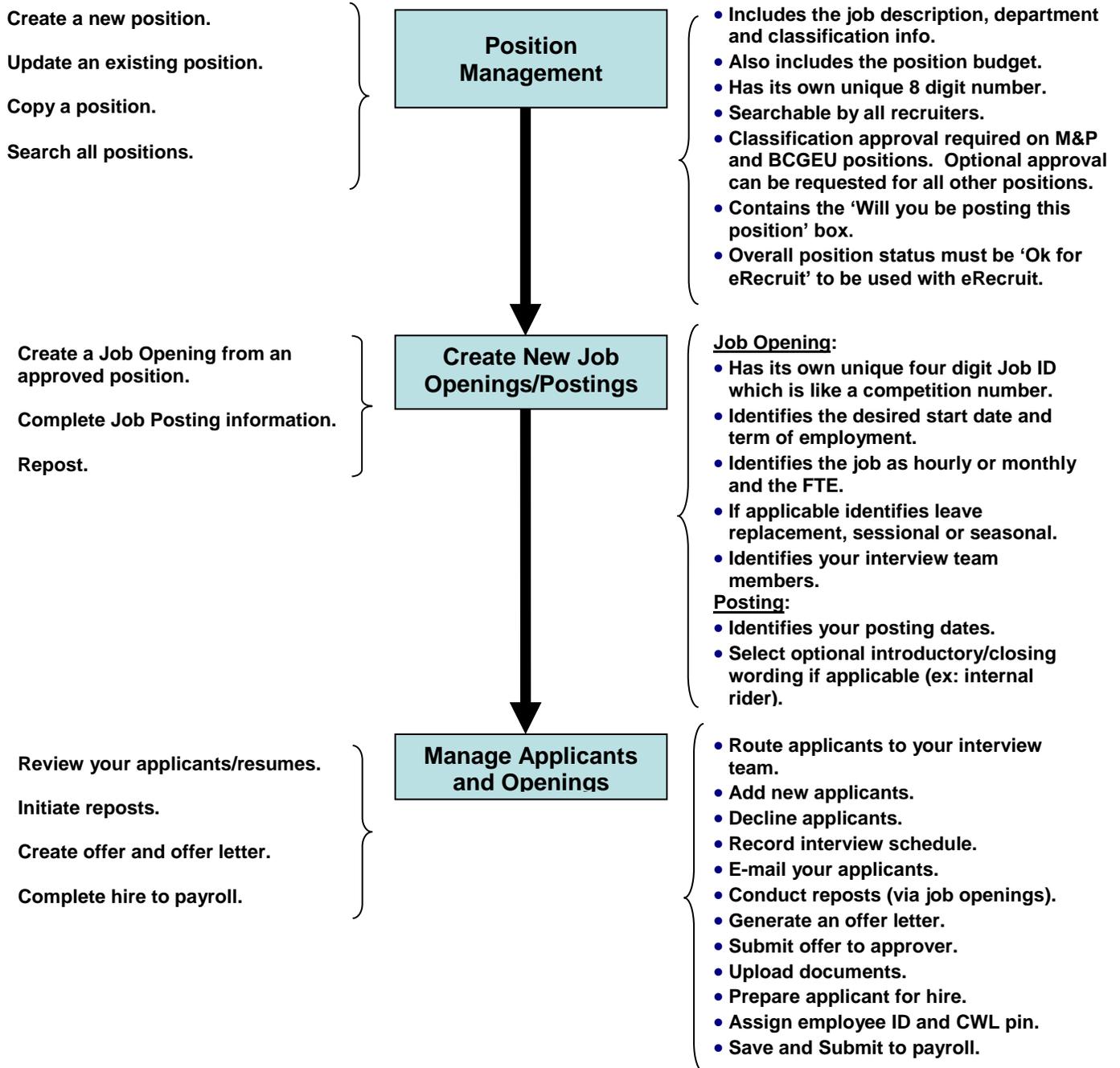


# Staff eRecruit

## QUICK REFERENCE GUIDE

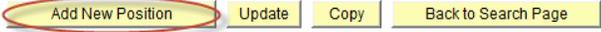
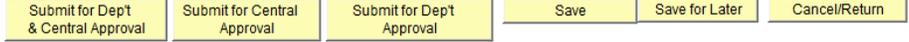
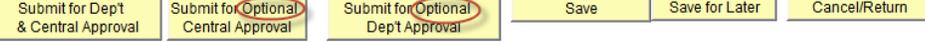
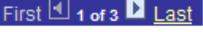


