Appointing Courtesy Candidates via Courtesy Express

This guide will detail the steps to appoint Courtesy Appointment candidates via Courtesy Express in OMNI HR.

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 Courtesy recruitment 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_ERS_ADD_EXPRESS and FSU_SS_MANAGER
- **OMNI Recruiting Training Guides**
- **Courtesy Supplemental Docs**
- **Courtesy Job Codes**
Confirm the Candidate’s FSU Affiliation

**STEP 1:** 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.
  - FSUIDs can also be obtained with the **FSU_USER_ID** query if the candidate’s EMPLID is readily available.

- 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 2:** Log into myFSU > click on the HR icon.
Create the Courtesy Express Appointment Record

STEP 3: From the Department Administration page or the Navigator > click Recruiting > Add Express Appointment.

NOTE: Department Representatives can also reach this page by going to the Navigation Bar > Recruiting > Add Express Appointment.
Adding CANDIDATES NEW TO FSU
STEP 4a: 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 5.
**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 4b:** 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 5.

**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 5:** Navigate to **Recruiting > Search Applicants** > enter the applicant ID in the **Applicant ID** field > click **Search**.
**STEP 6:** Across from the candidate’s name, use the **Actions** drop down menu to select **Link Applicant to Job**.

![Image of applicant and job linking process]

**STEP 7:** Enter or select the current semester’s Courtesy Express job ID in the **Job Opening ID** field > click **Link**.

![Image of Link Applicant to Job Openings page]

In the **Disposition Information** section, select **Linked** from the drop-down menu, enter a reason if necessary, and click **Link**.
Preparing the Job Offer

STEP 8: After the applicant’s record has been successfully linked, click on the candidate’s name to be redirected to the job openings(s) associated with the applicant’s ID.

<table>
<thead>
<tr>
<th>Select</th>
<th>Applicant</th>
<th>Applicant ID</th>
<th>Type</th>
<th>Status</th>
<th>Phone</th>
<th>Email Address</th>
<th>Date Applied</th>
<th>Jobs Applied</th>
</tr>
</thead>
<tbody>
<tr>
<td>☐</td>
<td>Testing Example</td>
<td>123456</td>
<td>Express Appt</td>
<td>010 Active</td>
<td></td>
<td><a href="mailto:testing@isu.edu">testing@isu.edu</a></td>
<td>02/25/2019</td>
<td>0</td>
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</tbody>
</table>

STEP 9: Under the appropriate Job Opening, click on Other Actions.
STEP 10: Click Recruiting Actions > Prepare/View Job Offer.

STEP 11: Begin on the Offer Details tab.

Step 12: Navigate to the Comments section. Enter information pertaining to the candidate and/or job offer, such as employee ID (if a current employee), type of appointment (new, rehire, additional appointment), description of duties, and whether 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.
STEP 13: 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 14: Enter the appropriate Department or use the lookup button to search and select the desired Department.
**STEP 15:** Enter the appropriate **Location Code** or use the lookup button to search and select the desired Location Code.

**STEP 16:** Enter the appropriate **Supervisor ID** or use the lookup icon to search for the desired Supervisor ID.
STEP 17: Enter the appropriate Mail Code or use the lookup icon to search for the desired Mail Code.

![FSU Offer - Additional Info]

STEP 18: Click the U.S. Citizen? drop down menu. Select the appropriate answer from the list.

![FSU Offer - Additional Info]
STEP 19: Click the Empl Class drop down menu. Select the appropriate classification - "Courtesy" should be used for standard Courtesy appointments.

NOTE: Appointments for Visiting Scholars should select the “Vstg Schlr” Empl Class. Please see the Appointing Unpaid Visiting Scholars via Courtesy Express.

STEP 20: Enter the appropriate weekly standard hours. For teaching Faculty appointments, please enter the exact number of weekly hours.

For all other courtesy appointments, please insert 0.01.
STEP 21: 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 22: Enter the Begin Date.

**Note:** Start dates should be 2-3 weeks out to allow times for approvals, Smart Onboarding completion, and background check completion (if applicable).

STEP 23: 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 24:** 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/satisfy Fsu Background Check:</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Is this job/role located in the FSU Childcare Center? NO</td>
</tr>
<tr>
<td>2. 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.) NO</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; NO</td>
</tr>
<tr>
<td>4. Will this person be working/volunteering with a University Sponsored Summer Camp held between May and September? NO</td>
</tr>
</tbody>
</table>

<table>
<thead>
<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? NO</td>
</tr>
<tr>
<td>2. Is the position classified as Vice President level or above by job code/administrative code? NO</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; HR will conduct the Standard portion of the Criminal History Background Check NO</td>
</tr>
<tr>
<td>4. Is fingerprinting a requirement by granting agencies for grants and contracts? NO</td>
</tr>
<tr>
<td>5. Will this person be working/volunteering with regulated materials regardless of quantity (DHS Chemicals of interest, DEA controlled substances, NRC Radiactive Materials), or is the position located in a facility covered by a DOT Security Plan, or has unassorted access to said materials? NO</td>
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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 cards to include making and/or receiving payments? NO</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? NO</td>
</tr>
<tr>
<td>3. Will this person have control over University-wide operational processes through functional roles or system security access? NO</td>
</tr>
<tr>
<td>4. 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.)? NO</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? NO</td>
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<th>Part 4:</th>
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<tbody>
<tr>
<td>1. Will this candidate/position be required to drive a University-owned motor vehicle (including golf carts and other utility vehicles) as part of their regular duties? See University Policy OP-0-0-1-00 for driver’s license check requirements. NO</td>
</tr>
<tr>
<td>2. By selecting &quot;Yes,&quot; I confirm that the above duties have been reviewed by the position supervisor and are accurate. YES</td>
</tr>
</tbody>
</table>
STEP 25: Submit for Approval or Save as Draft
After you’ve submitted the job offer, a confirmation message pops up. Click the OK button.

STEP 26: Navigate to the Approvals tab to review the status of the job offer in the workflow.

To insert an additional approver, click the plus sign at the desired point, ensuring that the HR Final Approver is listed last.

Once the job offer is final approved, Human Resources will launch the Smart Onboarding invitation to the candidate and the department will receive an email.
NOTE: 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 on this procedure? Contact the HR-Courtesy Docs email.