UNIVERSITY OF MASSACHUSETTS BOSTON
HUMAN RESOURCES

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PageUp User Guide

Contents

Description

PageUp is an online Applicant Tracking System for managing the recruiting process for benefitted, non-benefitted, and graduate student employee hires within UMass Boston. Should you have any questions regarding the recruitment process, please contact Kim Burke or Henry Paquin in Human Resources at kim.burke@umb.edu or henry.paquin@umb.edu.

Website information

Login information

- http://umass.pageuppeople.com.
- From the login screen, enter your campus ID and password.
- *Select Boston for your campus from the dropdown list.*
- Select to login.

Careers websites (Job Postings)

- UMass Boston: https://hr.umb.edu/jobs
- System Site: http://careers.massachusetts.edu

Permissions

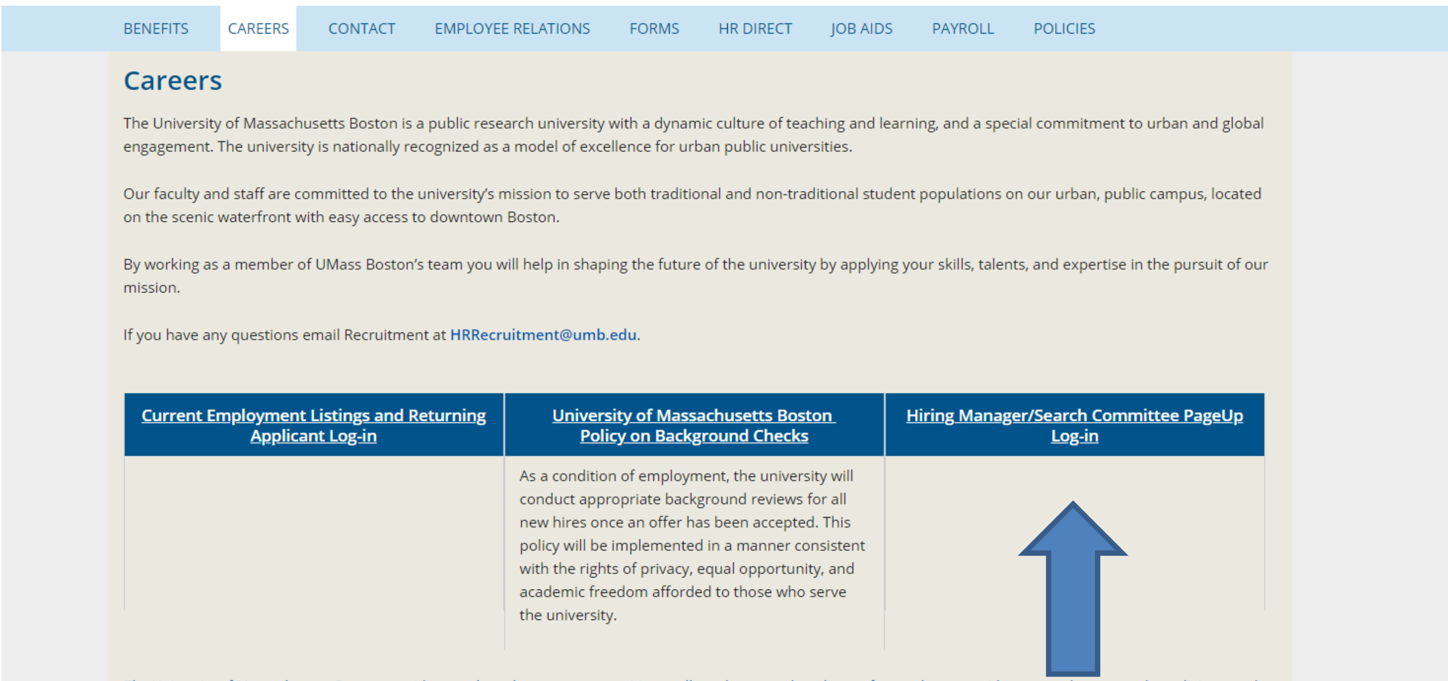
Based on the permissions that you have been granted in PageUp, not all features/functions described in this document may be available to you. Please email kim.burke@umb.edu or henry.paquin@umb.edu if any questions.

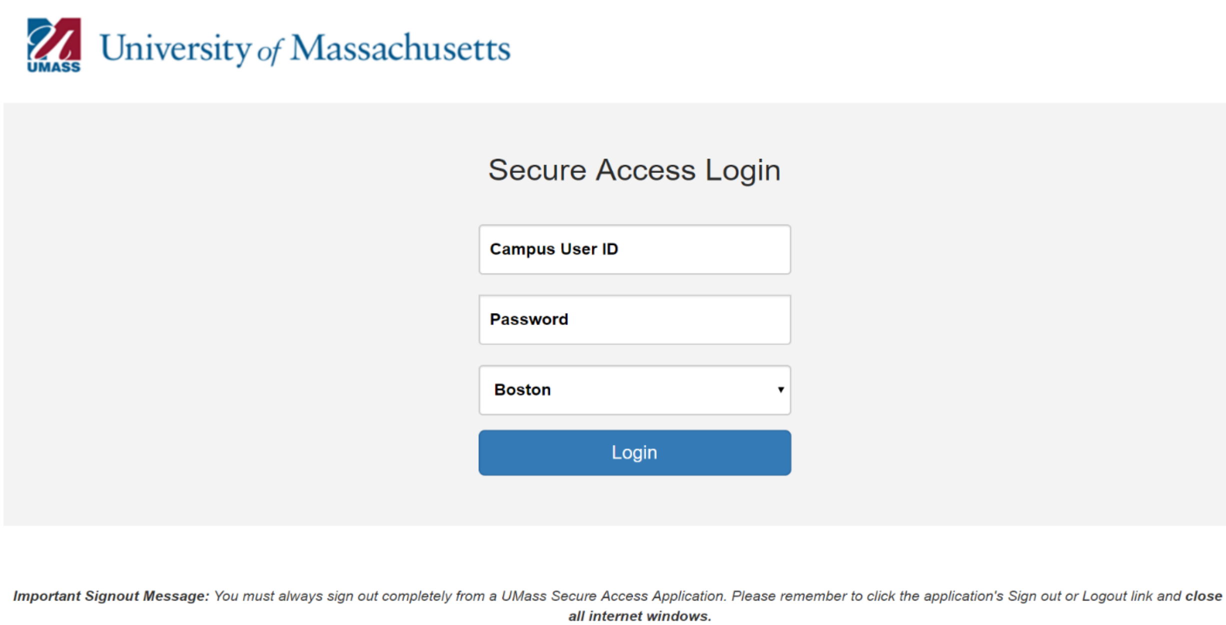
General guidelines for using PageUp

- **Do not use** the **Back** button in your browser to go back to the previous page, as your session will be interrupted and you may lose your changes.
- Your session will timeout after **120 minutes** of inactivity.
- Do not share your login details with any other person.
- Clean cache if unable to login or unable to view stacked menu options

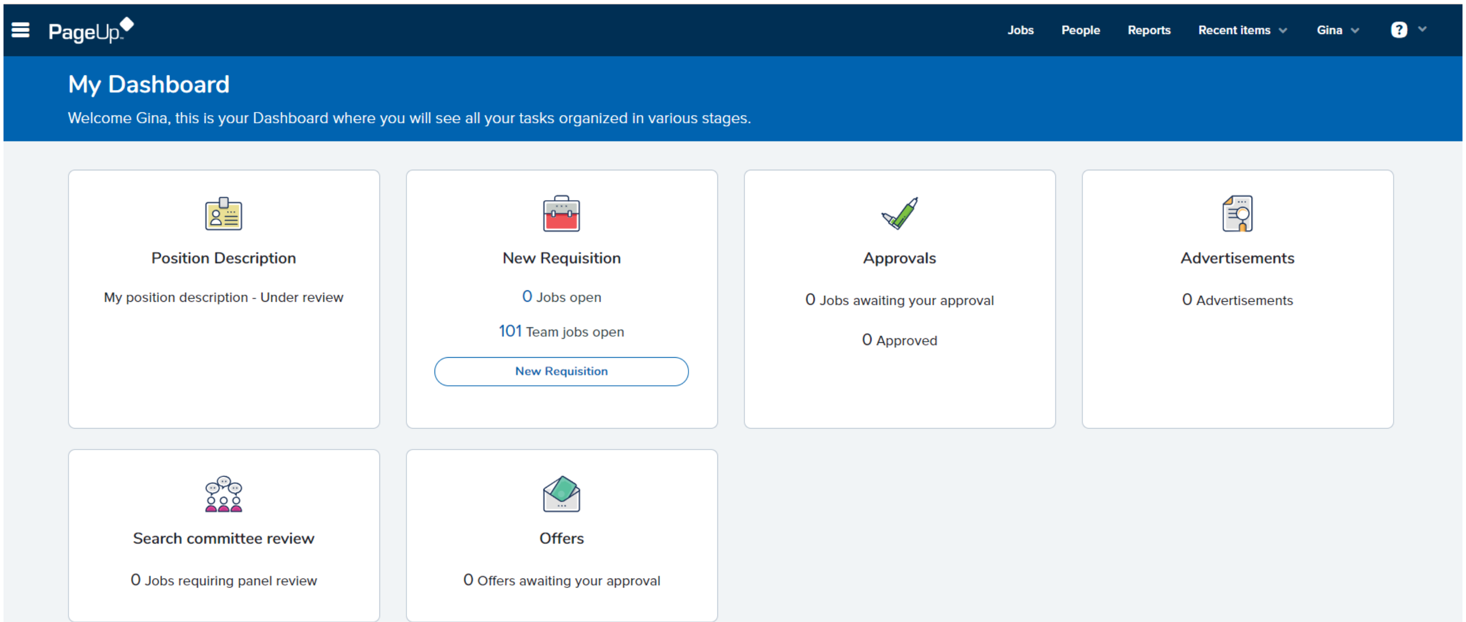
Logging In

The link to log into PageUp can be found on the Human Resources website, under Careers. You will click on “Hiring Manager/Search Committee PageUp Log-in.” You will be prompted with the login screen, enter your campus ID and password. Select Boston for your campus from the dropdown list. Select to login.





Dashboard



This dashboard is the landing page for the hiring manager permission group within the system.

A **Permission Group** determines what level access a PageUp user has within the system. There are different roles within the recruitment and hiring process and therefore the need for various levels of permission. Human Resources assigns users their permission group based on the needs of the department. The permission group with the most powerful role for each search will be the Hiring Manager. They will be responsible for creating requisitions, the day-to-day management of the search, applicant management, and will be the main point of contact with HR. Hiring Managers will have access to applicants and the submission of first round applicants.

This dashboard provides a summary of their current work and the ability to access jobs and applicants from the homepage. Jobs you have created will appear on your dashboard. Click **Dashboard** in the left side menu to view available options. You will see your jobs in the **Current jobs** column grouped by job status. The job statuses can be expanded/collapsed to view your job details.

Hiring Manager Information– access to the job

Each job on the Hiring Manager dashboard will contain the information icon. This icon provides a summary of the job and the applicants that have applied for the job. From this icon, you can click on the job title which will take you to the requisition or open a specific applicant card.

Field types

Fields in PageUp are filled in by entering data directly on the screen or selecting from drop down or lookup lists. Described here are some common field types and how to fill them in.

Mandatory fields

Mandatory fields are flagged with a star. These must be completed when filling in a screen.

Lookup or Binoculars fields

Binocular fields are used to allow users to select from a large set of data e.g. users or departments. To populate binocular fields, click on the binocular icon to view a pop up window which will allow you to search through the data. Select the data you would like to enter by clicking on the appropriate row, then click OK.

Lists of information

All lists of information throughout the system support the following functions:

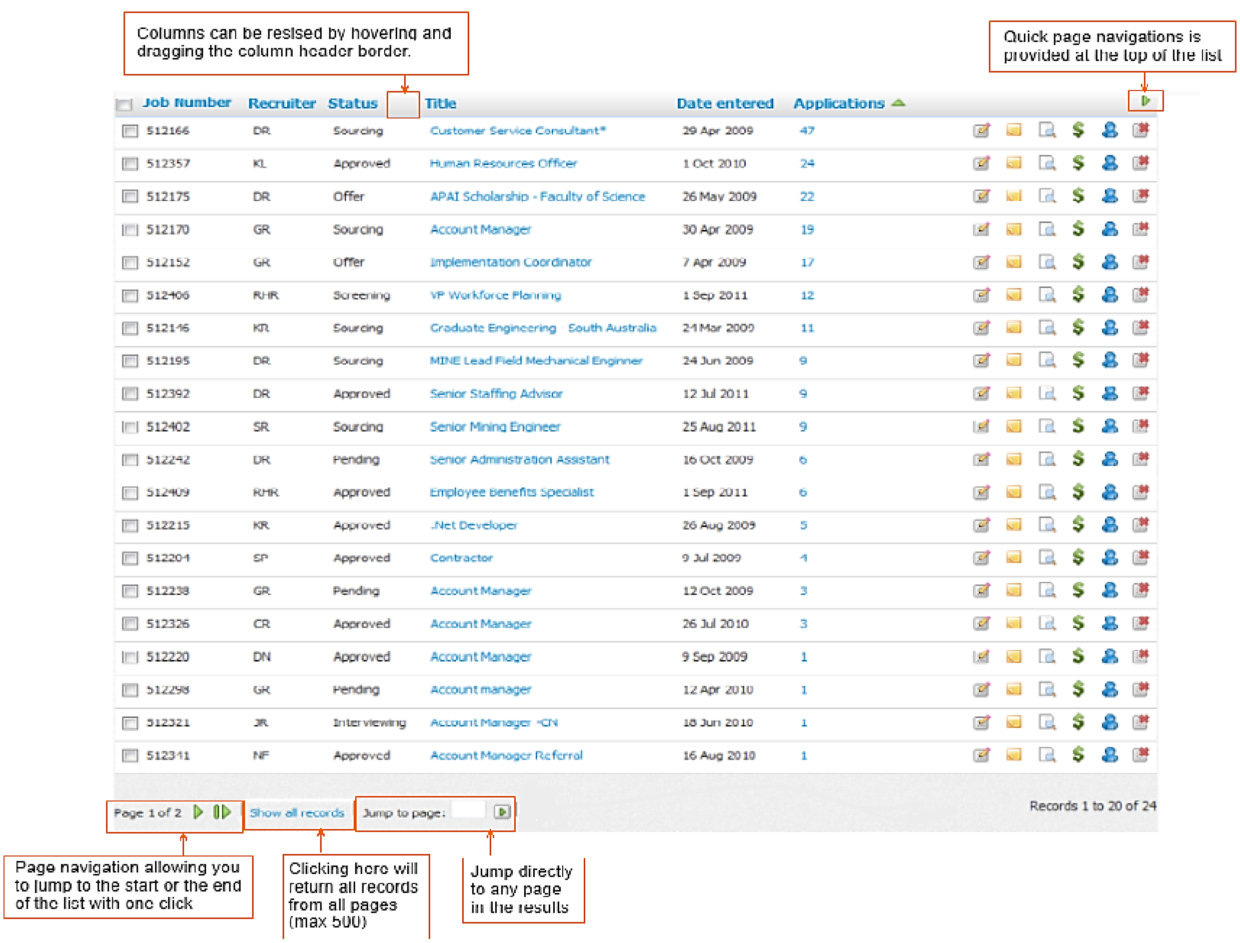
- Enhanced navigation between pages of information.
- Show or hide columns.
- Change the number of records displayed per page.
- Show all records.

Navigation

Navigating between pages of information

When too many results are returned to display on a single page, PageUp provides a number of navigation options (see below)

Navigation functions at a glance



Navigate between pages

Click on the appropriate navigation icon, or enter a page number into the Jump to page field and click the button. You will be taken to the page you selected.

Showing all records

Note: A maximum of 500 records will be displayed using this function

1. Click the Show all records link at the bottom of the list. If there are more than 500 records in your list, a warning message will be displayed confirming that only the first 500 records will be returned.
2. The screen will re-load will all records displayed. Note: Depending on the amount of information being returned, this may take up to a few minutes to complete.
3. To return to your standard list of information, click the Return to standard list link at the bottom of the list.

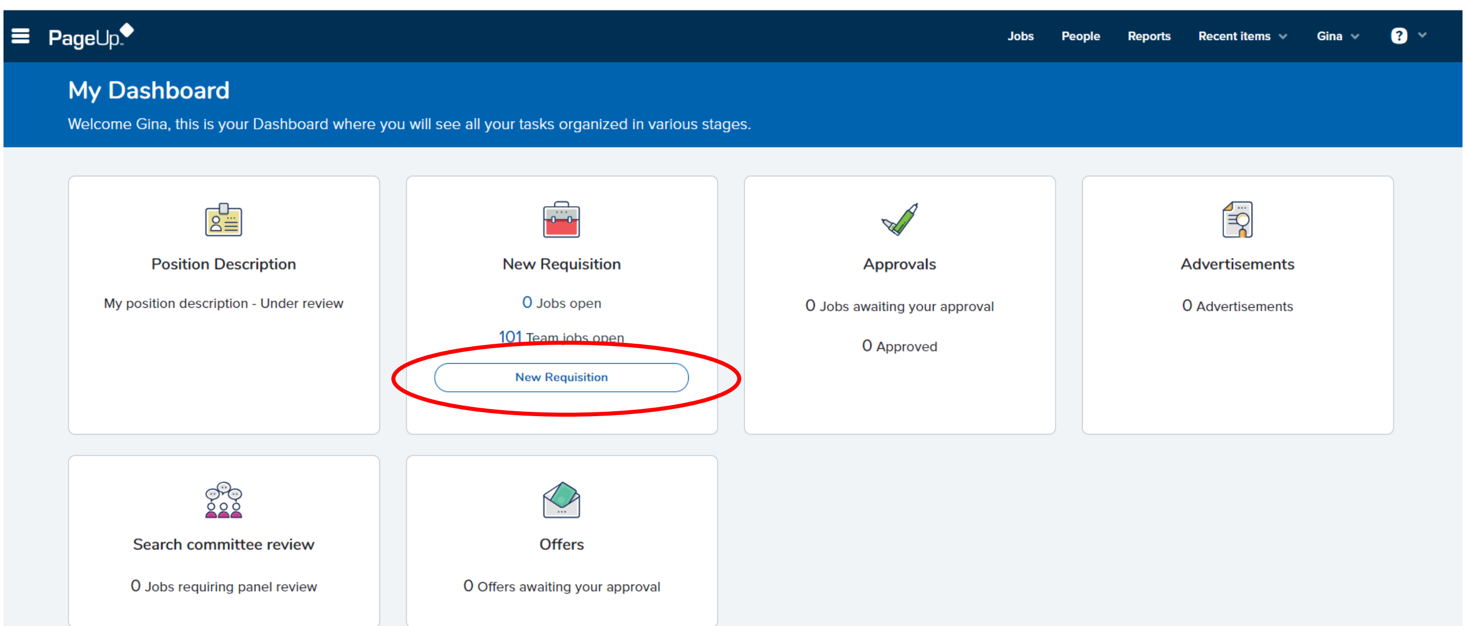
Recruitment

Recruit for a position

Before recruiting for an approved position, you should familiarize yourself with certain Roles found within the Requisition. PageUp Roles and Terms are found at the end of this document.