The complete eRecruit manual can be found at:

<http://www.hr.ubc.ca/media/UBC-Staff-eRecruit-Training-Manual-May-2014.pdf>

# Quick Steps

(Section column refers to section in Staff eRecruit Training manual)

Steps	Module	Section
<b>Position Management</b>		
<ul style="list-style-type: none"> <li>If your position already exists and you want to update it, go to step 2.</li> <li>If your position already exists, doesn't require any changes, is approved for eRecruit and you want to create a job opening so you can post it, go to step 4.</li> <li>If you've recently posted a job and want to re-post it (within 90 days), go to step 5.</li> </ul>		
<b>Step 1: New Position</b>		
<ul style="list-style-type: none"> <li>If you find an existing position that's close to what you need (your own or another department's), you can copy it. Go to step 3.</li> </ul>	Position Management	2.5
<ul style="list-style-type: none"> <li>To create a new position, click on 'Add New Position' from the search results page. Complete all the tabs.</li> </ul> 	Position Management	2.2
<ul style="list-style-type: none"> <li>Each position is given a unique number.</li> </ul>	Position Management	2.2
<ul style="list-style-type: none"> <li>You usually create a position just once for your organization. If the position becomes vacant, then you can go directly to step 4 (unless the job description or classification needs tweaking, then you update the position first via step 2).</li> </ul>	Position Management	2.2
<ul style="list-style-type: none"> <li>The position defines the classification, department, reporting hierarchy, job description and budget. It also keeps a history of changes to the position.</li> </ul>	Position Management	2.2
<ul style="list-style-type: none"> <li>If you are posting the position on the UBC web site ensure that the posting box is checked. Will you be posting this position? <input checked="" type="checkbox"/></li> </ul>		2.2
<ul style="list-style-type: none"> <li>Department approvals are required for all new positions.</li> <li>Central approvals are required for M&amp;P and BCGEU-OK positions only.</li> <li>You can submit these approvals independently (see buttons below), or together (by clicking on the 'Submit for Dept &amp; Central Approval' button).</li> <li>The 'Save for Later' button saves a draft version of your position. You can return later and finish your data-entry.</li> <li>The 'Save' button is only used when updating positions where no fields were changed that require a position to be re-approved.</li> <li>The 'Cancel/Return' button takes you back to the position search list.</li> </ul> 	Position Management	2.3
<ul style="list-style-type: none"> <li>If your position does not require approval (dept or central), the word 'Optional' is inserted into the button name. You can use these buttons to optionally send positions for approval.</li> </ul> 	Position Management	2.3
<ul style="list-style-type: none"> <li>When approvals are submitted, the initiator is taken to the 'Review and confirm Approvers' page where they can check their Approvers before Workflow is launched.</li> <li>Make corrections is necessary.</li> </ul>	Position Management	2.3
<b>Step 2: Update An Existing Position</b>		
<ul style="list-style-type: none"> <li>Do this step if:               <ol style="list-style-type: none"> <li>You need to update an existing position (job description, budget, etc.).</li> <li>It has been pushed back for correction by an approver.</li> </ol> </li> </ul>	Position Management	2.4
<ul style="list-style-type: none"> <li>Unless your position is in 'Draft' status, your position will not be updateable.</li> <li>If it's not updateable, click the + (plus) sign near the upper right corner of the screen.</li> </ul>  <ul style="list-style-type: none"> <li>This creates a new version of your position with its own event date. This feature allows you to record a history of changes so you can see how the position evolved over time. All dated changes retain the same position number.</li> </ul>  <ul style="list-style-type: none"> <li>You can have multiple versions of your position with the same event date. If this happens, the system will increment the sequence number automatically. This will let you and the system know which record is the most recent when the dates are the same.</li> </ul> <p>* Sequence: <input type="text" value="0"/> The 0 will change to a 1 on the latter version of the same event date.</p>	Position Management	2.4
<ul style="list-style-type: none"> <li>Make changes/corrections is necessary.</li> </ul>	Position Management	2.4

