Appointing Unpaid Visiting Scholars via Courtesy Express

This guide will detail the steps to appoint Unpaid Visiting Scholar candidates via Courtesy Express in OMNI HR. Collaborating and connecting with a diverse group of scholars is vital to advancing the research and education missions of the University. Visiting Scholars may come to Florida State University at the invitation of an FSU faculty or staff member working in their field.

Visiting Scholars work collaboratively with faculty or staff members in areas of research and creative activity. These activities should:

- Be of mutual benefit to the scholar and FSU
- Keep faculty abreast of worldwide innovations
- Build linkages for further research collaboration
- Enhance the reach and recognition of the University and its programs
- Expose FSU students to other cultures and different approaches to common challenges

Each semester, the Office of Human Resources creates a non-advertised job opening for use by the entire University, known as theCourtesy Express. This process is used when the Unpaid Visiting Scholar process has been completed offline and the department has identified a Courtesy appointment. The Courtesy Express job opening will display for departments in the Recruiting > Search Job Openings list, but it is not advertised as a job for which applicants can apply. The department creates the applicant record, links the record to the current Courtesy Express pool, and prepares the job offer.

Key Information:

- Required Roles: FSU_SS_MANAGER and FSU_GRAD_EX_PILOT
- OMNI Recruiting Training Guides
- Courtesy SupplementalDocs
- Courtesy Job Codes
- J-1 Visas
- Unpaid Visiting Scholar Process
- Unpaid Visiting Scholar Policy
Unpaid Visiting Scholar and J-1 Visa

**STEP 1:** Complete all of the appropriate paperwork for the [Unpaid Visiting Scholar Process](#).

**STEP 2:** If necessary, complete any and all [J-1 application](#) documents and send them to the Center for Global Engagement.

**NOTE:** Do not submit a job offer until all requirements for the Unpaid Visiting Scholar Process and J-1 application have been completed and approved.

Appointing the Visiting Scholar via Courtesy Express

**STEP 3:** Click the [Recruiting](#) tile.
Creating the Applicant ID

**STEP 4:** Click Add Express Appointment.

**STEP 5:** On the Express Appt page, enter the candidate’s name and click Add Email Address. Indicate email type, enter a valid email address, and click Save or Save and Create Another to add additional records.

**Note:** The email address provided is where the Smart Onboarding invitation will be sent later in the process; it is important that the information entered is correct.

Use the drop-down menu to select the email type. For email type, please only use “Other” or “Home” – selecting a “Campus” or “Business” email type will result in the candidate not receiving the “Activate your FSUID” email.
STEP 6: Note the Applicant ID
Linking the Record to the Courtesy Express Pool

STEP 7: Navigate to Recruiting > Search Applicants > enter the applicant ID in the Applicant ID field > click Search.

STEP 8: Across from the candidate’s name, use the Actions drop-down menu to select Link Applicant to Job.

STEP 9: Enter or select the correct semester’s Courtesy Express job ID in the Job Opening ID field > click Link.
Preparing the Job Offer

**STEP 10:** After the applicant’s record has been successfully linked, click on the candidate's name to be redirected to the job opening(s) associated with the applicant’s ID.

**STEP 11:** Under the appropriate Job Opening, click on **Other Actions**.
STEP 12: Click Recruiting Actions > Prepare/View Job Offer.

STEP 13: Begin on the Offer Details tab.

STEP 14: Navigate to the Comments section. Enter information pertaining to the candidate and/or job offer, such as employee ID, type of appointment (new, rehire, additional appointment), description of duties, and that the appointment is an Unpaid Visiting Scholar. If the appointment is a Post Doc, please include financial support information including the source and amount of funding.

The Post Doc job code is only appropriate if it meets the minimum requirement for salary per the Office of Postdoctoral Affairs. Courtesy Post Docs are paid through an external grant or their home university.
**STEP 15:** Navigate to the FSU Offer – Additional Info section. Enter the appropriate **Job Code** or click the look up button to select the appropriateCourtesy Job Code. To determine the appropriateCourtesy job code, review the information [here](#).

**Note:** The default code COUX is not a valid job code.

---

**STEP 16:** Enter the appropriate **Department** or use the lookup button to search and select the desired Department.
**STEP 17:** Enter the appropriate **Location Code** or use the lookup button to search and select the desired Location Code.

**STEP 18:** Enter the appropriate **Supervisor ID** or use the lookup icon to search for the desired Supervisor ID.
**STEP 19:** Enter the appropriate **Mail Code** or use the lookup icon to search for the desired Mail Code.

![FSU Offer - Additional Info](image)

**STEP 20:** Click the **U.S. Citizen?** drop-down menu. Select the appropriate answer from the list.

![FSU Offer - Additional Info](image)
STEP 21: Click the **Empl Class** drop-down menu. Select the appropriate classification. "Vstg Schlr" should be used for Unpaid Visiting Scholars.

STEP 22: Enter the appropriate weekly standard hours. Most visiting scholar appointments will have a 0.01 standard hours entry.
STEP 23: The Pre-Mgr Approver field is optional. Use the lookup button to search and select a Pre-Mgr Approver, if desired. The Originator Telephone will automatically populate.

