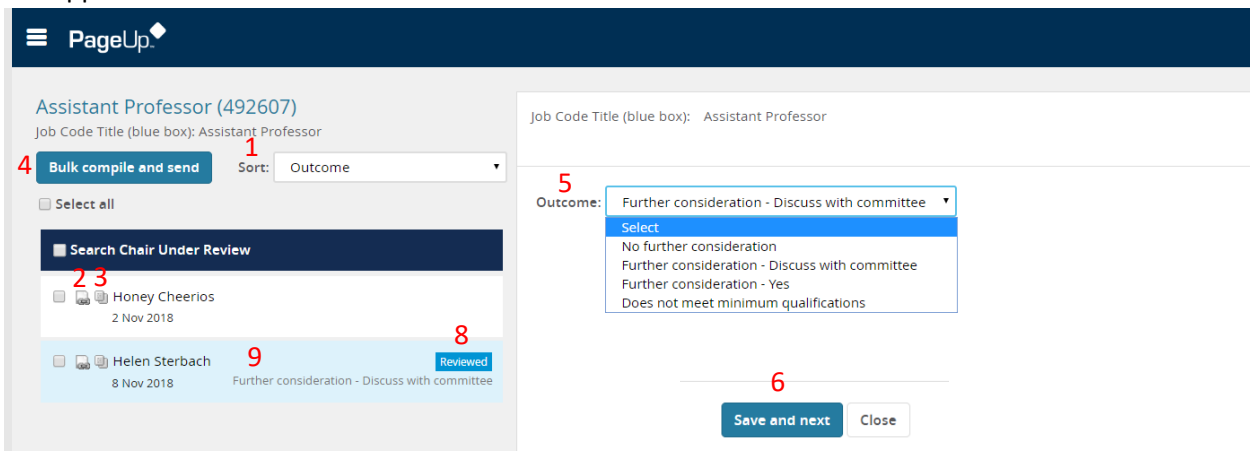


Both #2 and #3 above will open in another window, allowing multiple resumes and/or multiple application answers to be viewed at the same time.

4. To compile documents of multiple applicants into a single PDF using *Bulk Compile and Send*.
 - a. Check the box next to the name of all applicants to include in the PDF. Click the **Bulk Compile and Send** button.
 - b. Select all documents to include and click **Create PDF**.
 - c. Choose the following options:
 - **Download the PDF:** Click the **Download Document** link to open the PDF.
 - **Send PDF to others for review:** Select the name of the recipient user to send documents for review, enter information in the email form and edit as needed. Click **Okay** to send the email and return to the *View Applicant* screen.



5. To rate each applicant using the **Outcome** field, select one of the following options from the drop-down menus.
 - a. **No further consideration**
 - b. **Further consideration** – Discuss with committee
 - c. **Further consideration** – Yes
 - d. **Does not meet minimum qualifications**
6. To move to the next applicant, click on **Save and Next** or **Close** when you want to exit.
7. Your work is autosaved and allows for interruptions.
8. PageUp will update to show a *Reviewed* icon when you have reviewed an application.
9. The *Selection Criteria Outcomes* you chose when rating an applicant will display next to the applicant's name.

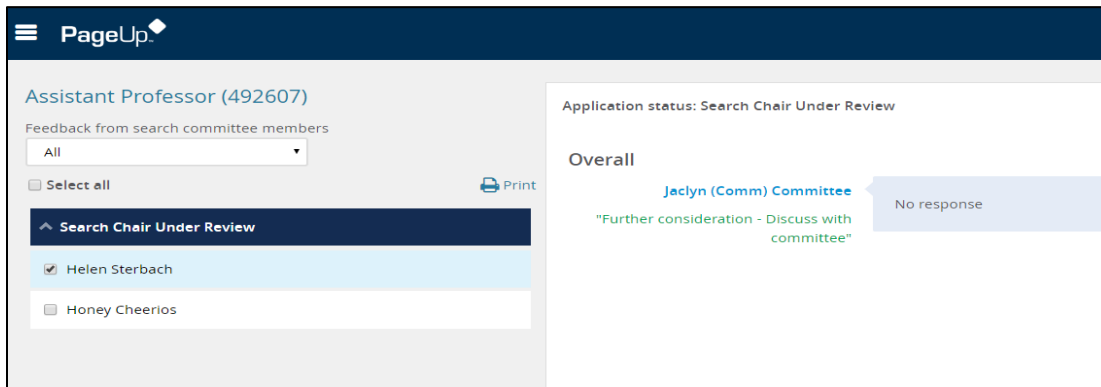


View Responses (Search Chair task ONLY)

The Search Committee Chair has access to view ratings from Search Committee Members. However, Search Committee Members DO NOT have access to view anyone else's application reviews.

To access Search Committee Member reviews as Chair:

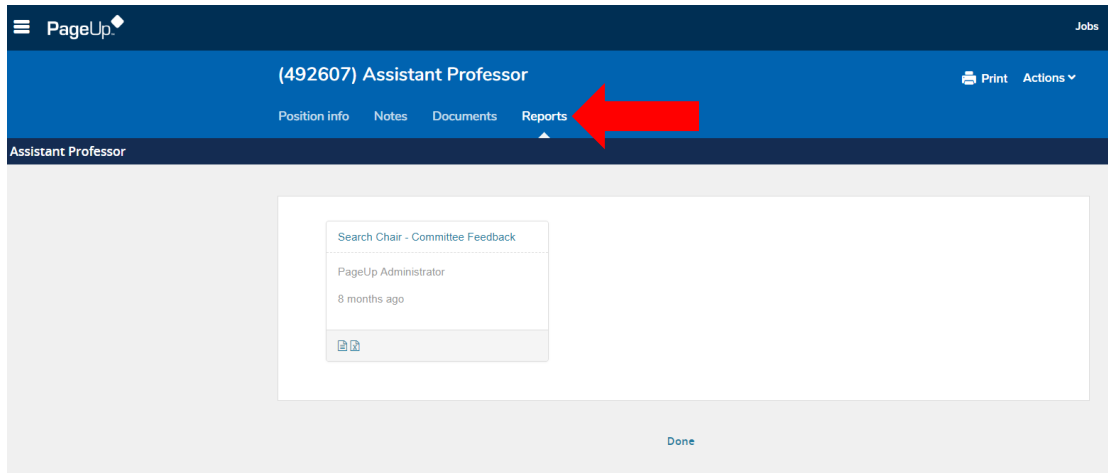
1. Click on **View Responses**
2. Click on an **applicant's name** to view Search Committee Members' reviews of that application.
3. Only applications that have been reviewed by a search committee member will be visible. You will see the *Selection Criteria* and overall *Selection Criteria Outcome* responses from the Search Committee Member(s) who reviewed the applicant.



View Job

Allows search committee members and chair to have *view* access to job information and job advertisement.

Search Committee Chair will have access to run a *Search Chair – Committee Feedback* report.



Offer Card

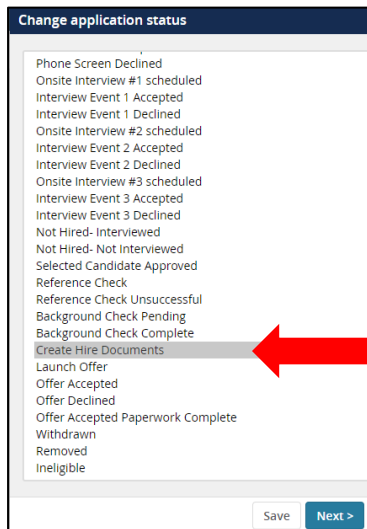
Offer Card

Create Hire Documents is utilized simply to record the final hire and to initiate a chain of events to activate their Onboarding Portal.

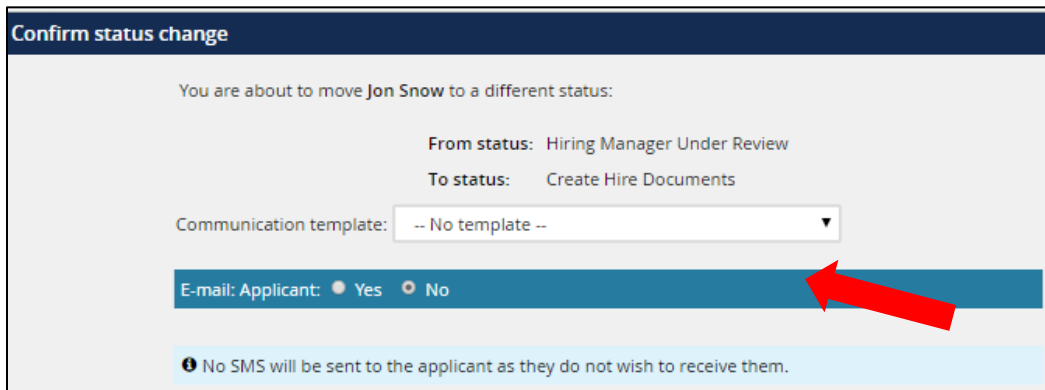
1. From the *Manage Applications* screen, click on the **current status** for the selected candidate.



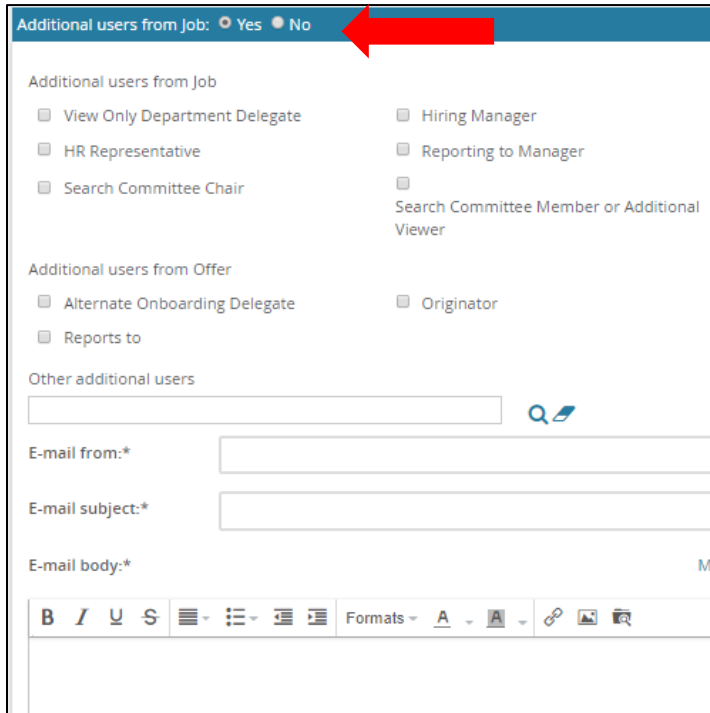
2. The *Change application status* screen opens in a new window. Select **Create Hire Documents**.



3. Click **Next**. The *Confirm status change* screen displays.
4. Ignore *Communication template* drop-down menu.
5. *E-mail Applicant leave as default - No* radio button



6. **Additional users from job** - Select **Yes** radio button if you wish to inform additional user(s) of status change by email. If not, select **No**.



Additional users from Job: Yes No

Additional users from Job

- View Only Department Delegate
- HR Representative
- Search Committee Chair
- Hiring Manager
- Reporting to Manager
- Search Committee Member or Additional Viewer

Additional users from Offer

- Alternate Onboarding Delegate
- Reports to
- Originator

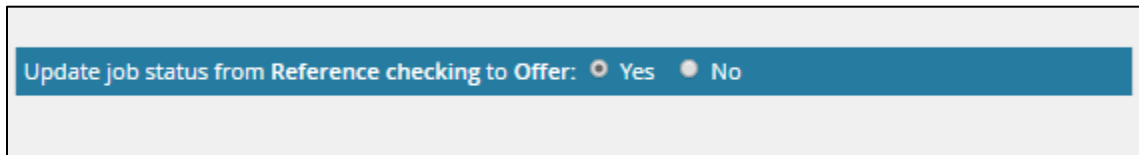
Other additional users

E-mail from:*

E-mail subject:*

E-mail body:*

7. **Update job status from Previous Status to Offer** – leave as default.