<ul style="list-style-type: none"> <li>Department re-approvals are required as follows: change the job code, term to ongoing, inactive to active, extend the term, new speedcharts, budget changes over 10%.</li> <li>Central re-approvals are required if you change the job code and/or job description for M&amp;P and BCGEU-OK positions only.</li> <li>You can submit these approvals independently (see buttons below), or together (by clicking on the 'Submit for Dept &amp; Central Approval' button).</li> <li>The 'Save for Later' button saves a draft version of your position. You can return later and finish your data-entry.</li> <li>The 'Save' button is only used when updating positions where no fields were changed that require a position to be re-approved.</li> <li>The 'Cancel/Return' button takes you back to the position search list.</li> </ul> 	Position Management	2.3
<ul style="list-style-type: none"> <li>If your position does not require approval (dept or central), the word 'Optional' is inserted into the button name. You can use these buttons to optionally send positions for approval.</li> </ul> 	Position Management	2.3
<ul style="list-style-type: none"> <li>When approvals are submitted, the initiator is taken to the 'Review and confirm Approvers' page where they can check their Approvers before Workflow is launched.</li> <li>Make corrections as necessary.</li> </ul>	Position Management	2.3
<h3>Step 3: Copy a Job Description</h3>		
<ul style="list-style-type: none"> <li>Search for a position that's similar/identical to what you need.</li> <li>From the search list, click the check box next to the position number and then click the 'Copy' button.</li> </ul>  <ul style="list-style-type: none"> <li>From this point forward, instructions are the same as step 2 – Updating an Existing Position.</li> <li>Please ensure to update and edit all department information, review contents of the job description to make sure it suits the needs of your unit, and add a position budget.</li> </ul>	Position Management	2.5
<h3>Step 4: New Job Openings/Postings</h3>		
<ul style="list-style-type: none"> <li>If your job opening and initial posting already exists and you are just doing a re-post, go to step 5.</li> </ul>	New Job Openings/Postings	
<ul style="list-style-type: none"> <li>You create a Job Opening from an existing, approved position. Each Job Opening is given a unique Job ID number (like a Competition Number).</li> </ul>	New Job Openings/Postings	3.1
<ul style="list-style-type: none"> <li>You are required to enter: available openings, recruiting location, desired start date, whether it is term or ongoing, hourly or monthly paid, and the FTE.</li> <li>You can optionally enter: employees being replaced, possibility of extension, leave replacement, seasonal or seasonal. You can also start to assemble your interview team.</li> </ul> <p><b>Interviewers (must be a UBC employee)</b></p>	New Job Openings/Postings	3.1
<ul style="list-style-type: none"> <li>You add the initial posting to the job opening page.</li> </ul> 	New Job Openings/Postings	3.1
<ul style="list-style-type: none"> <li>The eRecruit system assists you by defaulting in the posting start and end dates. You can change these within the constraints of our collective agreements. Only CUPE 116 jobs are restricted to the Monday to Friday posting period.</li> </ul>	New Job Openings/Postings	3.1
<ul style="list-style-type: none"> <li>You can add an Internal Rider statement and other types of opening and closing wording by selecting them from the pull down menu in the job opening details/posting information page. Internal riders are for non-union positions and must be for current UBC employees.</li> <li>An equity/immigration statement is automatically added.</li> </ul>	New Job Openings/Postings	3.1
<ul style="list-style-type: none"> <li>When your opening/positing is complete, submit it for department approval.</li> <li>Step 1: Click on the 'Review and Confirm Approvers' button.</li> </ul>  <ul style="list-style-type: none"> <li>The initiator is taken to the 'Review and confirm Approvers' page where they can check their Approvers before Workflow is launched.</li> <li>Corrections may be necessary.</li> <li>Return to the opening posting page. If approver corrections are required, click on 'Save for Later', fix your approver issues, return and start the approval process again.</li> <li>Step 2: If your approvers are ok, click on the 'Save &amp; Submit' button.</li> </ul>  <ul style="list-style-type: none"> <li>Your approvers can either approve your job opening/posting or push it back for changes.</li> </ul>	New Job Openings/Postings	3.2