Creating a Requisition for posting

Each new **Requisition** must contain an approved job description, evaluation memo and the position number that corresponds to the position being filled. To confirm the correct approved job description, please contact Tom Kelly at thomas.kelly@umb.edu. To confirm the correct position number, please contact Gerald Ellis at gerald.ellis@umb.edu. **To ensure data integrity with HR Direct and PageUp reporting, position number data must correspond exactly with the position being filled.**

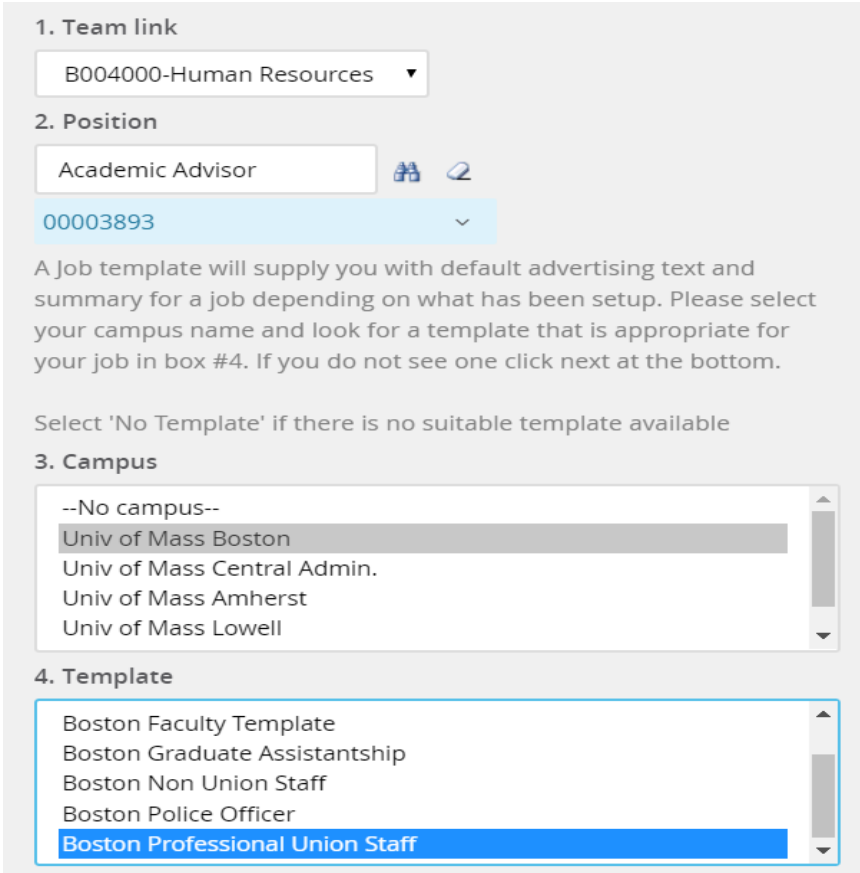


Selecting a Posting Template

Team Link will default to the department you have been assigned to in HR Direct. If you have any questions regarding this team access, please contact Human Resources.

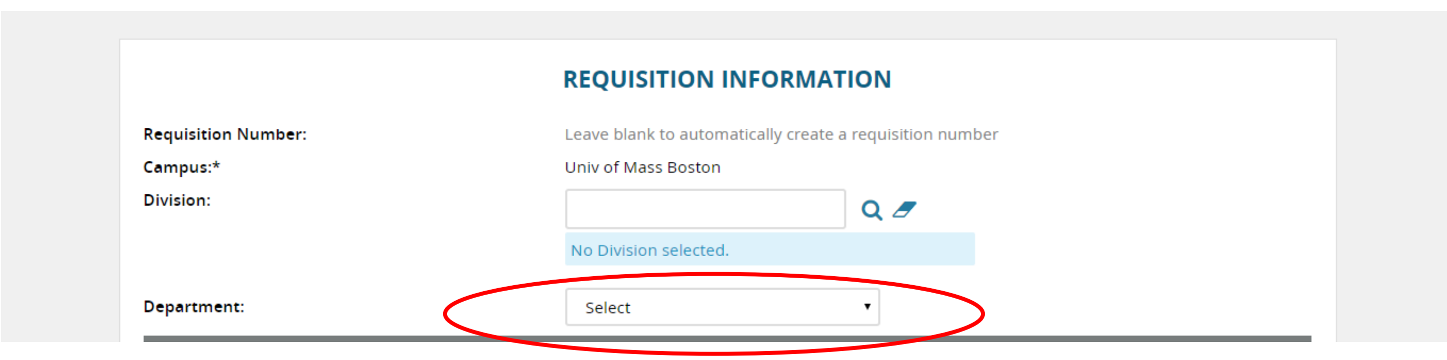
Enter the position number. Select **UMass Boston** from the Campus drop-down menu. Select the **Posting Template** that corresponds with the position being filled.

Select **Next** to open the **Requisition**.



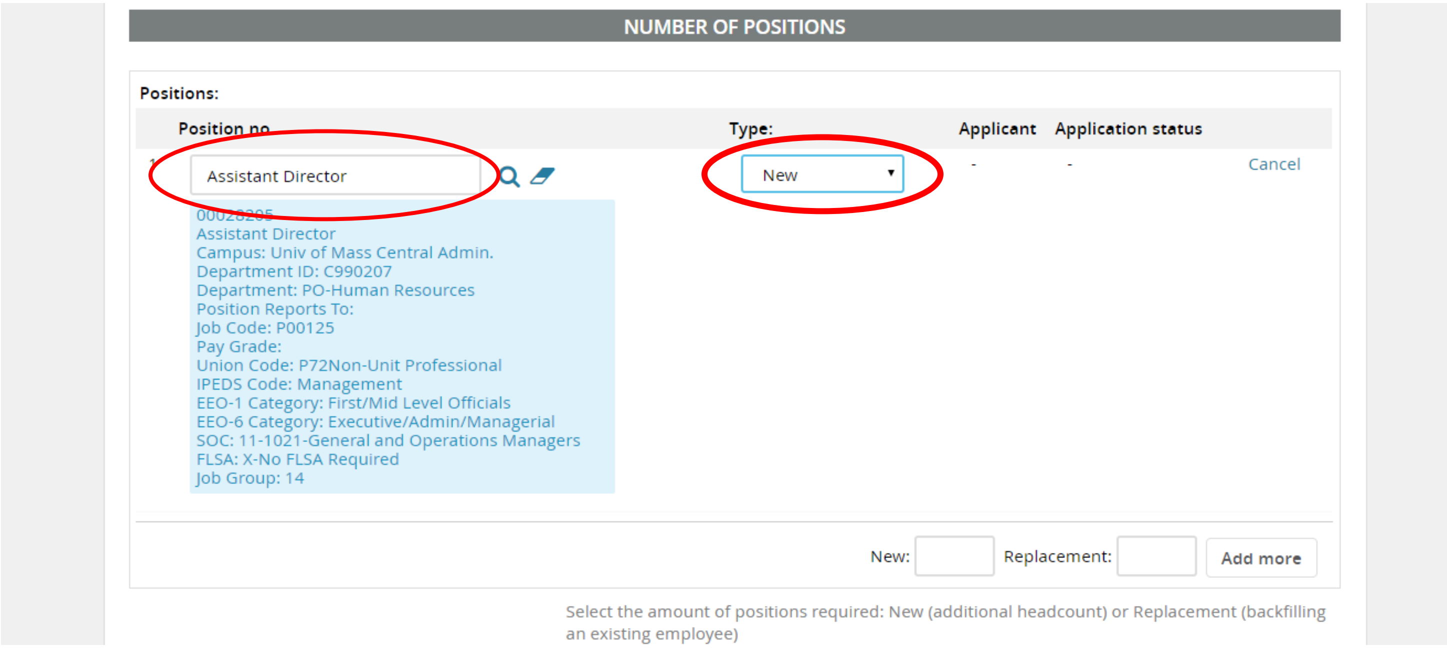
Department and Position Number

Select your department from the Department drop-down menu.



In the **Position No** search field you should enter the Position Number that corresponds to the position being filled, if not previously entered, then hit tab. A Blue Box under the Position No will populate and the information should mirror the Blue Box below. **Please note that the position number entered must be an approved budgeted position number and all data must match the position being filled.**

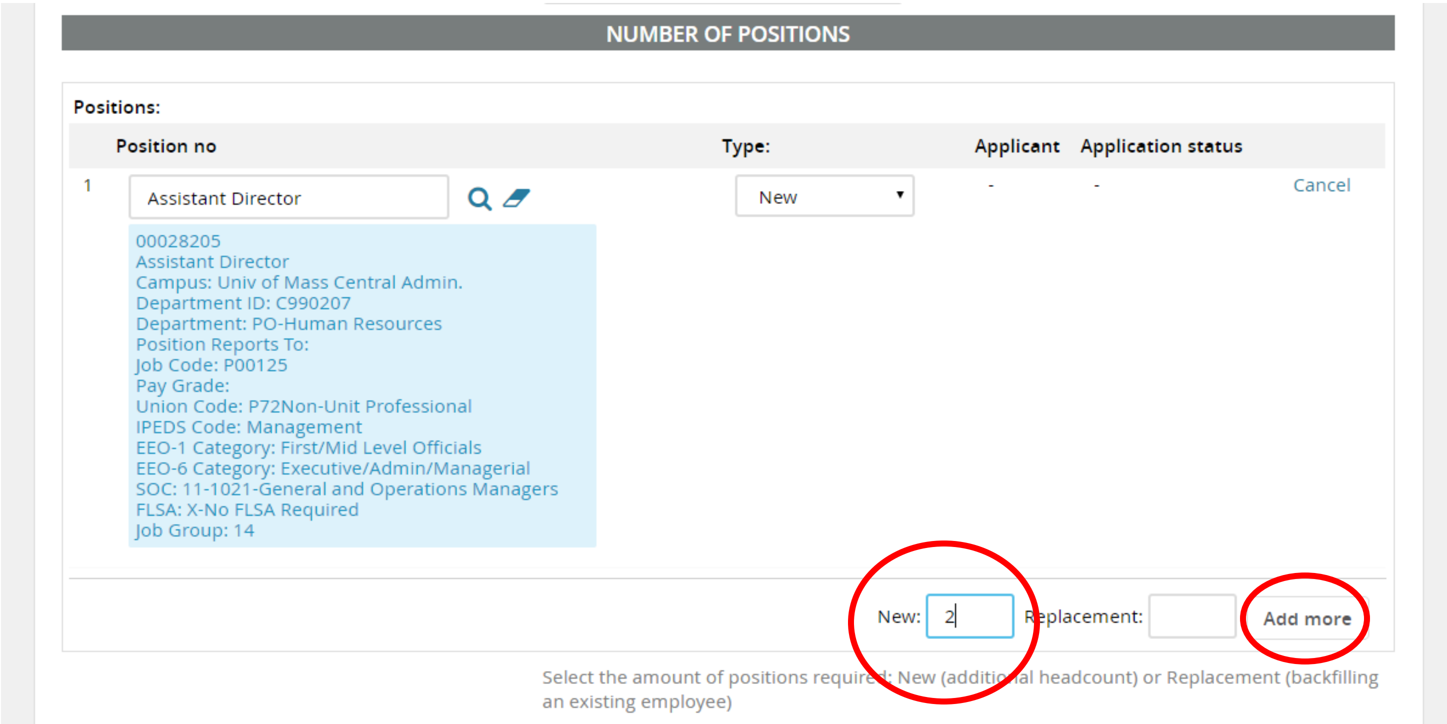
The Position Type you select is dependent upon whether or not there is an incumbent in the position you are hiring for. If there is no current or former incumbent and the position is a new Headcount for your department, you should select **New**. If there is not a new Headcount for your department you should select **Replacement.**

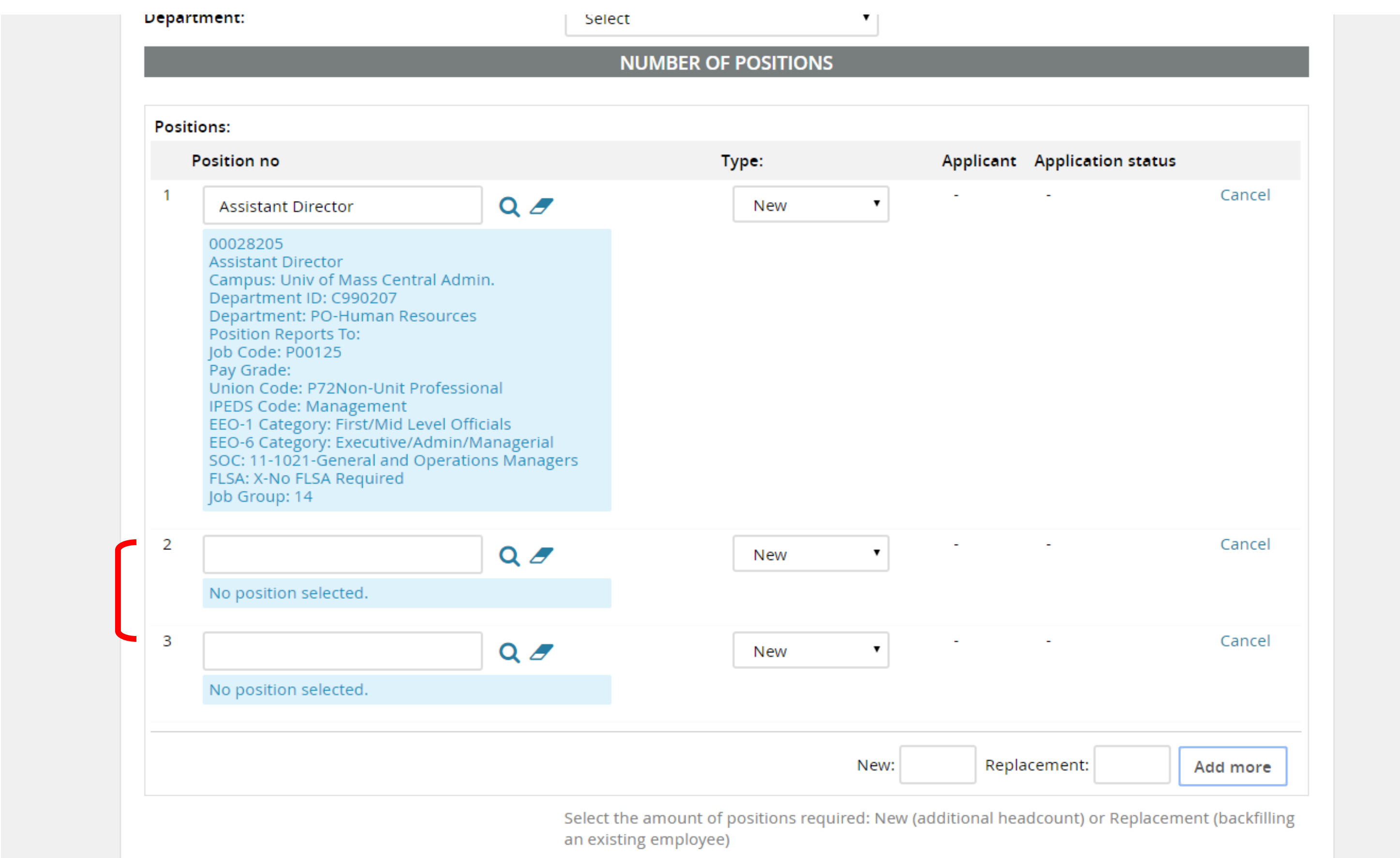


Recruit for Multiple Positions with the same job description

To recruit for multiple positions enter the number of **Positions** in as a new position or as a **Replacement** position. Once you enter the amount of Positions you are hiring against for the **Position Description**, you must click **Add.**

You are able to recruit for multiple positions for the same Job Description**,** however, ***<u>every position requires a position number</u>***. For example, if there are 3 position numbers that need to be filled for one **Job Requisition**, you can enter the number 2 and the system will open two more job slots. You will need to assign an approved **Position Number to each opening**. As applicants are hired, the system will attach the appropriate **Position Number** and populate the applicant name and offer status. Once the final position is filled, the system will prevent additional applicants from being hired.

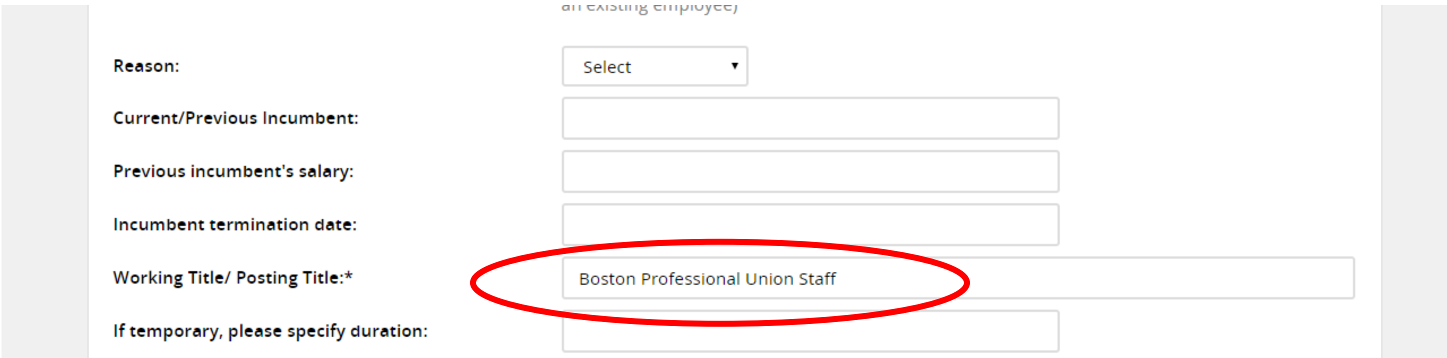

NUMBER OF POSITIONS
Positions:
Position no
Type:
Applicant
Application status
1
Assistant Director
New
-
-
Cancel
00028205
Assistant Director
Campus: Univ of Mass Central Admin.
Department ID: C990207
Department: PO-Human Resources
Position Reports To:
Job Code: P00125
Pay Grade:
Union Code: P72Non-Unit Professional
IPEDS Code: Management
EEO-1 Category: First/Mid Level Officials
EEO-6 Category: Executive/Admin/Managerial
SOC: 11-1021-General and Operations Managers
FLSA: X-No FLSA Required
Job Group: 14
New: 2
Replacement:
Add more
Select the amount of positions required: New (additional headcount) or Replacement (backfilling an existing employee)


Department:
Select
NUMBER OF POSITIONS
Positions:
Position no
Type:
Applicant
Application status
1
Assistant Director
New
-
-
Cancel
00028205
Assistant Director
Campus: Univ of Mass Central Admin.
Department ID: C990207
Department: PO-Human Resources
Position Reports To:
Job Code: P00125
Pay Grade:
Union Code: P72Non-Unit Professional
IPEDS Code: Management
EEO-1 Category: First/Mid Level Officials
EEO-6 Category: Executive/Admin/Managerial
SOC: 11-1021-General and Operations Managers
FLSA: X-No FLSA Required
Job Group: 14
2
New
-
-
Cancel
No position selected.
3
New
-
-
Cancel
No position selected.
New:
Replacement:
Add more
Select the amount of positions required: New (additional headcount) or Replacement (backfilling an existing employee)

Position Background and Working Title

All requisitions must have the correct **Working Title/ Posting Title** for the job description being filled.