Update job status from Reference checking to Offer: Yes No

8. Click **Move now**. The *Offer details* screen will open in a new window. The *Offer details* screen includes the following sections:

- Personal details
- Job details
- Offer details
 - Approval Status
 - Position Details
 - Salary
 - Pre-Employment Checks
 - Onboarding
 - Offer Progress
- Offer Documents
- Application documents
- Approval process

Personal and Job details sections carry over from application and job card (View only)

Offer Details

Approval Status

Approval status will identify approval workflow status such as pending, approved, declined, and cancelled as well as information that will carry over from application and job card.

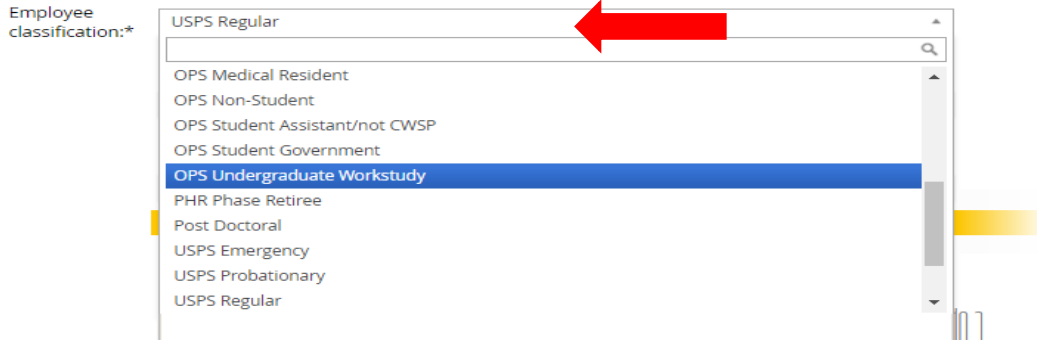
Position Details

1. Administrative Title: Add administrative title if position will have an administrative function
2. Job Code: unable to edit, will carry over from application and job card
3. Employee ID: add if applicable
4. Start date: Input desired start date
5. End date: If applicable
6. New Employee Orientation date – if internal hiring type 1111 in date field
7. Type of appointment: Will default from job card

FACULTY, USPS or A&P POSITION DETAILS

1	Administrative Title:	<input type="text"/>
2	Job Code:	Senior Secretary Job No: 118 ▼
3	Employee ID:	<input type="text"/>
4	Start date:*	<input type="text" value="8 Apr 2019"/>
5	End date if applicable:	<input type="text"/>
6	Orientation Date:*	<input type="text" value="12 Apr 2019"/>
<p>Please schedule New Hire to attend Orientation on first available date after hire date. For OPS positions or internal hires, please enter "1111". This will update the date to be January 11, 2011, as orientation is not applicable.</p> <p>New Employee Orientation Schedule</p>		
7	Type of appointment:*	<input type="text" value="Regular"/> ▼

8. Employee classification: **make selection** from drop down-menu



- 9. Exemption status: **make selection** from drop down-menu - field is required.
- 10. Union code: **make selection** from drop down-menu - field is not required.
- 11. Budget entity: **make selection** from drop down-menu - field is not required.
- 12. Liability Account #: Department responsible for budget of position - field is required.
- 13. Pay group: **make selection** from drop down-menu - field is required.

Salary

- 1. Annual salary: required field
- 2. Shift rate: applies to designated USPS positions working 2nd and 3rd shift.
 - a. **Enter the total annualized amount** of shift rate.
 - For example: Annual salary of \$25,000 at 5% shift rate = \$1,250
 - 2nd Shift rate is calculated at 5% of the pay.
 - 3rd Shift rate is calculated at 10% of the pay.
 - b. The *Shift rate* should not be included in the annual salary field.

1 Annual salary:*

Enter 0 for Temporary OPS positions (excluding Post-Docs and Medical Residents) and include a hourly pay rate in field below for OPS hourly student/non-student positions.

2 Shift Rate:

Shift rate only applies for designated USPS positions for 2nd and 3rd shifts.

Pre-Employment Checks

Background screening is required for all employees except for undergraduate students or internal moves where the screen was previously completed. All expenses for processing background checks will be charged directly to the respective hiring department.

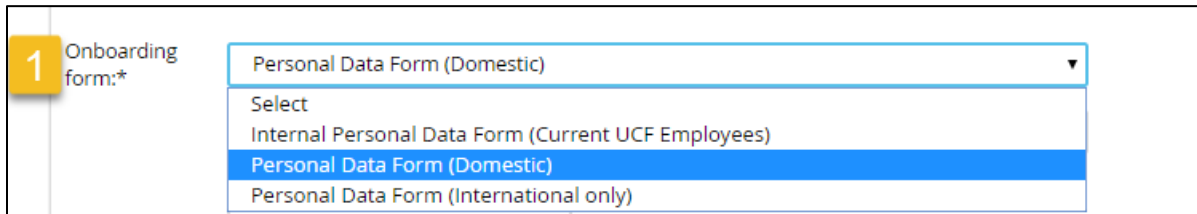
Background Screening radio button: Select **Yes** or **No**

Background screening: Yes No

Background screening is required for all employees with the exception of undergraduate students or transfer or internal moves where the screen was previously completed

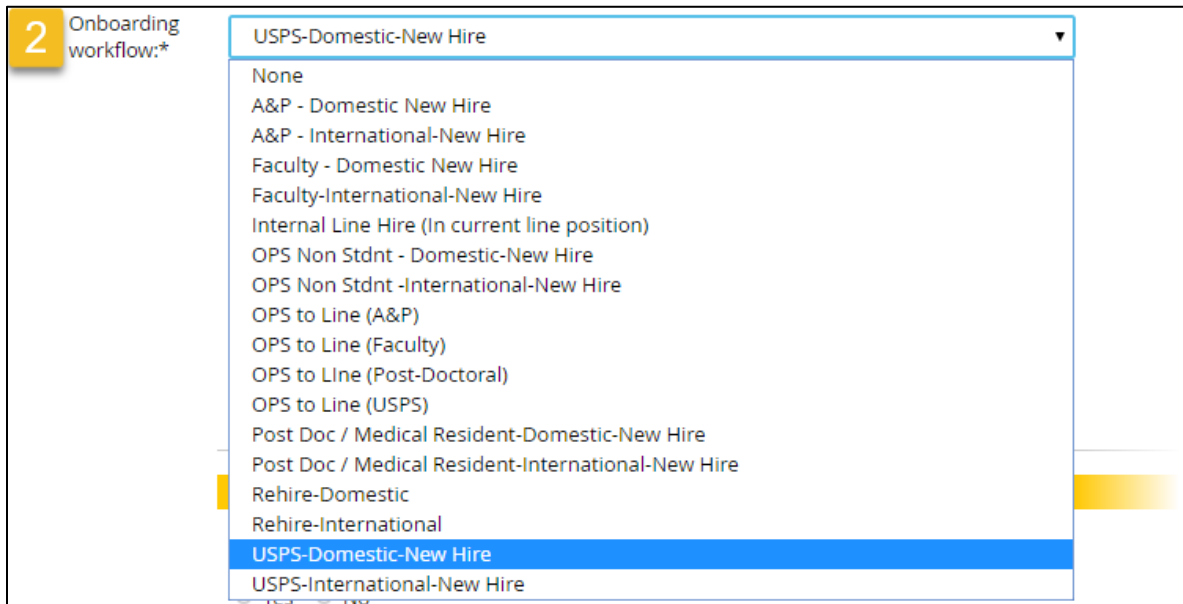
Onboarding

1. Onboarding form: **make selection** from drop-down menu.
 - a. *Internal Personal Data Form* (Current UCF Employees) - internal moves
 - b. *Personal Data Form Domestic* – new hires and hires of previous employees with a break in service
 - c. *Personal Data Form (International Only)*



A screenshot of a web form labeled '1 Onboarding form:*'. A dropdown menu is open, showing the following options: 'Personal Data Form (Domestic)' (selected), 'Select', 'Internal Personal Data Form (Current UCF Employees)', 'Personal Data Form (Domestic)', and 'Personal Data Form (International only)'.

2. Onboarding workflow: **make selection** from drop-down menu - field is required.



A screenshot of a web form labeled '2 Onboarding workflow:*'. A dropdown menu is open, showing a long list of options including: 'USPS-Domestic-New Hire' (selected), 'None', 'A&P - Domestic New Hire', 'A&P - International-New Hire', 'Faculty - Domestic New Hire', 'Faculty-International-New Hire', 'Internal Line Hire (In current line position)', 'OPS Non Stdnt - Domestic-New Hire', 'OPS Non Stdnt -International-New Hire', 'OPS to Line (A&P)', 'OPS to Line (Faculty)', 'OPS to Line (Post-Doctoral)', 'OPS to Line (USPS)', 'Post Doc / Medical Resident-Domestic-New Hire', 'Post Doc / Medical Resident-International-New Hire', 'Rehire-Domestic', 'Rehire-International', and 'USPS-International-New Hire'.

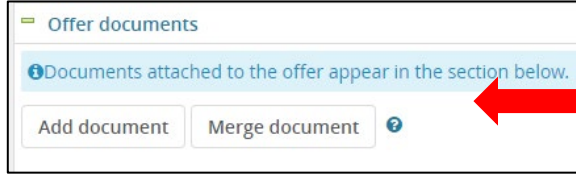
3. Reports to: **Use lookup icon** to find Supervisor.
4. Onboarding Delegate: Supervisor and Onboarding Delegate users will have access to the new hire task list and are responsible for ensuring the candidate and the department complete all assigned tasks. Therefore, Supervisor and Onboarding Delegate selections should be made appropriately.
5. Alternate Onboarding Delegate (Optional): The Alternate Onboarding Delegate will not receive email reminders regarding incomplete onboarding tasks.

Offer Progress

Fields will be automatically updated by the system.

Offer Documents

1. Click **Merge document** and select an Offer/Welcome letter or agreement to send to candidate from document library.



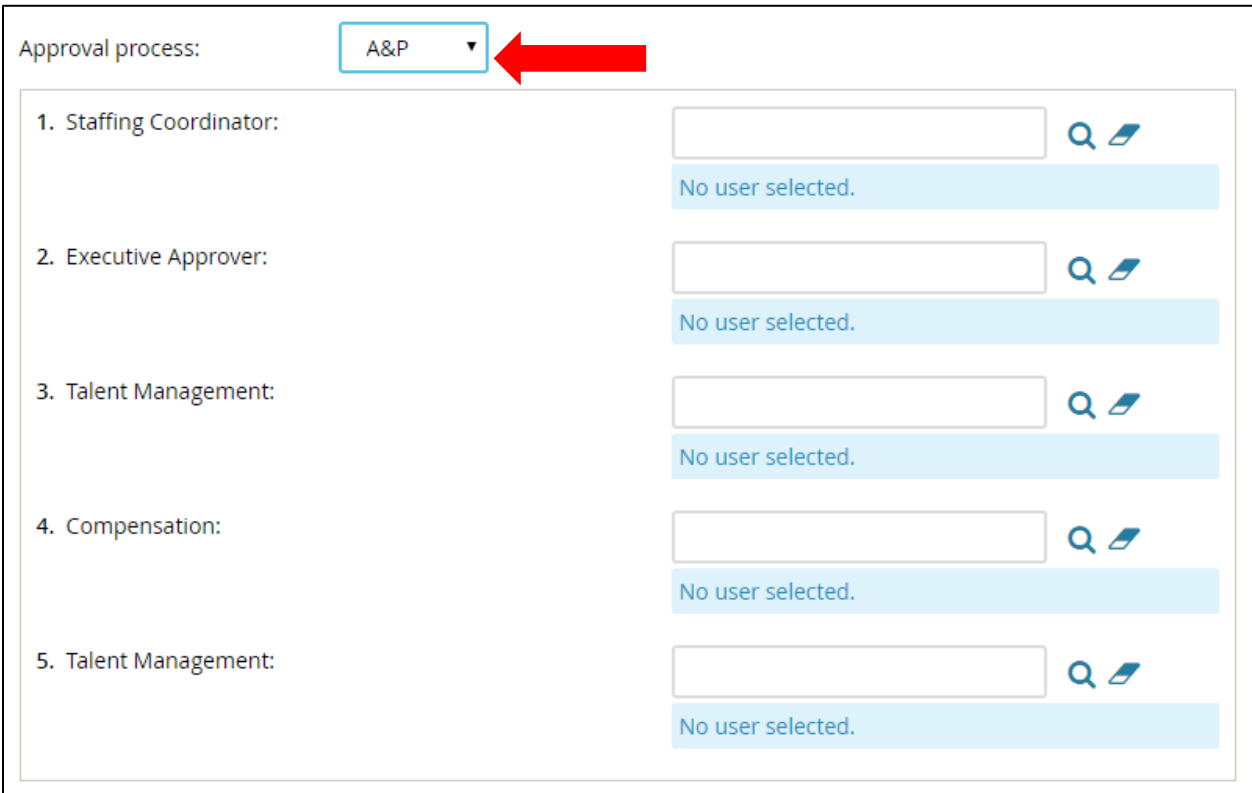
2. You can also click **Add document** to upload, such as an addendum or an agreement.
 - a. Please upload the Relocation allowance paperwork if applicable
3. Pop up message may appear, click **ok**.

