

Appointing External 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 department is requesting a courtesy appointment. The courtesy appointment permits the individual to receive access to University privileges, such as FSU email accounts, computer system access, or building access. 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 Documents](#)
- [Courtesy Job Codes](#)

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Confirm the Candidate's FSU Affiliation

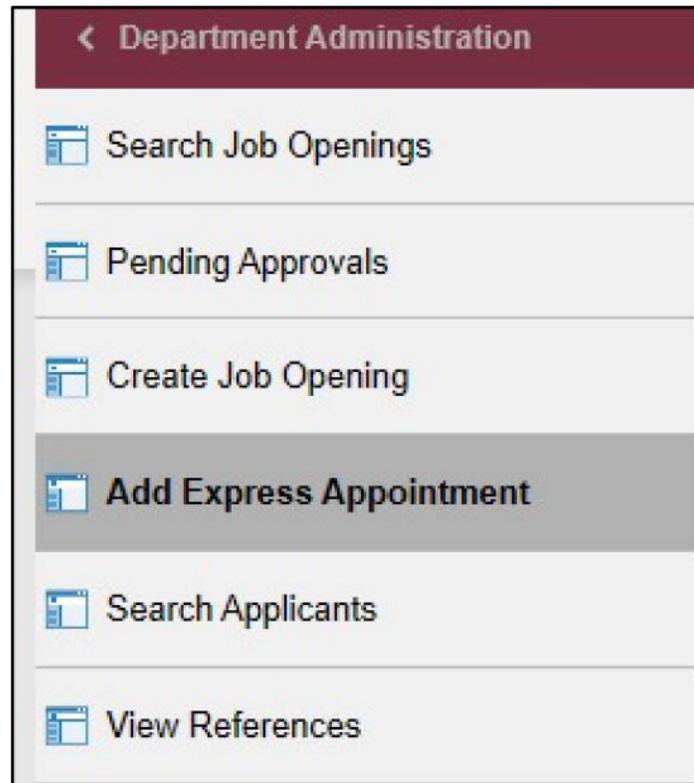
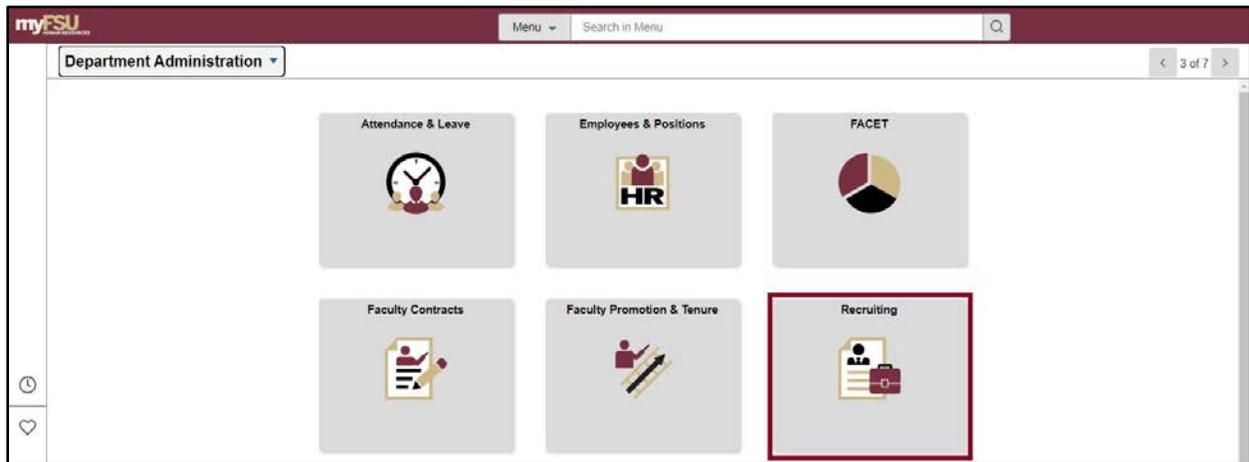
1. Prior to creating the appointment record, ask the hiring manager if the candidate is new to FSU or if they have any affiliation with FSU (i.e., are they a current employee/student):
 - a. If the candidate is not affiliated with FSU, or is affiliated, but does not know their FSUID and Empl ID/Student ID, proceed with adding them as a candidate new to FSU.
 - i. Obtain a valid, non-FSU email address from the candidate.
2. Log into **myFSU** > click on the **HR icon**.



Create the Courtesy Express Appointment Record

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

4. 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 select **Home** or **Other** – inserting an FSU email domain will result in an error and not allow you to save.