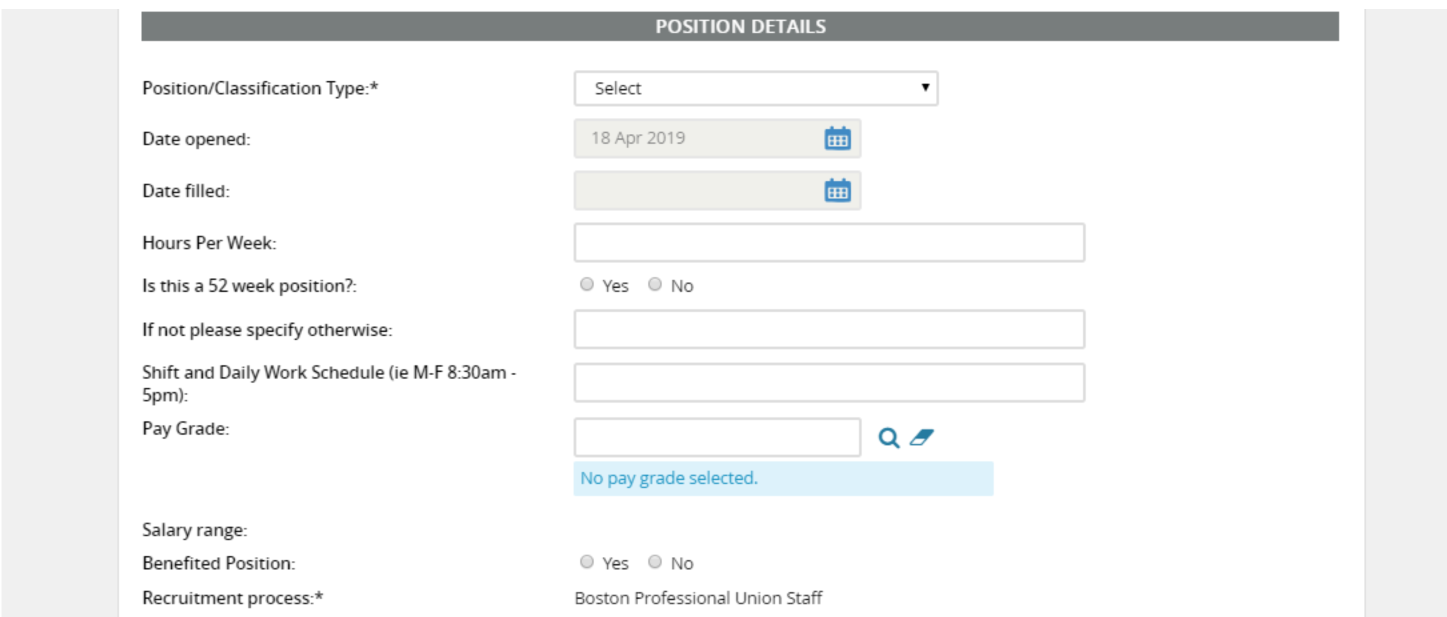
If the requisition is backfilling a previous incumbent, details of that incumbent must be included in this section as well.


an existing employee)

Reason:	Select
Current/Previous Incumbent:	
Previous incumbent's salary:	
Incumbent termination date:	
Working Title/ Posting Title:*	Boston Professional Union Staff
If temporary, please specify duration:	

Position Details

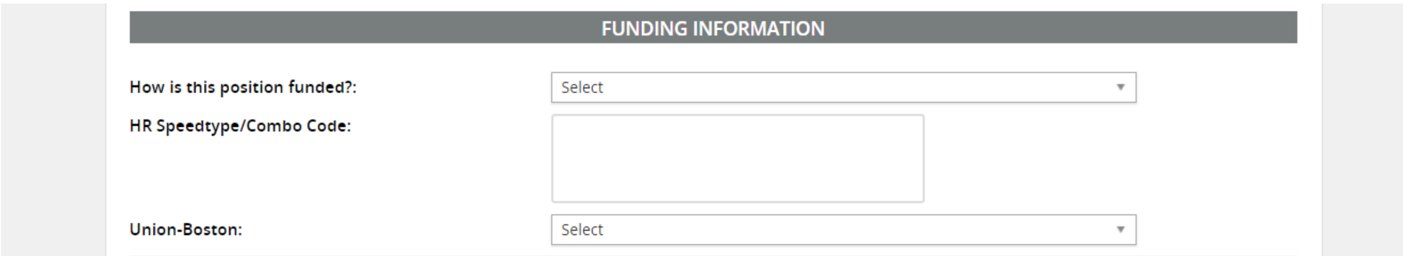
Complete the fields in the Position Details section. If you are filling a union position, Pay Grade is a required field.


POSITION DETAILS

Position/Classification Type:*	Select
Date opened:	18 Apr 2019
Date filled:	
Hours Per Week:	
Is this a 52 week position?:	Yes No
If not please specify otherwise:	
Shift and Daily Work Schedule (ie M-F 8:30am - 5pm):	
Pay Grade:	No pay grade selected.
Salary range:	
Benefited Position:	Yes No
Recruitment process:*	Boston Professional Union Staff

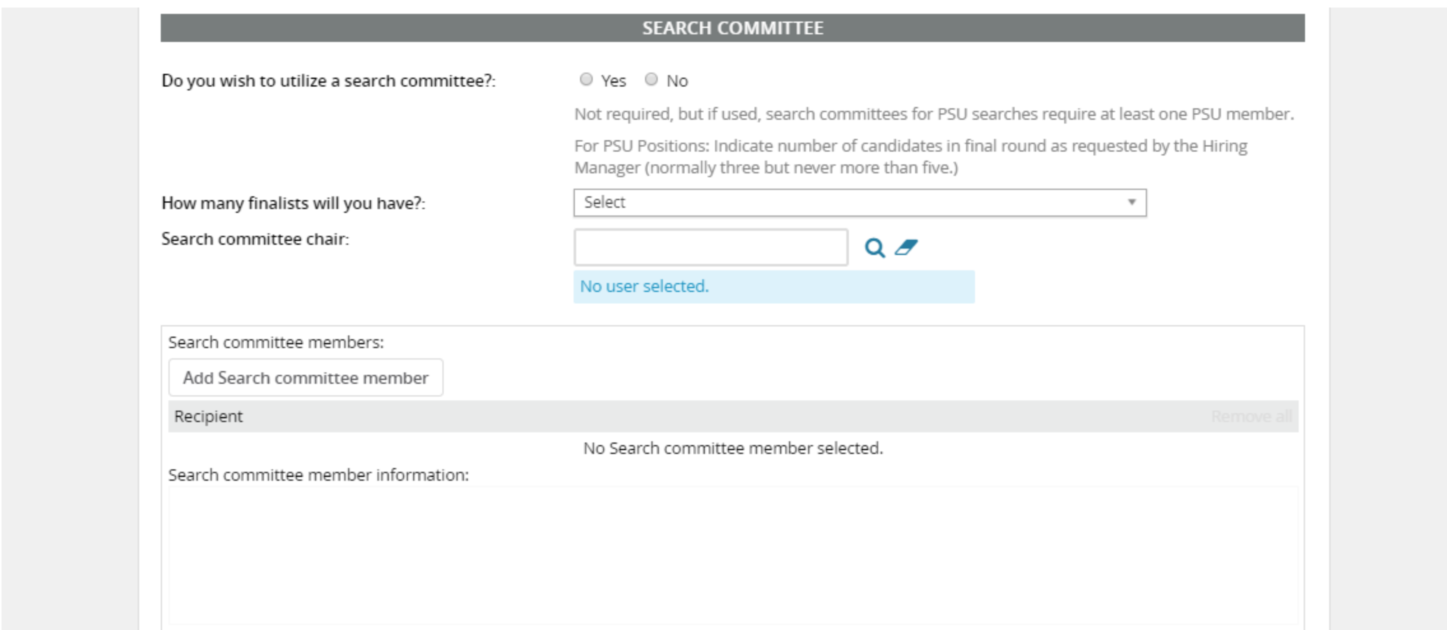
Funding Source, Percentage and Speedtype

You should indicate whether this position is funded via State Funds or Grants, the primary percentage of salary dedicated to the payroll and your department's payroll Speedtype.

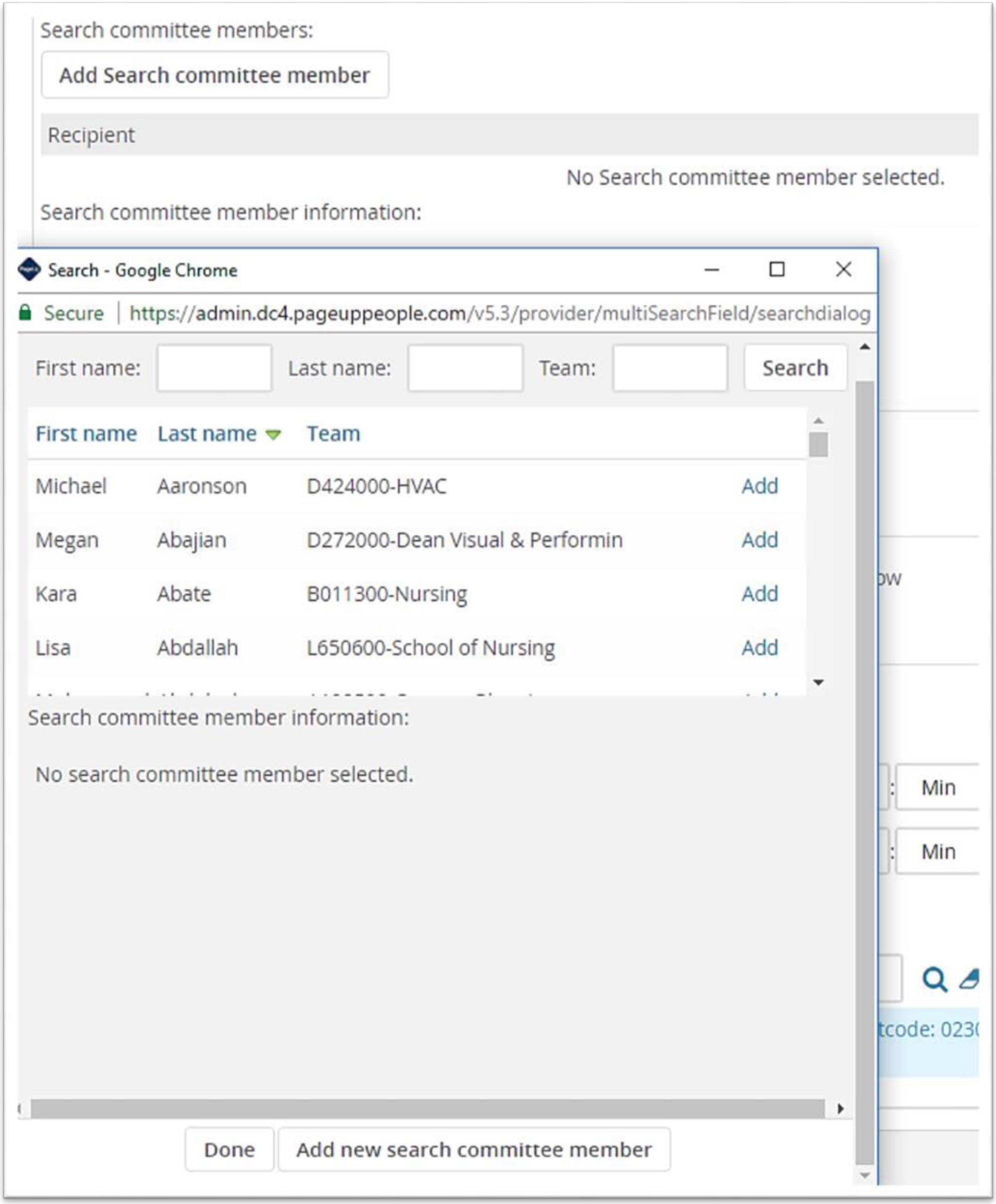


Search Committee

Search committees are not required. If you are choosing to, select "Yes" that you would like to utilize a Search Committee and identify your **Search Committee Chair**. Using the magnifying glass will help you easily search for UMass employees. **Please remember to allow pop-ups within your browser.**

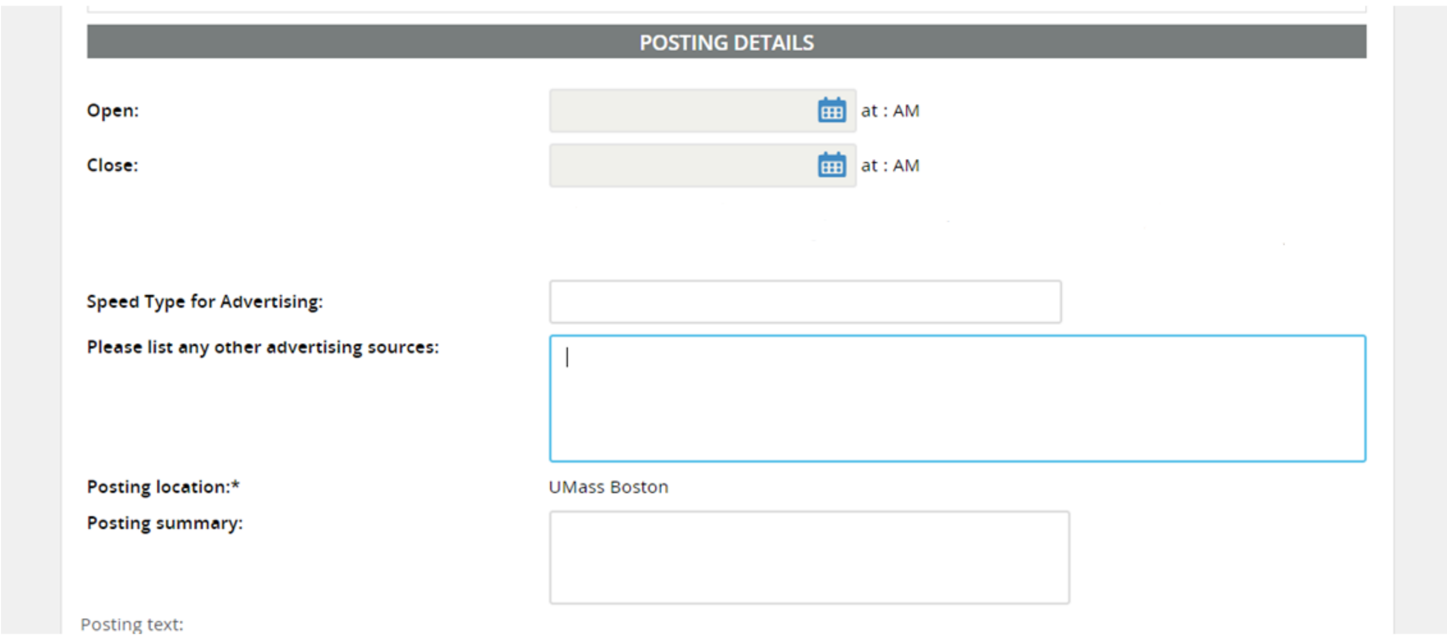


To add search committee members, select **Add Search Committee Member.** Find the Committee Member and select **Add.** Continue to add members until done. Click the done button when finished to verify that all committee members have been added.


Search committee members:
Add Search committee member
Recipient
No Search committee member selected.
Search committee member information:
Search - Google Chrome
Secure
https://admin.dc4.pageuppeople.com/v5.3/provider/multiSearchField/searchdialog
First name:
Last name:
Team:
Search
First name
Last name
Team
Michael Aaronson D424000-HVAC Add
Megan Abajian D272000-Dean Visual & Performin Add
Kara Abate B011300-Nursing Add
Lisa Abdallah L650600-School of Nursing Add
Search committee member information:
No search committee member selected.
Min
Min
Done
Add new search committee member

Posting Details

In this section, indicate if an external advertisement is needed for your posting and the speed type for recharge purposes. HR will confirm final advertising costs prior with hiring departments prior to placement.



POSTING DETAILS

Open: at : AM

Close: at : AM

Speed Type for Advertising:

Please list any other advertising sources:

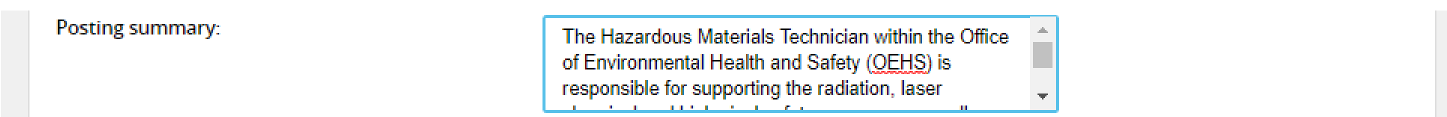
Posting location:* UMass Boston

Posting summary:

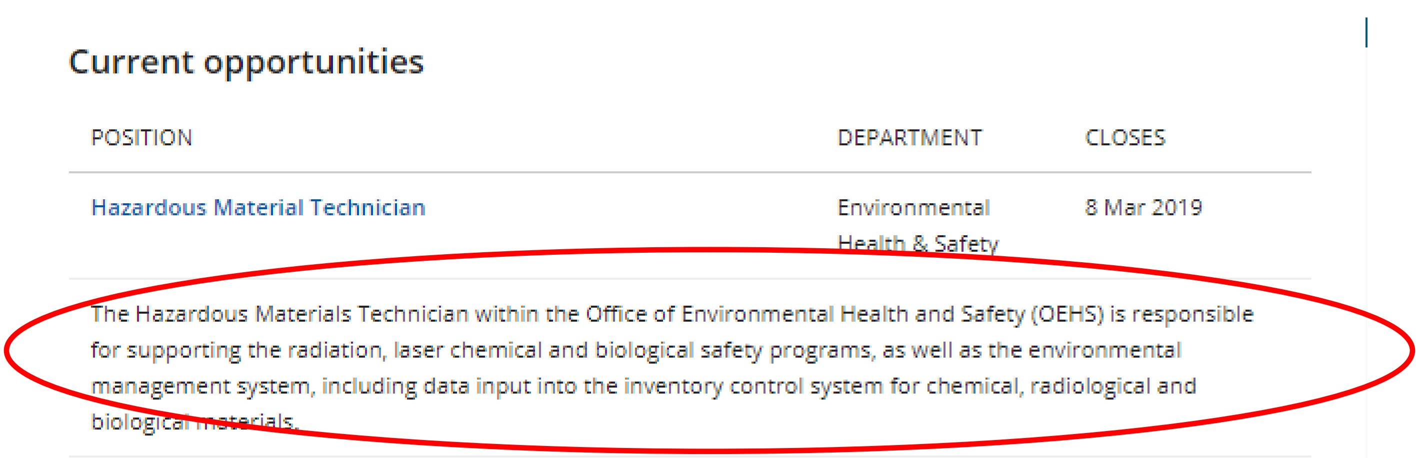
Posting text:

Posting Location should always be UMass Boston.