Application documents

Section will display all documents attached

Approval process

1. Originator: Field will default to person who originated the offer card.
2. Approval process: **Select from drop down menu** – for example, *A&P*.



3. Approval workflow

- a. An email will be sent to the first approver, informing them of the approval request. The user will need to log in to the system to review the offer and approve. Once they have approved the next person in the workflow will receive an email. The approval process is sequential.
- b. The originator will receive an email when the offer is approved and if at any point in the process a user declines the approval. This section will track the progress.
- c. Use Point of Contact for fields above.

Save & Close: Saves and submits job card for approval workflow. Page closes and brings you back to PageUp **My Dashboard** home page.

Save: Saves and submits job card for approval workflow. Page remains open.

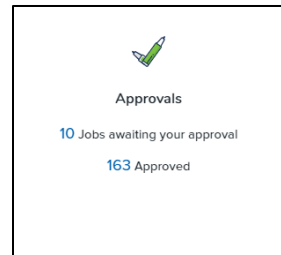
Cancel: Cancels and deletes information entered.

Approving a Job Card & an Offer Card

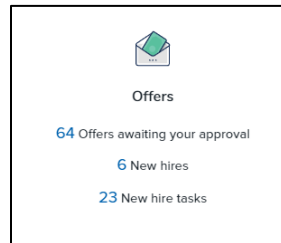
Approving a Job Card & an Offer Card

System emails are automatically sent when a Job Card or an Offer Card is awaiting your approval. From your Home Screen, you will see links to the actions pending approval.

The link to Job Cards pending approval will be found in



The link to Offer Cards pending approval will be found in



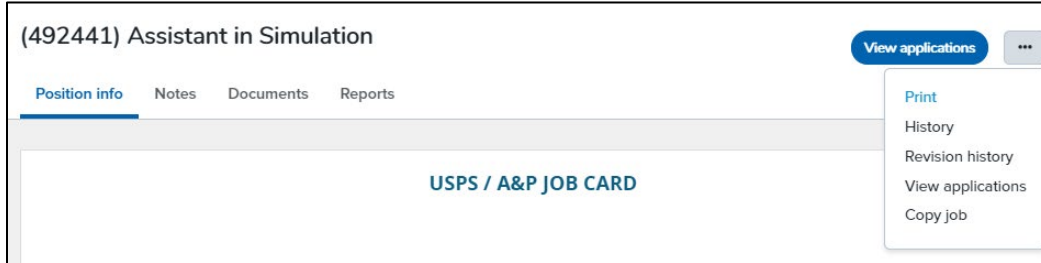
Approving a Job Card

The email will have instructions on how to approve the job; you can do this either by replying to the email with the word **Approve** or you can login and do this from the Job Card. Once you have click on the link **Jobs awaiting your approval**, click **View** next to the job you are approving and review the details.

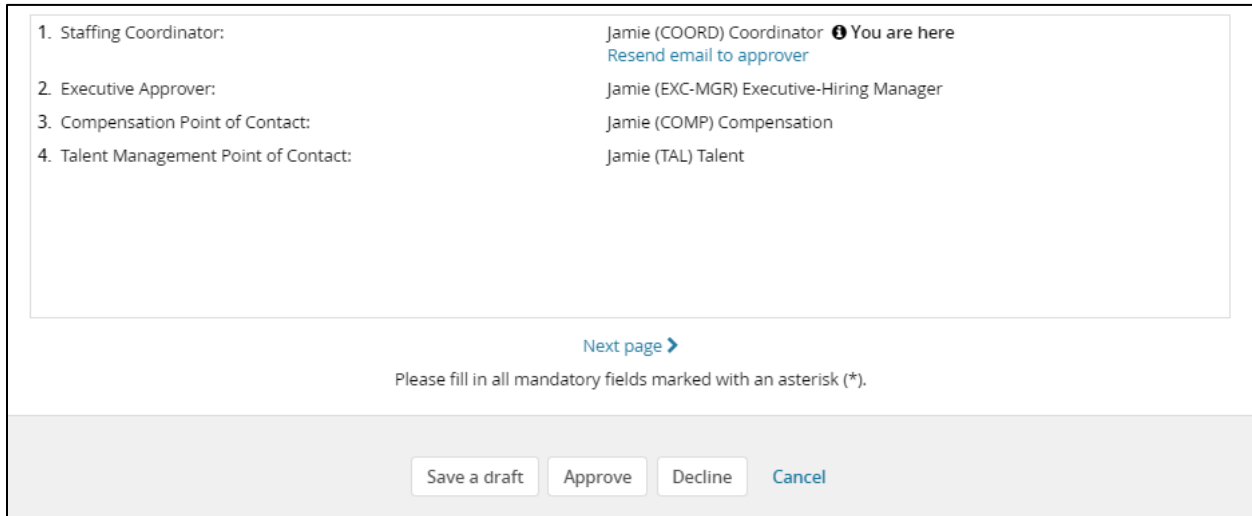
Manage approvals						
Approval status						
Pending						Clear Search
Date raised	Job No.	Job title	Hiring Manager	New	Replacement	
18 Mar 2019	492669	OPS - Clerk	Jaclyn (Coord) Coordinator			View
19 Feb 2019	492651	Assistant Professor	Jamie (Mgr) Manager	0	0	View
19 Feb 2019	492652	Asoc General Counsel*	Jamie (Mgr) Manager			View
9 Aug 2018	492569	OPS Not Advertised	Jamie (Mgr) Manager	10	0	View
9 Aug 2018	492570	OPS NOT REQUIRED TO BE ADVERTISED	Jamie (Mgr) Manager	10	0	View
30 Jul 2018	492563	Office Manager*	Jamie (Mgr) Manager	0	0	View
26 Jul 2018	492560	Account Representative	Jamie (Mgr) Manager	0	0	View
30 Mar 2018	492457	Asoc General Counsel	Jamie (Mgr) Manager	0	0	View
22 Mar 2018	492441	Assistant in Simulation	Jamie (Mgr) Manager	0	0	View
13 Mar 2018	492422	Assistant Dean Graduate Studies	Jamie (Mgr) Manager	6	0	View



You can click through the tabs of the requisition to view attached documents and notes, if any. You can also look at History and Revision at the top of the page to see if any changes were made throughout the approval process.



As you scroll down the page you will see position information, committee details, and advertising details. At the very bottom of the Job Card are the approve and decline buttons. You will see your name as well as the names of the remaining approvers. Click Approve.



Declining a job

Select My job approvals on the right-hand menu again. Click **View** next to the job you are declining and scroll down to the bottom of the page. Click **Decline**.

A pop-up requesting a reason for your decline will be displayed – this is mandatory. Save.

Restart an approval process

In the approval section of the requisition, click **Cancel**.

A pop-up will appear requesting a reason for canceling and restarting the approval process. Fill this in and select a new approval process.

Assigning a different approver

Depending on your permission group you may be able to assign a different approver for a particular point of the approval process. Back in the approval section of the requisition, click **Edit**.

A pop-up will appear showing the approvers for this job. If you have permission, you will be able to clear a name from any box where the approver has not yet approved and add a different user.

Approving an Offer Card

Select My offer approvals on the right-hand menu. Click **View** next to the offer you are an approver for and review the details of the offer. If you scroll down to the bottom of the offer details page you will see approve/decline buttons. You will also see your name listed as an approver as well as the names of the remaining approvers. Click **Approve**. On the Manage offer approvals page, the information panel displays that the job has been approved.

An offer is not approved until it has completed the approval process. Changes or comments can be added at any point during the approval process. Any user in the approval process can decline the offer (a reason is required).

Declining an offer

Select Manage offer approvals on the right-hand menu again. Click View next to the job you are an approver for and scroll down to the bottom of the page. Click Decline. A pop-up requested a reason for your decline will be displayed and this is mandatory. Save.

Restart an approval process

In the approval section of the offer card, click Cancel. A pop-up will appear requesting a reason for canceling. You will then need to select Restart to create a new approval process. Fill this in and select a new approval process.

Application Statuses with Email Notification

“Incomplete” status

Email communication will go out to potential applicants who started their application but did not complete it. The email will advise them to complete their application two (2) days after not completing and/or two (2) days before the position closes.

“Hiring Manager Under Review” status

Email communication will go out to applicants thanking them for their application submission. Email will have job title included.

“Search Committee Under Review” status

Email communication will go out to applicants thanking them for their application submission. Email will have job title included.

“Not Hired – Not Interviewed” status

Email communication will be sent to applicants placed in this status letting them know they are no longer under consideration.

“On Hold” status

No email is system generated. If you have alternate candidates, you interviewed for the position you can move up to three (3) alternate candidates to the “On Hold” status in PageUp to prevent the alternate candidates from receiving the non-selection email. When the approved selected candidate accepts the position, Talent will disposition the alternate candidates as “Not Hired – Interviewed (Alternate Candidate)” unless notified otherwise.

“Not Hired – Interviewed” status

Email communication will be sent to applicants placed in this status letting them know they are no longer under consideration.

Application Status

These are the stages applicants will go through following the submission of their application.

A&P & OPS

1. **Hiring Manager Under Review**

Review: Applicants will automatically default to this status when the applicant has successfully applied to the position.

2. **Minimum Requirements Not Met**

Applicants will automatically default to this status if they answered a supplemental question in a disqualifying way.

3. **Not Hired – Not Interviewed:**

You will need to disposition applicants who are not moving onto the interviewing process. An email will be sent to the applicants notifying them they are no longer under consideration.

4. **Interview 1, 2 & 3:** Regardless of method of interview (phone, skype, or face-to-face) You will move the candidate along the interview process.

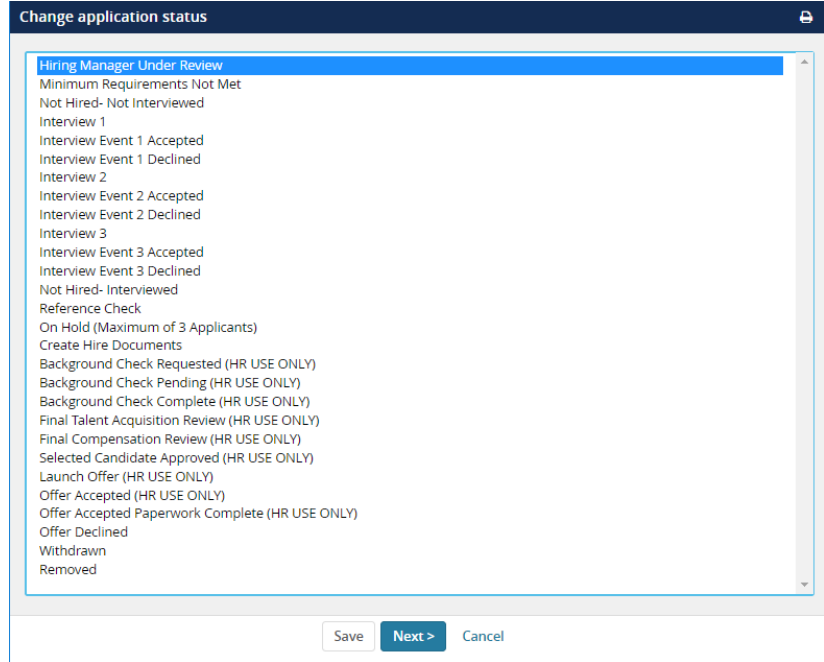
5. **Interview Accepted/Declined 1, 2, & 3:** If Creating Events on PageUp, this status will automatically default to accepted or declined depending on the applicant’s selection.