The screenshot shows the 'Express Appt' form interface. At the top, there are buttons for 'Save' and 'Save and Create Another'. Below this, the form is divided into several sections: 'Applicant' with fields for 'Applicant Type' (set to 'Express Appt') and 'Preferred Contact' (set to 'Not Specified'); 'Applicant Status' with fields for 'Status Code' (set to 'Active'), 'Status Reason', and 'Status Date' (06/22/2022); 'Name' with fields for 'Name Format' (English), 'Name Prefix', 'First Name', 'Middle Name', 'Last Name', and 'Name Suffix'; and 'Email Addresses' and 'Phone Numbers' sections, both currently empty. A note is present regarding existing employees or students. The 'Add Email Address' button is highlighted with a red box.

- d. Note the **Applicant ID** that generates and proceed to step 5.

This screenshot shows the 'Express Appt' form after the applicant has been created. The 'Name' field now contains 'Testing Example'. The 'Applicant ID' is displayed as '682002' and is highlighted with a red box. The form also shows navigation buttons for 'Personal Information' and 'Applications'.

Linking the Record to the Courtesy Express Pool

5. Navigate to **Recruiting** > **Search Applicants** > enter the applicant ID in the **Applicant ID** field > click **Search**.

Find Appt/Applicants

[Recruiting Home](#)

Quick Search | **Keyword Search** | **Advanced Search**

▼ **Search Criteria** ?

Search My Applicants

First Name

Last Name

Alternate Character Name

Applicant Status

Applied Within

Applied Between **And**

Job Opening ID

Applicant ID

Search | **Clear**

6. Across from the candidate's name, use the **Actions** drop down menu to **select Link Applicant to Job**.

Applicant	Applicant ID	Type	Status	Phone	Email Address	Date Applied	Jobs Applied	Actions
Testing Example	123456	Express Appt	010 Active		testing@fsu.edu	02/25/2019	1	▼ Actions Link Applicant to Job Send Correspondence

Deselect All ▼ Group Actions

- Enter or select the current semester's Courtesy Express job ID in the **Job Opening ID** field > click **Link**.

Link Applicant to Job Opening x

Applicants to be Linked

Applicant	Name	Status	Email Address
<input type="text" value="723057"/>	Reggie Renegade	010 Active	

Add Applicant

Job Openings

Job Opening ID	Posting Title	Job Posted	Questionnaire
<input style="border: 2px solid red;" type="text" value="50300"/>	Courtesy Express Spring 2022	No	No

Add Job Opening

Disposition Information

*Disposition

Reason

Date 05/10/2022

Link **Cancel**

Preparing the Appointment

- 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.

Find Appt/Applicants

[Recruiting Home](#)

▶ **Search Criteria** ?

1 Result(s) Found

Search Results ?

Select	Applicant	Applicant ID	Type	Status	Phone
<input type="checkbox"/>	Reggie Renegade	723057	Express Appt	010 Active	

9. Under the appropriate Job Opening, click on **Other Actions**.

Manage Applicant

Save | Return | Recruiting Home | Search Applicants | Create Applicant | Add Application | Personalize

Name Reggie Renegade
Applicant ID 723057
Applicant Type Express Appt
Status 010 Active

Preferred Contact Not Specified
Phone
Email
Address

Applicant Activity | Notes | Applicant Data | Interested Parties

Current Status | Interview Evaluation | Expenses | History

Applicant Activity

Select	Job Opening	Job Opening ID	Disposition	Application	Resume	Route	Print	Other Actions
<input type="checkbox"/>	Courtesy Express Spring 2022	50300	Linked					▼ Other Actions

10. Click **Recruiting Actions > Prepare/View Job Offer**.

Manage Applicant

Save | Return | Recruiting Home | Search Applicants | Create Applicant | Add Application | Personalize

Name Reggie Renegade
Applicant ID 723057
Applicant Type Express Appt
Status 010 Active

Preferred Contact Not Specified
Phone
Email
Address

Applicant Activity | Notes | Applicant Data | Interested Parties

Current Status | Interview Evaluation | Expenses | History

Applicant Activity

Select	Job Opening	Job Opening ID	Disposition	Application	Resume	Route	Print	Other Actions
<input type="checkbox"/>	Courtesy Express Spring 2022	50300	Linked					▼ Other Actions Recruiting Actions Applicant Actions > Prepare / View Job Offer Create Interview Evaluation View / Edit Application Details

Select All | Deselect All | Group Actions

11. Begin on the **Offer Details** tab.

Offer Details | Background Check

Job Opening 50300 Courtesy Express Spring 2022

Position Number

Recruiter

Status 006 Pending Approval

Created By

- Navigate to the **Comments** section. Enter information pertaining to the candidate and/or appointment, such as employee ID (if a current employee), type of appointment (new, rehire, additional appointment), and justification of courtesy need. If the appointment is a **Post Doc**, please include financial support information including the source and amount of funding.

Comments 1 of 1 | View All

Collaborating with Professor X needing email and system access. Will not be visiting campus.

Added By

Last Updated By

Add Another Comment

- 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.