Posting Summary is introductory text that will appear on the University's Employment Opportunities website, advertising the job. The text should be descriptive enough to make an applicant interested in the position.



Posting summary: The Hazardous Materials Technician within the Office of Environmental Health and Safety (OEHS) is responsible for supporting the radiation, laser

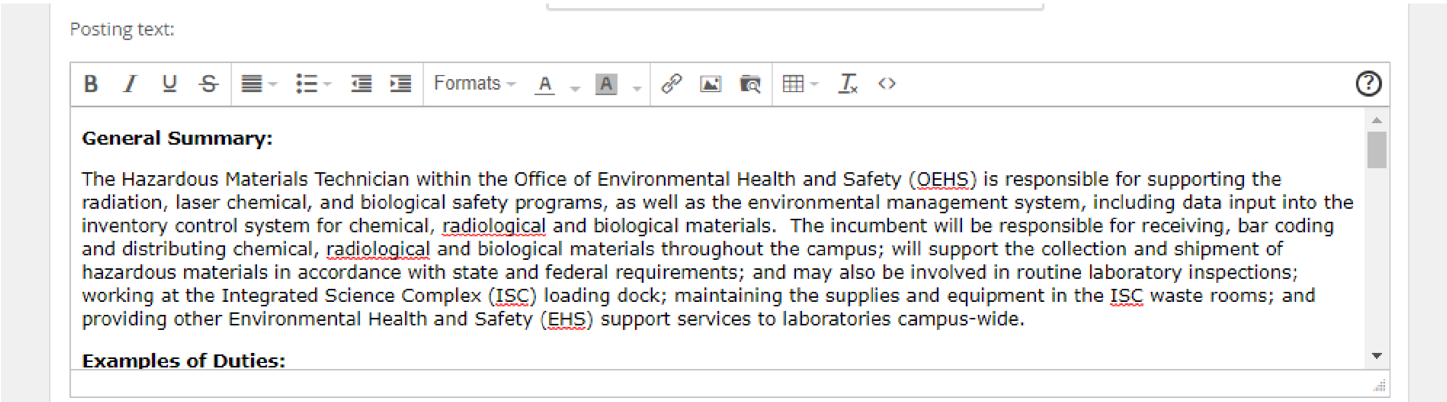


Current opportunities

POSITION	DEPARTMENT	CLOSES
Hazardous Material Technician	Environmental Health & Safety	8 Mar 2019

The Hazardous Materials Technician within the Office of Environmental Health and Safety (OEHS) is responsible for supporting the radiation, laser chemical and biological safety programs, as well as the environmental management system, including data input into the inventory control system for chemical, radiological and biological materials.

The **Posting Text** must be copied and pasted directly from the HR approved **Position Description**.



Posting text:

Formats

General Summary:

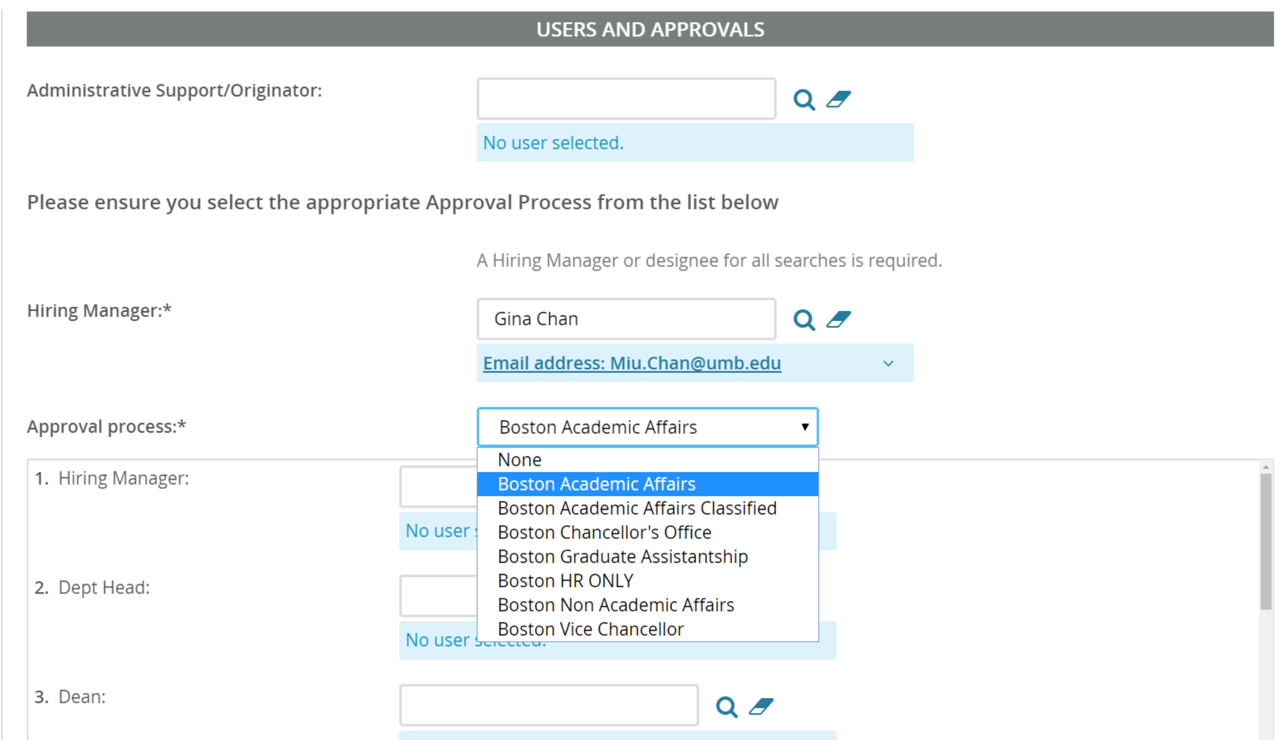
The Hazardous Materials Technician within the Office of Environmental Health and Safety (OEHS) is responsible for supporting the radiation, laser chemical, and biological safety programs, as well as the environmental management system, including data input into the inventory control system for chemical, radiological and biological materials. The incumbent will be responsible for receiving, bar coding and distributing chemical, radiological and biological materials throughout the campus; will support the collection and shipment of hazardous materials in accordance with state and federal requirements; and may also be involved in routine laboratory inspections; working at the Integrated Science Complex (ISC) loading dock; maintaining the supplies and equipment in the ISC waste rooms; and providing other Environmental Health and Safety (EHS) support services to laboratories campus-wide.

Examples of Duties:

Users and Approvers

In the Users and Approvers section, you will identify the appropriate **Approval Process** and ensure that a **Hiring Manager** has been assigned to the requisition.

Whomever initiated the recruitment process, their name will automatically populate into the **Hiring Manager** field. The Administrative Support/Originator should put in the correct Hiring Manager's name in that field and add their name into the **Administrative Support/Originator's** field. The appropriate approval process for the department should be selected from the Approval Process drop down list.



USERS AND APPROVALS

Administrative Support/Originator:

No user selected.

Please ensure you select the appropriate Approval Process from the list below

A Hiring Manager or designee for all searches is required.

Hiring Manager:* Gina Chan

Email address: Miu.Chan@umb.edu

Approval process:* Boston Academic Affairs

None
Boston Academic Affairs
Boston Academic Affairs Classified
Boston Chancellor's Office
Boston Graduate Assistantship
Boston HR ONLY
Boston Non Academic Affairs
Boston Vice Chancellor

1. Hiring Manager:

No user

2. Dept Head:

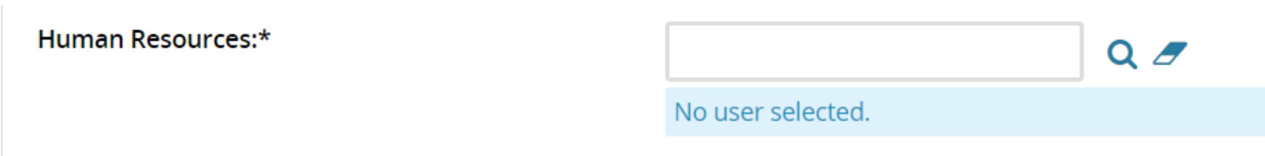
No user selected.

3. Dean:

No user selected.

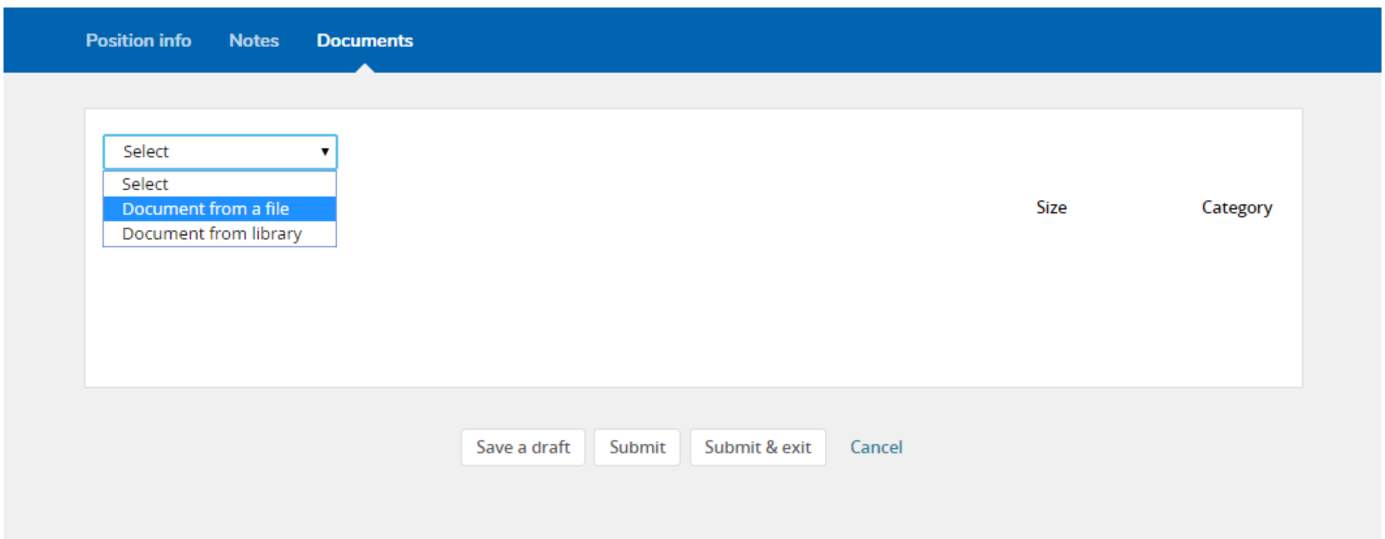
After selecting an approval process, names may prepopulate into the approval process, however the user will have the ability to change names within the approval process. Human Resources advises you not to change the names that prepopulate unless you are aware that an individual is on vacation or a name is incorrect. Should names need to be updated after submission, please contact Human Resources. Names within the sections below will all receive emails at different stages of the process. The **Hiring Manager** and **Administrative Support/ Originator** will receive an email when the Requisition has been fully approved. Approvers will receive email notifications sequentially. Once a requisition is fully approved, Human Resources will post the job.

An **HR recruitment team member** will need to be indicated on the requisition. Please refer to the departmental distribution list for your representative.

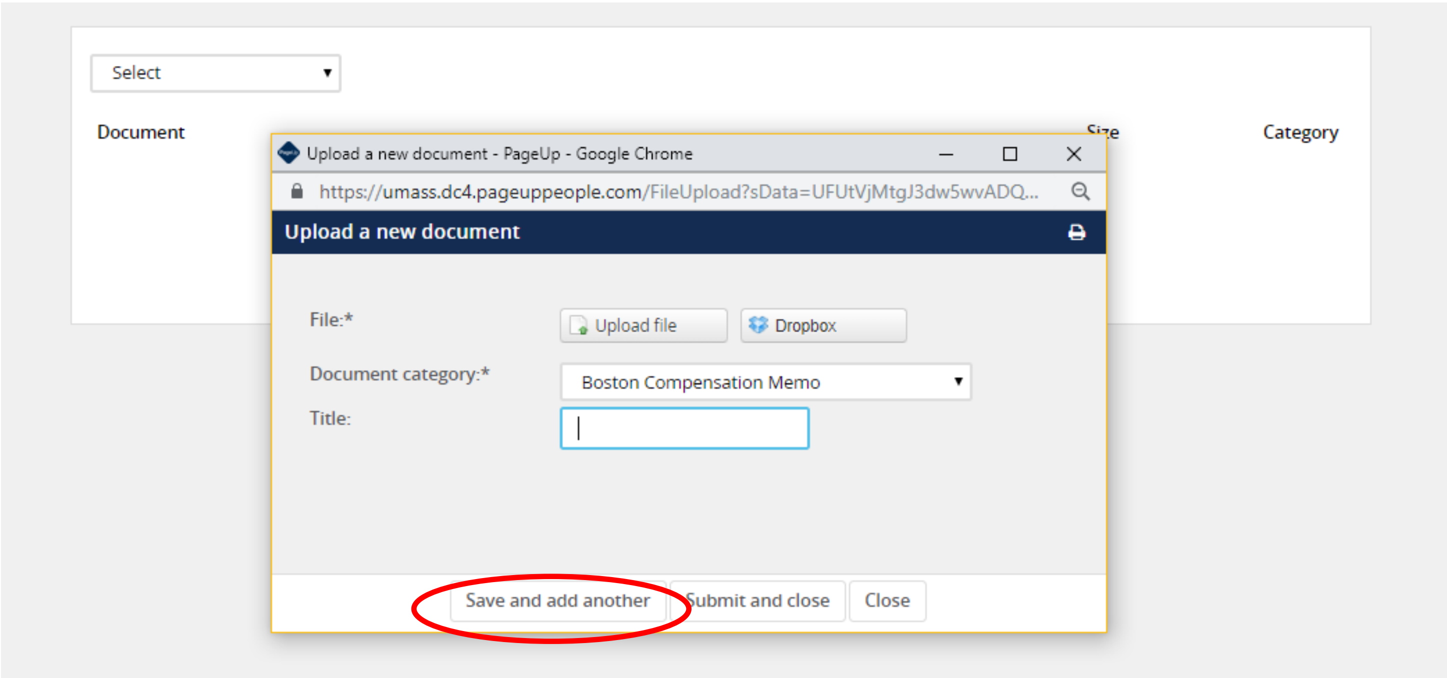


Adding Documents

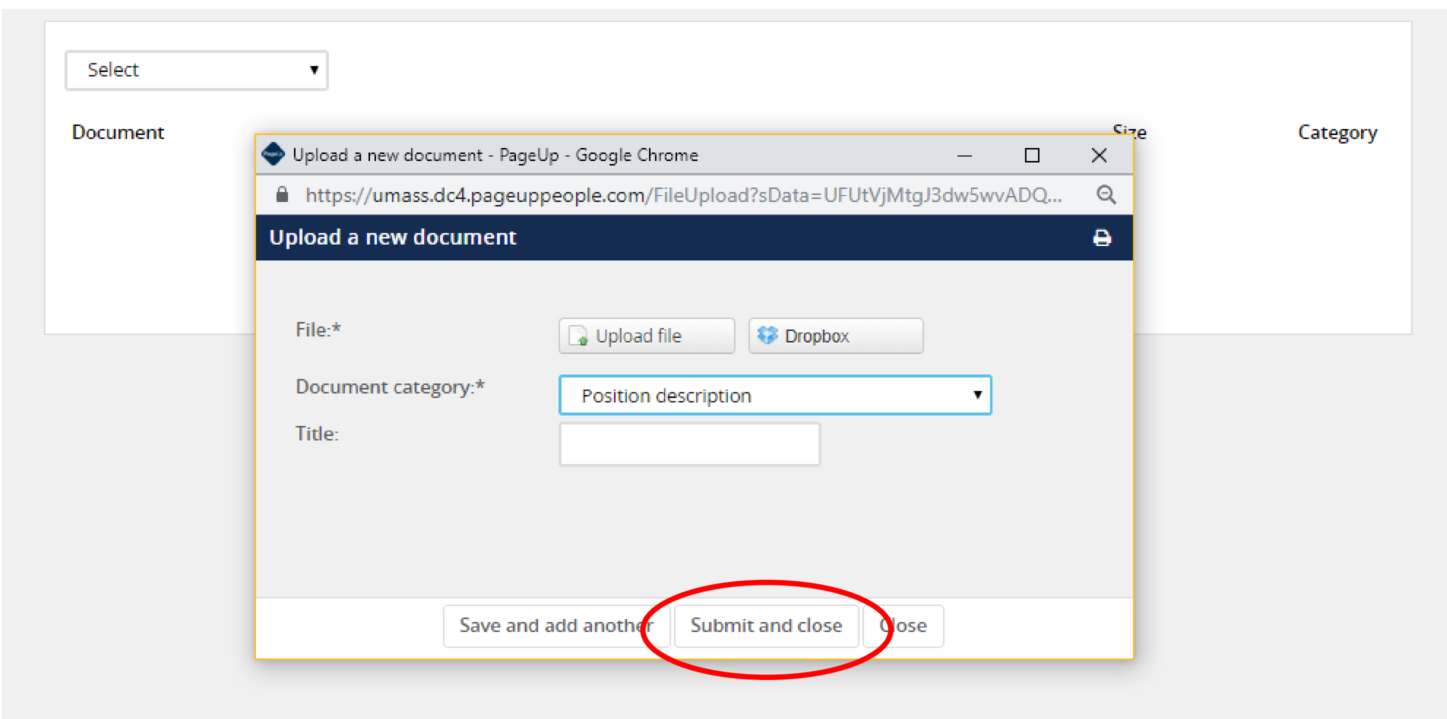
Before saving and submitting the Requisition, the approved Job Description and Evaluation Memo must be attached to the **Documents** tab of the Requisition.