<ul style="list-style-type: none"> <li>For job openings, it is allowable for an approver to also be the initiator.</li> </ul>		
<b>Step 5: Re-post</b>		
<ul style="list-style-type: none"> <li>Access an existing Job Opening from the 'Manage Applicants and Openings' menu by entering in the position number or by using the search criteria fields.</li> </ul>	Manage Applicants and Openings	3.3
<ul style="list-style-type: none"> <li>Once your Job Opening is on the screen, click on the hyperlink: 'Job Opening Details'. <a href="#">Job Opening Details</a></li> <li>You can do re-posts and update your interview team list.</li> <li>You add the re-post to the job opening the same way you added the original posting (see step 4).</li> <li><a href="#">+ Create New Job Posting/Repost</a></li> <li>Hit the 'save' hyperlink.  <a href="#">Save</a></li> <li>Reposts do not require re-approval so once saved it will be posted when specified.</li> </ul>	Manage Applicants and Openings	3.3
<b>Step 6: Manage Applicants</b>		
<ul style="list-style-type: none"> <li>Access an existing Job Opening from the 'Manage Applicants and Openings' menu by entering in the Job ID number or by using the search criteria fields.</li> <li>Once here, you can view your Job Opening.</li> <li>Before you can take action for unionized positions, HR will prioritize the Job Opening after the posting closes</li> </ul>	Manage Applicants and Openings	5.1
<ul style="list-style-type: none"> <li><b>TIP:</b> you won't receive an email notification once your Job Opening closes so you will need to keep track of the positions you posted and the closing dates of the postings.</li> </ul>		5.1
<ul style="list-style-type: none"> <li>Use the 'Job Opening Details' hyperlink to do re-posts and update your interview team. <a href="#">Job Opening Details</a> <ol style="list-style-type: none"> <li>See Step 5 for details on reposting.</li> <li>To update your interview team, click on the 'Add Interviewers' hyperlink on the job opening screen. <a href="#">+ Add Interviewers</a></li> <li>Once added, click on the save button  <a href="#">Save</a> on the bottom of the screen.</li> <li>To remove interviewers, click on the trash bin symbol  to the right of 'Interviewer ID'.</li> </ol> </li> </ul>	Manage Applicants and Openings	5.1  3.1
<ul style="list-style-type: none"> <li>Use the 'Add New Applicant' hyperlink <a href="#">Add New Applicant</a> to add paper applications, applications received via email, and internal rider applicants if applicable.</li> </ul>	Manage Applicants and Openings	5.2
<ul style="list-style-type: none"> <li><b>TIP:</b> if you would like perform a group action for all applicants, use the check boxes in the left column, or click on the 'Select All' or 'Deselect All' hyperlink <a href="#">Select All</a> <a href="#">Deselect All</a></li> <li>Then click on the 'Group Action' drop down menu Group Action: <input type="text" value=""/> to see the group action options.</li> </ul>		5.1
<ul style="list-style-type: none"> <li>Use the 'Select Action' drop down menu <input type="text" value="*Select Action..."/> under the 'Take Action' column to perform an action on a single applicant. Select one of the following actions: <ol style="list-style-type: none"> <li>Route Short List Applicant (Optional) – to short-list applicants/resumes to interview team. Once applicants/resumes have been short-listed, interviewers will receive an email indicating applicants/resumes are ready for review in their CWL self-service portal.</li> <li>Please note that applicants/resumes are not automatically short-listed once the posting closes. You must manually route them to your interview team</li> <li>Decline Applicant (Optional) – to decline the unsuccessful applicant(s). <ul style="list-style-type: none"> <li>Please contact HR regarding CUPE 2950 placement/recall applicants prior to declining them.</li> <li>The system will automatically decline applicants once someone is hired into the position.</li> </ul> </li> <li>Manage Interviews (Optional) – to schedule interviews for applicants. <ul style="list-style-type: none"> <li>If your Job Opening has CUPE 2950 recall candidates, interview times need to be entered in order to move forward.</li> </ul> </li> <li>Prepare Job Offer (Mandatory) – prepare job offer for successful applicant. <ul style="list-style-type: none"> <li>This includes generating the offer letter and submitting the job offer to the Approvers for approval.</li> <li>Once you receive the offer letter in your inbox, please format the offer letter on your department letterhead and have the designated person in your department sign the offer letter. Upload the offer letter on department letterhead into the system as 'Modified Offer Letter' (009) – see '6. Pre-Hire Documents' for instructions.</li> </ul> </li> </ol> </li> </ul>		5.4 – 5.12