6. **Not Hired – Interviewed:** You will need to disposition applicants who are interviewed and not selected to move forward in your search. An email will be sent to the applicants notifying them they are no longer under consideration.

7. **Reference Check:** You can add, edit, and review the referee details and trigger the request to complete the employment reference check through PageUp.

8. **On Hold (Maximum of 3 Applicants):** This allows you to move 3 applicants to on hold as alternate candidates for the position, in case the selected candidate declines. The candidates on hold will not receive an email until the position is closed.

9. **Create Hire Documents:** The offer card is typically the first point for initiating approval for an offer process on an applicant.



USPS

1. Hiring Manager Under Review

Review: Applicants will be released to this status by the Talent dept. on the Friday morning after the position closes. Preferences will be reviewed and flagged.

2. Minimum Requirements Not Met

Applicants will automatically default to this status if they answered a supplemental question in a disqualifying way.

3. Not Hired – Not Interviewed:

You will need to disposition applicants who are not moving onto the interviewing process. An email will be

sent to the applicants notifying them they are no longer under consideration.

4. Interview 1, 2 & 3:

Regardless of method of interview (phone, skype, or face-to-face) You will move the candidate along the interview process.

5. Interview Accepted/Declined 1, 2, & 3:

If Creating Events on PageUp, this status will automatically default to accepted or declined depending on the applicant's selection.

6. Not Hired – Interviewed:

You will need to disposition applicants who are interviewed and not selected to move forward in your search. An email will be sent to the applicants notifying them they are no longer under consideration.

7. Reference Check:

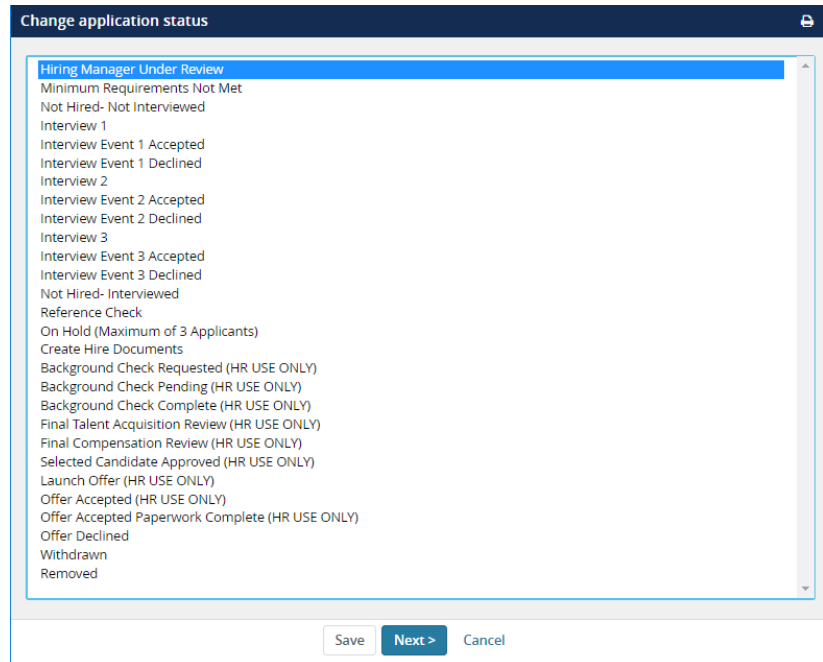
You can add, edit, and review the referee details and trigger the request to complete the employment reference check through PageUp.

8. On Hold (Maximum of 3 Applicants):

This allows you to move 3 applicants to on hold as alternate candidates for the position, in case the selected candidate declines. The candidates on hold will not receive an email until the position is closed.

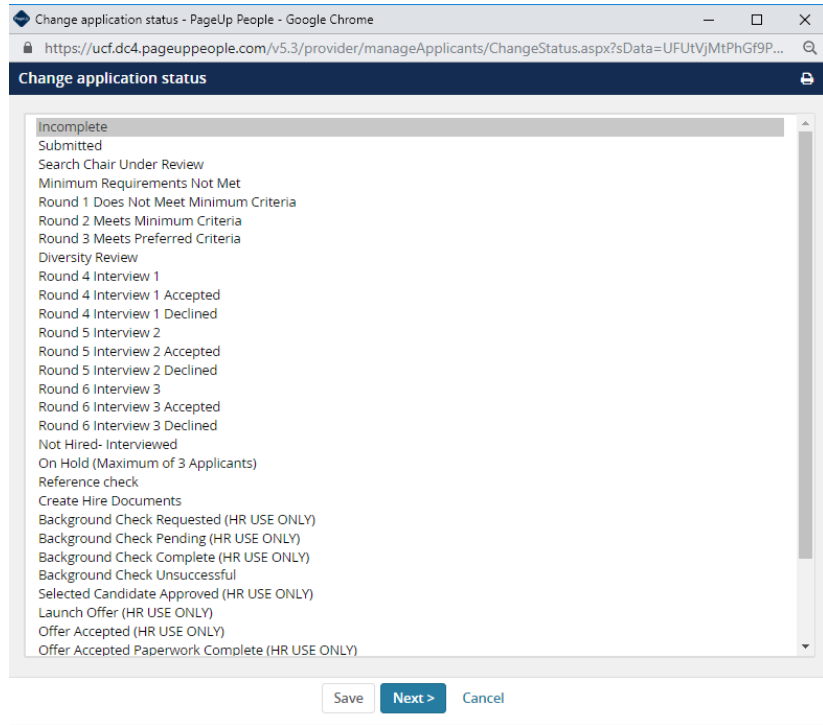
9. Create Hire Documents:

The offer card is typically the first point for initiating approval for an offer process on an applicant.



Faculty & Search Committee (A&P)

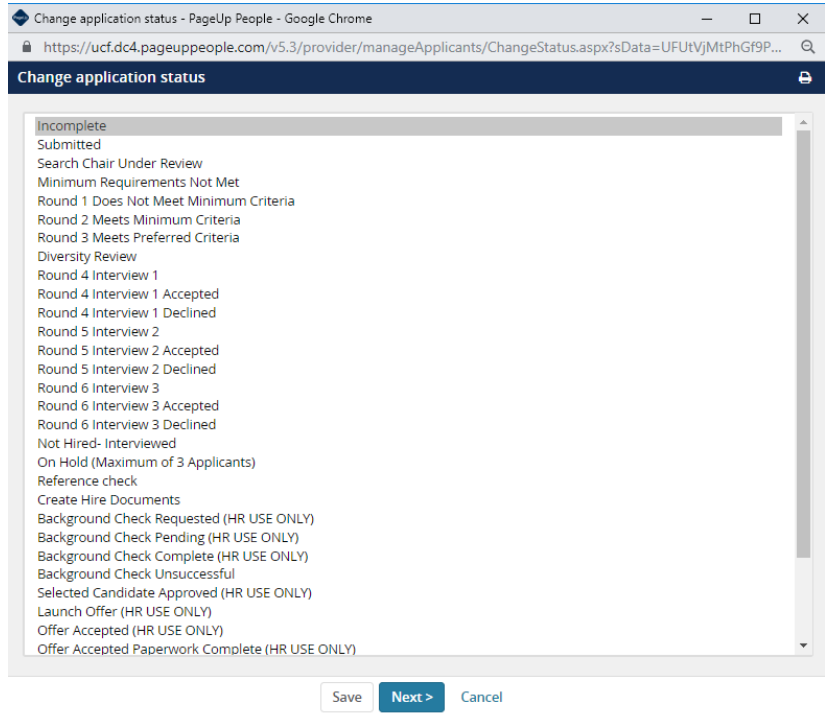
1. **Search Chair Under Review:** Applicants will automatically default to this status when the applicant has successfully applied to the position.
2. **Minimum Requirements Not Met:** Applicants will automatically default to this status if they answered a supplemental question in a disqualifying way.
3. **Round 1 Does Not Meet Minimum Criteria:** You will need to disposition applicants who do not meet minimum criteria and who are not moving onto the next round. An email will be sent to the applicants notifying them they are no longer under consideration.



4. **Round 2 Meets Minimum Criteria:** You will need to disposition applicants who meet minimum criteria but do not have the preferences you requested and who are not moving onto the next round. An email will be sent to the applicants notifying them they are no longer under consideration.
5. **Round 3 Meets Preferred Criteria:** You will need to disposition applicants who meet preferred criteria but who are not moving onto the next round. An email will be sent to the applicants notifying them they are no longer under consideration.
6. **Round 4, 5, & 6:** Regardless of method of interview (phone, skype, or face-to-face) You will move the candidate along the interview process.
7. **Round Accepted/Declined 4, 5, & 6:** If Creating Events on PageUp, this status will automatically default to accepted or declined depending on the applicant's selection.
8. **Not Hired – Interviewed:** You will need to disposition applicants who are interviewed and not selected to move forward in your search. An email will be sent to the applicants notifying them they are no longer under consideration.
9. **Reference Check:** You can add, edit, and review the referee details and trigger the request to complete the employment reference check through PageUp.
10. **On Hold (Maximum of 3 Applicants):** This allows you to move 3 applicants to on hold as alternate candidates for the position, in case the selected candidate declines. The candidates on hold will not receive an email until the position is closed.
11. **Create Hire Documents:** The offer card is typically the first point for initiating approval for an offer process on an applicant.

Search Committee (USPS)

1. **Search Chair Under Review:** Applicants will be released to this status by the Talent dept. on the Friday morning after the position closes. Preferences will be reviewed and flagged.
2. **Minimum Requirements Not Met:** Applicants will automatically default to this status if they answered a supplemental question in a disqualifying way.
3. **Round 1 Does Not Meet Minimum Criteria:** You will need to disposition applicants who do not meet minimum criteria and who are not moving onto the next round.