Select Boston Compensation Memo from the Document category drop-down menu. Once the document is uploaded, select **Save and Add Another** to add the position description.



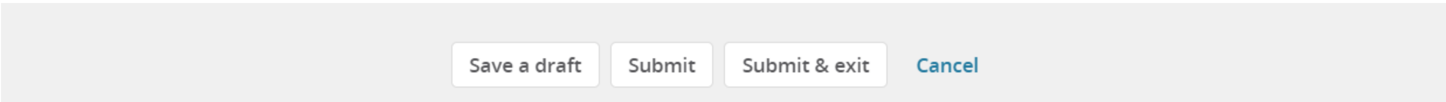
Select Position Description from the Document category drop-down menu. Once document is uploaded, select **Submit and Close**.



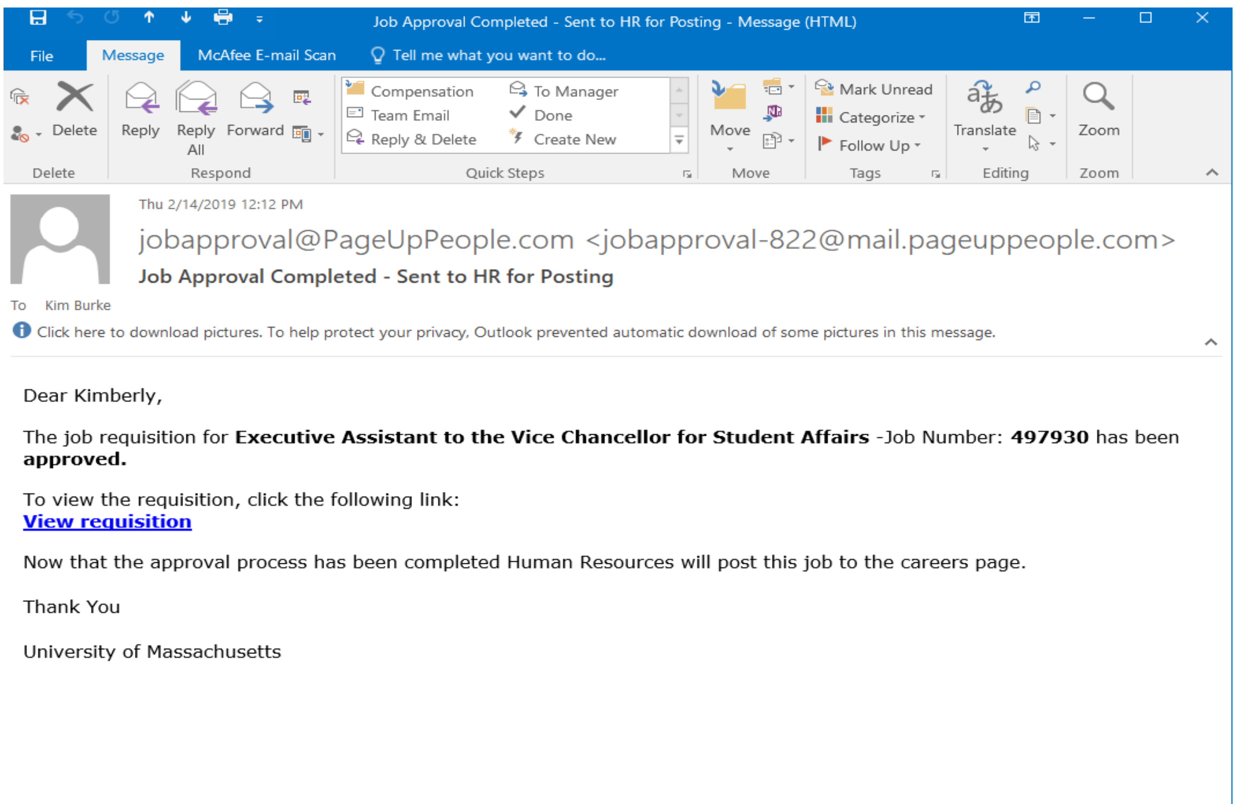
Note: If you are requesting a Posting Waiver, the memo that explains the reason for a waiver, position description, and evaluation memo must be attached to the Requisition before saving and submitting.

Saving and Submitting the Requisition

- Selecting **Save a Draft** can be used when you need to save the Requisition you are working on without starting the approval process.
- **Submit** will save and begin the approval process on your Requisition.
- **Submit and Exit** will save and begin the approval process and exit your screen back to the home screen.
- **Cancel** will exit the Requisition without saving.



Hiring Managers and Administrative Support/Originators will receive an email when the requisition has been approved and is with HR.


Job Approval Completed - Sent to HR for Posting - Message (HTML)

Thu 2/14/2019 12:12 PM

jobapproval@PageUpPeople.com <jobapproval-822@mail.pageuppeople.com>

Job Approval Completed - Sent to HR for Posting

To Kim Burke

Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

Dear Kimberly,

The job requisition for **Executive Assistant to the Vice Chancellor for Student Affairs** -Job Number: **497930** has been **approved.**

To view the requisition, click the following link:
View requisition

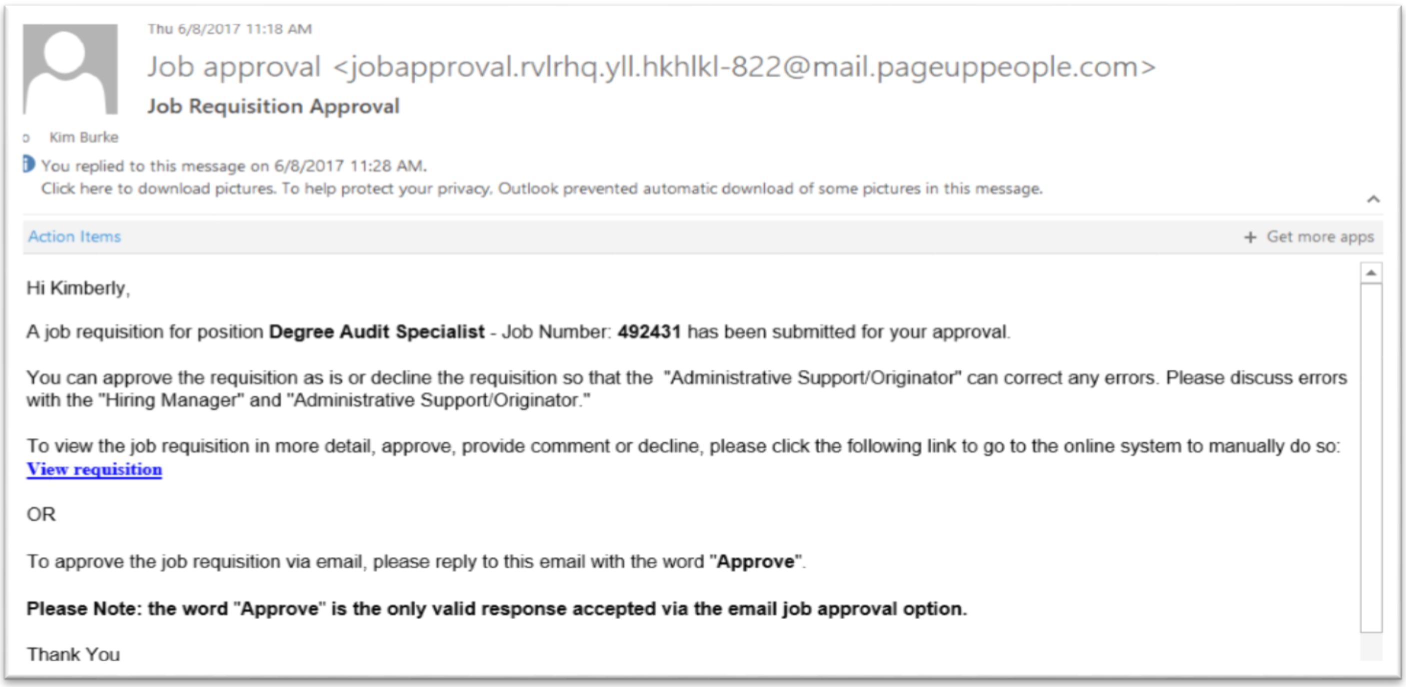
Now that the approval process has been completed Human Resources will post this job to the careers page.

Thank You

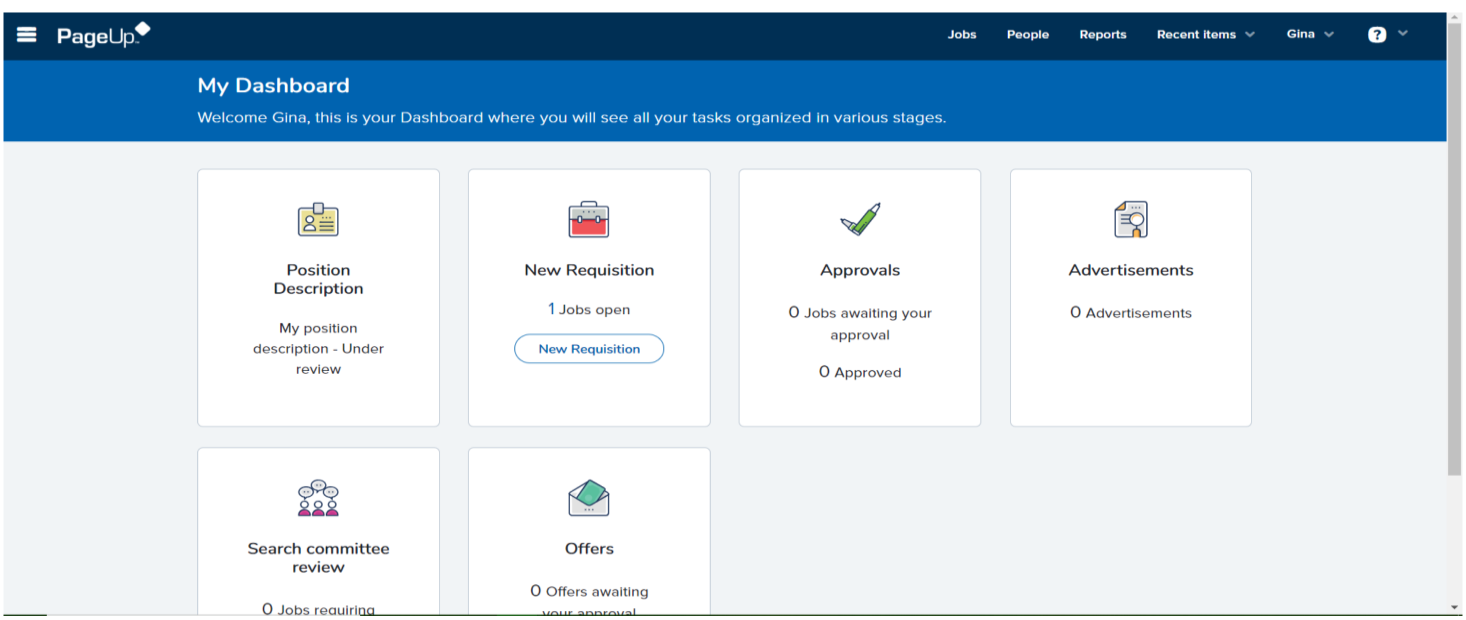
University of Massachusetts

Approving a job

Users will receive an email notifying them to review and approve/decline a job. This 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 approve the **Requisition**. **DO NOT FORWARD APPROVAL EMAILS TO OTHER USERS.**



You can access these jobs by clicking the **Approvals** tile on your dashboard. The number of positions to approve will be included there and you will click **View** to see the job you are approving and review the details.



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.

If you scroll down to the bottom of the position information tab of the requisition, you will see approve and decline buttons. You will see your name as well as the names of the remaining approvers. Click **Approve**.

Declining a job

Scroll down to the bottom of the position information tab of the requisition, 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 cancelling and restarting the approval process. Fill this in and select a new approval process.

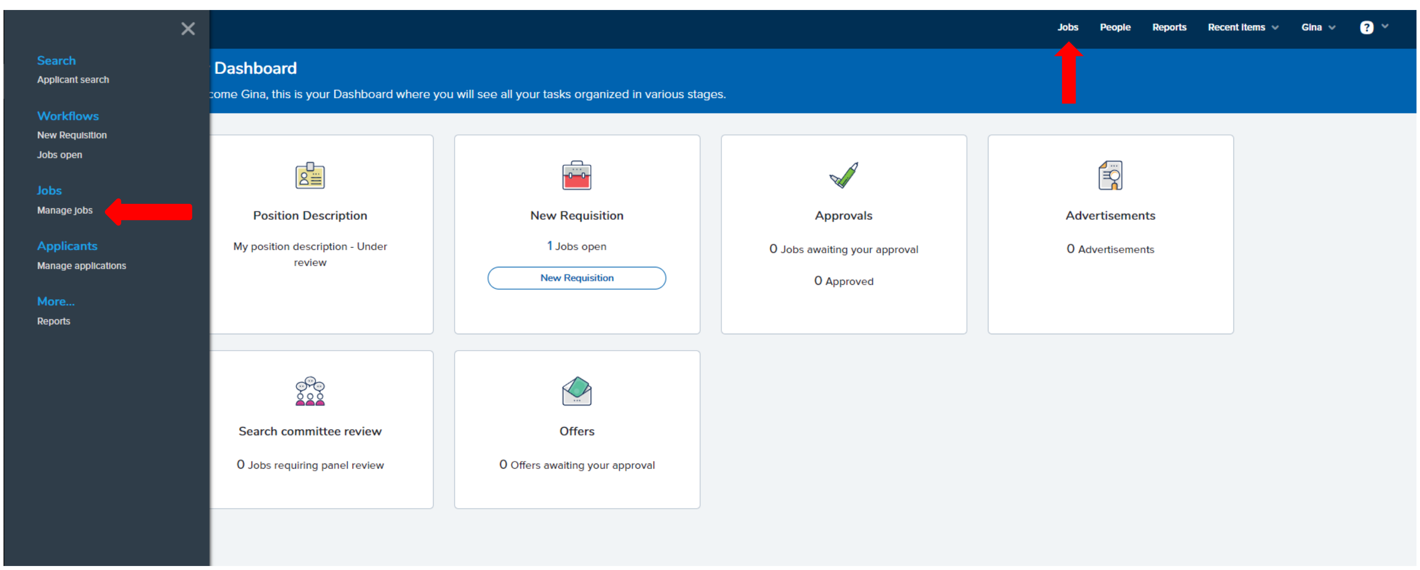
Assigning a different approver

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.

Job Requisitions – Searching and Managing

Searching for jobs via manage jobs

Select **Manage jobs** in the left side dropdown menu or select **Jobs** from the top left of the screen to view and search for jobs in the system (both open and closed jobs). Access to jobs from this area is based on your permission and team settings (e.g., some users can only see their jobs; others can see team member jobs, etc).



Please note that you will only see jobs in which you have been assigned to as a Hiring Manager or Administrative Support/Originator, or Search Committee.

Sorting jobs

Click column headings on the **Manage jobs** screen to sort on the column you have selected.

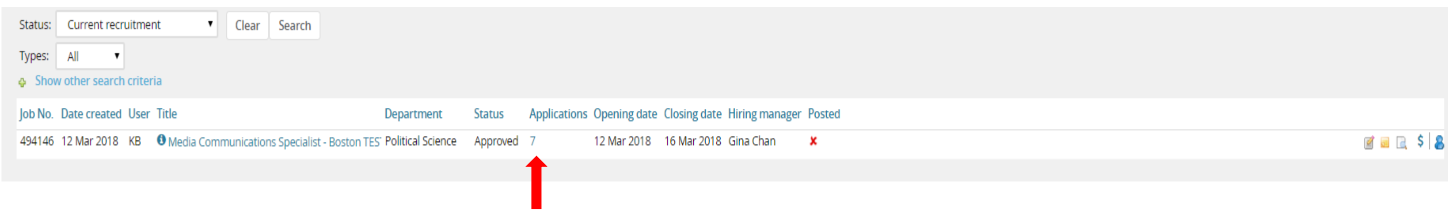
Manage Applicants

Navigating to the applicants

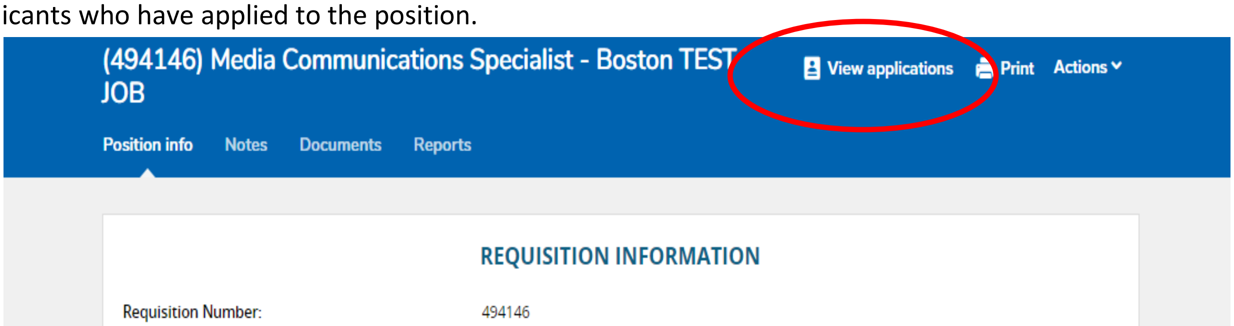
Depending on the role you have in the recruitment process, you will have access to review applicants to the positions you are recruiting.

To navigate to the applicants, there are several options.