<ul style="list-style-type: none"> <li>Once you receive a confirmation email that your Approver has approved the job offer, you can then move to '7. Prepare For Hire' to complete the hire.</li> </ul> <p>6. Pre-Hire Checklist (Optional) – a list of documents that are typically needed when hiring an applicant.</p> <p>7. Pre-Hire Documents (Mandatory) – this is where you upload offer letters (modified offer letters on department letterhead, signed M&amp;P offer letters), SIN cards, and if applicable foreign hire documents.</p> <p>8. Prepare For Hire (Mandatory) – final step in hiring an applicant after the job offer is approved.</p> <ul style="list-style-type: none"> <li>Here you would select the type of appointment, assign an early employee ID, and receive the employee's CWL pin number.</li> <li>Once you've completed the information, 'Save and Submit' the offer to prepare the employee for hire. Once this is done, Payroll can then transfer the information into HRMS and payroll.</li> <li>This step replaces the paper Staff Appointment form so do not send a copy to HR or Payroll.</li> </ul> <p>Email Applicant (Optional) – contact the applicant via e-mail. Each applicant will receive an individual email although it will appear as though everyone is cc'd on the same group email.</p>		
<b>Step 7: Make an Offer or Adjust an Existing Offer</b>		
<b>Make an offer:</b>		
<ul style="list-style-type: none"> <li>Access an existing Job Opening from the 'Manage Applicants and Openings' menu by entering in the Job ID number or searching the fields.</li> </ul>	Manage Applicants and Openings	5.11
<ul style="list-style-type: none"> <li>If you are preparing the offer for the first time, select take action '4. Prepare Job Offer' from take action drop down menu.</li> </ul>	Manage Applicants and Openings	5.11
<b>Steps</b>	<b>Module</b>	<b>Section</b>
<ul style="list-style-type: none"> <li>If you are correcting/editing an existing offer, go to the 'Adjust an existing offer' section below.</li> </ul>	Manage Applicants and Openings	
<ul style="list-style-type: none"> <li>Everything entered on the Offer page affects the offer letter that is generated and the electronic appointment that goes to Payroll.</li> <li>On the Offer page, check/change the appointment dates, enter the offer amount (check hourly vs. monthly and FTE), identify citizenship status, and enter the earnings and speed chart information. If the offer is an extension of the current appointment, check the extension button. <ul style="list-style-type: none"> <li>Is this job offer an extension of a current term position? <input type="checkbox"/></li> </ul> </li> <li>Click the 'Generate Offer Letter' hyperlink <a href="#">Generate Offer Letter</a>. The offer letter will be sent to your inbox as a Word document in an email. Format the offer letter on your department letterhead and have the designated person in your department sign the offer letter.</li> </ul>	Manage Applicants and Openings	5.11
<ul style="list-style-type: none"> <li>If your offer is incomplete and you want to return later to finish it, click on the 'Save for Later' button. If you elect to 'Save for Later' your offer will be in draft form and will not be sent to for approval.</li> </ul>	Manage Applicants and Openings	5.11
<ul style="list-style-type: none"> <li>When your job offer is complete, submit it for approval as per below:</li> <li>For approvals, the first step is to click on the 'Review and Confirm Approvers' button. <ul style="list-style-type: none"> <li><a href="#">Review and Confirm Approvers</a></li> </ul> </li> <li>The initiator is taken to the 'Review and confirm Approvers' page where they can check their Approvers before Workflow is launched.</li> <li>Corrections may be necessary.</li> <li>Return to the job offer page. If approver corrections are required, click on 'Save for Later', fix your approver issues, return and start the approval process again.</li> <li>If your approvers are ok, click on the 'Save &amp; Submit' button. <ul style="list-style-type: none"> <li><a href="#">Save &amp; Submit</a> <a href="#">Save as Draft</a> <a href="#">Cancel</a></li> </ul> </li> <li>Your approvers can either approve your job offer or push it back for changes.</li> <li>For job offers, it is not allowable for an approver to also be the initiator.</li> </ul>	Manage Applicants and Openings	5.13
<b>Adjust an existing offer:</b>		
<ul style="list-style-type: none"> <li>If you need to re-access your offer to either complete it or make corrections on a push-back from your Approver: <ol style="list-style-type: none"> <li>Locate your applicant in 'Manage Applicants'.</li> <li>Look in the Disposition column and find the disposition of your offer'. It might say 'Draft Offer' or 'Offer Pending'. Click on this hyperlink. <ul style="list-style-type: none"> <li><a href="#">OfferPendg</a> <a href="#">DraftOffer</a></li> </ul> </li> </ol> </li> </ul>	Manage Applicants and Openings	5.11