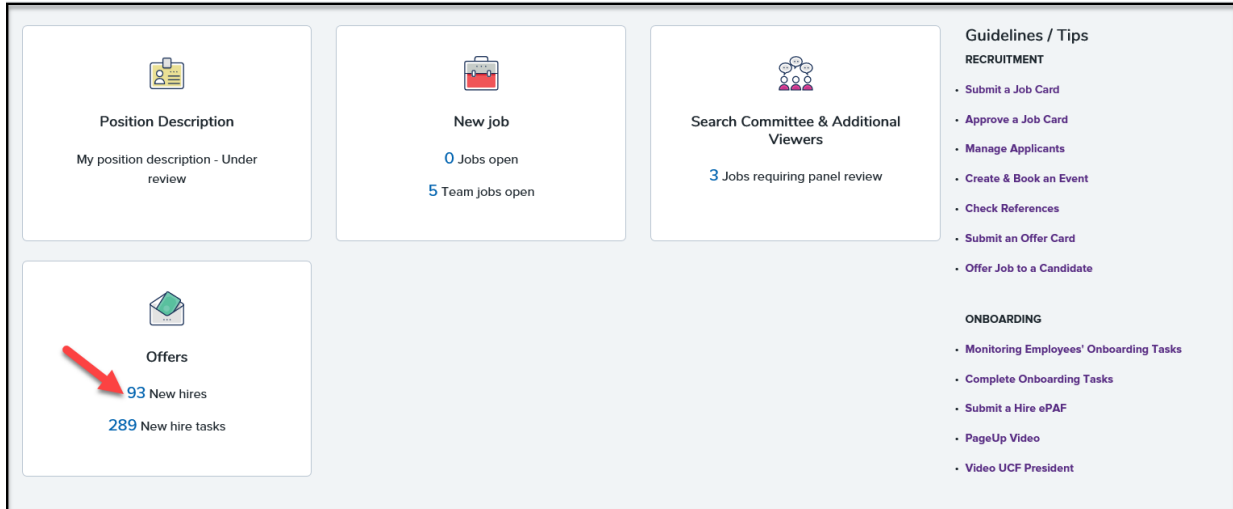
- An email will be sent to the applicants notifying them they are no longer under consideration.
4. **Round 2 Meets Minimum Criteria:** You will need to disposition applicants who meet minimum criteria but do not have the preferences you requested and who are not moving onto the next round. An email will be sent to the applicants notifying them they are no longer under consideration.
 5. **Round 3 Meets Preferred Criteria:** You will need to disposition applicants who meet preferred criteria but who are not moving onto the next round. An email will be sent to the applicants notifying them they are no longer under consideration.
 6. **Round 4, 5, & 6:** Regardless of method of interview (phone, skype, or face-to-face) You will move the candidate along the interview process.
 7. **Round Accepted/Declined 4, 5, & 6:** If Creating Events on PageUp, this status will automatically default to accepted or declined depending on the applicant's selection.
 8. **Not Hired – Interviewed:** You will need to disposition applicants who are interviewed and not selected to move forward in your search. An email will be sent to the applicants notifying them they are no longer under consideration.
 9. **Reference Check:** You can add, edit, and review the referee details and trigger the request to complete the employment reference check through PageUp.
 10. **On Hold (Maximum of 3 Applicants):** This allows you to move 3 applicants to on hold as alternate candidates for the position, in case the selected candidate declines. The candidates on hold will not receive an email until the position is closed.
 11. **Create Hire Documents:** The offer card is typically the first point for initiating approval for an offer process on an applicant.

Onboarding Delegate: Monitoring Employees' Onboarding Tasks

Step 1 - Log in to PageUp at <https://ucf.pageuppeople.com>

PAGEUP DASHBOARD

Step 2 – Under Offers, select the number next to New hires.



The screenshot shows the PageUp dashboard with several key metrics:

- Position Description:** My position description - Under review
- New job:** 0 Jobs open, 5 Team jobs open
- Search Committee & Additional Viewers:** 3 Jobs requiring panel review
- Offers:** 93 New hires (highlighted with a red arrow), 289 New hire tasks

On the right side, there is a 'Guidelines / Tips' section with two categories:

- RECRUITMENT:**
 - Submit a Job Card
 - Approve a Job Card
 - Manage Applicants
 - Create & Book an Event
 - Check References
 - Submit an Offer Card
 - Offer Job to a Candidate
- ONBOARDING:**
 - Monitoring Employees' Onboarding Tasks (highlighted with a red arrow)
 - Complete Onboarding Tasks
 - Submit a Hire ePAF
 - PageUp Video
 - Video UCF President

Select Name

Step 3 – Locate the employees name, and to the far right, select View all Tasks.

My new hires

Applicant first name	Applicant last name	Requisition Number	Title	Application status	
Walt	Zing	492598	Senior HR Representative	Launch Offer	View offer details
Walt	Zing	492613	Senior Telecomm Services Speci	Offer Accepted Paperwork Complete	View offer details View all tasks

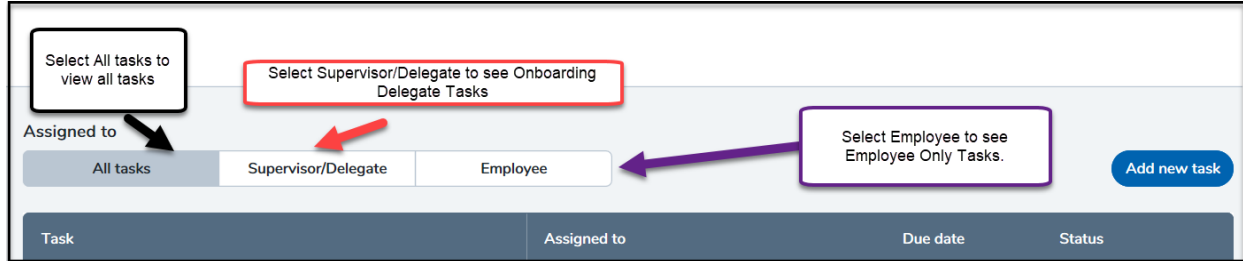
View Status of Employee's Onboarding Tasks

It's very important as the onboarding delegate that you verify that the employees are completing their tasks timely. The Hire ePAF cannot be approved until the "Before the First Day" and "Before Or On Your First Day" onboarding tasks are completed. Please follow-up with the employees if the tasks have not been completed.

Step 4 –You will see a dashboard of the new hires' and supervisors/onboarding delegate tasks. Tasks are grouped by due date (Before Your First Day, Before Or On Your First Day, Your First Week, Your First Month).

There are tasks specific for the employee to complete, specific of the onboarding delegate/supervisor to complete, and there are joint tasks such as the completion of the I-9

Form which both employee and onboarding delegate must complete. New Hires and Onboarding Delegate/Supervisor will receive one reminder email a couple of days before the task is due.



Confirm that the employee has completed their tasks by reviewing the status column on each task.

Task	Assigned to	Due date	Status
Before Your First Day Add			
Complete Section 1 of Electronic I9	Onboarding Ucf	16 Dec 2018	Overdue
Complete 3- in-1 Form	Onboarding Ucf	16 Dec 2018	Completed
Complete the Loyalty Oath	Onboarding Ucf	16 Dec 2018	Completed
Instructions on Uploading Onboarding Documents	Onboarding Ucf	16 Dec 2018	Overdue
Acknowledge Pre-Employment Notices	Onboarding Ucf	16 Dec 2018	Completed
Complete Employee Acknowledgement Form	Onboarding Ucf	16 Dec 2018	Overdue
Complete Retirement Status Notification Form	Onboarding Ucf	16 Dec 2018	Overdue
Disclose Relatives at UCF	Onboarding Ucf	16 Dec 2018	Overdue
Review Health Insurance Marketplace Notice	Onboarding Ucf	16 Dec 2018	Overdue
Review Drug Free Workplace Policy Statement	Onboarding Ucf	16 Dec 2018	Overdue

Status Key

- Open = Task has not been completed but is not overdue
- Completed = Task has been completed
- Overdue = Task has not been completed and is overdue.

Step 5: Review the information that was completed.

Click on the hyperlink of task title:

Disclose Relatives at UCF	Clifford Danson	10 Mar 2019	Completed
---	-----------------	----------------	-----------

Select the “Open Form” button


Disclose Relatives at UCF x

Completed date: 15 Feb 2019, 2:59pm

Please click “Open” to acknowledge if you have any relatives that currently for work UCF.

For questions or if you need assistance please contact Jamle (DEL) Delegate at pupdown3+11@gmail.com.

Onboarding Form



Review the Information

Relatives Employed at UCF

Please indicate if you have a relative working at UCF.
Yes, I know of a relative employed at UCF

Relative's name
Jessica Rabbit

Department (Type N/A if unknown)
Physics

NOTE:
Relative is anyone related to an employee, including, where applicable, (foster, adopted, step, grand, half, in law, spouse of, or great.) parent, child, sibling, first cousin, spouse, domestic partner, significant other, uncle, aunt, nephew, and/or niece. Persons who intend to marry or with whom the employee intends to form a domestic partnership or other intimate relationship are included in the definition of relative.

Please initial.
CD

Additional Information: I-9 Processing

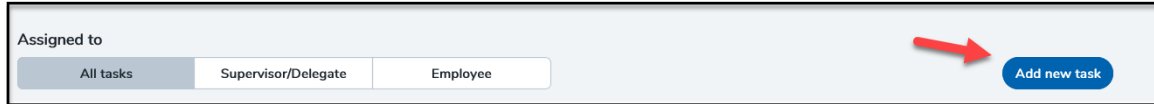
Hiring Departments will continue to complete I-9s within the Electronic I-9 Express system (www.i9express.com). Continue to provide the employee with the instructions to complete Section 1 of the I-9 form so that they select the appropriate location. Once the employee has completed Section 1 of the I-9 form, the employee will need to log back into the Knights Welcome Center and mark the task as completed. Once the hiring department completes Section 2 of the I-9 form within I-9 Express, the onboarding delegate will need to mark the task as completed within PageUp. Hiring department must view the **original documents** to complete Section 2 of the I-9 Form. Section 1 of the I-9 must be complete no later than the employee’s first day of hire. Section 2 of the I-9 form must be completed no later than the employee’s 3rd day of hire.

Step 6: After you have confirmed that the “**Before the First Day**” onboarding tasks have been completed, **submit the Hire ePAF**. For more information about submitting the Hire ePAF, refer to the Submit a Hire ePAF under the Onboarding guides on the PageUp Dashboard.

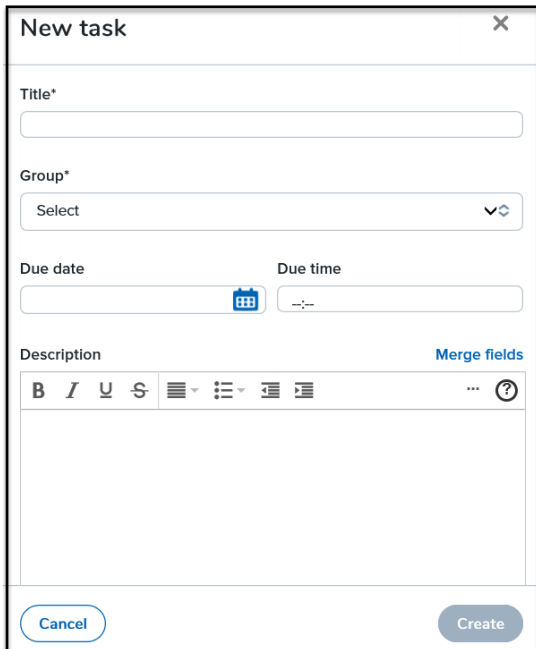
Optional: Additional Functionality

Onboarding Delegates and Supervisors have the ability to create additional tasks that are specific to the division, college, or unit, or new hire's position.

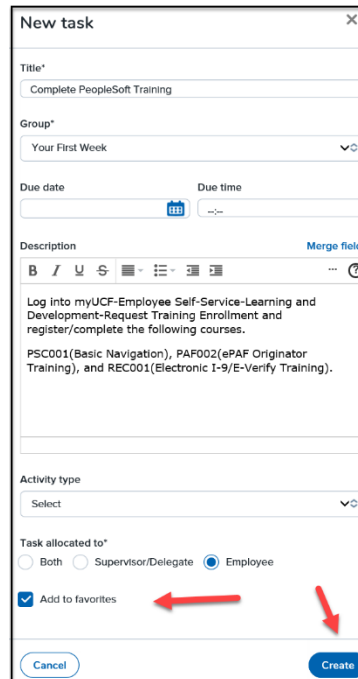
Select "Add new task"



A Blank Task Box will appear

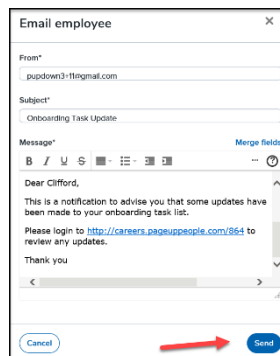
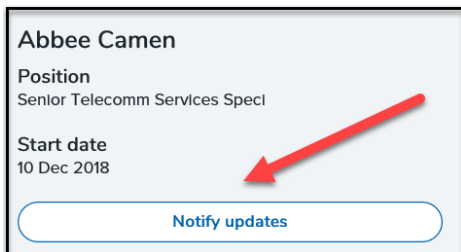


Fill in the Task Information and Select Create.