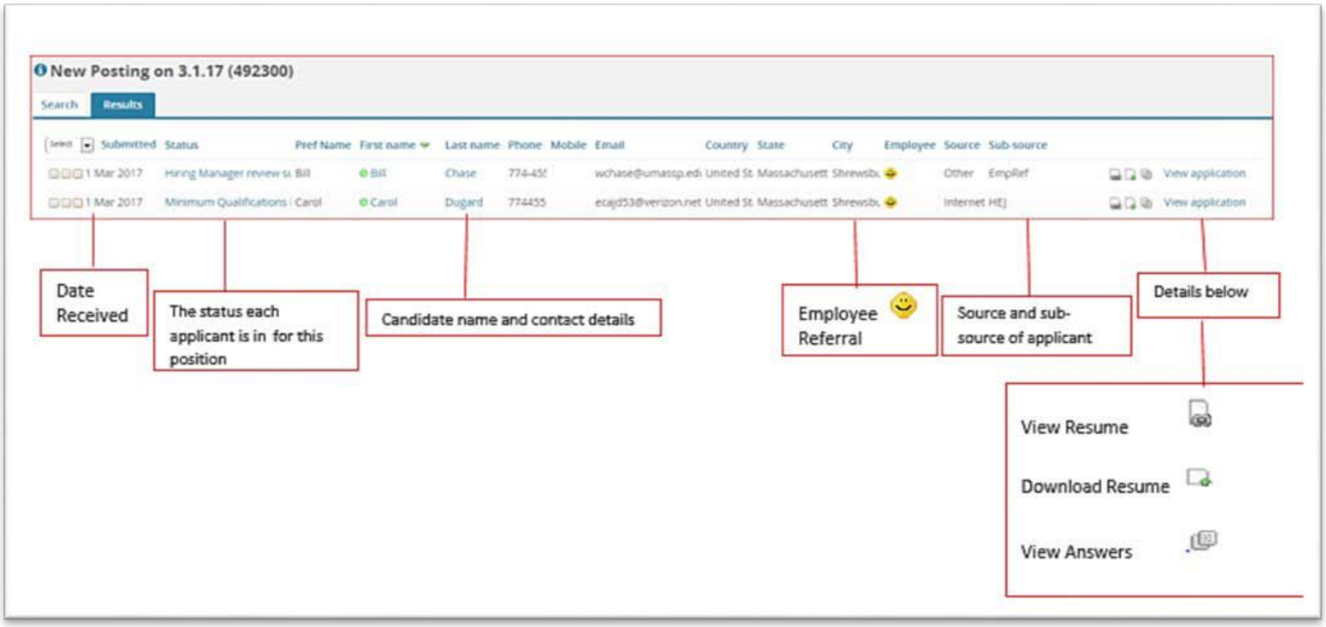
Once open to the job list, the number of applications is displayed and can be selected.



Click on **Title** to be directed to the Requisition Information page. Next, click on **View applications** to be directed to the applicants who have applied to the position.



The applicants will display in the following format. Columns contain pertinent information.



Viewing an applicant's resume and application form

On the same line as the applicants name, on the far right you will see three icons and the words View application.

- If you click **View Resume** this will open the resume in HTML.
- Clicking on **Download Resume** will download the resume in the format is was uploaded.
- Click on **View Answers** to view the application form answers.
- Clicking on **View application** will open the applicant card to view all the applicants' details.

Viewing an applicant card

Hiring Managers have access to view the applicant card which includes the applicant's personal details, job application information, previous history and communications, resumes and application forms, etc. Choose an applicant in the system. Search for them via **Manage applications** in the left side menu. Search by your job and view your applicant. Click **View Application** to see the applicant card.

The **Applicant card** (under **Applications)** contains the **Position** being reviewed, the **status** of the applicant, **offer status,** and any additional **Actions**. **Actions** may be accessed with the down arrow.

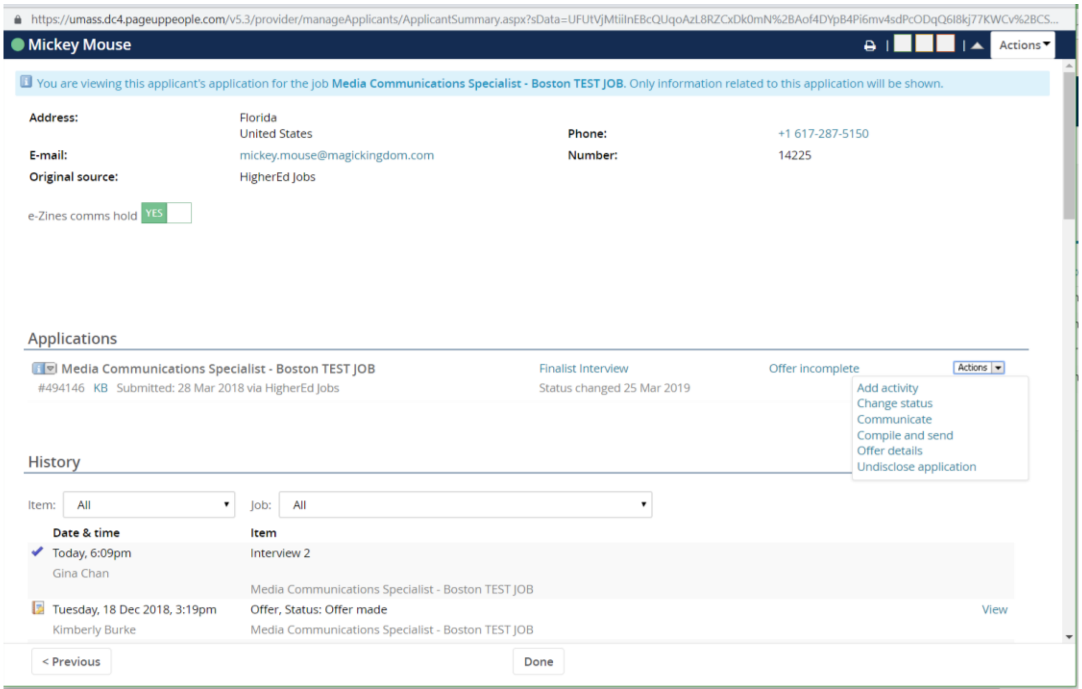
The **Status** lets the reviewer know where in the recruitment process an applicant stands. This may include interviews in process, designation of the success or rejection of an applicant, and recommendation for hire.

From the **Actions** drop down menu, action can be initiated to impact the applicant. However, it is best practice to review all applicants prior to taking any specific action. **Bulk actions** will be explained in the next step.

Applicant history section

On the applicant card, there is a section called **Applicant History** where you can view the history of an applicant and filter by **item** (e.g. documents, communications, notes) and/or by **job** (e.g. you can view ALL documents attached to an applicant or filter by job and view documents only for a particular job).

Changing the Applicant Status

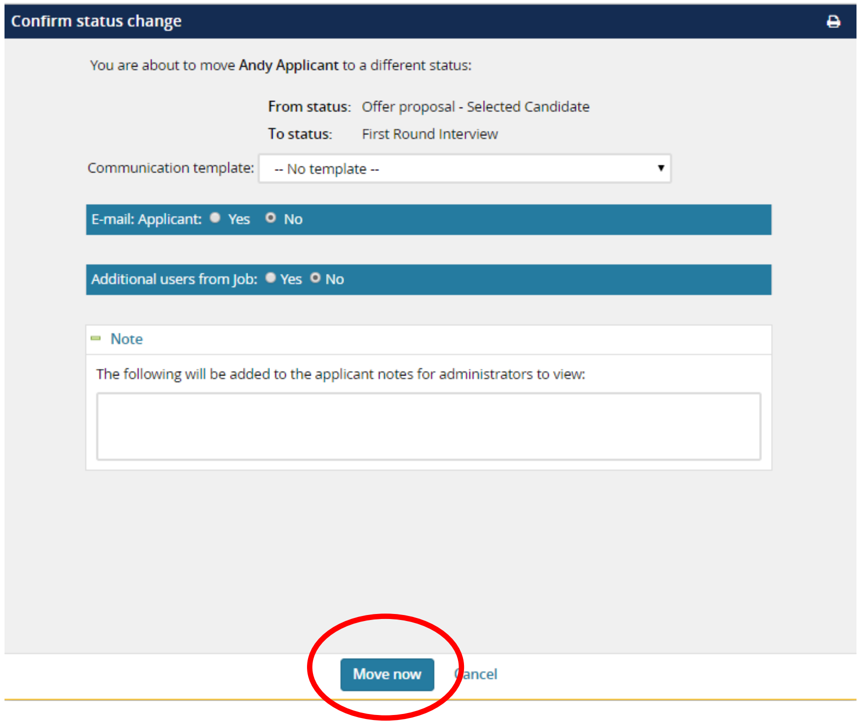


Hiring Managers are permissioned to change the **Status** of an applicant. This is a critical point in the applicant review process, since a **Status** change may trigger other actions within the PageUp system. A status change can also happen when viewing all applicants on the Manage Applicants Page.

Permissioned users should only move applicants when the Search Committee has finalized their review and/or the candidates approved by Human Resources (or Provost Office if a Faculty search). **Applicants should not bounce through different statuses.**

Once you make the selection and click on Next, you are taken to the Confirm status change screen. Near the bottom of the page, you will see the Status which the person has been moved to.
Once you have made the appropriate selection, click **Move Now.**

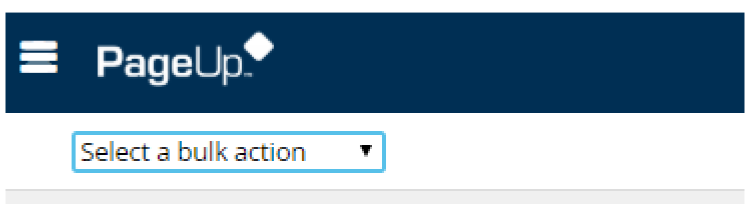
Human Resources will notify applicants not selected for interview. Once applicants are notified, hiring departments will no longer have access to those candidates.

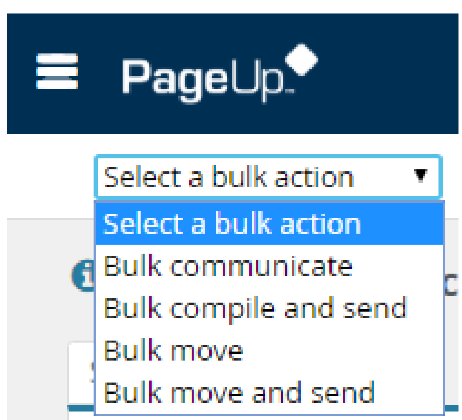


Additionally, **Hiring Managers** have the ability to send customized or template emails to the applicant, indicating their status during the process.

Managing applications - Bulk activities

Note: Bulk activities can be used throughout your recruitment process to process multiple applicants at the same time. **Certain actions may not pertain to all users.**





Bulk communicate

From **Manage applicants,** select a number of applications and click on **Bulk communicate** in the top toolbar. Choose the correct communication template to preview the template and click **next** when ready. From this next page, you can make updates to the template if required before clicking **send**. You can also export the person out to an excel file to perform a mail merge. If this has been selected, an excel document will open. A yellow information bar will confirm the action. To verify, open an applicant card and verify the communication was sent via the applicant history area.

Bulk compile and send

From **Manage applicants,** select a number of applications and click on **Bulk compile and send** in the top toolbar. Check Application form as the application document you wish to print and click on **Create PDF**. When the process is complete and the Download document dialogue is displayed, complete the user details you would like to send the documents to and click **OK.** Then click on the **Done** button to return to **Manage applications**.

Bulk move

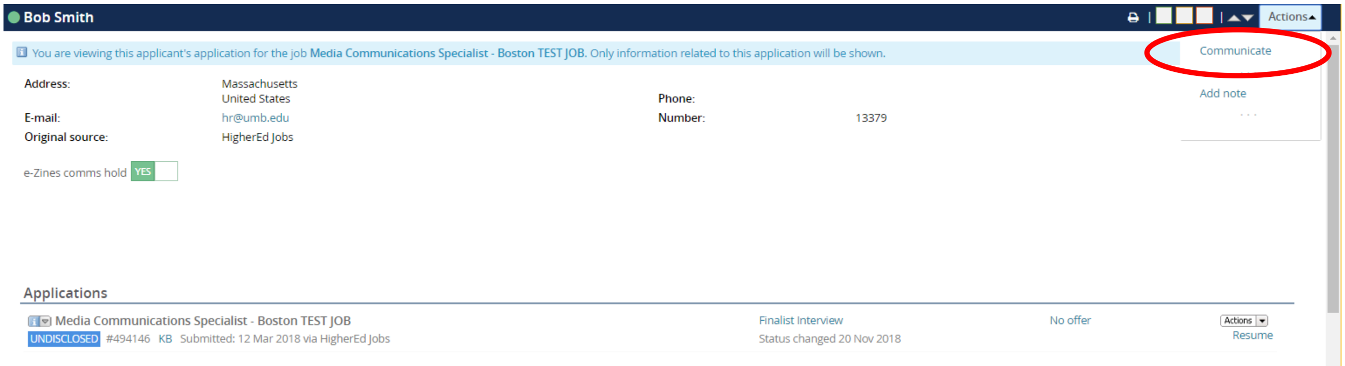
From **Manage applicants,** select a number of applications and click on **Bulk move** in the top toolbar. Choose the applicant status you wish to move the applicants to. You have the option of communicating with the applicants at this point if you wish as well as assign to a talent pool and make a note. Click **move now**.

Bulk move and send

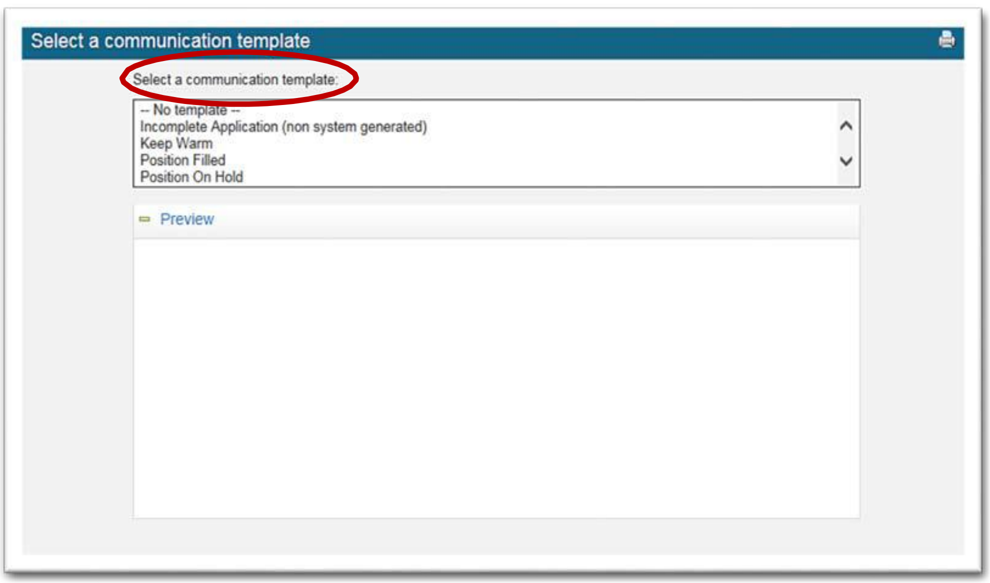
From **Manage applicants,** select a number of applications and click on **Bulk move and send** in the top toolbar. Select the information you wish to send to a user. Once you click **next**, the user will receive an email with URL's containing the details you have compiled. The next page will perform a standard bulk move.

Communicating with candidates

Hiring Manager permissions can select the **Actions** toolbar and then select **Communicate**.



Then you may select a communication template. If you wish to communicate with the applicant / candidate free form, select **No template**.

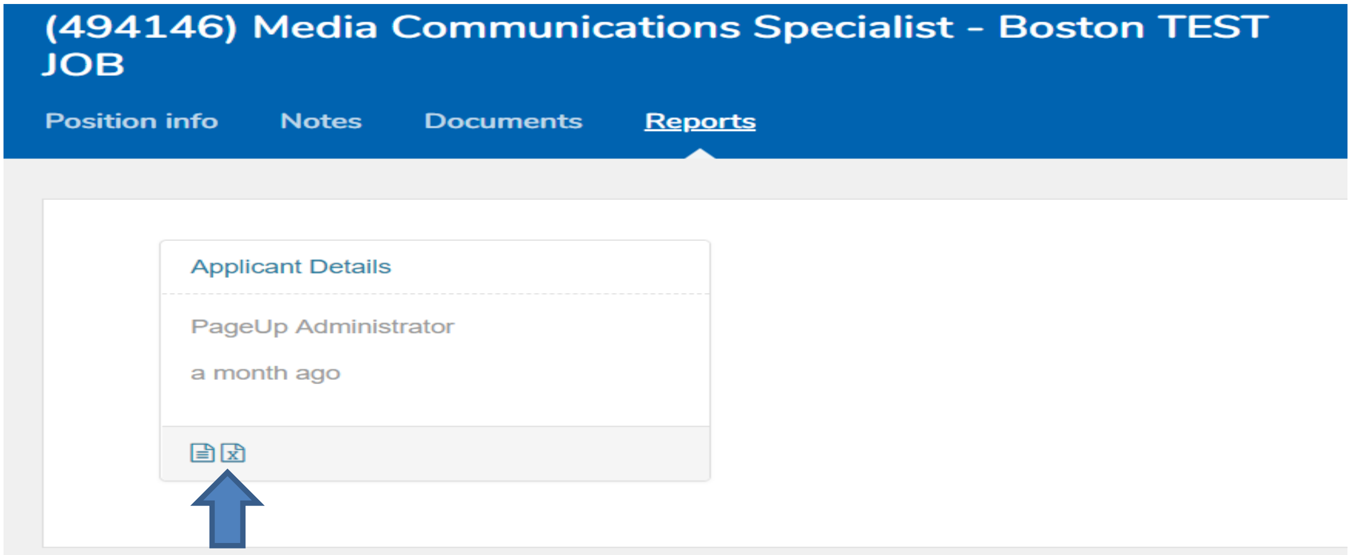


Submission of candidates selected for interview

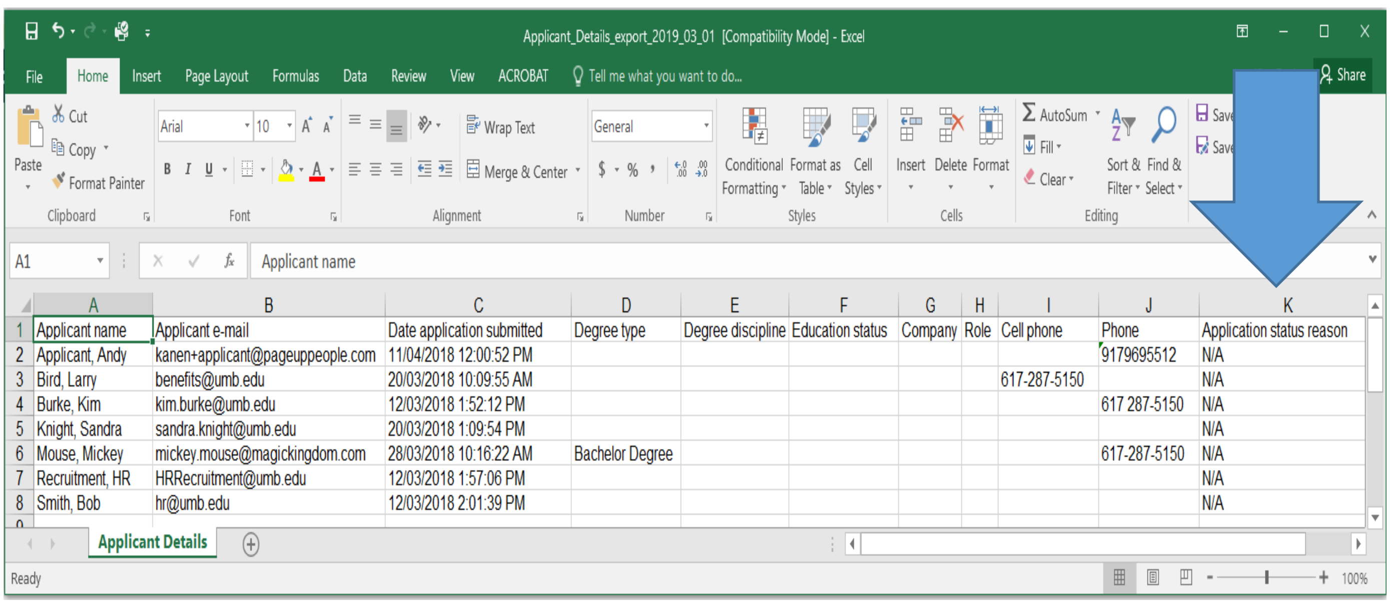
Hiring Managers will download the **Applicant Details** report following their review of candidates and indicate a disposition reason for each applicant under the **Application Status Reason** column. First round candidates will be indicated with "**First Round**", all other applicants will be indicated as "**Does not meet job requirements**" or "**Other candidates more suitable**."