FSU Offer - Additional Info

Employee Id

*Job Code Volunteer_OPS Courtesy *Location Code

*Department *Supervisor ID

*Mail Code *Weekly Std Hours *U.S. Citizen? *Empl Class

Pre-Mgr Approver (Optional)

*Originator Telephone

1-1 of 1

	Begin Date
1	<input type="text"/>

14. Enter the appropriate **Department** or use the lookup button to search and select the desired Department.

FSU Offer - Additional Info

Employee Id

*Job Code Volunteer_OPS Courtesy *Location Code

*Department Business Services *Supervisor ID

*Mail Code *Weekly Std Hours *U.S. Citizen? *Empl Class

Pre-Mgr Approver (Optional)

*Originator Telephone

1-1 of 1

Begin Date	
1	<input type="text"/> <input type="button" value="Q"/>

15. Enter the appropriate **Location Code** or use the lookup button to search and select the desired Location Code.

FSU Offer - Additional Info

Employee Id

*Job Code Volunteer_OPS Courtesy *Location Code UNIVERSITY CENTER - BLDGC5500

*Department Business Services *Supervisor ID

*Mail Code *Weekly Std Hours *U.S. Citizen? *Empl Class

Pre-Mgr Approver (Optional)

*Originator Telephone

1-1 of 1

Begin Date	
1	<input type="text"/> <input type="button" value="Q"/>

16. Enter the appropriate **Supervisor ID** or use the lookup icon to search for the desired Supervisor ID.

FSU Offer - Additional Info

Employee Id

*Job Code Volunteer_OPS Courtesy *Location Code UNIVERSITY CENTER - BLDGC5500

*Department Business Services *Supervisor ID

*Mail Code *Weekly Std Hours *U.S. Citizen? *Empl Class

Pre-Mgr Approver (Optional)

*Originator Telephone

1-1 of 1

Begin Date	
1	<input type="text"/> <input type="button" value="Q"/>

17. Enter the appropriate **Mail Code** or use the lookup icon to search for the desired Mail Code.

FSU Offer - Additional Info

Employee Id

*Job Code Volunteer_OPS Courtesy *Location Code UNIVERSITY CENTER - BLDGC5500

*Department Business Services *Supervisor ID Sally Seminole

*Mail Code *Weekly Std Hours *U.S. Citizen? *Empl Class

Pre-Mgr Approver (Optional)

*Originator Telephone

1-1 of 1

Begin Date	
1	<input type="text"/> <input type="button" value="Q"/>

18. Enter the appropriate **Weekly Std Hours**. For *teaching Faculty appointments*, please enter the exact number of weekly hours.
For *all other courtesy appointments*, please insert 0.01.

FSU Offer - Additional Info

Employee Id

*Job Code Volunteer_OPS Courtesy *Location Code UNIVERSITY CENTER - BLDGC5500

*Department Business Services *Supervisor ID Sally Seminole

*Mail Code *Weekly Std Hours *U.S. Citizen? *Empl Class

Pre-Mgr Approver (Optional)

*Originator Telephone

1-1 of 1

Begin Date
1 <input type="text" value=""/>

19. Click the **U.S. Citizen?** drop down menu. Select the appropriate answer from the list.

FSU Offer - Additional Info

Employee Id

*Job Code Volunteer_OPS Courtesy *Location Code UNIVERSITY CENTER - BLDGC5500

*Department Business Services *Supervisor ID Sally Seminole

*Mail Code *Weekly Std Hours *U.S. Citizen? *Empl Class

Pre-Mgr Approver (Optional)

*Originator Telephone

1-1 of 1

Begin Date
1 <input type="text" value=""/>

20. Click the **Empl Class** drop down menu. Select the appropriate classification - **Courtesy** should be used for standard Courtesy appointments. Please review the available Courtesy Empl Classes on the courtesy [website](#).

NOTE: Appointments for Visiting Scholars should select the **Vstg Schlr** Empl Class. Please see the [Appointing Unpaid Visiting Scholars via Courtesy Express](#).

The screenshot shows the 'FSU Offer - Additional Info' form. The 'Empl Class' dropdown menu is open, displaying a list of options: Courtesy, Emeritus, Joint Coll, MCF, MSC, PCF, Phone, Post Doc, RCF, and Vstg Schlr. The 'Courtesy' option is highlighted in blue. Other fields in the form include: *Job Code (YT00), *Location Code (0225C5500), *Department (013000), *Supervisor ID (000114682), *Mail Code (1260), *Weekly Std Hours (0.01), *U.S. Citizen? (Yes), *Originator Telephone (850/644-1234), and a table with a 'Begin Date' field.

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.

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).

The screenshot shows the 'FSU Offer - Additional Info' form with the 'Empl Class' dropdown menu now closed and 'Courtesy' selected. The 'Begin Date' field in the table below is highlighted with a red box and contains the date '04/23/2022'. Other fields in the form are the same as in the previous screenshot.