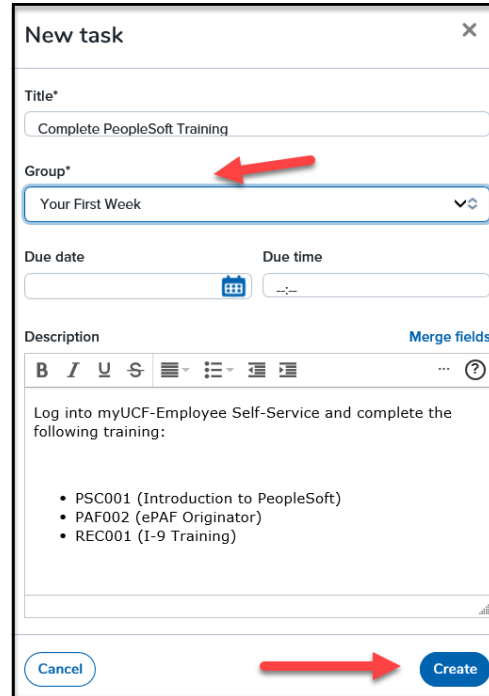
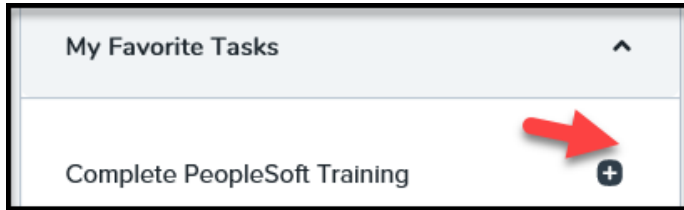


Select Notify Updates

Send an email message to the employee that a new task has been added. You can update the message as needed and select "Send".



Note: If you check the box to add it your favorite, it will be available for you to add to other hires as needed. You can select the (+) sign under “My Favorite Tasks”, Select the “Group” and Select Create to add to the onboarding task for other hires.

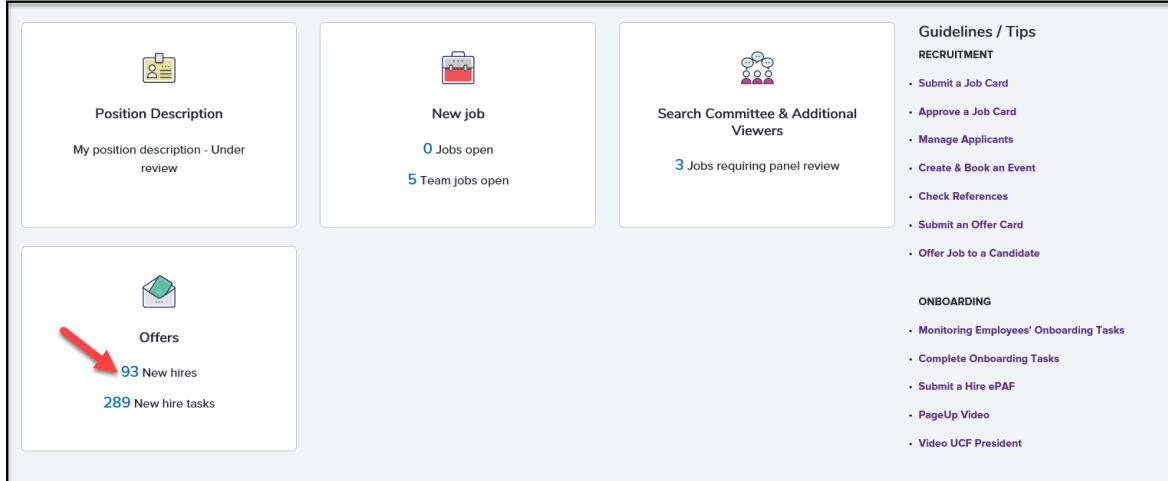


Onboarding Delegate: View Offer/Welcome Letter

Step 1 - Log in to PageUp at <https://ucf.pageuppeople.com>

PAGEUP DASHBOARD

Step 2 – Under Offers, select the number next to New hires.

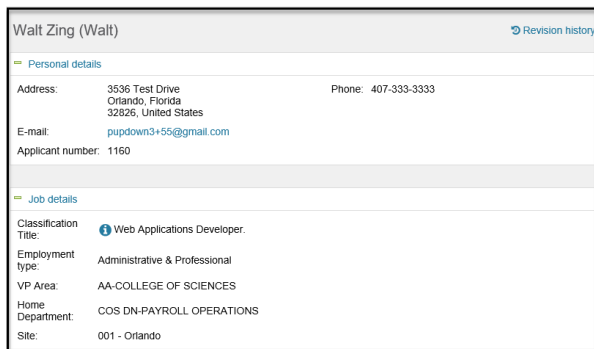


Select Name

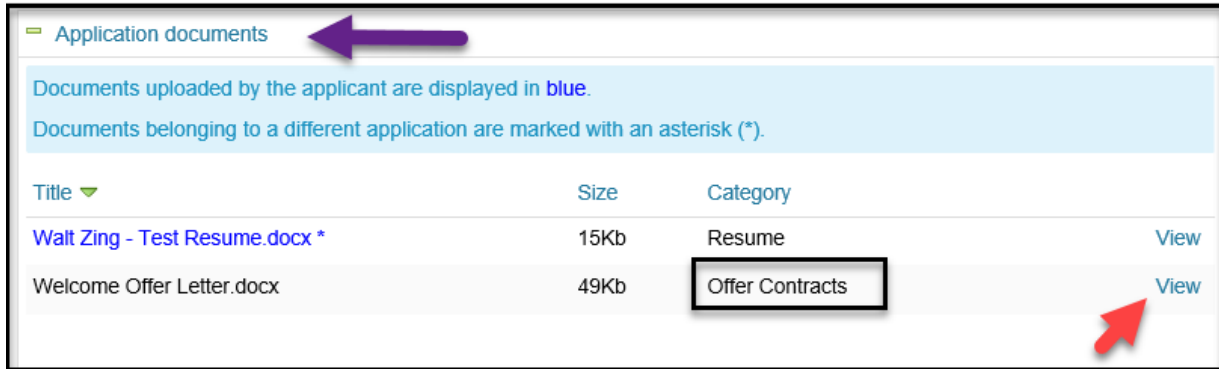
Step 3 – Locate the employees name, and to the far right, select View Offer Details

Applicant first name	Applicant last name	Requisition Number	Title	Application status	
Walt	Zing	492658	Web Applications Developer	Offer Accepted Paperwork Complete (HR USE ONLY)	View offer details View all tasks
Iggy	Zing	492661	Project Manager	Offer Accepted Paperwork Complete (HR USE ONLY)	View offer details View all tasks
Forrest	Woody	492661	Project Manager	Offer Accepted Paperwork Complete (HR USE ONLY)	View offer details View all tasks

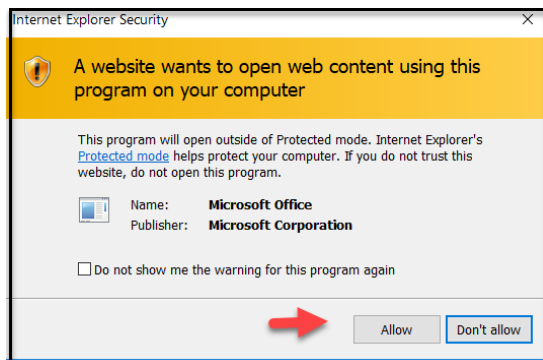
Step 4 –The Offer Card will open.



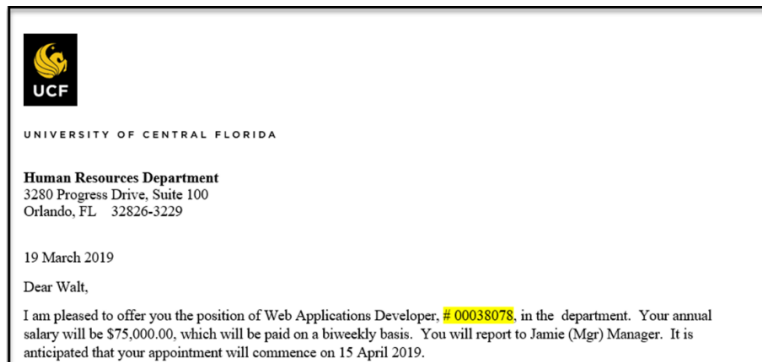
Step 5: Scroll Down towards the bottom of the page to **Application documents** section. Under the Category of “**Offer Contracts**”, to the right select **View** .



Depending on the browser that you are using, the following may appear, select Open and then Allow.



Step 6: You can view the Offer/Welcome Letter.

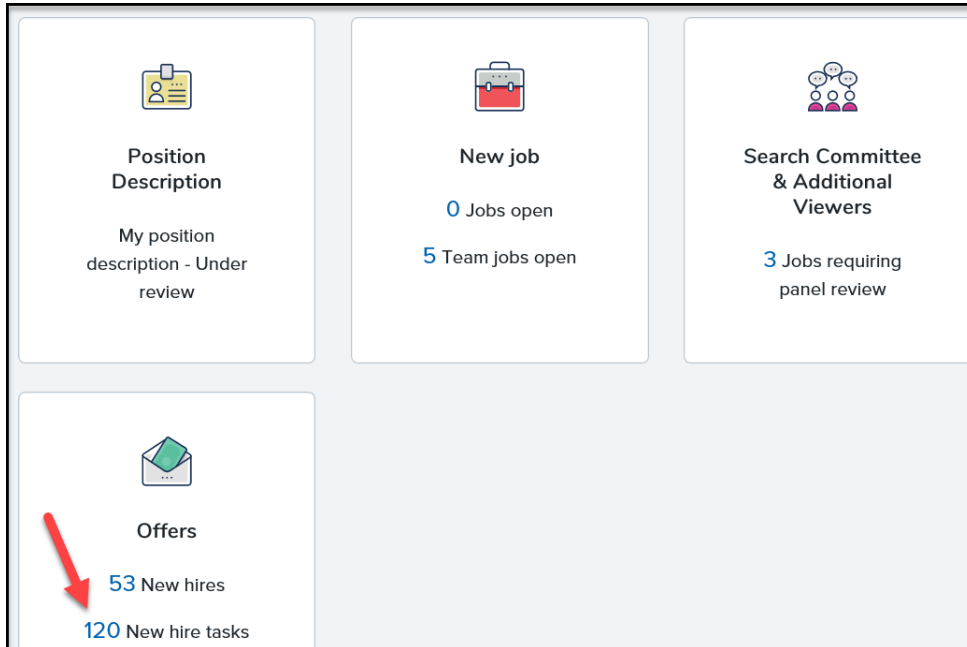


Onboarding Delegate: Reviewing and Completing Tasks

Step 1 - Log in to PageUp at <https://ucf.pageuppeople.com>

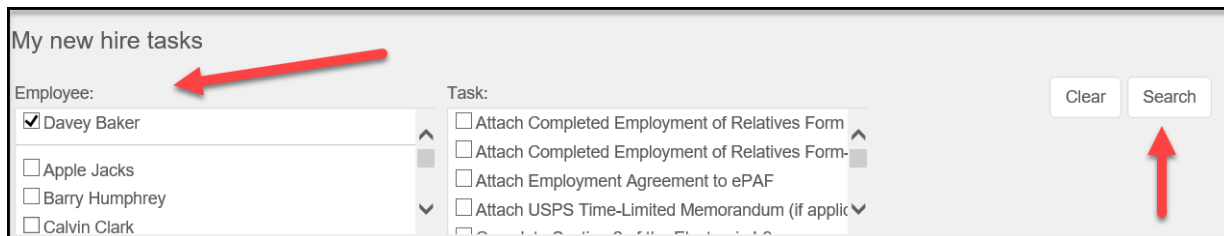
PAGEUP DASHBOARD

Step 2 – Under Offers, select the number next to New hire tasks.