Note: These are the only disposition reasons to be listed on the report.

The **Applicant Details** Report can be found on the Reports tab of the requisition.

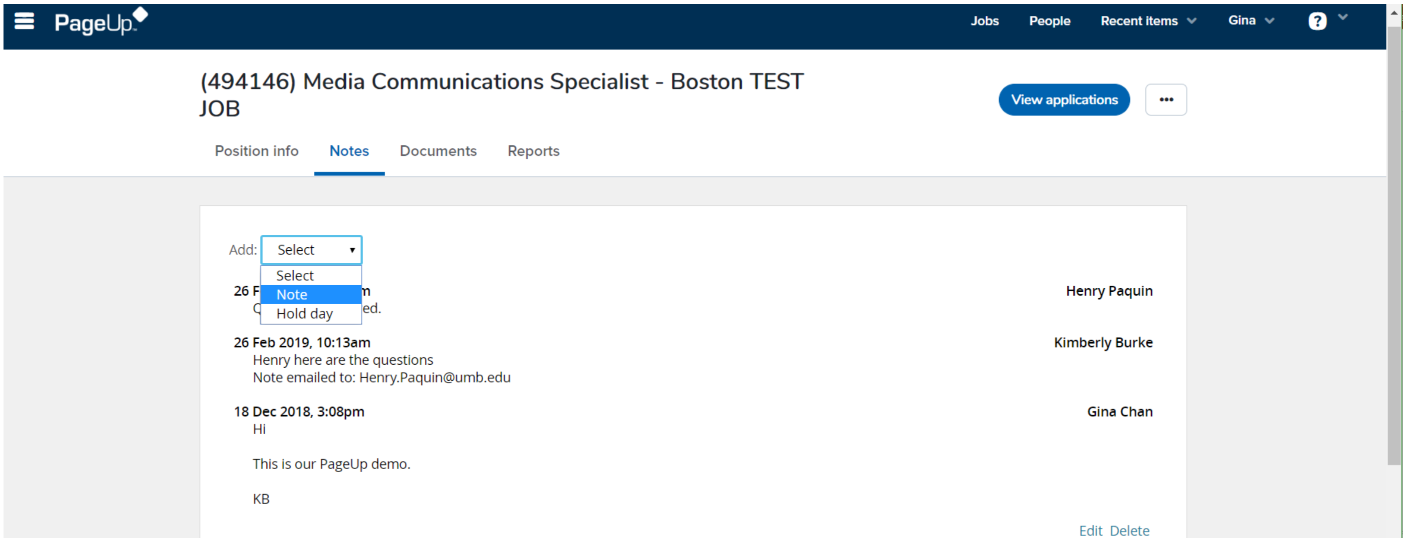


Disposition reasons will be added to the column below on the report, saved, and uploaded.

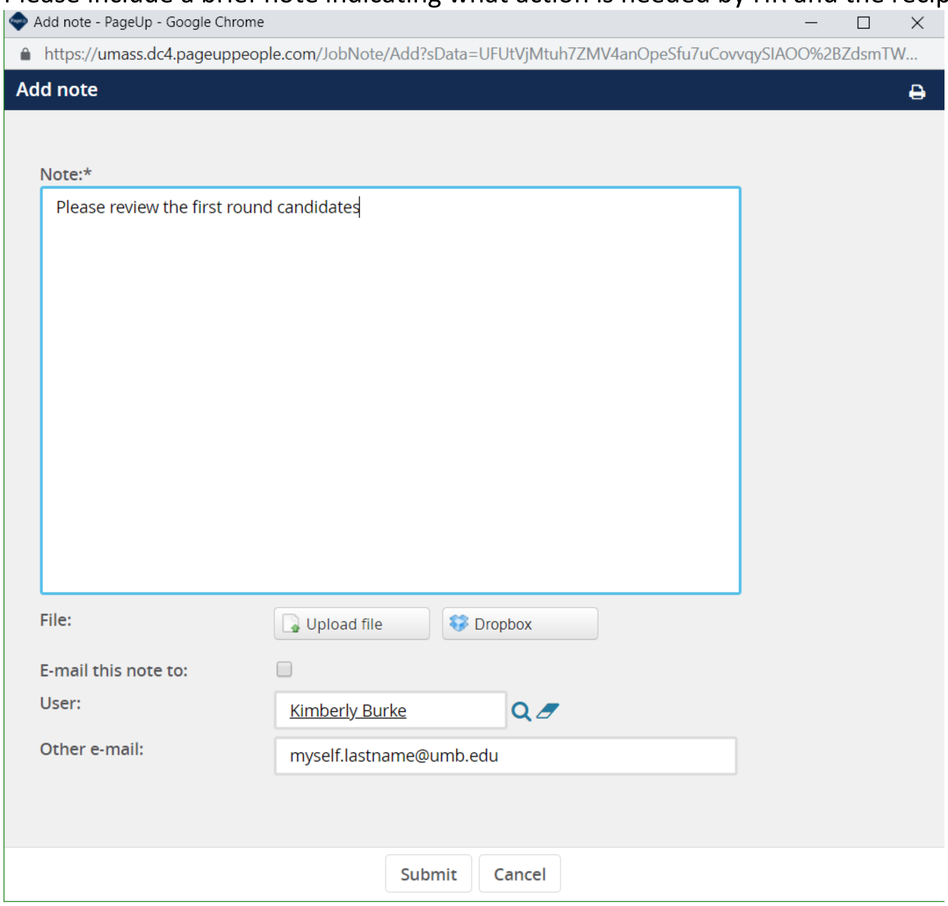


The completed report will be attached to the **Notes** tab for HR review of the first round candidates. Select your HR Recruitment contact to notify HR.

For faculty searches: The Applicant Details Report will be sent directly to the Provost's Office once candidates have been identified for interview and dispositions have been listed for each applicant. The Provost's Office will upload the spreadsheet to PageUp notes for HR Diversity review. HR will notify the academic department and the Provost's Office via the notes upon final approval.



Please include a brief note indicating what action is needed by HR and the recipient. An additional user can be selected.



The document will be available to HR and all users listed on the Requisition.

(494146) Media Communications Specialist - Boston TEST JOB

View applications

Position info | Notes | Documents | Reports

Add: Select

21 Mar 2019, 6:43pm

Gina Chan

This is a test.docx

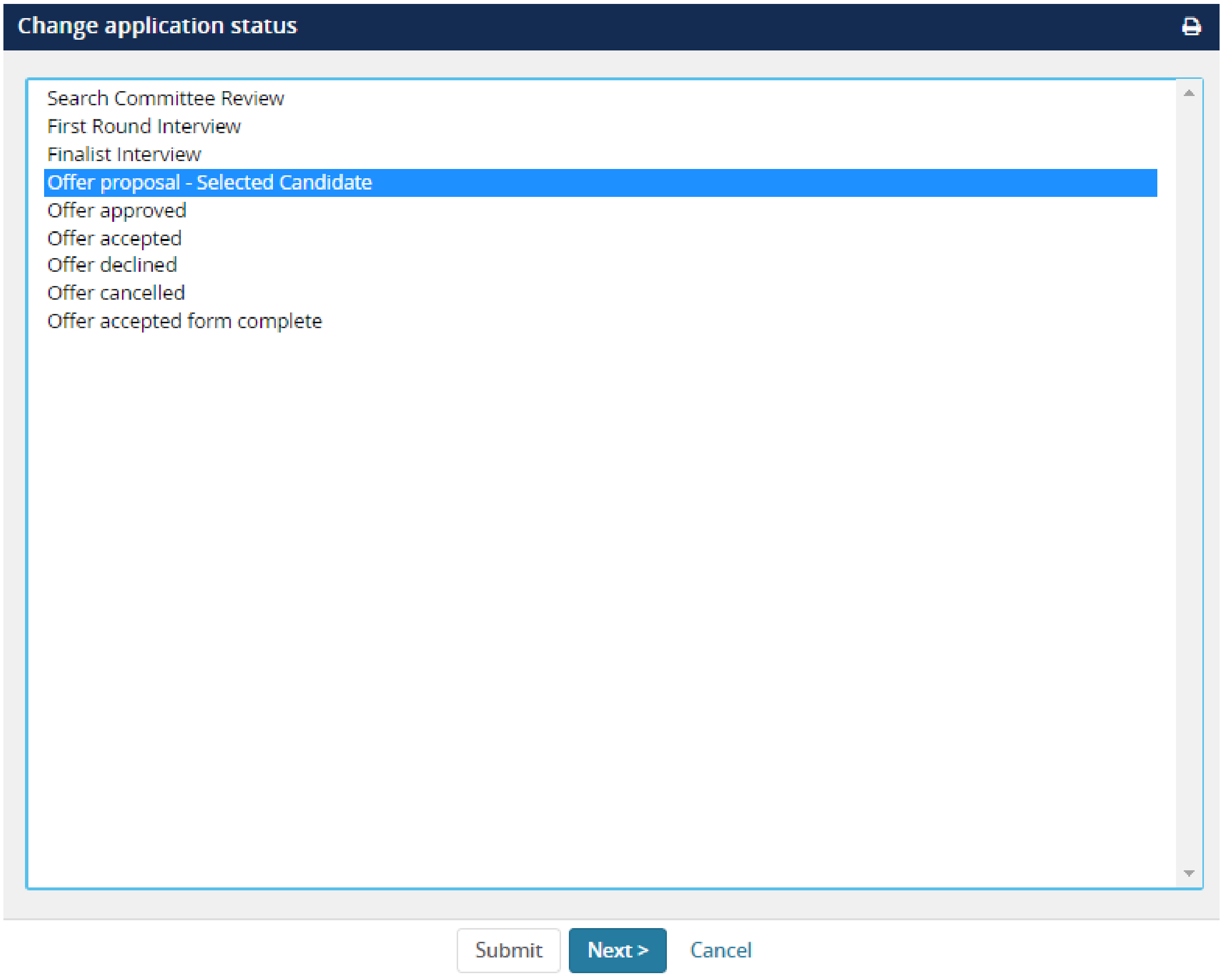
Please review the first round candidates

Edit Delete

Making an offer

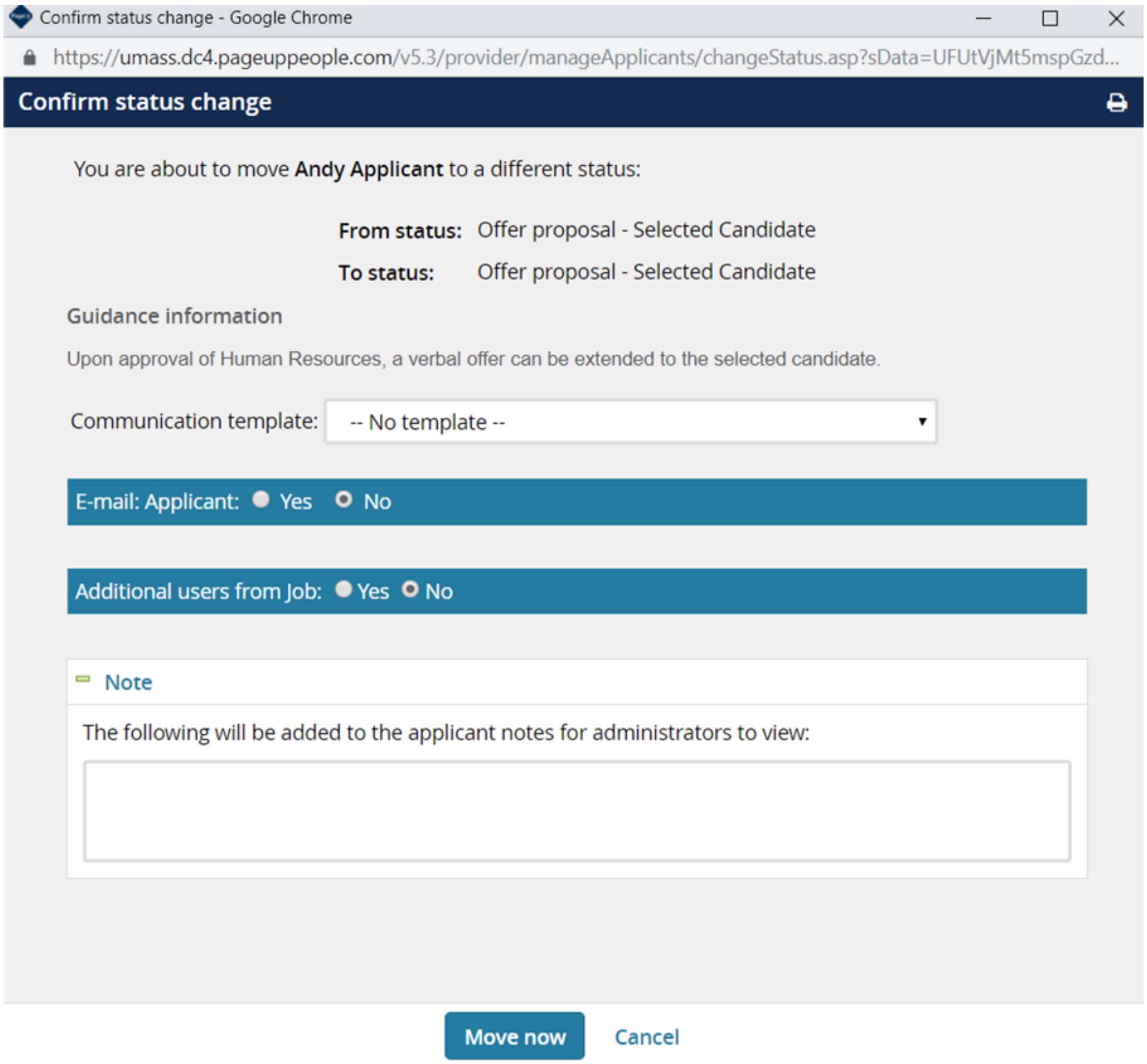
Application status move

Once you have interviewed your candidates and are ready to make a recommendation for hire, the **Hiring Manager** will be required to change the status of the applicant. First, open the requisition, and then select **View Application.** Click on the **Status** of the applicant you want to extend an offer to and change their status to **Offer Proposal-Selected Candidate.** Click next to continue.



Click **Yes** to update the **Job status** at the same time you are updating the applicant status.

Confirm Status Change:

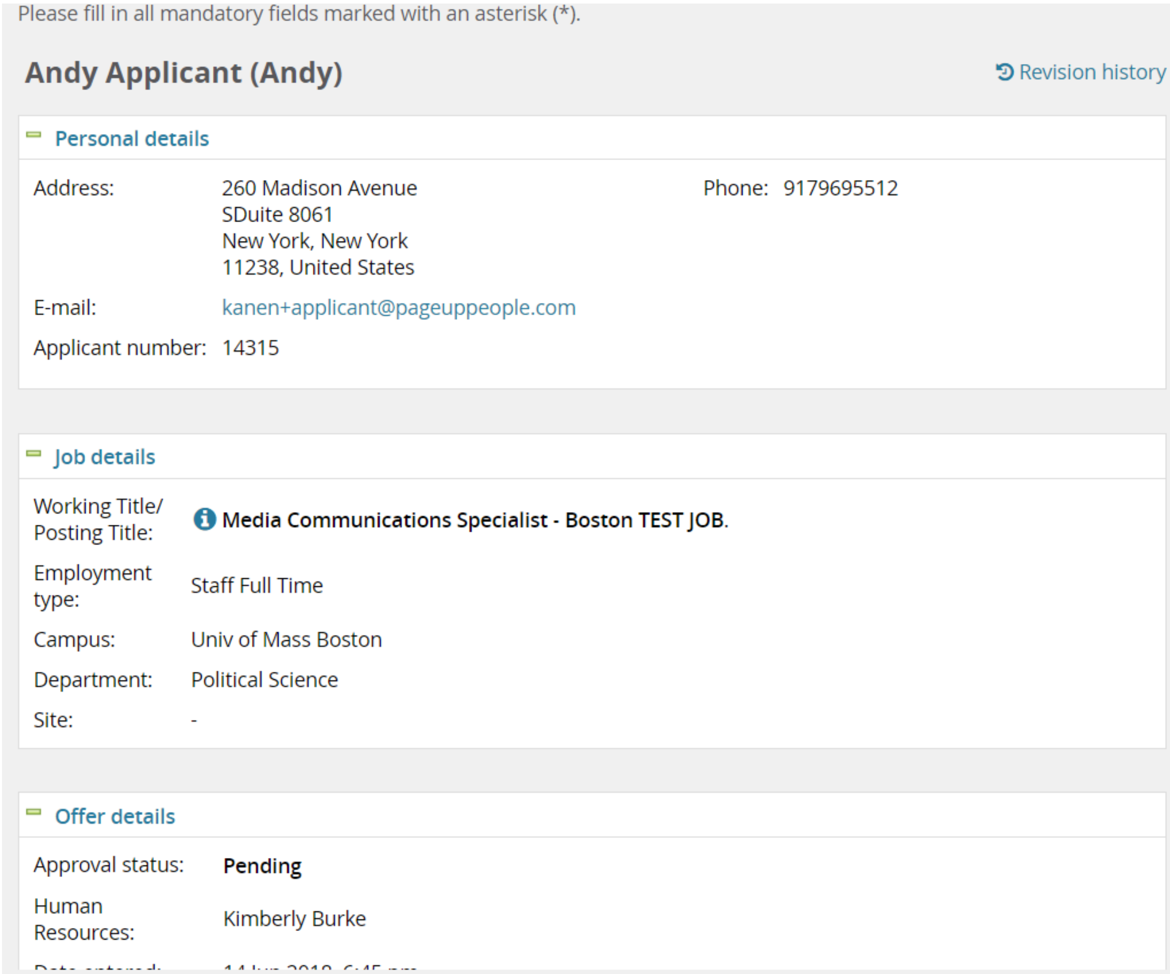


After clicking **Move Now** the **Offer card** (offer details page) will be displayed. **Do not elect to send an email to the Applicant.**

Fields from the **Requisition** and the **Applicant Card** will be pre-populate certain fields on the **Offer Card.** The initial display of the **Offer Card** pulls forward personal details, job details and offer details contained in the **PageUp** applicant tracking system.