STEP 24: Enter the Begin Date.

Note: The Begin Date typically matches the start date on the DS2019, however, Visiting Scholars are permitted to start 30 days prior to the J-1 start date.

STEP 25: Save the Job Offer by clicking the Save as a Draft button. This will allow you to attach approval documents.
STEP 26: Click the **Edit Offer** button. Attach the approved **Request to Invite** form by clicking the “Approval Attachments” button and uploading the document.

**Offer Attachments**

No attachments have been added to this offer.

Step 27: Attach the approved Request to Invite form by clicking the **Approval Attachments** button and uploading the document.
NOTE: The completed and signed Visiting Scholar Agreement will be required for processing. Please upload this document into the supplemental documents step in Onboarding.

**STEP 29:** Click the Background Check tab.

Enter a Description of Duties for the appointment. Confirm the Budget Manager and Budget Manager Email is correct.

Enter or look up a valid Purchase Order # or enter a valid Foundation Fund # to pay for the background check. The Line # will generate based on purchase order selected.

NOTE: The department will only be charged if a background check is required.
**STEP 30:** Answer each question on the **Background Check Questionnaire**; No or Yes as applicable. Confirm these answers with the hiring supervisor.

Once the questions are answered, the background check level will generate at the bottom of the questionnaire.

The background check level will be reviewed by Human Resources Background Check staff.

### Part 1: Outside Documents to replace/satisfy FSU Background Check:

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Is this job role located in the FSU Childcare Center?</td>
</tr>
<tr>
<td>2</td>
<td>Does this job role require a specific background check to be performed for which approved external agencies complete screenings? (e.g., DRS positions, positions in the K-12 school system, etc.)</td>
</tr>
<tr>
<td>3</td>
<td>If the hiring department for this job role has been granted approval by the Office of Human Resources to perform a specific background check for all employees, select the appropriate level. If not applicable, select &quot;NO.&quot;</td>
</tr>
<tr>
<td>4</td>
<td>Will this person be working or volunteering with a University Sponsored Summer Camp held between May and September?</td>
</tr>
</tbody>
</table>

### Part 2: Level 2 Background Check Required Duties:

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Will this person be providing care, treatment, education, training, instruction, supervision, or recreation to vulnerable populations such as minors, the elderly, or those with disabilities?</td>
</tr>
<tr>
<td>2</td>
<td>Is the position classified as Vice President level or above by job code/administrative code?</td>
</tr>
<tr>
<td>3</td>
<td>Is the position with the FSU Public Safety or Panama City Campus Public Safety? If yes, submit a copy of the fingerprint report obtained by FSUPD: HR will conduct the Standard portion of the Criminal History Background Check</td>
</tr>
<tr>
<td>4</td>
<td>Is fingerprinting a requirement by granting agencies for grants and contracts?</td>
</tr>
<tr>
<td>5</td>
<td>Will this person be working or volunteering with regulated materials regardless of quantity [DHS Chemicals of Interest, DEA controlled substances, NRC Radioactive Material] or is the position located in a facility covered by a DOT Security Plan, or has unescorted access to said materials?</td>
</tr>
</tbody>
</table>

### Part 3: Standard Background Check Required Duties:

<p>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Will this person perform fiscal duties to include budgeting, accounting, or having direct access to cash (except petty cash), checks, and/or credit/debit cards to include making and/or receiving payments?</td>
</tr>
<tr>
<td>2</td>
<td>Will this person possess system access that provides the ability to process payments, print or distribute checks, process corrections, or generate, update, or approve financial transactions that will result in the disbursement of University funds?</td>
</tr>
<tr>
<td>3</td>
<td>Will this person have control over University-wide operational processes through functional roles or system security access?</td>
</tr>
<tr>
<td>4</td>
<td>Will this person have access to sensitive, secure, and/or confidential personal information on individuals, such as students, faculty, staff, or alumni (e.g., social security numbers, dates of birth, etc.)?</td>
</tr>
<tr>
<td>5</td>
<td>Will this person possess access to surplus property inventory, or possess a grand master or building master key and/or cards for building access?</td>
</tr>
</tbody>
</table>
STEP 31: Submit for Approval
After you’ve submitted the job offer, a confirmation message pops up. Click the **OK** button.

![Offer Details and Background Check](image)

**You have successfully submitted Sally Seminole's job offer. (0,0)**

![Confirmation Message](image)

STEP 32: Navigate to the **Approvals** tab to review the status of the job offer in the workflow.

![Approvals Tab](image)
NOTE: Once the job offer is fully approved, Human Resources will launch the Smart Onboarding invitation to the candidate and the department will receive an email.

Any visiting scholars that require a J-1 visa will route automatically through the Center for Global Engagement.

To check the job offer status in workflow, navigate to the job opening through Recruiting > Search Job Openings > across from the candidate’s name, click Other Actions > Recruiting Actions > Prepare/View Job Offer > Approvals tab.

Questions
- For general questions about this procedure, email hr-courtesydocs@fsu.edu.
- For Visiting Scholar questions, contact Diana Key at dkey@fsu.edu.
- For questions regarding the J-1 process or non-resident alien visas, email cge@fsu.edu.