Select Name

Step 3 – Check the box next to the name of the new hire and select Search.



View Department's Onboarding Tasks

Step 4 – Click on the title of each onboarding tasks. **Read the task information.** After the task is completed, mark as completed.

Select	Title	Employee	BadgeID	Step due	Hiring manager
<input type="checkbox"/>	Verify Employee Completed Onboarding Tasks	Davey Baker		1 Feb 2019	Jamie (Mgr) Manager
<input type="checkbox"/>	Submit Hire ePAF	Davey Baker		1 Feb 2019	Jamie (Mgr) Manager
<input type="checkbox"/>	Employment of Relatives Form (if applicable)	Davey Baker		1 Feb 2019	Jamie (Mgr) Manager
<input type="checkbox"/>	Complete Section 2 of the Electronic I-9	Davey Baker		7 Feb 2019	Jamie (Mgr) Manager
<input type="checkbox"/>	Submit Signed Position Description	Davey Baker		11 Feb 2019	Jamie (Mgr) Manager

Verify Employee Completed Onboarding Tasks

Step due: 1 Feb 2019

Review and verify that all the employee onboarding tasks under “Before the First Day” have been completed by the new hire. If the tasks have not been completed, follow-up with the new hire on the completion of the tasks.

Note: Do not submit the Hire ePAF until the “Before the First Day” tasks have been completed by the employee.

Mark as completed
Close

Optional: Bulk Complete

Onboarding Delegates have the option to “Bulk Complete” multiple employees’ onboarding tasks as one time. This feature would be typically used for departments that hire high volume of employees at one time.

Follow Steps 1 and 2 above

Log in to PageUp at <https://ucf.pageuppeople.com>
 Under Offers, select the number next to New hire tasks.

Step 3: Check the box next to the employees' names that you would like to "Bulk Complete" their onboarding tasks at one time. Select Search.

Bulk Complete

My new hire tasks

Employee:

- Apple Jacks
- Walt Zing
- Barry Goodman
- Barrv Humohrev

Task:

- Attach Completed Employment of Relatives Form
- Attach Completed Employment of Relatives Form
- Attach Employment Agreement to ePAF
- Attach USPS Time-Limited Memorandum (if applic

Clear Search

Select	Title	Employee	BadgeID	Step due	Hiring manager
<input type="checkbox"/>	Complete Section 2 of the I9	Apple Jacks		21 Mar 2019	Jamie (COORD) Coordinator
<input type="checkbox"/>	Signed Position Description	Apple Jacks		25 Mar 2019	Jamie (COORD) Coordinator
<input type="checkbox"/>	Mandatory New Employee Training	Apple Jacks		17 Apr 2019	Jamie (COORD) Coordinator
<input type="checkbox"/>	Review & Acknowledge HR Annual Notices	Apple Jacks		25 Mar 2019	Jamie (COORD) Coordinator
<input type="checkbox"/>	Submit Signed Position Description	Walt Zing		4 Apr 2019	Jamie (Mgr) Manager
<input type="checkbox"/>	Verify Employee Completed Onboarding Tasks	Walt Zing		25 Mar 2019	Jamie (Mgr) Manager
<input type="checkbox"/>	Submit Hire ePAF	Walt Zing		25 Mar 2019	Jamie (Mgr) Manager
<input type="checkbox"/>	Employment of Relatives Form (if applicable)	Walt Zing		25 Mar 2019	Jamie (Mgr) Manager
<input type="checkbox"/>	Complete Mandatory UCF Webcourses	Walt Zing		4 Apr 2019	Jamie (Mgr) Manager

Or if you would like to Bulk Complete a specific task, Check the Box under Task. Select Search

Bulk Complete

My new hire tasks

Employee:

- Barry Goodman
- Barry Humphrey
- Calvin Clark
- Carl Bench

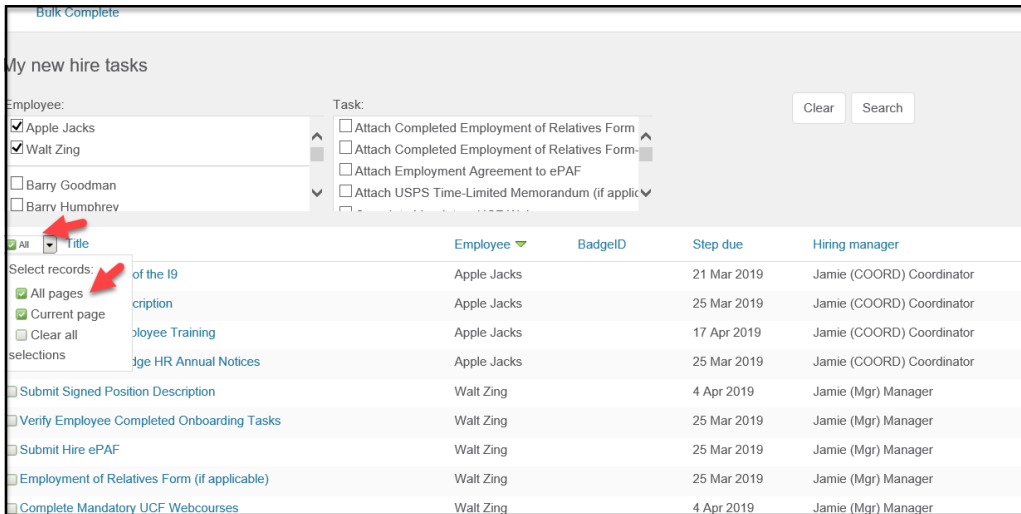
Task:

- Attach Employment Agreement to ePAF
- Attach Completed Employment of Relatives Form
- Attach Completed Employment of Relatives Form
- Attach USPS Time-Limited Memorandum (if applic

Clear Search

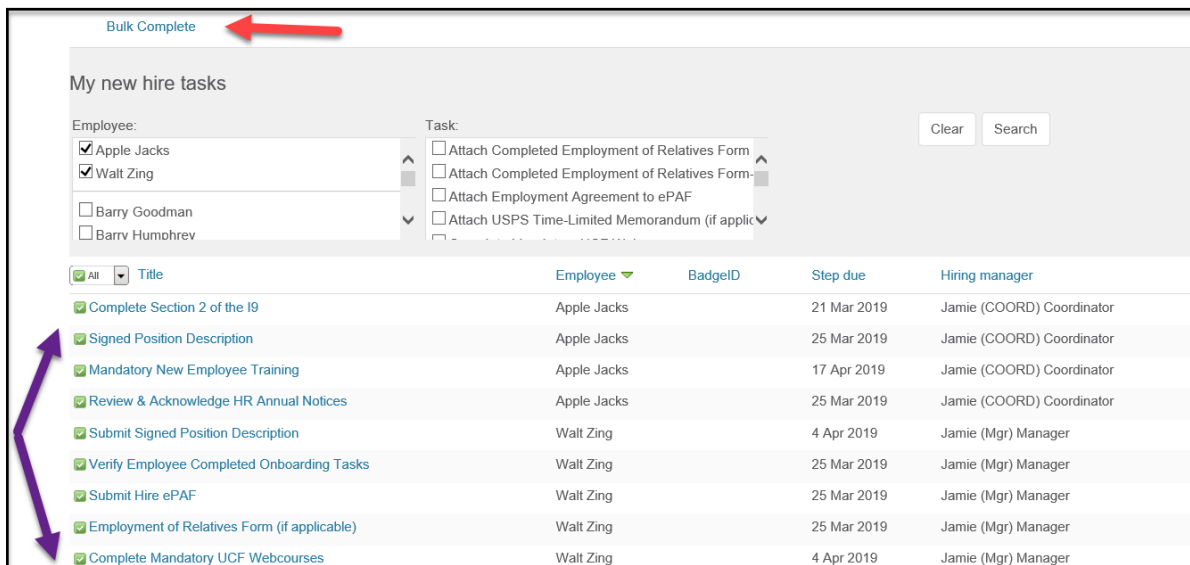
Select	Title	Employee	BadgeID	Step due	Hiring manager
<input type="checkbox"/>	Attach Employment Agreement to ePAF	Colleen Baker		25 Mar 2019	Jamie (Mgr) Manager
<input type="checkbox"/>	Attach Employment Agreement to ePAF	Freddy Burger		29 Mar 2019	Jamie (Mgr) Manager
<input type="checkbox"/>	Attach Employment Agreement to ePAF	Lauren Carpenter		25 Mar 2019	Jamie (Mgr) Manager
<input type="checkbox"/>	Attach Employment Agreement to ePAF	Edward Charles		5 Apr 2019	Jamie (Mgr) Manager
<input type="checkbox"/>	Attach Employment Agreement to ePAF	Barry Goodman	3026596	25 Mar 2019	Jamie (Mgr) Manager
<input type="checkbox"/>	Attach Employment Agreement to ePAF	Paul Jasner		25 Mar 2019	Jamie (Mgr) Manager
<input type="checkbox"/>	Attach Employment Agreement to ePAF	Marissa Lee		5 Apr 2019	Jamie (Mgr) Manager
<input type="checkbox"/>	Attach Employment Agreement to ePAF	Franks Lott	478989	5 Apr 2019	Jamie (Mgr) Manager
<input type="checkbox"/>	Attach Employment Agreement to ePAF	Kurt Mendelfield		5 Apr 2019	Jamie (Mgr) Manager

Step 3: Under the drop down above the Onboarding Tasks, Check the box “All Pages”

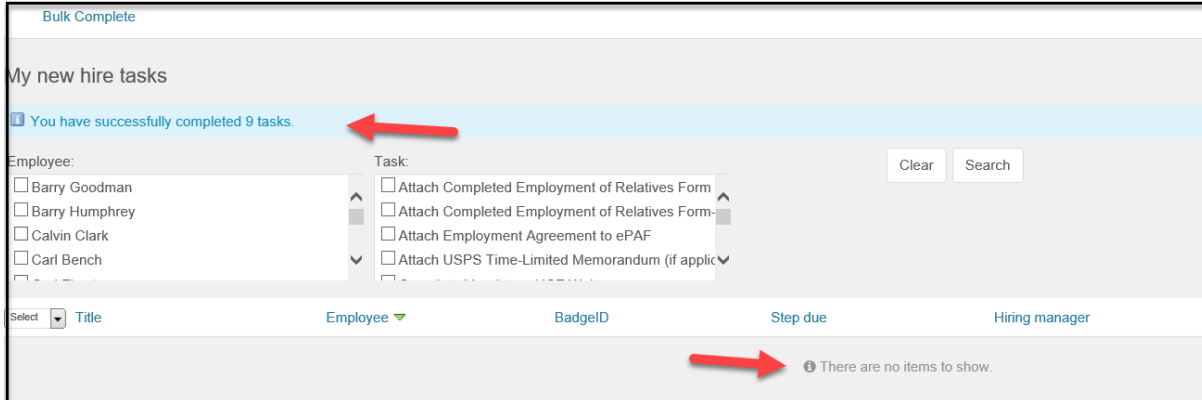


Step 4: You will notice that all the boxes are now in green with a check box next to them. You can “uncheck” any that you do not want to Bulk Complete. Select Bulk Complete at the top of the page.

Important: Once you select Bulk Complete the tasks will no longer appear under your “new hire tasks”. Verify that you have read the information for each associated task and the tasks have been completed before selecting Bulk Complete.



Step 5: The tasks have been marked complete and no longer appear.