In the Offer details section, you will see the **Position Number** and **Applicant's name.** In most situations, the Position number will already be marked for the individual. However, if there are several position numbers listed on the job requisition, you may need to change the position number to match the applicant. To do this, select the appropriate position number and proceed with the offer card.

Selected Candidate Offer Card:



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

Andy Applicant (Andy) Revision history

Personal details

Address:	260 Madison Avenue SDuite 8061 New York, New York 11238, United States	Phone:	9179695512
E-mail:	kanen+applicant@pageuppeople.com		
Applicant number:	14315		

Job details

Working Title/ Posting Title:	**Media Communications Specialist - Boston TEST JOB**.
Employment type:	Staff Full Time
Campus:	Univ of Mass Boston
Department:	Political Science
Site:	-

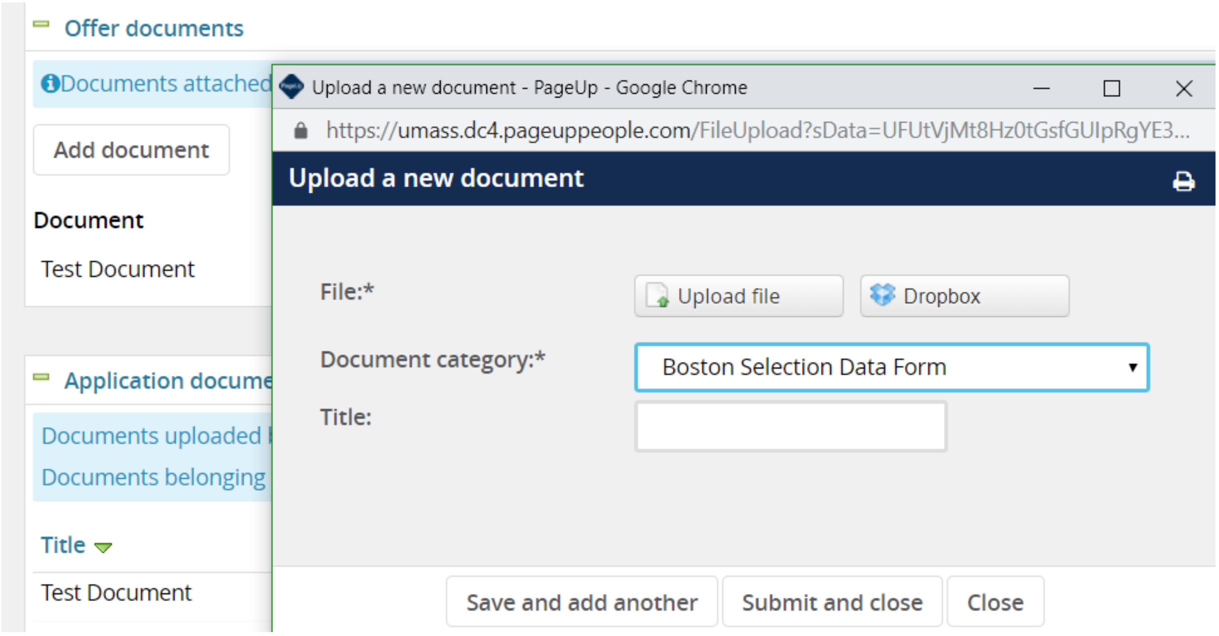
Offer details

Approval status:	**Pending**
Human Resources:	Kimberly Burke

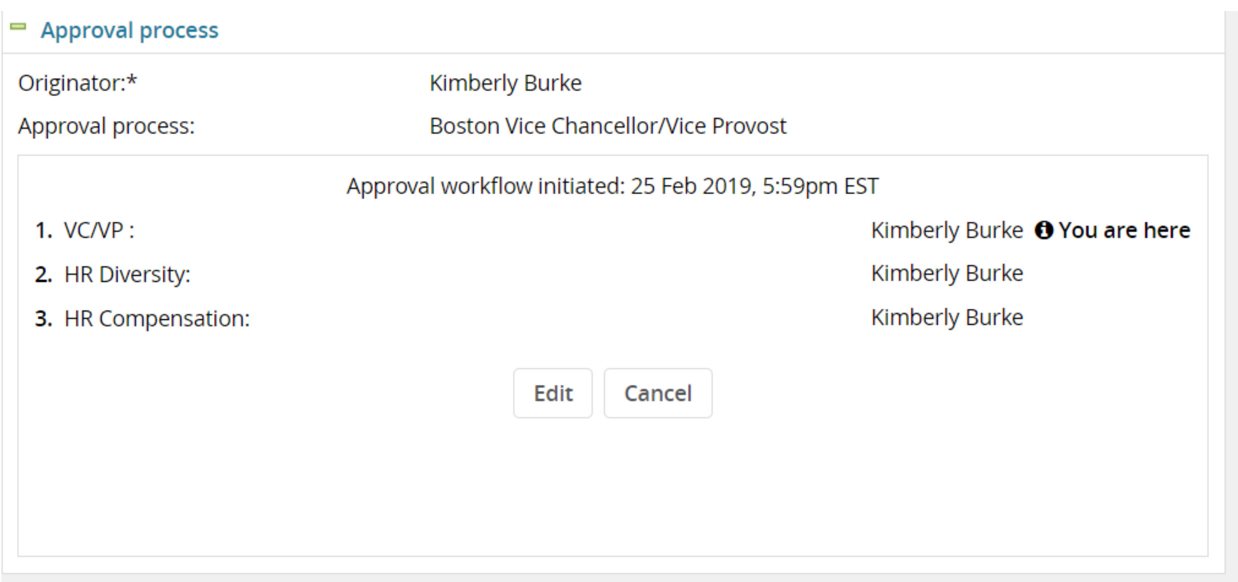
Complete offer details

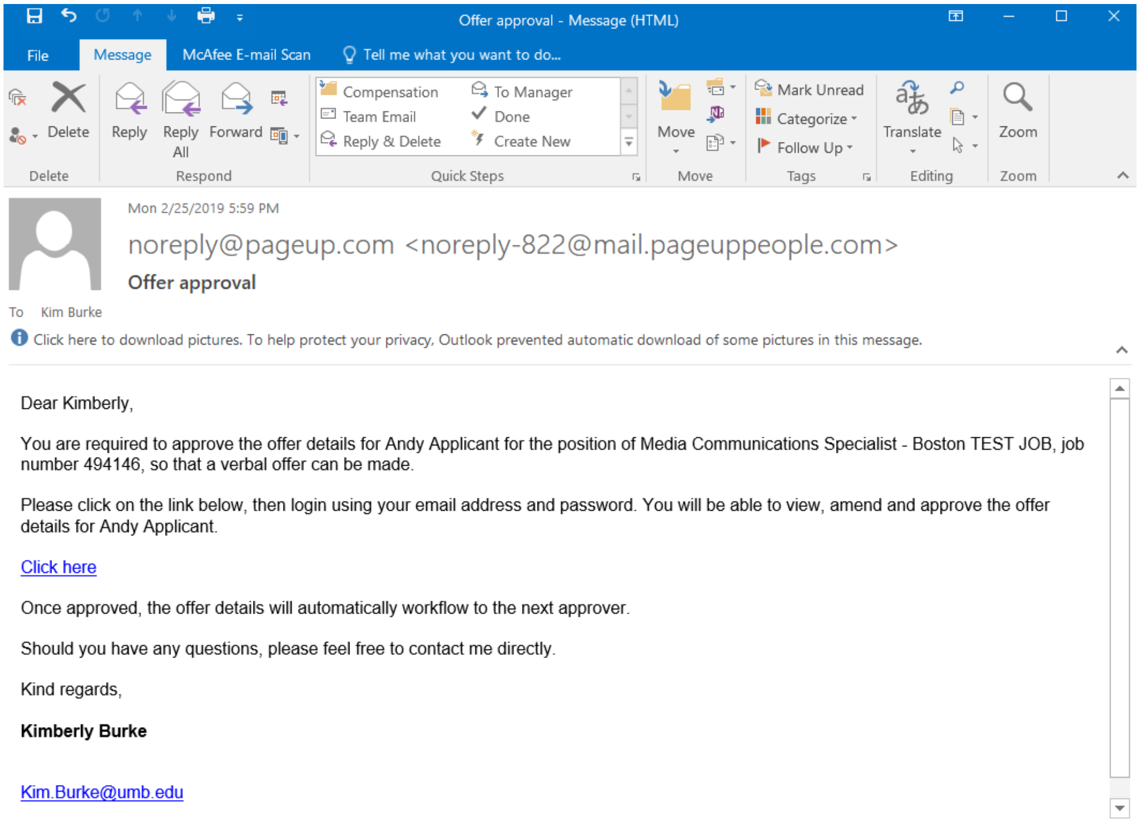
From the **Offer details** page, enter details into all fields ensuring all mandatory fields are completed. The proposed salary must be listed.

You must attach the Data Selection Form to the Offer Card indicating the finalists and their reasons for selection or non-selection.



You must then select an **Approval Process**. Enter the appropriate names, if names did not default, and then select **Submit and Close.** This will start the approval process. Human Resources is last in the approval workflow and will be responsible for sending the offer letter out to the candidate for staff searches. Hiring Managers will be notified via the system once the offer details are approved by Human Resources and a verbal offer can be extended.





Dear Kimberly,

You are required to approve the offer details for Andy Applicant for the position of Media Communications Specialist - Boston TEST JOB, job number 494146, so that a verbal offer can be made.

Please click on the link below, then login using your email address and password. You will be able to view, amend and approve the offer details for Andy Applicant.

Click here

Once approved, the offer details will automatically workflow to the next approver.

Should you have any questions, please feel free to contact me directly.

Kind regards,

Kimberly Burke

Kim.Burke@umb.edu

Approving offers

Approving an offer

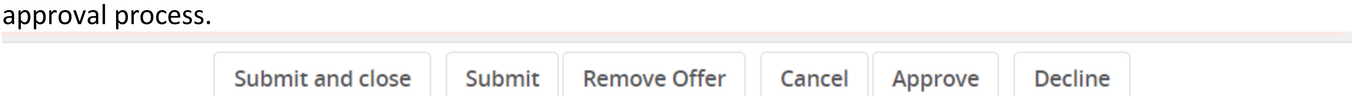
Click the **Offers** tile on the dashboard and click **View** next to the offer you are an approver for and review the details. If you scroll down to the bottom of the Offer Card you will see approve/decline buttons. You will also see your name listed as an approver as well as the names of the remaining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

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**.

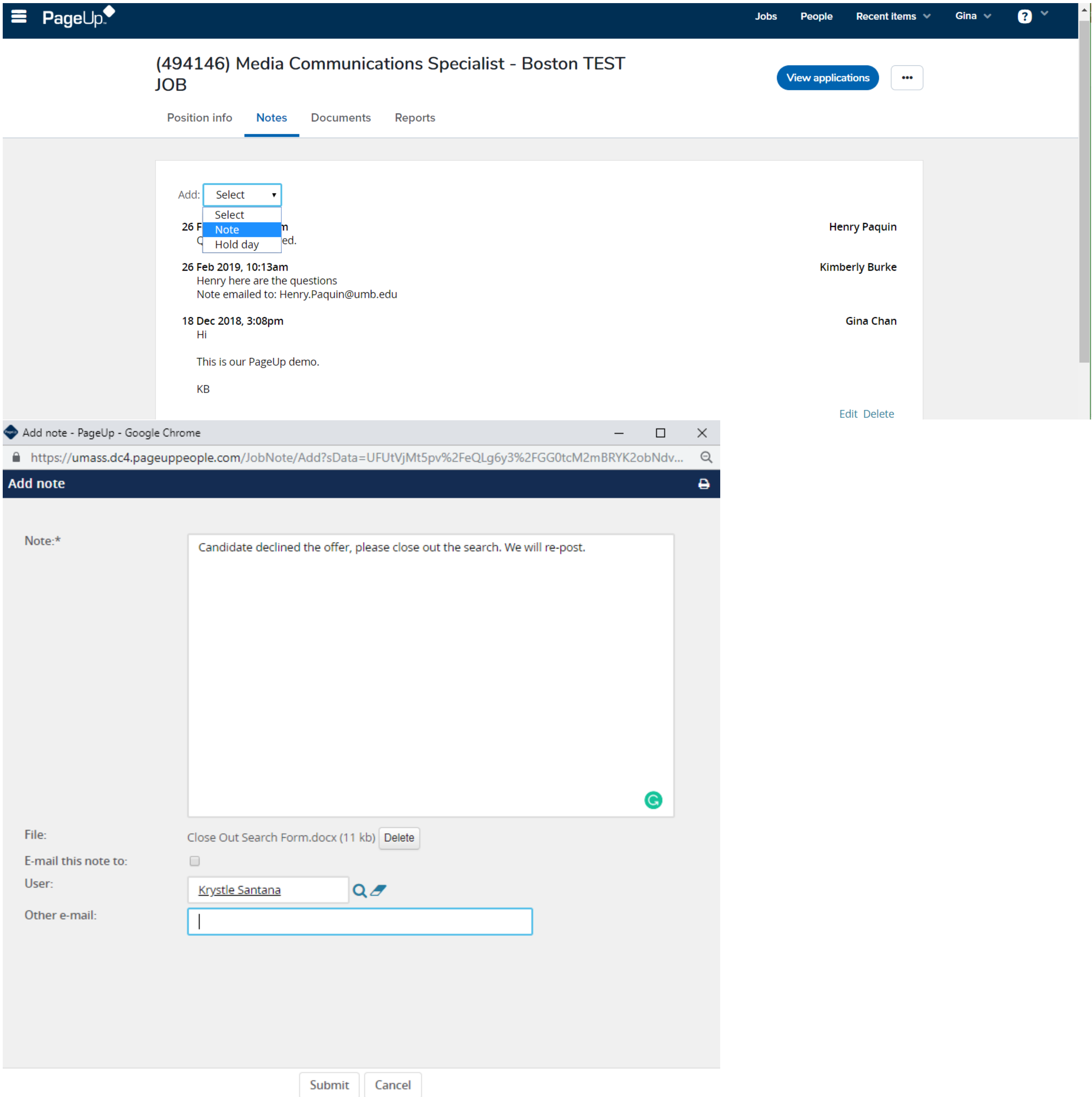
Restart an approval process

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



Closing out a Search

Under limited circumstances, a search can be closed out for lack of a viable candidate. To indicate that you would like to close out the search, add a Note to the requisition and upload the Close Out Search Form.



Key Terms and Roles within PageUp

Key Terms

- **Job Card:** PageUp form used to submit a requisition to recruit
- **Offer Card:** PageUp form used to select a candidate for an offer of employment.
- **Requisition:** Online request to post for a vacant, or soon to be vacant, position.
- **Approval Process:** The sequence of approvers needed to post a vacancy or select a candidate for an offer.
- **Application Status:** The different steps an applicant goes through during the recruitment process.
- **Applicant Card:** Individual application details and history (Hiring Manager and Vice Chancellor permissions).
- **Permission Groups:** Access level assigned to each user; HR assigns permissions in consultation with department needs.
- **Administrative Support/Originator:** Enters requisition on behalf of department/hiring manager; no access to applicants; optional.
- **Hiring Manager:** Will coordinate the full hiring process for the search, including submission of Offer Card, first round candidates, and interview questions; serves as point of contact with HR.
- **Search Committee and Search Chair:** Reviews all applicants and makes recommendations for first round interviews.
- **Vice Chancellors:** Can view all requisitions and applicants within assigned "Teams"; can also submit an Offer Card for selected candidate

Requisition field roles

Hiring Manager (required field):

- On the requisition, this field will always default to the person who is creating the requisition. If the individual creating the requisition is not a true hiring manager for this position, you should replace the name.
- Responsible for day-to-day applicant and search management on a requisition that they are assigned to.
- Most powerful role with most visibility on requisitions. Has the ability to create and submit a requisition, move applicants into the correct application statuses throughout the hiring process. Will see all requisition statuses (open, filled, draft, approved etc). Is able to communicate to applicants via PageUp.
- Can view jobs assigned to them by selecting the jobs link at the top of their dashboard. Can view approvals of the Requisition throughout the job approval process.
- If no search committee, will submit Applicant Details Report of applicant pool via PageUp Notes.
- Only one Hiring Manager can be assigned to a Requisition.

Administrative Support/Originator (optional field):

- Individual who is completing the Requisition on behalf of hiring department.
- Will attach approved job description and compensation memo to requisition.
- No access to applicants.
- Will see status of the requisition through approval.

Search Committee Chair (optional field):

- Someone who will oversee the applicant review process.
- Only able to see jobs that they are assigned to.

- Search Chair is able to view applicant documents.
- Will be able to view search committee members' feedback.
- Should oversee search committee meetings and make recommendations to Hiring Manager. Will submit Applicant Details Report of applicant pool via PageUp Notes.
- Search Chair may be the Hiring Manager.
- Able to view the original requisition, but cannot edit it.
- Responsible for working with the Hiring manager, Administrative Support/Originator to move an applicant into the correct disposition status.

Search Committee Member (optional field):

- Can view applicants and is able to evaluate an applicant based on the selection criteria. Unable to comment on an applicant.
- Only able to see jobs that they are assigned to.
- Able to view the original requisition, but cannot edit it.

Other PageUp Roles

Vice Chancellor/Vice Provost:

- Senior administrators will have access to job requisitions and applicants for multiple Teams (departments) within their division.
- Access to applicants similar to Hiring Manager. Has ability to change application statuses and initiate or approve an Offer Card.
- Can approve a requisition.

OBFP:

- Office of Budget and Financial Planning access to review and approve requisitions.
- No Access to applicants

Offer Card field roles

Reports to Manager (required field by HR):

Who this individual will report to. Will receive notices (future rollouts) in relation to onboarding responsibilities and provisioning.

Originator (required field):

Individual completing the Offer Card, typically the Hiring Manager.