23. Click the **Background Check** tab.

Offer Details **Background Check**

Budget Manager

Budget Manager Email

Background Check Funding (Required)

Purchase Order # Line #

OR

Foundation Fund # [Approval Submission](#)

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.

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.

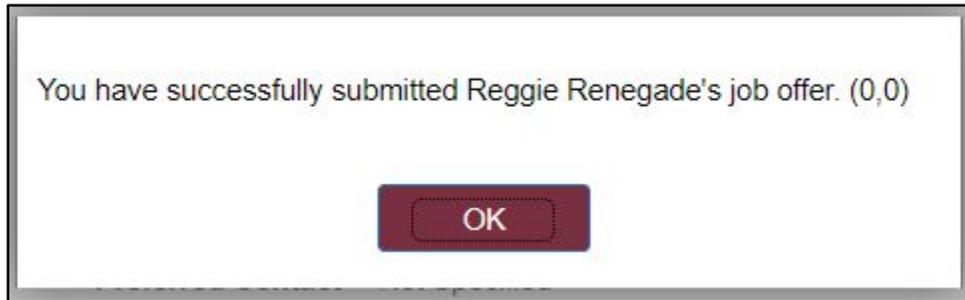
Part 1. Outside Documents to replace/satisfy FSU Background Check:	
1	Is this job/role located in the FSU Childcare Center? <input type="text"/>
2	Does this job/role require a specific background check to be performed for which approved external agencies complete screenings? (e.g., DRS positions, positions in the K-12 school system, etc.) <input type="text"/>
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 "NO." <input type="text"/>
4	Will this person be working or volunteering with a University Sponsored Summer Camp held between May and September? <input type="text"/>
Part 2. Level 2 Background Check Required Duties:	
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? <input type="text"/>
2	Is the position classified as Vice President level or above by job code/administrative code? <input type="text"/>
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 <input type="text"/>
4	Is fingerprinting a requirement by granting agencies for grants and contracts? <input type="text"/>
5	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? <input type="text"/>
Part 3. Standard Background Check Required Duties:	
1	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? <input type="text"/>
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? <input type="text"/>
3	Will this person have control over University-wide operational processes through functional roles or system security access? <input type="text"/>
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.)? <input type="text"/>
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? <input type="text"/>
Part 4:	
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-C-7-G8 for driver's license check requirements. <input type="text"/>
2	By selecting "Yes," I confirm that the above duties have been reviewed by the position supervisor and are accurate. <input type="text"/>

Submitting Appointment or Saving Draft

25. Submit for Approval or Save as Draft

After you have submitted the appointment, a confirmation message pops up. Click the **OK** button.

The screenshot shows the 'Background Check' tab of a form. On the left, there are fields for 'Budget Manager' and 'Budget Manager Email'. In the center, the 'Background Check Funding (Required)' section contains fields for 'Purchase Order #' and 'Line #' (both with search icons), an 'OR' separator, and a 'Foundation Fund #' field with a search icon. Below this is a 'Description of Duties/Comments' text area containing the text: 'Collaborating with Professor X needing email and system access. Will not be visiting campus|'. On the right side, there are two buttons: 'Save as Draft' and 'Submit for Approval', both highlighted with red boxes. Below these are three smaller buttons: 'Add Revised Offer', 'Delete Offer', and 'Edit Offer'.



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

The screenshot shows the 'Approvals' tab selected in a navigation bar. The navigation bar has three tabs: 'Offer Details', 'Background Check', and 'Approvals', with 'Approvals' highlighted by a red box. Below the navigation bar, the text 'Job Opening 50300' is on the left and 'Courtesy Express Spring 2022' is on the right.

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

Once the appointment 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 appointment 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.

Editing an Offer: The **edit offer** button is only live during the draft job offer stage. If you need to change a submitted appointment, it must be denied by the approver so the originator may **add revised offer**. At the add revised offer step, the data will be retained and editable. Once edits have been made, click **Submit for Approval**.

The screenshot displays the 'Offer Details' page for an FSU Job Offer. At the top, there are three tabs: 'Offer Details', 'Background Check', and 'Approvals'. Below the tabs, the 'FSU Job Offer Workflow' is shown. The workflow starts with a 'Job Offer: Pending' status. The first step is 'Pending' with the role 'FSU Job Opening Dept. Mgr.'. This is followed by two 'Not Routed' steps, both requiring 'Multiple Approvers'. The first 'Not Routed' step is for 'HR Background Check Approver', and the second is for 'HR Final Approver-Courtesy'. A 'Submit' button is located below the workflow steps. At the bottom, there is a 'Comments' section with a text input area.

Questions? For general questions about this procedure, email hr-courtesydocs@fsu.edu.