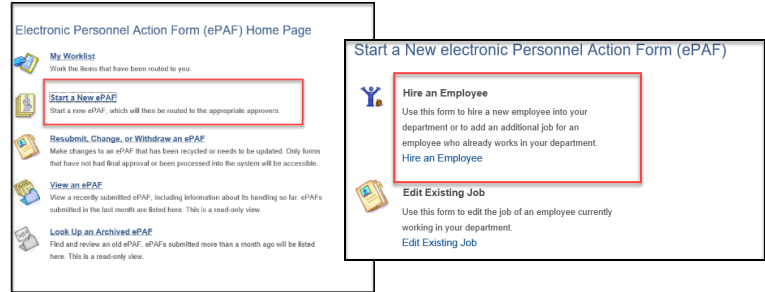


The screenshot shows a web interface titled "My new hire tasks". At the top, there is a blue banner that says "Bulk Complete" and "You have successfully completed 9 tasks." with a red arrow pointing to it. Below this, there are two columns of checkboxes for "Employee:" and "Task:". The "Employee:" column lists Barry Goodman, Barry Humphrey, Calvin Clark, and Carl Bench. The "Task:" column lists "Attach Completed Employment of Relatives Form" and "Attach USPS Time-Limited Memorandum (if applic...". There are "Clear" and "Search" buttons to the right. Below the lists is a table header with columns: "Select", "Title", "Employee", "BadgeID", "Step due", and "Hiring manager". At the bottom of the table area, there is a message "There are no items to show." with a red arrow pointing to it.

Submitting Hire ePAF

Step 1 - Log in to myUCF (Human Capital Management) and navigate to:

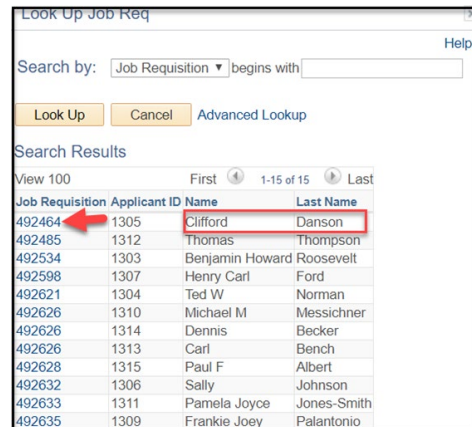
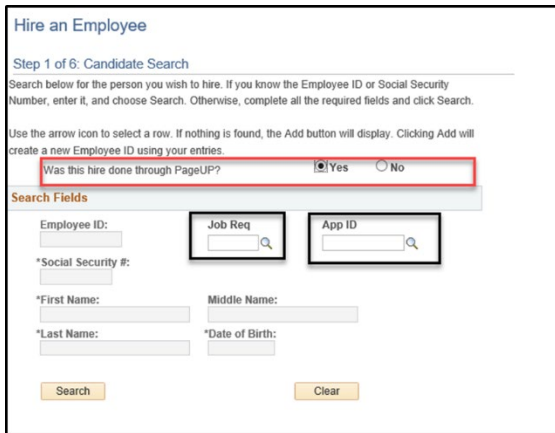
- Department Self-Service
- ePAF Homepage-Start a New ePAF
- Hire an employee



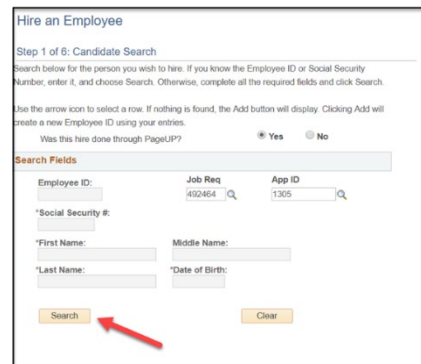
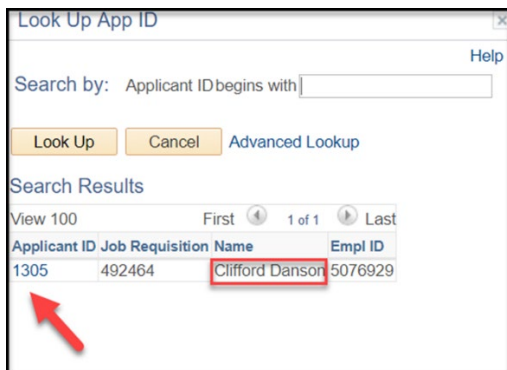
Hire Processed Through Pageup

Step 2 –

- Select “Yes” if the hire was done through Pageup.
- Click the magnifying glass icon and lookup the Job Req ID. You can sort by name.
- Select the requisition number in blue to the far left of the employee’s name.



- Click the magnifying glass icon and lookup the App (Applicant) ID
- Select the applicant ID number in blue to the far left of the employee’s name.
- Select Search



Select Appropriate Record

Step 3 –

Applicant and Person Results

- If there is a **match** under **person results**, Select the yellow arrow.
- Go to Step 4.

Hire an Employee

Step 1 of 6: Candidate Search

Search below for the person you wish to hire. If you know the Employee ID or Social Security Number, enter it, and choose Search. Otherwise, complete all the required fields and click Search.

Use the arrow icon to select a row. If nothing is found, the Add button will display. Clicking Add will create a new Employee ID using your entries.

Was this hire done through PageUP? Yes No

Search Fields

Employee ID: Job Req: 492216 App ID: 1001

*Social Security #:

*First Name: Mary Middle Name:

*Last Name: Maples *Date of Birth: 10/01/1971

Search Clear

Applicants

	App ID	Job Req	Name	Date of Birth	National ID	Empl ID
1	1001	492216	Mary Maples	10/01/1971	(Not Displayed)	5027221

Person Results

	HR	Job	Act	EmplID	Rcd#	Name	Date of Birth	National ID
1	→	✓	✓	0314898	0	Mary Maples	12/24/1960	(Not Displayed)
2	→	✓	✓	5027221	0	Mary Maples	10/01/1971	MATCH

IMPORTANT Look under Person Results, if there is a match select the yellow arrow for that record. Only select the white arrow under Applicants if there is no Match under Person Results. Selecting the white arrow under Applicants will create a new UCF ID number.

OR

Step 3-

- If there is **no match** under Person Results, Select the White Arrow under Applicants.

Hire an Employee

Step 1 of 6: Candidate Search

Search below for the person you wish to hire. If you know the Employee ID or Social Security Number, enter it, and choose Search. Otherwise, complete all the required fields and click Search.

Use the arrow icon to select a row. If nothing is found, the Add button will display. Clicking Add will create a new Employee ID using your entries.

Was this hire done through PageUP? Yes No

Search Fields

Employee ID: Job Req: 492217 App ID: 1017

*Social Security #:

*First Name: Topanga Middle Name:

*Last Name: Lawrence *Date of Birth: 03/01/1950

Search Clear

Applicants

	App ID	Job Req	Name	Date of Birth	National ID	Empl ID
1	1017	492217	Topanga Lawrence	03/01/1950	(Not Displayed)	

In this example, as there was not a "Match" under Person Results, click on the white arrow under Applicants.

Please note by selecting the white arrow, a new UCF ID number (Emplid) and NID will be created once the information is submitted. **Please be careful when making your selection as we do not want to create duplicates IDs.**

- You will receive a message to enter the Social Security Number. Select Ok.

Message

Make an entry in the following required field(s) to proceed: Social Security # (20002,205)

Fields marked with an asterisk are required. Make an entry in each of these fields before proceeding.

OK

- Enter the Social Security Number and select the **white arrow** again.

If you receive the following warning message, Entered National ID/SSN matches an existing Individual at UCF, **Stop, do not proceed with the ePAF and contact HR-Records.**

Biographical Information

The data from Pageup will populate the fields.

Step 4 –

- Click on Update with PageUp Data button. (if it appears)
- Verify the name and Social Security Number on the ePAF matches the information on the I-9.
- Check the Enterprise Email box if an UCF email is needed.
- Select Save & Stop (to create emplid or NID ONLY) or Save & Next to proceed with the job information.

Review the Job and Position Information

The data from PageUp will populate many of the ePAF fields.

Step 5:

- Verify the information is correct.
 - Effective Date
 - Employee Group
 - Employee Class
 - Position Information

Personal Info

Name: Danson, Clifford Empl ID: 5076929

Cit Status: Naturalized Personal Data
Job Data
Additional Pay

Email Address: Pupdown3+168@gmail.com

Hire Form Data

Effective Date: 03/11/2019 eForm ID: 659050

Position Non-Position

*Employee Group: Exempt A&P

*Pay Group: A&P Executive Service

*Empl Class: Fac/A&P Regular

The information will auto populate from the offer card. Verify the information is correct.

[<< Search](#) [Next >>](#)

eForm ID: 659050

Position As Of: 02/22/2019

*Position Number: 00032003 Associate General Counsel

*Job Code: LG0118

*Position Title: Associate General Counsel *Short Title: Associate

*Department: 01812001 VP GEN CN-PAYROLL

*Location Code: MAIN UCF MAIN CAMPUS

*Regular/Temporary: Regular

*Reports To: 00037813

*Authorized FTE: 1.000000

*Liability Dept: 01812001 VP GEN CN-PAYROLL

*Admin Code: Y2 Associate General Counsel

Salary Admin Plan: 24 Grade 24

The information will auto populate from the offer card. Verify the information is correct.

[<< Previous](#) [Next >>](#)

- Verify the salary and standard hours is correct.
- Input the funding account number(s) and percentage.

Hire Form Data eForm ID: 659050

The standard hours and salary will automatically populate from the offer card. Verify the information is correct.

Bi-weekly Rate: \$1119.460000 Annual Rate: \$29217.800

*Standard Hours: 40.00

Pay Component		Comp Rate Code	Compensation Rate	
1	NAANNL		29217.800000	+

Input the funding account number(s), mark one as primary, input the percentages(s). Select the (+) if you need to add accounts. Percentages must equal 100%.

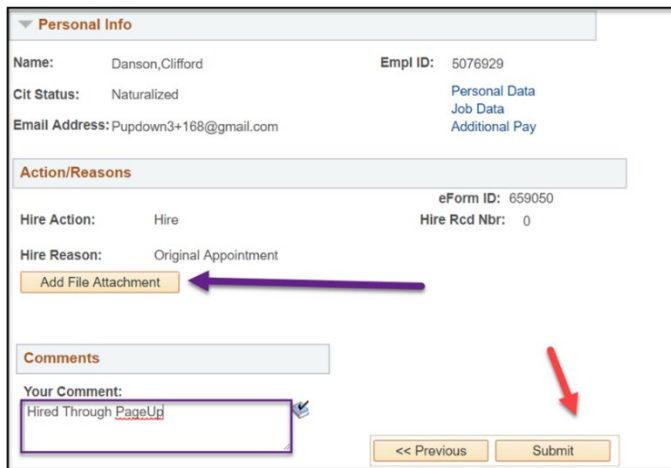
Job Distribution		Funding Department	Description	Primary	Earnings Code	*Percent of Distribution	Compensation Rate	
1				<input type="checkbox"/>	REG	0.000	0.000000	+ -

[<< Previous](#) [Next >>](#)

Submit Hire ePAF

Step 6:

- Attach appropriate documents via selecting Add File Attachment
 - Employment Agreements (when applicable)
 - Fully Executed and Signed Employment of Relatives Form (when applicable)
 - USPS Time Limited Memorandum (when applicable)
- In the comments, indicate “Hired through PageUp.”
- Select Submit
- A message will appear, “Submit this form?”
Select “Yes”



Personal Info

Name: Danson, Clifford Empl ID: 5076929

Cit Status: Naturalized Personal Data
Job Data

Email Address: Pupdown3+168@gmail.com Additional Pay

Action/Reasons

Hire Action: Hire eForm ID: 659050
Hire Rcd Nbr: 0

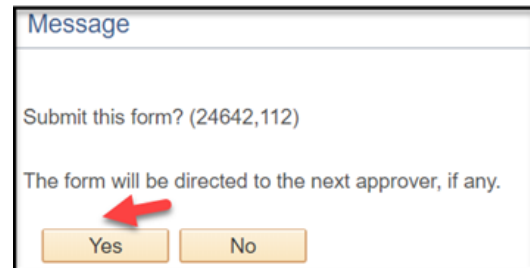
Hire Reason: Original Appointment

[Add File Attachment](#) ←

Comments

Your Comment:
Hired Through [PageUp](#)

<< Previous Submit



Message

Submit this form? (24642, 112)

The form will be directed to the next approver, if any.