<p>c. Scroll to the bottom of the offer screen and locate the 'Edit Offer' hyperlink. Click this before you start making corrections.</p> <p style="text-align: center;"><span>Edit Offer</span></p> <p>d. Make changes/edits and generate the offer letter.</p> <p>e. Once you receive your offer letter, proofread it for accuracy. Upload the modified offer letter in '6. Pre-Hire Documents'. M&amp;P signed offer letters must be uploaded under '6. Pre-Hire Documents' in the take action drop down menu before moving to step 8.</p> <p>f. Once you're done, you need send your offer for approvals.</p>		
<ul style="list-style-type: none"> <li>When your adjusted job offer is complete, submit it for approval.</li> <li>For approvals, the first step is to click on the 'Review and Confirm Approvers' button.</li> </ul> <p style="text-align: center;"><span>Review and Confirm Approvers</span></p> <ul style="list-style-type: none"> <li>The initiator is taken to the 'Review and confirm Approvers' page where they can check their Approvers before Workflow is launched.</li> <li>Corrections may be necessary.</li> <li>Return to the job offer page. If approver corrections are required, click on 'Save for Later', fix your approver issues, return and start the approval process again.</li> <li>If your approvers are ok, click on the 'Save &amp; Submit' button.</li> </ul> <p style="text-align: center;"><span>Save &amp; Submit</span> <span>Save as Draft</span> <span>Cancel</span></p> <ul style="list-style-type: none"> <li>Your approvers can either approve your job offer or push it back for changes.</li> <li>For job offer, it is not allowable for an approver to also be the initiator.</li> </ul>	Manage Applicants and Openings	5.13
<ul style="list-style-type: none"> <li>If your job opening is M&amp;P or non-union and your offer is at or over max of the salary range, in addition to department approvals, your offer will also go to HR for review.</li> <li>If your job opening is CUPE 2950 or BCGEU-OK, and your applicant is internal in the same union, your offer will go to HR so they can check that the step is correct.</li> <li>Once the job offer is approved, you will receive a confirmation email. Once you receive this email, you can move forward to step 8 below.</li> </ul>	Job Description Library	5.13
<b>Step 8: Hire</b>		
<b>Prepare for Hire:</b>		
<ul style="list-style-type: none"> <li>Access an existing Job Opening from the 'Manage Applicants and Openings' menu by entering in the Job ID number or searching the fields.</li> </ul>	Manage Applicants and Openings	
<ul style="list-style-type: none"> <li>To prepare the hire, select '7. Prepare For Hire' in the take action drop down menu.</li> </ul>	Manage Applicants and Openings	5.14
<ul style="list-style-type: none"> <li>On the hire page, you will notice 3 tabs. Complete any missing information on each tab and 'Save and Submit' your hire. You don't need to click the 'Save and Submit' button on every tab; you only need to click the 'Save and Submit' button once everything is filled out. <ul style="list-style-type: none"> <li>'Preliminary Data' tab: this is where you would check the appointment start date, select the type of hire, indicate the applicants ranking, and if applicable assign an early employee ID and CWL pin number.</li> <li>'Employee Personal Information' tab: this is where information data about the employee is found. For new hires to UBC, the 'Biographical Details' section will need to be completed.</li> <li>'Appointment Information' tab: this is where you would check the appointment dates, select the appropriate 'Action Reason' corresponding to the type of hire, and check the salary.</li> <li>Once all the information in all three tabs is complete, do a 'Save and Submit' to send the hire to Payroll.</li> </ul> </li> <li>Once Payroll has transferred the hire from eRecruit into payroll, you will receive a confirmation email. You will be able to see the hire and the job ID he/she was hired into in HRMS at this point.</li> <li>Once Payroll has transferred the hire, all other applicants who applied for the position will be automatically declined. The disposition of the successful applicant will show as 'Hired' and the number of available openings will show as '0' or be reduced by 1 if the position was posted with multiple vacancies.</li> <li>Do not send Payroll or HR a paper staff appointment from for the hire done through eRecruit as it is not needed.</li> <li>If applicable, please have the hire complete and send all required paperwork (personal data, tax, direct deposit forms, and ect.) to Payroll directly.</li> </ul>	Manage Applicants and Openings	5.14