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 the Courtesy 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_ERS_ADD_EXPRESS
- 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.

Confirm the Candidate’s FSU Affiliation

STEP 3: Prior to creating the appointment record, ask the hiring manager if the candidate is new to FSU or if they have an affiliation with FSU (i.e., are they a current employee, former employee, or current/former student):

- If the candidate is a current employee, former employee, or current/former student, ask them to provide you with their Empl ID/Student ID and FSUID for the purpose of the department creating the appointment record.
  - The candidate can find this information by logging into the myFSU portal and referring to the section under “Welcome” in the upper right of the page.
  - *Never ask for a candidate’s password.*
  - Obtain a valid email address from the candidate.

- If the candidate is not affiliated with FSU, or is affiliated, but does not know their FSUID and Empl ID/Student ID, proceed with adding them as a candidate new to FSU.
  - Obtain a valid email address from the candidate.

STEP 4: Log into myFSU > click on the HR icon.
Appointing the Visiting Scholar via Courtesy Express

STEP 5: Click the Recruiting tile.
Adding CANDIDATES NEW TO FSU

STEP 6a: On the Express Appt page:

a. Allow Applicant Type to default to “Express Appt”.

b. Enter the candidate's legal name in the First Name and Last Name fields.

c. Click Add Email Address > choose email type > enter a valid email address > click Save or Save and Create Another to create additional express appointments.

Note: The email provided is where the Smart Onboarding invitation will be sent later in the process. For email type, please only use “Other” or “Home” – inserting a “Campus” or “Business” email type will result in the candidate not receiving the “Activate your FSUID” email.

d. Note the Applicant ID that generates and proceed to step 7.
Adding EMPLOYEES, REHIRES, and CURRENT & FORMER FSU STUDENTS

IMPORTANT! Completing the steps below will sync the onboarding invitation with the candidate’s myFSU account; therefore, it is very important that you have confirmed their affiliation. If in doubt, enter as an Express Appt versus an Employee.

STEP 6b: If the candidate is a current employee, former employee, or current/former student, and has provided their Empl ID/Student ID and FSUID, take the following steps:

On the Express Appt page:

- Choose Employee from the Applicant Type dropdown menu > click Search.

b. On the search page, enter the candidate’s Empl ID/Student ID in the Empl ID/Student ID field and FSUID in ALL CAPS in the User ID field > click Search.

c. When you have confirmed a match, click Select to continue adding the record.
d. The legal name and last known email address will populate on the page. **Update the email address if needed.**

e. Click **Save**, or **Save and Create Another** to add additional express appointments.

f. Note the **Applicant ID** that generates and proceed to step 7.

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**Notes:**

- The email address provided is where the Smart Onboarding invitation will be sent later on in the process. *If the appointment is created with an Empl ID/Student ID, it will carry over to the job offer. When the Onboarding invitation is launched, the candidate will be directed to log in at the myFSU portal to complete onboarding.*
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 appropriate Courtesy Job Code. To determine the appropriate Courtesy 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.

![Image of the FSU Offer - Additional Info form with a highlighted Location Code field set to EOAS BUILDING1009A and an Employee ID field set to Bill Bellamy.](image-url)

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

![Image of the FSU Offer - Additional Info form with a highlighted Supervisor ID field set to 000012345 and an Employee ID field set to Bill Bellamy.](image-url)
**STEP 19:** Enter the appropriate **Mail Code** or use the lookup icon to search for the desired Mail Code.

![Image showing the Mail Code field in a form]

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

![Image showing the U.S. Citizen? dropdown menu in a form]
**STEP 21:** Click the *Empl Class* drop-down menu. Select the appropriate classification. "Vstg Schlr" should be used for Unpaid Visiting Scholars.

![Image of the Empl Class dropdown menu with Vstg Schlr selected]

**STEP 22:** Enter the appropriate weekly standard hours. Most visiting scholar appointments will have a 0.01 standard hours entry.

![Image of the FSU Offer - Additional Info form with the Weekly Std Hours field set to 0.01]
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](image)

**Offer Attachments**

No attachments have been added to this offer.

![Approval Attachments](image)

Step 27: Attach the approved Request to Invite form by clicking the **Approval Attachments** button and uploading the document.

![Offer Attachments](image)

**Offer Attachments**

No attachments have been added to this offer.

![Approval Attachments](image)

Business Unit: FSU01  
Offer Date: 01/17/2020  
Applicant Type: External Applicant  
Registered Online: No  
Preferred Contact: Not Specified

Attachments

<table>
<thead>
<tr>
<th>Type</th>
<th>Description</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Attachment</td>
<td></td>
<td>Request_toInvite.pdf</td>
</tr>
</tbody>
</table>
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 level will generate at the bottom of the questionnaire.

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

<table>
<thead>
<tr>
<th>Part 1. Outside Documents to replace/carry FSU Background Check:</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Is this job role located in the FSU Childcare Center?</td>
</tr>
<tr>
<td>2. Does this job role require a specific background check to be performed for which approved external agencies complete screenings? <em>(e.g., DRS positions, positions in the K-12 school system, etc.)</em></td>
</tr>
<tr>
<td>3. 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. Will this person be working or volunteering with a University Sponsored Summer Camp held between May and September?</td>
</tr>
</tbody>
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<tr>
<th>Part 2. Level 2 Background Check Required Duties:</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. 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. Is the position classified as Vice President level or above by job code/administrative code?</td>
</tr>
<tr>
<td>3. 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: HP will conduct the Standard portion of the Criminal History Background Check.</td>
</tr>
<tr>
<td>4. Is fingerprinting a requirement by granting agencies for grants and contracts?</td>
</tr>
<tr>
<td>5. Will this person be working or volunteering with regulated materials regardless of quantity [DHS Chemicals of Interest, DEA controlled substances, HRC, Toxic Substances, DOT Security Plan, or has unescorted access to lead materials?</td>
</tr>
</tbody>
</table>

<table>
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<tr>
<th>Part 3. Standard Background Check Required Duties:</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Will this person perform fiscal duties to include budgeting, accounting, or having direct access to cash (except petty cash), checks, and/or credit/credit cards to include making and/or receiving payments?</td>
</tr>
<tr>
<td>2. 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. Will this person have control over University-wide operational processes through functional roles or system security access?</td>
</tr>
<tr>
<td>4. Will this person have access to sensitive, secure, and/or confidential personal information or individuals, such as students, faculty, staff, or alumni <em>(e.g., social security numbers, dates of birth, etc.)</em>?</td>
</tr>
<tr>
<td>5. 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.

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